Shopper Insight
Frozen
7TH March
2019
Research objectives

UNDERSTANDING SHOPPER BEHAVIOUR TO DRIVE GROWTH WITHIN THE CATEGORY
Freezing of food goes back 1000s of years
Frozen foods celebrating nearly 90 years....

Birdseye introduced the first line of frozen foods for sale to the public in 1930..
Is the era of Big Food coming to an end?

Consumers want to eat healthier and processed-food brands are scrambling to repackage themselves. Is the tide turning against junk food?
Are we entering a new time for frozen food?
“They’re making the food better - the stuff in the box is just better now... it’s better for you and it tastes better. The small companies have been crushing it and now the big guys like Healthy Choice and Smart Ones and Lean Cuisine are all making better food too”

Ken Harris, Cadent Consulting, (Buss, 2019)
Report Outline

Frozen dynamics: today's perceptions

Let's go shopping: the who, what, why

Understanding the new shopper: the dietician's view

Instore immersion & packaging

Opportunities to Drive Purchase – the new rules

Consumer Lifestyle Trends snapshot

Building frozen futures
Methodology and approach
## Qualitative Approach

4 x groups – All to buy at least 2 frozen sub-categories, every 2 weeks or more often;

<table>
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<td>Mixed Family (kids 8-18 years)</td>
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**4 x accompanied shopping sessions**

**1 x expert interview (dietician)**

- Fieldwork conducted in November/December 2018 in the Dublin area.
Quantitative methodology

Interviewing was conducted via B&A’s online panel AcumenPanel.ie

The sample is quota controlled by grocery shopper profile in terms of: gender, age, socio-economic status, and region.

Most recent fieldwork on the project took place between the 4th & 12th of February 2019

820 grocery shoppers were interviewed.
Additional sources from the Thinking House

Plant Based Dietary Lifestyles 2018
Frozen dynamics
Today's perceptions
The L “a”st Aisle

It’s off the radar for half of grocery shoppers
Currently the over-riding perception is that it’s an aisle of convenience yet predominantly unhealthy... a throw back to its original raison d’être... easy convenience.
WORD CLOUD SPONTANEOUS ASSOCIATIONS ROUTED IN CONVENIENCE

Base: All grocery shoppers 820

52% of people think Chips and waffles when they think of the category.

Convenient/Handy

Easy to cook/ Simplicity/ Ready meals/ Pre-prepared/ Practical/Fast food/Back up - always on hand

Pizza (Goodfellas/ Dr Oetker mentioned)

Freshness/Green

Fish fillets, fingers, prawns, pies

Good Quality/ Durable/ Longevity/ Long lasting

Fast/Fast Food/Speedy

Quick/Fast/Spicy

Processed/Additives

Nutritious/ Healthy (good food)

Tasty/Delicious

Desserts/Ice cream, frozen fruit, berries

Unhealthy/ Comfort Food/ Junk/ Rubbish

Cheap/Good value for money/Inexpensive/ Economical

Birds Eye

Chips/Oven fries/Potato/ Wedges/Sweet potato

Meat/Beef/Burgers

Good Quality/ Durable/ Longevity/ Long lasting

Cold/Freezer/Frozen

Good Quality/ Durable/ Longevity/ Long lasting

Unhealthy/ Comfort Food/ Junk/ Rubbish

Green Isle

Good variety/Range/Selection

Processed/Additives

Nutritious/ Healthy (good food)

Tasty/Delicious

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Unhealthy/ Comfort Food/ Junk/ Rubbish

