



hartman GROUP

Translating consumer behavior and food
culture into strategic growth opportunities

Capabilities & Services Overview 2023

Who We Are | Authorities on consumers. Students of culture. Passionate about food.



The Hartman Group is a food culture consultancy.

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients.

You can never fully understand why consumers are changing if you don't understand how the broader culture they live in is changing. Since 1989, The Hartman Group has been immersed in the study of American food and beverage culture while also keeping a finger on the pulse of the global ecosystem in which it operates.

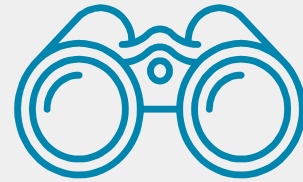
We are a team of social scientists, marketers and business professionals with deep industry experience and a passion for food. We have spent years challenging common assumptions about consumer culture with one goal in mind: your success.

What We Do | Unpack consumer culture to deliver marketplace advantage



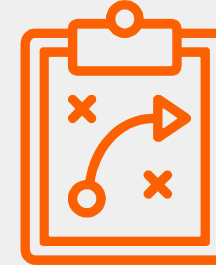
CONSUMER/SHOPPER INSIGHTS

We deploy anthropological and statistical techniques to understand the drivers behind how consumers make decisions about food, how they shop for food and how they consume food to provide you with nuanced and actionable insights to drive your business forward.



FORESIGHT AND TRENDS

The Hartman Group understands where and how cultural trends start, how to identify the sites of innovation and how to assess the likelihood of early trends gathering momentum. Our Cultural Analytics Framework, powered by our decades of primary qualitative and quantitative research, enables you to anticipate future demand and future threats to your portfolio, categories and brands.



STRATEGIC CONSULTING

Your biggest problem is our new favorite challenge. Our consulting engagements leverage our vast intellectual capital and your existing research/market data with a robust multidisciplinary analytical tool kit to uncover growth strategies that emanate from long-term structural changes in the food landscape and drivers of demand.



INNOVATION AND IDEATION

For innovation to ultimately succeed, it must be strategically-based, growth-oriented and evolve in step with consumer priorities and trends. Our process allows you to emerge with high-level strategic opportunity areas and concepts that are on-trend, differentiated and in alignment with your innovation and growth goals.

What We Do | Empower thought leadership and topical expertise

Hartman Syndicated Research integrates immersive ethnography and quantitative online surveys with our signature brand of cultural analysis.

We ground you in the latest consumer insights and trends, enabling you to be a thought leader in your organization and with your partners.

Topics for 2023:

- Health & Wellness
- Modern Beverage Culture
- Sustainability & Transparency
- Gen Alpha/Gen Z: The Future Food and Beverage Consumer

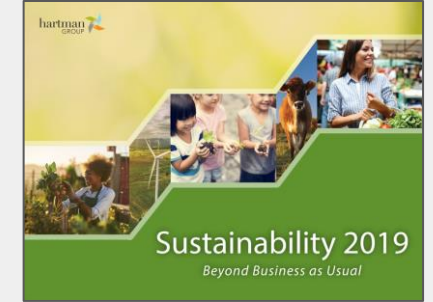
Health and Wellness



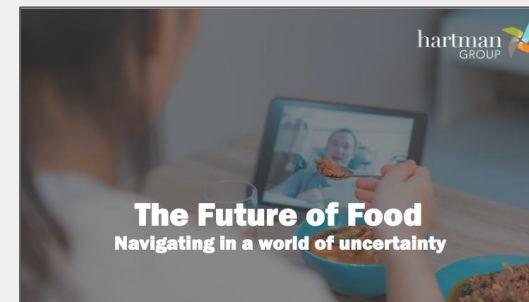
Organic and Natural



Sustainability



Food and Beverage Culture/Industry



Engaging with Hartman Group is easy as 1, 2, 3...



