The Future of Frozen Foods in the UK

BORD BIA
Thinking House

Introduction

This report is intended to be used as a strategic planning resource for your organisation.

The insights are built on a solid foundation of consumer and industry research and the emergent themes represent potential pathways for future innovation in the frozen food sector in the UK.

Photo by JACHYM MICHAL on Unsplash

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With Agency Partners:

What We Did?

1. Desk Review

We reviewed an extensive array of third party and information in the public domain related to frozen food. This is considered and reflected throughout the trend's analysis.

2.Expert Interviews

We talked to a mix of local and global experts in the frozen food category to get clarity and alignment in relation to current and future trends in the market.

3. Industry

We interviewed a selection of small and large frozen food producers to explore their perspective on the industry and the key trends in the future.

4.Consumer Councils

We conducted four online focus groups in the UK, each focusing on a frozen food category, to hear consumers perspectives, understand potential trends and co-create innovations for the future.

5.Future Survey

We surveyed almost 1,553 in the UK, with 200 of these being from Northern Ireland. Included reaction to potential "futures" and attitudinal insights from the markets.

Photo by Skye Studios on Unsplash

A Big Thank you to our Contributors

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Photo by Kelly Sikkema on Unsplash

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Navigating the Report

SETTING THE SCENE
Current frozen performance in The UK and forces to maintain growth

THE FROZEN SHOPPER
Shopper behaviours, attitudes and segments

KEY CATEGORY DEEPDIVES
For Frozen Pizza, Ready Meals, Desserts & Ice Cream and Bakery

FROZEN FUTURES FRAMEWORK
Identifying the core consumer led territories for insight led innovation

PRIORITISING THE FUTURES OPPORTUNITY
Evaluating Futures performance by key shopper Type to identify priority opportunities

FUTURES LED INNOVATION TOOLKIT
Supporting you to bring consumer led ideas to life

Photo by davide ragusa on Unsplash

Setting the Scene

Consumers are buying more frozen food than ever before

According to Kantar, the category finished last year with an additional **€930m in value sales (+14.4%)** to a category now worth 7.4bn *(Kantar March 2021).*

The frozen category grew ahead of the retail channel at +11.5% and also ahead of its chilled and fresh categories. 4.1bn frozen units were sold last year which is +10.9% YoY - ahead of total grocery (at 7.9%).

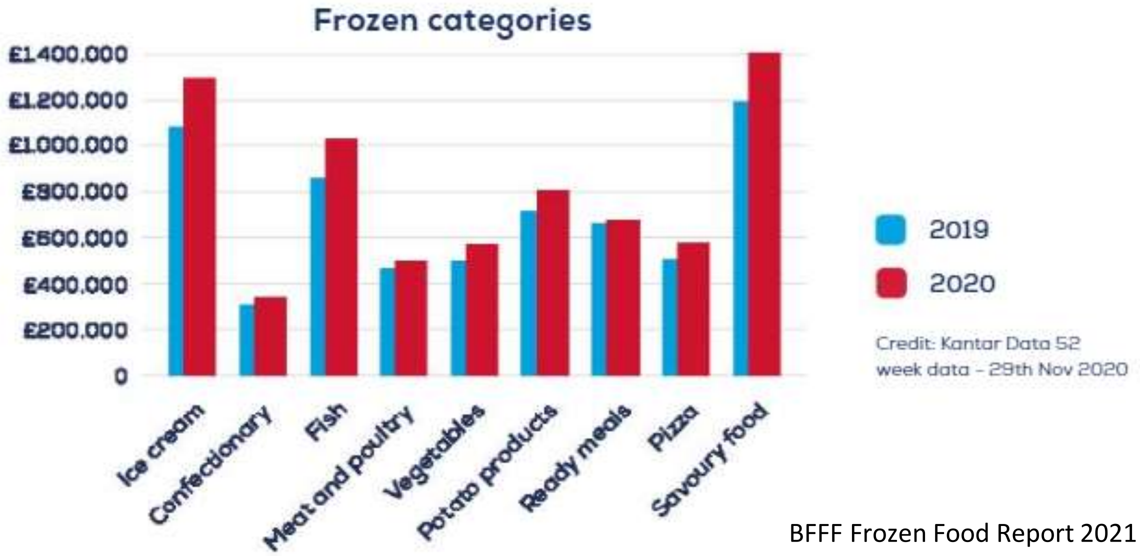
British Frozen Food Federation, April 2021

"Our sales for January are double last January"

Industry interview

Photo by Egor Kamelev on Pexels

While all sub categories experienced value growth in 2020, the spike overall is driven particularly by Ice cream, Fish and Savoury in particular.



BFFF Frozen Food Report 2021

Photo by Albany Capture on Unsplash

Covid-19 has been a big contributor to this growth by as people gravitate towards foods with longer shelf lives

The initial lockdown drove frozen food sales ***up by 28%*** *in the UK*
Food Navigator, 2020

Photo by Victor He on Unsplash

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So how do we maintain this exponential growth in a post pandemic world?

Numerous sources point towards these trends for continued growth within this category:

- **More engaging convenience**
- **Accommodating the needs of the new generation**
- **Willingness to explore**
- **Enhancing the value for money equation**

Photo by wayhomestudio on Freepix

MORE ENGAGING CONVENIENCE

Even more so in a post pandemic world, time outside of a career, commuting, socialising and family is hard to come by and hence consumers are constantly searching for ways to reduce meal preparation time without sacrificing the quality of the food. Consumers will be looking **for 'co-creation' frozen offerings** that remain convenient.

"The collision of convenience and quality, which frozen foods can provide, creates a perfect opportunity for fine food retailers."

Specialitymagazine.com

Photo by misslemon on Freepix

ACCOMMODATING THE NEEDS OF THE NEW GENERATION

Younger generations are reversing the mindset that frozen food means unhealthy. This is evident through them stocking up on healthy frozen options and by beginning to buy more frozen equivalents to fresh.

They are also likely to be early adopters of NPDs within this space given their likelihood to try new frozen foods.

A key attraction of frozen foods for the younger generations are it's longer shelf life, reduced waste and value for money.

26% of 18-24 year olds are **buying more frozen equivalents** of their regular fresh items.

40% have been **stocking up on healthy frozen** options which have included frozen vegetables, fruit, meat and fish.

31% of this same cohort are **trying new frozen foods** such as meat substitutes.

Food Navigator, 2020

Photo by Freepix

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WILLINGNESS TO EXPLORE

The continuing rise in sales of Frozen Foods is **driving innovation** within grocery, which is resulting in more consumers entering into the frozen space.

Recent research revealed that shoppers are more receptive to innovation within frozen, with **50% stating they would try something different:**
(2021 Frozen Food Report)

"Individual retailers have reported a huge surge in frozen sales during lockdown. What's really encouraging is that quality and innovation is attracting new younger consumers to the category as well as exciting our traditional shoppers."

Richard Harrow, 2021

Photo by aleksandarlittlewolf on Freepix

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ENHANCING THE VALUE FOR MONEY EQUATION

Frozen Food Europe reports **value for money** is one of the main reasons consumers will continue to purchase frozen food in a **post pandemic world.**

However, the challenge for the industry is to continue to show the value of frozen food beyond the actual price point.

Brands have been working hard to change the perception of frozen food from being a cheap and low quality option to highlighting it's quality and nutritional value. In recent years there has been a positive change in consumer's attitudes towards frozen food but this needs to continue in order for consumers to see the value in frozen food beyond the lowest price point.

Specialitymagazine.com

Photo by Skitterphoto on Pexels

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So what do we see?

