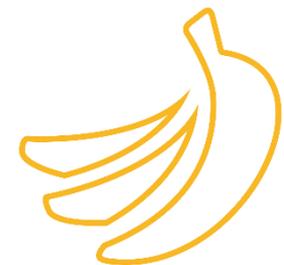
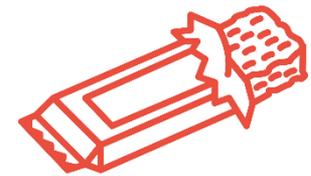


MEET THE BREAKFAST CONSUMER SEGMENTS



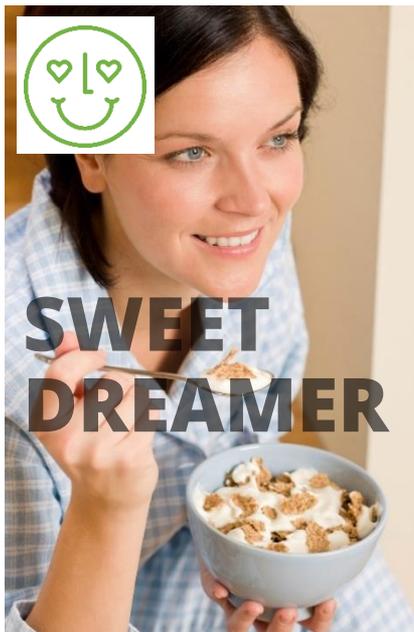
BREAKFAST CONSUMER SEGMENTS

Breakfast food trends are moving in various directions. There are more options in breakfast foods with more variety in the grocery stores today than any other point in modern history. W5 set out to understand not only what makes modern breakfast consumers different, but also the needs and attitudes they share. Let's meet our breakfast consumer segments...





SWEET DREAMER



SARAH

36% of total consumers

Enjoys starting the day off with sweet filling foods

Morning is a time for indulgences

Loyal to their favorite brands of sweet foods



FRESH FOOD BALANCER



FELICIA

19% of total consumers

Fresh fruit or vegetables are a must in every meal

A healthy diet and energy levels are goals

Takes extra time to ensure fresh food is included in meals



ON-THE-GO JOE



JEFF

25% of total consumers

Demanding schedules

Often skips breakfast to save time in the morning

Portability and convenience are high priorities



POWER PRODUCE PEOPLE



PENNY

20% of total consumers

Fresh fruits and vegetables are the spotlight of meals

Have little to no interest in meat or grains in their breakfast

Strict dietary restrictions



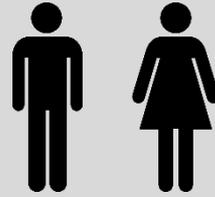
SARAH

Sweet Dreamer

This segment loves starting the day off with sweet filling foods. They feel starting your day off with a sweet treat can make for a more pleasant day.



GENDER



36%
Total 31%

64%
Total 69%

AGE

65%
18-34 years old
Total 35%

35%
35-64 years old
Total 65%

INCOME

22%
Less than \$25K
Total 17%

18%
\$25K-\$49K
Total 31%

30%
\$50K-\$74K
Total 24%

30%
\$75K or more
Total 26%

Breakfast Favorites

60%
Purchase cereals (hot and cold)
several times per month
Total 45%

54%
Regularly purchase flavored
yogurts
Total 37%



Breakfast is pleasurable moment in the day



Sarah loves sweet flavors and new tastes. She is always on the lookout for her favorite breakfast foods and seasonal favorites. Breakfast is something to get excited about, a sweet start to the day ahead. Sarah enjoys providing small indulgences for herself and her family.

"The promise of a something sweet can get me out of bed in the morning."



How I Shop



Sarah will often go to the grocery store with an idea and a general list of items. When buying breakfast food and products, Sarah buys her family's favorites and will pepper in the occasional new or seasonal item.



Sweet Dreamers are free-spending and family-centric...



I spend more than a third of my grocery trip focused on breakfast foods

Total 44%



I often buy granola or cereal bars for on-the-go breakfasts

Total 47%



FELICIA

Fresh Food Balancer

This segment takes the extra steps to ensure their breakfast is balanced. A meal can feature a mixture of produce, grains, and proteins, however you'll rarely find boxed or "instant" foods in their pantry.



