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VEGGIE PRODUCTS

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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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AWARDED BY





Table of Contents

Key Burning Questions

1

What are the **motivations** to consume Veggie Products?

#8-11

2

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

#12-23

3

How does **aging** impact consumer behavior in each segment?

#24-37

Veggie: Our Universe of Conversations

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



CulturIntel analyzed



192.3K

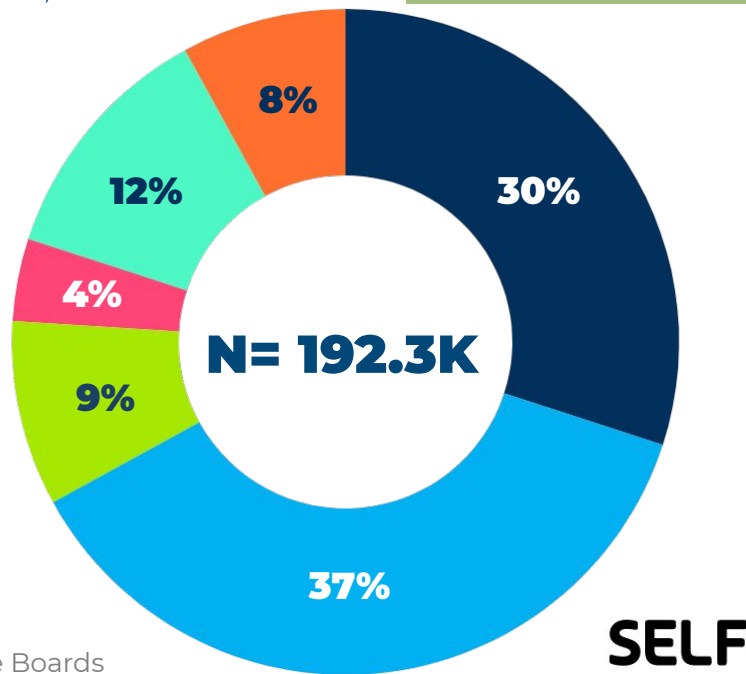
Relevant digital conversations about Veggie.*

General:

- Black Americans - 17.4K
- Hispanics - 13.2K
- Asian Americans - 7.8K
- LGBTQ - 5.7K
- Living w/Disabilities - 1K

Boomers:

- All Boomers - 14.5K
- Black Americans - 1.2K
- Hispanics - 785
- Asian Americans - 403
- LGBTQ - 3.3K
- Living w/Disabilities- 95



- 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

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 Veggie products?

Straight from the conversations, we identified 3 motivations to consume Veggie products that range from functional benefits associated to the category to self expressive benefits.

FUNCTIONAL

SELF-EXPRESSIVE

EXPANDED
FOOD OPTIONS

Ability to consume a wide range of products and recipes beyond a traditional diet.

“ I can finally enjoy a good burger again and still stay away from meat ”

PLANT-BASED
NUTRITION

Diet based solely on fruits and vegetables, but also nuts, seeds, oils, whole grains, legumes, and beans. A choice they make to express who they are.

“ There is plenty of everything that is needed in vegetarian food. ”

ETHICAL
RESPONSIBILITY

Acting upon individual principles and values in the context of diet selection.

“ When I saw how food animals were treated, it shocked the hell out of me!!! I didn't know about any of the truth! That's what really stopped me, for ethical reasons. ”

1

What are the **motivations** to consume Veggie products?

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

FUNCTIONAL

SELF-EXPRESSIVE

Motivations:

EXPANDED
FOOD OPTIONS

Ability to consume a wide range of products and recipes beyond a traditional diet.

PLANT-BASED
NUTRITION

Diet based solely on fruits and vegetables, but also nuts, seeds, oils, whole grains, legumes, and beans. A choice they make to express who they are.

ETHICAL
RESPONSIBILITY

Acting upon individual principles and values in the context of diet selection.

Submotivations:

Permission to indulge
New dishes & recipes

Climate
Animal rights



1

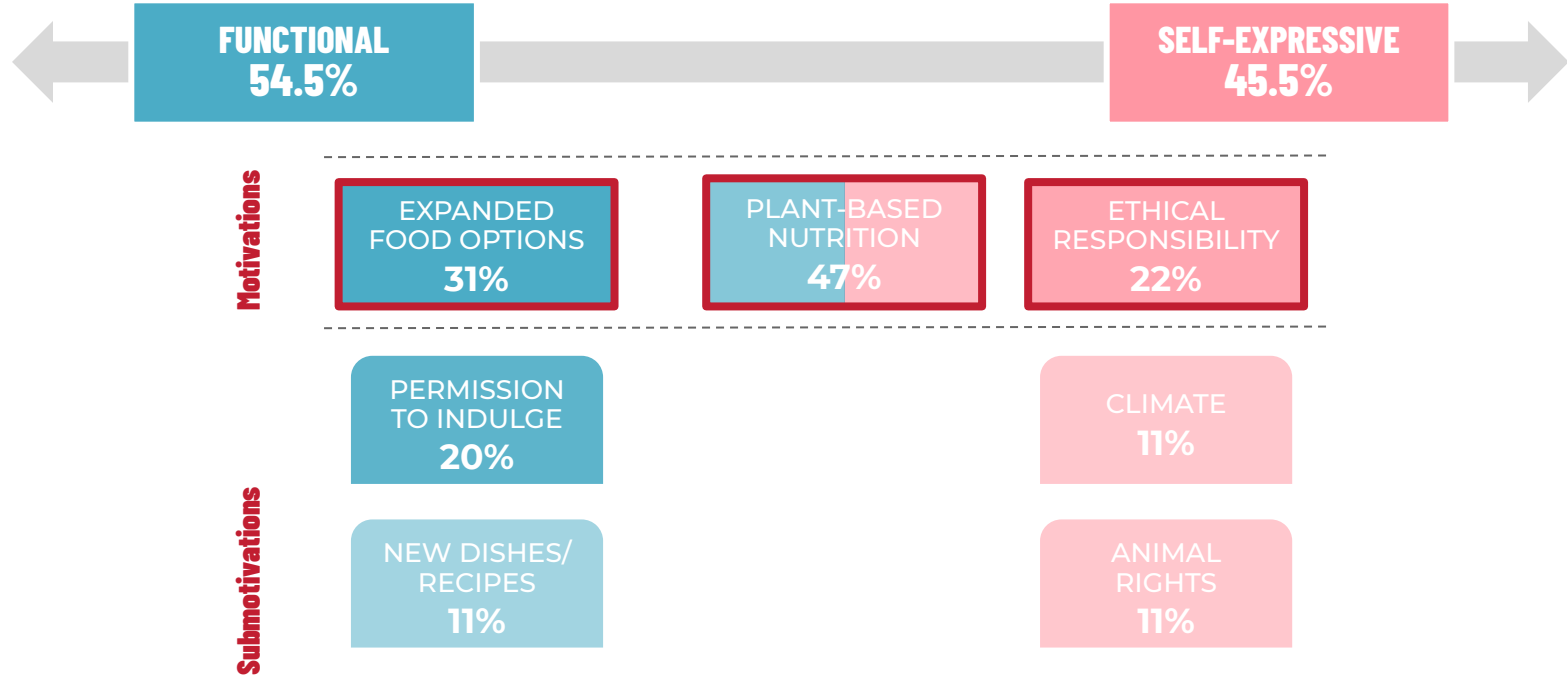
What are the **motivations** to consume Veggie Products?

The Overall Population is driven to eat veggie products for 3 reasons:

1. They are part of a by plant-based nutritional diet (47%),
2. They offer alternative food options (31%),
3. They align with internal values such as ethical responsibility (22%).

A bit over half of the motivations to consume Veggie products are driven by the **functional benefits** they associate with the category. The other half of the conversations indicate a **self-expressive connection** to the category based on their **ethical responsibility** in their consumption of food.