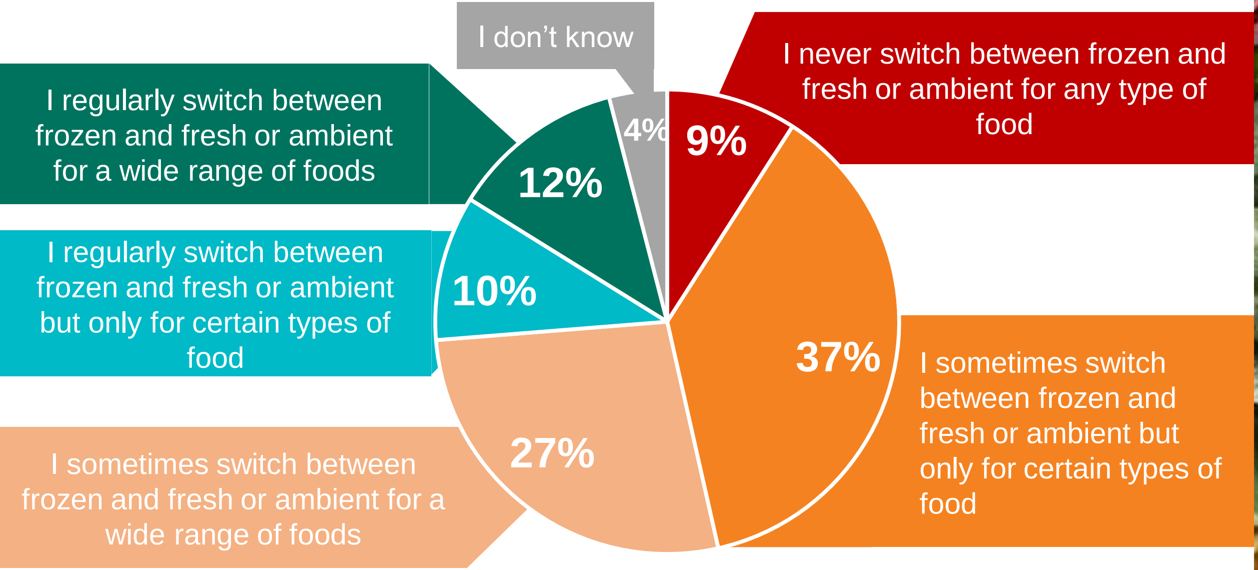
A series of trends that will help sustain growth of the frozen category in the UK market beyond the Covid-19 pandemic.

We now explore the UK frozen food shopper in terms of their attitudes, behaviours and an understanding of where these future trends will resonate best…

Source: Freepix

The Frozen Shopper

Almost 9 in 10 UK frozen food shoppers are open to switching between frozen and fresh… especially for certain types of food



Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

Which of the following best describes you when it comes to switching between frozen and fresh or ambient for the food you buy for your household?

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Volume and value growth for Frozen in the UK market coincides with perceived improvement of the quality and variety available to shoppers

Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

"

91%

of Frozen Food buyers feel the variety of frozen food has improved in recent years

91%

of Frozen Food buyers feel the quality of frozen food has improved in recent years"

83%

of Frozen Food buyers feel they are seeing a lot more interesting and exciting frozen foods in my supermarket of late

"

Photo by Cagkan Freepix

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Despite enhancements around quality and variety evident, shoppers are looking for reassurance around freshness credentials

Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

> “88% of Frozen Food buyers would prefer to know their frozen food was frozen as quickly as possible while still fresh”

Photo by Freepix

Frozen shoppers in the UK are very confident about the nutrition based credentials of frozen food and regularly check for this content

Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

83% of Frozen Food buyers feel Frozen food is just as nutritious as fresh food

67% of Frozen Food buyers regularly check the nutritional content of the frozen food they buy

Photo by Freepix

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The lure of frozen food is apparent for those with busy lives and lacking confidence to scratch cook, while limited freezer space at home limits the quantity of frozen purchase for many

Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

70%

of Frozen Food buyers feel the lack of freezer space at home limits the amount of frozen food I can buy

59%

of Frozen Food buyers feel it is hard to find the time to prepare meals from scratch

56%

of Frozen Food buyers find preparing raw vegetables a hassle

Photo by Freepix

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A segmentation of these attitudes to Frozen Food identifies n=4 key cohorts that make up the UK Frozen Food shopper…

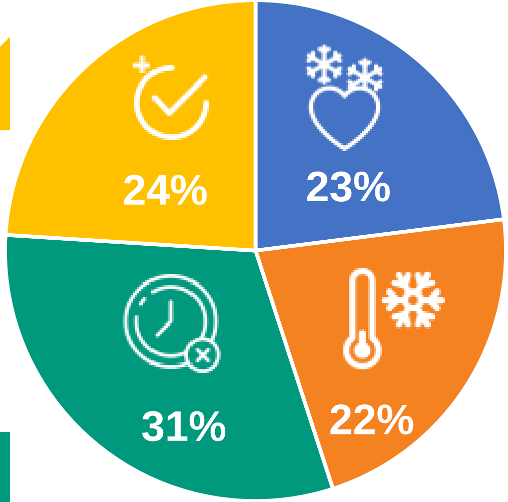
Source: Opinions 2021, all regular buyers of Frozen Food in the UK (n=1,553)

Back Up Buyers

Seek out frozen when there are limited other alternatives and feel fresh is better

Frozen Embracers

Strong commitment to the category and shop it like they are shopping 'Fresh' Food



High volume frozen buyers where convenience is key to accommodate busy lives

Simplicity Seekers

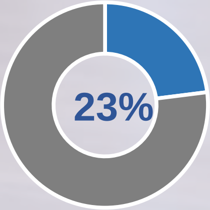
Seeing the benefits of Frozen of late and the improvement on offerings evident.

Recent Engagers

Focus on Frozen Embracers

Strong commitment to the category and shop it like they are shopping 'Fresh' Food

WHO ARE THEY?



Of total UK frozen food shoppers.

More affluent established and mature families life-stages.

"I like spending time browsing the frozen aisles when shopping"

"I regularly check the nutritional content of the frozen food I buy"

"I regularly switch the frozen food product I intended to buy if special offer or similar product"

CURRENT PURCAHSE BEHAVIOUR

High volume buyers across all main frozen sub categories of interest, in particular frozen ***bakery, vegetables, meat, fish, plant-based, ice cream/ desserts and pizza.***

OPPORTUNITY TO ENGAGE?

HIGH

Tap into the ***'Willingness to explore'*** and ***'More engaging convenience'*** trends.

Messaging should emphasise ***better taste***, ***uniqueness of offering***, ***nutritional benefits*** and ***quality of ingredients***.

Photo by krakenimages on Unsplash

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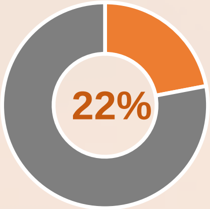
Focus on Recent Engagers

Seeing the benefits of Frozen of late and the improvement on offerings evident.

WHO ARE THEY?



Of total UK frozen food shoppers.

Post family life-stages

"The quality of frozen food has improved in recent years"

"The variety of frozen food has improved in recent years"

"I am seeing a lot more interesting and exciting frozen foods in my supermarket of late"

CURRENT PURCAHSE BEHAVIOUR

Lower volume buyers (given life-stage needs) but greatest traction for **'meal-based solutions'**, in particular ***frozen ready meals*** and ***other centre plate options*** (e.g. frozen meat and fish).

OPPORTUNITY TO ENGAGE?

MODERATE - HIGH

Tap into the ***'Willingness to explore'*** and ***'Enhancing the value for money'*** trends.

Messaging should emphasise ***better taste*** and ***uniqueness of offering*** credentials.

Photo by Esther Ann on Unsplash

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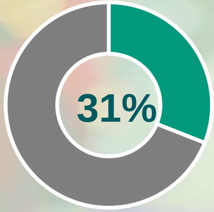
Focus on Simplicity Seekers

High volume frozen buyers where convenience is key to accommodate busy lives

WHO ARE THEY?



Of total UK frozen food shoppers.

Pre-family and young family life-stages.

"Its hard to find the time to prepare meals from scratch"

"The lack of freezer space I have at home limits the amount of frozen food I can buy"

"I sometimes feel guilty when I eat frozen food"

CURRENT PURCAHSE BEHAVIOUR

High volume buyers especially for **'meal-based solutions'**, in particular ***frozen ready meals, pizza*** *and* ***meat.*** Also highly engaged with the ***frozen bakery*** category.

OPPORTUNITY TO ENGAGE?

