



in|market insights report

Where Vegetarian-Leaning
Consumers Grub & Grocery Shop



Overview

In our previous inMarket inSights [report](#), we ranked the top five grocery chains based on vegetarian-leaning consumers' visitation patterns in 2018. We first identified shoppers who had purchased meat alternatives including Beyond Meat, Boca, Morningstar, and Quorn (amongst other brands) -- and then analyzed their grocery visitation patterns to uncover where this group over-indexes versus the U.S. baseline. What we initially uncovered was a pattern of mainstream grocery chains ranked as the top choices amongst consumers who buy meatless alternative products.

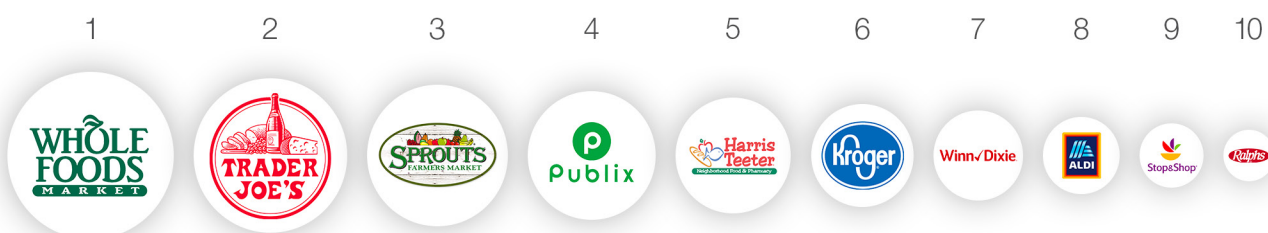
However, we've updated this report as more consumers increasingly demand healthier alternatives: with the announcement of Beyond Meat's IPO and Burger King rolling out [Impossible Whoppers](#) nationwide, it's clear that consumer preferences are evolving quickly. By analyzing real-time foot traffic patterns from millions of opted-in U.S. consumers, we are able to gain a granular and actionable perspective on changing QSR and fast casual trends, and guide marketers to connect with relevant audiences as trends shift.

In this updated and expanded report, we've ranked the top ten grocery chains and top twenty QSRs and fast casual restaurants for vegetarian leaning consumers during the period from March 2019 to May 2019 in order to reveal which businesses are most effectively taking advantage of this shift in demand.

For more info on methodology or to inquire about insights for your brand, [contact us](#) today.

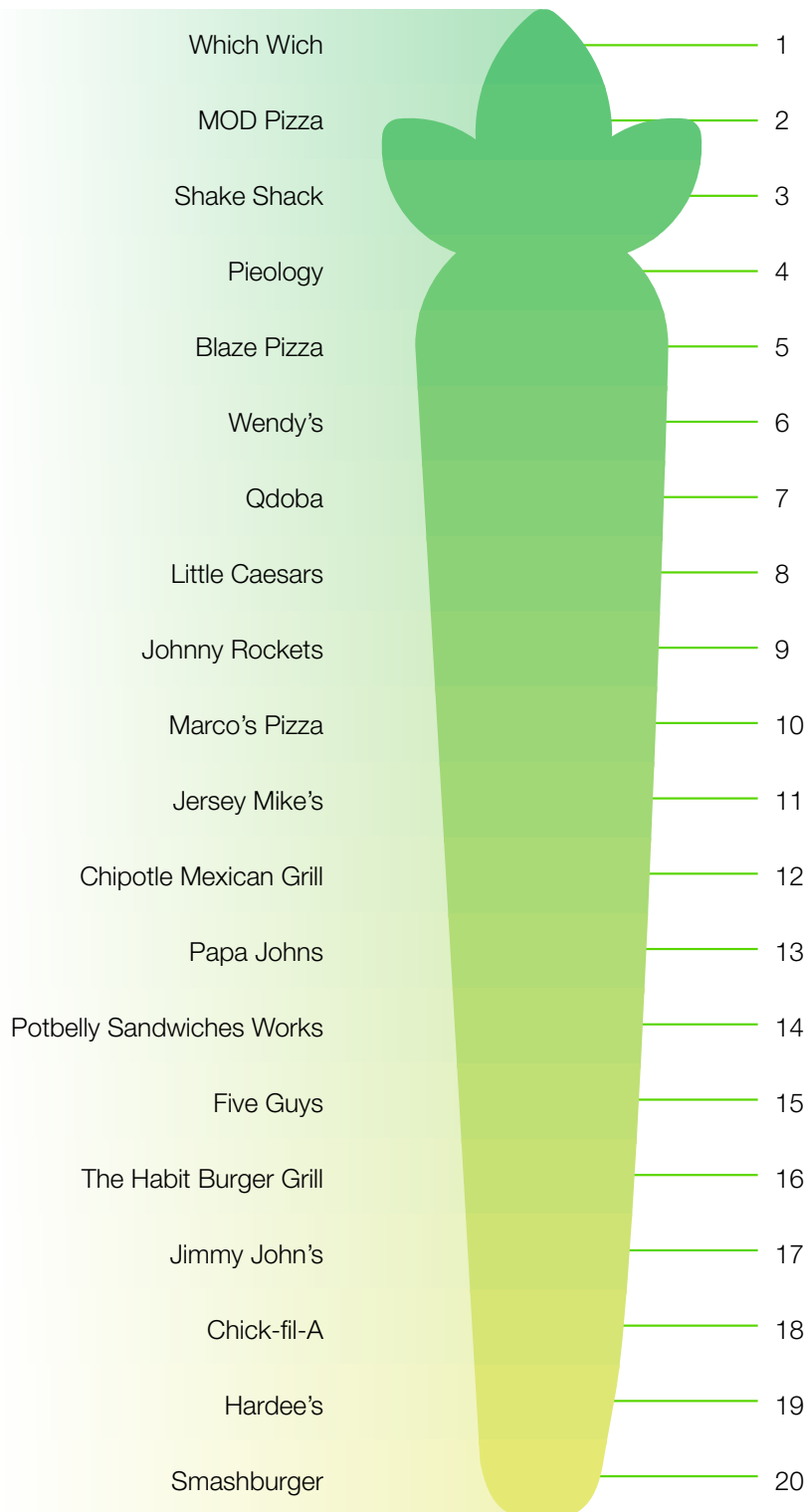
Top 10 Grocers for Buyers of Meat Alternative Products

