



Analysis of Frito-Lay's "Taking Action"
Coronavirus Message among
Millennial Animated Personas
April 21, 2020

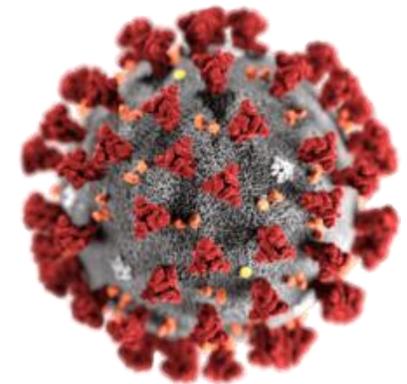
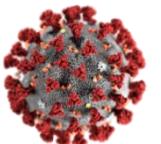


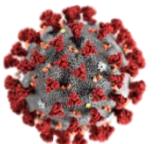
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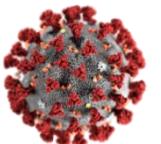
Introduction to Animated Personas

- Animated Personas are machine-learning agents representing consumer segments.
- They can be built from segmentation data and other primary survey data.
- They represent an opportunity to add life to traditional data that ages over time.
- They indicate their interest in messages, concepts and ideas.
- By looking deeper at interest, the importance of specific components of the message/idea are revealed and key insights are uncovered.



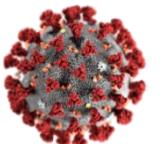
Introduction to Research

- The global pandemic has wrecked havoc with seemingly every aspect of our lives and the companies that promote their products through TV, print, and social media are certainly not immune.
- These companies are attempting to navigate through these difficult times by balancing their need to continue to promote their products while addressing their efforts to be good corporate citizens.
- **PersonaPanels** looked at this new company behavior by focusing on one example: a recent message from Frito-Lay, a leading maker of snack foods based in Plano, Texas.
- This message was looked at through the eyes of **PersonaPanels**' 6 Millennial Animated Personas and analyzed in terms of its impact on interest, importance, key insights and the value of those insights relative to the entirety of the message.
- Results showed that Millennials are not a monolithic unit that sees interest, importance and key insights in lockstep. This finding can help companies target their messages to audience segments more effectively.