HIGH

Tap into the ***'Accommodating the needs of the new generation', 'Enhancing the value for money'*** and ***'More engaging convenience'*** trends.

Messaging should emphasise ***better taste, value for money*** and ***clear nutritional benefits.***

Photo by Saulo Mohana on Unsplash

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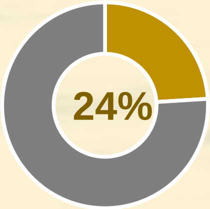
Focus on Back up Buyers

Seek out frozen when there are limited other alternatives and feel fresh is better

WHO ARE THEY?



Of total UK frozen food shoppers.

Mature families and post family life-stages.

"To me frozen food is a back up to fresh food when necessary"

"Frozen food does not taste as good as fresh food"

"I would prefer to know my frozen food was frozen as quickly as possible while still fresh"

CURRENT PURCAHSE BEHAVIOUR

Lower volume buyers that engage with frozen for an **easy meal replacement** when the situation arises and have greatest engagement with ***frozen pizza, fish and ice cream/ desserts.***

OPPORTUNITY TO ENGAGE?

MODERATE

Tap into the ***'Enhancing the value for money'*** and ***'Willingness to explore'*** trends.

Messaging should emphasise ***better taste, value for money*** and ***freshness credentials.***

Photo by Patricia Prudente on Unsplash

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So what do we see?

Frozen has clearly grown in shopper repertoires in the UK market and segmentation identifies n=4 key shopper cohorts, each with specific needs and opportunity territories to best engage to drive volume growth for frozen going forward.

From the shopper perspective we now explore shopper behaviour within the main sub categories of interest for this study *(frozen pizza, frozen bakery, ice cream/ desserts and frozen ready meals).*

Source: Freepix

FOCUS ON FROZEN PIZZA

Among regular buyers (every 2-3 weeks or more)

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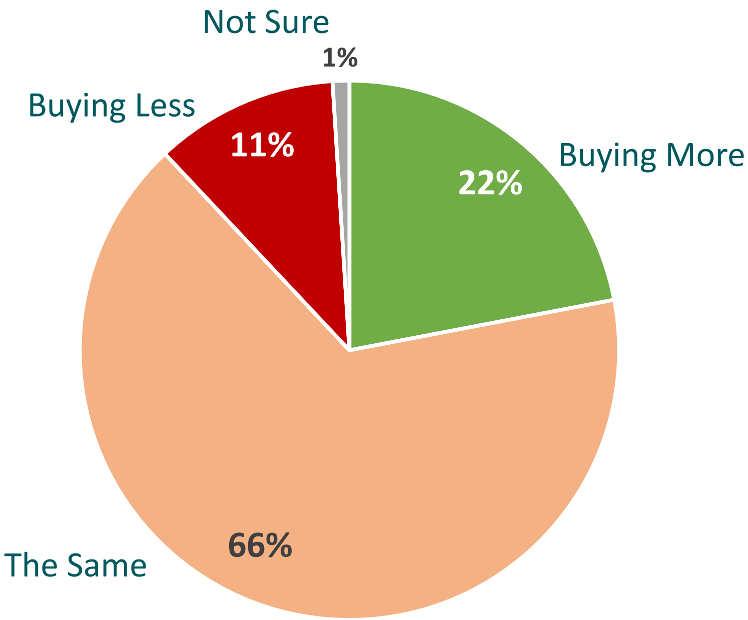
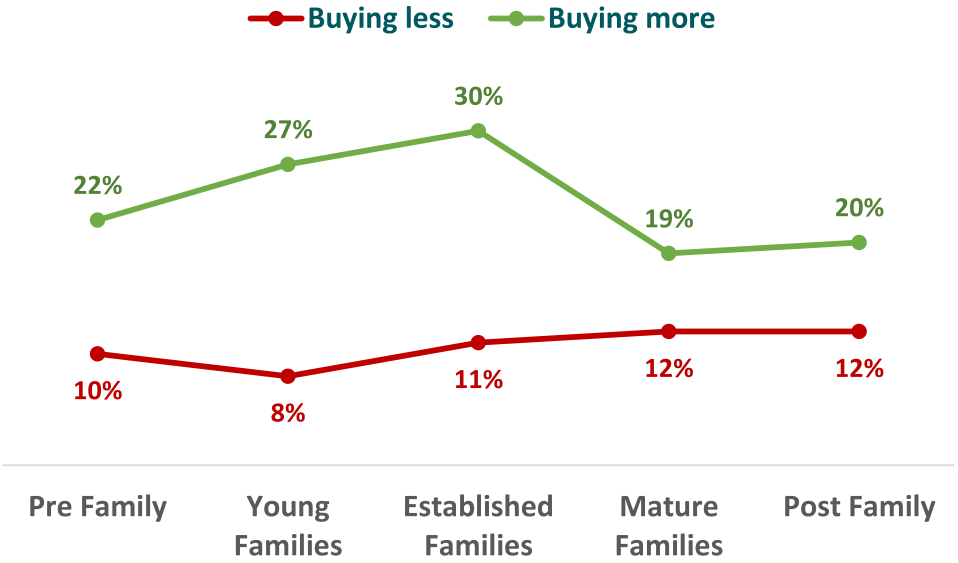
Photo by Daria Shevtsova on Unsplash

Frozen Pizza: Claimed Purchase Penetration vs. 2 years ago

Source: Opinions 2021, all regular buyers of Frozen Pizza in the UK (N=600)



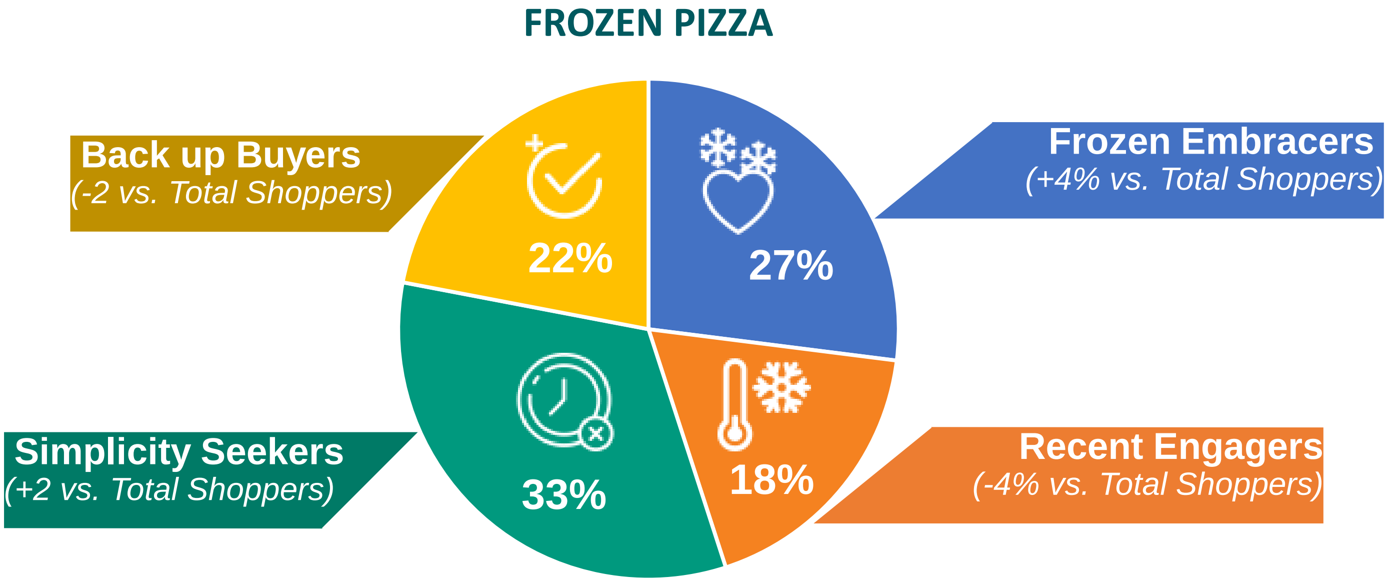


Recent uplift in volume appears driven by pre family and younger families in particular.

Would you say you are buying less, the same amount or more Frozen Pizza compared to 2 years ago?