Cheap/Good value for money/Inexpensive/ Economical
The health credentials of fresh versus frozen are not always clear.
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- **Convenient/Handy:** 30 21 35 26 35 34 19 30 30 35 28 30 27 31 28 32 31 32 29
- **Vegetables/Frozen veg/Stir fry – Broccoli, peas:** 17 14 19 22 13 16 18 20 15 24 14 17 13 19 14 18 18 17 17
- **Easy to cook/Simplicity/Ready meals/Pre-prepared/Practical/Fast food/Back up – always on hand:** 13 12 14 16 13 10 9 14 12 16 12 11 14 13 12 15 13 13 13 13
- **Freshness/Green:** 10 7 11 7 7 14 10 10 9 11 8 10 8 10 9 11 10 8
- **Birds Eye:** 9 11 8 5 10 8 13 9 9 7 9 11 9 7 12 9 9
- **Cheap/Good value for money/Inexpensive/Economical:** 9 9 9 13 7 9 5 12 6 12 9 7 7 9 8 10 9
- **Chips/Oven fries/Potato/Wedges/Sweet potato:** 9 11 8 7 10 9 10 8 9 6 11 9 9 9
- **Pizza (Goodfella’s/Or Oktber mentioned):** 9 10 8 10 10 7 4 9 9 10 9 8 10 9 9
- **Quick/Fast/Speedy:** 8 5 10 10 9 7 5 7 9 9 10 7 8 9 3
- **Good quality/Durable/Longevity/Long lasting:** 8 8 8 13 6 6 6 10 7 8 9 8 7
- **Desserts/Ice cream, frozen fruit, berries:** 8 8 8 11 6 7 8 8 8 11 6 7 8 9
- **Cold/Freeze/Frozen:** 7 7 7 8 7 7 4 6 8 9 7 7 7 7 7 7 7 7 7 7 7 7 7 7
- **Unhealthy/Comfort food/Junk/Rubbish:** 7 6 8 15 7 2 3 9 6 14 7 7 7 7 7 7 7 7 7 7 7 7 7
- **Fish – fillets, fingers, prawns, pies:** 7 10 5 5 5 9 10 6 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7
- **Nutritious/Healthy (good food):** 4 2 5 2 2 7 4 5 1 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4
- **Processed/Additives:** 4 3 4 3 3 3 3 3 4 4 3 3 3 3 3 3 3 3 3 3 3 3 3 3
- **Iceland:** 3 3 3 2 5 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3
- **Chicken – burgers, nuggets, goujons,:** 3 3 3 2 2 2 2 2 3 4 4 3 3 3 3 3 3 3 3 3 3 3 3 3
- **Meat/Beef/Burgers:** 3 3 3 4 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3
- **Tasty/ Delicious:** 3 3 3 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
- **Green Isle:** 2 0 0 0 0 0 0 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
- **Good variety/Range/Selection:** 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2
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**Health is not highly scored**
58% believe frozen does not taste as good as fresh
A third of people say that they only really buy it sometimes...and that they can take it or leave it
It’s relevance is being more challenged in today's world.
An Instagram generation who query frozen:

Not on their radar
Think burgers, chips
An aisle often to be avoided..
“Surprised to hear about goodness”
What role can frozen play?
Shopping..
The who, what, why, when..
53% consuming frozen food monthly
Frozen vegetables are the most commonly consumed frozen food (weekly+)

Base: All grocery shoppers - 820

- Frozen Vegetables: 53%
- Frozen Chips: 34%
- Frozen Meat / poultry joints: 29%
- Frozen chicken (goujons/tenders/strips/burgers): 25%
- Ice Cream: 24%
- Frozen Fish (breaded): 21%
- Frozen pizza: 21%
- Frozen fruit: 18%
- Frozen beef burgers: 12%
- Frozen waffles: 12%
- Frozen cakes/desserts/yogurts: 10%
- Frozen ready meals: 9%
- Frozen party food (cocktail sausages/ samosas/ vol-au-vents, etc): 9%

Frozen meat is consumed by 3 in 10 weekly or more
Women top the poll for consumption of fruit and vegetables.

55% vegetables
20% fruit

49% vegetables
14% fruit
Interesting and emerging uses..

