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February 2021

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The Method

WE ARE AN A.I. POWERED INSIGHTS SOLUTION

We are redefining how we can understand people's mindset, sentiment and insights without the limitations, cost and time constraints of traditional methods like online surveys, polls or focus groups. We are privacy compliant and uniquely able to report findings by deep segmentation, globally.

With the power of A.I., we have tech-enabled a way to mine and discover actionable Cultural Intelligence®, straight from the digital voice of the people.

Our algorithm turns all available open-source digital discussions happening anywhere—not just on social media—into actionable insights, without having to ask any questions.



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RTEC: Our Universe of Conversations

**Based on US digital conversations starting in March 1, 2020 and ending in December 15, 2020*



CulturIntel analyzed

1.8M

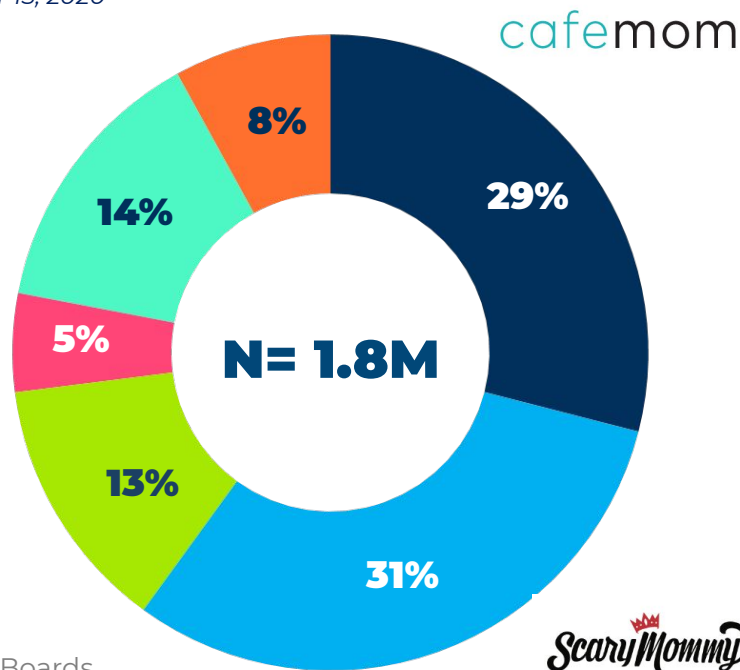
Relevant digital conversations about RTEC.*

General:

- Black Americans - 153.1K
- Hispanics - 97.4K
- Asian Americans - 31.1K
- LGBTQ - 56.7K
- Living w/Disabilities - 9.4K

Boomers:

- All Boomers - 67.4K
- Black Americans - 9.5K
- Hispanics - 4.6K
- Asian Americans - 2.4K
- LGBTQ - 2.5K
- Living w/Disabilities - 968



- Message Boards
- Topical Sites
- Social Networks
- Comments
- Reviews
- Blogs

MESSAGE BOARDS

An internet forum or message board is an online discussion site where people can hold conversations in the form of posted messages

TOPICAL SITES

Topical sites are sites that relate to a specific topic

COMMENTS

Comments are conversations happening on a comment box

*RTEC category was defined by Kellogg's' brands and key competitors brands. Segmentation is based on self-identification.

A note on the methodology

The product category was defined according to Kellogg's brand portfolio and key competitors. See in the appendix for the list of all brands included.

The segmentation is based on how people self-identify in the conversation or on their public profile. For people with disabilities, we captured conversations from people who self-identify as living with disabilities or having someone in the household who does identify as such. For LGBTQ community, we harvested conversations from people who self-identify as pertaining to the LGBTQ community overall or to any of the subcommunities.

The examples of message boards and topical sites are for illustrative purpose and do not represent the most important destination where people discuss the category. Conversations are scattered across multiple sites and there is not one site that is the top site where most of the conversations happen.



HOW TO USE THE INSIGHTS FROM THIS REPORT

1

The insights from CulturlIntel are meant to provide an additional perspective to the insight work already done on the product category. **They are just one piece of all of your insights pie.**

2

The insights reflect what people say **spontaneously, online**, in their peer-to-peer conversations when no one is probing them. As such they may provide a **complementary lens** to traditional qualitative and quantitative research, and are not meant to replace it.

3

The timeframe of the study is the **COVID-era** from March 2019 to December 2020. The insights may reflect some **temporary shifts** due to the pandemic but also some **consolidation of consumption motivations**.

4

The insights from this study are meant to bring some **starting points** when it comes to motivations to consume your product categories, especially across diverse segments. The next step is to work with the I&A team to see how those territories and themes can bring some **inspiration** for communication territories, messaging strategies and product claims.

1

What are the **motivations** to consume RTEC?

Straight from the conversations, we identified 6 motivations to consume RTEC that range from functional benefits associated with the category to emotional benefits.

FUNCTIONAL

EMOTIONAL

CONVENIENCE

The ease, speed and simplicity in which the product is consumed, stored and prepared.

“ Cold cereals are an easy, convenient breakfast.”

VERSATILITY

The ability to adapt to a variety of meal functions, and meal occasions.

“ It's a breakfast, a quick meal and a nighttime snack. ”

TASTE

The overall experience and perception of flavor.

“ Cereal is one of my favorite foods, it's really more of a treat for me. ”

HEALTH

Relating to the quality and composition of ingredients and their capability to nourish.

“ Breakfast cereal makes for a balanced breakfast, especially if it's made with whole grains, is low in sugar and is served with fresh fruit. ”

HH STAPLE

The realization that the product is ever-present and irreplaceable.

“ We are a cereal family and, inevitably, there are three to four types of cereal in our house at all times. ”

NOSTALGIA

The capacity for the product to evoke a feeling of longing for past experiences and memories.

“ I've always had cereal for breakfast since I was a child. ”

1

What are the **motivations** to consume RTEC?

For each motivation, there is a set of **sub-motivations** that further illustrate how the motivation triggers people to consume RTEC.

FUNCTIONAL

EMOTIONAL

Motivations:

CONVENIENCE	VERSATILITY	TASTE	HEALTH	HH STAPLE	NOSTALGIA
The ease, speed and simplicity in which the product is consumed, stored and prepared.	The ability to adapt to a variety of meal functions, and meal occasions.	The overall experience and perception of flavor.	Relating to the quality and composition of ingredients and their capability to nourish.	The realization that the product is ever-present and irreplaceable.	The capacity for the product to evoke a feeling of longing for past experiences and memories.

Submotivations:

Fast Easy Simple to stock	Breakfast Snacking Meal solution	Flavors Flavor Variety Textures	Wholesome ingredients Nutrition Ingredient purity	Familiar taste Multiple uses	Childhood favorite Long kept tradition Fond food memory
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A top-down view of a white bowl filled with milk and cereal flakes. The bowl is centered on a light-colored wooden surface. Numerous cereal flakes are scattered around the bowl, some overlapping it. The flakes are golden-brown and have a textured, flake-like appearance. The background is a warm, yellowish-orange color, possibly a wall or a backdrop, which complements the wooden surface.

1

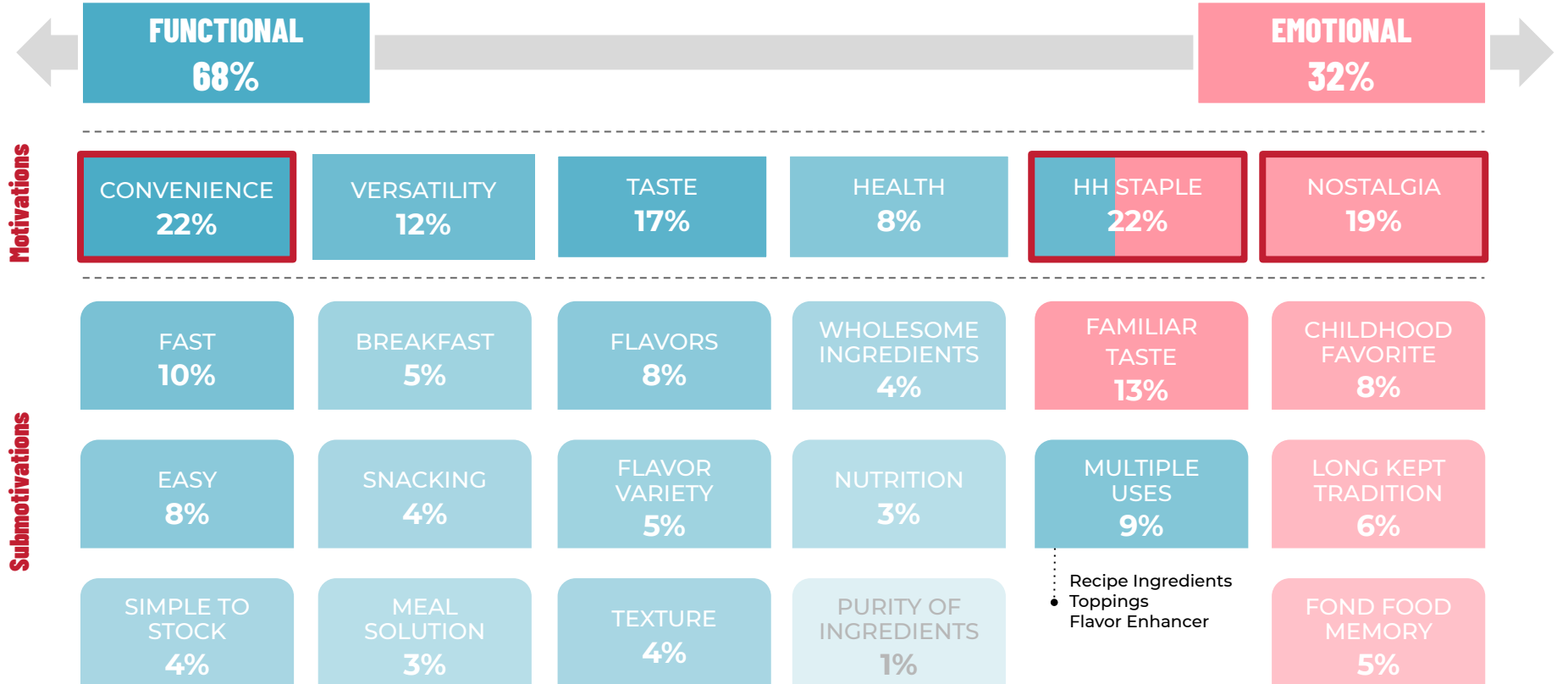
What are the **motivations** to consume RTEC?