MOTIVATION DIAGRAM: Overall Population



MOTIVATION SUMMARY SLIDE: Overall Segments

	OVERALL N=192.3K	BLACK AMERICANS N=17.4K	HISPANICS N=13.2K	ASIAN AMERICANS N=7.8K	LGBTQ N=5.7K	P. W/DISABILITIES N=1K
MOTIVATION #1	PLANT-BASED NUTRITION 47%	PLANT-BASED NUTRITION 46%	PLANT-BASED NUTRITION 46%	PLANT-BASED NUTRITION 46%	PLANT-BASED NUTRITION 45%	EXPANDED FOOD OPTIONS 41% Permission to indulge 23% New dishes/recipes 18%
MOTIVATION #2	EXPANDED FOOD OPTIONS 31% Permission to indulge 20% New dishes/recipes 11%	EXPANDED FOOD OPTIONS 40% Permission to indulge 31% New dishes/recipes 9%	EXPANDED FOOD OPTIONS 33% Permission to indulge 19% New dishes/recipes 14%	ETHICAL RESPONSIBILITY 28% Climate 17% Animal rights 11%	ETHICAL RESPONSIBILITY 34% Animal rights 18% Climate 16%	PLANT-BASED NUTRITION 40%
MOTIVATION #3	ETHICAL RESPONSIBILITY 22% Climate 11% Animal rights 11%	ETHICAL RESPONSIBILITY 14% Climate 7% Animal rights 7%	ETHICAL RESPONSIBILITY 21% Climate 12% Animal rights 9%	EXPANDED FOOD OPTIONS 26% Permission to indulge 14% New dishes/recipes 12%	EXPANDED FOOD OPTIONS 21% Permission to indulge 14% New dishes/recipes 7%	ETHICAL RESPONSIBILITY 19% Animal rights 10% Climate 9%

MOTIVATION SUMMARY SLIDE: Segments

BLACK AMERICANS

They consume veggie products because they are part of a plant-based diet but also because it gives them more **food alternatives** and the ability to **indulge while sticking to their diet.**

As Black Americans get more health-conscious and keep a close eye on what they put in their body, veggie products offer a win win solution for them. They help them indulge without guilt as they can stick to a plant-based diet.

HISPANICS

They consume veggie products because they are part of a plant-based diet but also because it gives them more **food alternatives** and the ability to add **diversity to their dishes and recipes** and **enjoyment** while sticking to their diet.

As much as Hispanics are getting more health-conscious, they do not want to sacrifice the pleasure that food brings to them. That's why veggie products can be a win win solution for them, helping them get healthier while bringing diversity and not sacrificing on taste and enjoyment.

ASIAN AMERICANS

They consume veggie products because they are part of a plant-based diet but also because they align with **their value of being ethically responsible** and especially reduce their impact on the **climate.**

As a community which culturally sees each individual as part of the whole ecosystem, consuming plant-based products help them stay healthy while limiting the impact on the balance of the full ecosystem.

LGBTQ

They consume veggie products because they are part of a plant-based nutritional diet but also because they align with **their value of being ethically responsible** and especially respect **animal rights** and reduce their impact on the **climate.**

For them, plant-based products are a way to be healthier while making a statement about who they are.

P. W/DISABILITIES

They consume veggie products because they offer **alternative food options** and **add diversity to their dishes and recipes** while providing them **plant-based nutrition.**

That may be influenced by the fact that they have some diet restrictions due to their type of disabilities.

A close-up photograph of a bowl filled with a textured, golden-brown food item, possibly a salad or a dish of grains and vegetables. The bowl has a decorative blue and white patterned rim. The background is a soft, out-of-focus light brown.

2

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

Expanded food options:

"To the guys who think you need to eat meat - try these. You'll love them."

Nutrition:

"They are full of protein and fiber, which is a real plus!"

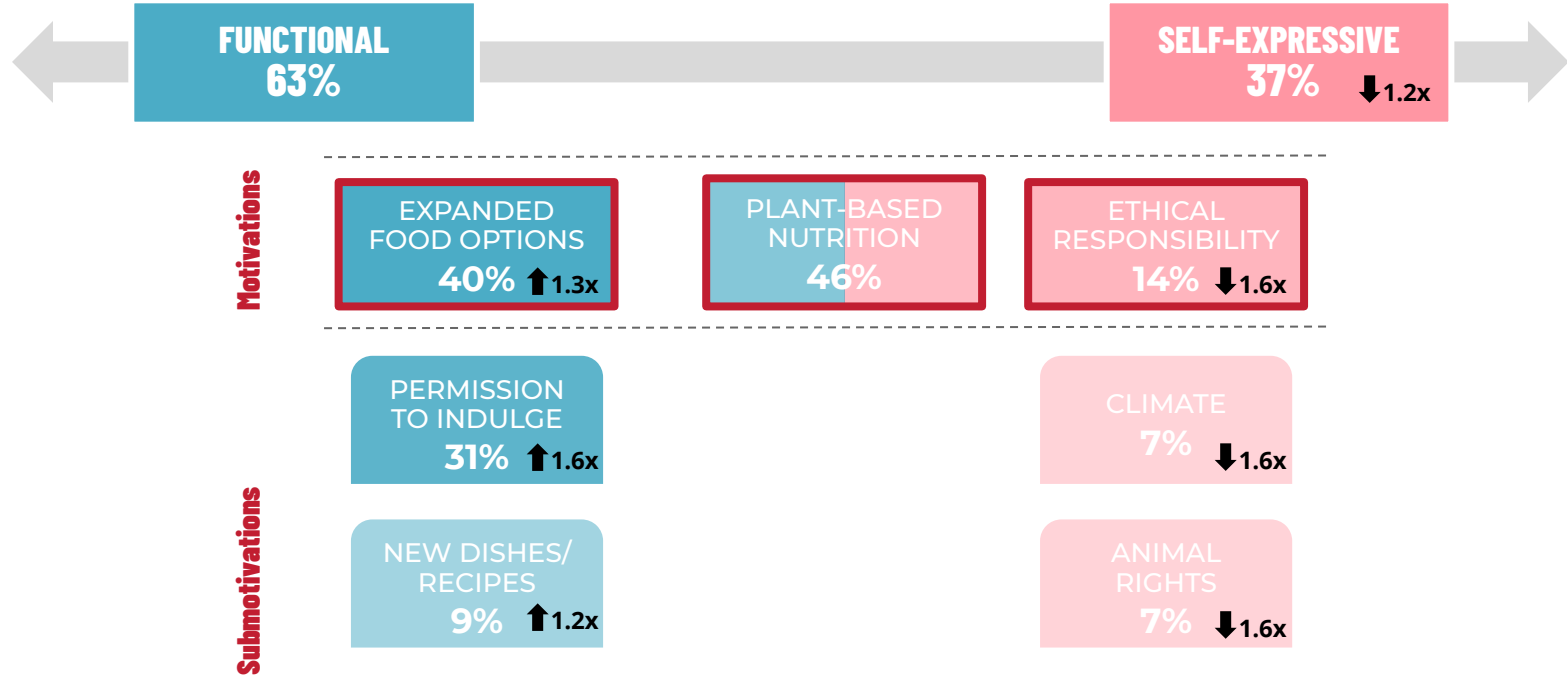
Ethical responsibility:

"I am beyond thrilled that those of us who don't feel good about meat industry finally have such awesome options now!"

Black Americans are driven by plant-based nutrition (46%), expanded food options (40%) and less by ethical responsibility (14%).

They have different motivations than the overall population. **They focus more on functional motivations** rather than self-expressive ones. In fact, they are more motivated by **expanded food options** (1.3x), especially the ability to indulge without guilt. This motivation makes up almost half of their drivers to consume. They are less driven by ethical responsibility (1.6x).

