The Thinking House

BORD BIA INSIGHT CENTRE

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?



▲ Consumers still want food to be convenient, but their desire to eat healthy poses a problem for the huge multinationals known as Big Food. Photograph: Jochen Tack/Alamy

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: todays perceptions

Lets go shopping: the who, what, why

Understanding the new shopper: the dieticians view

Instore immersion & packaging

Opportunities to Drive Purchase – the new rules..

Consumer Lifestyle Trends snapshot

Building frozen futures

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Methodology and approach

Qualitative Approach

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

	Gender	Age/life stage	Social class	Shop target	Location
1	Mixed	20-35 Pre-nester No kids 	BC1	SuperValu	Dublin
2	Female	35-44 years Young family (kids 0-12 years) 	C1C2	Aldi/Lidl	Dublin
3	Female	45-54 years Mature family (kids 13-18 years) 	BC1	Dunnes/Tesco	Dublin
4	Female	45-54 years Mixed Family (kids 8-18 years) 	C2D	Iceland (in repertoire)	Dublin

4 x accompanied shopping sessions

1 x expert interview (dietician)

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

Quantitative methodology



820

grocery shoppers were interviewed.

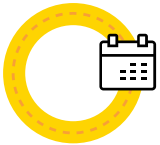


Interviewing was conducted via B&A's online panel

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**

Additional sources from the Thinking House



Google

NewNutrition Business

MINTEL

IGD

GlobalData.

The Grocer

Consumer LIFESTYLE TRENDS

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Frozen dynamics

Todays perceptions

The L “*a*”st Aisle

It’s off the radar for half of grocery shoppers



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Currently the over riding perception is that its an aisle of convenience YET predominantly unhealthy..a throw back to its original raison d'etre..easy convenience

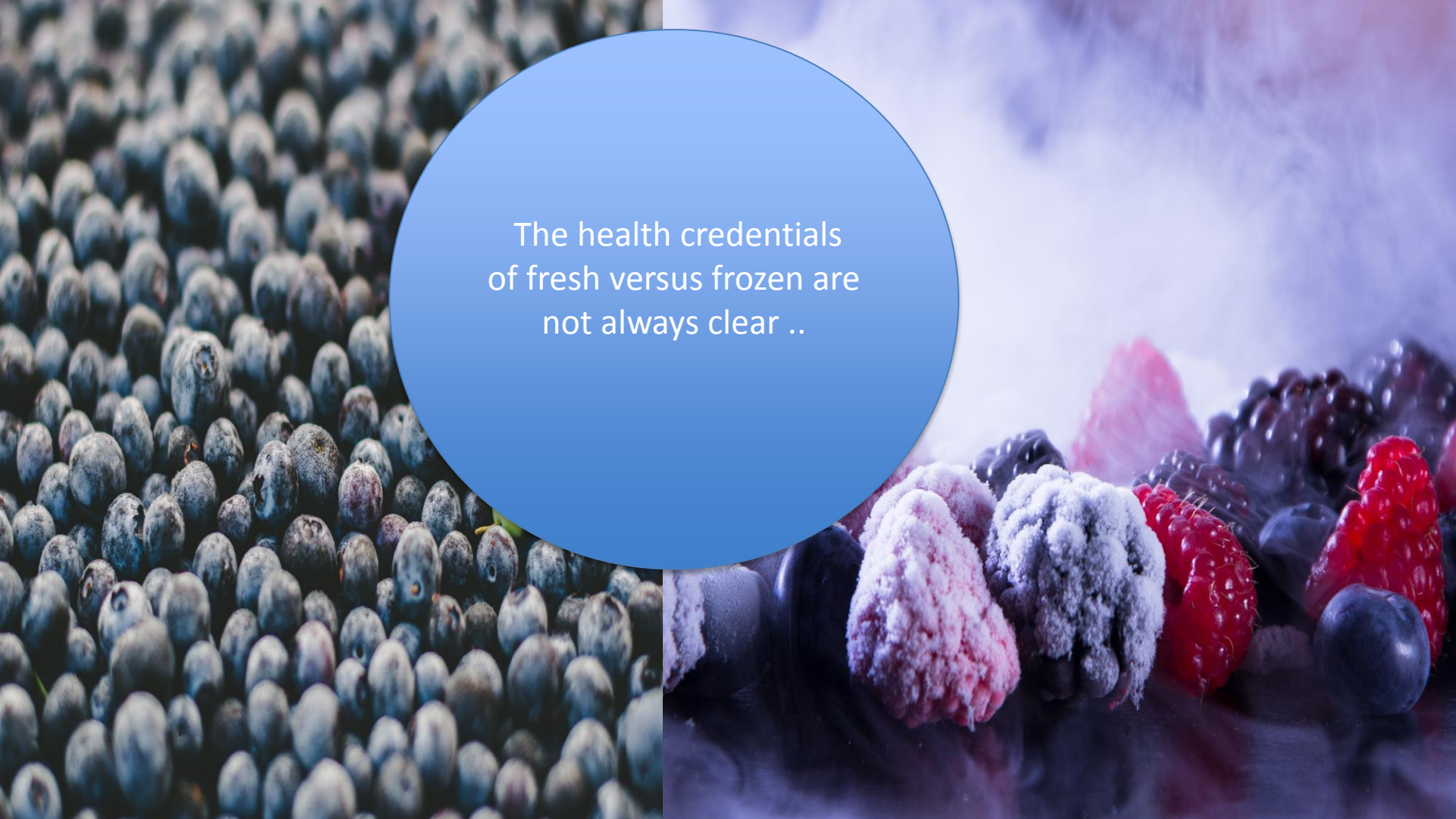


WORD CLOUD SPONTANEOUS ASSOCIATIONS ROUTED IN CONVENIENCE

Base: All grocery shoppers 820



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


The health credentials
of fresh versus frozen are
not always clear ..

