Food Shopping in America 2017

THE HARTMAN GROUP'S ONGOING SERIES OF SYNDICATED STUDIES ON CONSUMERS' SHOPPING BEHAVIORS AND TRENDS

AS LEADERS IN THE STUDY OF AMERICAN FOOD CULTURE, The Hartman Group has been tracking how Americans shop for food since the 1990s. From one-stop shopping to multichannel shopping to online markets and click-and-collect, we continue to track consumers' evolving perceptions, needs, habits and relationships with food retailers.

The **Food Shopping in America 2017** syndicated study applies The Hartman Group's innovative approach to answer the question: with more options than ever before, including an expanding array of online food retailers, how do consumers shop for food today? With competition for consumers' food dollars and eating occasions so fierce, what can food and beverage retailers do to attract and retain shoppers?

New to the 2017 study will be a special section on the expansion of the discount grocery channel, the emerging fresh-format channel and smaller-footprint retail formats. It will provide insight into how consumers distinguish between and judge retailers' effectiveness at meeting their needs in an era of blurring channel boundaries. What are these new channels solving for, and what can traditional retailers do to address the changing market landscape?

The outcome of the study will illuminate emerging opportunities for retailers across the spectrum of the food and beverage space, as well as for CPG food and beverage manufacturers and any business with a stake in the food and beverage retail market.

The study will offer a comprehensive understanding of shopping behavior at the broad level of landscape and culture, as well as at the level of channel and retailer, including:

- Grocery (e.g., Kroger, Safeway, Ahold-Delhaize)
- Mass discount (e.g., Walmart, Target)
- Club (e.g., Costco, Sam's Club)
- Drugstores (e.g., Walgreens, CVS)
- Natural/specialty/fresh format (e.g., Whole Foods, Trader Joe's, Sprouts, The Fresh Market)
- Dollar stores and discounters (e.g., ALDI, Dollar General, Family Dollar, Save-A-Lot)
- Online (e.g., online-only retailers, meal kit deliveries, grocery delivery, click-and-collect and online arms of brick-and-mortar retailers)

TIMELINE

This study will field in Q2, 2017, with a final report delivered at the close of the quarter.

UNIQUE PARTICIPATION OPPORTUNITIES

Through a syndicated study, you will obtain a significant amount of data, insights and strategic analysis at a fraction of the cost of underwriting an independent custom research study.

METHODOLOGY

- Integrated quantitative and qualitative ethnography online survey.
- Quantitative: a nationally representative online survey of minimum n=1,500 U.S. adult primary household shoppers aged 18 to 70 with readable samples of standard demographics, such as gender, ethnicity, socioeconomic status and generational cohorts.
- Qualitative: a combination of in-person and virtual ethnographies with primary household grocery consumers representing key demographics and segments.

FINAL DELIVERABLE

- In-depth report (in PowerPoint format) of overall findings, including executive summary, implications, recommendations and complete analyses with trended-data comparisons to previous studies (where relevant), supported by full-color charts and visuals.
- Accompanying the general report will be a supplemental set of data tables (Excel format) with a breakdown of key demographics.

PARTICIPATION COSTS

- **Before April 30, 2017: $12,500**
- After April 30, 2017: $15,000
- Customization options (oversampling, proprietary questions, special data runs, etc.) are available to a limited number of study participants. *They are handled on a first-come, first-served basis. Please contact us for quote.*

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STUDY BACKGROUND

The Hartman Group has been tracking consumer food shopping behavior for many years. **Food Shopping in America 2017** provides a snapshot of today's shoppers and will update and extend The Hartman Group's previous work, including 2014's Food Shopping in America and 2012's Shopping Topography and The Online Grocery Shopper.

Food Shopping in America 2017 uses The Hartman Group's innovative research techniques to explore these issues. Combining in-depth ethnographic consumer immersions and shop-alongs with the strength of a robust quantitative study, we are able to go deeper than the typical performance ratings and satisfaction scores to uncover the principal drivers responsible for consumers' perceptions and behaviors. We are able to probe on contradictions, explore trade-off behaviors and observe consumers' everyday environments.

Food Shopping in America 2017 will provide a detailed analysis of the contemporary shopping landscape, providing key insights into how consumers have changed (or not) in their shopping behaviors and attitudes, and will identify the trends that will likely shape the future of the food and beverage marketplace.

