

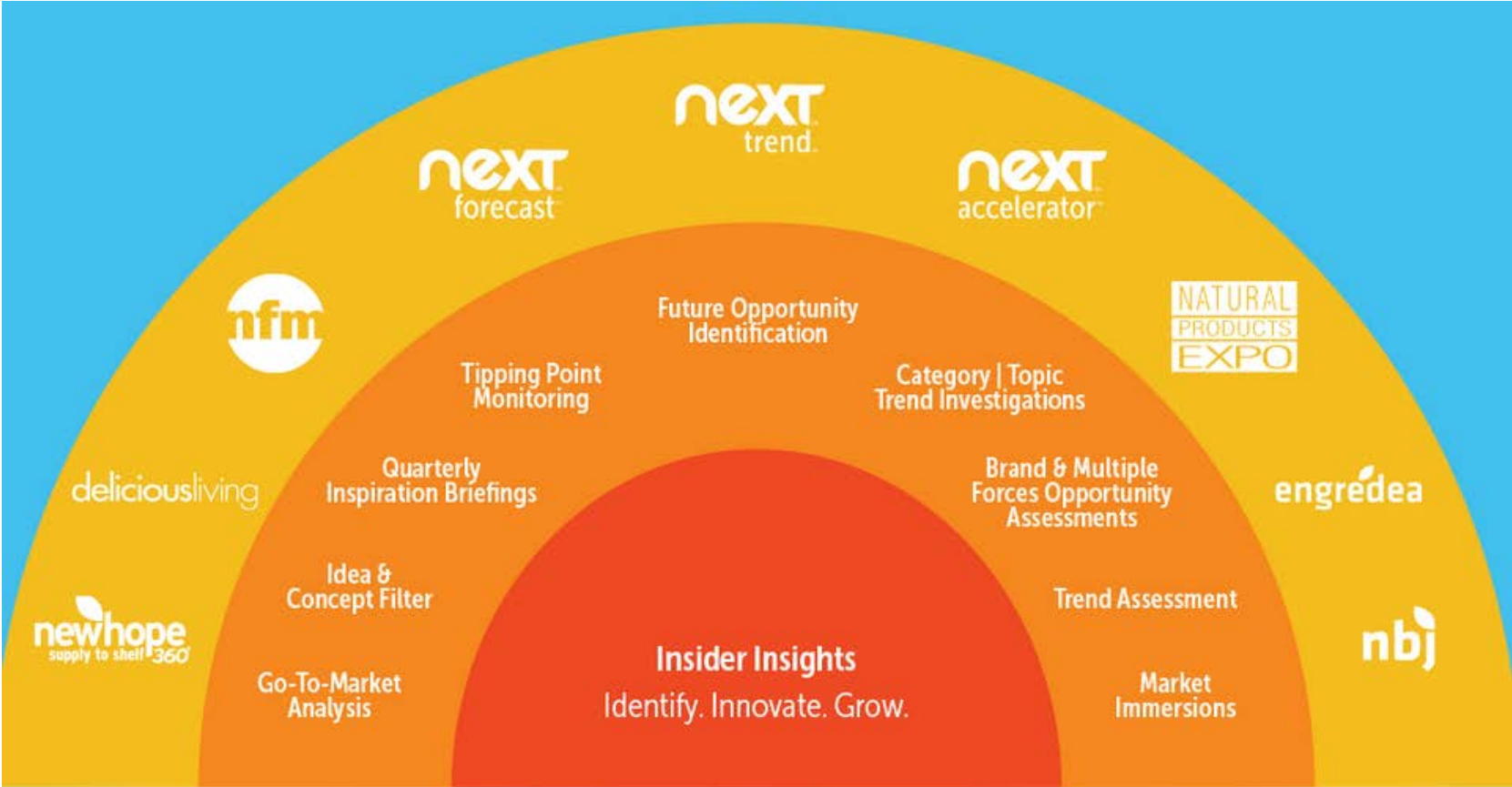


How Food Tribes Are Redefining Food

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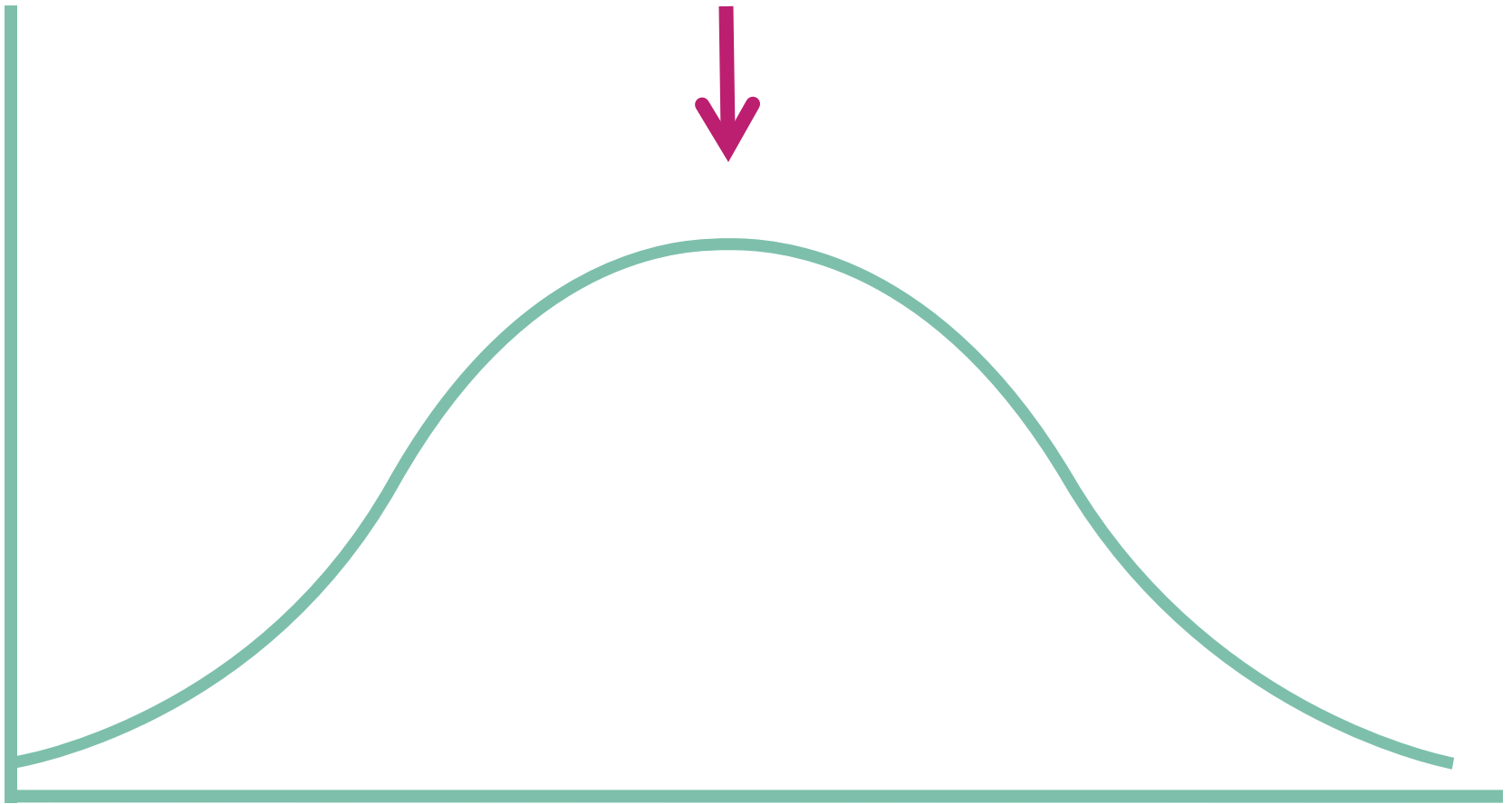
What's NEXT