Frozen Pizza: Regular Buyer Penetration by Segment

Source: Opinions 2021, all regular buyers of Frozen Pizza in the UK (N=600)



All segments engaging strongly in Frozen Pizza – most notably the Simplicity Seeker and Frozen Embracer cohorts.

Recent NPD launches worldwide within Frozen Pizzas has focussed on using premium ingredients and sustainable packaging

Mediterranean Roasted Vegetable

Where? The UK

What do they offer? One Planet pizza has become known for it's plant based pizza offerings and for focusing on having a low carbon footprint. Absolutely No Palm Oil, Suitable for Vegetarians & Vegans.

Where? The UK

What do they offer? Crosta & Mollica Pizzeria Bosco Wood-Fired Sourdough Pizza with Mushrooms and Truffle & Garlic Cream Sauce is made by artisanal bakers with a traditional slow-proved sourdough baked in a wood-fired oven for an authentic pizzeria taste.

Where? South Korea

What do they offer? Pulmuone No Edge Fire Grilled Bulgogi Pizza is completely covered with toppings and features a premium blend of mozzarella, cheddar, gouda and provolone. This stone-baked pizza can also be cooked in an air fryer.

Source: Mintel

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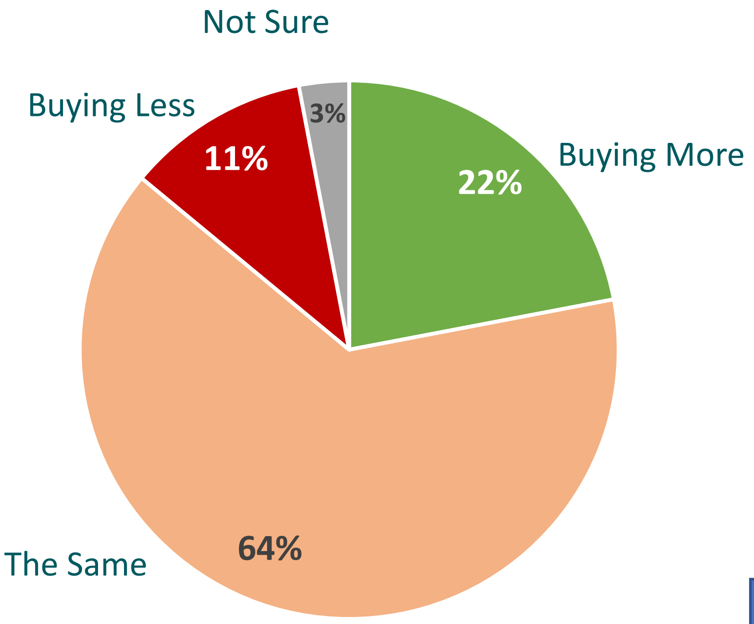
FOCUS ON FROZEN BAKERY

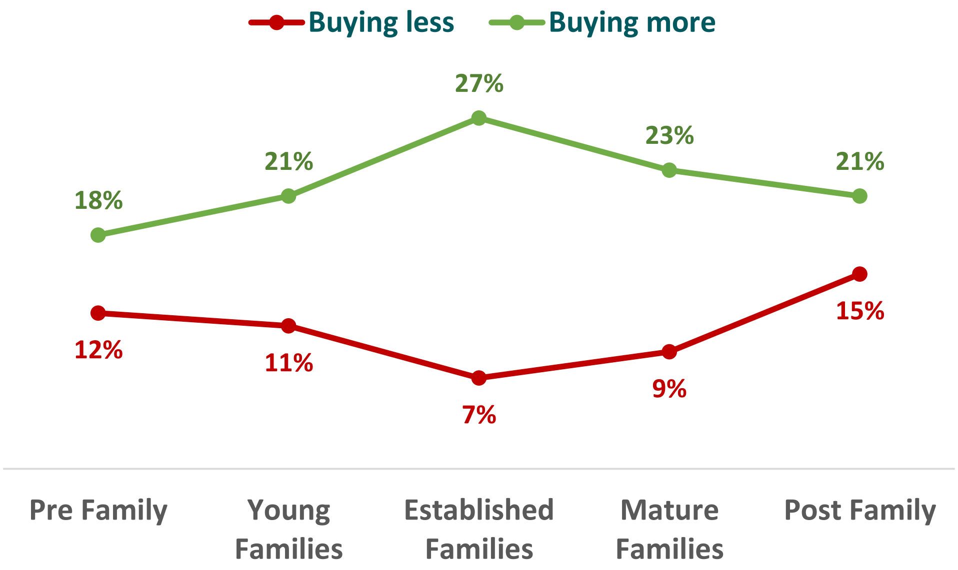
Among regular buyers (monthly or more)

Photo by Pixabay on Pexels

Frozen Bakery: Claimed Purchase Penetration vs. 2 years ago

Source: Opinions 2021, all regular buyers of Frozen Bakery in the UK (N=600)





Recent uplift in volume appears driven by established and mature families in particular.

Would you say you are buying less, the same amount or more Frozen Bakery compared to 2 years ago?

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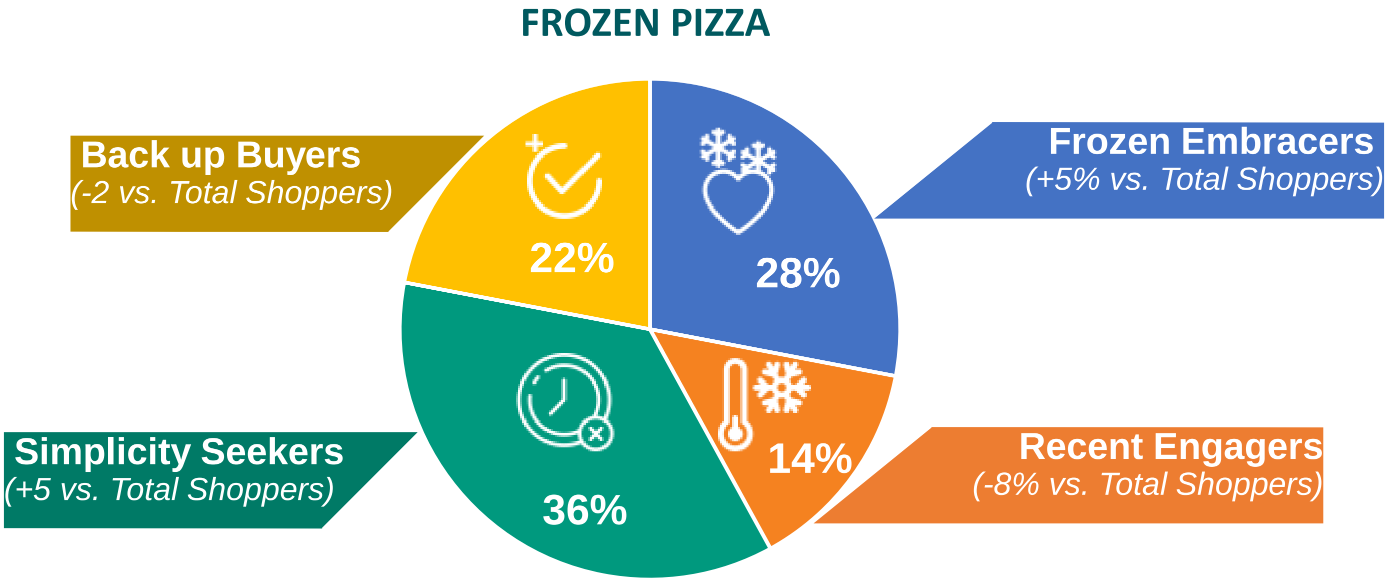
Frozen Bakery: Regular Buyer Penetration by Segment

Source: Opinions 2021, all regular buyers of Frozen Bakery in the UK (N=600)



Heartland for Frozen Bakery resides with Simplicity Seekers and Frozen Embracers, but Back Up Buyers also prevalent.