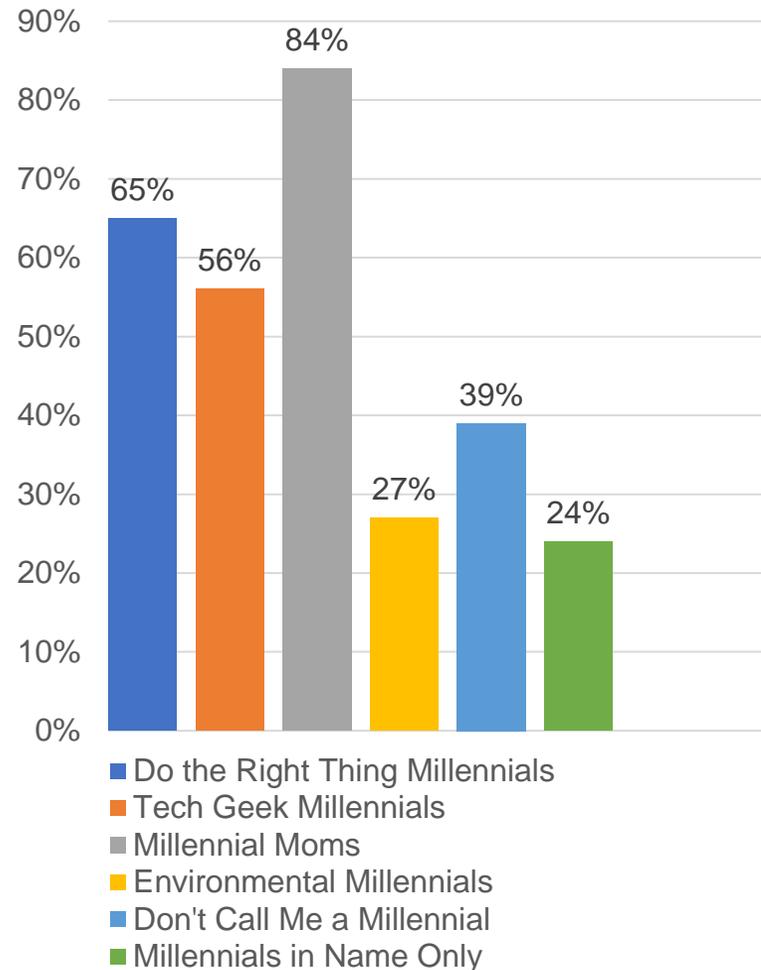


Approach to Analytics

- **PersonaPanels** is able to take the text of a message and dissect it in order to:
 - Uncover general interest in the entirety of the message for each Animated Persona that is evaluating it (slide 5)
 - Break the message down into specific sections to determine the importance of each section for each Animated Persona (slide 6)
 - Take the most important sections, look at the specific sentences in it, and determine the key insights (slide 7)
 - Demonstrate the value of each sentence in the most important sections by showing the drop in interest when it is excluded from an Animated Persona's evaluation (slide 8)

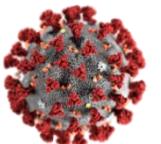


Detailed Findings: Overall Interest



Frito-Lay Message

Things are hard now. The world doesn't need brands to tell us how to think or feel. The world needs brands to take action. That's what we've been focused on at Frito Lay. Creating 3,000 new full-time jobs with benefits. Donating over \$15 million towards relief efforts across North America. Providing 20 million nutritious meals for at-risk students and families with Food for Good, No Kid Hungry, Baylor University and the USDA. And funding mobile health clinics across the U.S. to provide COVID-19 screenings for the public. We're not changing our logo. We're not asking America to donate for us. This is not about brands. It's about people. And this is just the start. Go to fritolay.com/action to see what we're doing to make an impact and let us know how we can continue to help.



Detailed Findings: Focus of Importance



Do the Right Thing Millennials



Tech Geek Millennials



Millennial Moms



Environmental Millennials



Don't Call Me a Millennial



Millennials in Name Only

Things are hard now. The world doesn't need brands to tell us how to think or feel. The world needs brands to take action. That's what we've been focused on at Frito-Lay.



Not Important



Creating 3,000 new full-time jobs with benefits. Donating over \$15 Million towards relief efforts across North America. Providing 20 Million nutritious meals for at-risk students and families with Food for Good, No Kid Hungry, Baylor University and the USDA. And funding mobile health clinics across the U.S. to provide COVID-19 screenings for the public.



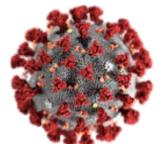
Important



We're not changing our logo. We're not asking America to donate for us. This is not about brands. It's about people. And this is just the start. Go to fritolay.com/action to see what we're doing to make an impact and let us know how we can continue to help.



Not Important



Detailed Findings: Key Insights



Do the Right Thing Millennials



Tech Geek Millennials



Millennial Moms



Environmental Millennials



Don't Call Me a Millennial



Millennials in Name Only

Creating 3,000 new full-time jobs with benefits.

No

No

No

No

No

No

Donating over \$15 Million towards relief efforts across North America.

No

No

No

No

No

No

Providing 20 Million nutritious meals for at-risk students and families with Food for Good, No Kid Hungry, Baylor University and the USDA.

No

Yes

Yes

Yes

Yes

Yes

And funding mobile health clinics across the U.S. to provide COVID-19 screenings for the public.