MOTIVATION DIAGRAM: Black Americans



A close-up photograph of a person's hands holding a large, multi-layered burger. The burger has a thick, browned patty, melted cheese, and various toppings including green herbs and pickles. The person's hands are visible, with fingers gripping the sides of the burger. The background is slightly blurred, showing more of the person's face and hands.

2

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

Expanded food options:

"A must try for vegans and people who miss a good burger now and then"

Nutrition:

"This is a great sustainable and healthy option to regular meat"

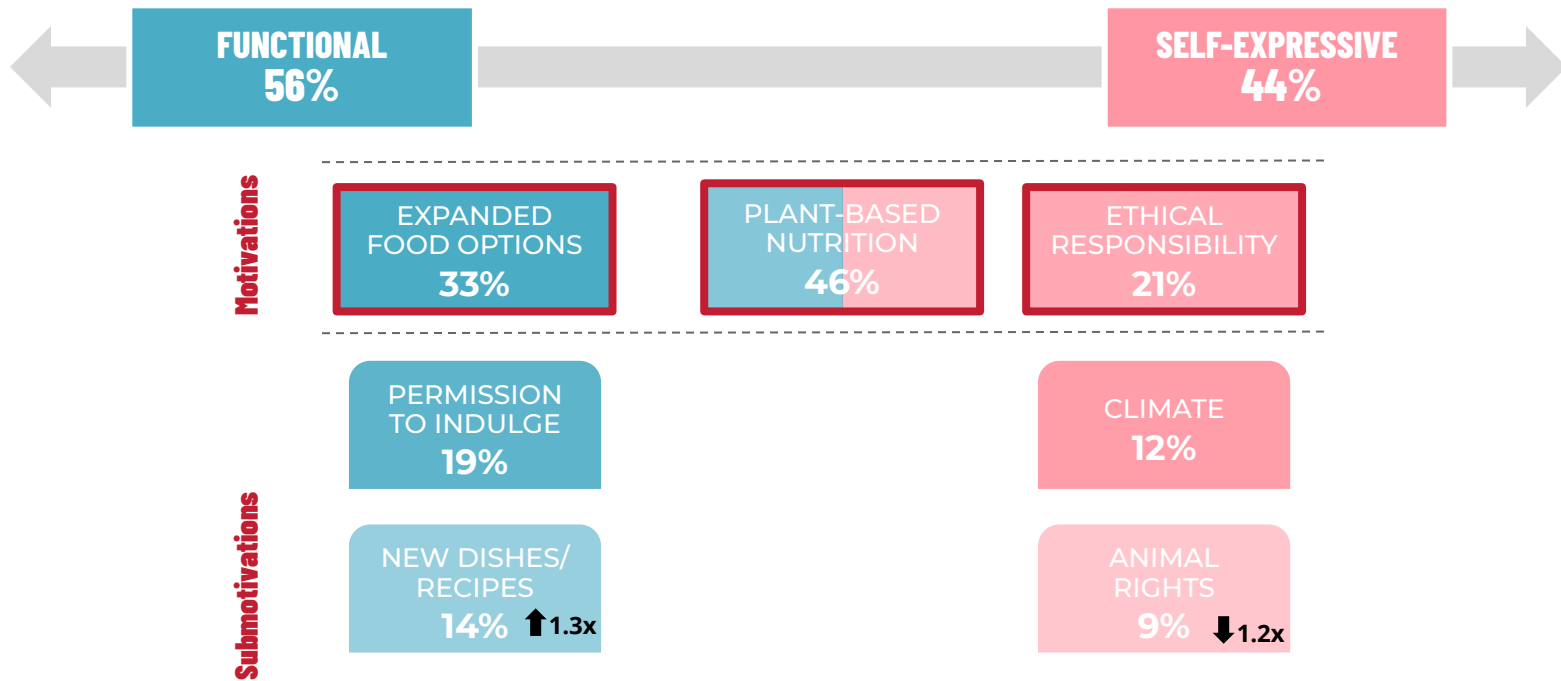
Ethical responsibility:

"This burger fills you up, tastes delicious, and are super easy to cook at home! and NO impact on climate!"

Hispanics share some similarities with the overall population. They are driven by plant-based nutrition (46%), expanded food options (33%) and ethical responsibility (21%) in line with the overall population.

They tend to focus more on the functional motivations than the self-expressive ones. They are motivated by **expanded food options**. They appreciate veggie products as they offer **new recipes and dishes** (1.3x).

MOTIVATION DIAGRAM: Hispanics



N=9.9K

 Top 3 Motivations

  Variations against Overall



2

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

Expanded food options:

"I'm absolutely obsessed with beyond meat. I'm not a vegetarian nor am I vegan but I don't eat red meat so I was happy when this brand became more widely available."

Nutrition:

"does an excellent job of keeping things healthy, delicious, & easy"

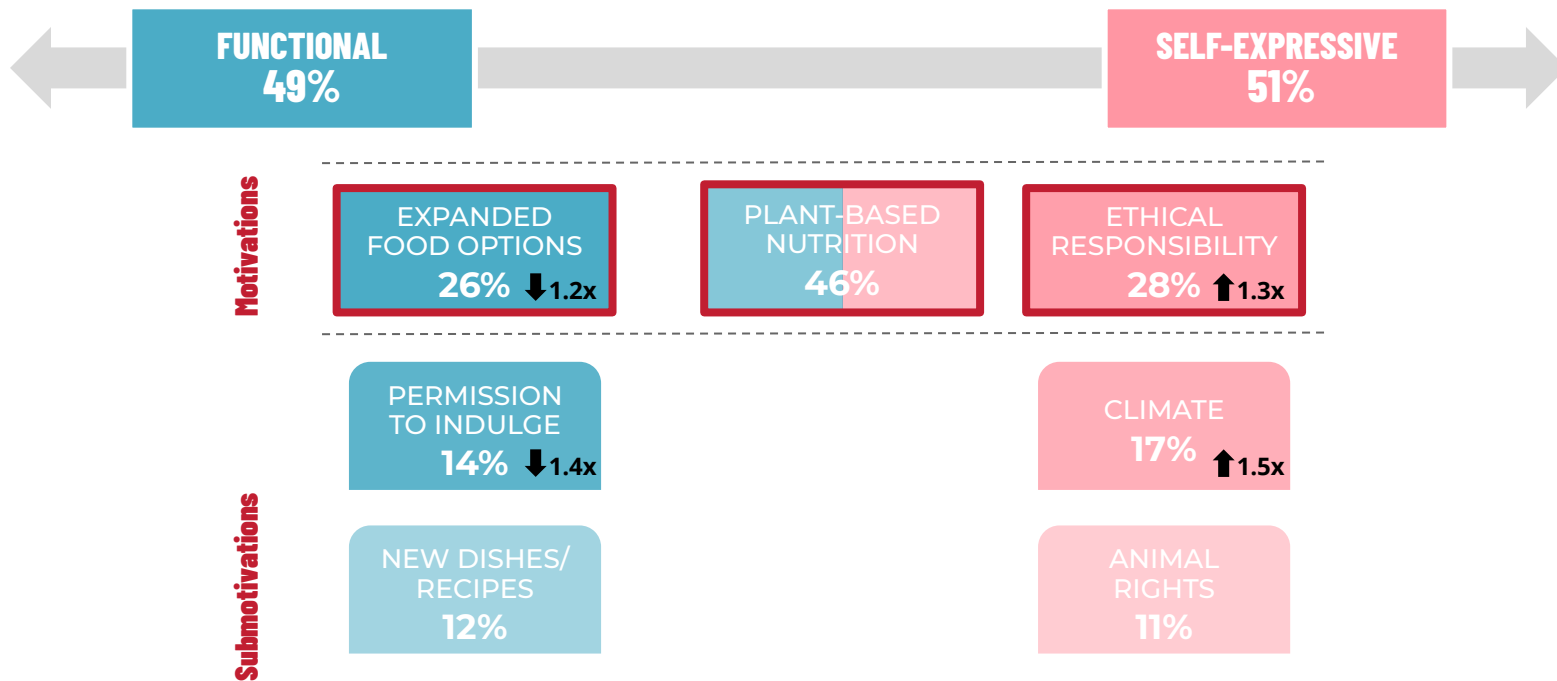
Ethical responsibility:

"meat without the guilt"

Asian Americans are driven by plant-based nutrition (46%), ethical responsibility (28%) and less by expanded food options (26%).