Recent NPD launches worldwide within frozen bakery have focussed on convenience and indulgence


Dawn Foods releases a full vegan bakery range

Where? Europe

What do they offer? For ultimate convenience, Dawn Foods has also developed a thaw-and-serve frozen vegan range which includes a wide variety of American muffins, cookies and brownies – with delicious flavours including double chocolate, very berry and lemon & poppy seed – guaranteeing the highest quality and reliability with zero compromise on taste.

Source: Dawnfoods

Where? Tesco

What do they offer? 4 Frozen puff pastry cases with a custard filling. These tarts are made in Portugal to an authentic recipe and have a crumbly pastry with a velvety custard filling. To be enjoyed warm, fresh from the oven.

Where? UK

What do they offer? The Bakery Mini All Butter Pastries have been added to the range. The ready to bake product is made with butter and contains flaky mini croissants, pains au chocolat and pains aux raisins. It is suitable for vegetarians, can be baked in 16 to 18 minutes and retails in a recyclable 340g pack with 12 units.

Source: Mintel

FOCUS ON FROZEN ICE-CREAM/ DESSERTS

Among regular buyers (every 2-3 weeks or more)

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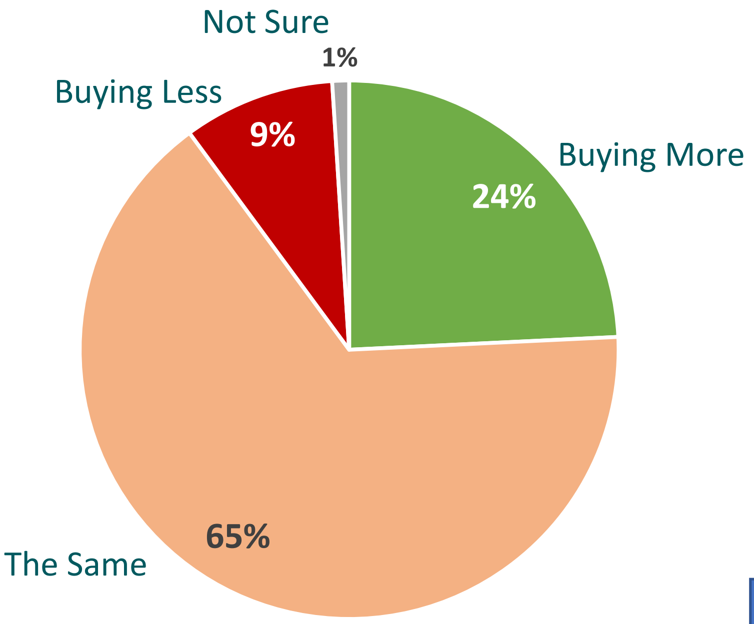
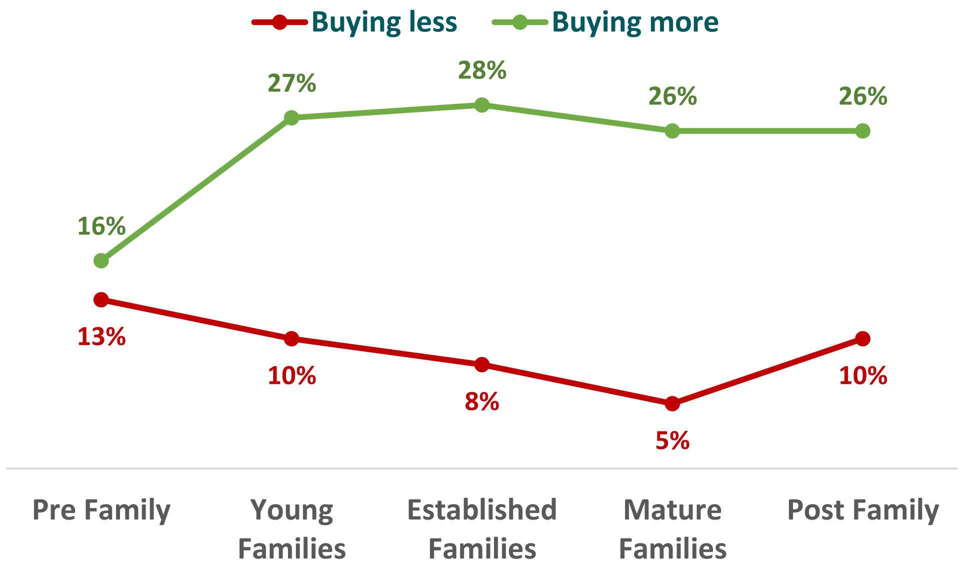
Photo by Daria Shevtsova on Pexels

Frozen Ice-Cream/ Desserts: Claimed Purchase Penetration vs. 2 years ago

Source: Opinions 2021, all regular buyers of Frozen Desserts/ Ice Cream in the UK (N=600)



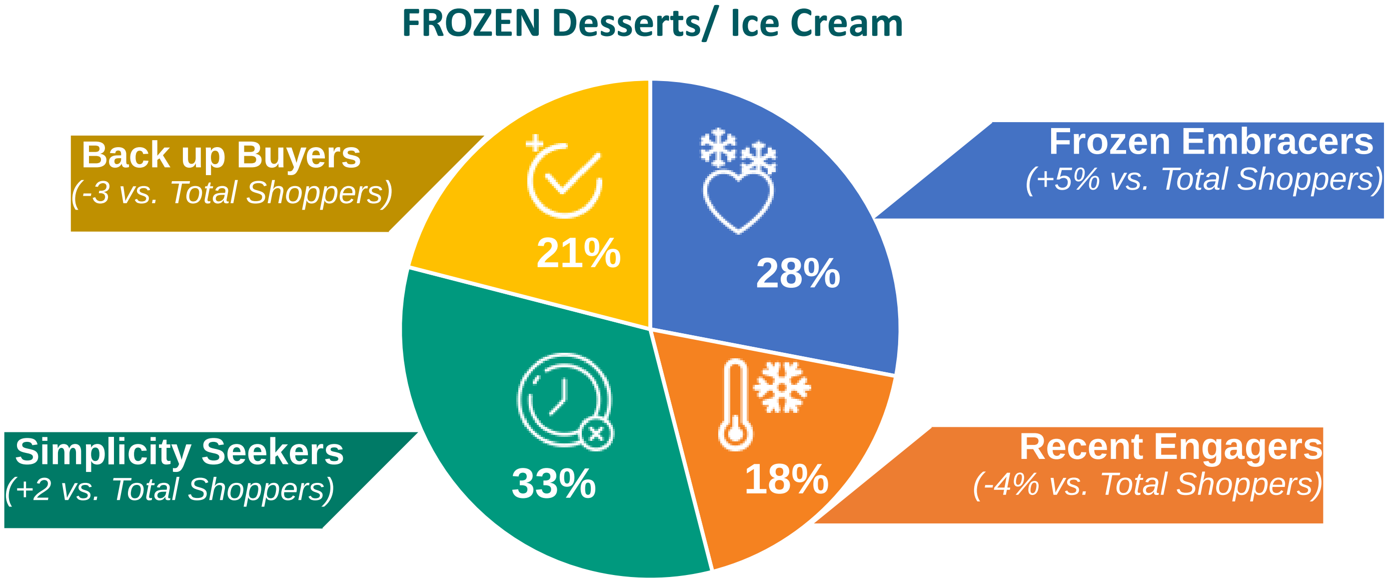


Recent uplift in volume appears driven by all life-stages outside of Pre Families

Would you say you are buying less, the same amount or more Frozen Desserts/ Ice Cream compared to 2 years ago?

Frozen Desserts/ Ice-Cream: Regular Buyer Penetration by Segment

Source: Opinions 2021, all regular buyers of Frozen Desserts/ Ice Cream in the UK (N=600)



All segments engage with Frozen Desserts/ Ice Cream, but Frozen Embracers are highest relative to overall share in the market.

Recent NPD launches worldwide within frozen ice-cream/desserts have focussed on bringing something different, whether it be flavours or format they're changing it up.

Where? US

What do they offer? Malai, figuratively meaning cream of the crop, draws inspiration from South Asian ingredients, aromatic spices, and the founder's upbringing. The ice cream is all eggless, handcrafted, and churned with very little air, resulting in purer, more robust flavors, as well as the creamiest textures you can find.