Yes

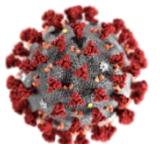
No

No

No

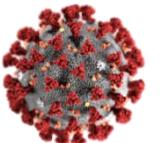
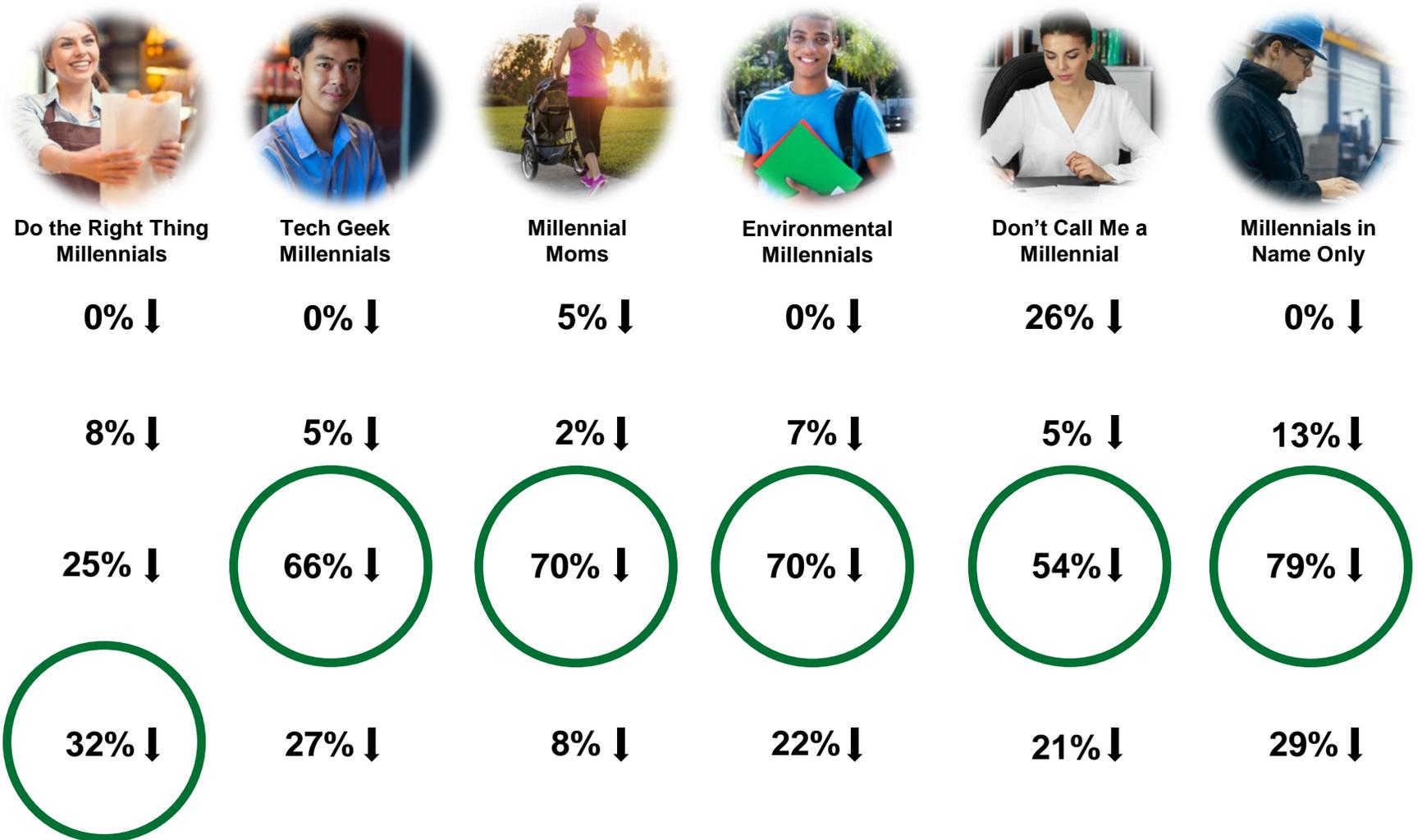
No

No



Detailed Findings: Value Index of Key Insights

Elimination of Each Key Insight Resulting in % Drop (↓) of Interest



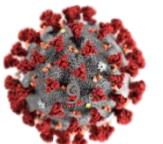
Appendix A: Overview of PersonaPanels

- **PersonaPanels**

- **PersonaPanels** is at the intersection of machine learning and market intelligence, turning research data into machine learning bots called Animated Personas. Once created, Animated Personas access the Internet, where each day they autonomously select material to read that aligns with their defined characteristics. Because Animated Personas are machine learning agents, the material they read influences their future reading choices and their reactions to messaging. This means that Personas mirror the interests of targeted respondent groups, both in their selection of Internet material to read and in their responses to messages put in front of them for evaluation.