Based on inMarket Purchase and Visitation Data



Top 20 QSRs and Fast Casual Restaurants for Buyers of Meat Alternative Products

We're hearing a lot about which chains might be next to introduce meat alternative menu items. Here's who should introduce these items based on highest percentage of vegetarian-leaning customers.



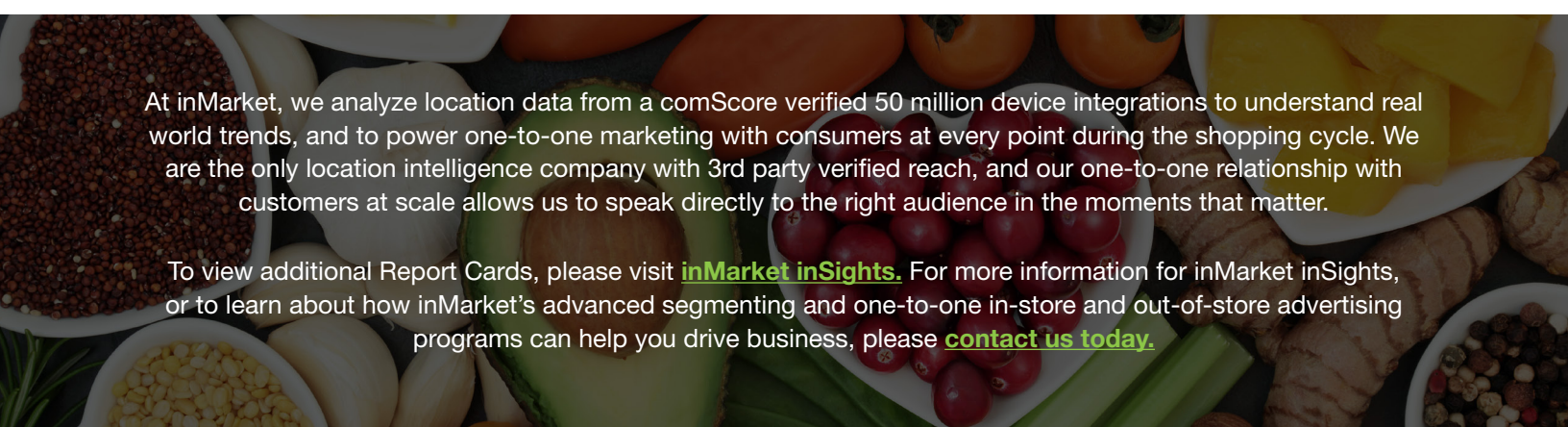
Key Takeaways

Grocers

- Specialty grocers like Whole Foods, Trader Joe's, and Sprouts have outpaced mainstream grocers, likely due to the fact that they offer a much more diverse array of vegetarian options than their mainstream counterparts as demand for meat alternatives increases. These specialty grocers also have historically focused on specialty food items like alternative healthier food items and vegetarian offerings -- which makes the top 3 grocery chains appealing to vegetarian-leaning shoppers.
- While the top 3 are made up of specialty grocers, a majority of the top 10 also include more traditional grocery chains. While vegetarian-leaning consumers over-index at specialty grocers, mainstream grocers are still appealing to this audience as they have expanded their vegetarian options to stay competitive -- the convenience of being able to buy specialty items without taking an extra trip to a specialty grocer is an attractive selling point to consumers.

QSRs and Fast Casual Restaurants

- Little Caesar's, which sits at #8 on the list, is currently testing the Impossible Supreme pizza which features the animal protein substitute from Impossible Foods, further cementing the trend towards meatless options. Also included are fast food Mexican joints, which is also makes sense considering Del Taco recently released their new meatless menu item, Beyond Tacos.
- 3 of the top 5 restaurants that meat alternative buyers go to are pizza joints. Pizza chains are most popular among customers who purchase meat alternative products, likely because a plain cheese pizza or a veggie supreme is, of course, vegetarian. MOD Pizza, one of the highest ranking fast casual eateries for vegetarian-leaning customers, also happens to be one of the [most-funded](#), having raised more than \$312 million thus far.
- Interestingly, we have three major sandwich chains and two Mexican food chains that over-index with vegetarian-leaning customers, which makes both categories a likely place for expansion of Impossible products.



At inMarket, we analyze location data from a comScore verified 50 million device integrations to understand real world trends, and to power one-to-one marketing with consumers at every point during the shopping cycle. We are the only location intelligence company with 3rd party verified reach, and our one-to-one relationship with customers at scale allows us to speak directly to the right audience in the moments that matter.

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