Passion



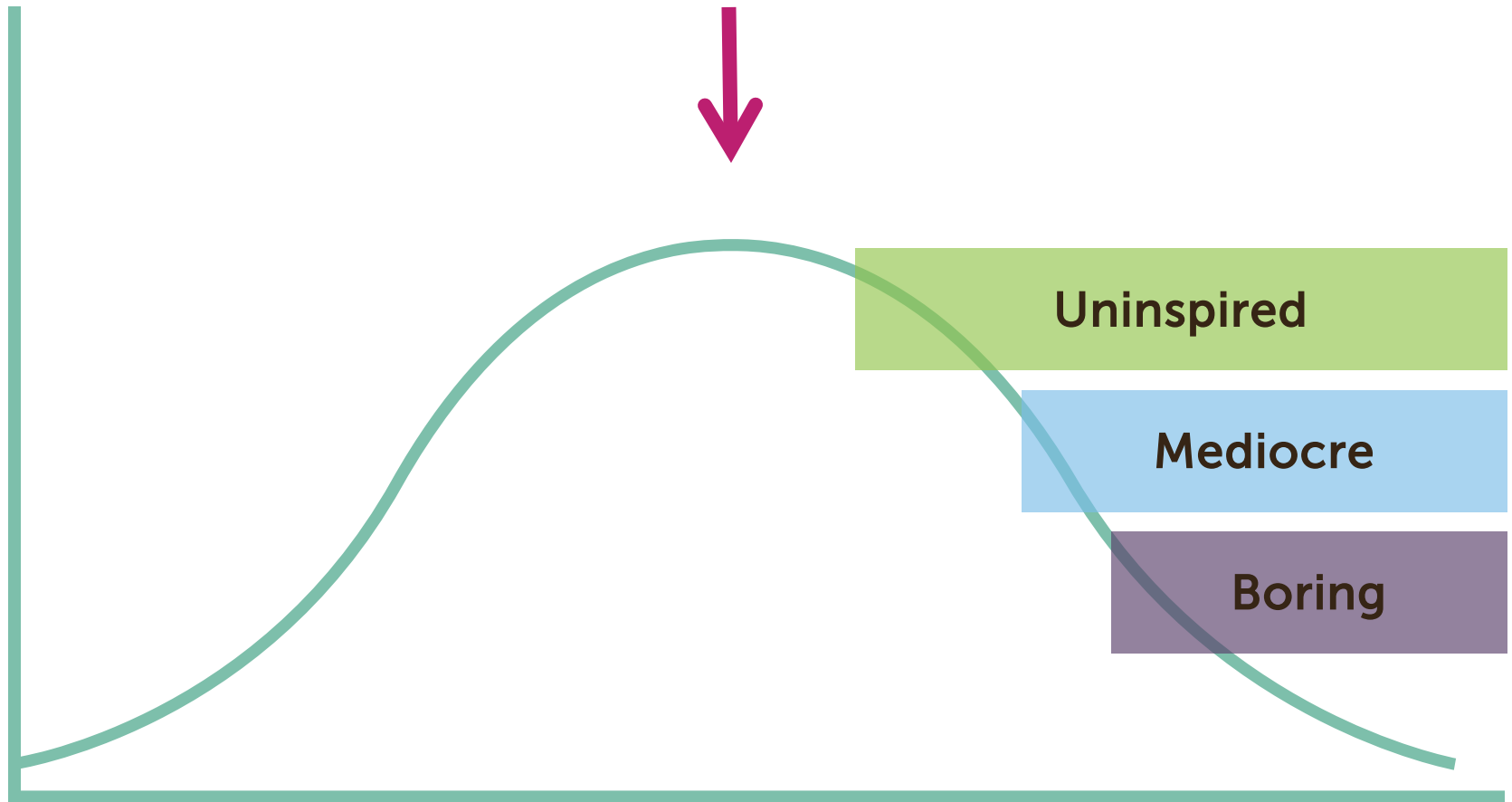
Problem

Means & Standard Deviations



Problem

The Mythical Average



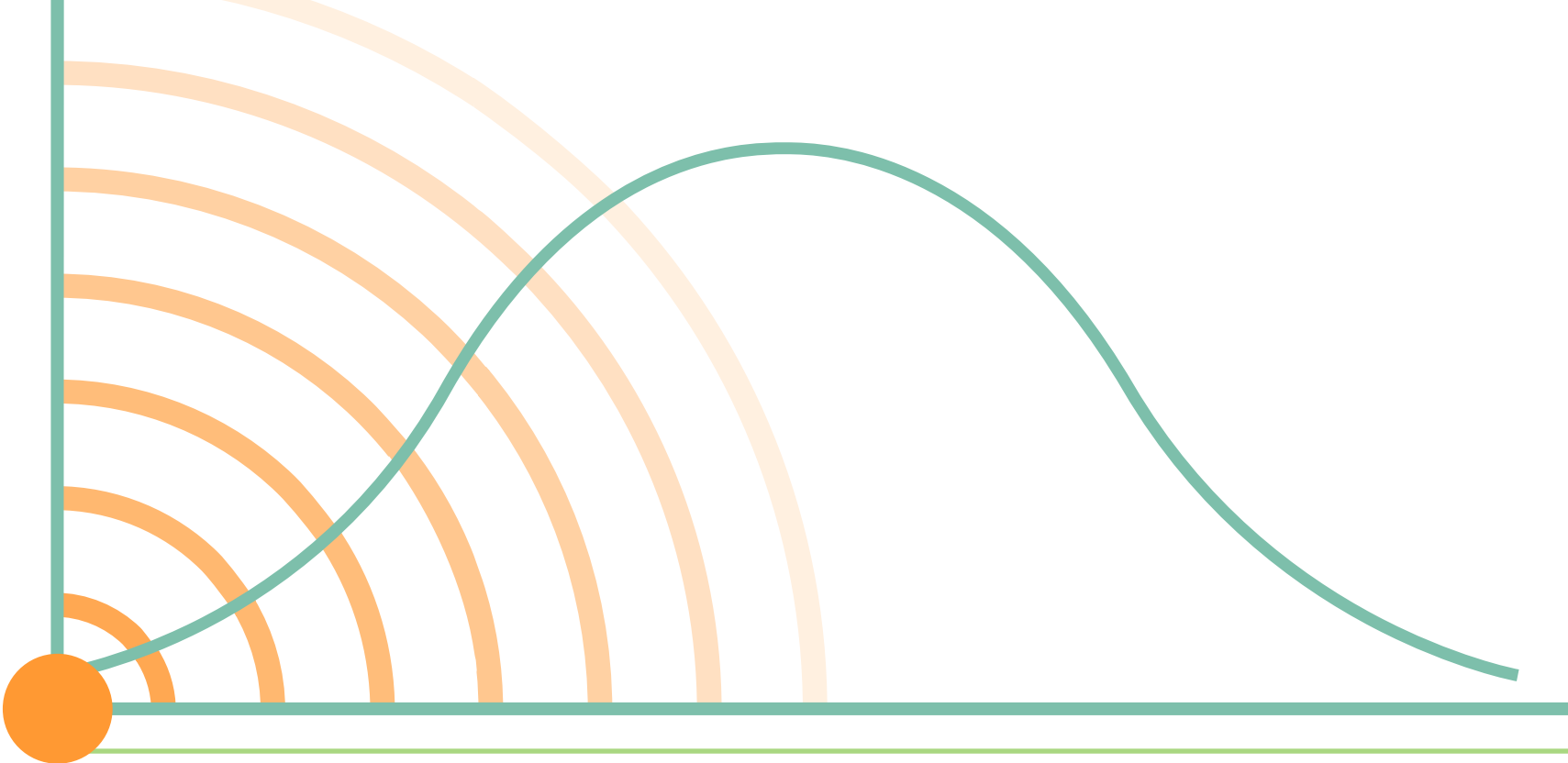
Solution

Study the Outlier ...



Solution

... then Connect to the Larger Opportunity



Solution

Study the Outlier

Food Tribes' values are driving the revolution

Food Tribes' are a source of innovation and inspiration

Empathy with tribe values will facilitate connection to larger mainstream opportunity with shared values



We are in the midst of a **food revolution**

Top Companies Losing Share

-\$18B in market share for
**Top 25 Food & Bev
Companies** since 2009*

Natural & Organic Growing Rapidly

Food & Beverage estimated to
Grow 75%
between 2014 and 2019 to represent
\$107.7B in sales**

Source: *Fortune "The War on Big Food"

**Nutrition Business Journal Estimates, Organic Trade Association Estimates

Large CPGs Under Fire

Urban Gardens

CSAs

Farmers Markets

Maker Movement

Farm to Table

Food Tribes

Cooking Shows

Renegade Chefs

Food Trucks

Millennials

and the list goes on ...

There is **more disruption** now than ever before



