

# Diet Trends - US - November 2012

## Scope and Themes



*“The diet industry is expected to do well in light of the current obesity epidemic. However, with sales of certain products down, consumers are turning to products that provide long-term wellness solutions rather than a quick fix. Diet brands poised to help consumers make lifestyle changes will be effective.”*

– Emily Krol, Health and Wellness analyst

## In this report we answer the key questions:

- **What effect will legislations have on consumers’ diets?**
- **With consumers taking more of a wellness/healthy eating approach, how can diet products stay relevant?**
- **How can diet brands innovate in this market?**

With more than one third of Americans obese, and 42% expected to be obese by 2030, obesity is a major issue in the U.S. As such, the market for diet products is in a prime position to grow to help combat obesity. There is a lot of confusion regarding how to lose weight, and what is “healthy” when it comes to dieting. Diet industry brands are well positioned to help guide consumers in their dieting and food selection process, and to provide education on healthy weight loss.

The purpose of this report is to identify the behavior and attitudes American consumers have toward dieting. This report focuses on how diet practices differ by age and gender; it also analyzes trends and innovations in diet foods and programs. This report will help makers of diet products understand the market drivers and conditions that are impacting how, when, and why people diet. It also covers

**BUY THIS  
REPORT NOW**

**VISIT:**

[store.mintel.com](http://store.mintel.com)

**CALL:**

EMEA

+44 (0)207 778 7151

Americas

+1 (312) 943 5250

APAC

+61 (0)2 8284 8100

Brazil

0800 095 9094

**EMAIL:**

[oxygen@mintel.com](mailto:oxygen@mintel.com)

**DID YOU  
KNOW?**

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

## Diet Trends - US - November 2012

### Scope and Themes

the types of diets that resonate with consumers, as well as opportunities for marketers in the diet landscape. Knowing who to appropriately market diet products to can help players in this space selectively merchandise and reach their target consumers.

For the purposes of this report, “diet” is defined as an eating or drinking regimen with the goal of losing weight. Mintel defines dieters as respondents who are currently dieting, have dieted in the past, or plan on dieting in the future. Mintel also classified respondents into BMI categories:

- Healthy weight: BMI = <25
- Overweight: BMI = 25-29.9
- Obese: BMI = 30+

These categories were based on body mass index (BMI) calculated from respondents’ self-reported height and weight.

This report covers diet products that are used primarily for weight control (weight loss and weight management). FDMx sales data for weight control products (liquid, powder, candy, and tablet), as segmented by SymphonyIRI, are included.

Other product types referred to throughout this report include:

- Digestive treatments
- Frozen and prepared meals
- Snack/energy bars
- Nutritional supplements

This report builds on the analysis presented in Mintel’s *Diet Trends—U.S., May 2010*, as well as the May 2008 and July 2006 reports of the same title.

Healthy eating as a “habit” is not covered in this report (see *Attitudes Toward Healthy Food—U.S. June, 2012*).

**Value figures throughout this report are at retail selling prices (rsp) excluding sales tax unless otherwise stated.**

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

### **SCOPE AND THEMES**

*What you need to know*

*Definition*

*Data sources*

Sales data

Consumer survey data

Advertising creative

*Abbreviations and terms*

Abbreviations

Terms

### **EXECUTIVE SUMMARY**

*Overview*

*The market*

Figure 1: Diet status, July 2012

Figure 2: Body weight goals, by gender and age, July 2012

*Market factors*

Population

Figure 3: Diet status and BMI, by gender, July 2012

Figure 4: Population, by age, 2012-17

Figure 5: Diet status and BMI, by race/Hispanic origin, July 2012

Obesity rates

Unemployment

*The consumer*

Diet plan attributes

Figure 6: Diet plan attributes sought, by gender, July 2012

Reasons to diet

Figure 7: Reasons for dieting, by gender, July 2012

Attitudes toward dieting

Figure 8: Attitudes toward dieting, July 2012

*What we think*

### **ISSUES IN THE MARKET**

*What effect will legislations have on consumers' diets?*

*With consumers taking more of a wellness/healthy eating approach, how can diet products stay relevant?*

