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**February 2021**

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## FROZEN BREAKFAST



**Forbes**

Agency  
Council



**Certified  
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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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# Key Burning Questions

1

What are the **motivations** to consume Frozen Breakfast?

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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

# Frozen Breakfast: Our Universe of Conversations

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



CulturIntel analyzed



# 399K

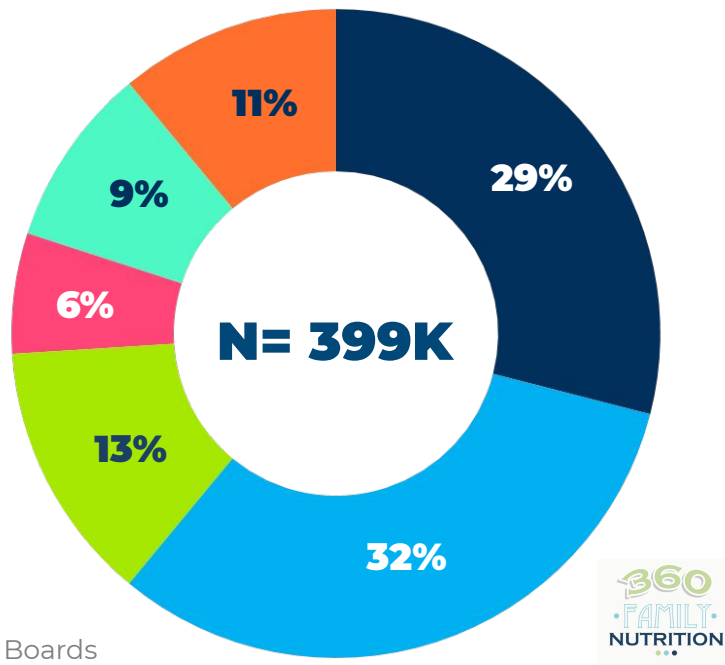
Relevant digital conversations about Frozen Breakfast.\*

## General:

- Black Americans - 36.4K
- Hispanics - 21.2K
- Asian Americans - 13.2K
- LGBTQ - 46.5K
- Living w/Disabilities - 3.1K

## Boomers:

- All Boomers - 29.2K
- Black Americans - 2.3K
- Hispanics - 1K
- Asian Americans - 996
- LGBTQ - 3.6K
- Living w/Disabilities- 183



- 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 Frozen Breakfast?

Straight from the conversations, we identified 4 motivations to consume Frozen Breakfast that range from functional benefits associated to the category to emotional benefits.

FUNCTIONAL

EMOTIONAL

## CONVENIENCE

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

“ The kids love making their own breakfast, and this is easy and fast to satisfy their appetites. ”

## VERSATILITY

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

“ Always a great choice for a breakfast treat or an anytime snack! ”

## TASTE

The overall experience and perception of flavor.

“ So yummy! We love having eggo's anytime of the day!!!! ”

NOSTALGIA/  
HERITAGE

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

“ These are as good as I remember from when I was a kid. ”

1

What are the **motivations** to consume Frozen Breakfast?

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

FUNCTIONAL

EMOTIONAL

**Motivations:**

CONVENIENCE

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

VERSATILITY

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

TASTE

The overall experience and perception of flavor.

NOSTALGIA/  
HERITAGE

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

**Submotivations:**

Fast  
Easy

Snacking  
Breakfast  
Non-Breakfast

Flavor  
Variety

Breakfast Ritual  
Fond food memory  
Childhood memory



1

What are the **motivations** to consume Frozen Breakfast?

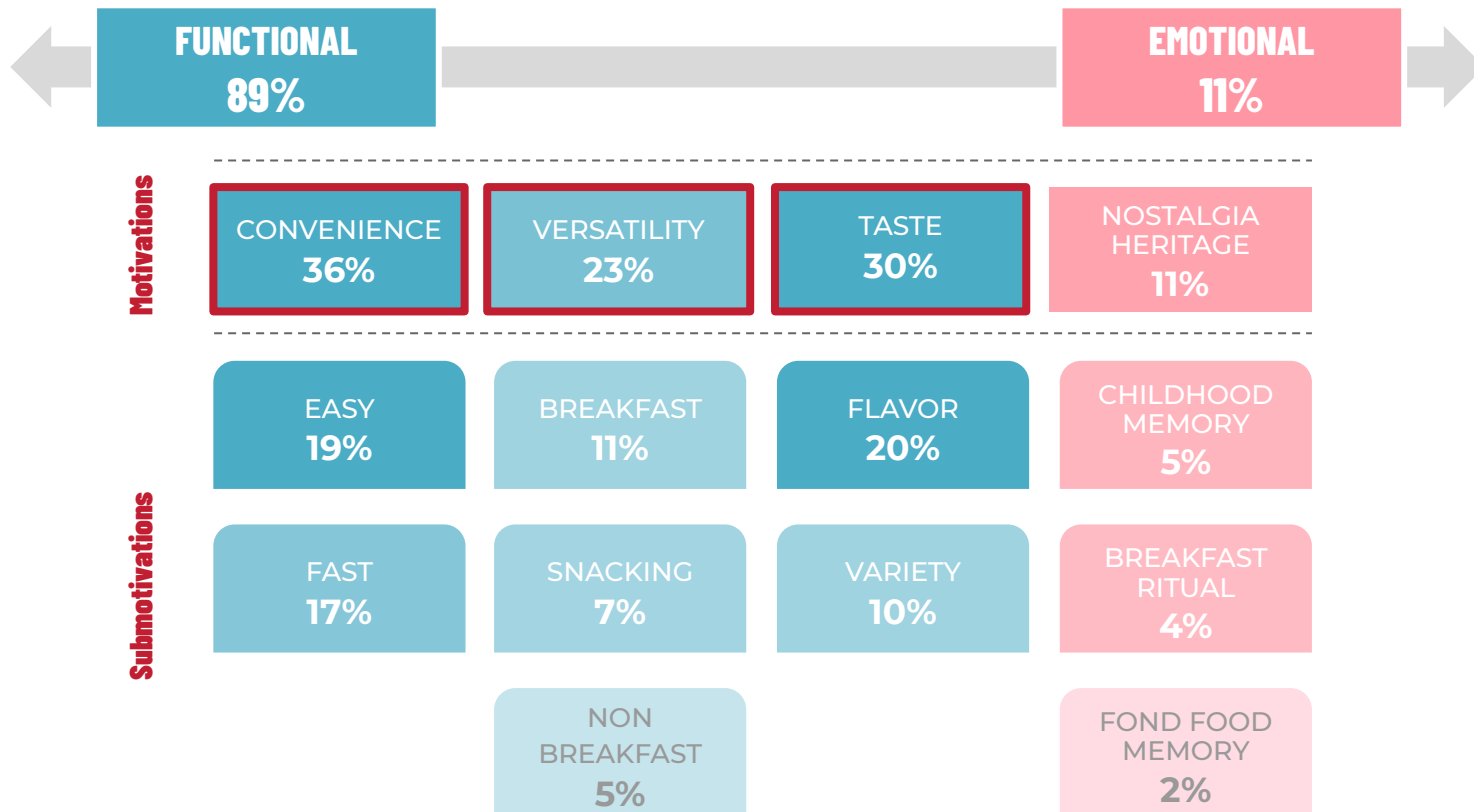


The Overall Population is mainly motivated to consume Frozen Breakfast by the **functional benefits** they associate with the category, especially **convenience** and **taste**.

Convenience is driven by **easy** (19%) and **fast** (17%), while taste is mostly related to **flavor** (20%).