“I’ve been doing this for 37 years and this is the most dynamic, disruptive and transformational time that I’ve seen in my career.”

-Steve Hughes, Former CEO & Co-Founder of Boulder Brands
and Ex-ConAgra Executive

However, what the food-forward consumer wants is **not always clear**



“We’ve never seen the consumer as confused as they are today... people were moving to diet sodas. Now they view real sugar as good for you. They’re willing to go to organic, non-GMO products even if [they have] high salt, high sugar, high fat.”

- Indra Nooyi, CEO PepsiCo

To understand the food revolution you have to look closely

It's not just one chaotic food revolution. It's many small, well-defined movements led by food tribes. You must look closely to understand the nuances of each.



Food tribes are **key to understanding** the food revolution & the changing food landscape

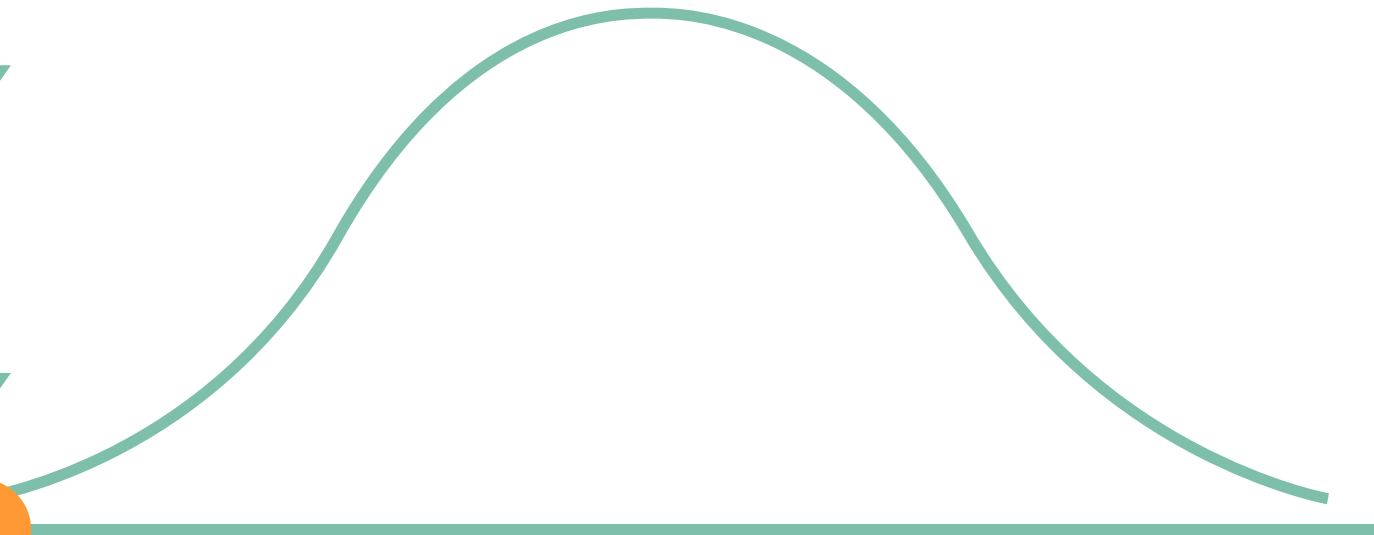
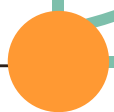
A Food Tribe is a social group **linked by set of common values** and beliefs which shape one's **food and lifestyle choices**.

Tribe values and beliefs are deeply held and often a **defining characteristic** of one's personal identity.