The Overall Population is driven by household staples (22%) that are convenient (22%) and inspire nostalgia (19%).

They are mainly motivated to consume RTEC by the **functional benefits** they associate with the category, especially **convenience** and **taste**.

However, 32% of the conversations indicate an **emotional connection** to the category based on **nostalgia** and **a familiar taste they have known all along**.

MOTIVATION DIAGRAM: Overall Population



MOTIVATION SUMMARY SLIDE: Overall Segments

	OVERALL N=1.8M	BLACK AMERICAN N=153.1K	HISPANIC N=97.4K	ASIAN AMERICAN N=31.1K	LGBTQ N=56.7K	W/DISABILITIES N=9.4K
MOTIVATION #1	CONVENIENCE 22% Fast 10% Easy 8% Simple to stock 4%	CONVENIENCE 34% Fast 15% Easy 10% Simple to stock 9%	HH STAPLE 32% Familiar taste 13% Multiple uses 19%	CONVENIENCE 28% Fast 13% Easy 12% Simple to stock 3%	CONVENIENCE 32% Fast 13% Easy 10% Simple to stock 9%	HH STAPLE 27% Multiple uses 15% Familiar taste 12%
MOTIVATION #2	HH STAPLE 22% Familiar taste 13% Multiple uses 9%	TASTE 22% Flavors 10% Flavor variety 8% Texture 4%	CONVENIENCE 26% Fast 12% Easy 11% Simple to stock 3%	TASTE 27% Flavors 12% Flavor variety 7% Texture 8%	HH STAPLE 19% Familiar taste 11% Multiple uses 8%	CONVENIENCE 23% Fast 11% Easy 7% Simple to stock 5%
MOTIVATION #3	NOSTALGIA 19% Fond food memory 9% Childhood favorite 8% Long kept tradition 6%	NOSTALGIA 16% Childhood favorite 6% Long Kept Traditions 7% Fond Food Memory 3%	TASTE 22% Flavors 10% Flavor variety 7% Texture 7%	HH STAPLE 19% Familiar taste 10% Multiple uses 9%	TASTE 19% Flavors 9% Flavor variety 7% Texture 3%	VERSATILITY 15% Breakfast 5% Snacking 5% Meal Solution 5%

MOTIVATION SUMMARY SLIDE: Segments

BLACK AMERICANS

Black Americans are driven by **convenient cereals that are tasty and inspire nostalgia**.

They are more motivated by convenience (1.5x) and taste (1.3x). These two motivations make up half of their drivers to consume.

Black Americans see cereals as a convenient and tasty breakfast option in cereals that have been part of their morning ritual and as such have an emotional connection with the category.

HISPANICS

Hispanics are driven by the fact that cereals are a **household staple that is convenient and tasty**.

Convenience is relevant for them, but they are more motivated by HH Staple (1.5x) and taste (1.4x) than the overall population, and less by health (4x), nostalgia (2.1x) and versatility (1.7x).

For Hispanics, cereals are an essential part of their pantry as a convenient and tasty option. They do not have an emotional attachment to the category as much as other segments.

ASIAN AMERICANS

Asian Americans are driven by **convenient cereals that are tasty and a household staple**.

They are the most motivated by functional benefits of all segments. Convenience (1.3x) and taste (1.6x) are the most relevant motivations, while nostalgia is 3.2x less important.

For Asian Americans, cereals are a convenient and tasty option in their pantry. They do not have an emotional attachment to the category as much as other segments.

LGBTQ

LGBTQ people are driven by **convenient cereals that are tasty and have become a household staple**.

Convenience is 1.5x more relevant for this segment, especially because of this products are simple to stock (2.3x). They focus 1.3x less on emotional motivations, but they do value the familiar taste.

For LGBTQ, cereals are a convenient and tasty option in their pantry. They do not have an emotional attachment to the category as much as other segments.

P. W/DISABILITIES

People Living with Disabilities are driven by the fact that cereals are a **household staple that is convenient and tasty**.

They focus more on functional benefits, especially convenience and taste. However, they value the multiple uses of the product (1.6x), and its versatility (1.3x), especially as a meal solution (1.7x).

For People With Disabilities, RTEC seem to be consumed for their convenience and taste beyond the traditional breakfast occasion.

A top-down view of a bright green bowl filled with white milk and numerous golden-brown ring-shaped cereal pieces. A few cereal pieces are scattered on the white surface around the bowl.

2

Do **Black Americans** have different motivations that make them unique, and do they share similarities with the overall population?

Convenience:

"This is my go-to quick breakfast. Healthy & delicious and easy"

Taste:

"Adults love it and kids love it!"

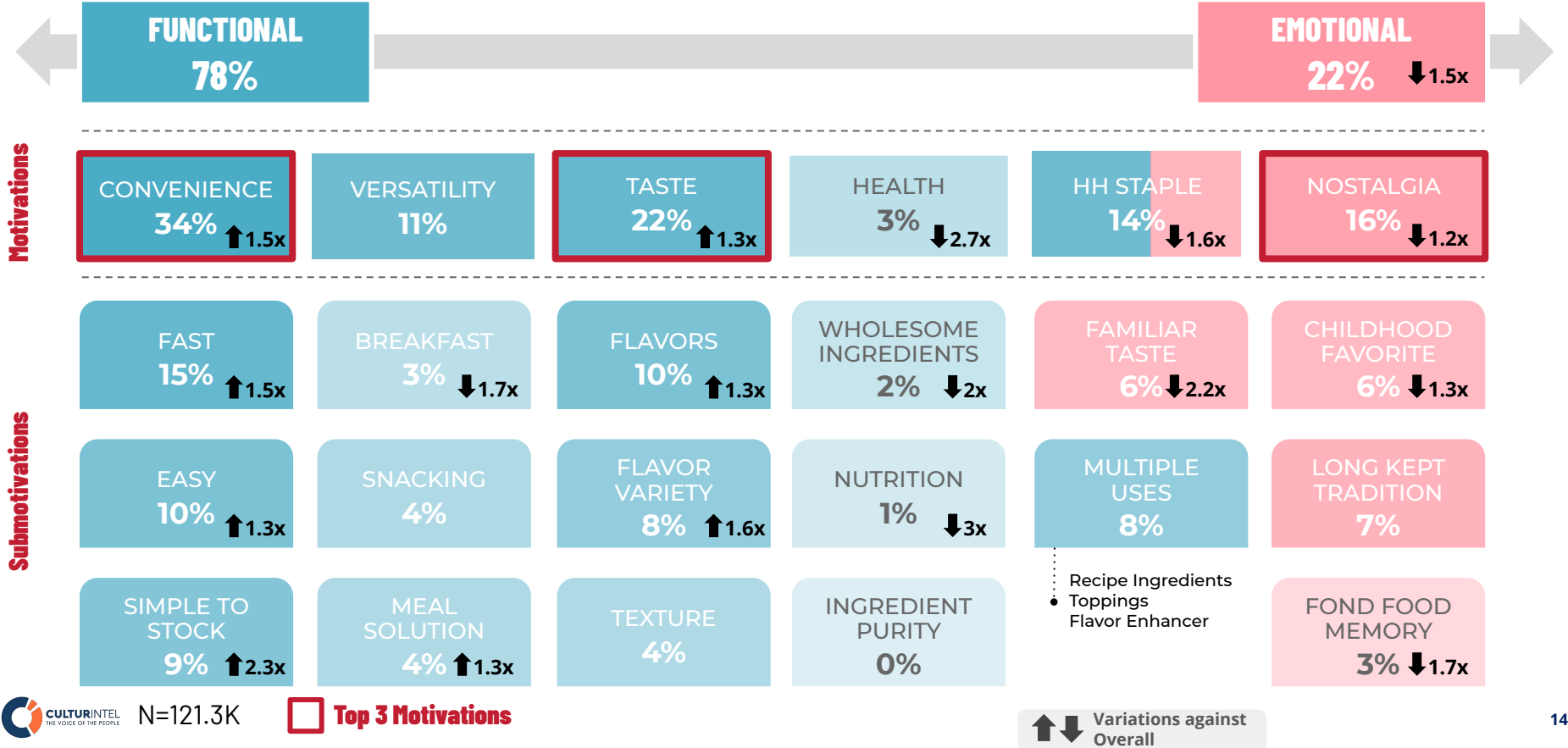
Nostalgia:

"Great product to eat in the morning. Love it all. You should too. It's a classic."