- Breakfast (fruit, waffles)
- Snacking
- Part dinner (frozen veg)
- Baby Food frozen
- Weekend chill out (pizza chips)
- Full dinner (pizza & chips), ready meal
- Friday night/weekend treat
- Teenage grazing (pizza, waffles)
- Left over meals
- Meal aides (onions, herbs ec)
- Prepared easy vegetables (no waste)
- Convenient meals or part meals
- Soups/Stews
- Brunch Saturday
- Dessert
- Celebrations (birthday, Christmas)
These emergent uses are often relevant to a different type of shopper. 

“Millennials demand for frozen has been somewhat of a surprising development. Generation Y transformed the industry with its overwhelming call for more nutritious foods and beverages and those that were minimally processed with clean ingredients labels and preferably fresh or even “farm to table”. “

(Buss, 2019)

Older shoppers remain more likely to purchase frozen food, but tend to spend a lower proportion of their total food spend on frozen goods than younger shoppers. 78.1% of 55+ frozen shoppers spend less than 20.0% of food spend on frozen.

(Global Data, 2018)
Understanding this shopper some more
General Healthier Eating

Fuelled By social media

Authentic Consumption

Push factor for frozen

Beef and Dairy Struggle

Vegetarianism & Veganism

New emerging categories

Providing new alternatives

The dietitian experience

The Thinking House
63% of vegans stated that food choices are a big part of their identity
Ye didn’t leave the hot water on, did you?
Shopping.. Store submersion
8 in 10 feel that quality and variety has improved
45% agree that nothing stands out

56% don’t like spending time browsing the aisle

6 in 10 would like to see new products and brands in the aisle
72% agree that it's easy to see the special offers and prices of different products in the frozen section and more than half switch brands or products based on these offers.
80% of people don’t see themselves eating more frozen in the future
Tesco, Aldi and Dunnes Stores do well on frozen food (most often store) Iceland also more prominent for this category, than normal

Base: all grocery shoppers - 820
The stores story is not dramatically different.

Tesco, Supervalu and Dunnes are good for stocking brands. Darker fridges and those at eye level are seen as “the newer” and often more preferred layouts and appear more particular to Aldi/Dunnes.

Aldi has a good range of frozen products Iceland is frozen!
Shopping...
Packaging
A category where much of the packaging aesthetic is perceived as dated
..but change is happening
The category is definitely moving towards a more clean, simple, fresh looking aesthetic

I bought Strong Roots cauliflower hash browns just because they didn’t look like cauliflower. I thought they were burgers when I picked them up. I wouldn’t eat cauliflower, but they just look lovely, and the mango as well. The fruit mango, that looks gorgeous.

A nice picture and you’re going to pick it up and read it.

Spinach based pizza, that looks gorgeous. I know I’d eat that, and I know my daughter would love that as well, and I know it’s pizza, but it looks healthier.

It looks delicious, and, I suppose, it’s telling me that the meat is organic.
Don’t underestimate the role of packaging format

- Malleable packaging “moulds”
- Boxes often don’t fit in freezer
- Resealable packs also important
Opportunities to drive purchase
Understanding some new rules
Convenience is king. How do we add value here – 80% see the category as convenient

But 45% say preparing raw vegetable is a hassle
Frozen ready meals are more positively endorsed in dietary circles.

40% 25-34s have consumed and purchased some sort of dietary brands such as Unislim and WW

These brands are big supporters of frozen foods

This is an opportunity to bring a younger demographic into frozen in new guises: @strong versus slim..frozen fitness..!
Frozen credentials need a boosting: give people more reasons to get excited about frozen..

@Build taste credentials

@Build health credentials

40% disagree that frozen foods are as good for you as fresh

57% think frozen food does not taste as good as fresh food
6 in 10 have used frozen veg in casseroles, stews, soups

@Build the perfect frozen solutions: aids, soups, etc

“If I want to buy a fresh banana, I’m using it for I don’t know, putting it into porridge. If I’m using frozen banana or frozen fruit, I’m putting it into a smoothie. It’s the same with vegetables. If I’m roasting vegetables then I buy fresh but if I’m going to be using it in a soup or a stew or something like that, then I can buy the frozen.”
Build the culinary credentials of frozen...

