

Hartman Group Capabilities | 2025



In 1989, Hartman Group was founded on the belief that what consumers say does not always align with what they do

Our founder believed that understanding consumer demand was the best path forward for businesses in a society where consumers were increasingly empowered.

Hartman Group's interests have always followed consumer aspirations: from the Green Marketplace to a broader aim for health and wellness, and then the pursuit of sustainability. Our team of social scientists and business consultants remain authorities on consumers today.

- We are proudly woman-owned and led.
- We are students of culture at our core.
- And your success is what motivates us.





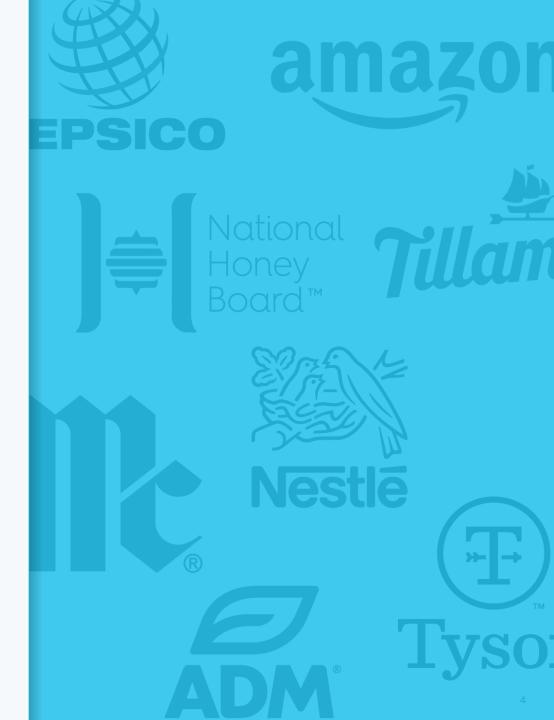
Hartman Group was built on a commitment to consumers, culture and clients

WE HAVE A SINGULAR MISSION:

Translate consumer behavior and food culture into strategic growth opportunities for our clients. Our passion for food is what fuels our purpose: **Helping others across the industry make an impact**

- CPG manufacturers
- Food/beverage retailers
- Foodservice organizations
- Ingredient suppliers
- Industry associations/ boards, NGOs

- Agriculture companies
- Food technology companies
- Media companies
- Packaging providers
- Academic institutions



Our superpowers make us a uniquely valuable partner



Identifying cultural shifts



Understanding food & beverage



Building empathy



Interpreting occasions



Unearthing opportunities



Creating insightful segmentations

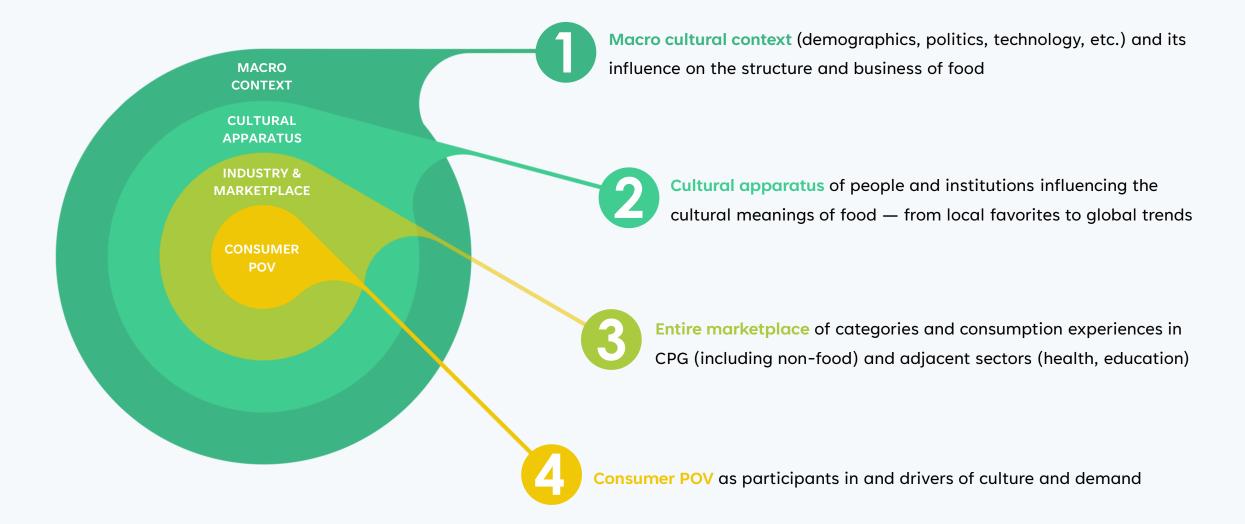
Being nimble

Serving clients

When you need expertise that is US-centric with global reach, you can rely on our 30+ years of experience in...



You can expect a cultural perspective, always considering...



Gain a holistic understanding of not only what consumers say and do, but how they feel



CONSUMER/SHOPPER INSIGHTS

Understand how and why consumers think about, shop for and consume food through trusted research techniques.