- **Persona Messaging**

- Once Animated Personas have been created and are accessing the Internet, they are ready to respond to ideas and message tests. Because Animated Personas are machine learning agents, the material they access and find interesting becomes integrated into their personalities, influencing both their future reading choices and their responses to research ideas and messages. This ensures that research results are always reflective of current market trends and changing population segment preferences.



Appendix B: Millennial Animated Persona Descriptions

Tech Geek Millennials

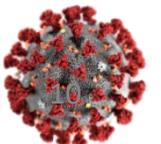
“Everything tech-wise is at my fingertips”



Multi-ethnic men, ages 22-30, mostly single without children, a median income of \$80,000, and an average of \$30,000 in student debt. They live in urban or suburban areas, have bachelor’s degrees and may have graduate schooling. They tend to be pro-Republican and are fairly likely to have voted in the last presidential election.

Their jobs are important to them and they feel as though their education prepared them well for their careers. At work, they are eager to learn new things, frequently question the status quo, tend to be independent and impatient – seeking advancement without “paying their dues” -- are “go-getters,” dislike receiving orders, dislike ambiguity, but will accept feedback that is direct and very specific. They tend to focus on short-term priorities rather than long-term goals. They feel that friendships with their boss and co-workers are marginally important, but they have a tendency to miscommunicate with both because of a lack of awareness of verbal and non-verbal cues.

Although their work is important to them, friends and lifestyle are equally important, so they value their weekends and enjoy travel. They talk to their parents twice a week on average but don’t seek their parents’ advice. They are not interested in philanthropy, civic engagement, or environmental causes. They are busy and impatient, preferring fast service to friendly service. They buy their groceries at convenience stores or eat out and prefer to do non-grocery shopping online. They make their purchase selections primarily on brand-loyalty rather than on competitive-pricing. They are more likely to buy a home than to rent one and if they do rent, they are planning on purchasing a home in the future, although in other ways they tend to live in the moment rather than plan for the future. They are more likely to use a car service than to own a car. They care about their appearance and work out regularly. They are strong users of social media, are very likely to post content online, and consider themselves extremely tech-savvy.



Appendix B: Millennial Animated Persona Descriptions

Millennial Moms

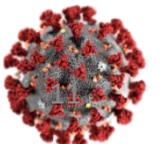
“I’m about working out, seeing the world, and indulging my children”



Multi-ethnic women, 30-37 years-old, married with children ranging in age from toddler to early teens. They live in urban and suburban areas, may be homemakers or professionals working full-time. They have a median household income of \$100,000 and no student debt. They are more likely to be pro-Republican but only somewhat likely to have voted in the last presidential election. Most have at least some college and no interest in going back to school or getting additional job training.

Those that work, like their jobs, are comfortable multi-tasking and working with diverse co-workers, and view a relaxed workplace atmosphere as a top priority. They value flexible work schedules, are not team-oriented – preferring to be left to figure things out on their own - are not interested in developing friendships with their coworkers or their boss, but communicate well with their workplace associates. Friends and lifestyle are at least as important to them as is their job.

In their personal lives, they are very close with their parents, speaking with them approximately 10 times a week and seeking their advice on personal matters. They do not care about philanthropy, civic engagement, or supporting causes such as environmental protection. They own multiple electronic devices such as smartphones and tablets, occasionally communicate in snippets through texting, Facebook, & email, but they prefer face-to-face communication when possible. They seek instant gratification but also set long-term goals. They shop for groceries in grocery stores rather than at convenience stores, valuing price over brand loyalty, and seek restaurants that are fast and casual but also friendly. They prefer home ownership to renting and owning a car is important to them. Working out is very important to them, as is their physical appearance. They like to travel with their family and do so often. Their marriage and their children are the focus of their lives.