They **focus slightly more on self-expressive motivations** rather than functional ones. **Ethical responsibility** is 1.3x more relevant than for the overall population, especially the impact on the **climate** (1.5x).

MOTIVATION DIAGRAM: Asian Americans





2

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

Expanded food options:

"I've been vegan for about 5 yrs now. So glad there's a way to eat a juicy burger."

Nutrition:

"I like that it is free of GMOs, soy & gluten"

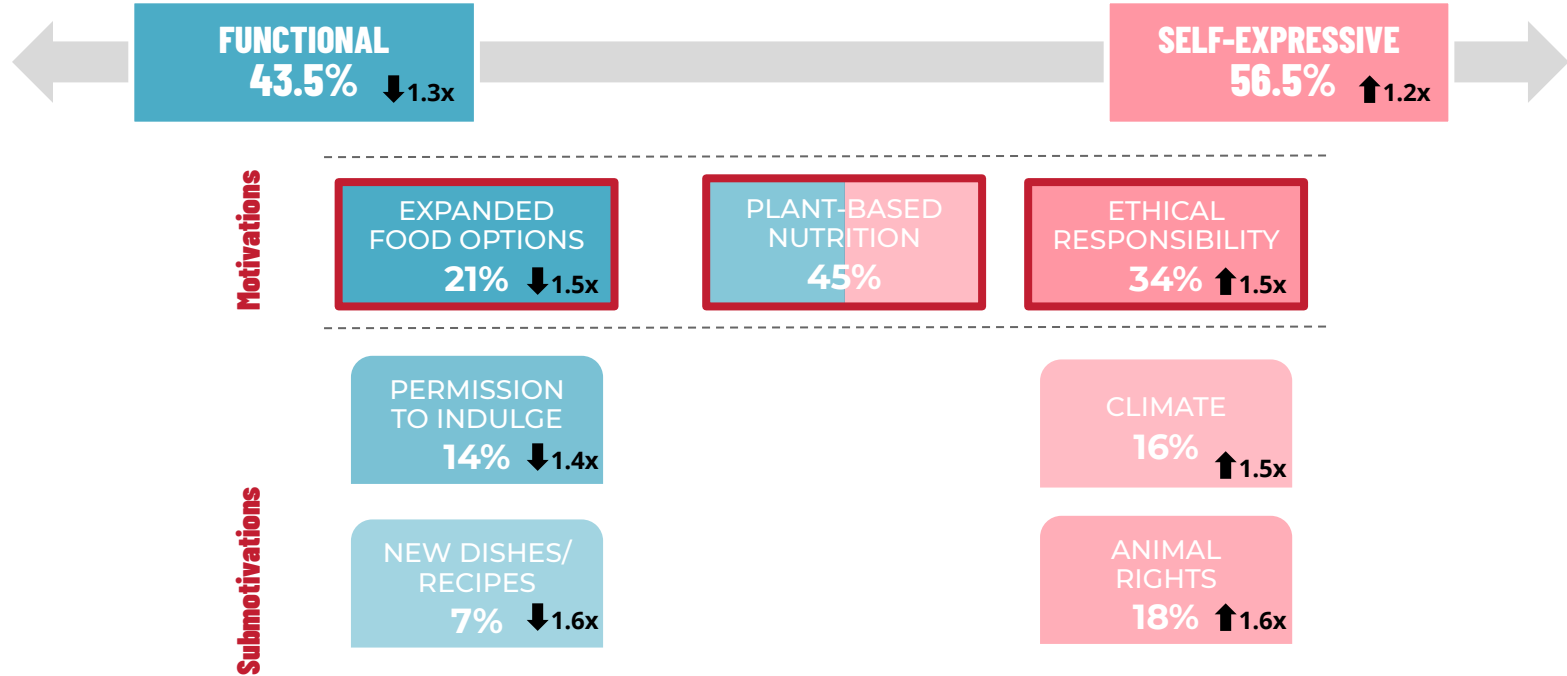
Ethical responsibility:

"to reduce your meat intake and save the world this is the best burger you can get. They are amazing!!!"

LGBTQ people are driven by plant-based nutrition (45%), ethical responsibility (34%) and less by expanded food options (21%).

They focus more on **self-expressive** motivations to consume Veggies. **Ethical responsibility** is 1.5x more relevant for this segment, driven by **animal rights** (1.6x) and the impact on the **climate** (1.5x). Conversely, they focus 1.3x less on functional motivations, and 1.5x less on **expanded food options**.

MOTIVATION DIAGRAM: LGBTQ





2

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

Expanded food options:

"I gave them a shot one day out of excitement to try all of the new plant based options coming out & I can proudly say I love a beyond meat hamburger!"

Nutrition:

"Love this protein filled product ! A healthy alternative to our traditional burger lunch."

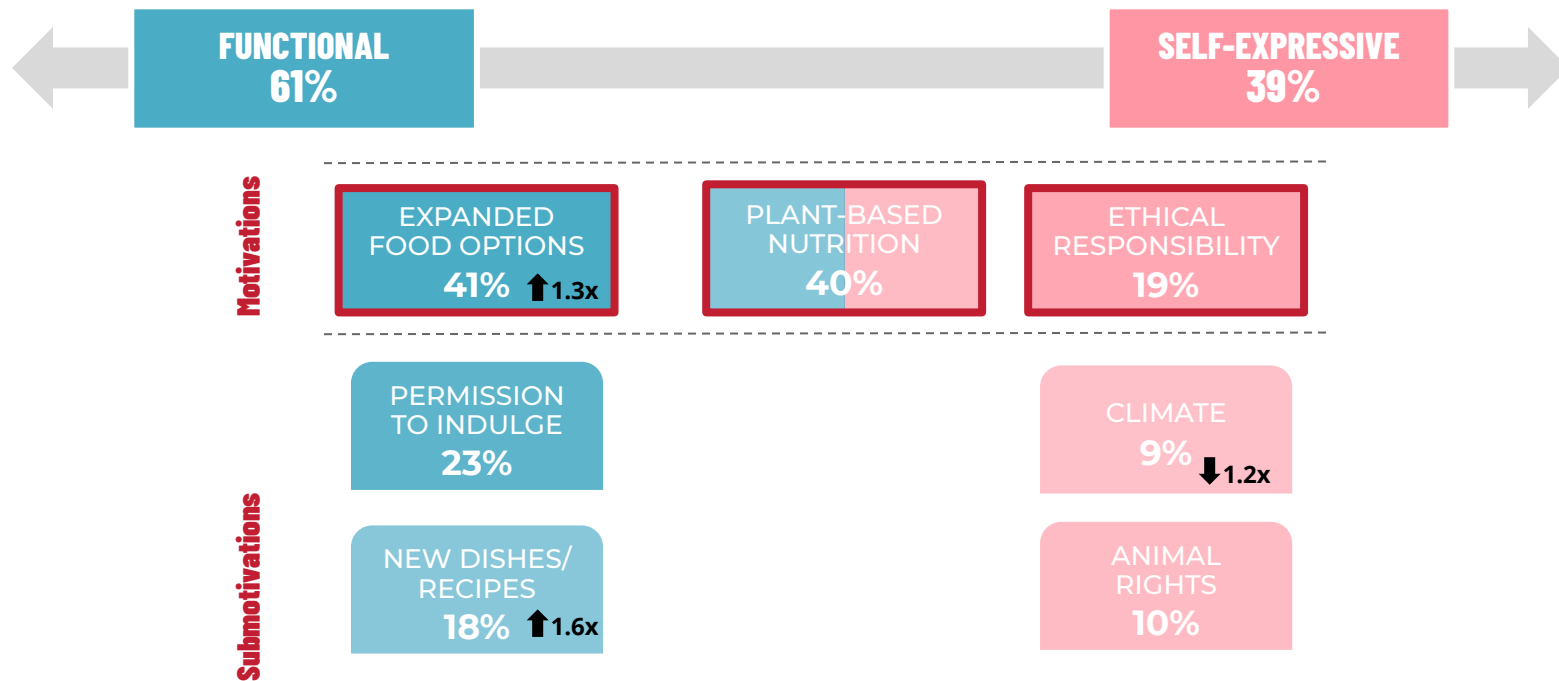
Ethical responsibility:

"recommend this for anyone transitioning to a more sustainable lifestyle"

People Living With Disabilities are driven by expanded food options (41%), plant-based nutrition (40%) and ethical responsibility (19%).

