

# 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.





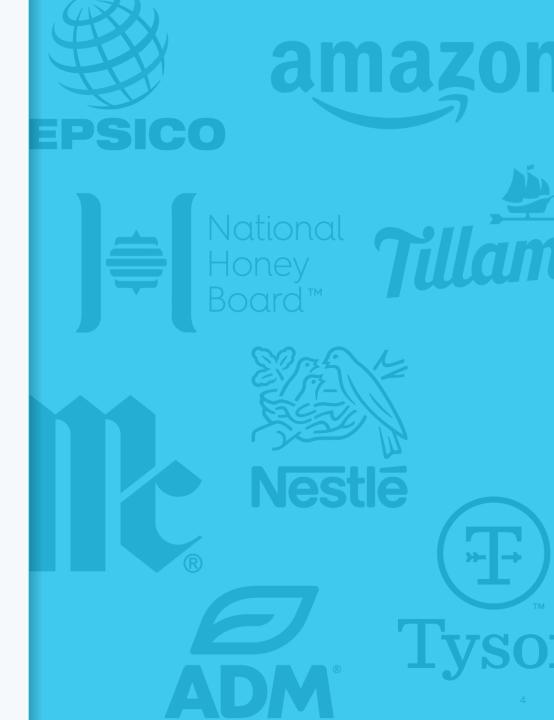
# Hartman Group was built on a commitment to consumers, culture and clients

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

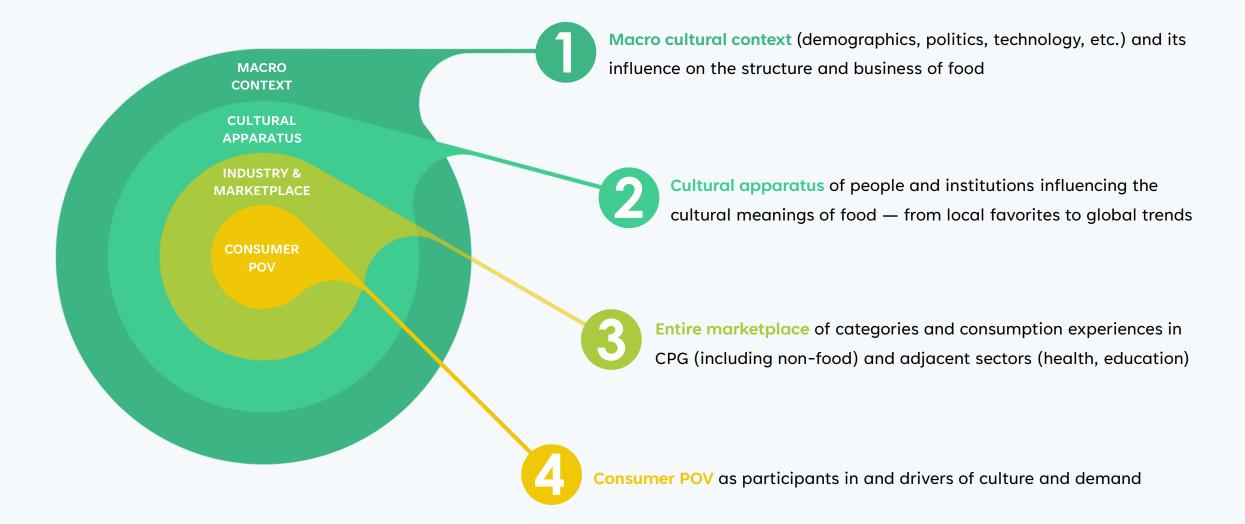
Being nimble

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<br>NEED STATES |                          |     | SELECT SPECIFIC-NEED STATES*<br>When the high level need is a consideration,<br>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<br>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<br>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<br>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<br>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<br>BEVERAGES WERE SC |          |  |
|    | 20% Of total mo  |       |         |     | Couple                        | 34%       | 184                 |            | At work/School                       | 2%         | 24      | BEVERAGES WEI<br>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<br>would delight me                    | 20%   | 112     | é   | CATEGORIES                    |           | - 56                | Index      | CATEGORIES                           | ×          | index . | TOP SOURCES                            |          |  |
|    | I wanted to enjoy some really                                  |       |         |     | Meat cuts (re<br>seafood)     | schutling | 29%                 | 243        | Water                                | 25%        | 191     | on food setaler                        | 72%      |  |
|    | good food with someone<br>I care about                         | 19%   | 147     |     | Vegetables, o                 | the the   | 1 205               | -          | Carbonated soft                      | 185        | 147     | Bestaurant                             | 20%      |  |
|    | I needed to eat/drink and<br>wanted something                  | 14%   | 302     |     | potatoes<br>Broads/broad-like |           |                     |            | drink/Soda/Pop                       |            |         | Work<br>Another person                 | 5%       |  |
|    | wanted something<br>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<br>(asked if 21+) | <b>9</b> % | 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<br>Dollar (Discover)  | 28%      |  |
|    | with someone I care about                                      | an 10 |         |     | Rice and othe                 | er starch | ei 105              | 250        | Chocolate milk                       | 25         | 56      | Dollar/Decount<br>Club                 | 7%<br>6% |  |
|    | I revealed sumething to<br>replenish/restore after physical 75 |       | PN 101  |     | Hamburger/<br>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: <a href="mailto:shelley@hartman-group.com">shelley@hartman-group.com</a>



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