Where? UK

What do they offer? Slow churned, fine tuned, small batch gelato and sorbetto. Worthy of the finest restaurants, shops and living rooms in the land.

Where? UK

What do they offer? Little Moons are made of two parts. A deliciously sweet, soft and chewy rice flour dough. This dough is steamed, pounded and gently wrapped around a centre of gelato ice cream, like a soft, snuggly puffer jacket on a cold day.

Source: Mintel

FOCUS ON FROZEN READY MEALS

Among regular buyers (every 2-3 weeks or more)

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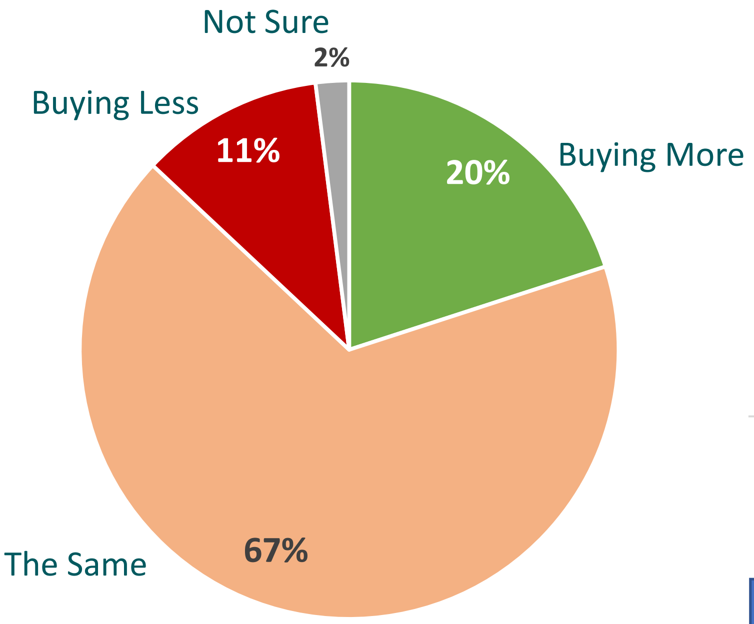
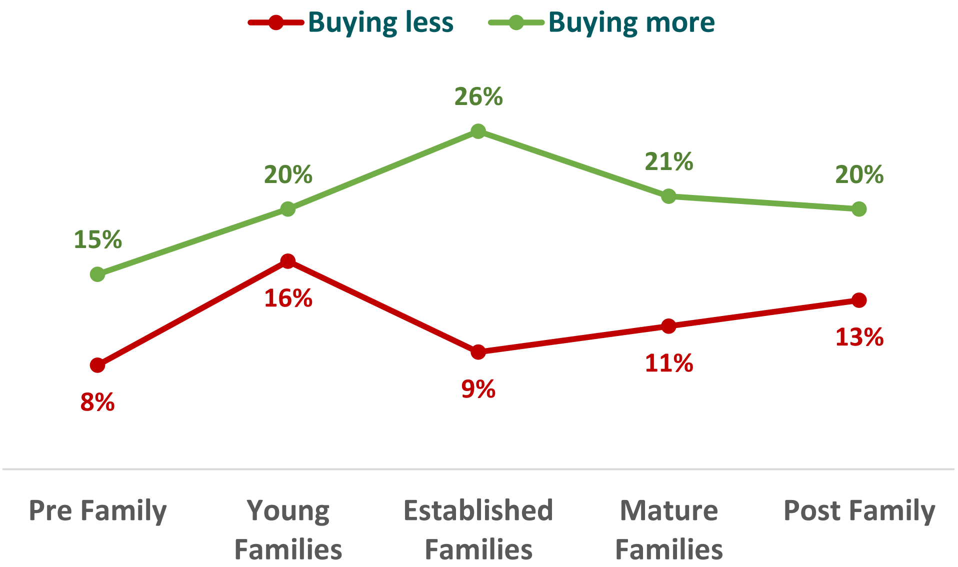
Photo by pmvchamara on Freepik

Frozen Ready Meals: Claimed Purchase Penetration vs. 2 years ago

Source: Opinions 2021, all regular buyers of Frozen Ready Meals in the UK (N=600)





The claim increased penetration appears driven by older family life-stages in particular.

Would you say you are buying less, the same amount or more Frozen Ready Meals compared to 2 years ago?

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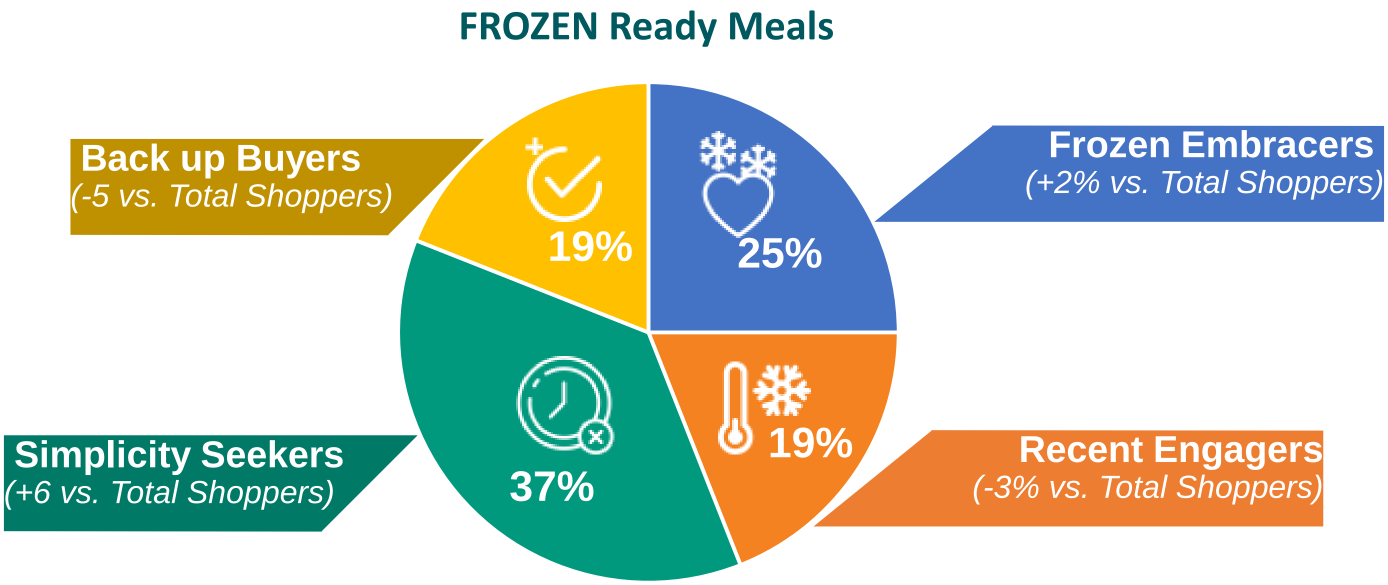
Frozen Ready Meals: Regular Buyer Penetration by Segment

Source: Opinions 2021, all regular buyers of Frozen Ready Meals in the UK (N=600)



"Usually consumers of ready meals are cash rich and time poor." Frozen Food Report 2021

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Recent NPD launches worldwide within frozen ready meals have focussed on their sustainability through plant based and local ingredients as well as convenience.

Where? Australia

What do they offer? Community Co claim to have developed "a range of great quality products at great prices that gives back." Not only do they sell family-sized frozen meals at a reasonable price, made with local ingredients, they also give back to local communities.

Iceland Partner with Livekindly

Where? The UK

What do they offer? Iceland has partnered up with LivelyKindly to significantly expand their frozenplant based offering to consumers in the UK.

Where? The US

What do they offer? Albertsons Companies US introduced flash-frozen skillet meals that can be made in one pan in a matter of minutes. Made with natural ingredients and are nitro flash-frozen with enrobing technology. The one-pan skillet meals release sauce as they cook, so that no defrosting is required.

Source: Mintel

So what do we see?

There is much more detail within each of the sub category sections that examines shopper behaviour, key influence on choice, type and brand purchase penetration, occasion fit and recent NPD launches.