**Frozen breakfast offer a great tasty experience delivered in a convenient format.**

# MOTIVATION DIAGRAM: Overall Population



# MOTIVATION SUMMARY SLIDE: Overall Segments

	OVERALL N=399K	BLACK AMERICANS N=36.4K	HISPANICS N=21.2K	ASIAN AMERICANS N=13.2K	LGBTQ N=46.5K	P. W/DISABILITIES N=3.1K
MOTIVATION #1	<b>CONVENIENCE 36%</b> Easy 19% Fast 17%	<b>CONVENIENCE 36%</b> Easy 21% Fast 15%	<b>CONVENIENCE 34%</b> Fast 18% Easy 16%	<b>TASTE 32%</b> Flavor 21% Variety 11%	<b>CONVENIENCE 39%</b> Easy 20% Fast 19%	<b>CONVENIENCE 41%</b> Easy 24% Fast 17%
MOTIVATION #2	<b>TASTE 30%</b> Flavor 20% Variety 10%	<b>TASTE 34%</b> Flavor 24% Variety 10%	<b>TASTE 32%</b> Flavor 20% Variety 12%	<b>CONVENIENCE 31%</b> Fast 16% Easy 16%	<b>VERSATILITY 29%</b> Snacking 10% Non-breakfast 10% Breakfast 9%	<b>VERSATILITY 31%</b> Non-breakfast 13% Breakfast 11% Snacking 8%
MOTIVATION #3	<b>VERSATILITY 23%</b> Breakfast 11% Snacking 7% Non-breakfast 5%	<b>VERSATILITY 26%</b> Breakfast 9% Snacking 9% Non-breakfast 9%	<b>VERSATILITY 31%</b> Breakfast 14% Non-breakfast 13% Snacking 5%	<b>VERSATILITY 28%</b> Breakfast 15% Snacking 9% Non-breakfast 5%	<b>TASTE 27%</b> Flavor 18% Variety 9%	<b>TASTE 24%</b> Flavor 17% Variety 7%

# MOTIVATION SUMMARY SLIDE: Segments

## BLACK AMERICANS

They consume Frozen breakfast products because of the **convenience** of preparing them fast and easily and the **satisfying taste** (especially the flavor). They also appreciate eating them for **versatile occasions such as breakfast, snacking and non-breakfast**, equally.

## HISPANICS

They are also motivated by the **convenience, the satisfying taste** coming from not just flavors but diversity of products. They also appreciate eating them for **versatile occasions such as breakfast but also non breakfast meals** (2.6x more than the overall population).

## ASIAN AMERICANS

They are motivated nearly equally by the **taste** of frozen breakfast products and the **convenience** they provide. They also appreciate eating them for **versatile occasions** such as **breakfast** (1.4x) and **snacking** (1.3x) more than the overall population.

## LGBTQ

They are motivated by the **convenience** and the **versatility** of the occasions they can consume these products, especially snacking (1.4x) and non-breakfast (2x) more than the overall population.

## P. W/DISABILITIES

They are motivated by the **convenience especially the fact that they are easy to prepare** (1.3x more than overall population) and the **versatility** of the occasions they can consume these products, especially **non-breakfast** (2.6x more than the overall population).



2

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

**Convenience:**

"They are so easy to pop into the toaster or toaster oven!!"

**Versatility:**

"Really good and a fast breakfast, or anytime you need something for on the go"

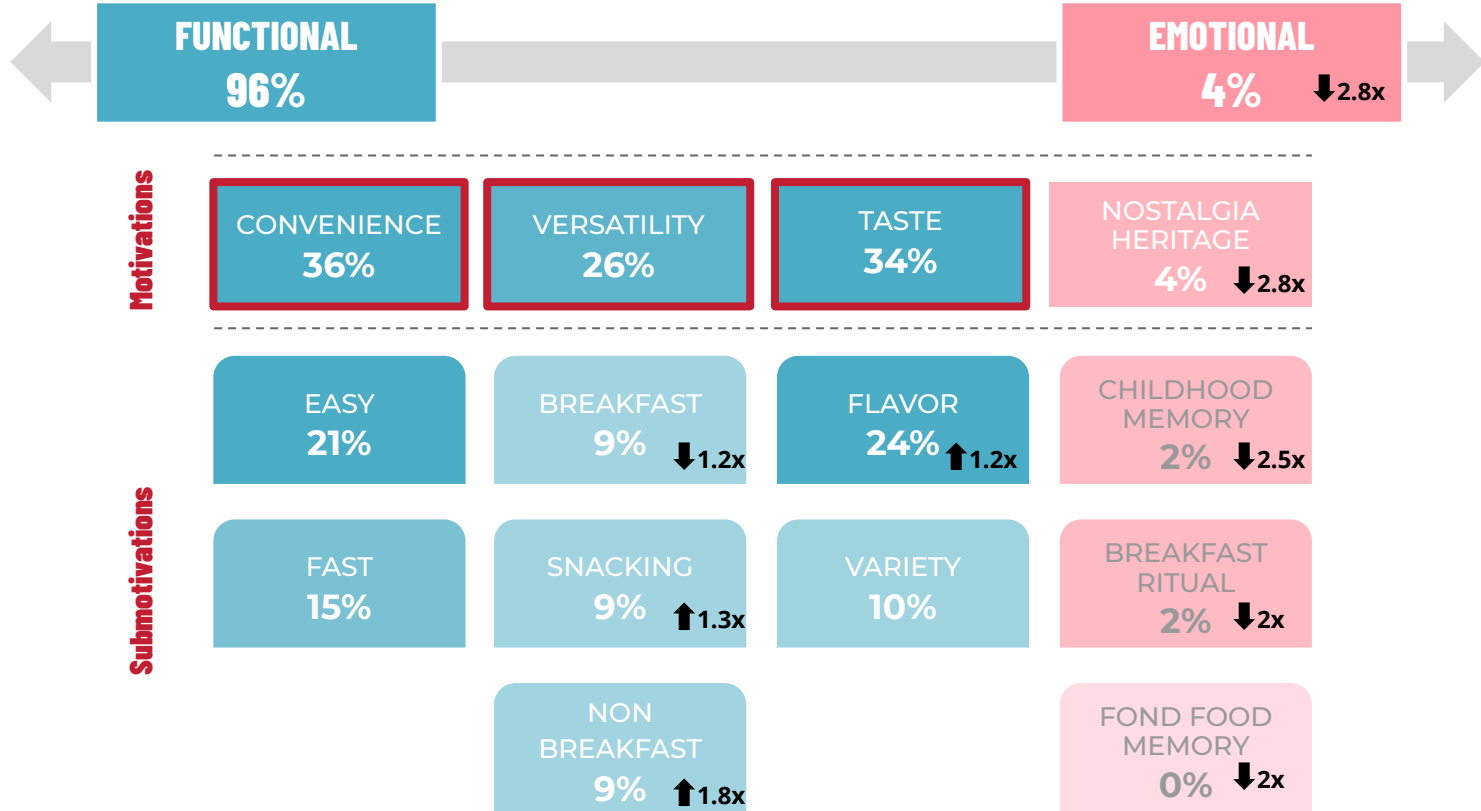
**Taste:**

"I get them for my kids and they love them! Eggo products are always the best! They don't disappoint!"

**Black Americans are driven by convenience (36%), taste (34%) and versatility(26%).**

They are 2.8x less motivated by emotional factors and more by snacking (1.3x), non-Breakfast (1.8x) and flavors (1.2x).