Appendix B: Millennial Animated Persona Descriptions

Don't Call Me a Millennial

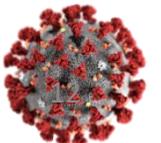
“Business & family are my total focus”



Hispanic, 30-37 years old, working full-time as professionals and business owners who live in rural, suburban, and urban areas of the West Coast. They are slightly more likely to be female than male (60% female/40% male), have at least some college, a median income of \$70,000, and an average of \$15,000 in student debt. The vast majority are married with children ranging in age from toddler to early teens. Politically, they are equally as likely to be Democratic as Republican and are extremely likely to have voted in the last presidential election.

Professionally, they like their jobs and feel that their education and training satisfactorily prepared them for their careers. They are comfortable multi-tasking, are extremely comfortable working with diverse co-workers, value a friendly work environment but prefer individual rather than team-oriented tasks. They have good verbal and nonverbal communication skills, preferring face-to-face conversations, but their tight schedules often result in “snippet” conversations through text, email, and Facebook.

In their personal lives, they speak to their parents once a day and occasionally seek their advice about personal matters and purchase decisions. Their time is not at all flexible: spent at work or with family, not in travel or with friends outside of the office. They shop for groceries at whatever store is in closest proximity (grocery store or convenience store), making purchase decisions quickly and basing those decisions on price rather than brand loyalty. Because their day-to-day lives are rushed, they value fast service in stores and casual restaurants, but still rank “friendly” service as very important. They are interested in saving for the future but also interested in instant gratification. They are not concerned with civic or philanthropic causes nor are they concerned with “green” purchase choices. They lack time for working out and their appearance is not particularly important to them. They do not spend much time on social media sites and are unlikely to contribute content to it, although they own multiple electronic devices such as smartphones and tablets. They are more likely to own a home than to rent and to own a car than to use a car service. Their jobs and their family are their central focus.



Appendix B: Millennial Animated Persona Descriptions

Do the Right Thing Millennials

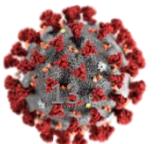
“It’s up to me to improve the world”



Caucasian women, ages 22-37, with a median income of \$40,000 and an average of \$20,000 in student debt. The majority are employed part-time, jumping from one job to another. Many are students living at home with their parents, to whom they turn for personal and career advice. A minority are married with children under 10 years of age. They are likely to be pro-Democratic but not likely to have voted in the last presidential election. They have some college but have not graduated and are seriously considering continuing with or going back to school or getting career training.

They view their job as a way to “pay the bills” rather than as an occupation they enjoy. They are very interested in flexible working hours and a relaxed work environment. Making friends with their co-workers is not a priority, but having a tight bond with a boss who gives frequent feedback and praise and performs the role of a mentor is highly desired. They can be impatient and sometimes will question the status quo, resenting “busy work” but being willing to learn new things. They sometimes have difficulty with verbal and non-verbal cues, which occasionally leads to miscommunication with co-workers, bosses, and friends.

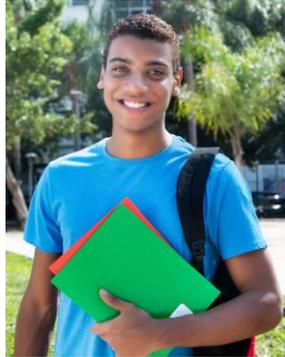
Because most still live at home, they speak with their parents frequently and regularly turn to them for personal and career advice. They spend more time thinking about friends and lifestyle than about work. They enjoy browsing in stores and online and rank the experience of shopping as highly as the actual purchase. Purchase decisions are based on price and the recommendation of friends and family rather than on brand-loyalty. They tend to live in the moment, choosing instant gratification over long-term goals. They are heavy users of social media, are very likely to communicate through instant messaging, texting, Facebook & email rather than through face-to-face communication or telephone conversations, and tend to watch entertainment programs on electronic devices, so they usually have multiple devices such as smartphones, tablets and computers. They do not work out often but do view their appearance as important. They consider philanthropy and civic engagement to be very important and try to “give back” by volunteering time and sometimes purchasing items associated with a particular cause.