Studying food tribes and their values allows one to better understand and empathize with the consumers who are reshaping the food landscape

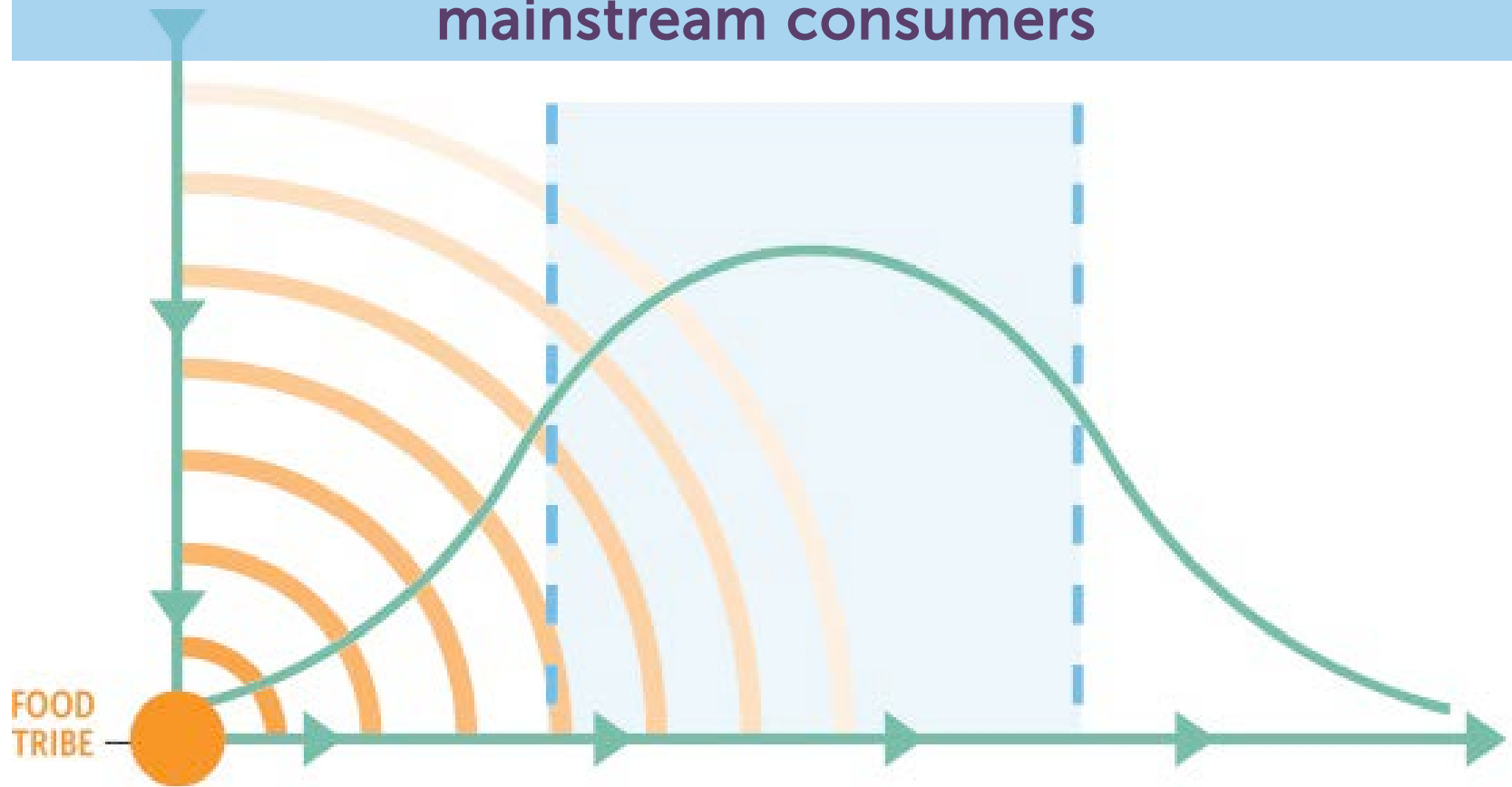
The message is clearest and the values of the food movement are strongest among Food Tribes

FOOD
TRIBE



Food tribes have a **strong influence** on mainstream consumers and **share many values**

Food Tribes broadcast and share their values with mainstream consumers



Consider for example ... The Freegans

DEFINITION

'Freegans are people who employ alternative strategies for living based on limited participation in the conventional economy and minimal consumption of resources.'

RELATING TO MAINSTREAM

Values that resonate broadly

Increasingly even mainstream consumers are finding motivation to challenge habitual decisions these values motivate reevaluation and behavior change.

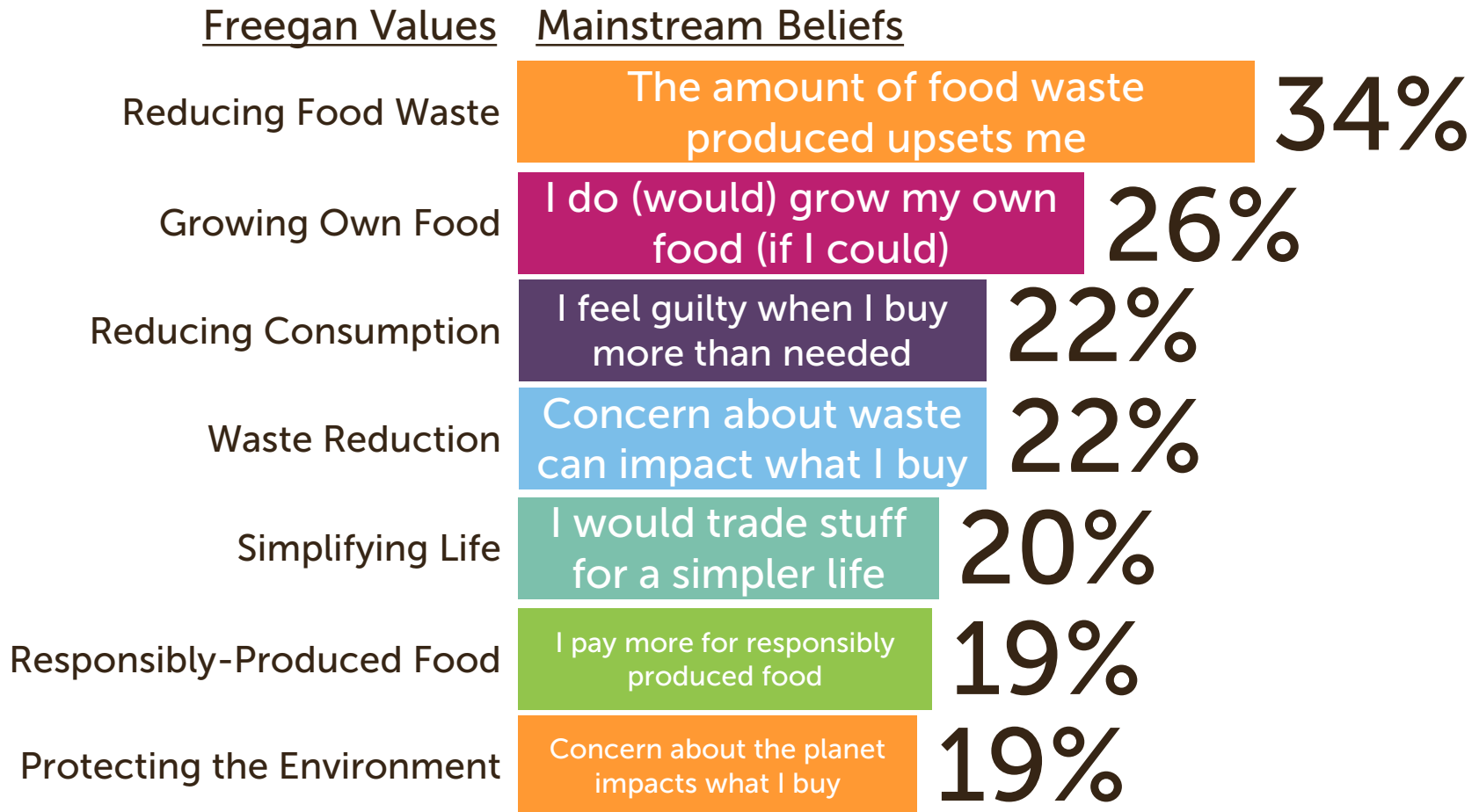
- Reducing unnecessary consumption
- Waste reduction
- Reduced environmental impact
- Understanding where food comes from
- Growing what you can
- Simplifying life