*How can diet brands innovate in this market?*

### **INSIGHTS AND OPPORTUNITIES**

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

*Technology*

*Product labels*

*Retail*

*Restaurants*

### **TREND APPLICATIONS**

*Trend: Snack Society*

*Trend: Help Me Help Myself*

*2015 Trend: Access Anything Anywhere*

### **MARKET FACTORS**

*Key points*

*Demographics*

*Age and gender*

Figure 9: Female population, by age, 2007-17

Figure 10: Male population, by age, 2007-17

*Ethnicity*

Figure 11: U.S. population, by race and Hispanic origin, 2007-17

*Obesity*

*Unemployment and underemployment*

Figure 12: U.S. Unemployment and underemployment rates, 2007-12

*Rising healthcare costs*

*Government programs*

### **COMPETITIVE CONTEXT**

*Exercise*

Figure 13: Diet status, by physical fitness program-exercised regularly last 12 months, April 2011-June 2012

*Surgery*

*Not dieting*

*Prescription diet pills*

### **LEADING COMPANIES AND BRANDS**

*Key points*

*Overall weight control category increasing*

Figure 14: FDMx sales of weight control products, by leading companies, 2011 and 2012

*Sales of liquid/powder weight control products up*

Figure 15: FDMx sales of liquid/powder weight control products, by leading companies, 2011 and 2012

*Tablet sales decline*

Figure 16: FDMx sales of tablet weight control products, by leading companies, 2011 and 2012

*Usage of nutritional supplements*

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

Figure 17: Use of liquid/powdered nutritional supplements or liquid breakfast usage, by gender and age, April 2011-June 2012

*Brands of nutritional supplements*

Figure 18: Brands of use of liquid/powdered nutritional supplements or liquid breakfasts, by gender and age, April 2011-June 2012

*Dieters seek foods high in fiber, low in fat*

Figure 19: Diet food products, by gender and age, April 2011-June 2012

*Dieters eating frozen dinners*

Figure 20: Select frozen complete dinners and main course brands consumed, by diet status, April 2011-June 2012

### **INNOVATIONS AND INNOVATORS**

*Diet product introductions*

Figure 21: Share of weight loss product launches, by subcategory, 2004-12

Snack/cereal/energy bars

Digestive and detoxifying treatments

Meal replacement beverages

Prepared meals and meal kits

Vitamins and supplements

*Other products*

New diet methods

Figure 22: Sensa, television ad, 2012

Scales

### **MARKETING STRATEGIES**

*Overview of the brand landscape*

*Brand analysis: Weight Watchers*

Figure 23: Brand analysis of Weight Watchers, 2012

TV presence

Figure 24: Weight Watchers, television ad, 2012

Figure 25: Weight Watchers, television ad, 2012

Online initiatives

Social media

Weight Watchers Success Stories

*Brand analysis: Healthy Choice*

Figure 26: Brand analysis of Healthy choice, 2012

TV presence

Figure 27: Healthy Choice, television ad, 2012

Online initiatives

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

Social media

*Brand analysis: Medifast*

Figure 28: Brand analysis of brand, 2011

TV presence

Figure 29: Medifast, television ad, 2012

Online initiatives

Print

Social media

### **DIET STATUS**

*Key points*

*Dieters not keeping up with obesity trends*

Figure 30: Dieting status, by gender, 2006-12

*More respondents have dieted, are dieting, or plan to diet than not*

*Women more likely to report dieting, but men more likely to need to diet*

Figure 31: Dieting status, by gender, July 2012

*The young future dieters*

Figure 32: Dieting status, by age, July 2012

*Past dieters still want to lose*

Figure 33: Body weight goals, by dieting status, July 2012

### **BODY WEIGHT GOALS**

*Key points*

*Most respondents want to lose weight*

*Women more likely than men to want to lose weight*

Figure 34: Body weight goals, by gender, July 2012

*Younger men looking to gain*

Figure 35: Body weight goals, by gender and age, July 2012

*The price of losing weight*

Figure 36: Body weight goals, by household income, July 2012

*Diet brands appeal by how much weight people want to lose*

Figure 37: Body weight goals, by those who have used or are interested in trying brands of diets, July 2012

