



# Numerator


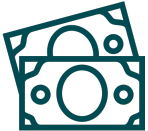
NEW FRONTIERS

**The Whole New Frontier:** The 21-Slide Guide to Engaging Specialty Dieters and Healthy Eaters

*"Between more plant-based eating and a continued focus on sustainability, consumers are still concerned with the origin of their food and how that food impacts not only their health but the health of others around them"*

<https://www.everydayhealth.com/pictures/top-healthy-food-trends/>

# Those who follow a specialty-food diet\* spend **33%** more per year on groceries and shop more often

	 Purchase Frequency	 Spend Per HH on Groceries
Dieters	<b>290</b>	<b>\$6,788</b>
All Shoppers	218	\$5,068

Numerator OmniPanel: Shopper Profile, 12 months ending 1/31/2020

Dieters vs All Shoppers

\*Vegetarian, Vegan, Gluten Free, Keto, Intermittent Fasting, Flexitarian, Mediterranean, Pescatarian, Whole30, South Beach, FODMAP

# These dieters are the demographics that retailers and brands want to target



## AGE

**Millennials**

27.9% 119 Index

**Gen X**

41.4% 133 Index



## INCOME

**High Income**

48.3% 114 Index



## HOUSEHOLD SIZE

**3 Person**

17.9% 127 Index



# Attitudes show these shoppers are open-minded, carefree with their finances, and dine out frequently



167