They focus more on **functional** benefits, especially **expanded food options** (1.3x) of which they value **new dishes and recipes** of the product 1.6x more than the overall. They are 1.2x less focused on climate.

MOTIVATION DIAGRAM: People Living With Disabilities



A close-up photograph of a light-colored ceramic bowl filled with granola and fresh blueberries. The granola consists of various nuts, seeds, and dried fruits, appearing golden-brown and textured. The blueberries are vibrant blue and clustered in the foreground. The background is softly blurred, showing more of the bowl and its contents.

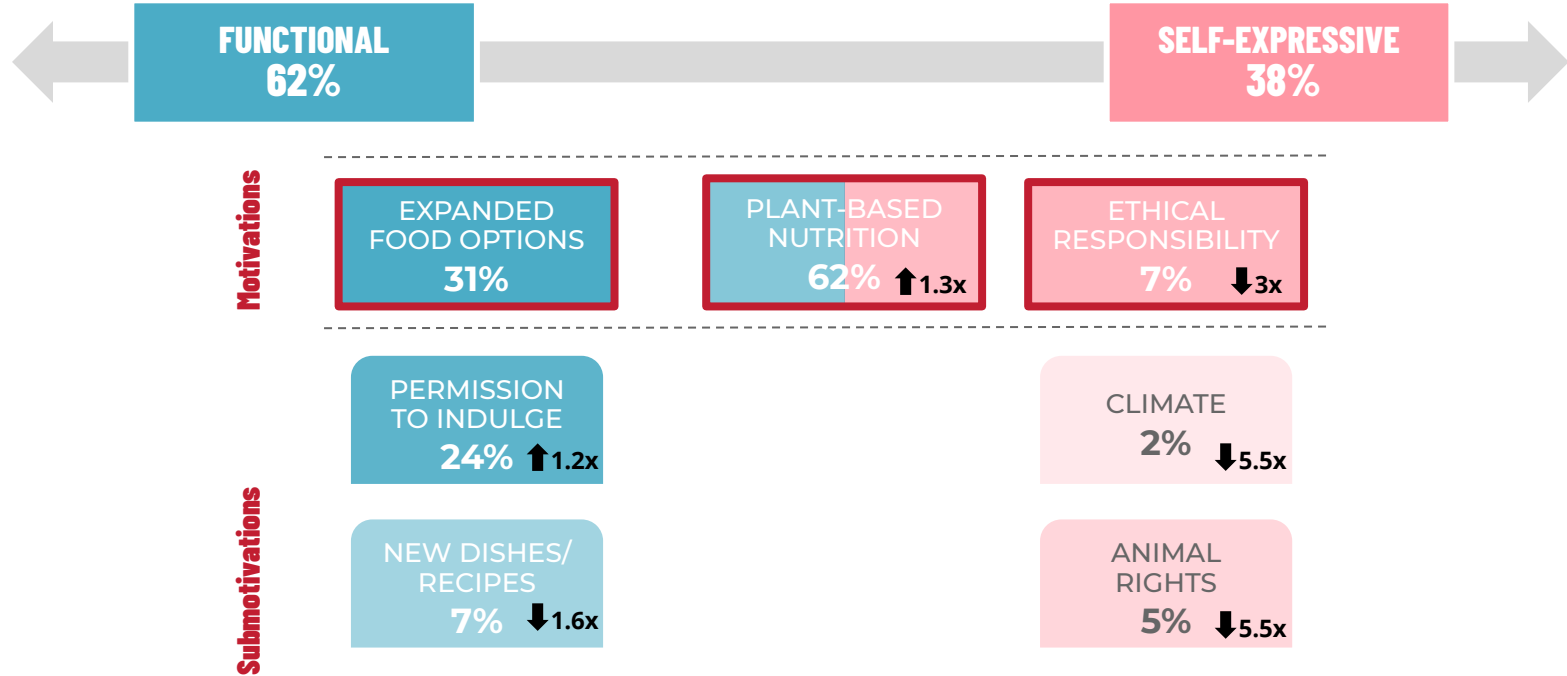
3

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

Overall Boomers are driven by plant-based nutrition (62%), expanded food options (31%) and ethical responsibility (7%).

Their consumption is **more driven by functional motivations**. In fact, their motivations are more focused on **plant-based nutrition** (1.3x) that give them a permission to indulge (1.2X) and less on **ethical responsibility** (3x), climate (5.5x) and animal rights (5.5x) vs. the overall population.

MOTIVATION DIAGRAM: Overall Boomers



MOTIVATION SUMMARY SLIDE: Boomers Segments

	OVERALL N=14.5K	BLACK AMERICANS N=1.2K	HISPANICS N=785	ASIAN AMERICANS N=403	LGBTQ N=3.3K	P. W/DISABILITIES N=95
MOTIVATION #1	PLANT-BASED NUTRITION 62%	EXPANDED FOOD OPTIONS 56% Permission to indulge 49% New dishes/ recipes 7%	EXPANDED FOOD OPTIONS 53% Permission to indulge 36% New dishes/ recipes 17%	PLANT-BASED NUTRITION 49%	PLANT-BASED NUTRITION 42%	PLANT-BASED NUTRITION 53%
MOTIVATION #2	EXPANDED FOOD OPTIONS 31% Permission to indulge 24% New dishes/ recipes 7%	PLANT-BASED NUTRITION 42%	PLANT-BASED NUTRITION 46%	EXPANDED FOOD OPTIONS 33% Permission to indulge 21% New dishes/ recipes 12%	ETHICAL RESPONSIBILITY 31% Animal rights 16% Climate 15%	EXPANDED FOOD OPTIONS 43% Permission to indulge 31% New dishes/ recipes 12%
MOTIVATION #3	ETHICAL RESPONSIBILITY 7% Animal rights 5% Climate 2%	ETHICAL RESPONSIBILITY 2% Climate 1% Animal rights 1%	ETHICAL RESPONSIBILITY 1% Animal rights 1% Climate 0%	ETHICAL RESPONSIBILITY 18% Animal rights 10% Climate 8%	EXPANDED FOOD OPTIONS 27% Permission to indulge 16% New dishes/ recipes 11%	ETHICAL RESPONSIBILITY 3% Animal rights 2% Climate 1%

MOTIVATION SUMMARY SLIDE: Boomer Segments

BLACK AMERICAN BOOMERS

With age, the ability to **indulge** becomes even more of a motivation for them to consume veggie products while **sticking to a plant-based diet**.

While they are disproportionately affected by health conditions such as obesity, hypertension and diabetes, sticking to a plant-based diet while not compromising on indulgence is key to stay healthy.

HISPANIC BOOMERS

Similarly to Black American Boomers, Hispanic Boomers become more motivated by the ability to **indulge** and to add **diversity to their dishes** that veggie products provide.