We now switch the focus to the future… to evaluate the potential of a series of innovation platforms for development and identify the areas with greatest consumer engagement.

Source: Freepix

Identifying Future Innovation Territories for Frozen in the UK market…

The Frozen Futures Framework

- Though all initial phases of this project (including consultation with both industry and trend experts), **n=4 key opportunity spaces** for new product development have been identified *(our frozen futures)*.

- These futures were then **tested qualitatively with consumer councils** to further validate and refine each.

- While applicable to the wider frozen category, the futures were engineered into concepts for each of the sub categories of interest in this project and then tested quantitatively among a large sample of UK frozen buyers to gauge their appeal and potential.

We now outline the Frozen Futures Framework…

Photo by Sharon McCutcheon on Pexels

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The Frozen Futures Framework

The Frozen Framework focuses on **four key spaces** that frozen food products can tap into in order to engage with consumers wants and needs.

These spaces highlight **individual benefits** associated with frozen food aiming to convince consumers that they are **making the right choice** by choosing frozen.

Better Than You Think

Photo by Freepik

The **Better Than You Think** space focuses on three sub categories, Premium Indulgence, Collaboration and Exotic Explored.

Better Than You Think highlights the **premiumisation** of the frozen food category, focusing on **quality** and **experience**.

Surprising Value

Better **Than You Think**

Premium Indulgence

Collaboration

Exotic Explored

Permissible Pleasure

High quality frozen food offerings premium e.g COOK

Collaborations with well known chefs/brands to endorse quality

Exotic explored looks to bring frozen food up to speed with consumers changing tastes

THE Better Than You Think FUTURES

Exotic Ice Cream

A luxurious ice-cream made using the **finest ingredients**. Perfect for a special night in

Pastry Pockets

These pastry pockets are ideal for a **convenience meal** or a lunch on the go. Made using **Britain's best ingredients**

Premium Paella

Making your night in for two a **special treat**. This paella uses **high quality ingredients** making it **a premium offering**

Quacking Spring Rolls

These **organic spring rolls** will bring a taste of Asia straight into your home. Each ingredient is **carefully selected** to bring you the highest quality dish.

Optimum Pizza

A delicious range of stone baked **gourmet pizzas**. Each organic ingredient is frozen straight from fresh so all that **nutritional goodness** remains locked in

NOTE: While these expressions of this Future are tethered to specific frozen sub categories, they are meant as a proxy to guide as to whether the ‘Better than you think’ territory can engage shoppers.

Better For You aims to remove the assumption that frozen food is an unhealthy option

It focuses on offering nutrition, systems and transparency within frozen food to prove that you can choose frozen without the guilt

Better
For You

Permissible Pleasure

Nutritional

System

Cut the Crap

Natural Goodness

Highly nutritious frozen options

Focusing on **healthy meals** within frozen food particularly within frozen ready meals e.g Slimming World

Provide **visibility of the ingredients** that are going into the frozen food being offered, e.g. free from

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THE Better For You FUTURES

Vegan Ready Meal

This **vegan meal** you with a quick and easy lunch that helps support your **beneficial gut bacteria**, while also tasting delicious

Superfood Pizza

Introducing our new **Superfood Pizza** so that pizzas can become part of your everyday, **without the guilt**

Superfood Sorbet

These single portion pots offer you a mid day snack that's full of all the right stuff so that you can enjoy an **indulgent treat that's good for you**

Date Brownies

These Date Brownies mean you can enjoy your very own **gluten and dairy free dessert** in the comfort of your home

Morning Muffins

Combing your favourite **superfood seeds** mixed in with immune boosting berries, these morning muffins are a quick and easy way to **start your day off on the right foot**

Photo by Freepix

NOTE: While these expressions of this Future are tethered to specific frozen sub categories, they are meant as a proxy to guide as to whether the 'Better for you' territory can engage shoppers.

Photo by Freepix

Better For the World focuses on pushing sustainability and in turn making frozen food a environmentally positive purchase.

The three sub categories within this are around waste, plant based products and being pro planet.

Flexible Friend

Better **For The World**

Natural Goodness

Waste

Plant - Based

Pro Planet

Pushing **sustainability message** around longer shelf life and less waste

Innovate within plant based products

Recyclable packaging will be expected and minimal plastic desired

THE Better For the World FUTURES

Planet Pizza

These dairy and meat free pizzas are packed with **locally sourced, organic ingredients** making the most of what Britain has to offer. Our pizza's come wrapped in rice paper and are packaged in a **fully recyclable box**

Plant Based Stew

Our plant based stew is packaged in a **fully biodegradable box** and consists of **locally sourced ingredients**, so while this dish is better for you it's also **better for the planet**

Photo by Freepix

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NOTE: While these expressions of this Future are tethered to specific frozen sub categories, they are meant as a proxy to guide as to whether the 'Better for the world' territory can engage shoppers.

Better **Choice**

Photo by Freepix

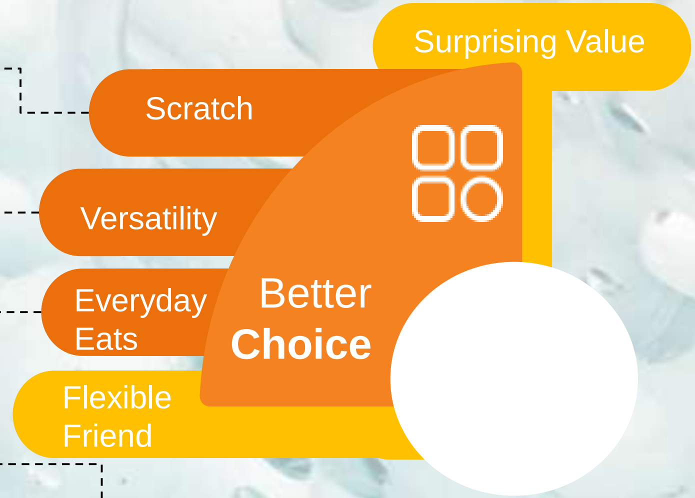
Better Choice focuses on pushing boundaries within frozen food through offering scratch cooking options, more versatility and everyday eats.

Better Choice looks at offering a wider variety of creative options within the frozen space while also remaining convenient and hassle free

Offer **scratch cooking** through providing co creation frozen foods

Provide **versatility** within frozen food offerings and break boundaries

Offer **bite size**, snack options for consumers.



THE Better Choice FUTURES

Create Your Own

Mix and match your favourite toppings. Offering you a variety of toppings and doughs to **cater for everyone**, whether it be a vegetarian, gluten or dairy free night, we've got you covered

Almost Ready Chicken Stir Fry

Each element of our chicken stir fry is **separated out so that you have control** over what to keep in and what to leave out

Dessert Selection Boxes

Each box serves two people and is **carefully selected** to make up the perfect dessert combination. There is a **variety of combinations** available as well offering gluten free, dairy free and vegan boxes

Photo by Freepix

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NOTE: While these expressions of this Future are tethered to specific frozen sub categories, they are meant as a proxy to guide as to whether the 'Better choice' territory can engage shoppers.

The Futures by Frozen Category

	Better For You	Better Than You Think	Better For The World	Better Choice
FROZEN PIZZA	1. Superfoods Pizza	1. Optimum Pizza	1. Planet Pizza	1. Create your own Pizza
FROZEN BAKERY	1. Morning Muffins	1. Pastry Pockets		
FROZEN DESSERTS/ ICE-CREAM	1. Superfood Sorbet 2. Date Brownies	1. Exotic Ice Cream		1. Dessert Selection Boxes
FROZEN READY MEALS	1. Vegan lunch	1. Premium Paella 2. Quacking Spring Rolls	1. Plant Based Stew	1. Almost Ready Chicken Stir Fry

Evaluating the Futures

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Each of the n=15 ‘Futures’ were evaluated in the survey to identify the optimal performance territories for development within. They were evaluated against the following key metrics to indicate greatest opportunity:

- **Belief;** *that they will become a reality*
- **Consumer Connection;** *that they will become a popular choice*
- **Desire;** *at a personal consumer level; a product for me*

A summary of these findings are provided here…

Futures Mapping: All Regular Frozen Buyers

DESIRE – *"I WILL BUY IT"* (+ / -)

CONSUMER CONNECTION – *"IT WILL HAPPEN"* (- / +)

Build It

Above norm on likelihood to buy BUT below norm belief that it will happen

HAVE TO BUILD IT!