# MOTIVATION DIAGRAM: Black Americans







2

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

**Convenience:**

"I love the ease, convenience and how quickly I can get them morning snacks"

**Versatility:**

"fast staple whenever someone is hungry"

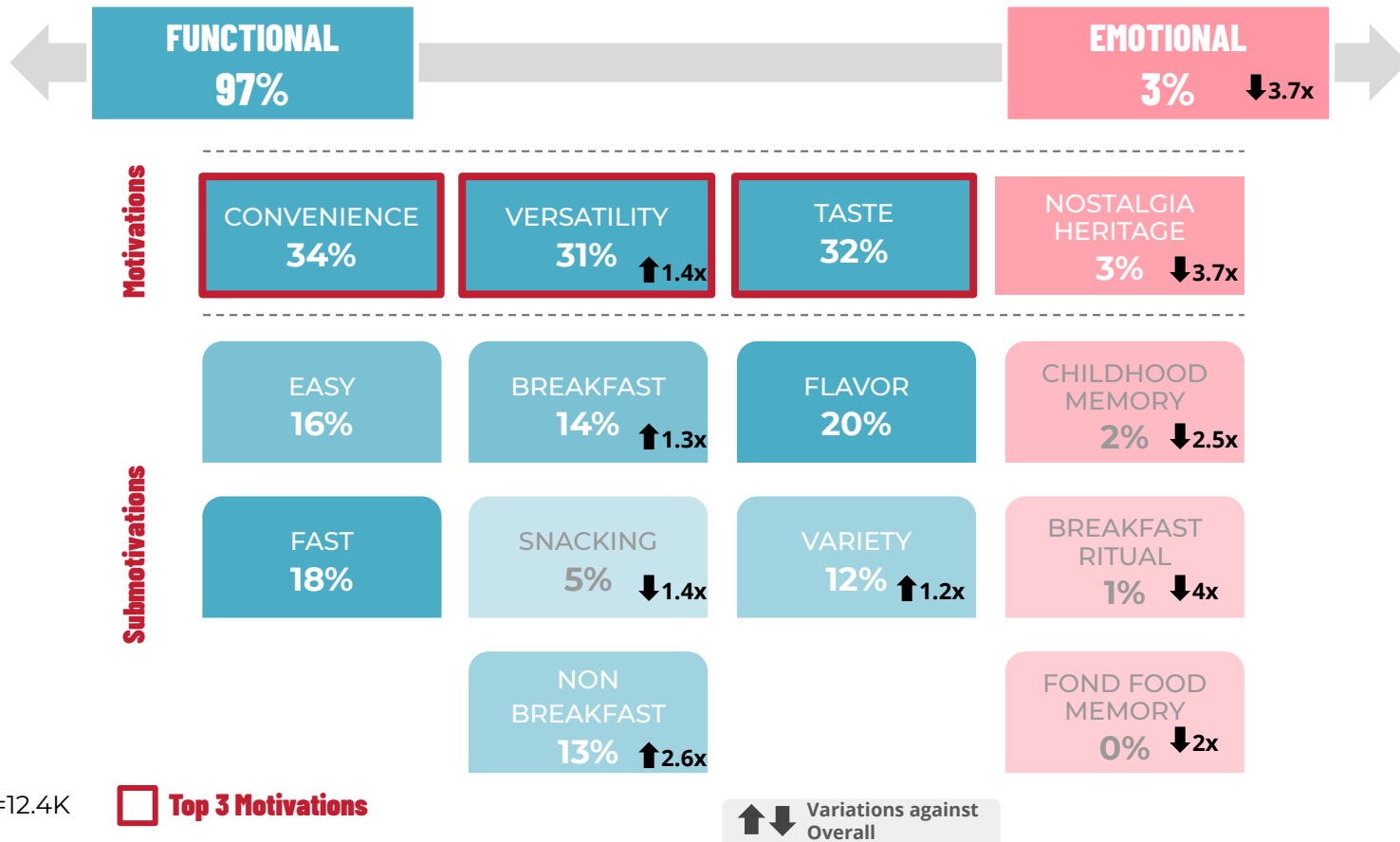
**Taste:**

"My kids love these as well even as picky eaters."

**Hispanics are driven by Convenience (34%), taste (32%) and versatility(31%).**

They are 3.7x less motivated by emotional factors. They are more motivated by Non-breakfast occasions (2.6x), Breakfast occasions (1.3x) and less about snacking occasions (1.4x) and more by Variety (1.2x).

# MOTIVATION DIAGRAM: Hispanics







2

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

**Convenience:**

"These are great for a quick and easy breakfast."

**Versatility:**

"Definitely one of my top go-to food items at any time of the day or night."

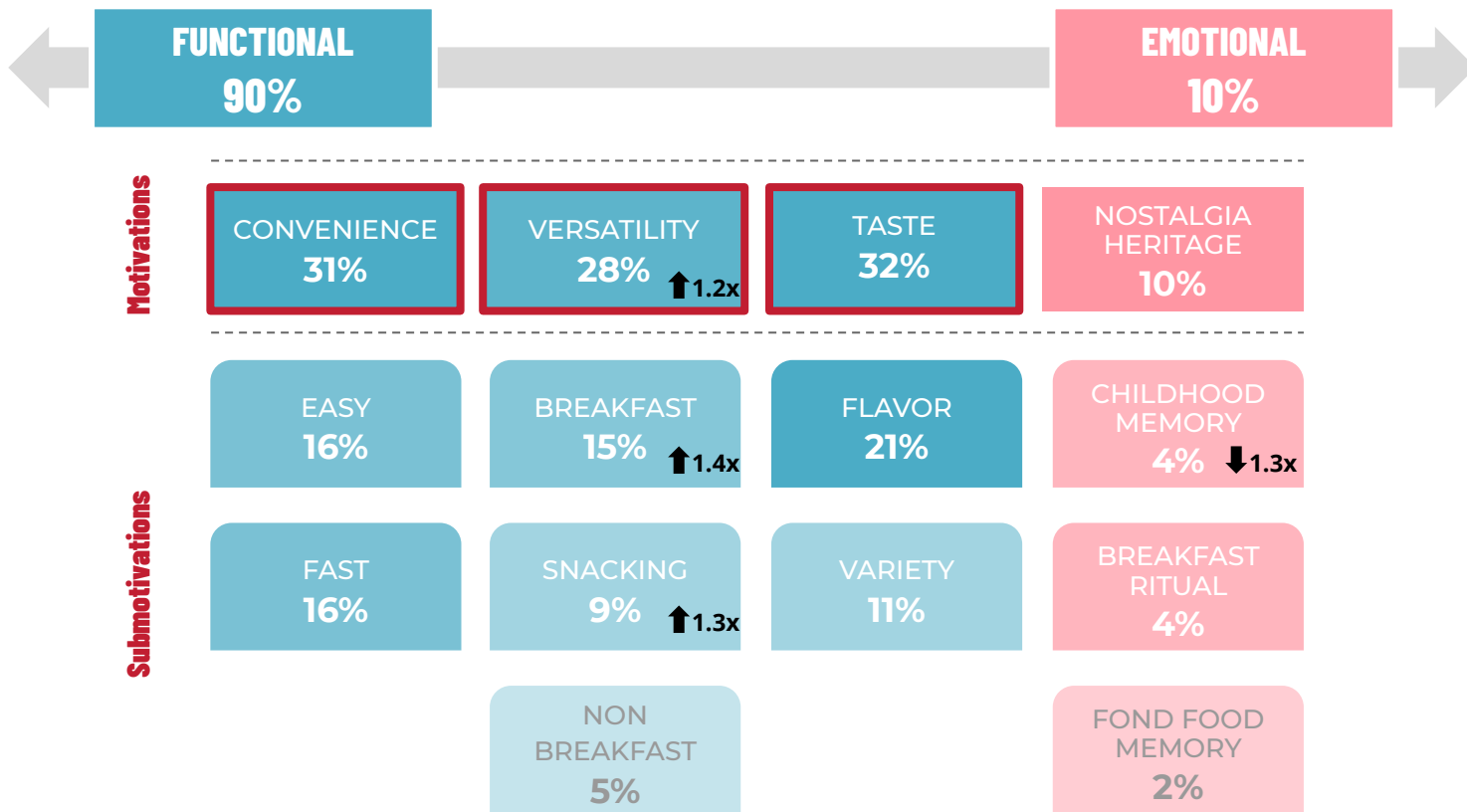
**Taste:**

"Easy bite size pieces of fluffy and savory goodness."

**Asian Americans are driven by taste (32%), convenience (31%) and versatility(28%).**

They are 1.3x less motivated by Childhood Memories. They are more motivated by Breakfast occasion (1.4x) and by snacking occasion (1.3x).

# MOTIVATION DIAGRAM: Asian Americans



convenience-

versatility-

2

taste-

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

**Convenience:**

"I love how quickly I can get my morning snacks when I first wake up and am super hungry."