*Differences between dieters and nondieters*

Figure 38: Attitudes/Opinions about food, by dieters and nondieters, April 2011-June 2012

### **DIET ATTRIBUTES**

*Key points*

*Dieters don't seek support*

*Female dieters need convenience*

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

Figure 39: Diet plan attributes sought, by gender, July 2012

*Young female dieters fast and furious*

Figure 40: Diet plan attributes sought, by gender and age, July 2012

*Dieters with a long way to go seek easier solutions*

Figure 41: Diet plan attributes sought, by body weight goals, July 2012

*Dieters seek diets that are easy and convenient*

Figure 42: Diet plan attributes sought, by types of diets (have or would use), July 2012

### **DIET INFORMATION SOURCES**

*Key points*

*Most dieters turn to a professional*

Figure 43: Diet information sources, July 2012

*Male dieters trust professionals, female dieters trust friends*

Figure 44: Diet information sources, by gender, July 2012

*Older men most likely to turn to a spouse*

Figure 45: Diet information sources, by gender and age, July 2012

*Differences in information sources based on interest in diet brands*

Figure 46: Diet information sources, by brands of diets use or have used, July 2012

Figure 47: Diet information sources, by types of diets use or have used, July 2012

### **REASONS TO DIET**

*Key points*

*Women want to diet, men have to diet*

Figure 48: Reasons for dieting, by gender, July 2012

*Older dieters more concerned with health*

Figure 49: Reasons for dieting, by age, July 2012

*Those with health conditions more likely to diet*

Figure 50: Diet status, by ailments had in last 12 months, April 2011-June 2012

### **BRANDS OF DIETS**

*Key points*

*Weight Watchers most popular with consumers*

Figure 51: Brands of diets, July 2012

*Differences in diet use by gender*

Figure 52: Brands of diets used or interested in trying, by gender, July 2012

*Younger dieters interested in "newer" diets*

Figure 53: Brands of diets used or interested in trying, by age, July 2012

### **TYPES OF DIETS**

*Key points*

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

*Reducing calories most popular diet*

Figure 54: Types of diets, July 2012

*Men more likely to be interested in most types of diets*

Figure 55: Types of diets used or interested in trying, by gender, July 2012

*Younger dieters interested in technology*

Figure 56: Types of diets used or interested in trying, by age, July 2012

*Parents interested in most diet types*

Figure 57: Types of diets used or interested in trying, by presence of children in household, July 2012

### **ATTITUDES TOWARD DIETING**

*Key points*

*Dieters need to indulge*

Figure 58: Attitudes toward dieting, July 2012

*Women more likely to struggle with diets*

Figure 59: Attitudes toward dieting, by gender, July 2012

*Young women struggle, while young men are confused*

Figure 60: Attitudes toward dieting, by gender and age, July 2012

### **RACE AND HISPANIC ORIGIN**

*Key points*

*Black respondents most likely to be overweight*

Figure 61: Body mass index calculated based on self-reported height and weight, by race/Hispanic origin, July 2012

Figure 62: Diet status, by race/Hispanic origin, July 2012

*Make dieting social for black consumers*

Figure 63: Diet plan attributes sought, by race/Hispanic origin, July 2012

*Black dieters seek out information from a doctor*

Figure 64: Diet information sources, by race/Hispanic origin, July 2012

*Hispanic and black dieters differ in their motivation*

Figure 65: Reasons for dieting, by race/Hispanic origin, July 2012

*Black/Hispanic dieters less likely to calorie restrict*

Figure 66: Types of diets, by race/Hispanic origin, July 2012

*Hispanics may be confused about healthy diets*

Figure 67: Attitudes toward dieting, by race/Hispanic origin, July 2012

### **CLUSTER ANALYSIS**

Figure 68: Target clusters, July 2012

*Cluster 1: Indulgers*

Demographics

Characteristics

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

Opportunity

*Cluster 2: Social dieters*

Demographics

Characteristics

Opportunity

*Cluster 3: Strict dieters*

Demographics

Characteristics

Opportunity

*Cluster characteristic tables*

Figure 69: Diet status, by target clusters, July 2012

Figure 70: Body weight goals, by target clusters, July 2012

Figure 71: Diet plan attributes sought, by target clusters, July 2012

Figure 72: Diet information sources, by target clusters, July 2012

Figure 73: Reasons for dieting, by target clusters, July 2012

Figure 74: Brands of diets used or interested in trying, by target clusters, July 2012