Definition quoted from www.freegan.info

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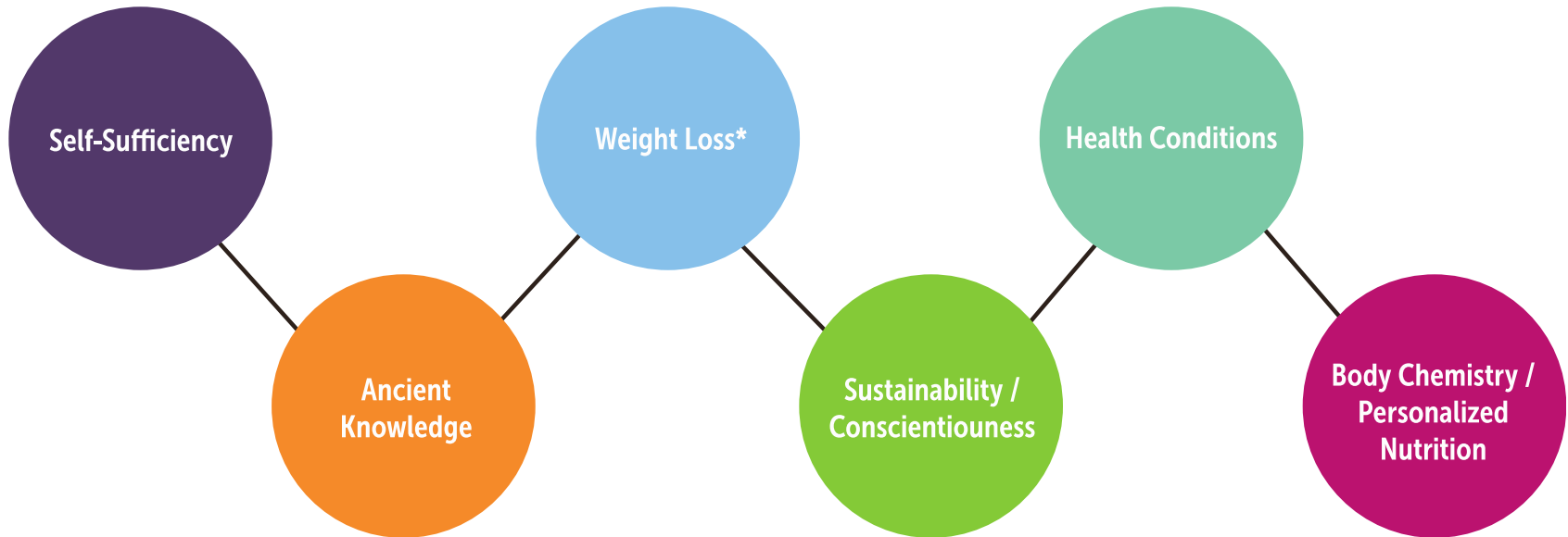
They are small and their behaviors are extreme... but their values are shared by many



Source: NEXT/NBJ Surveys: Gen Pop Samples; Tribe Sizes are rough estimates using self-reported data; N=600 Size, N=400 Values

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Food tribes cluster around these 6 primary motivations