**Versatility:**

"I love how it's easy to customize preferences as well."

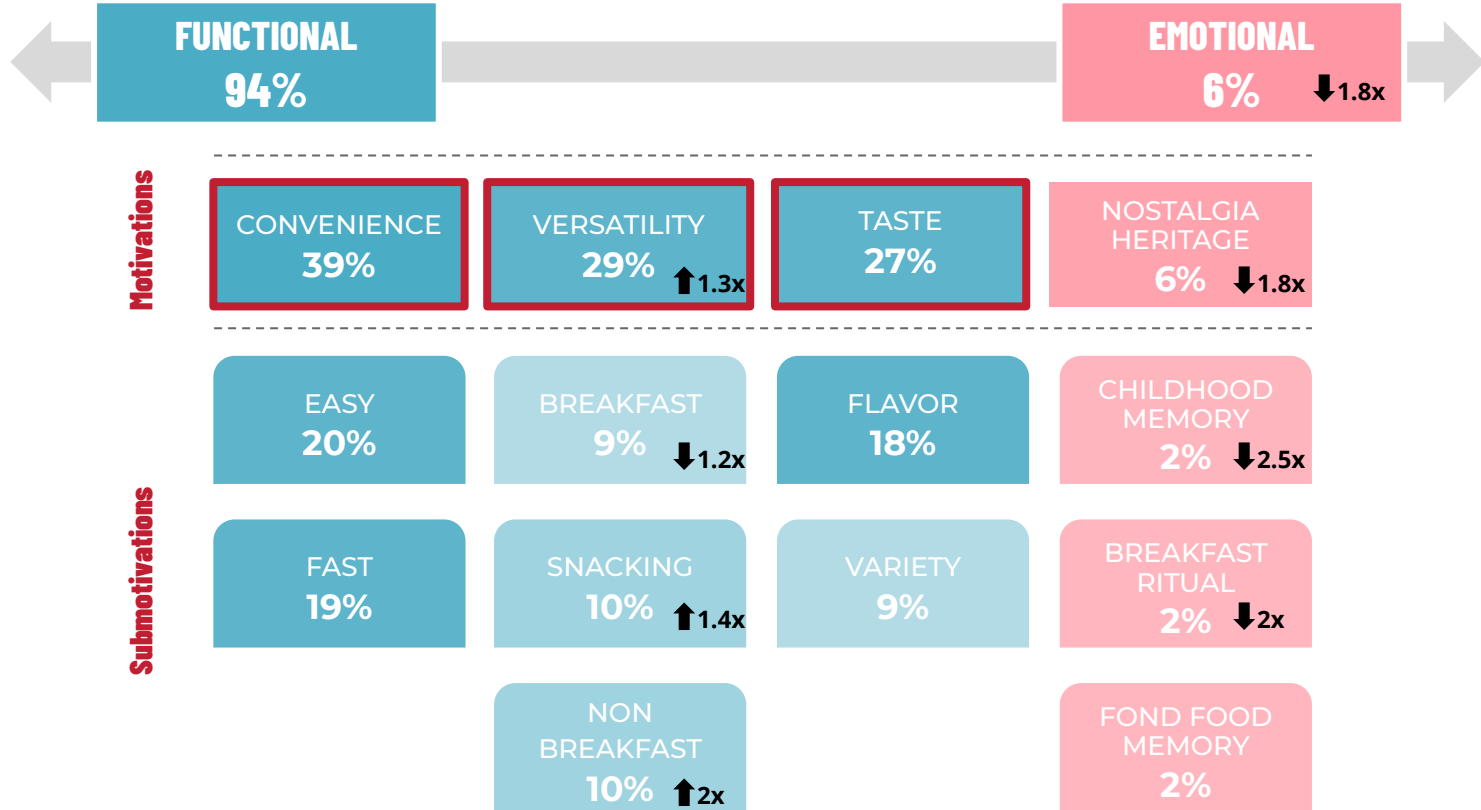
**Taste:**

"I have loved these since I was a little kid."

**LGBTQ are driven by Convenience (39%), versatility (29%) and taste (27%).**

They are 1.8x less motivated by emotional factors and more by non-breakfast (2x) and snacking occasions (1.4x).

# MOTIVATION DIAGRAM: LGBTQ







2

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

**Convenience:**

"super practical and quick prepared in minutes"

**Versatility:**

"These are a breakfast staple in our busy house. . They also make a decent snack or quick lunch."

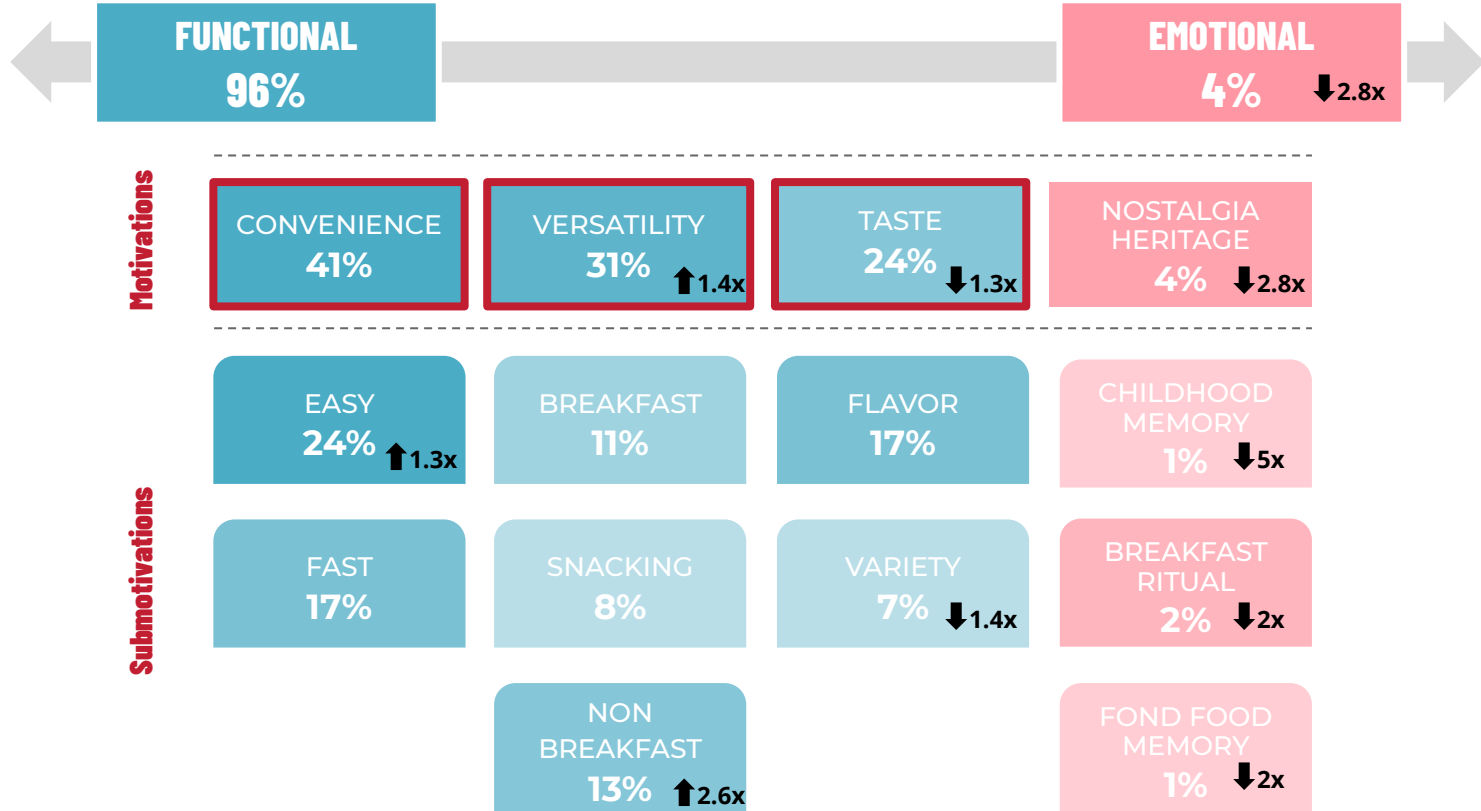
**Taste:**

"MAN OH MAN THOSE ARE GOOD!"