Black Americans are driven by convenient (34%) cereals that are tasty (22%) and inspire nostalgia (16%).

They do have different motivations than the overall population. In general, **they focus more on functional motivations** rather than emotional ones. They also are more motivated by **convenience** (1.5x) and **taste** (1.3x). These two motivations make up half of their drivers to consume. In contrast, they are less driven by health (2.7x) and HH Staple (1.6x).

MOTIVATION DIAGRAM: Black Americans



2

Do **Hispanics** have different motivations that make them unique, and do they share similarities with the overall population?

Convenience:

"Always are the quickest breakfast item to go!"

Taste:

"Kids and husband love this stuff!"

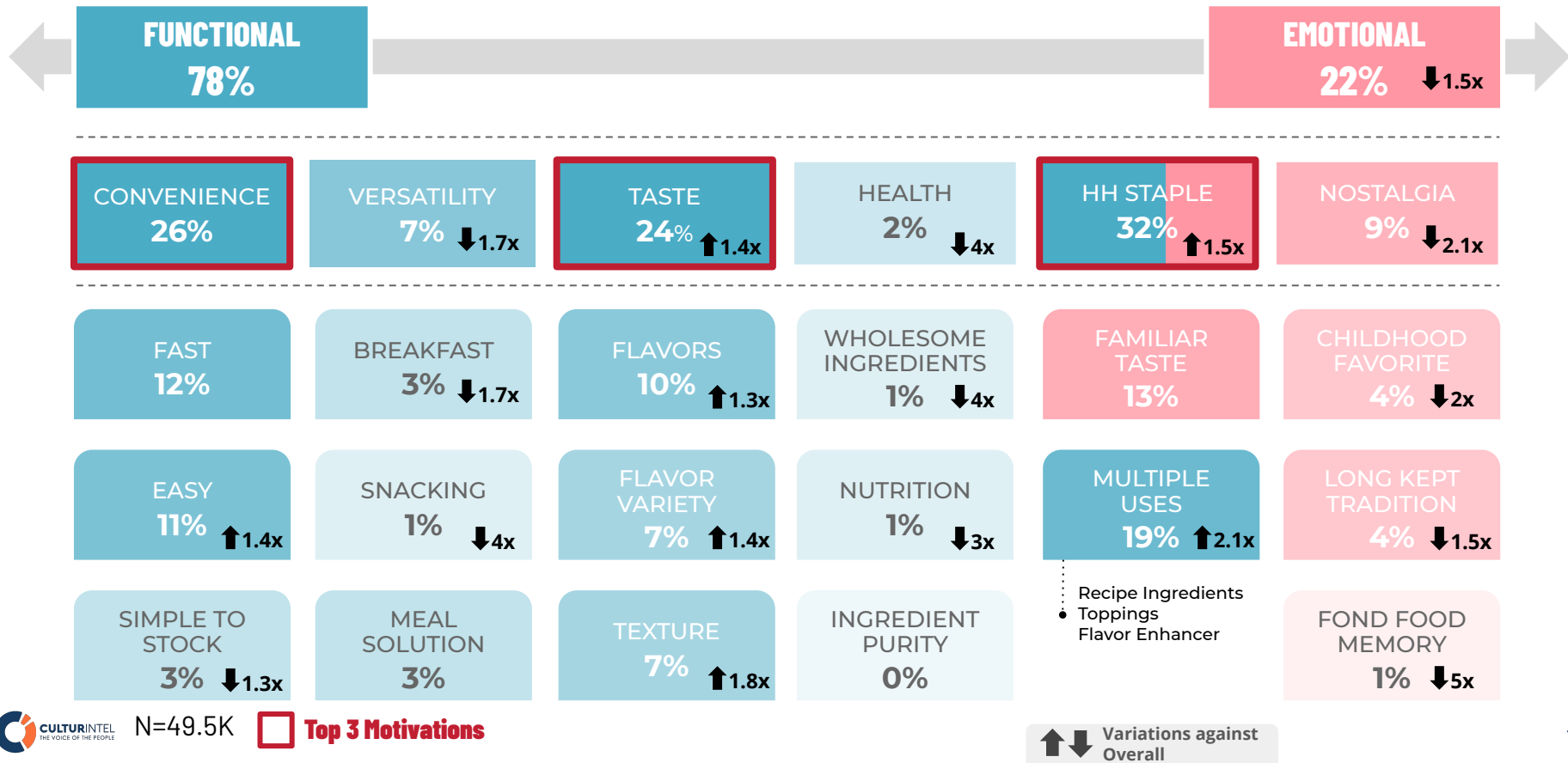
HH staple:

"this one is one of them that I need to have at home."

Hispanics are driven by household staples (32%) that are convenient (26%) and tasty (24%).

Just as Black Americans, they also **focus more on functional motivations** rather than emotional ones. Convenience is relevant for them, but they are more motivated by **HH Staple** (1.5x) and **taste** (1.4x) than the overall population, and less by health (4x), nostalgia (2.1x) and versatility (1.7x).

MOTIVATION DIAGRAM: Hispanics





2

Do **Asian Americans** have different motivations that make them unique, and do they share similarities with the overall population?

Convenience:

"An easy snack for your long days ! I wouldn't change a thing"

Taste:

"Not only is it healthy but it is also delicious!"

HH staple:

"I love Honey Nut Cheerios. They are a staple in my life"

Asian Americans are driven by convenient (28%) cereals that are tasty (27%) and a household staple (19%).

They are the segment that **focuses more on functional motivations** rather than emotional ones. **Convenience** (1.3x) and **taste** (1.6x) are the most relevant motivations, while nostalgia is 3.2x less important.

Motivations





2

Does those in the **LGBTQ community** have different motivations that make them unique, and do they share similarities with the overall population?

Convenience:

"an easy way to start your day."

Taste:

"It tastes great as a breakfast or even a snack."

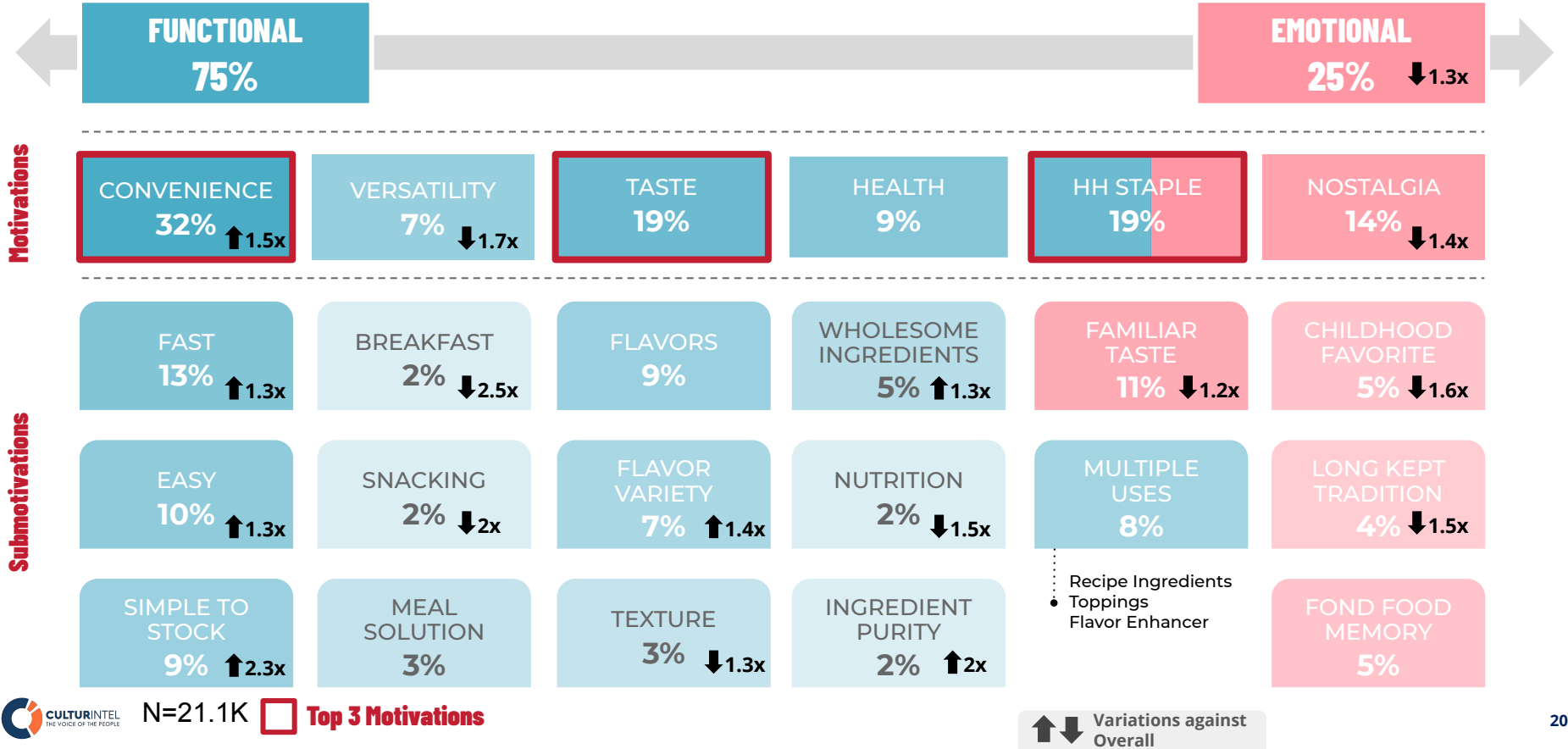
HH staple:

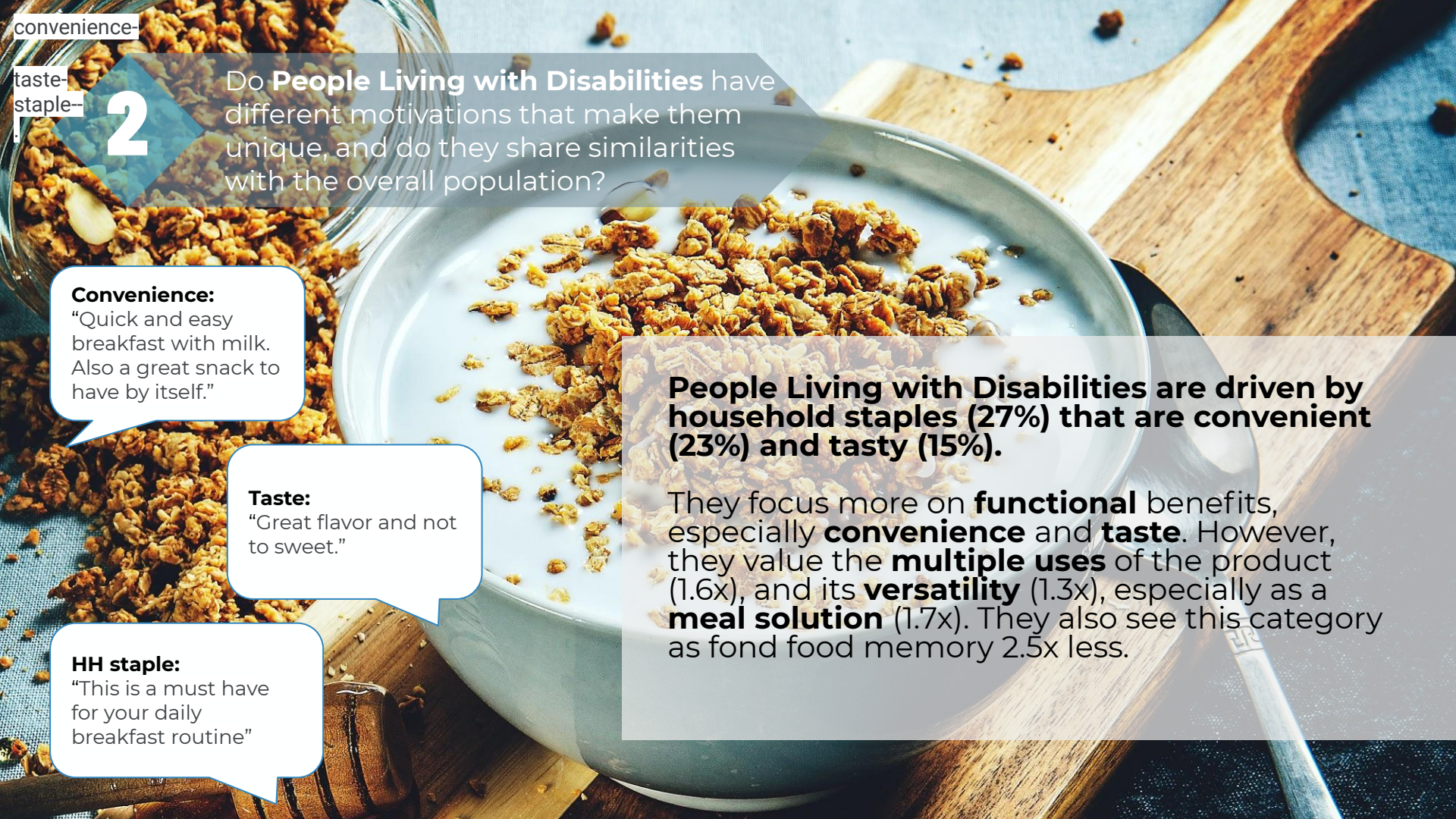
"a breakfast go-to always make sure we have this on hand"

LGBTQ people are driven by convenient (32%) cereals that have become a household staple (19%) and are tasty (19%).

They focus more on **functional** motivations to consume RTEC. **Convenience** is 1.5x more relevant for this segment, especially because of this products are **simple to stock** (2.3x). Conversely, they focus 1.3x less on emotional motivations, but they do value **familiar taste**.

MOTIVATION DIAGRAM: LGBTQ





convenience-

taste-
staple-

2

Do **People Living with Disabilities** have different motivations that make them unique, and do they share similarities with the overall population?

Convenience:

"Quick and easy breakfast with milk. Also a great snack to have by itself."

Taste:

"Great flavor and not too sweet."

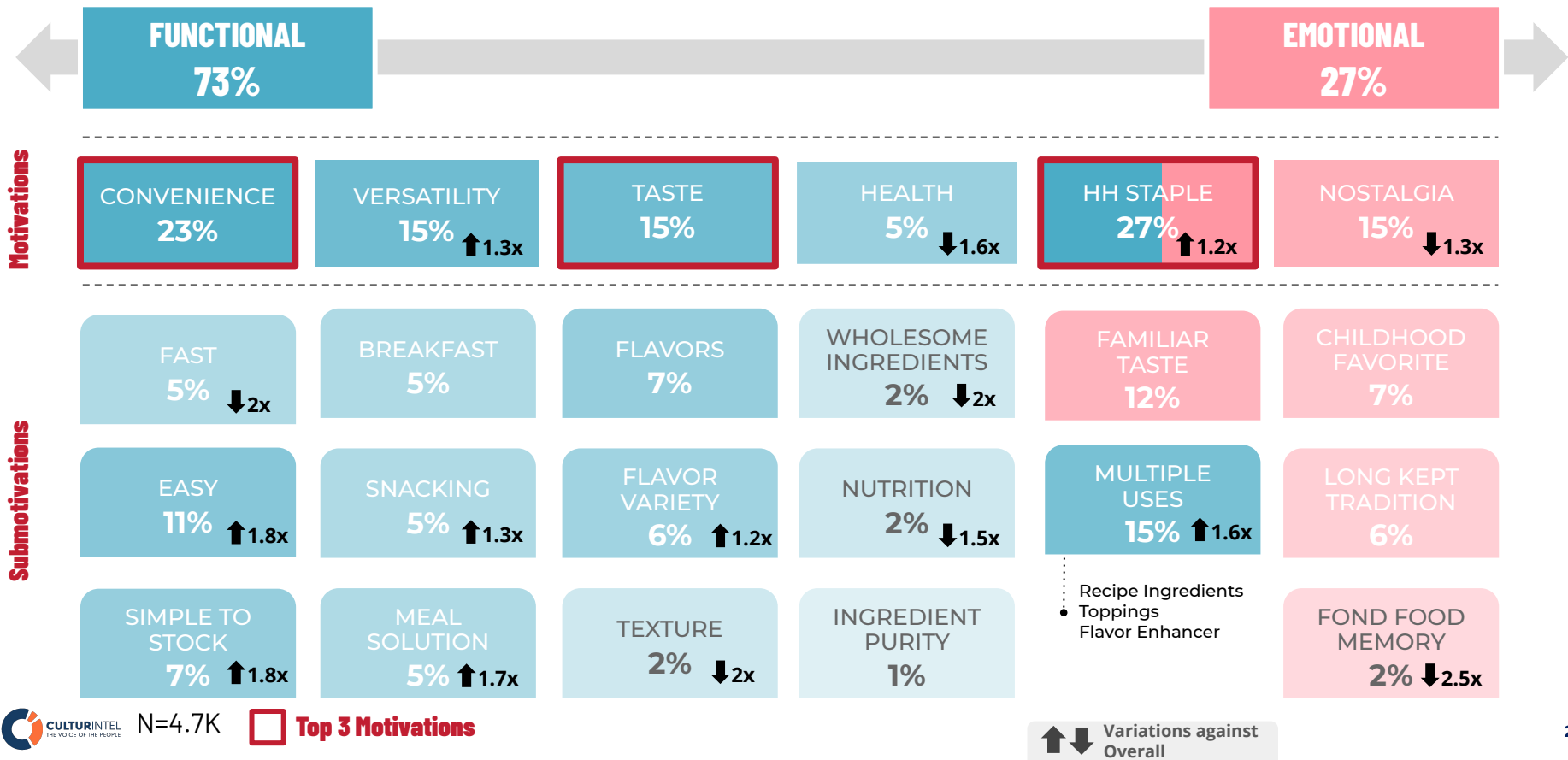
HH staple:

"This is a must have for your daily breakfast routine"

People Living with Disabilities are driven by household staples (27%) that are convenient (23%) and tasty (15%).