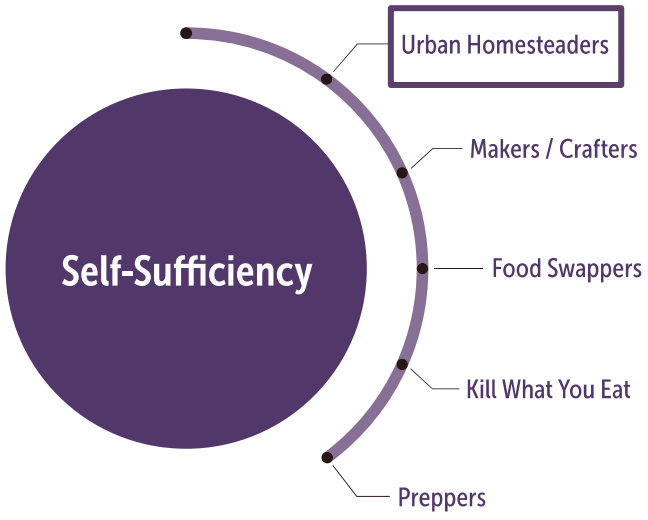


*We will set aside the weigh loss cluster for the focus of this presentation



Motivation: Self Sufficiency

Food Tribe: Urban Homesteaders



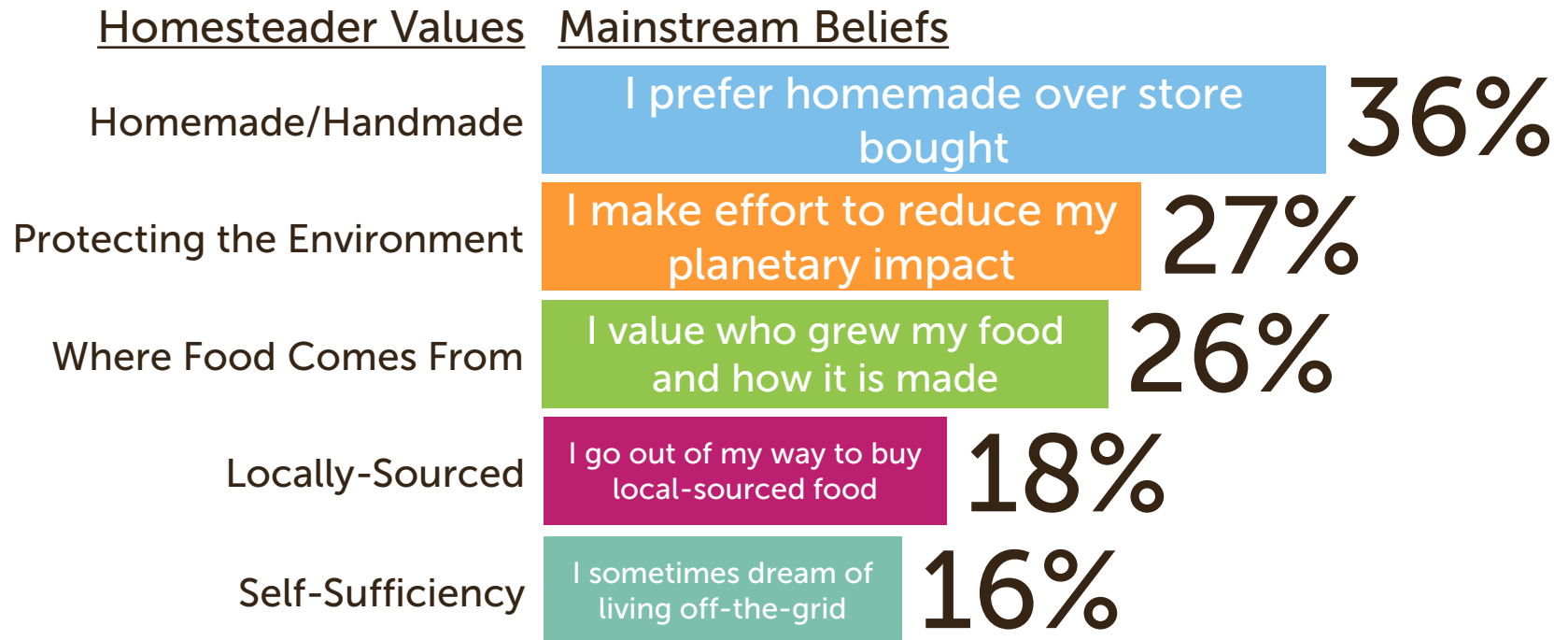
DEFINITION

Lifestyle movement for those living in the city but wanting to live off the land in a more environmentally-conscious & self-sufficient way, especially in regards to food.

- Grow their own food & keep animals for both food and manure
- Take a hands on approach to running and maintaining their households (e.g. home repairs, oil change & auto repairs)
- Compost, practice waste reduction , use alternative fuels & collect rainwater



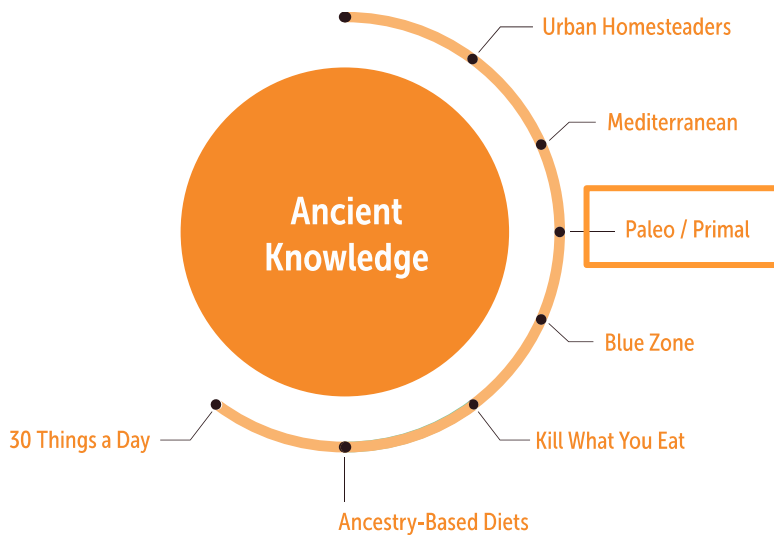
Urban homesteading touches on both our nostalgia for simpler times & our desire to understand and be more connected to our food



Motivation: Ancient Knowledge

Food Tribe: Paleo

Est. Size of Tribe



DEFINITION

Paleo is both a diet & a lifestyle meant to mimic the presumed nutrition & activity levels of our hunter-gatherer ancestors.

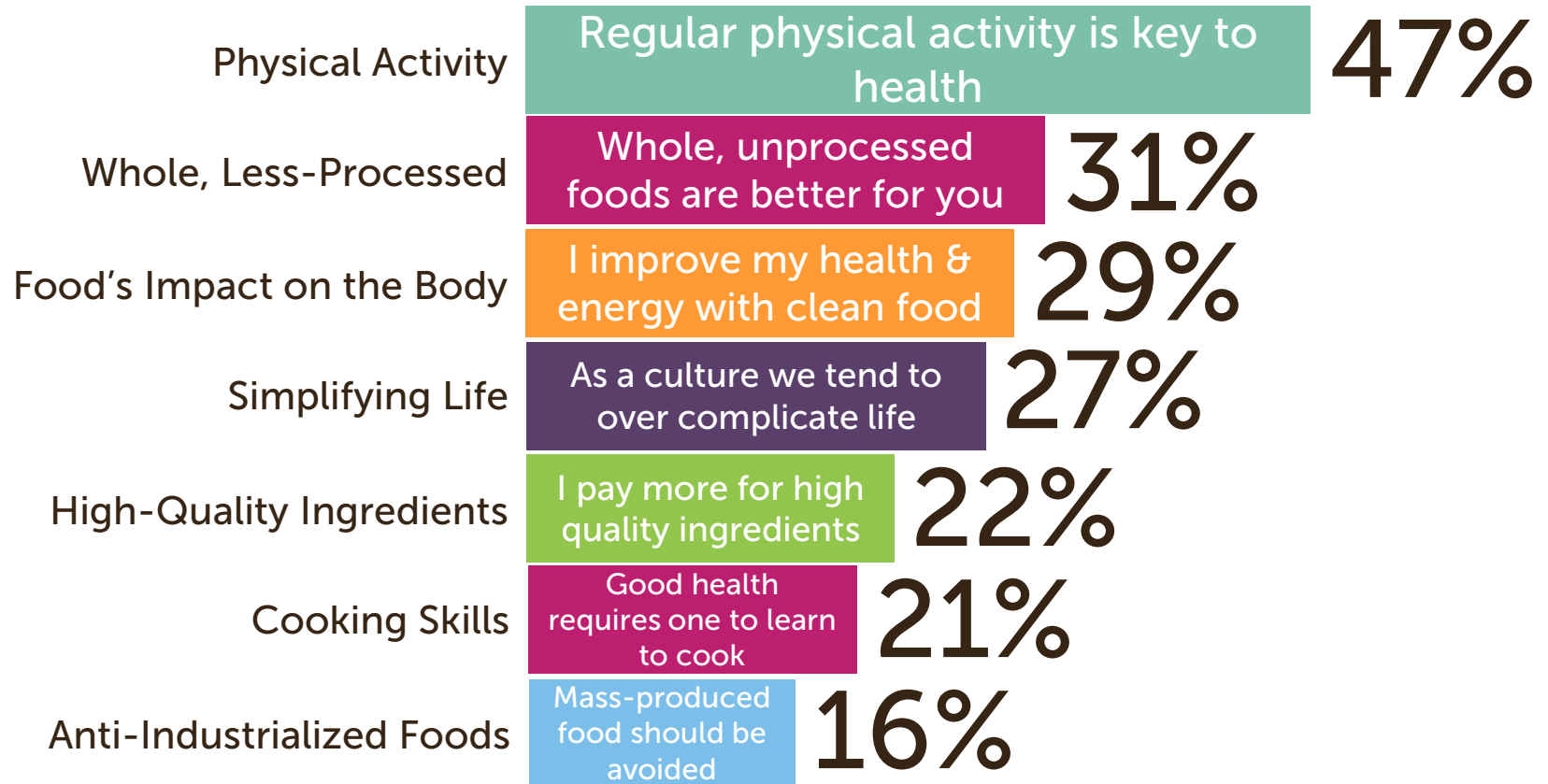
- No processed foods, refined sugars, caffeine, nightshades, dairy, grains and/or legumes
- Endorses naturally and ethically-sourced foods (e.g. organic, non-GMO, grass-fed, pasture-raised)
- Includes many healthy fats, nuts & seeds