Hartman Retainer Partnership

On-demand strategic counsel and consulting on an array of topics, categories, and/or brands over a 12-month period



Custom Consulting/ Research Engagements

High-impact outcomes for your toughest business challenges



Syndicated Research Report/Bundle Purchase

Rich insight into a focused topic area(s)

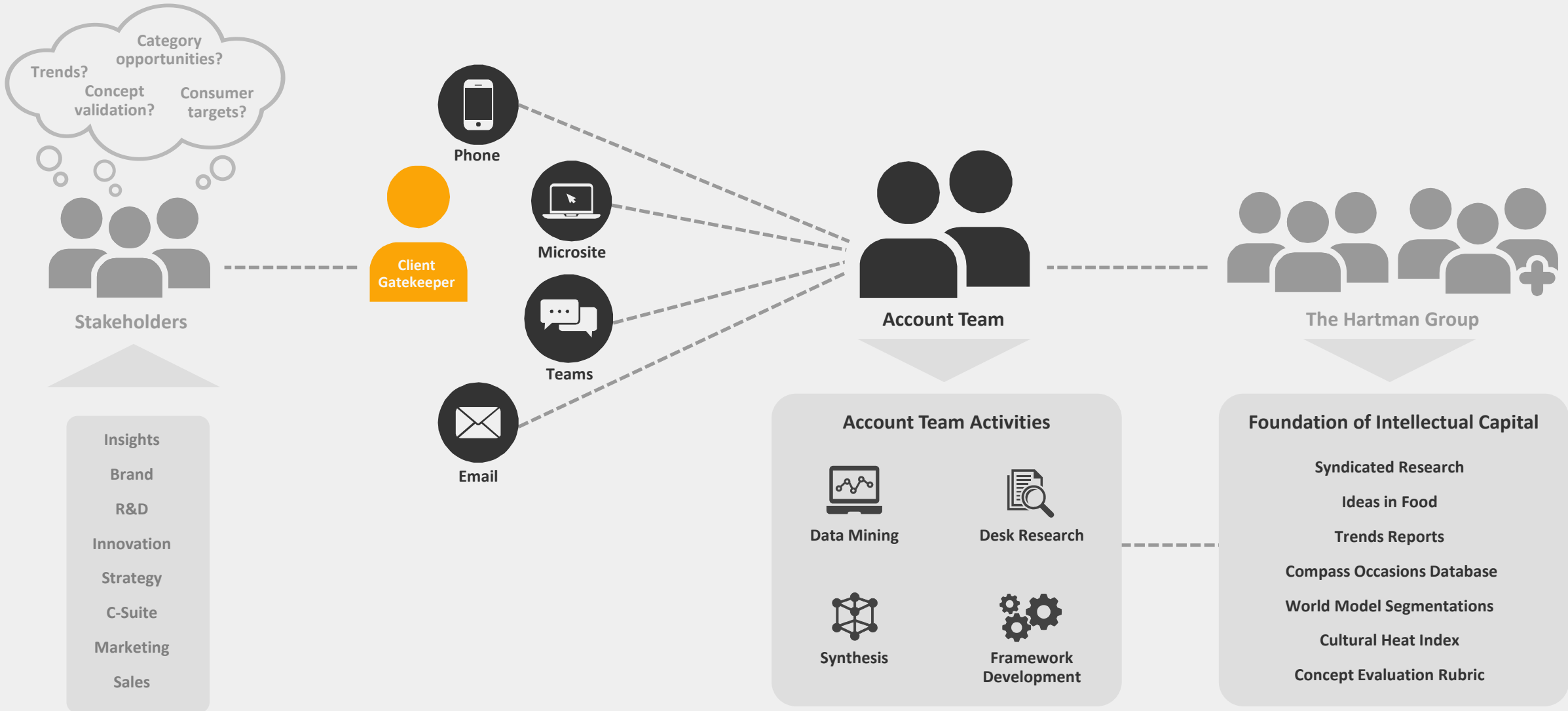
Hartman Retainer Services | The leading edge of F&B strategy

Hartman Retainer Services (HRS) Our clients do not have to do more with less. HRS gives you more - more Hartman Group consumer culture expertise, food and beverage culture foresight and trends, and access to proprietary intellectual capital – in a seamless partnership that dispenses with the hassle of multiple RFPs, re-introductions of team members, re-articulations of objectives and key initiatives, etc.