They focus more on **functional** benefits, especially **convenience** and **taste**. However, they value the **multiple uses** of the product (1.6x), and its **versatility** (1.3x), especially as a **meal solution** (1.7x). They also see this category as fond food memory 2.5x less.

MOTIVATION DIAGRAM: People Living With Disabilities



A top-down view of a white ceramic bowl filled with milk and various types of cereal, including cornflakes and bran flakes. A silver spoon is placed to the right of the bowl. The background is a light-colored surface with small dark specks.

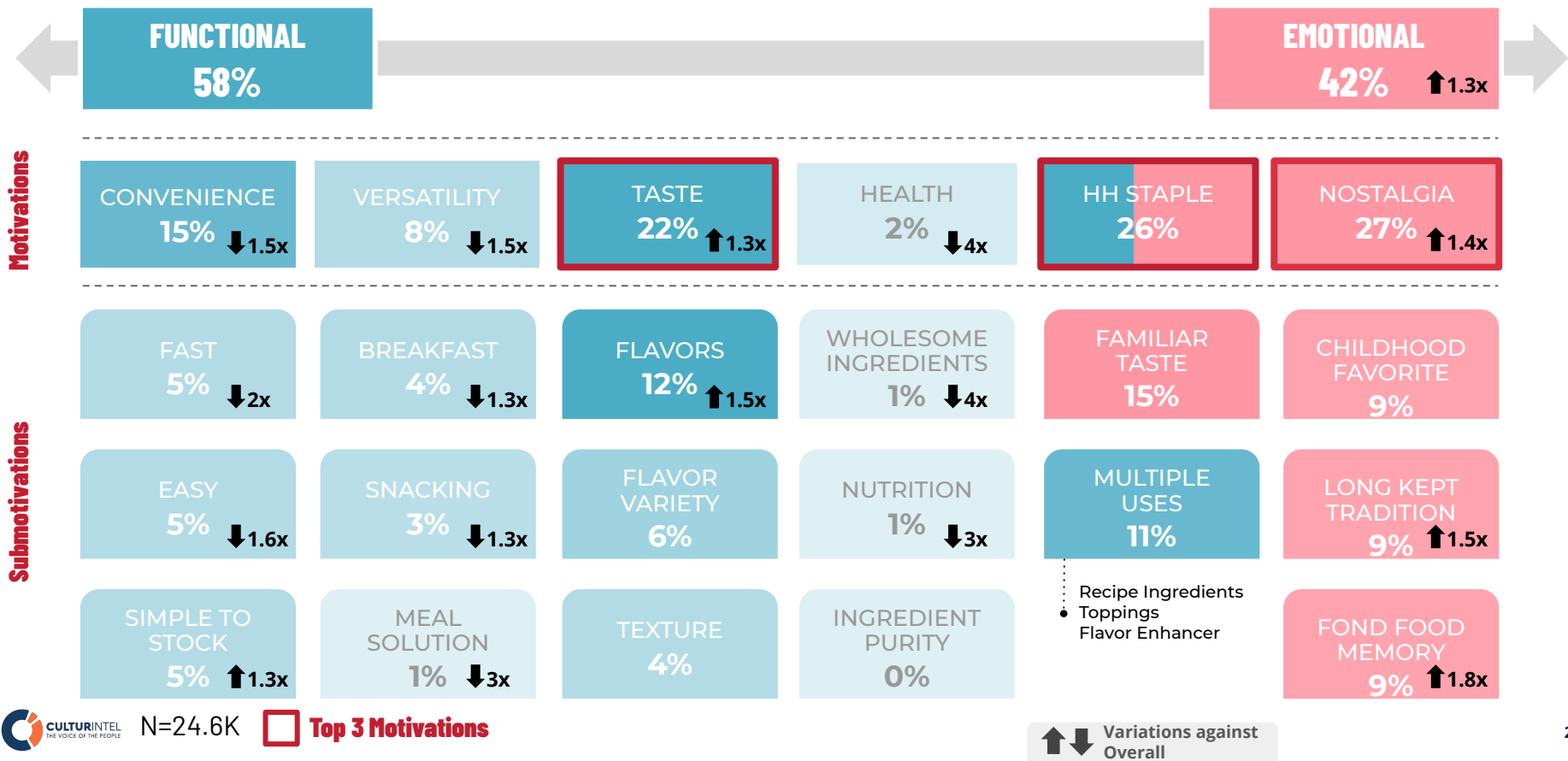
3

How does **aging** impact consumer behavior for **overall population**?

RTEC becomes a sensory cue through taste and flavors that gets people to reminisce about their childhood, memories and a long kept tradition, just like a Proust madeleine.

Overall Boomers are driven by **nostalgic** (27%) products that have become a **household staple** (26%) and are **tasty** (22%). Their consumption is **more driven by emotional motivations** (1.3x) due to a longer relationship with the category. Their motivations are more focused on **nostalgia** (1.4x) and **flavors** (1.5x), and less on health (4x), convenience (1.5x) and versatility (1.5x) vs. overall population.

MOTIVATION DIAGRAM: Overall Boomers



MOTIVATION SUMMARY SLIDE: Boomers Segments

	OVERALL N=67.4K	BLACK AMERICAN N=9.5K	HISPANIC N=4.6K	ASIAN AMERICAN N=2.4K	LGBTQ N=2.5K	W/DISABILITIES N=968
MOTIVATION #1	NOSTALGIA 27% Childhood favorite 9% Long Kept Traditions 9% Fond Food Memory 9%	NOSTALGIA 26% Childhood favorite 10% Long Kept Traditions 10% Fond Food Memory 6%	HH STAPLE 31% Multiple uses 20% Familiar taste 11%	HH STAPLE 25% Multiple uses 13% Familiar taste 12%	NOSTALGIA 31% Fond Food Memory 13% Childhood favorite 9% Long Kept Traditions 8%	HH STAPLE 27% Multiple uses 19% Familiar taste 8%
MOTIVATION #2	HH STAPLE 26% Familiar taste 15% Multiple uses 11%	HH STAPLE 22% Multiple uses 13% Familiar taste 9%	TASTE 28% Flavors 11% Flavor variety 10% Texture 7%	TASTE 24% Flavors 12% Flavor variety 6% Texture 6%	CONVENIENCE 21% Easy 8% Fast 7% Simple to stock 7%	CONVENIENCE 25% Easy 13% Simple to stock 11% Fast 2%
MOTIVATION #3	TASTE 22% Flavors 12% Flavor variety 6% Texture 4%	TASTE 19% Flavors 10% Flavor variety 6% Texture 3%	NOSTALGIA 17% Childhood favorite 7% Long Kept Traditions 7% Fond Food Memory 3%	CONVENIENCE 18% Fast 7% Simple to stock 6% Easy 5%	TASTE 20% Flavors 9% Flavor variety 5% Texture 5%	TASTE 21% Flavors 12% Flavor variety 7% Texture 2%

MOTIVATION SUMMARY SLIDE: Boomers Segments

BLACK AMERICAN BOOMERS

Black American Boomers are driven by **nostalgic products that have become a household staple and are tasty.**

Their consumption is more driven by emotional motivations (1.6x). In contrast, they are 2.4x less driven by convenience than overall Black Americans.

With time, there seems to be an even greater emotional attachment to the category.

HISPANIC BOOMERS

Hispanic Boomers are driven by the fact that RTEC are **a household staple that is tasty and inspire nostalgia.**

Their consumption is more driven by emotional motivations (1.6x), but functional motivations keep on being very relevant. They also are more motivated by versatility (2x) and less by convenience (2.8x) and health (2x) than overall Hispanics.

With time, there seems to be a growing emotional attachment to a category they indulge in.