**People With Disabilities are driven by Convenience (41%), versatility (31%) and taste (24%).**

They are 2.8x less motivated by emotional factors and more by non-breakfast occasions (2.6x) and the ease to prepare (1.3x).

# MOTIVATION DIAGRAM: People Living With Disabilities





3

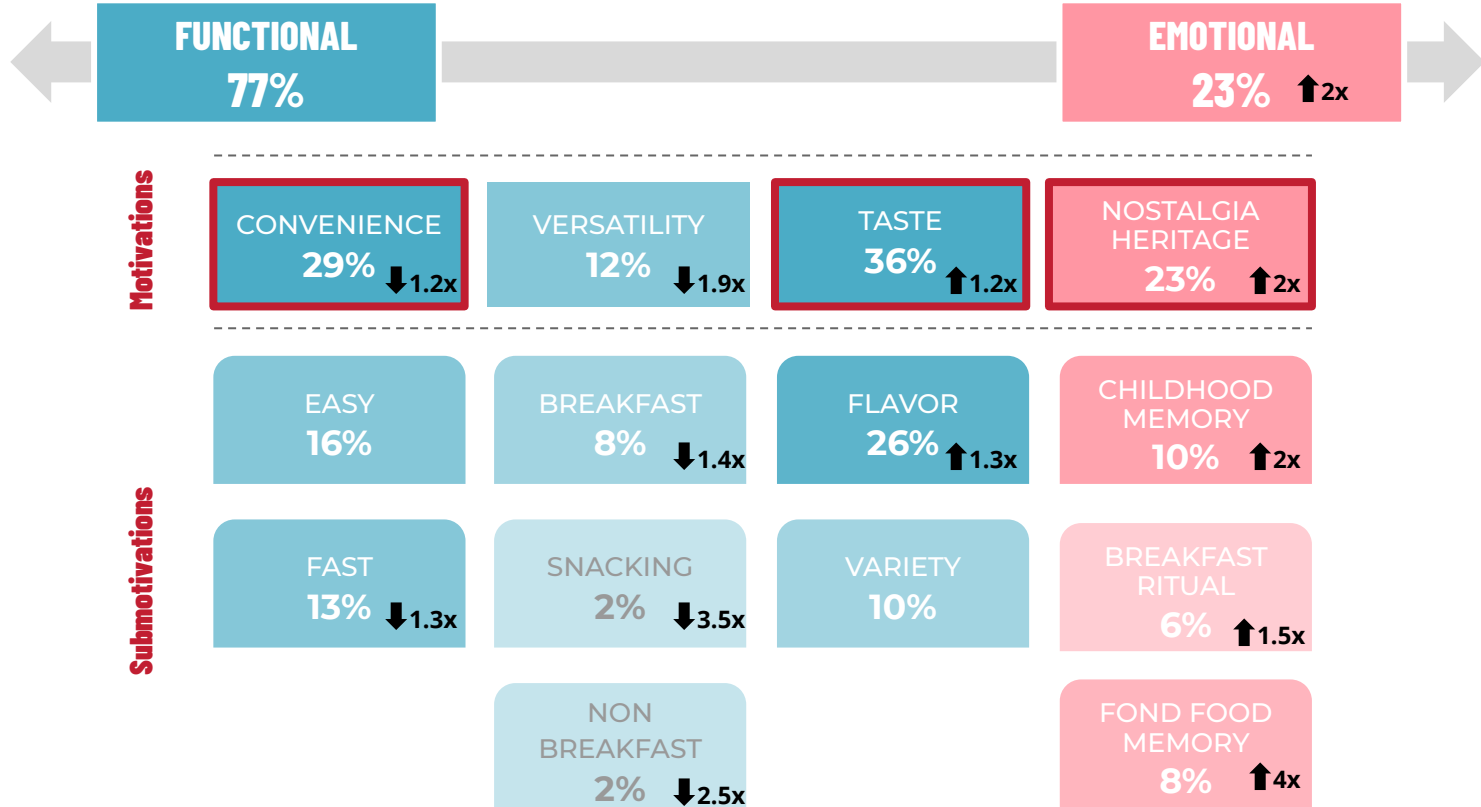
How does **aging** impact consumer behavior for **overall population**?

**Boomers are driven by taste (36%), convenience (29%) and nostalgia heritage (23%).**

Aging impacts consumer behavior of frozen breakfast. Although their consumption is mainly focus on **functional** benefits, they are (2x) **more emotional** than the overall population.

Their functional motivation is driven by **taste** 1.2x more. They are driven emotionally by the **nostalgia and heritage**, especially because it evokes their **childhood memories** 2x more than the overall population.

# MOTIVATION DIAGRAM: Overall Boomers





# MOTIVATION SUMMARY SLIDE: Boomers Segments

	OVERALL N=29.2K	BLACK AMERICANS N=2.3K	HISPANICS N=1K	ASIAN AMERICANS N=996	LGBTQ N=3.6K	P. W/DISABILITIES N=183
MOTIVATION #1	<b>TASTE 36%</b>  Flavor 26% Variety 10%	<b>CONVENIENCE 35%</b>  Easy 18% Fast 17%	<b>CONVENIENCE 34%</b>  Fast 20% Easy 14%	<b>CONVENIENCE 35%</b>  Easy 19% Fast 16%	<b>TASTE 31%</b>  Flavor 17% Variety 14%	<b>CONVENIENCE 34%</b>  Easy 22% Fast 12%
MOTIVATION #2	<b>CONVENIENCE 29%</b>  Easy 16% Fast 13%	<b>TASTE 31%</b>  Flavor 24% Variety 7%	<b>VERSATILITY 30%</b>  Breakfast 16% Non-breakfast 11% Snacking 2%	<b>TASTE 30%</b>  Flavor 20% Variety 10%	<b>CONVENIENCE 29%</b>  Easy 16% Fast 13%	<b>VERSATILITY 33%</b>  Breakfast 20% Non-breakfast 9% Snacking 4%
MOTIVATION #3	<b>NOSTALGIA HERITAGE 23%</b>  Childhood memory 10% Fond food memory 8% Breakfast ritual 6%	<b>VERSATILITY 22%</b>  Breakfast 13% Non-breakfast 6% Snacking 3%	<b>TASTE 28%</b>  Flavor 18% Variety 10%	<b>VERSATILITY 30%</b>  Breakfast 18% Non-breakfast 7% Snacking 5%	<b>NOSTALGIA HERITAGE 25%</b>  Fond food memory 13% Childhood memory 8% Breakfast ritual 4%	<b>TASTE 30%</b>  Flavor 23% Variety 7%

# MOTIVATION SUMMARY SLIDE: Boomer Segments

## BLACK AMERICAN BOOMERS

They consume Frozen breakfast products because of the **convenience** of preparing them fast and easily and the **satisfying taste** (especially the flavor). They also appreciate eating them for **versatile occasions especially breakfast**, 1.4x more than the Black American population and less snacking.

As they age, they are also more driven by **emotional factors** (12%, 3x more than overall Black Americans), especially the association with childhood memories.

## HISPANIC BOOMERS

They are also motivated by the **convenience, the versatility** (yet, less for snacking but more for breakfast or other meals than overall Hispanics), **and the satisfying taste** coming from not just flavors but diversity of products.

As they age, they are also more driven by **emotional factors** (8%, 2.7x more than overall Hispanic), especially due to the association with their childhood memories.

## ASIAN AMERICAN BOOMERS

They are motivated by the **convenience**, and the **taste and versatility** of frozen breakfast products (especially the non-breakfast and breakfast occasions and less of the snacking occasions).

Interestingly, they are **2x less motivated by emotional factors** than overall Asian Americans.