**Index**

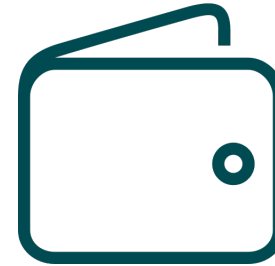
Innovators



166

**Index**

Trust Advertised  
Brands



209

**Index**

Puts off savings  
for now



168

**Index**

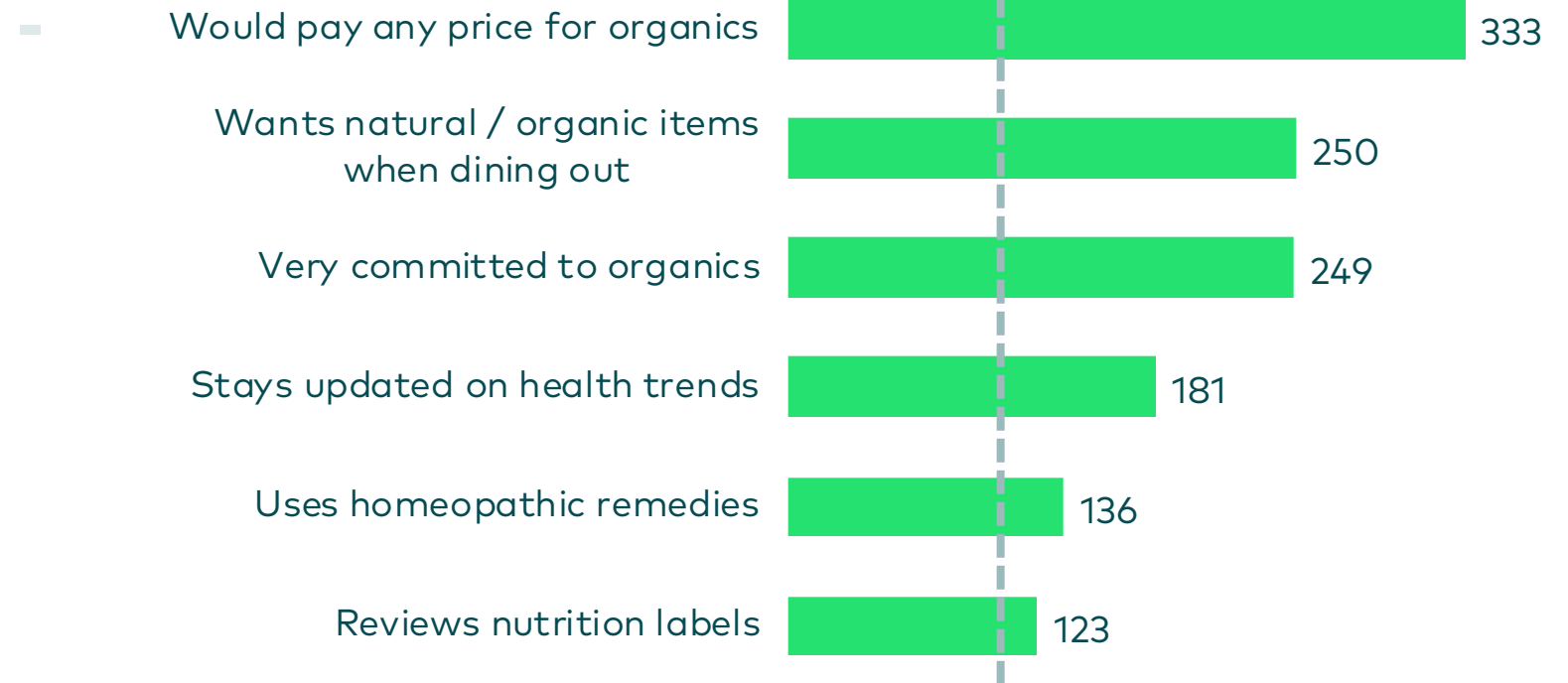
Dines out 6+  
times per week

# And these dieters also have a strong mindset towards organics and staying at the forefront of health trends



## Psychographics

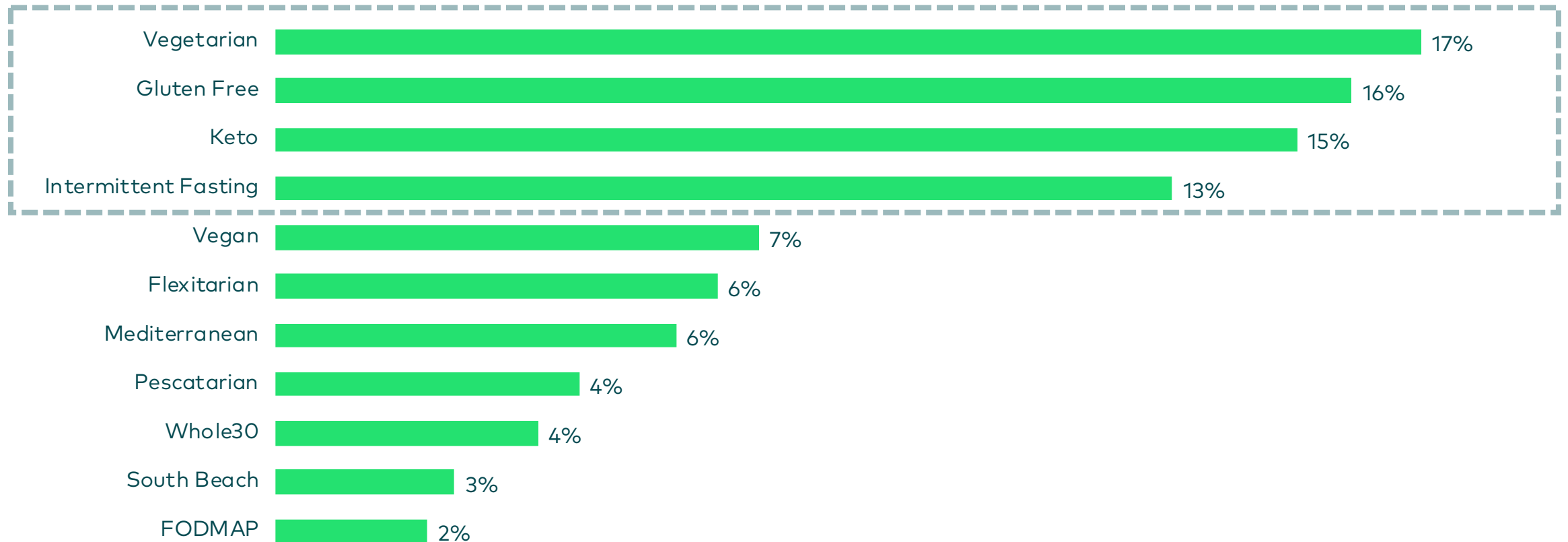
Index vs Non-Dieters



# 2020 Diet Trends

# Vegetarian, Gluten Free and Keto are the most popular food diets, with a variety of other types still relevant

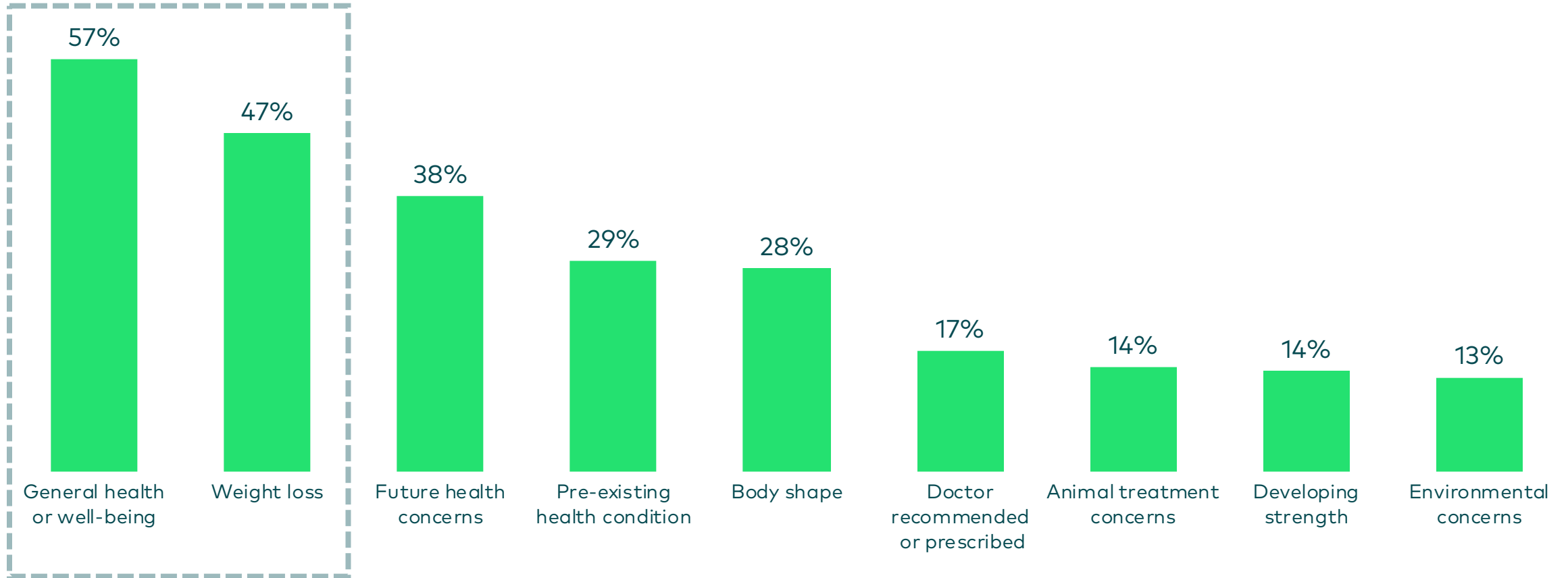