They are also disproportionately affected by health conditions and believe that nutrition is a key lever to stay healthy. Veggie products help them stay healthy while not compromising the pleasure they associate with food.

ASIAN AMERICAN BOOMERS

As they age, they are also more motivated by the **expansion of their food options** thanks to plant-based products while **sticking to a plant-based nutritional diet**.

Their cultural values such as their ethical responsibility to the environment and animals remains, yet the need to stay healthy while still enjoying food becomes even more relevant.

LGBTQ BOOMERS

As they age, they are still motivated by the **nutritional aspect of a plant-based diet that aligns with their values**.

However, just like other Boomers, the **diversity and indulgence** veggie products provide also appeals to them.

For them, plant-based products are still a way to be healthier while making a statement about who they are and bring some diversity to their diet.

P. W/DISABILITIES BOOMER

As they age, they are more motivated by the **nutritional benefits of plant-based products**. The ability to **add diversity and indulgence** to their daily meals is a big plus for them.

Staying healthy becomes critical to manage their conditions and diet restrictions may play a key role in achieving that.

3

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

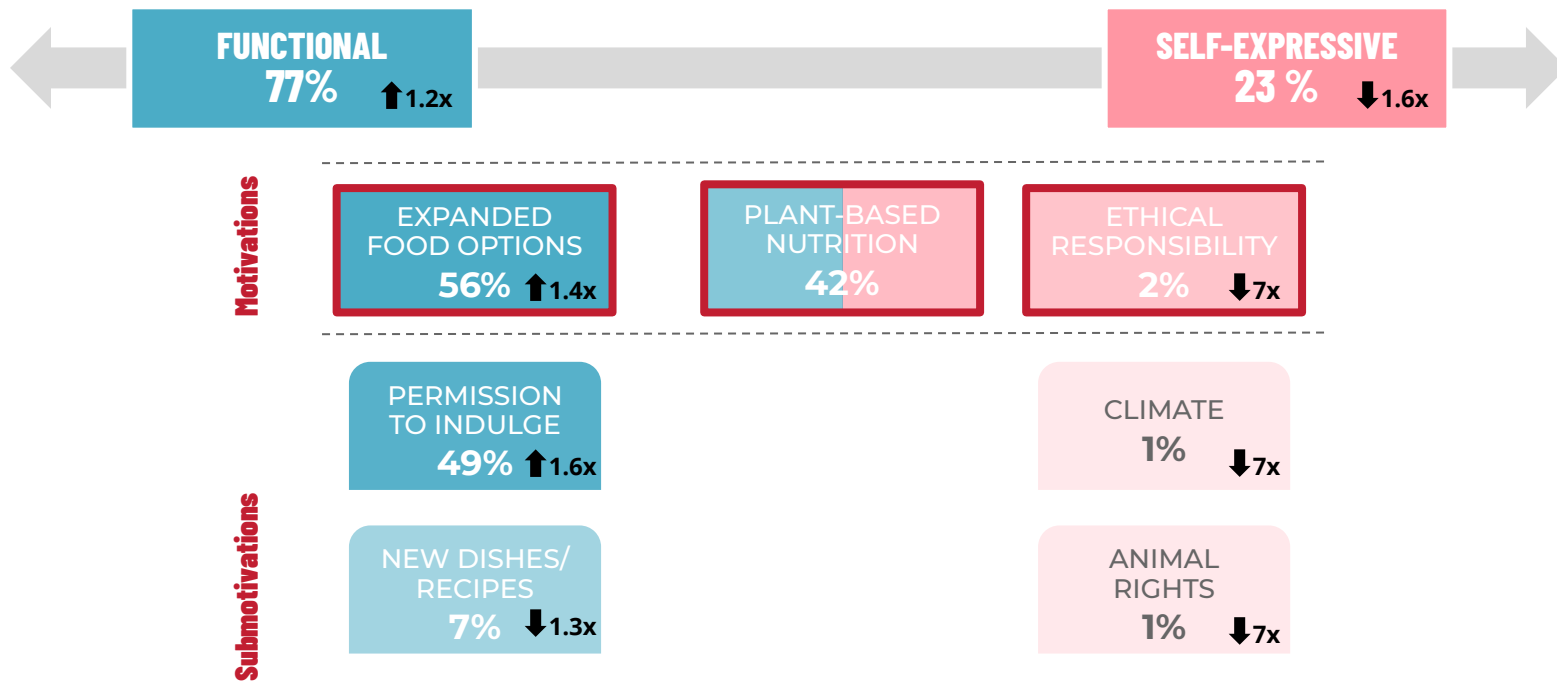


Black Americans Boomers are driven by expanded food options (56%), plant-based nutrition (42%) and less by ethical responsibility (2%).

Their consumption is **more driven by functional motivations** (1.4x).

With time, there seems to be a functional shift in the category. Their motivation is tied to the **permission to indulge** (1.6x). They are 7x less driven by ethical responsibility than overall Black Americans. Plant-based nutrition remains as a significant motivation.

MOTIVATION DIAGRAM: Black American Boomers



A top-down view of a white bowl with a dark rim, filled with granola, coconut flakes, and nuts. The granola is also scattered on the dark surface around the bowl. A small, round, metallic object is partially visible in the lower right quadrant of the bowl.

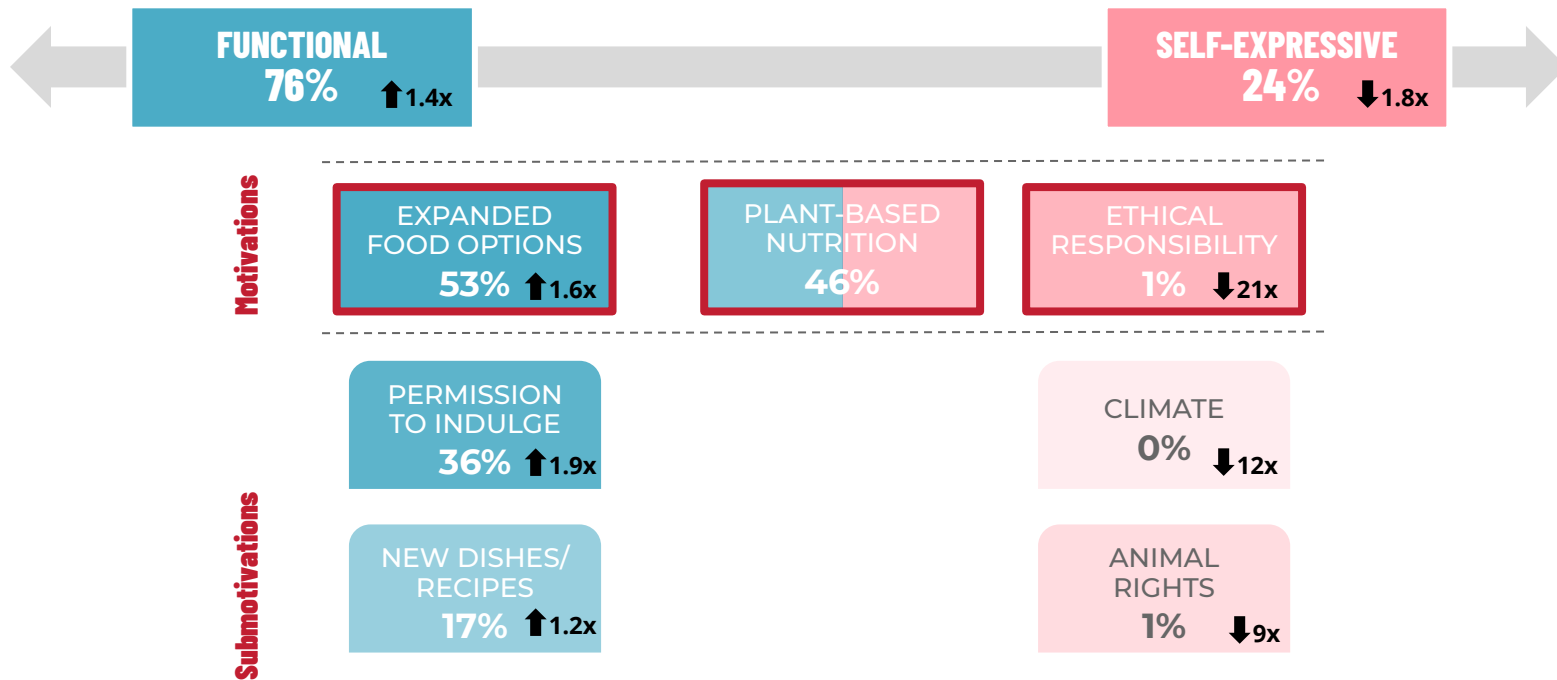
3

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

Hispanic Boomers are driven by expanded food options (53%), plant-based nutrition (46%) and less by ethical responsibility (1%).