Figure 75: Types of diets used or interested in trying, by target clusters, July 2012

Figure 76: Attitudes toward dieting, by target clusters, July 2012

*Cluster demographics*

Figure 77: Target clusters, by demographic, July 2012

*Cluster methodology*

## **CUSTOM CONSUMER GROUPS: KIDS AND TEENS**

*Key points*

*Obesity among teens*

*Aiming nutrition bars at teens*

Figure 78: Energy/diet snacks and bar usage, among teens by gender and age, April 2011-June 2012

*Nutrition supplements appeal to female teens*

Figure 79: Liquid/powdered nutritional supplements or liquid breakfast usage, among teens by gender and age, April 2011-June 2012

Figure 80: Reasons for using liquid/powdered nutritional supplements or liquid breakfasts, among teens by gender, April 2011-June 2012

*Female emotional eating starts at an early age*

Figure 81: Attitudes and opinions about food, among teens by gender and age, April 2011-June 2012

*Kids understand importance of healthy eating*

Figure 82: Eating habits, among kids by gender and age, April 2011-June 2012

*Diet habits among children*

Figure 83: Diet control, among kids by gender and age, April 2011-June 2012

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

### **CUSTOM CONSUMER GROUPS: BMI**

#### *Key points*

*Older men most likely to be overweight/obese*

Figure 84: Body mass index calculated based on self-reported height and weight, by gender and age, July 2012

*Overweight/obese more likely to diet*

Figure 85: Diet status, by BMI, July 2012

*Obese dieters seek most attributes*

Figure 86: Diet plan attributes sought, by BMI, July 2012

*Professional sources appeal to obese*

Figure 87: Diet information sources, by BMI, July 2012

*Brands of diets*

Figure 88: Brands of diets, by BMI, July 2012

*Overweight and obese dieters need more motivation*

Figure 89: Attitudes toward dieting, by BMI, July 2012

### **APPENDIX: OTHER USEFUL CONSUMER TABLES**

#### *Diet status*

Figure 90: Dieting status, by gender and age, July 2012

Figure 91: Diet status, by household income, July 2012

Figure 92: Diet status, by region, July 2012

#### *Body weight goals*

Figure 93: Body weight goals, by age, July 2012

Figure 94: Body weight goals, by region, July 2012

#### *Diet attributes*

Figure 95: Diet plan attributes sought, by age, July 2012

Figure 96: Diet plan attributes sought, by presence of children in household, July 2012

Figure 97: Diet plan attributes sought, by brands of diets, July 2012

Figure 98: Diet plan attributes sought, by brands of diets, July 2012 (continued)

#### *Diet information sources*

Figure 99: Diet information sources, by age, July 2012

Figure 100: Diet information sources, by household income, July 2012

Figure 101: Diet information sources, by region, July 2012

#### *Reasons to diet*

Figure 102: Reasons for dieting, by gender and age, July 2012

Figure 103: Reasons for dieting, by household income, July 2012

Figure 104: Reasons for dieting, by presence of children in household, July 2012

Figure 105: Reasons for dieting, by region, July 2012

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Diet Trends - US - November 2012

## Contents

### *Diet brands*

Figure 106: Brands of diets, by presence of children in household, July 2012

Figure 107: Brands of diets, by household income, July 2012

### *Attitudes toward dieting*

Figure 108: Attitudes toward dieting, by age, July 2012

Figure 109: Attitudes toward dieting, by region, July 2012

### **APPENDIX: TRADE ASSOCIATIONS**

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA: +44 (0)207 778 7151 | Brazil: 0800 095 9094

Americas: +1 (312) 943 5250 | APAC: +61 (0)2 8284 8100

**EMAIL:** [oxygen@mintel.com](mailto:oxygen@mintel.com)