ASIAN AMERICAN BOOMERS

Asian American Boomers are driven by the fact that RTEC are a **household staple that is tasty and convenient.**

They are emotionally motivated by the category 1.6x more than other Asian Americans, especially because of the nostalgia (2.2x) associated to the brands and products they know. In contrast, they are less motivated by convenience (1.6x) and health (1.4x).

With time, there seems to be a growing emotional attachment to a category they indulge in.

LGBTQ BOOMERS

LGBTQ are driven by **cereals that evoke nostalgia and are convenient and tasty.**

They are 1.4x more motivated by emotional aspects of the category, specifically nostalgia (2.2x more than other LGBTQ people), and less motivated by convenience (1.5x) and health (1.3x). However, they value versatility, especially when snacking (2.5x).

With time, there seems to be a growing emotional attachment to a category they indulge in beyond the traditional breakfast occasion.

P. W/DISABILITIES BOOMERS

Boomers living with disabilities are driven by cereals that are a **household staple, that are convenient and tasty.**

They are still more focused on the functional motivations of the category, especially flavors (1.7x), stocking simplicity (1.6x) and its uses during breakfast (1.4x).

Contrary to other segments, Boomers with disabilities are less driven by emotional drivers and more focused on the fact that RTEC are a practical and tasty choice, especially for breakfast.

A top-down view of a breakfast meal. On the left is a glass of bright orange juice. To its right is a light-colored bowl filled with granola, which includes oats, nuts, and dried fruit. A silver spoon is partially submerged in the granola. A semi-transparent grey box with a white number '3' is overlaid on the top left, and a larger semi-transparent grey box with white text is overlaid on the bottom right.

3

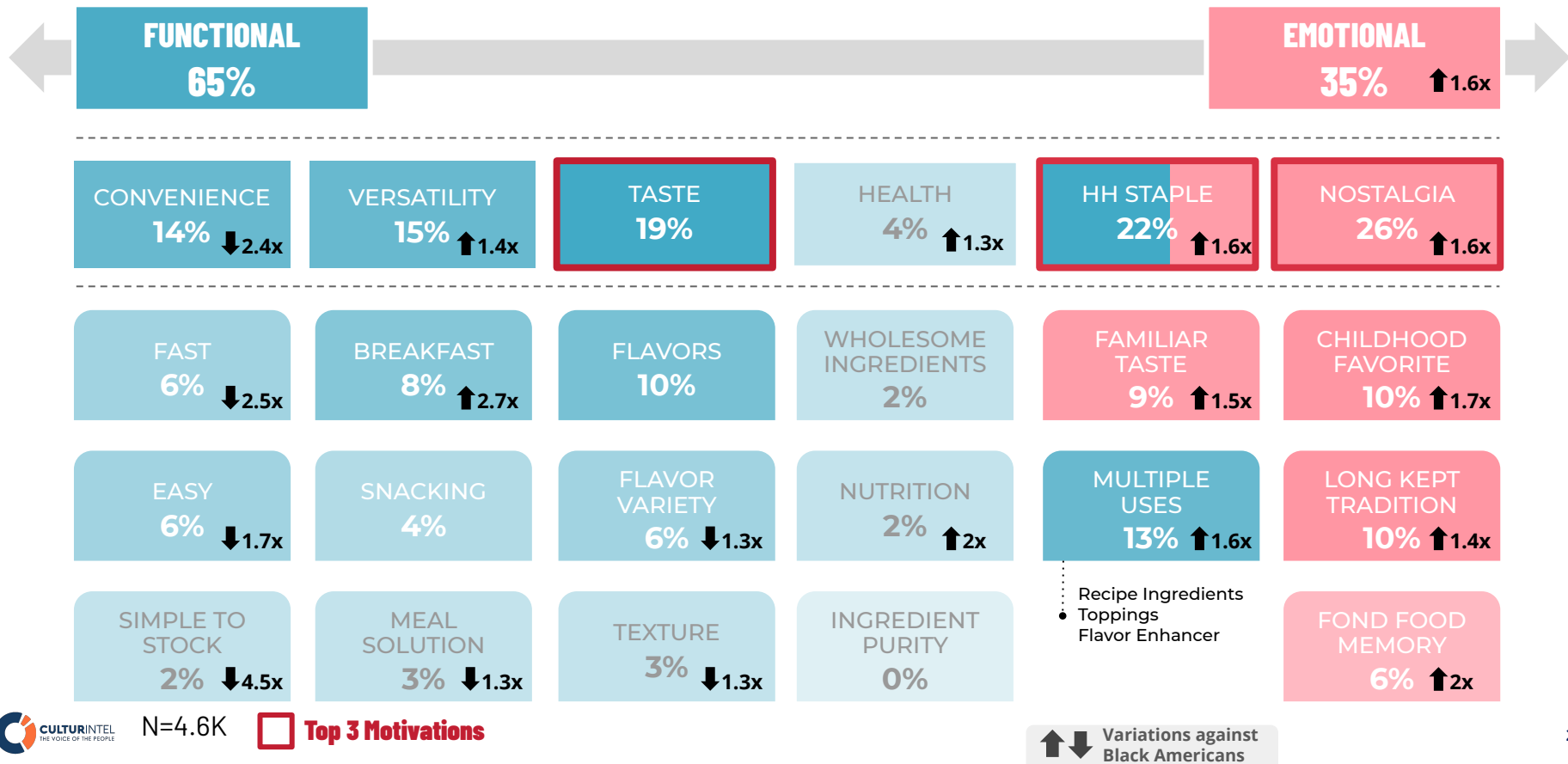
How does **aging** impact consumer behavior for **Black Americans**?

Black American Boomers are driven by nostalgic (26%) products that have become a household staple (22%) and are tasty (19%).

Their consumption is **more driven by emotional motivations** (1.6x).

With time, there seems to be an emotional attachment to the category. Their motivations are tied to **nostalgia** (1.6x), **HH Staple** (1.6x), and **versatility** (1.3x). In contrast, they are less driven by convenience (2.4x) than overall Black Americans.

MOTIVATION DIAGRAM: Black American Boomers



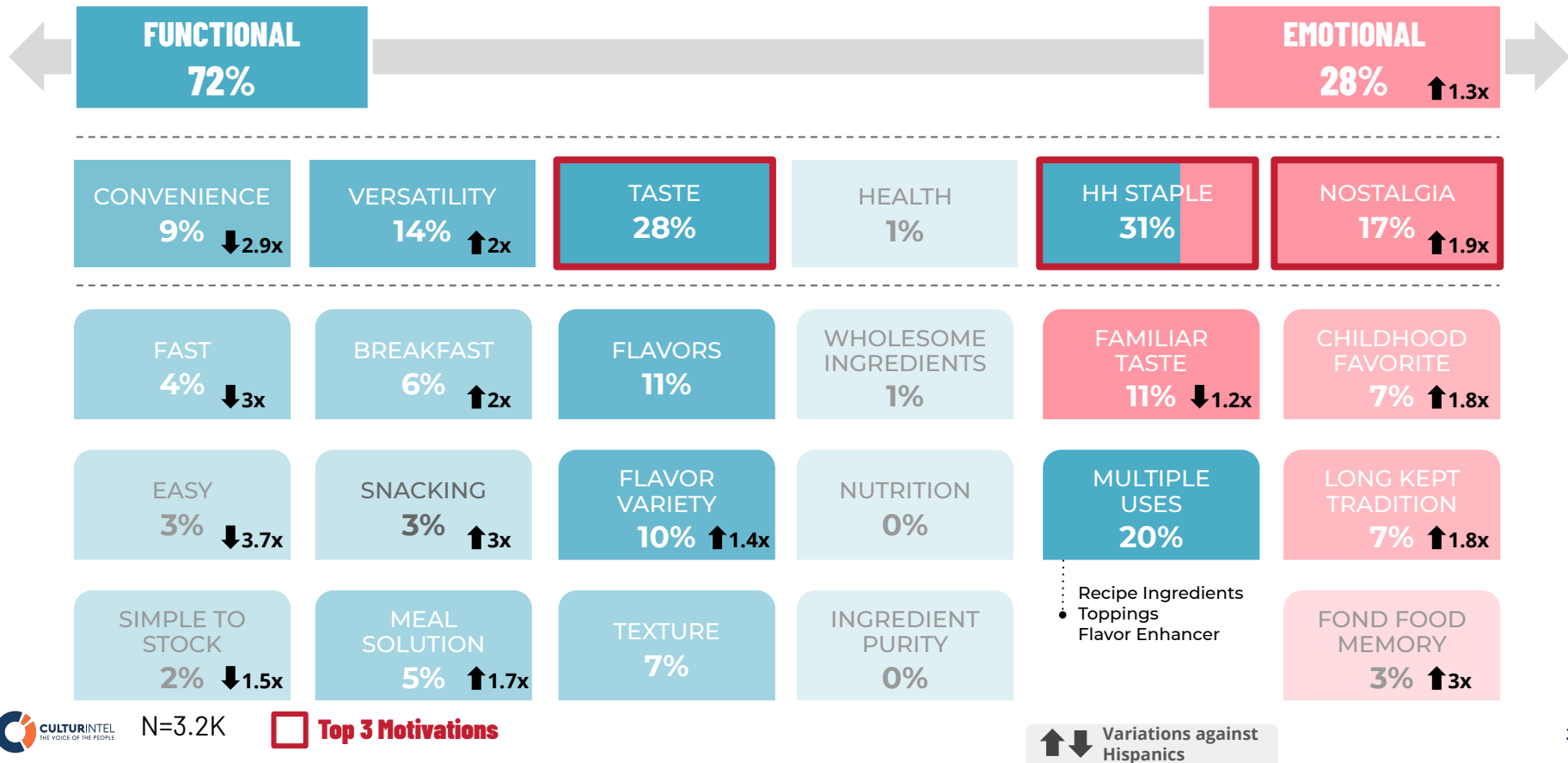
3

How does **aging** impact consumer behavior for **Hispanics**?