## Primary Diets





# General health and weight loss are the leading considerations when deciding to follow a specific diet

## Top Considerations

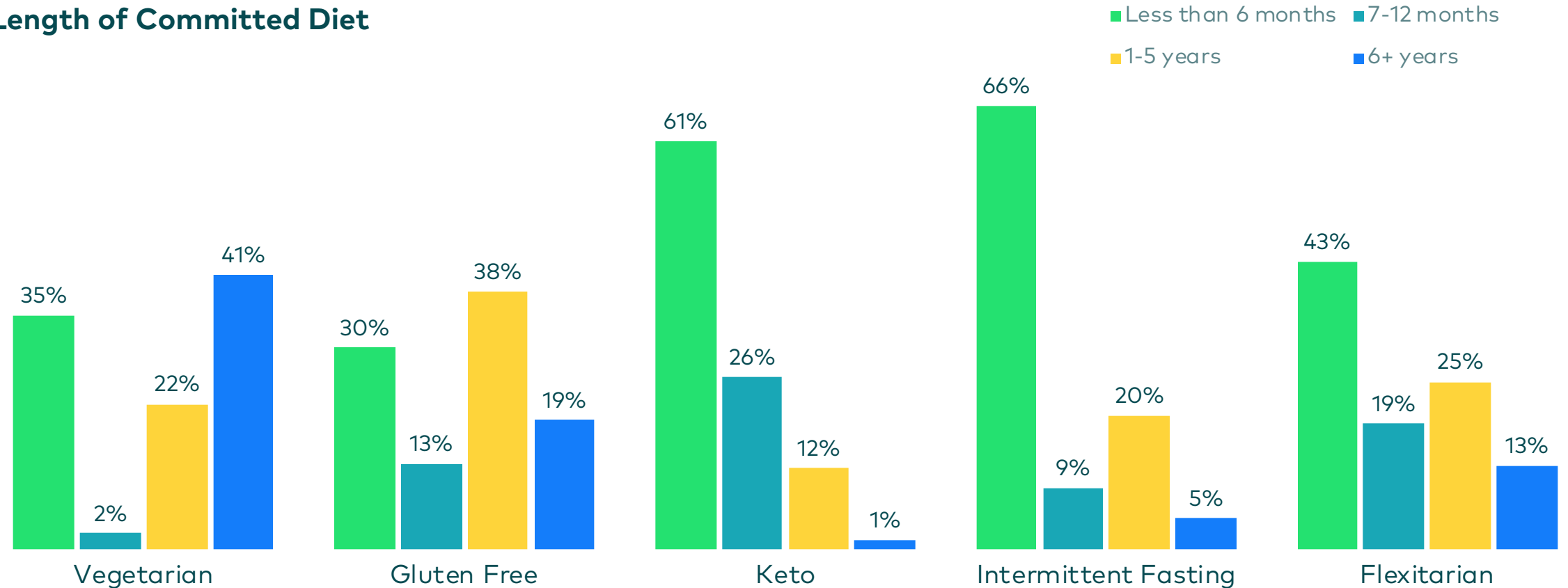


Numerator Survey; Dieters N=501

Q3: What were all your considerations when deciding to begin this diet? [Select all that applies]

# Vegetarian shoppers are more likely to be practicing their diet for a longer period of time

## Length of Committed Diet

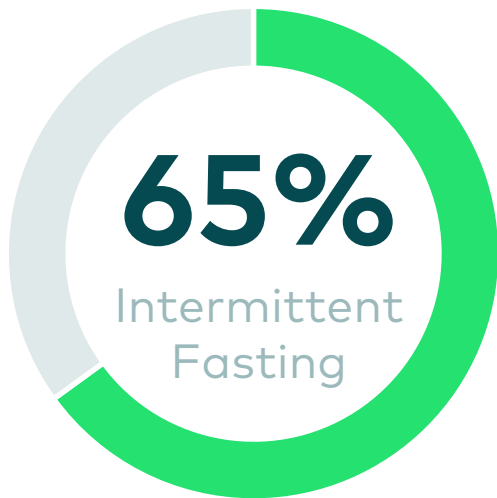


Numerator Survey; Vegetarian N=83, Gluten Free N=78, Keto N=74, IF N=65, Flexitarian N=32  
Q2: Approximately how long have you been practicing this diet?