Key topic areas of examination include:

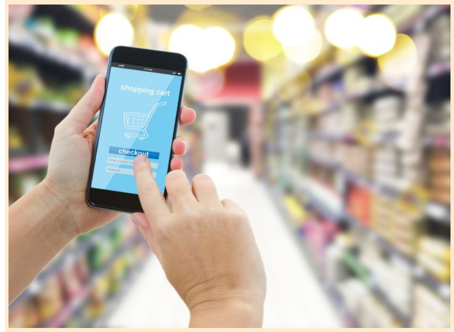
- Basic shopping habits (e.g., trips per week, retailers per trip)
- Cultural context and shopping trip dynamics — language, attitudes, planning, shopping strategies and barriers
- Retailer/channel engagement, perceptions and performance
- Purchase influencers and trip drivers
- Online vs offline shopping and shoppers
- Emerging formats and channels
- Demographic differences and similarities

The study also covers topics based on sponsorship input, which are complemented by The Hartman Group's experience in the food and beverage shopper insight space.

Final Report Deliverable

The final deliverable will be a high-impact PowerPoint report focusing on the study objectives and research questions. The report will include an executive summary, detailed findings and resulting implications along with strategic recommendations. Supplemental data tables will also be provided.

Culture Change: What Changes Are in Store in 2017?



Channel blurring, digital technology and heightened awareness of the health and environmental consequences of food have forever changed the way consumers think and behave.

Fueled by new knowledge and aspirations, shoppers are now seeking new experiences, better-quality offerings and closer connections with the food they eat. With so many options and conflicting information available, they are also looking to food retailers and manufacturers for guidance.

Source: Food Shopping in America 2014 report, The Hartman Group

ISSUES EXPLORED

Food Shopping in America 2017 will probe on topics that allow us to identify patterns, trends and divergences from a high quantitative level down to rich ethnographic detail. Where available, insights will be tracked over time. Areas of examination include:

Grocery Shopping in Cultural Context

- Changing consumer demographics
- New and emerging formats
- Diversifying online options
- The pursuit of value — in multiple forms

Grocery Shopping Landscape

- General shopping behaviors and habits
- Grocery-shopping occasions
- Interaction with marketing messages
- Trip drivers and purchase influencers

Channel Perceptions and Performance

- Channel engagement, performance, strengths and weaknesses
- Category shopping and performance
- Channel profiles:
  - Traditional channels (grocery, mass, drug, club)
  - Dollar and discount channel
  - Fresh-format and small-footprint channels
  - Online meal kit delivery

Retailer Perceptions and Performance

- Retailer engagement, performance, strengths and weaknesses
  - We expect to profile a select number of national retailers, including Kroger, Ahold-Delhaize, Safeway/Albertsons, Whole Foods Market, ALDI, Trader Joe's, Walmart, Target, Costco, Sam's Club, Walgreens, and CVS.
  - If your company is interested in being included, please contact us for feasibility and a quote.
- Product assortment/category performance
- Trust, loyalty and satisfaction
- Shopper profiles
- Cross-shopping

Millennial Shoppers: What Changes Are in Store in 2017?

With more money and time constraints than previous generations, Millennials approach grocery shopping differently.

Although they are less likely to plan than other shoppers, Millennials remain engaged and connected when they shop, relying heavily on digital and mobile technology.

Millennials are active and connected shoppers — most (70%) use their mobile devices while shopping, providing retailers an opportunity to connect with them via m-commerce.

Source: Food Shopping in America 2014 report, The Hartman Group

Food Shopping in America 2017 Syndicated Study Participation Form

To underwrite participation in the Food Shopping in America 2017 syndicated study, please fill out the form below and return by email or fax to:

Blaine Becker
Senior Director of Marketing
f: 425.452.9092
e: blaine@hartman-group.com

Cost

☐ **General report, before April 30, 2017: $12,500**

☐ General report, after April 30, 2017: $15,000

☐ Customization options: Contact us for quote (deadline is March 20, 2017)

Terms: Due upon receipt of invoice

Name ____________________

Title ____________________

Company ____________________

Address ____________________

City / State / Zip ____________________

Phone ____________________

Email ____________________

Signature ____________________

Date Signed ____________________

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