Hispanic Boomers are driven by household staples (31%) that are tasty (28%) and inspire nostalgia (17%).

Their RTEC products consumption is more **driven by emotional motivations** (1.6x), but **functional** motivations keep on being very relevant. They also are more motivated by **versatility** (2x) and **nostalgia** (1.8x) and less by convenience (2.8x) and health (2x) than overall Hispanics.

MOTIVATION DIAGRAM: Hispanics Boomers



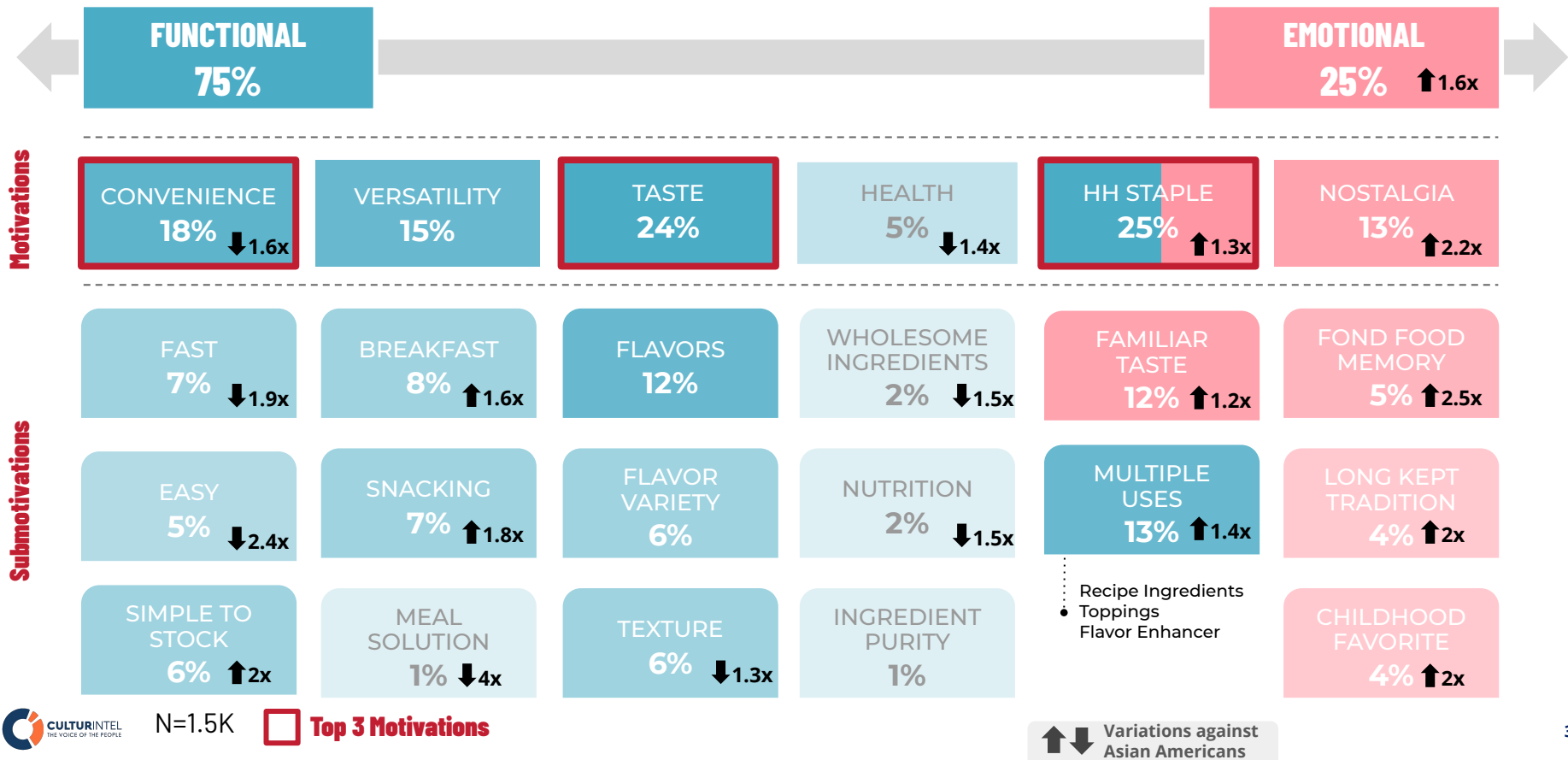
3

How does **aging** impact consumer behavior for **Asian Americans**?

Asian American Boomers are driven by household staples (25%) that are tasty (24%) and convenient (18%).

They are **emotionally** motivated by the category 1.6x more than other Asian Americans, especially because of the **nostalgia** (2.2x) associated to the brands and products they know. In contrast, they are less motivated by convenience (1.6x) and health (1.4x), but they value the **multiple uses** of these products (1.4x).

MOTIVATION DIAGRAM: Asian American Boomers



3

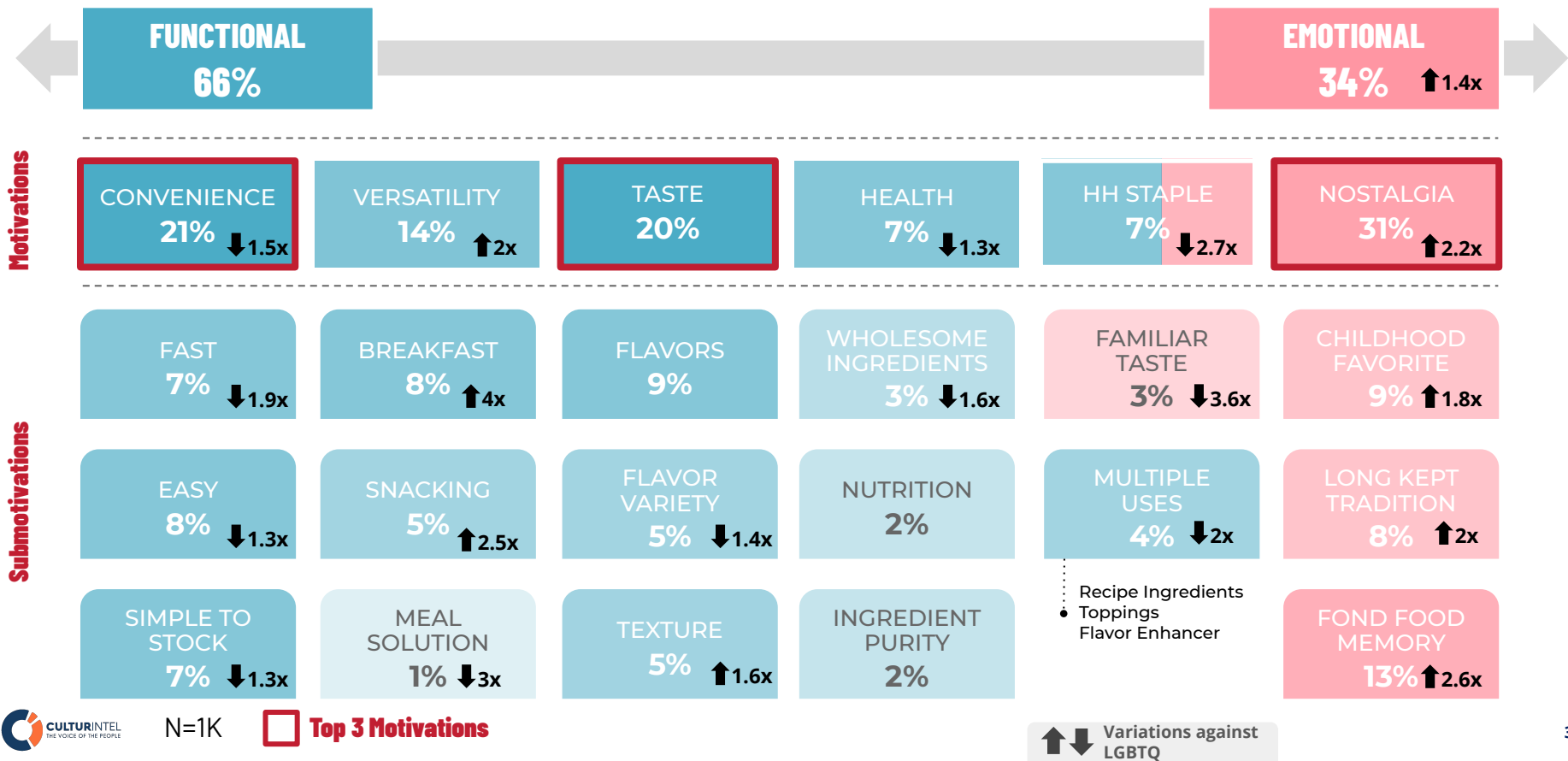
How does **aging** impact consumer behavior for **LGBTQ**?