HRS learns about you, your partners and your competition, identifies what your teams need, and focuses on how best to be of service today, and tomorrow.

- Collaborative and independent
- Expert and consultative
- Pragmatic and creative

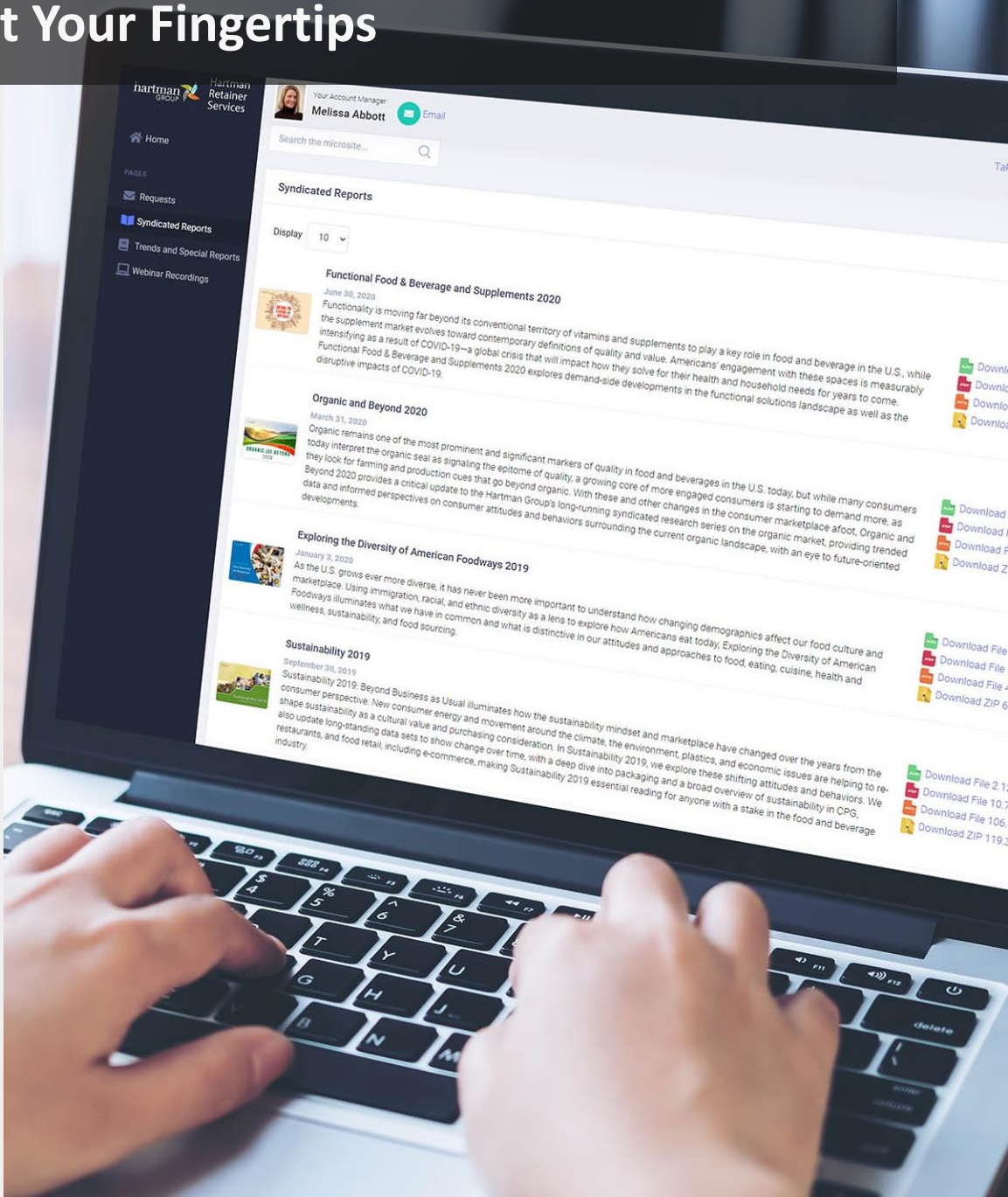




Hartman Retainer Services

A Wealth of Insights at Your Fingertips

Over 30 syndicated research reports (all food- and beverage-focused) and accompanying data tables and presentations are accessible via your **HRS microsite**, a fully searchable and secure site for your team.