TRENDS AND INNOVATION

Discover opportunities that are ontrend, differentiated, and aligned with your growth goals by pinpointing where and how trends start.

STRATEGY

Develop growth strategies that emanate from long-term structural changes in the food landscape and drivers of demand.

Find the right fit with our flexible engagement options



HARTMAN RETAINER SERVICES

On-demand strategic consulting on an array of topics, categories, and/or brands with access to all Hartman Group intellectual capital



RE	

CUSTOM ENGAGEMENTS

Custom-designed engagements with discrete objectives and timelines to tackle your toughest business questions

REPORTS

Robust primary quantitative and qualitative research with rich insight into a focused topic area(s)

Our solutions are tailored to meet your needs, no matter how complex

Hartman Retainer Services: Ongoing access to experts and knowledge

Gone are the hassles of re-introductions of team members and re-articulations of objectives. Hartman Retainer Services clients have ongoing access to our dedicated team of consumer culture experts and our robust knowledge library.

Hours of efficient, strategic guidance

Packages starting at 50 hours for engagements like:

- Data mining and deep dive reports
- Innovation and strategy
- Trend identification and implications
- Occasion-based insights and strategies
- Identifying "white spaces"
- Concept evaluation
- Global insights

Retainer Services packages typically include:

New IC to build your knowledge base

- All Hartman Group syndicated research reports
- Presentations and webinars available to your entire organization
- Annual Compass Eating & Drinking Occasions Landscape report and dashboards

Database access for turnkey insights

- Unlimited users for searchable microsite housing all syndicated studies, white papers and reports
- Mining of Hartman Group's Compass Eating & Drinking Occasions Database

Compass Eating and Drinking Occasions Database

Compass reveals disruptive market opportunities through foundational data and insights about the basics of eating and drinking in America. Our powerful online recall methodology randomly selects two eating or drinking occasions a participant has had in the past 24 hours, allowing us to access consumers very close to their eating occasions for optimal accuracy.

Access includes dashboards of data points and insights on:

300+ food and beverage categories (including alcohol)

- 8 major dayparts and 4 major locations
- Person(s) involved (alone, couple, family, friends, child-centric)
- Shopping incidence for 40+ national and regional retailers
- Sourcing from 25 major national food service chains

			nection							
SELECT HIGH-LEVEL NEED STATES			SELECT SPECIFIC-NEED STATES* When the high level need is a consideration, IC along.	ADDITIONAL GENERAL NEEDS*						
(% Top	-3 box considerations)	76	Index			*	Index	OTHER HIGH-LEVEL NEED STATES		Index
700	Simple, real ingredients	83%	105	700	Short legradant list	42%	114	(% Top-3 box considerations)		
				100	No genetically modified organisms & GMOs	18%	110	Scratch made with no short cuts	64%	115
T Not nee	Not needing time or	815	347	0	Not many steps needed to prepare	33%	340			++2
	energy	***	344		Very few dohes to clean up.	88%	128	Tending to reads of others	675	228
10	Better Revor	80%	109	88	Authentic flavors/fueds from regions and countries with distinctive fued traditions	29%	119	Entrying local/seasonal food	62%	109
					Bold, exciting flavors	19%	118	Connecting socially with others		
Ð	Positive nutrition	71%	104	27	Protaily	57%	117	through food/drink.	81N	113
				op	Omega 5, Omega 6	#15	101	Authentic global flavors	34%	114
CD				ch	Portion size	22%	109			
	Moderation 65		301	6	Amount of salt	21%	115	IMPORTANT FOOD/BEVERAGE ATTRIBUTES	35	Index
				00	improving heart health	29%	101	Retheated	285	143
	Special health benefit	63%	100	8	Lowering cholesteral	29%	106	Would help me relax/unwind	19%	128
\triangle .	Absence of negatives	59%	101	- 10	No genetically modified ingredients	22%	512		-	
				41	MIG	21%	125	I wanted something different to eat	15%	139
_					Branch I came to love once I grew up	27%	101	Something other than the usual flasters	18%	255
	Iconic brand experience	54%	06 85	(14)	Rearch and "discourt" in the base	-	117	Something other than the usual testures	-	128