For them, aging impacts their behavior towards Veggie products. The consumption of Hispanic Boomers is more **driven by functional motivations** (1.4x). They are more motivated by **expanded food options** (1.6x), especially **permission to indulge** (1.9x) and **new dishes & recipes** (1.2x) than overall Hispanics. They are (21x) less-driven by ethical responsibility.

MOTIVATION DIAGRAM: Hispanic Boomers





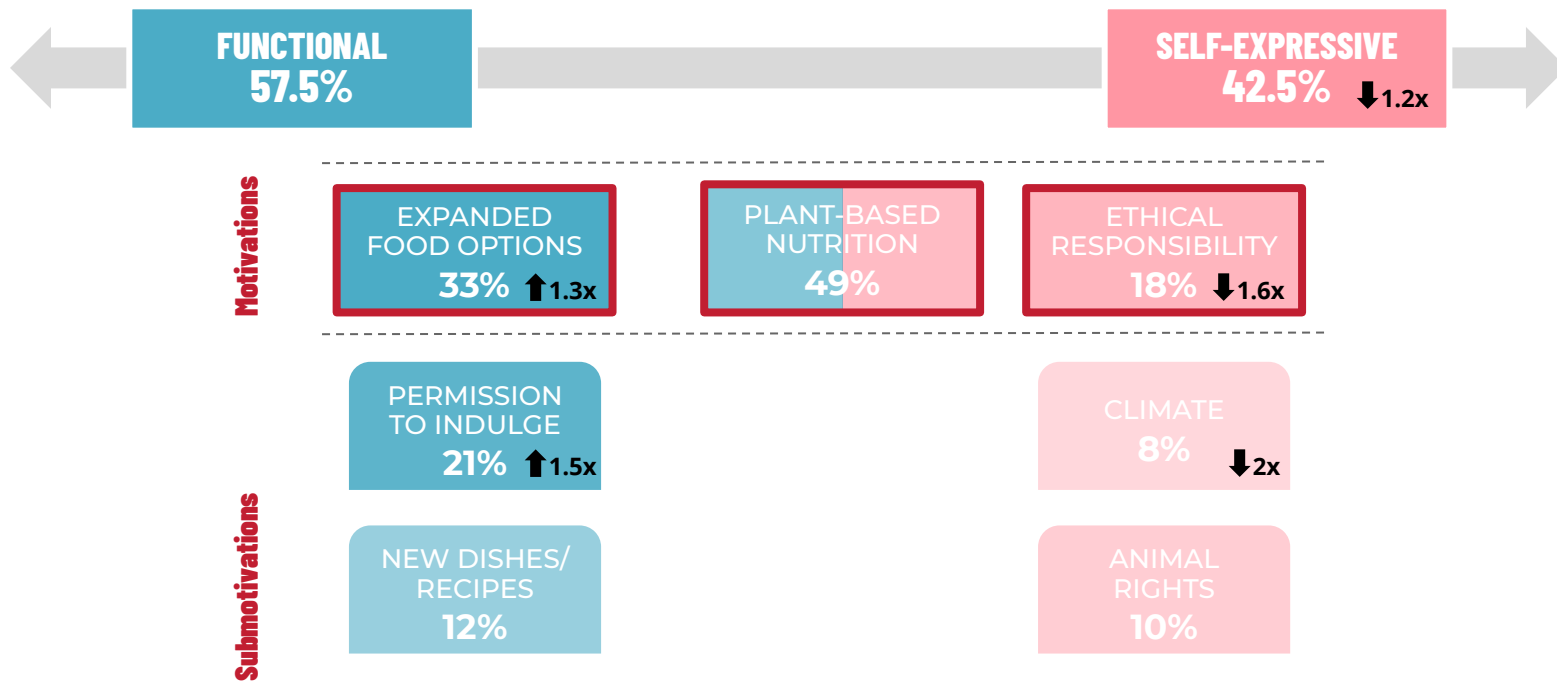
3

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

Asian American Boomers are driven by plant-based nutrition (49%), expanded food options (33%) and ethical responsibility (18%).

They are **functionally** motivated by the category 1.3x more than other Asian Americans, especially because of the **permission to indulge** (1.5x) associated to veggie products. They are less motivated by ethical responsibility (1.6x), and **climate** (2x) vs overall Asian Americans.

MOTIVATION DIAGRAM: Asian American Boomers





3

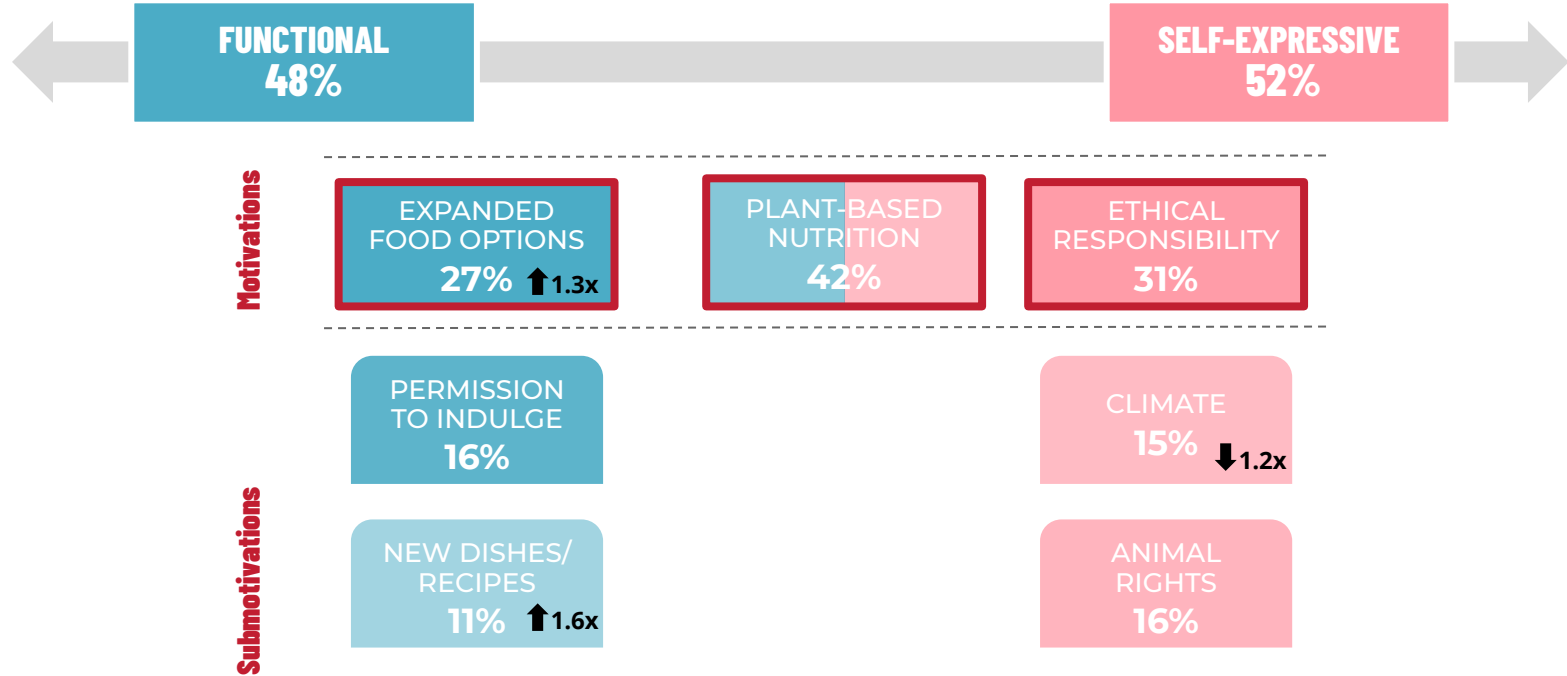
How does **aging** impact consumer behavior for **LGBTQ**?