The Hartman Eating Occasions Compass is a comprehensive database on American eating patterns, grounded in a complete enumeration of past-24-hour eating occasions. It has 9 years of data consisting of over 180,000 eating occasions. Each occasion contains the following information:

- **Who:** what person(s) was involved
- **When:** circumstance or time period (routine snack, holiday dinner)
- **Where:** the place of the consumption occasion (at home, office, on the go)
- **From Where:** channel used for sourcing
- **What:** the key needs relevant to the occasion
- **Why:** the emotional stakes of the occasion

Access to this database is provided via the Hartman Retainer Services consulting hours.

HRS clients receive annual eating and drinking occasion dashboards across the 8 dayparts which provide deep and rich information about the demographics, categories and needs during each daypart.

Dinner dashboard

WHAT THEY ATE/DRANK (INDEX)

Top Foods:	Top Beverages:
Vegetables, other than potatoes (21%) [264] Carrots (7%) [248] Broccoli (6%) [281] Onions (6%) [276] Tomatoes (5%) [220] Corn (4%) [289]	Water (30%) [138] Bottled water (still/unflavored) (11%) [126] Tap water (10%) [154] Filtered/Purified water (6%) [136] CSDs (22%) [151] Regular soda (14%) [152] Low calorie/Diet soda (5%) [142] Tea (12%) [133] Iced tea (11%) [151] Fresh brewed - NET (7%) [132] Fresh brewed, from bagged tea (6%) [144] Alcoholic beverage (11%) [212] Beer/Ale (6%) [202] Lager beer, domestic (4%) [219] Milk, dairy (8%) [90] Milk, excluding chocolate milk (5%) [96] 100% fruit juice/nectar (7%) [84] Coffee/Espresso (5%) [35] Lemonade (4%) [157] Juice drink (3%) [94]

SIZE OF PRIZE

80.2 B mouths per year

20.1% of total mouths

WHO SPECIFICS	%	INDEX
Alone	28%	60
Couple	33%	135
Family	33%	152
Friends	5%	86

SOCIAL CONNECTIONS	%	INDEX
Companions	40%	125
Caretakers	28%	116
Community	41%	128
Crafters	25%	101

CHANNEL WHERE FOOD WAS SOURCED - INDEX

1. Grocery Stores (55%) - 108	6. Natural (4%) - 111
2. Restaurant (28%) - 131	7. Dollar Stores (3%) - 67
3. Mass Merchandise (18%) - 93	8. Convenience Stores (3%) - 76
4. Super Centers (7%) - 94	9. Drug Stores (1%) - 84
5. Club Warehouse Stores (4%) - 94	

Source: Hartman Eating Occasions 2019 (n=3,993 adult eatings). BLUE font shows overindexing>120. RED font shows underindexing<80.