	r occasions are the most si rant, with a facus on socio				more ofter	n tokin	g place	with fa	mily or as a couple, a	ta		OCCAS	NNER	
Q	SIZE OF PRIZE	848	WHO WAS	*	index.		WHERE IT TOOK PLACE		index					
	63.3 B Mouths per year				Alone	27%	62		Hone	825	307	CHANNELS WHERE FO BEVERAGES WERE SC		
	20% Of total mo				Couple	34%	184		At work/School	2%	24	BEVERAGES WEI Among occasions no		
	20% Of total mouths				Family	32%	140		Restaurant	12%	146			
	EMOTIONAL CONTEXT:		Index		Friends	5%	74		Other away from home	3%	66			
Q,	Top Feelings	8			WHAT WAS CON			& CONSUMED				f 🖬	-	
3	Two just hungry	42%		108	TOP FOOD				TOP BEVERAGE			□ ò_		
	I wanted some food that would delight me	20%	112	é	CATEGORIES		- 56	Index	CATEGORIES	×	index .	TOP SOURCES		
	I wanted to enjoy some really				Meat cuts (re seafood)	schutling	29%	243	Water	25%	191	on food setaler	72%	
	good food with someone I care about	19%	147		Vegetables, o	the the	1 205	-	Carbonated soft	185	147	Bestaurant	20%	
	I needed to eat/drink and wanted something	14%	302		potatoes Broads/broad-like				drink/Soda/Pop			Work Another person	5%	
	wanted something mood/healthy	24%			products.		183	121	Icad Tea	10%	150	Online-only service	25	
	I seas just eating out of habit	11%	87		Chesse		165	125	Alcoholic beverage (asked if 21+)	9 %	388	TOP FOOD		
	Fiwas titled	11%	181		Picca/Pasta/I		241	199	100% fruit juice/necta	6%	68	RETAILERS	.5	
	I was just thirsty	85	77		Potatoes		131	225	Coffee	4%	44	Gracery	69%	
	Primarily focused on connecting		145		Salads		125	211	Juice drink	25	89	Mass Merchandise Dollar (Discover)	28%	
	with someone I care about	an 10			Rice and othe	er starch	ei 105	250	Chocolate milk	25	56	Dollar/Decount Club	7% 6%	
	I revealed sumething to replenish/restore after physical 75		PN 101		Hamburger/ Cheeseburger		9%	187	Milk, plain	3%	88	Natural/Speciality	65	
	activity				Bears/Lantils	Aces		188	Lemonade	85	234			

What makes up an eating occasion?

- Who: what person(s) was involved
- When: circumstance or time period (routine snack, family 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



Compass access is included in all Hartman Retainer Services partnerships and can also be leveraged via custom engagements.

13+ years of data 215,000+ 52,000+

Adult eating occasions

Child eating occasions

Custom engagements: Time- and objective-specific project design and strategy

As a small agency, ingenuity is our specialty. We get to the heart of your question with unbeatable clarity by taking human approaches to complex challenges, leveraging a range of solutions to fit your goals and resource requirements.

Tailored solutions that reveal:

Consumer/shopper driven insights

- Custom quantitative research: segmentation, A&U, occasion-based surveys
- Custom qualitative research: consumer ethnography, retail/category immersion, experience design, in-situ expert and cultural informant engagement
- Mining of Hartman Group's intellectual capital: syndicated studies; Compass Eating & Drinking Occasions Database

Culturally-relevant trends and innovation

- Trends frameworks and experiences (treks, artifact stations)
- Innovation platforms
- Ideation
- Concept testing

Future strategy

- Portfolio
- Category
- Brand
- Marketing & Communications

Primary research expertise



Qualitative

True consumer empathy comes from immersion: being in their homes; shopping with them; dining with them. Effectively leveraging cutting-edge ethnographic research tools helps surface insights from real life.

- Explore uncharted territories
- Understand unarticulated motivations
- Uncover richness
- Draw connections
- Reveal patterns
- Identify needs



Quantitative

A robust quantitative foundation helps you better understand trends and growth opportunities by answering questions about consumers, competitors and markets.

- Identify unmet demand
- Track changes in behavior
- Segment consumer targets
- Extend prior research
- Rank/prioritize opportunities
- Decide where to focus

Reports: On-demand access to insights

Our deep library of syndicated data fuels everything we do, benefitting you no matter how we work together. Our reports are designed to spark strategic thinking and make your organization smarter — without the financial or time investments of larger-scale custom research.

We conduct at least four syndicated studies annually, plus many other data-rich publications throughout the year.

A cost-effective way to stay on the leading edge:

Syndicated reports

By leveraging both ethnographic immersion and quantitative surveys, these reports help you deeply understand the current market as well as specific topical areas.

Trend reports

Deep dives into current and emerging trends across the marketplace, providing cultural context and detailing the "why" behind consumer, category and channel trends. **Occasions reports**

Comprehensive analysis of the current eating/drinking landscape, with over a decade of data on specific dynamics like sourcing, category, daypart, and more.

Recent and upcoming syndicated reports

2025 study lineup



Q1 | Health & Wellness: The Interplay of Vitality & Longevity



Q2 | Food Sourcing in America: Fabrication & Focus

Q3 | Sustainability in Action: Consumer Priorities & Realities



Q4 | Food & Technology: Insights for Innovation & Impact

Other recent publications



Eating & Drinking Occasions Landscape 2024: Underlying Currents of Change



Ideas in Food 2025 trend report



Premiumization & Everyday Values 2025: Prioritization of Personal Relevance

Visit the Report Store

Finding your path forward...

Let's connect to see how we can draw on our unique approaches and tools to align on a partnership suited to your priorities and budget.

Please reach out anytime: shelley@hartman-group.com



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