Safe Bets

Above norm on likelihood to buy AND belief that it will happen

A SAFE BET!

Plodders

Below norm on likelihood to buy AND belief that it will happen

A GAMBLE!

Next Niche

Below norm on likelihood to buy BUT above norm belief that it will happen

NOT YET – BUT IN THE FUTURE!

BELIEF
"IT WILL BE BIG"

Higher

Lower

BETTER FOR YOU

BETTER THAN YOU THINK

BETTER FOR THE WORLD

BETTER CHOICE

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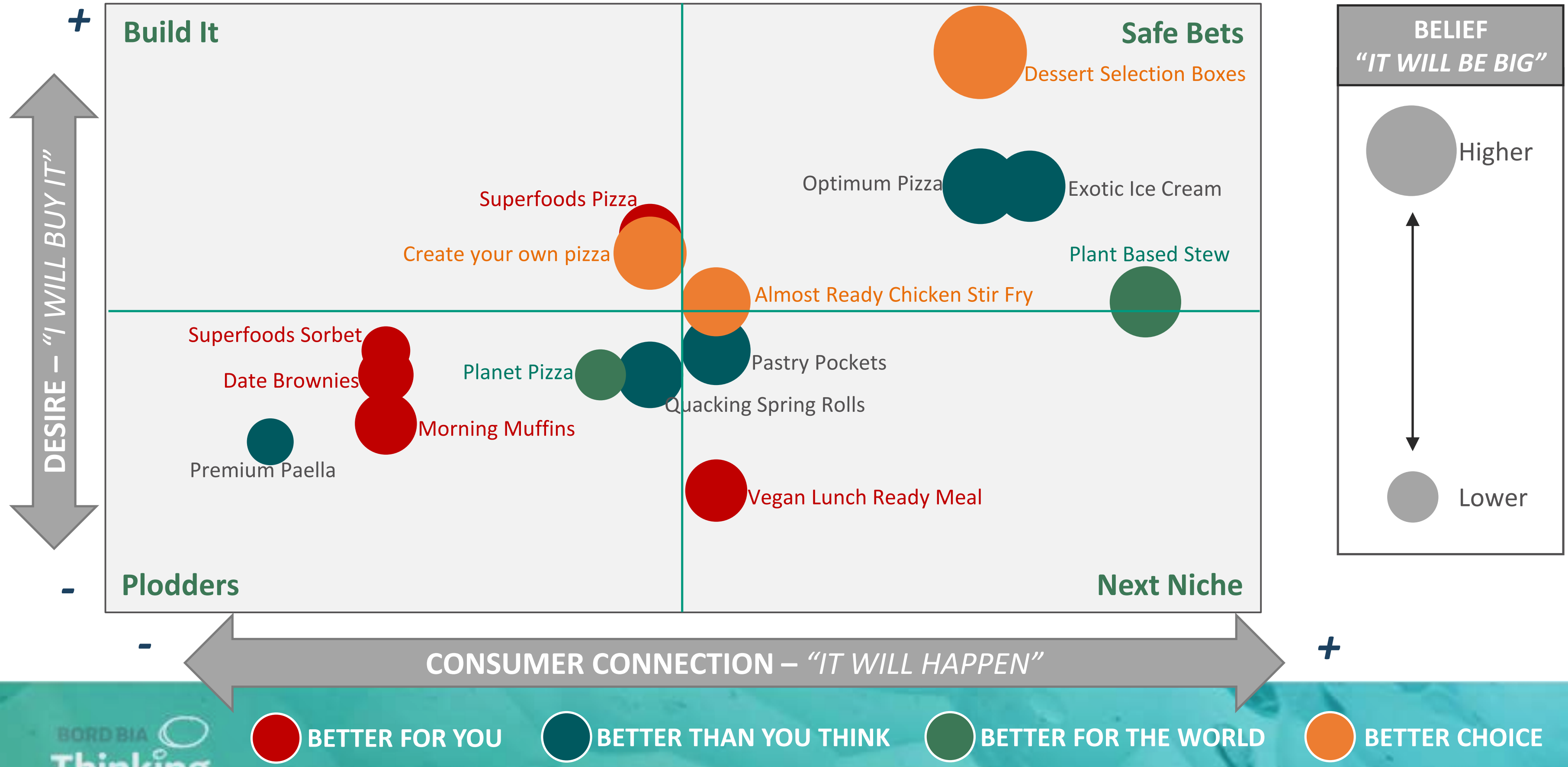
Futures Mapping: All Regular Frozen Buyers



Optimal Development Territories – Total Frozen

MOST COMPELLING

“Willingness to explore”
“Enhancing value for money”

Better Than You Think — Dialling up the premiumisation of offerings and giving shoppers something different, compelling and exotic

“Willingness to explore”
“Enhancing value for money”

Better Choice — Leveraging the co-creation ability of frozen food to make shoppers more involved in something special

“More engaging convenience”

Better For The World — Getting plant based seen as tasty and indulgent with the promise of re-cyclable materials

“Accommodating the needs of the new generation”

Better For You — Healthy infusions to tasty products with the influence of ‘Superfoods’ evident

“Enhancing value for money”

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Optimal Development Territories by Segment

Frozen Embracers

OPTIMAL FUTURES

Better Choice

Better Than You Think

KEY CONCEPTS

FOCUS AREAS

Tapping into the premium and exotic space along with engaging co-creation opportunities are clearly the most compelling future territories to drive interest among this segment.

Recent Engagers

OPTIMAL FUTURES

Better Choice

Better Than You Think

Better For The World

Better For You

KEY CONCEPTS

FOCUS AREAS

Unsurprising a wide range of interests among the recently engaged segment, driven by new and interesting products as well as healthier options.

Optimal Development Territories by Segment

Simplicity Seekers

OPTIMAL FUTURES

Better Than You Think

Better Choice

Better For The World

KEY CONCEPTS


Dessert Selection Boxes


Premium Paella


Optimum Pizza


Plant Based Stew

FOCUS AREAS

Enhanced premiumisation and unique offers most compelling while plant based opportunity also evident. Co-creation in the form of desserts (treat based) also engages.

Back Up Buyers

OPTIMAL FUTURES

Better Than You Think

Better Choice

KEY CONCEPTS


Exotic Ice Cream


Optimum Pizza


Create Your Own

FOCUS AREAS

Back up buyers engage best with more premium/ exotic offerings that dial up quality and taste. The “create your own” futures can help overcome trust barriers that exist.

Key Takeaways

Reassurance around 'freshness of frozen' is important to this market and messaging that dials up this benefit *(e.g. how quickly food was frozen)* will be compelling

Frozen will play a **significant role in encouraging trial of new and interesting foods** for UK consumers – widely viewed as more 'risk averse' than fresh.

Frozen products that accommodate **greater 'co-creation' in a convenient way** has strong potential to engage the 'time poor' shoppers and better convince sceptics of the great taste, quality and nutritional credentials frozen offers.

N=4 distinct types of frozen shopper exist in the UK market – each with specific needs and clear opportunities to attract across a range of sub categories via focussed NPD.

Optimal NPD via **premiumisation of offerings** with unique and exotic taste credentials and by offering **more engaging convenience based solutions** for meals.

Sustainability benefits will be important to attract the new generation of frozen shopper via indulgent plant-based solutions and the promise of recyclable and sustainable materials in packaging terms.

Source: Freepix

Futures-led Innovation Toolkit

This toolkit is provided to support you in working through this Futures Playbook and to facilitate the capturing of insight and inspiration from this materials.

Following this **8 step innovation journey** will ensure that your solutions are insight-led and connected to consumer needs.

It will also help you to deliver clarity and focus so that you can present your case and proposition more effectively to your commercial partners and stakeholders.

It is designed to be used alone or to help you to facilitate group based innovation.

Thank You!

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