Dinner need states

SPECIFIC-NEED STATE*	%	INDEX
When FRESH, LESS PROCESSED is important, it's about... Short ingredient list	48%	117
When FRESH, LESS PROCESSED is important, it's about... All/100% natural	35%	85
When FLAVOR DISTINCTION is important, it's about... Regional American flavors, but really well done	23%	117
When FLAVOR DISTINCTION is important, it's about... Bold, exciting flavors	23%	116
When FLAVOR DISTINCTION is important, it's about... Authentic flavors from regions with distinctive food traditions	22%	121
When QUICK AND EASY is important, it's about... Very few dishes to clean up	35%	121
When QUICK AND EASY is important, it's about... Not many steps needed to prepare	34%	124
When QUICK AND EASY is important, it's about... Just add fresh meat or vegetables	14%	153
When QUICK AND EASY is important, it's about... Less than a couple of minutes prep	24%	115
When POSITIVE NUTRITION is important, it's about... Protein	61%	118
When POSITIVE NUTRITION is important, it's about... Fiber	30%	91
When POSITIVE NUTRITION is important, it's about... Omega 3, Omega 6	9%	118
When MODERATION is important, it's about... Total calories	34%	94
When MODERATION is important, it's about... Amount of fat	28%	110
When MODERATION is important, it's about... Amount of salt	24%	120
When SPECIAL HEALTH BENEFIT is important, it's about... Improving heart health	32%	109
When SPECIAL HEALTH BENEFIT is important, it's about... Lowering cholesterol	27%	100
When ABSENCE OF NEGATIVES is important, it's about... High fructose corn syrup	35%	100
When ABSENCE OF NEGATIVES is important, it's about... Sugar	34%	98
When ICONIC BRAND EXPERIENCE is important, it's about... Brands I keep coming back to	44%	97
When ICONIC BRAND EXPERIENCE is important, it's about... Brands I loved eating as a kid	27%	99
Additional GENERAL NEEDS	4%	235
Additional GENERAL NEEDS	13%	176

TOP NEED STATES
(% TOP-3 BOX CONSIDERATION)

76%	FRESH, LESS PROCESSED
73%	FLAVOR DISTINCTION
71%	QUICK AND EASY
63%	POSITIVE NUTRITION
60%	MODERATION
54%	SPECIAL HEALTH BENEFIT
51%	ABSENCE OF NEGATIVES
45%	ICONIC BRAND EXPERIENCE

Type of Consulting Request	What's Involved	Hours Required
<p>Quick Hartman POV: "Who does 'local' resonate with? What are consumers' definitions of local? Are there certain categories in which it is more important to be local?"</p>	<p>Fastest to complete. Based on existing syndicated studies tailored to client's question.</p> <p>For example, topics can include, natural + organic, health + wellness, and sustainability.</p>	<p>4-8 hours</p>
<p>Custom Data Pull and Analysis:</p> <ol style="list-style-type: none"> Quantitative data with qualitative POV: "What is the level of consumer demand for organic cheese (compared to other organic categories)? Are there unmet needs? (How can Company X position its products to better meet these needs?)" Trends Request: "What are key trends in the beverage marketplace today? What are some of the 'emerging' trends in more niche beverages that might affect the beverage marketplace in 3-5 years? What are emerging food trends that could apply to beverages in the future?" 	<p>Most requests fall into this category and typically require quantitative data manipulation plus a qualitative point of view. Trends research also falls into this category.</p>	<p>8-16 hours</p>
<p>Eating Occasions Request: "What is the Boomer Generation's perception of taste vs. health in breakfast foods? How does this compare with Millennials? Is there a relationship (shown with quantitative data) between prioritizing taste and health? Please elaborate for Boomers vs. Millennials."</p>	<p>Request requires extensive quantitative data mining and analysis, a qualitative point of view, and secondary research.</p>	<p>16-25 hours</p>
<p>Culture or Country Primer: "We are seeking an overview on the Hispanic consumer with information that analyzes: lifestyle, food culture, brand preferences, purchase decisions with coupons/deals, budgeting, and shopping trips."</p>	<p>An extensive deep dive into primary and secondary data, as well as mining of clients' data sources (e.g., Nielsen, Mintel, etc.).</p>	<p>25+ hours</p>

Flexible Engagement Models
to Meet Your Needs

If your organization needs...

- Strategic counsel and consulting on an array of topics, categories, and/or brands
- A breadth and/or depth of insights and wide accessibility
- Rich insights on a focused topic(s)

...consider...

- Full-suite HRS partnership
- Microsite access with syndicated research bundle
- Syndicated research bundle

If you have a time-bound objectives-driven project, The Hartman Group offers a multitude of custom research and consulting approaches outside of HRS that we would be happy to discuss with you.



**WE LOOK FORWARD TO
HELPING YOU UNLOCK
GROWTH.**



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