GENDER



33%
Total 31%

67%
Total 69%

AGE

29%
18-34 years old
Total 35%

71%
35-64 years old
Total 65%



INCOME

21%
Less than \$25K
Total 17%

32%
\$25K-\$49K
Total 31%

22%
\$50K-\$74K
Total 24%

22%
\$75K or more
Total 26%

Breakfast Favorites

66%
Whole grains are important to
a complete breakfast

Total 34%

65%
Breakfast often features fresh
produce

Total 57%





A well- rounded and nutritious breakfast is

*“Breakfast is **not a one-food-meal** for me. I need some **flavor and texture variety** in my mornings.*

Felicia believes that food for her family should be healthy, diverse, and provide the energy to have a productive day.

Felicia considers fresh foods to be nutritious and healthier than packaged goods. She is willing to pay more for fresh food, as to avoid an excess of preservatives and fillers.



How I Shop



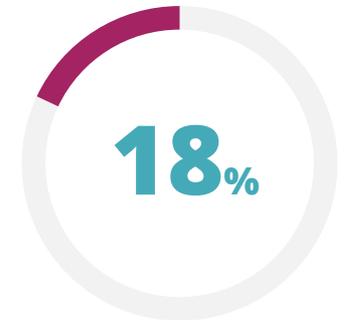
“I go to the grocery store so often, the cashier knows me by name. Freshness is worth the effort.”

Fresh Food Balancers make several trips to the grocery store every week to ensure freshness of their foods. They do not typically have many large stock-up shopping experiences, instead they pick up fresh ingredients needed for the next day or two.



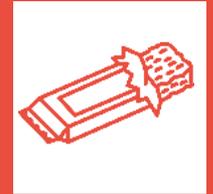
Make multiple trips to the grocery store every week

Total 40%



Often purchase frozen breakfast foods

Total 36%



JEFF

On-the-Go Joe

For On-the-Go Joe, breakfast can be a speed up in their busy, fast-paced mornings. Getting themselves and their family out the door is their number one priority. A nutritious and filling breakfast is often replaced with a portable bite or a quick beverage.



GENDER



47%
Total 31%

53%
Total 69%

AGE

64%
18-34 years old
Total 35%

36%
35-64 years old
Total 65%



INCOME

12%

Less than \$25K
Total 17%

37%

\$25K-\$49K
Total 31%

32%

\$50K-\$74K
Total 24%

19%

\$75K or more
Total 26%

Breakfast Favorites

67%

Consume one or more granola or cereal bars a week

Total 26%

43%

Consume only coffee or another beverage most mornings

Total 20%



**“I’m so busy
all day and
the way
meals are
spaced out,
snacks are a
necessity.”**



Rick sees himself as a simple guy with a simple mindset toward food. He’s no foodie and doesn’t look for new and interesting products or follow the latest trends. He just wants something to fill him up and get him going.

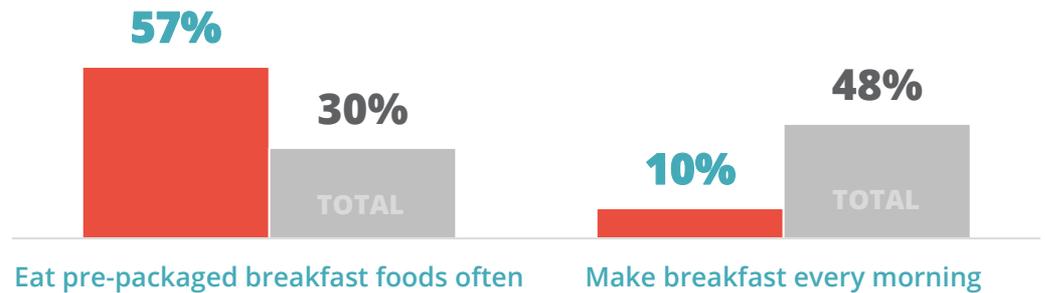
It helps though if it’s tasty and something he enjoys. When he finds something he likes, he tends to stick with it and likes knowing just what he’s going to be getting.

On-the-Go Joes like Jeff choose pre-packaged breakfast foods for taste and convenience, seeing them as a reliable way to fill up when hungry.

They often have pre-packaged goods on hand to substitute full meals. This practice fit nicely into their busy lives.