LGBTQ Boomers veggie products consumption is driven by plant-based nutrition (42%), ethical responsibility (31%) and expanded food options (27%).

They remain slightly more motivated by **self-expressive motivations** than functional ones. They are 4.4x more motivated by being ethically responsible while consuming veggie products than overall Boomers. Conversely, they are less motivated by **climate** (1.2x) than overall LGBTQ.

They value **new recipes & dishes** 1.6x more than overall LGBTQ.

MOTIVATION DIAGRAM: LGBTQ Boomers



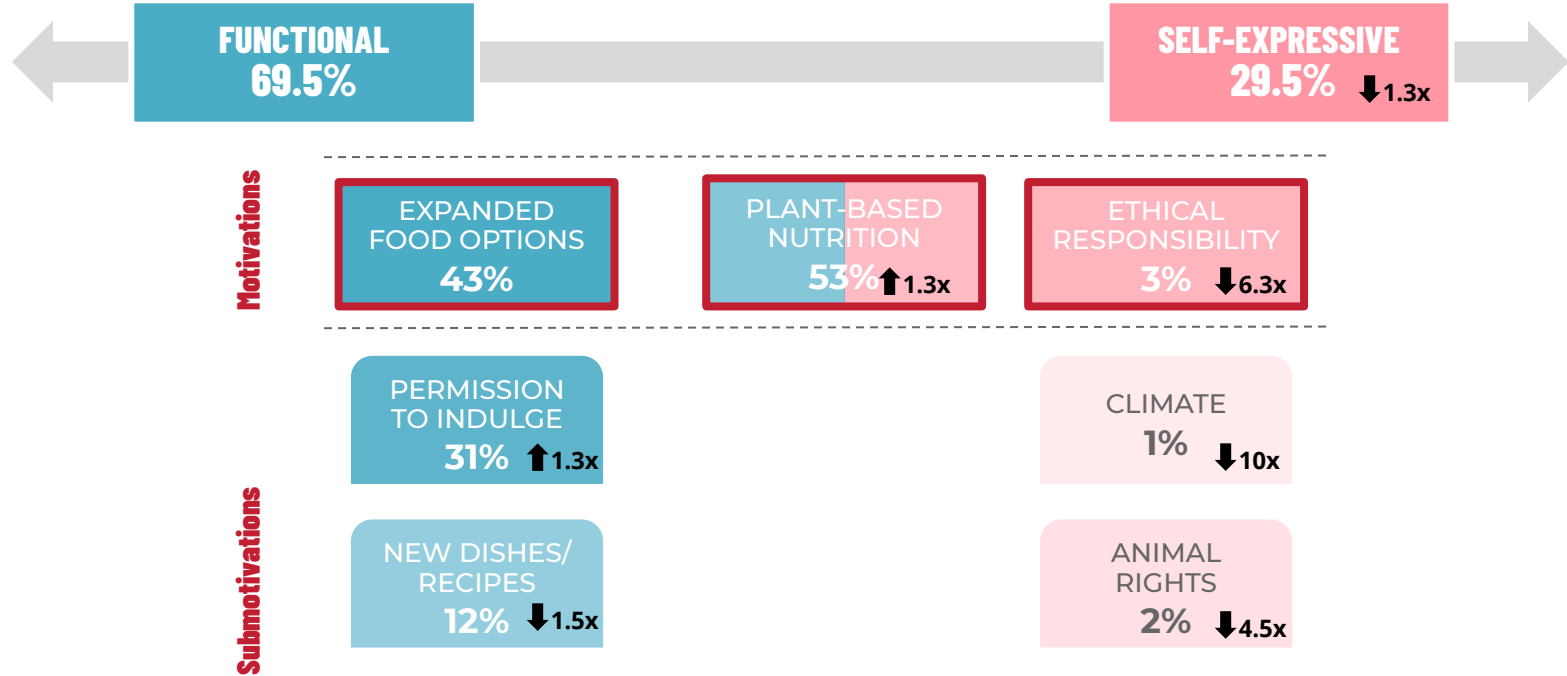
3

How does **aging** impact consumer behavior for **People With Disabilities**?

Veggie products consumption among Boomers Living with Disabilities is driven by plant-based nutrition (53%), expanded food options (43%) and less by a sense of ethical responsibility (3%).

They are still more focused on the **functional** motivations of the category, especially **plant-based nutrition** (1.3x), and the **permission to indulge** (1.3x). In contrast, they are less motivated by **ethical responsibility** (6.3x) than overall People With Disabilities.

MOTIVATION DIAGRAM: Boomers Living With Disabilities



Appendix



Definition of the Veggie Category

Category	Parent
Frozen	KELLOGG CO, MAPLE LEAF FOODS INC, CONAGRA BRANDS INC, CONAGRA FOODS INC, TYSON FOODS INC, BEYOND MEAT INC, AMY'S KITCHEN, IMPOSSIBLE FOODS
QSR	BURGER KING, DUNKIN, STARBUCKS, CHICK-FIL-A, SUBWAY, PANERA BREAD, MCDONALDS, TACO BELL
Meat (non-breakfast)	BEYOND MEAT INC, MAPLE LEAF FOODS INC, AMY'S KITCHEN, IMPOSSIBLE FOODS, CONAGRA BRANDS INC, CONAGRA FOODS INC

Definition of the Veggie Category

Product Category	Parent	Brand
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT BEYOND BEEF MEAT
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT BEYOND BEEF MEAT
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT BEYOND BURGER MEAT
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT BEYOND BURGER MEAT
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT MEAT
Meat (non-Breakfast)	BEYOND MEAT INC	BEYOND MEAT MEAT
Meat (non-Breakfast)	IMPOSSIBLE FOODS INC	IMPOSSIBLE BEEF
Frozen	KELLOGG CO	MORNINGSTAR FARMS ENTREES-FROZEN
Frozen	KELLOGG CO	MORNINGSTAR FARMS ENTREES-FROZEN CHORIZO CRUMBLES
Frozen	KELLOGG CO	MORNINGSTAR FARMS ENTREES-FROZEN SAUSAGE PATTIES
Frozen	KELLOGG CO	MORNINGSTAR FARMS ENTREES-FROZEN VEGGIE BURGER
Frozen	MAPLE LEAF FOODS INC	LIGHTLIFE ENTREES-FROZEN
Meat (non-Breakfast)	MAPLE LEAF FOODS INC	LIGHTLIFE PLANT-BASED BURGER MEAT
Meat (non-Breakfast)	MAPLE LEAF FOODS INC	LIGHTLIFE PLANT-BASED BURGER MEAT
Meat (non-Breakfast)	MAPLE LEAF FOODS INC	LIGHTLIFE PLANT-BASED GROUND MEAT
Meat (non-Breakfast)	MAPLE LEAF FOODS INC	LIGHTLIFE PLANT-BASED GROUND MEAT

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