## LGBTQ BOOMERS

They are still motivated by **taste**, but less by the **convenience** and the **versatility** than overall LGBTQ.

As they age, they are also 4.2x more motivated by **emotional factors**, especially as the product remind them of fond food memories (6.5x more than overall LGBTQ).

## P. W/DISABILITIES BOOMERS

They are motivated by the **convenience especially the fact that they are easy to prepare**, the **versatility** of the occasions they can consume these products, especially **breakfast** and less of other occasions than the overall community. **Taste** is still their #3 motivation driven by flavor more than variety.

They are more motivated by **emotional factors** as well but still they represent a low percentage (5% of their overall motivations)



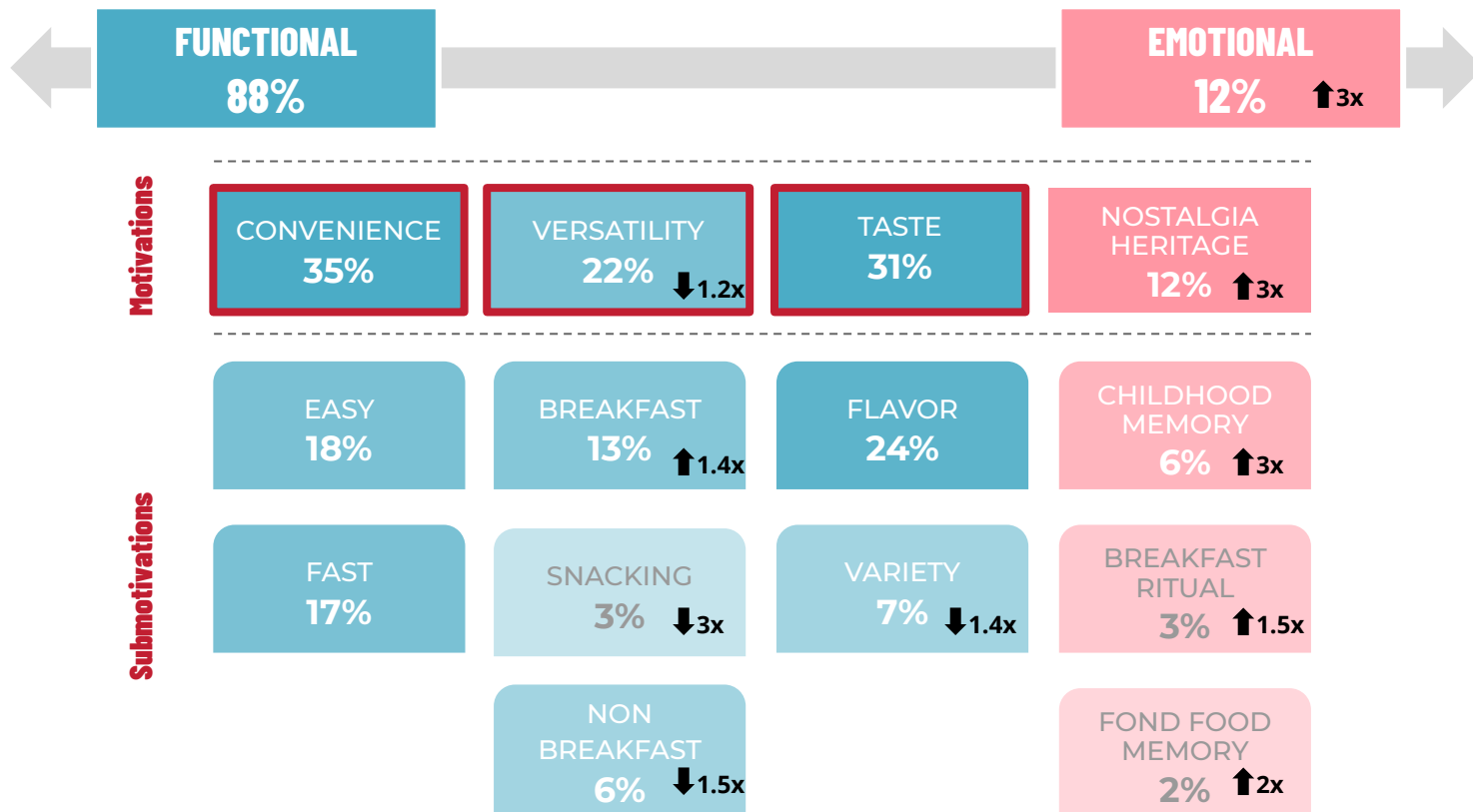
# 3

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

**Black American Boomers are driven by convenience (35%), taste (31%) and versatility (22%).**

Aging impacts their frozen breakfast consumer behavior. They are 3x more motivated by emotional factors (12%) as their fourth motivation. They are also .4x more motivated by breakfast consumption. In contrast, they are less motivated by snacking (3x), non-breakfast (1.5x) and variety (1.4x).

# MOTIVATION DIAGRAM: Black American Boomers





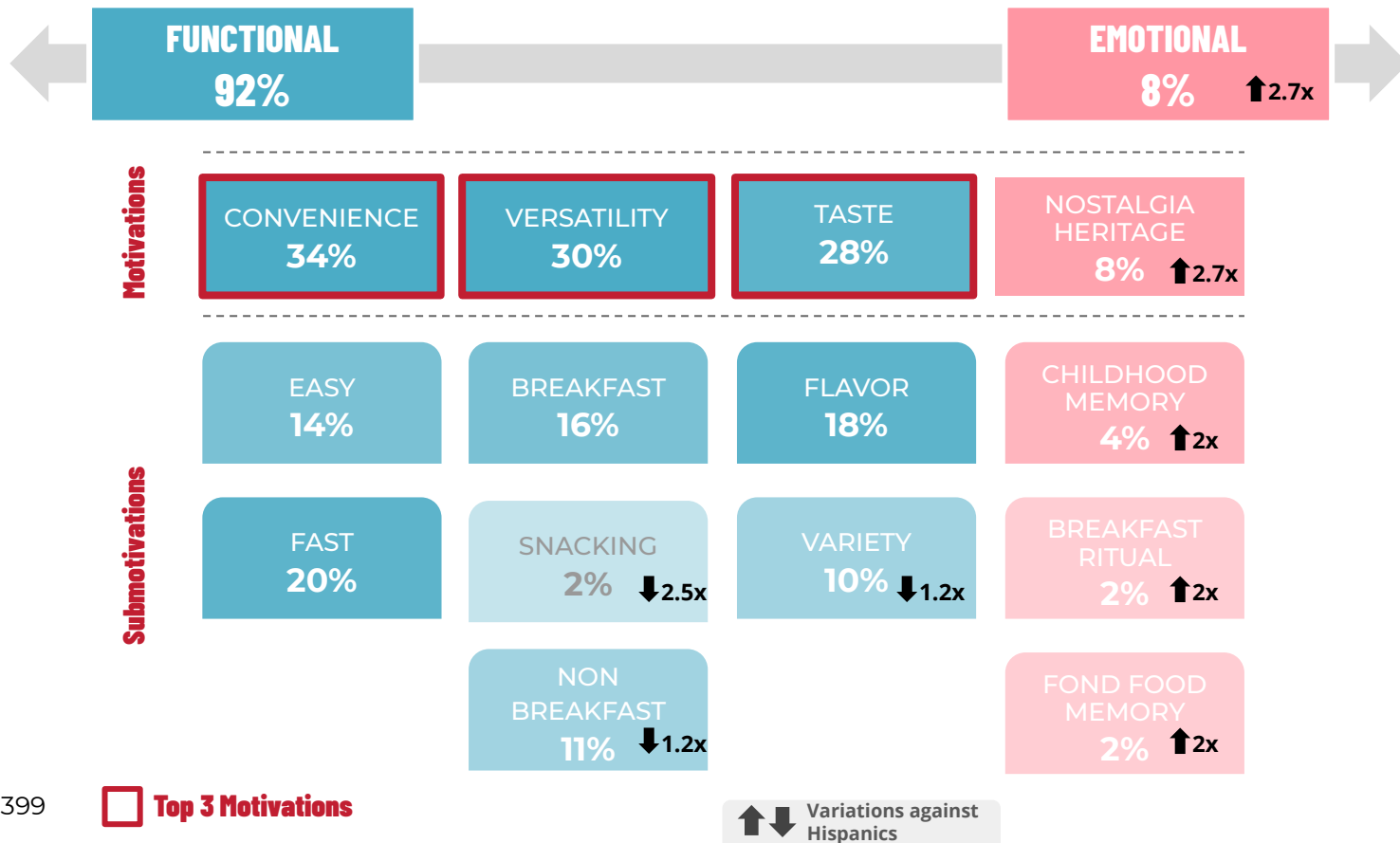
3

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

**Hispanic Boomers are driven by convenience (34%), versatility (30%) and taste (28%).**

Aging impacts their frozen breakfast consumer behavior. They are 2.7x more motivated by emotional factors, and are less motivated by snacking (2.5x), and variety (1.2x) than overall Hispanics.