For many, unprocessed = healthier is quite believable. There's interest in going back to simpler ingredient lists with higher-quality ingredients

Paleo Values

Mainstream Beliefs

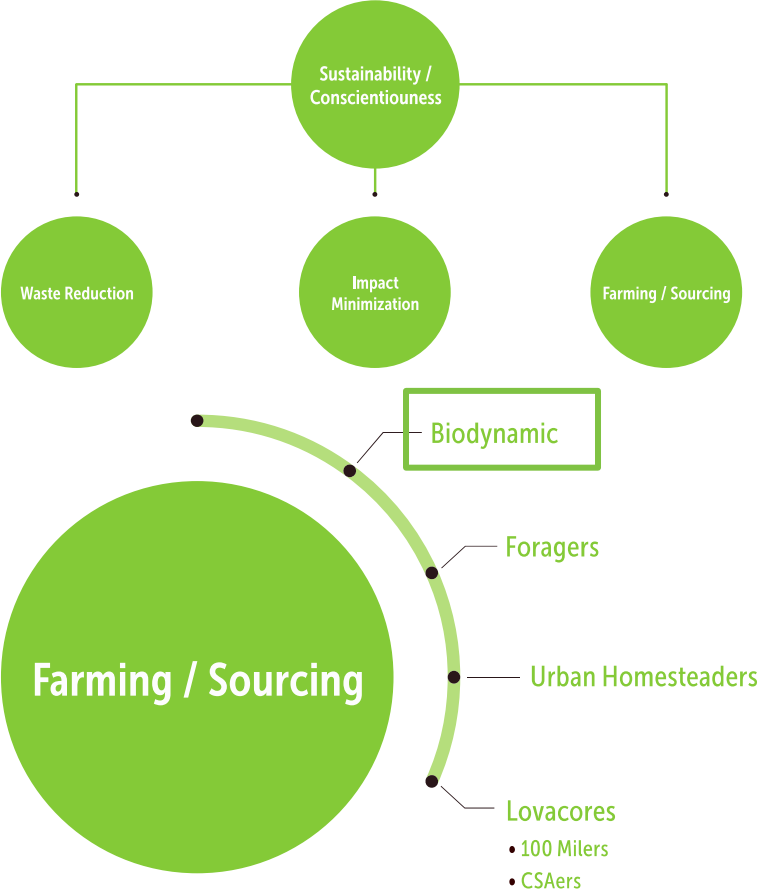


Source: NEXT/NBJ Surveys: Gen Pop Samples; Tribe Sizes are rough estimates using self-reported data; N=600 Size, N=200 Values



Motivation: Sustainability, Farming

Food Tribe: Biodynamic



DEFINITION

Comprehensive & holistic approach to managing a farm's ecosystem in an environmentally-beneficial and unobtrusive way. Principles include:

- Plant diversity – mixing crops so plants support one another
- Crop rotation – moving crops & raising varied animals to encourage healthy soil
- Animal life – raising animals to partake in ecosystem
- Composting – recycling manure & organic waste
- Homeopathic preparations – fermented solutions to treat compost, soil & plants
- Life force – belief that earthly influences and cosmic forces play vital roles in life of a farm



As consumers become more food-educated some will search for 'deep organic' options

Biodynamic Values

Mainstream Beliefs



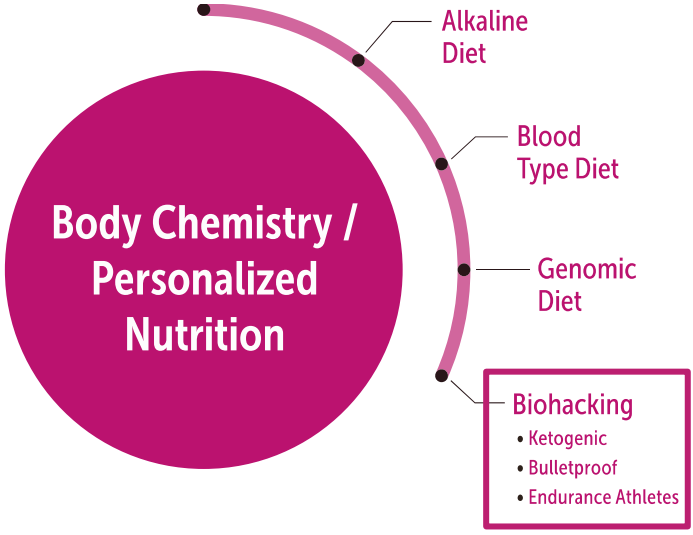
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Motivation: Body Chemistry