63% of people are more comfortable using chilled food than frozen food in cooking.

34% of 18-34s would be interested in a frozen meal kit.

@createcookwithfrozenfortitudeandfearlessnessandfun!
Provenance is desirable and linking provenance with “speed of freshness” even better..think Picard

83% would prefer to know my frozen meat/fish was frozen as quickly as possible, while still fresh

@Build..fast..farm to freezerstories
@every word counts.

64% regularly check the nutritionals

Natural and cleaner ingredients profile should be highlighted
The storage battle

Nearly 6 in 10 say that the lack of freezer space limits the amount of product they can buy!

The creation of smaller packs, refillable packs, malleable packs, meal aides..could all could help here
Its not all about health!!.
Base: All grocery shoppers - 820

<table>
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<th>Monthly +</th>
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<td>Frozen fish (breaded)</td>
<td>44</td>
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<td>Frozen meat/poultry joints</td>
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<td>Frozen party food</td>
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The consumer of tomorrow..
The Consumer Lifestyle Trends represent the biggest trends shaping people’s lives over the next 3-5 years. By keeping up with trends and understanding what’s coming next, the programme helps companies within the food & drink industry in Ireland to better prepare for the future needs and desires of their consumers.

**Engaging Experiences**
Consumers want moments of discovery and delight that enhance their day, sharing exciting stories and spaces with others.

**Health & Wellbeing**
Consumers want to eat, drink and live to optimise their body’s systems, to feel better than well today and tomorrow.

**Fuller Lives**
Consumers want to use their time to be as productive and sociable as possible, flowing from one thing to the next - and want to be helped, not hindered, by tech.

**Responsible Living**
Consumers want to have a positive impact on society and the environment, and take pride in a sustainable way of living.

**Community & Identity**
Consumers want to express the views and values of themselves and their community, and have their uniqueness and creativity respected and celebrated.
I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others…
I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living...
WHAT'S DRIVING THE TREND?

Drivers

HOW IS IT MANIFESTING?

Sub-Trends

Supply Chain Laid Bare

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Increasingly powerful and accurate technologies will provide proof of this from independent sources.

Innovating against waste

War on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream.

Local Action

With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.

Eco-status

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are premium in look and feel, and are markers of status.

Increasing Environmental Pressure

1. 120 million more hectares of natural habitat need to be converted to farmland to meet demand for food by 2050.

Rise of Protectionism and Nationalism

1. From January 2018 China has banned imports of plastic waste from other countries.

Rapid Urbanisation

1. Cities are responsible for 67% of the total global energy consumption and more than 70% of greenhouse gas emissions.

Engineering Goodness

Innovating Against Waste

Image Source: Nestle on Flickr (CC BY-SA 3.0)
https://www.flickr.com/photos/nestle/46134189344/
I want to eat, drink and live to optimise my body’s systems, to feel better than well today and tomorrow…
Rediscovering natural goodness

Engineering goodness
I want to use my time to be as productive and sociable as possible, flowing from one thing to the next - and helped, not hindered, by tech...
WHAT'S DRIVING THE TREND?:
DRIVERS

HOW IS IT MANIFESTING?:
SUB-TRENDS

VEGAN MEAL KIT DELIVERY COMPANY IS FEEDING MILLIONS OF AMERICANS WITH PLANTS

Delivery 2.0

Flexi Food
I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated…
“The category is promising, there are lots of launches and lots of novelty. Many years ago it was just old TV dinners and mystery meats sitting in the case. Now there are a lot of new flavours and colours and new brands, and products can deliver. So the frozen market can now advance”

Ken Harris, Cadent Consulting, (Buss, 2019)
@ Embrace the freezer

“It’s a shop in your own home”
FROZEN FUTURES

Embrace Indulgence
Eco Ethical

Build sustainable food stories – let consumers know where their products are from and how they were created.