# MOTIVATION DIAGRAM: Hispanic Boomers





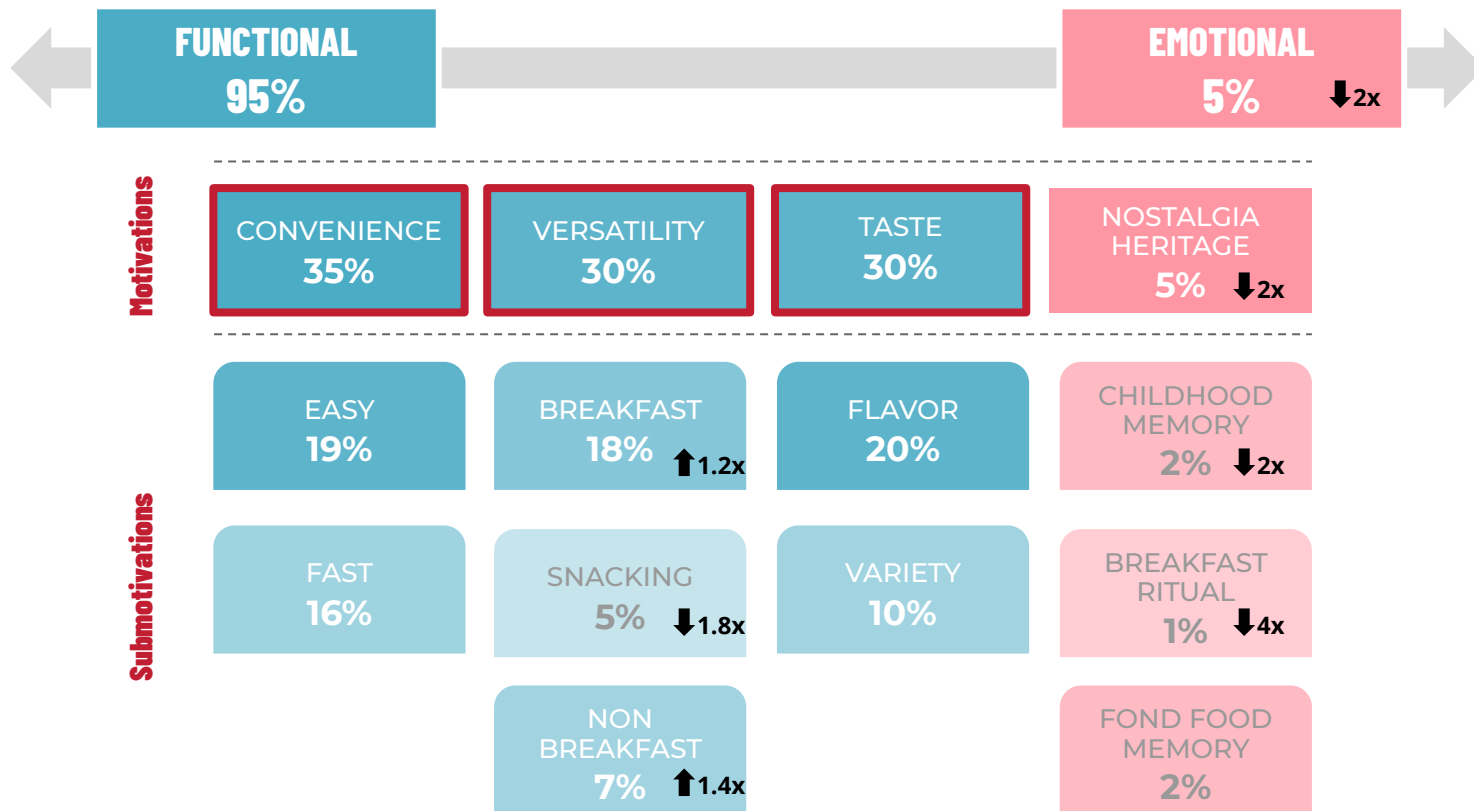
# 3

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

**Asian American Boomers are driven by convenience (35%), versatility (30%) and taste (30%).**

Aging impacts their frozen breakfast consumer behavior. They are 2x less motivated by emotional factors, and are more motivated by non-breakfast (1.4x), and breakfast (1.2x) occasions.

# MOTIVATION DIAGRAM: Asian American Boomers





A close-up, slightly blurred photograph of a stack of three pancakes on a teal-colored plate. The pancakes are topped with a dusting of white powdered sugar. The plate is resting on a light-colored wooden surface. The background is out of focus, showing more of the wooden surface and a hint of a white object.

