

Health + Wellness 2017

The Journey Continues

THE HARTMAN GROUP'S ONGOING SERIES OF SYNDICATED STUDIES ON THE HEALTH & WELLNESS CONSUMER AND MARKETPLACE

The Hartman Group has been leading the study of health and wellness since the early 1990s. Over decades of mapping consumers' evolving views, aspirations and adoptions, we have become undisputed experts in the field through our unique combination of quantitative rigor and rich ethnographic detail.

The **Health + Wellness 2017** syndicated study will apply our innovative approach to continue our exploration of health and wellness in the U.S. market and culture at large. The research will identify the factors and trends driving demand for healthy foods and beverages as well as other wellness products and services.

The outcome of the study will illuminate emerging opportunities for CPG food and beverage manufacturers, food retailers, food service companies and restaurants, and companies with a stake in the wellness market.

The Hartman Group's series of health and wellness syndicated studies is the longest-running consumer-centric study of the U.S. wellness marketplace and provides current, comprehensive insight into underlying motivations and behaviors for how and why consumers live, shop and use brands, products and services in the health and wellness space.

Health + Wellness 2017 will update and extend The Hartman Group's previous work, showing changing attitudes, behaviors and emerging trends. We will also apply our signature "ahead-of-the-curve" thinking for marketing health and wellness solutions to consumers with our inclusive focus on trendsetters, early adopters and more mainstream consumers. **The study will deliver a culturally based big-picture assessment of where health and wellness is today, where it is headed and what it means for your business.**

Timeline

This study will field in Q1, 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 qualitative ethnography and quantitative online survey.
- Quantitative: nationally representative online survey of minimum n=1,500 U.S. adult primary household shoppers aged 18 to 84. Readable samples of World of Wellness segments and standard demographics, such as gender, ethnicity and generational cohorts (including older consumers aged 71 to 84).
- Qualitative: a combination of in-person and virtual ethnographies with wellness 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 Dec. 30, 2016: \$12,500**
- After Dec. 30, 2016: \$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.**

STUDY BACKGROUND

From the beginning, the intent of The Hartman Group's Health + Wellness series of syndicated studies has been to provide timely, comprehensive data, insights and trends that track changes in consumers' understanding of the meanings of health and wellness, integration into their lifestyles and purchase behaviors across a range of categories and retail channels.

Health + Wellness 2017 combines the strength of a robust quantitative study with in-depth ethnographic consumer immersions. This integrated approach allows us to go beyond the usual listing of motivators and barriers to uncover the principal drivers responsible for moving consumers along the adoption path in the World of Wellness. It also allows us to probe on differences in aspirations and actions, and how wellness attitudes play out in consumers' everyday environments.

Health + Wellness 2017 will be a comprehensive examination and detailed analysis of the contemporary wellness landscape, providing key insights into how consumers have changed (or not), and will identify the trends that will likely shape the future of health and wellness lifestyles and the marketplace.

Key topic areas of examination include:

- Cultural views and definitions of health and wellness
- Health and wellness attitudes, behaviors, goals and barriers
- Health conditions and treatments
- Information sources and adoption pathways
- Food, beverage and ingredient trends
- Diet, nutrition and approaches to eating
- Shopping for wellness products and services
- Attitudes toward governmental regulation, health care and public health issues
- Demographic differences and similarities

The study also covers topics based on sponsorship input, which are complemented by The Hartman Group's experience in the health and wellness 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.

BUILDING BLOCKS OF THE HEALTH + WELLNESS JOURNEY.

Beginnings

Did parents teach good habits?



Catalysts and Triggers

What happened to change H+W philosophies over time?



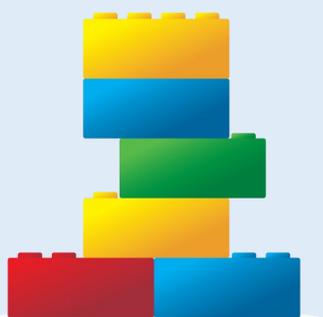
H+W Approach

How do consumers approach H+W as they gain knowledge or life experience?



Daily Practices and Obstacles

How does H+W actually play out in daily life?



Source: Health & Wellness 2015 report,
The Hartman Group

ISSUES EXPLORED

Health + Wellness 2017 will probe on topics that allow us to follow and identify the common threads and patterns that direct consumers in their journeys within the health and wellness marketplace. Increasingly, these common threads and patterns have as much to do with lifestyle and consumption practices as they have to do with easily identifiable consumer needs.

Areas of examination (many tracked over time) include:

The World of Health + Wellness

- Purchase criteria
- Evolution of the wellness consumer, with updated segment profiles (Core, Mid-level, Periphery)
- Motivations and barriers
- Adoption pathway
- Triggers
- Information sources
- Barriers to participation and evolution
- Attitudes toward governmental regulations and public health approaches
- Satisfaction with current health care and expectations for the future

Living in a Health + Wellness Culture

- The meaning of health and wellness
- Health and wellness conditions and treatments
- Attitudes and assessment about one's own health and wellness
- Approach to treatment: reactive vs. proactive
- Ingredient concerns and dietary practices
- Converting knowledge into practice
- Generational distinctions

Wellness Food and Beverage Trends

- Trending out (avoiding) and trending in (adding)
- Products
- Ingredients
- Categories

Shopping for Health + Wellness

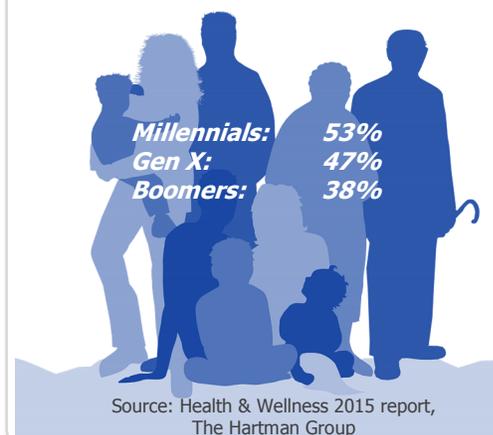
- Channel analysis
- Health and wellness at retail
- Health and wellness at food service/restaurants
- Trends in wellness products and categories

EVOLUTION IN WELLNESS VIEWS

In 2015...

44%

of consumers said they changed their health + wellness views in the past few years.



HEALTH + WELLNESS 2017 syndicated study participation form

To underwrite participation in the Health & Wellness 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 Dec. 30, 2016: \$12,500
- General report, after Dec. 30, 2016: \$15,000
- Customization options: Contact us for quote (deadline is Dec. 15, 2016)

Terms: Due upon receipt of invoice

Name	_____
Title	_____
Company	_____
Address	_____
City / State / Zip	_____
Phone	_____
Email	_____
Signature	_____
Date Signed	_____

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