Food Tribe: Biohacking

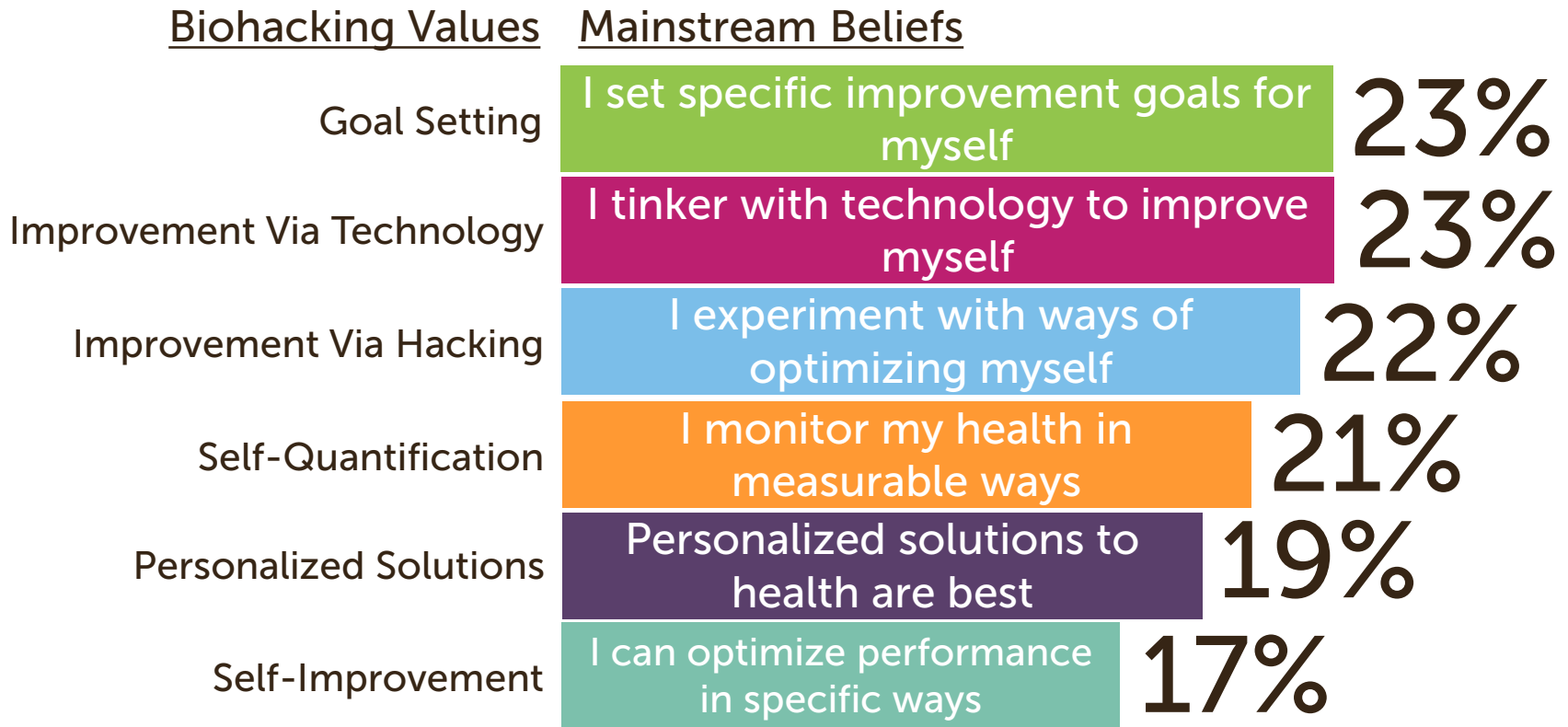


DEFINITION

Cluster of tribes centered around the intersection of science, personalized nutrition & self-improvement and driven to improve their own condition through self-experimentation.

- Motivated to improve themselves in specific and definable ways
- Experiment on themselves as a means of achieving their goals
- Uses a methodical approach and detailed observations/measurements to monitor inputs & outputs and identify solutions

Biohackers value self-improvement through personalized solutions



Source: NEXT/NBJ Surveys: Gen Pop Samples; Tribe Sizes are rough estimates using self-reported data; N=600 Size, N=200 Values

Values vary within the food movement, but many shared values unite it

Protecting the Environment

Anti-Industrialized

Responsibly-Produced Food

Where Food Comes From

Locally-Sourced

Small-Scale Agriculture

Food's Impact on the Body

Food and Self-Awareness

Simplifying Life

Whole, Less-Processed

High Quality Ingredients

Nutrient Rich Food

Food as Medicine

Personalized Solutions

Ethics

Animal Welfare

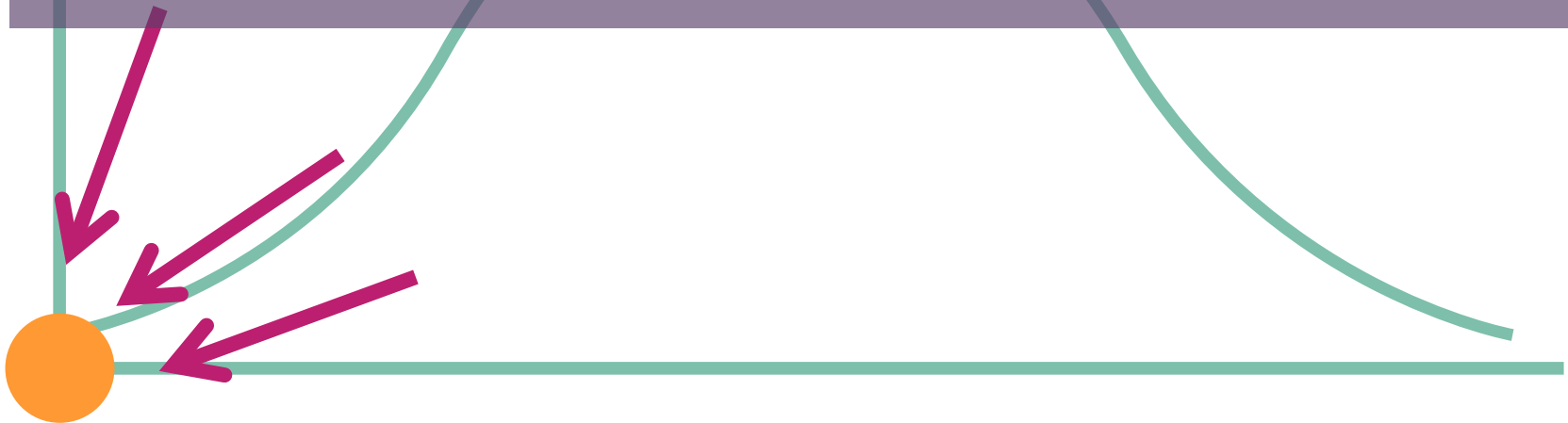
In conclusion ...

Study Food Tribes

Develop empathy for their values and beliefs

Use this connection to inspire your innovation & marketing

Don't worry about the size of the tribe; serve their values to attract a much larger base of consumers with shared values



Thank You!



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