# Specific diets skew to certain reasons



Weight Loss



Preexisting Health condition



Diet because of the Treatment of Animals

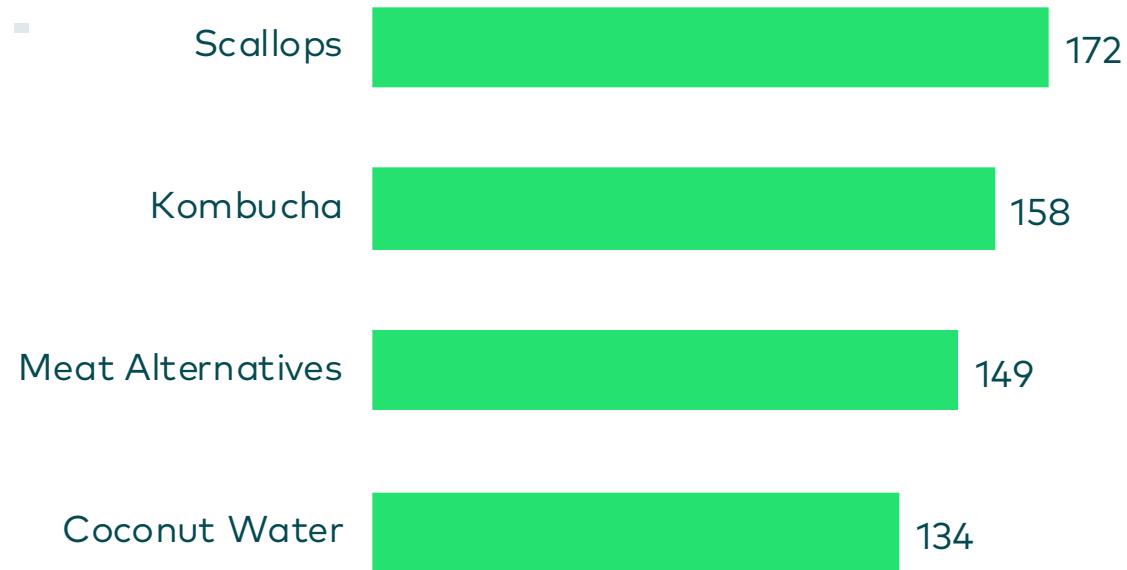
**For every trend,  
there is a counter trend**

<https://health.usnews.com/health-news/blogs/eat-run/articles/top-food-trends-for-2020>

# Dieters tend to follow popular healthy food category trends

## High Index: Major Categories in Grocery

Index vs Non-Dieters

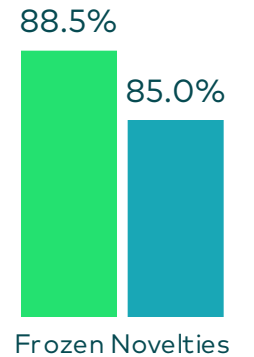
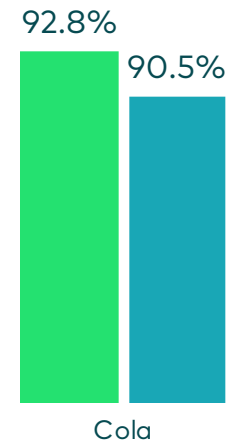
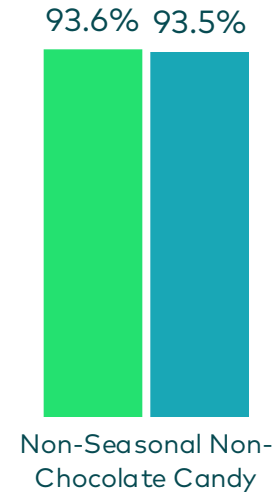
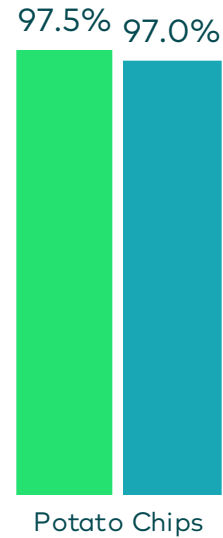
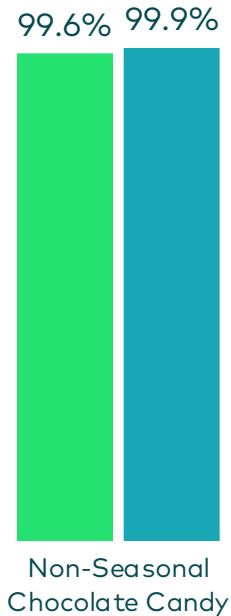