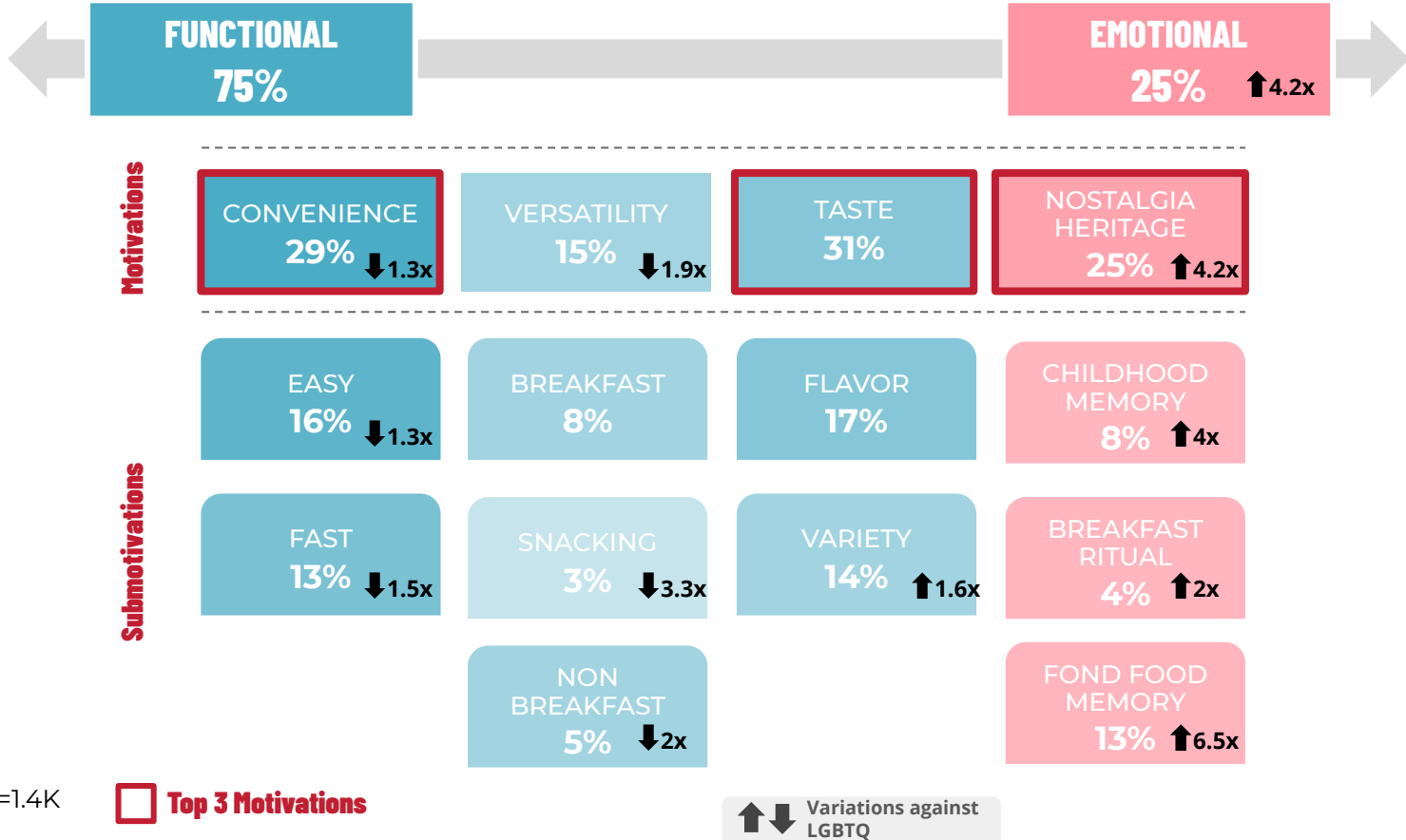
# 3

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

**LGBTQ Boomers are driven by taste(31%), convenience (29%) and Nostalgia & Heritage (25%).**

Aging impacts their frozen breakfast consumer behavior. They are 4.2x more motivated by emotional factors, especially fond food memories (6.5x). In contrast, they are less motivated by versatility (1.9x), and convenience (1.3x).

# MOTIVATION DIAGRAM: LGBTQ Boomers



A close-up photograph of a burrito on a white plate. The burrito is cut in half, revealing a filling of green salsa, beans, and vegetables. A fork is visible in the background, and a glass of orange juice is partially visible on the left. The image is used as a background for the text overlay.

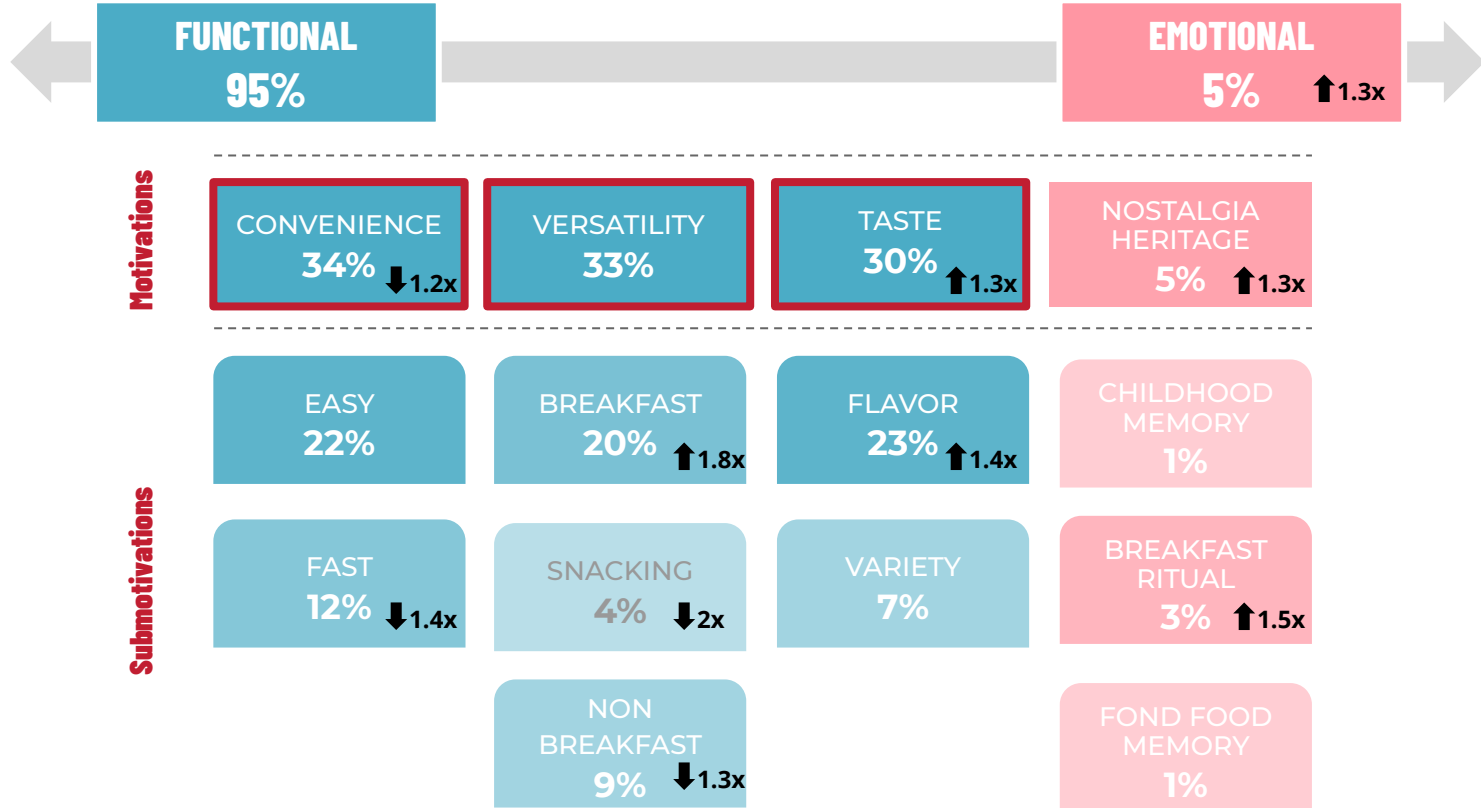
# 3

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

**Boomers Living With Disabilities** are driven by convenience (34%), versatility (33%) and taste (30%).

Aging impacts their frozen breakfast consumer behavior. They are more motivated by breakfast occasions (1.8x), flavors (1.4x) and emotional factors (1.3x). In contrast, they are less motivated by snacking (2x), fast (1.4x), and non-breakfast occasions (1.3x).

# MOTIVATION DIAGRAM: Boomers Living With Disabilities



# Appendix



# Definition of the Frozen Breakfast Category

Category	Parent
Frozen	KELLOGG CO, KODIAK CAKES LLC, DE WAFFLE BAKERS, TYSON FOODS INC

# Definition of the Frozen Breakfast Category

Product Category	Parent	Brand
Frozen	ALDI INC	ALDI SPECIALLY SELECTED WAFFLES-FROZEN
Frozen	GENERAL MILLS INC	PILLSBURY WAFFLE STICKS WAFFLES-FROZEN
Frozen	JULIANS RECIPE LLC	JULIANS RECIPE WAFFLES-FROZEN
Frozen	KELLOGG CO	KELLOGG'S EGGO WAFFLES-FROZEN
Frozen	KELLOGG CO	KELLOGG'S EGGO WAFFLES-FROZEN THICK & FLUFFY
Frozen	KODIAK CAKES LLC	KODIAK CAKES POWER WAFFLES WAFFLES-FROZEN
Frozen	KROGER CO	KROGER WAFFLES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN BISCUIT ROLL-UPS ENTREES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN BISCUIT ROLL-UPS ENTREES-FROZEN SAUSAGE EGG & CHEESE
Frozen	TYSON FOODS INC	JIMMY DEAN BREAKFAST BOWLS ENTREES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN BREAKFAST ENTREES ENTREES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN DELIGHTS ENTREES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN D-LIGHTS ENTREES-FROZEN
Frozen	TYSON FOODS INC	JIMMY DEAN ENTREES-FROZEN SANDWICHES
Frozen	TYSON FOODS INC	JIMMY DEAN PANCAKES & SAUSAGE ENTREES-FROZEN
Frozen	TYSON FOODS INC	VANS GLUTEN FREE WAFFLES-FROZEN



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