Appendix B: Millennial Animated Persona Descriptions

Environmental Millennials

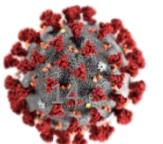
“It’s about my health & the health of the world”



Black, Hispanic, or Asian males, 22-25 years old, who live at home with their parents, usually in urban and rural areas of the US. They are predominantly students working part-time with a median income of \$25,000 and \$25,000 in student debt. They are unmarried with no children and no immediate desire to get married or have children. They have no political party affiliation and are unlikely to have voted in the last presidential election. They tend to be pessimistic about the prospects of their generation and of the planet Earth, believing that it is harder today to save for the future, pay for college, and buy a home than it was for their parents and that the health of the environment is in jeopardy.

When they think about work, they focus on workplace atmosphere rather than on career opportunities – desiring friendships with their co-workers, a relaxed workplace environment with a flexible schedule, a team-oriented structure, and a tight bond with their boss. They dislike receiving orders but are uncomfortable figuring out things on their own, are impatient, seek instant gratification, and are resistant to “paying their dues” on the job, frequently questioning the status quo. At present, they are more interested in friendships and lifestyle than in a career, viewing a job as something to do between weekends.

They view face-to-face communication as unimportant, preferring to convey snippets of information on smartphones and tablets, owning multiple devices and gaming systems, which they upgrade frequently. They have trouble with both verbal and non-verbal communication and experience frequent miscommunication with friends, colleagues, and bosses. They shop for food in convenience stores and frequently buy non-food products online, viewing the shopping experience as more important than the purchase. They value fast more than friendly service, feel that their day-to-day lives are rushed, and make decisions at the last minute. They view the first-hand experience of their friends, the advice of their parents, and online reviews as authoritative. Although they express deep concern for the environment, they are not regularly engaged in philanthropic or civic activities beyond exhibiting some purchase loyalty to consumer brands that have a connection to the environment. They spend a great deal of time on social media, being extremely likely to contribute original content to social media platforms and to desire feedback in return. They also are very willing to engage in such online activities as rating products & services. They are somewhat interested in their appearance and very interested in working out.



Appendix B: Millennial Animated Persona Descriptions

Millennials in Name Only

“Old-school values are important to me”



Caucasian, Black, and Hispanic blue-collar workers who are employed full-time and live predominantly in urban areas. They are equally as likely to be male as female, are 32-37 years old, have a median income of \$75,000 and have no student debt. The majority are married with children ranging in age from toddler to early teens. They are high school graduates who may have some college. They are more likely to self-identify as Democratic than Republican and extremely likely to have voted in the last presidential election. They view their lives as easier than their parents' lives: viewing themselves as more likely than their parents were at the same age to be able to save for the future, pay for college, and buy a home.

Professionally, they like their job but are interested in getting a better one. They are willing to learn new skills on the job but have no interest in returning to school or engaging in unpaid skill-training. At work, they like team-oriented projects, are extremely comfortable working with diverse co-workers, handle stress and rigid work schedules well, acknowledge the need to “pay their dues,” value direct feedback and unambiguous instruction, but once instruction is given, they prefer to figure things out on their own rather than to receive orders. It is important to them to have a friendly relationship with their coworkers, with whom they communicate well, preferring face-to-face conversations over instant messaging, texting, or Facebook. They focus on work during the week and on family during the weekend.

In their personal lives, they talk to their parents once or twice a week but are more likely to seek advice from their peers than from their parents. They feel philanthropy and being civically engaged are very important, but they have limited free-time so they are more likely to contribute their money than their time to a cause and occasionally may make purchase decisions based on product ties to a particular cause. They think carefully before making major purchases and are willing to forego instant gratification in favor of long-term goals. Shopping is viewed as an errand to be accomplished quickly rather than a social activity. Purchase decisions are based on price rather than brand loyalty and purchases are more likely to occur in stores than online. They own a cell-phone, which they keep for a long time, and prefer talking to texting on it. They spend more time reading and watching television sets and less time on electronic devices and on social media sites than their generational counterparts. They are more likely to own a home than to rent one and to own a car than to take a car service. They exercise occasionally and care only moderately about their appearance. Their job, their children, and saving for the future are very important to them.