# But they are still buying unhealthy categories at similar rates to non-dieters...



**% Households Purchasing**

■ Dieters  
■ Non-Dieters



Category	Dieters	Non-Dieters
<b>Category Purchase Frequency</b>	21.7	22.0
<b>Category Spend per Trip</b>	\$3.78	\$3.83

Category	Dieters	Non-Dieters
<b>Category Purchase Frequency</b>	17.9	18.9
<b>Category Spend per Trip</b>	\$3.43	\$3.76

Category	Dieters	Non-Dieters
<b>Category Purchase Frequency</b>	15.2	15.5
<b>Category Spend per Trip</b>	\$3.20	\$3.59

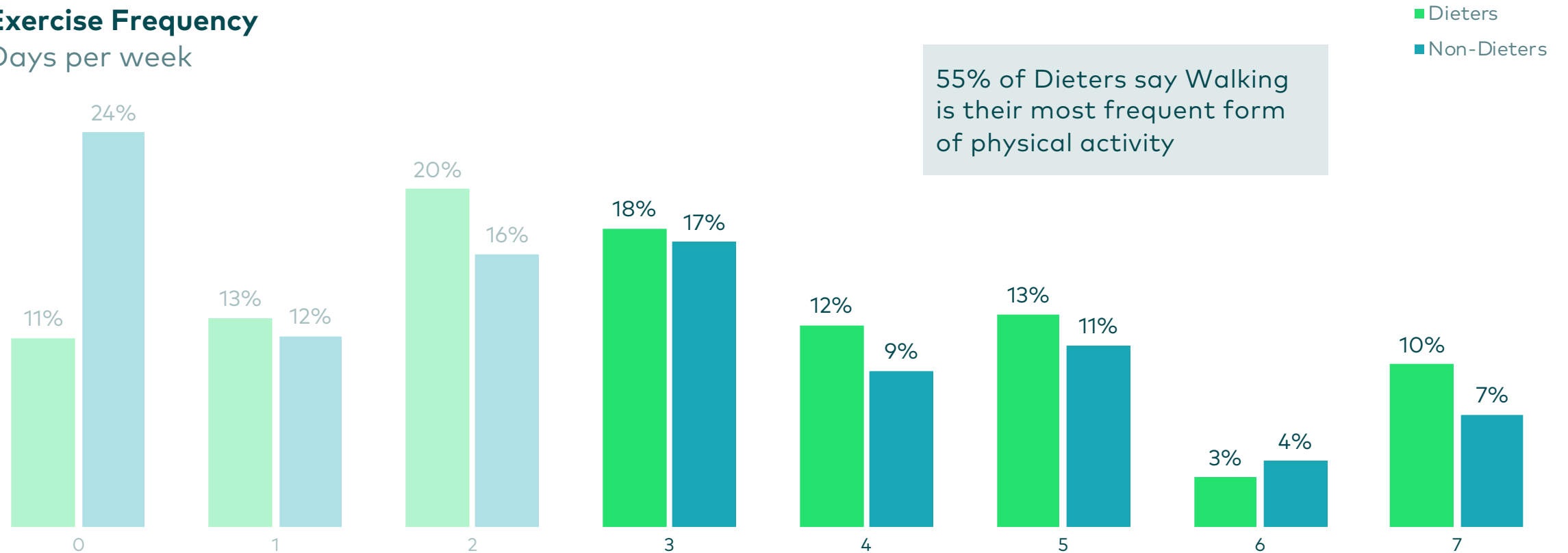
Category	Dieters	Non-Dieters
<b>Category Purchase Frequency</b>	19.9	20.7
<b>Category Spend per Trip</b>	\$5.59	\$5.66

Category	Dieters	Non-Dieters
<b>Category Purchase Frequency</b>	6.8	6.7
<b>Category Spend per Trip</b>	\$5.41	\$5.53

# ...and only exercise slightly more than non-dieters

## Exercise Frequency

Days per week



Numerator Survey; Dieters N=501, Non-Dieters N=530

Q7: Thinking of the past 7 days, how many days did you exercise for at least 20 minutes?