New packaging formats – reduce amount used or have new formats.

Malleable packaging may be way forward – no cardboard = less waste + more room in freezer.
Less is more with consumers.

Want to nourish their bodies with good foods/drinks but still enjoy life and not miss out – like products that meet these wants

Clean Foods? Functional Foods? Foods that offer specific benefits and call these out.

Changes in dietary lifestyles? Veganism, Dairy-Free, Gluten-Free, etc.
Convenience is key with consumers – anything that can make their lives a little easier and save time.

Pre-cut vegetables to easy-to-use or easy-to-prepare products.

Want everyday products that save time, but aren’t ‘bad’ for them.

They want ‘faster than fast, but better’.

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Super Easy

Image source: GNPD
Total meal

Frozen can provide a full meal, without any of the hassle!

From frozen meat to frozen pasta, different elements and products can create full meal solutions.

Frozen herbs and vegetables = all of the bits none of the hassle

Raise awareness and educate consumers about different ways your products can be used.

Not just one element – it can cover them all!
Embrace indulgence!

Consumers are more mindful of what they eat and nourish their bodies with, but also like to have ‘cheat meals’ or ‘treats’.

Be brave if your product is pure indulgence – call it out, showcase it!
Add-Ins and Aids

Highlight all the great uses for frozen when it comes to improving or enhancing meals.

Could look at it from the context of health and those macro-counting and calorie-tracking?

From soups to sauces, smoothies to stews – showcase their versatility and value between recipes

Image sources: Foodiesfeed and Pixabay
Reach out to as many consumers as possible! Students; families with young children; fitness fans who meal prep – solve their meal problems!

Educate shoppers – use products in new and novel ways. Could this be frozen meal kits – bought or delivered?

Reinforce the idea of convenience but also bring in new language – treat, health, indulgence, etc.
Inspire me

Make frozen sing – use brand building activities to engage and educate consumers about the products.

Celebrate frozen – change the perception of frozen being lower quality

Give consumers the confidence to cook with frozen!
Inspire them to try new flavours and new recipes and share their ‘Instagram worthy’ creations online

Image source: GNPD
Consumers love both personalisation and customisation

Show them how they can enhance your products in unique and wonderful ways that appeal to them!
Or, how they can enhance other recipes with your products!

From adding new ingredients to a margarita pizza to topping frozen cauliflower with cheese – the world is their oyster!
Frozen Fun!

Make frozen fun for consumers!

Can this be done with creative colours? Purple potatoes, white strawberries – making things more ‘Instagrammable’ and attention grabbing

Old favourites in new formats? Use new, fun, evocative language to entice consumers!
Shopper
Cat Man

Make merchandising magic and mind-changing!

Frozen aisle can be somewhat boring and plain – how can this be improved?

Take note of examples seen in other markets – great ways to seduce shoppers

Image source: IGD
Beacon Brand

Be the Beacon Brand

Use disruptive design and imaginative innovation to convince shoppers

Who is the next Strong Roots!? They broke away from stereotypical flavors and packaging

Image source: GNPD
Comfort

Many shoppers think frozen aisle is uncomfortable – cold and colourless. Has quite a sterile feeling.

How can the frozen aisle be more warm and welcoming?

Use new lighting and different colours.
Less white/grey freezers
Freezer doors
Help shoppers make quick decisions

Image source: IGD
Flow

Make the frozen aisle shopper-centric – easy to navigate units and shelves

Logical, logistical layout – can this be arranged by occasion rather than product type?

Ensure that it makes sense – sense that you can see!

Impactful information!
Frozen sometimes an afterthought – make sure it is in the **right place at the right time**

Can we be located elsewhere?

Use more gondolas and end freezers around store – showcase frozen as complements to other categories (frozen veg at end of meat aisle)

Image source: IGD
What Does 90 look like?
References:


Image sources:

- Flickr
- Creative Commons
- IGD
- Pixabay
- Pexels
- Mintel - GNPD
- Unsplash