Breakfast Dining Habits

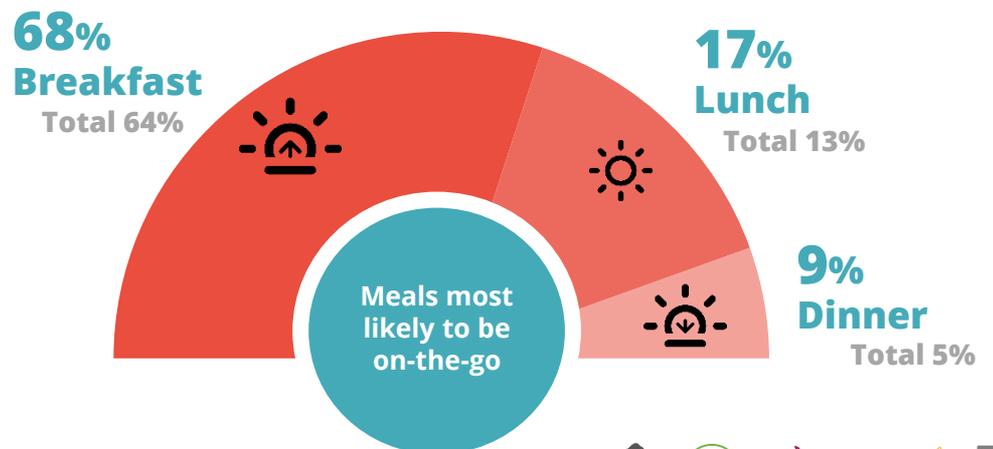
Prepackage vs. Fresh



83% Skips breakfast all together at least once a week

Total 30%

Breakfast is the primary meal occasion cereal or granola bars





PENNY

Power Produce People

Power Produce People are attentive to the food they buy and eat. Their goal is to make healthy life choices for themselves and their families. They feel plant-based foods offer the richest source of vitamins and antioxidants while delivering the bold flavors they want for breakfast.



GENDER



18%
Total 31%

82%
Total 69%

AGE

54%
18-34 years old
Total 35%

46%
35-64 years old
Total 65%



INCOME

16%
Less than \$25K
Total 17%

23%
\$25K-\$49K
Total 31%

27%
\$50K-\$74K
Total 24%

30%
\$75K or more
Total 26%

Breakfast Favorites

63%
Consumes juices or smoothies
several times a week

Total 19%

80%
Breakfast often features fresh
fruits or vegetables

Total 57%





Day in the Life of Power Produce People

Penny's strict dietary restrictions keep her morning breakfast prep simple, but flavorful. Her blender or juicer is put to use to whip up a quick fruit beverage. Her produce bowl is fully stocked with grab-and-go foods like apples, pears, and bananas.

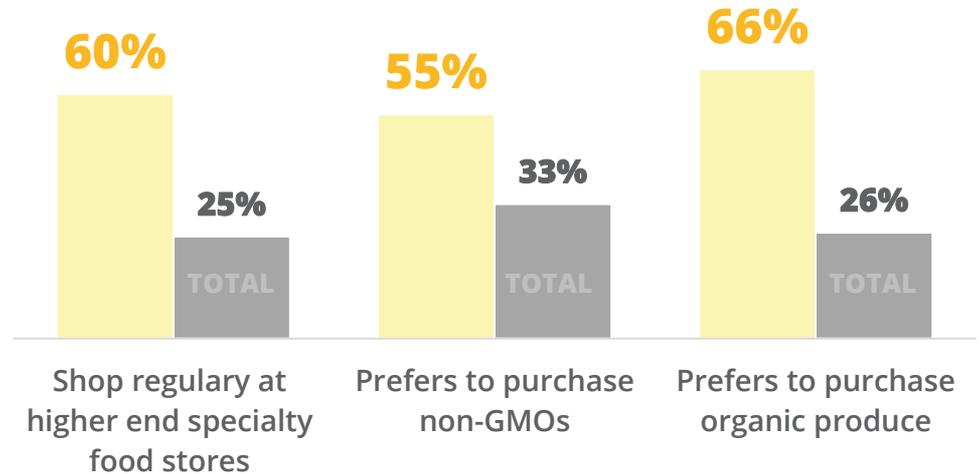
How I Shop

Penny is driven by her health goals when grocery shopping. She reads labels and prefers buying less processed foods.

Power Produce People like Penny are also highly organized shoppers and purchase many of the same items habitually. Variety comes from seasonal products and produce.



Power Produce People are more prone to consume organic or non-GMO foods



85%

Total 56%

Are willing to spend more to for healthier foods

27%

Total 42%

Regularly purchase pre-packaged breakfast products

15%

Total 52%

Regularly purchase breakfast meats

Produced by