# Where are they shopping?



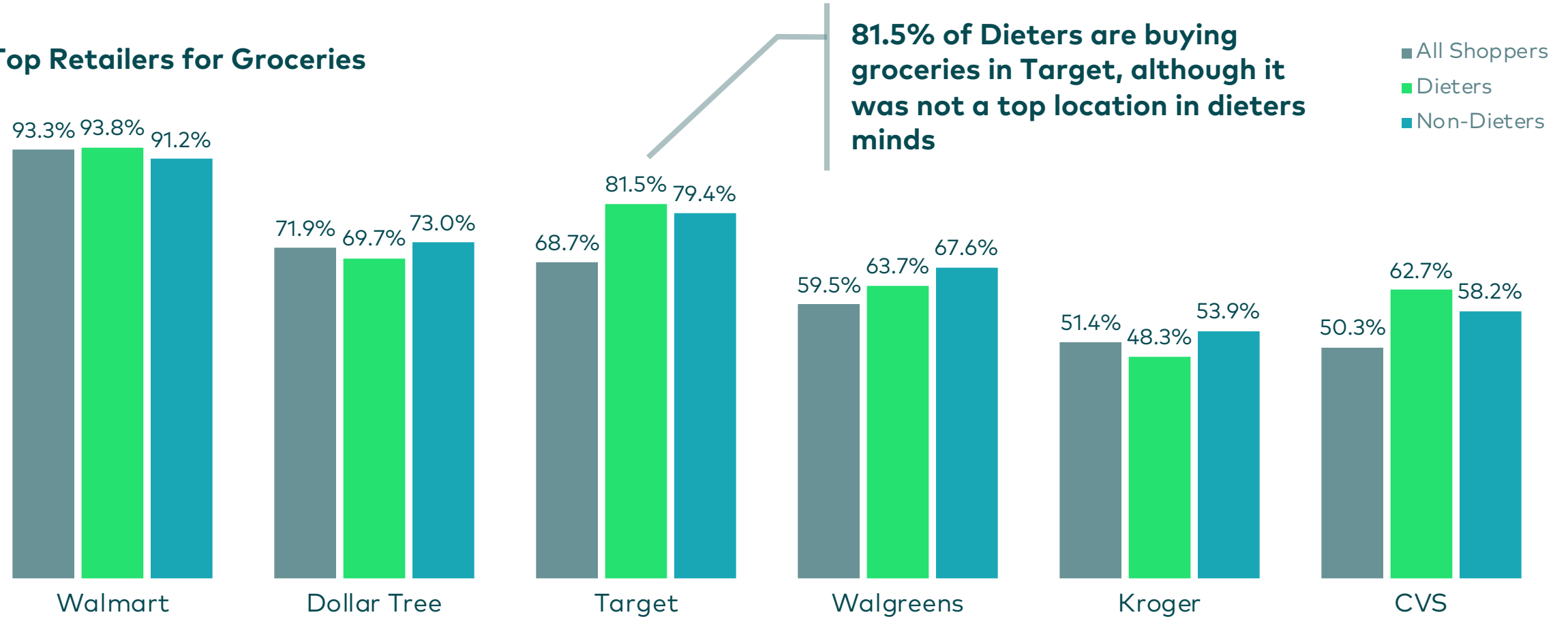
# Top 5 retailers where dieters say they purchase groceries for their specialty diets



# Target, Dollar Tree, and Drug have opportunity!

Shoppers are in their stores, but not thinking of these retailers for their specialty diet shopping needs