LGBTQ are driven by traditional products that evoke **nostalgia** (31%), that are **convenient** (21%) and **tasty** (20%).

They are 1.4x more motivated by **emotional** aspects of the category, specifically **nostalgia** (2.2x more than other LGBTQ people), and less motivated by convenience (1.5x) and health (1.3x). However, they value **versatility**, especially when **snacking** (2.5x).

MOTIVATION DIAGRAM: LGBTQ Boomers



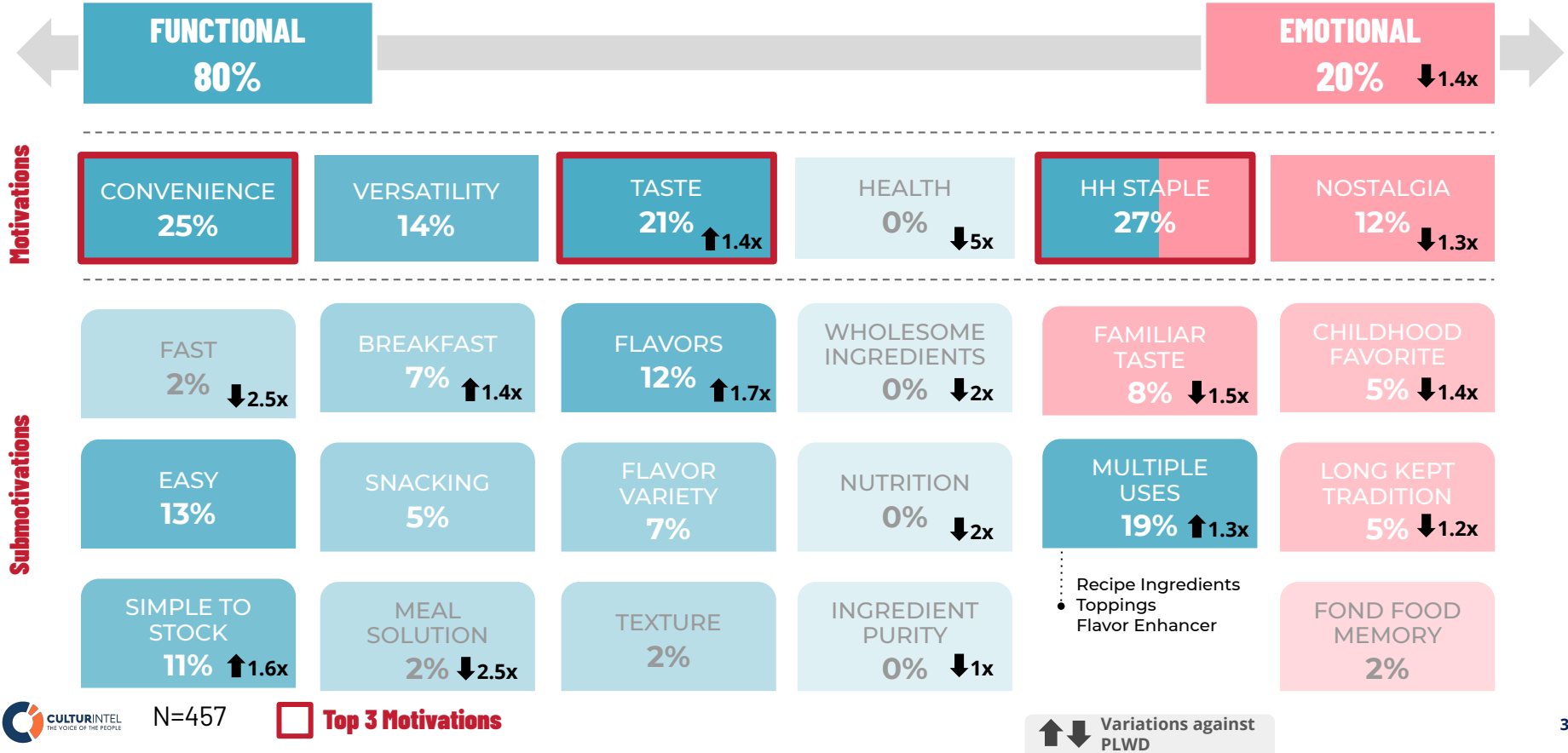
3

How does **aging** impact consumer behavior for **Boomers living with disabilities**?

Boomers living with disabilities are driven by household staples (27%) that are convenient (25%) and tasty (21%).

They are still more focused on the **functional** motivations of the category, especially **flavors** (1.7x), **stocking simplicity** (1.6x) and its uses during **breakfast** (1.4x).

MOTIVATION DIAGRAM: Boomers Living With Disabilities



Appendix



Definition of the RTEC Category

Category	Parent
Cereal	Kellogg, General Mills, PepsiCo, Post

Definition of the RTEC Category

Product Category	Parent	Brand
CEREAL	KELLOGG	KASHI CEREAL
CEREAL	KELLOGG	KASHI GO CEREAL
CEREAL	KELLOGG	KASHI GOLEAN CEREAL
CEREAL	KELLOGG	KELLOGG'S APPLE JACKS CEREAL
CEREAL	KELLOGG	KELLOGG'S CEREAL
CEREAL	KELLOGG	KELLOGG'S FROOT LOOPS CEREAL
CEREAL	KELLOGG	KELLOGG'S FROSTED FLAKES CEREAL
CEREAL	KELLOGG	KELLOGG'S FROSTED MINI-WHEATS CEREAL
CEREAL	KELLOGG	KELLOGG'S MINECRAFT CREEPER CRUNCH CEREAL
CEREAL	KELLOGG	KELLOGG'S RAISIN BRAN CEREAL
CEREAL	KELLOGG	KELLOGG'S RAISIN BRAN CRUNCH CEREAL
CEREAL	KELLOGG	KELLOGG'S RICE KRISPIES CEREAL
CEREAL	KELLOGG	KELLOGG'S RICE KRISPIES TREATS CEREAL
CEREAL	KELLOGG	KELLOGG'S SPECIAL K CEREAL
CEREAL	KELLOGG	KELLOGG'S TIGER PAWS CEREAL

Definition of the RTEC Category

Product Category	Parent	Brand
CEREAL	GENERAL MILLS, INC.	BIG G CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G CHEERIOS CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G CHEX CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G CINNAMON TOAST CRUNCH CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G LUCKY CHARMS CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G REESE'S PUFFS CEREAL
CEREAL	GENERAL MILLS, INC.	BIG G WHEATIES CEREAL
CEREAL	GENERAL MILLS, INC.	GENERAL MILLS CEREAL
CEREAL	GENERAL MILLS, INC.	GENERAL MILLS CHEERIOS CEREAL CEREAL
CEREAL	GENERAL MILLS, INC.	GENERAL MILLS CHEX CEREAL CEREAL
CEREAL	GENERAL MILLS, INC.	GIRL SCOUTS CEREAL
CEREAL	GENERAL MILLS, INC.	LUCKY CHARMS FROSTED FLAKES CEREAL

Definition of the RTEC Category

Product Category	Parent	Brand
CEREAL	GENERAL MILLS INC	NATURE VALLEY CEREAL
CEREAL	PEPSICO	QUAKER CAP'N CRUNCH CEREAL
CEREAL	PEPSICO	QUAKER CEREAL
CEREAL	PEPSICO	QUAKER LIFE CEREAL
CEREAL	PEPSICO	QUAKER OATMEAL SQUARES CEREAL
CEREAL	POST	POST CEREAL
CEREAL	POST	POST COCOA PEBBLES CEREAL
CEREAL	POST	POST FRUITY PEBBLES CEREAL
CEREAL	POST	POST GOLDEN CRISP CEREAL
CEREAL	POST	POST GREAT GRAINS CEREAL
CEREAL	POST	POST HONEY BUNCHES OF OATS CEREAL
CEREAL	POST	POST HONEY-COMB CEREAL

Definition of the RTEC Category

Product Category	Parent	Brand
CEREAL	POST	POST HOSTESS CEREAL
CEREAL	POST	POST OREO O'S CEREAL
CEREAL	POST	POST PEBBLES CEREAL

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