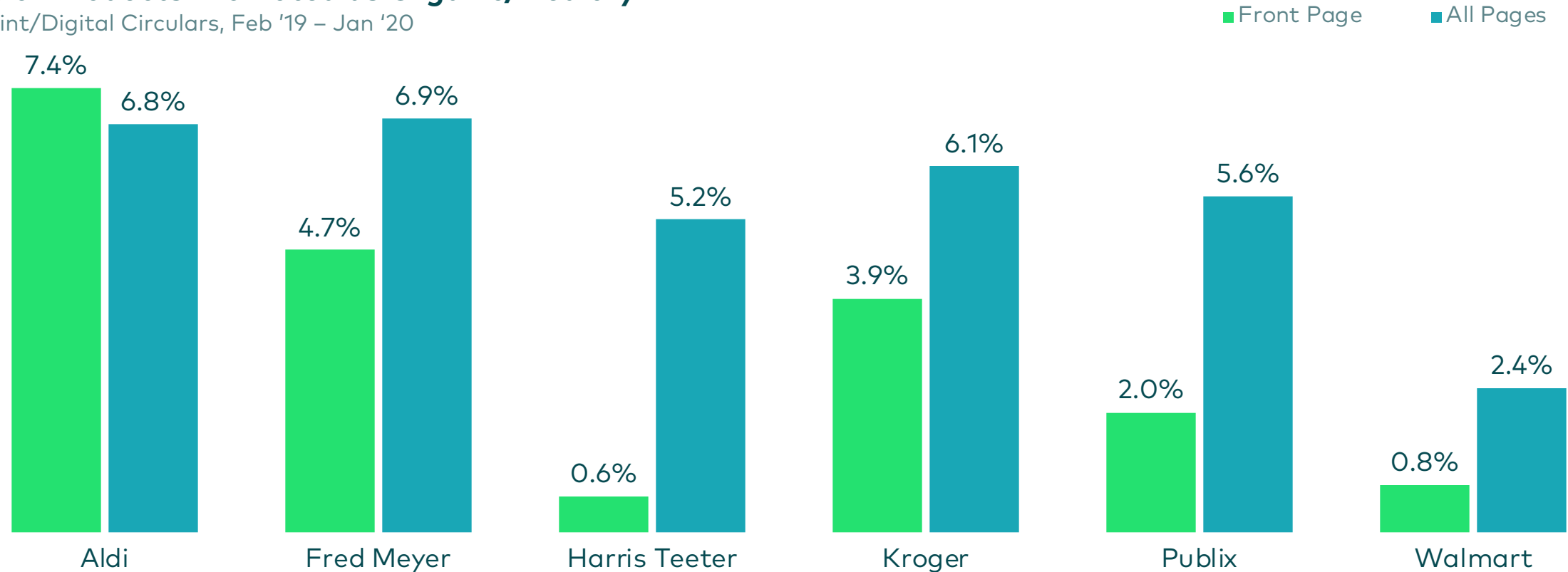
## Top Retailers for Groceries



# Top retailers for dieters' specialty food needs are promoting their organic/healthy products

## % of Products Promoted as Organic/Healthy

Print/Digital Circulars, Feb '19 – Jan '20



# Aldi and Kroger are catching the eyes of shoppers with their organic and healthy messaging in their circulars

Aldi Circular, 1/8/20

Walmart Circular, 1/12/20

Kroger Circular, 1/22/20

Kroger Bonus Page, 1/8/20

## What we're seeing

As health trends continue to grow, diets continue to emerge, and aren't going anywhere

However, dieters still have an appetite for unhealthy habits

Dieters are open minded, shop for healthy options, and dine out multiple times a week

## Why it matters to you

Dieters skew Millennials and Gen X – valuable demographics!

Dieters and non-dieters alike are shopping everywhere, with dieters spending more on groceries than non-dieters

Dieters are likely to trust advertising, and are delaying personal savings

## How you can take action

Contact your Numerator consultant to discuss applications

RETAILERS: Messaging, in store displays, key placements in circulars of health-related items

BRANDS: Stay up to date on health and diet trends, and have offerings appealing to both the dieter and non-dieter





# Numerator

NEW FRONTIERS

Learn how your consumer's behavior is shifting  
[hello@numerator.com](mailto:hello@numerator.com)