Word Cloud: Words/phrases about frozen food that spring to mind spontaneously

	Total	Gender		Age				Class Grouped		Region				Area		Frozen Food Purchasers		Kids in HH	
		Male	Female	18-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	RoL	Munster	Conn/Uls	Urban	Rural	Weekly	Monthly	Kids in HH	No Children under 18
	820	276	544	176	276	271	77	378	442	240	199	230	151	613	207	410	752	326	494
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
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
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			
Chips/Oven fries/Potato/Wedges/Sweet potato	9	11	8	7	10	9	10	10	8	9	6	11	9	9	9				
Pizza (Goodfellas/Dr Oekter mentioned)	9	10	8	10	10	7	4	9	9	10	9	8	10	9					
Quick/Fast/Speedy	8	5	10	10	9	7	5	7	9	9	10	7	8	9					
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							9
Cold/Freezer/Frozen	7	7	7	8	7	7	4	6	8	9	7							8	6
Unhealthy/Comfort food/Junk/Rubbish	7	6	8	15	7	2	3	9	6	14							7	8	7
Fish –fillets, fingers, prawns, pies,	7	10	5	5	5	9	10	6	7							6	7	6	7
Nutritious/Healthy (good food)	4	2	5	2	2	7	4	5							3	4	4	2	5
Processed/Additives	4	3	4	8	3	2	2							4	4	3	3	4	4
Iceland	3	3	3	2	5	3							2	3	3	4	3	3	3
Chicken – burgers, nuggets, goujons,	3	3	2	2	2							2	4	3	3	3	3	2	3
Meat/Beef/Burgers	3	3	3	4							3	4	2	4	2	5	4	6	2
Tasty/Delicious	3	3	2							0	4	4	1	1	5	3	3	2	3
Green Isle	2	0							3	0	2	2	4	2	2	2	2	1	2
Good variety/Range/Selection	2							3	2	2	4	2	2	2	3	3	3	2	3
Inferior/Poor quality							2	4	0	-	3	2	4	1	3	1	2	2	2
Don't buy frozen/Avoid/Not for me						3	4	1	3	3	1	1	3	2	2	1	1	0	3
Not fresh (preservatives)					2	0	5	1	3	3	2	3	-	2	1	1	2	3	2
Findus				-	1	2	1	2	1	1	3	1	-	2	0	1	1	1	1
McCain			1	-	-	1	2	0	1	0	1	0	1	0	1	1	1	0	1
Donegal Catch		1	1	-	1	1	8	0	2	-	1	1	3	1	2	1	1	1	2
Other	11	14	10	12	11	10	12	13	10	12	9	12	12	10	13	10	11	10	12
Nothing	2	3	2	1	3	3	4	2	3	0	3	4	2	2	3	1	2	2	3

Health is not highly scored

58% believe frozen does not taste as good as fresh



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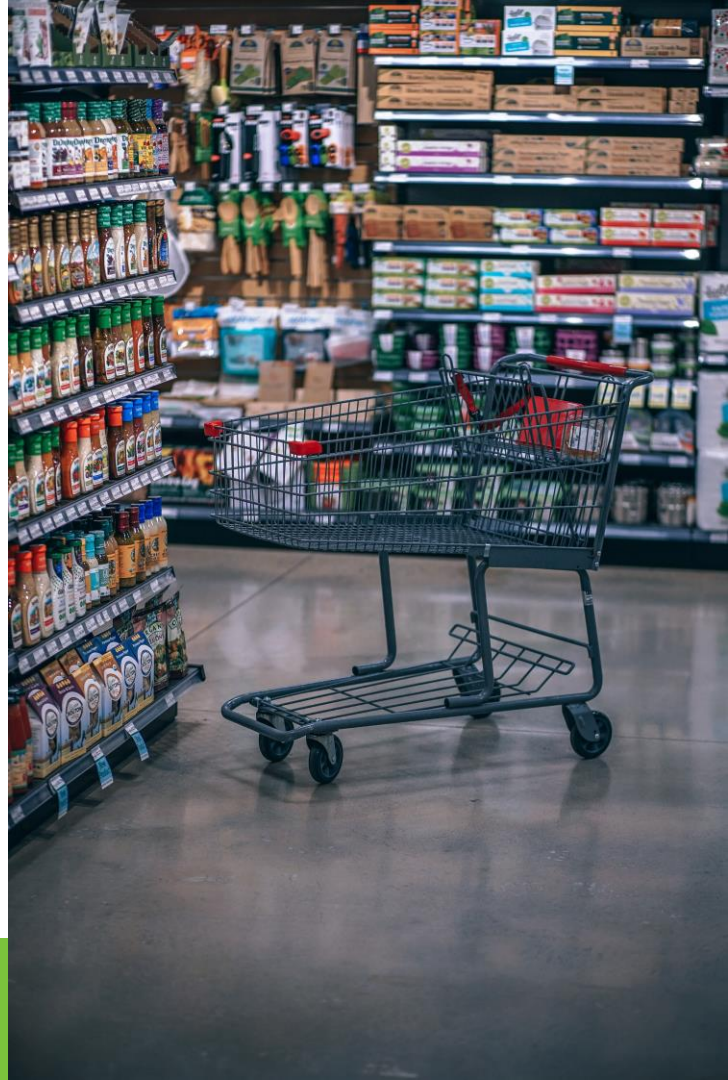
A third of people say that they only really buy it sometimes..and that they can take it or leave it



It’s relevance is being more challenged in todays 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”



The dietitician experience

Bord Bia
Irish Food Board


What role can frozen play?

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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%



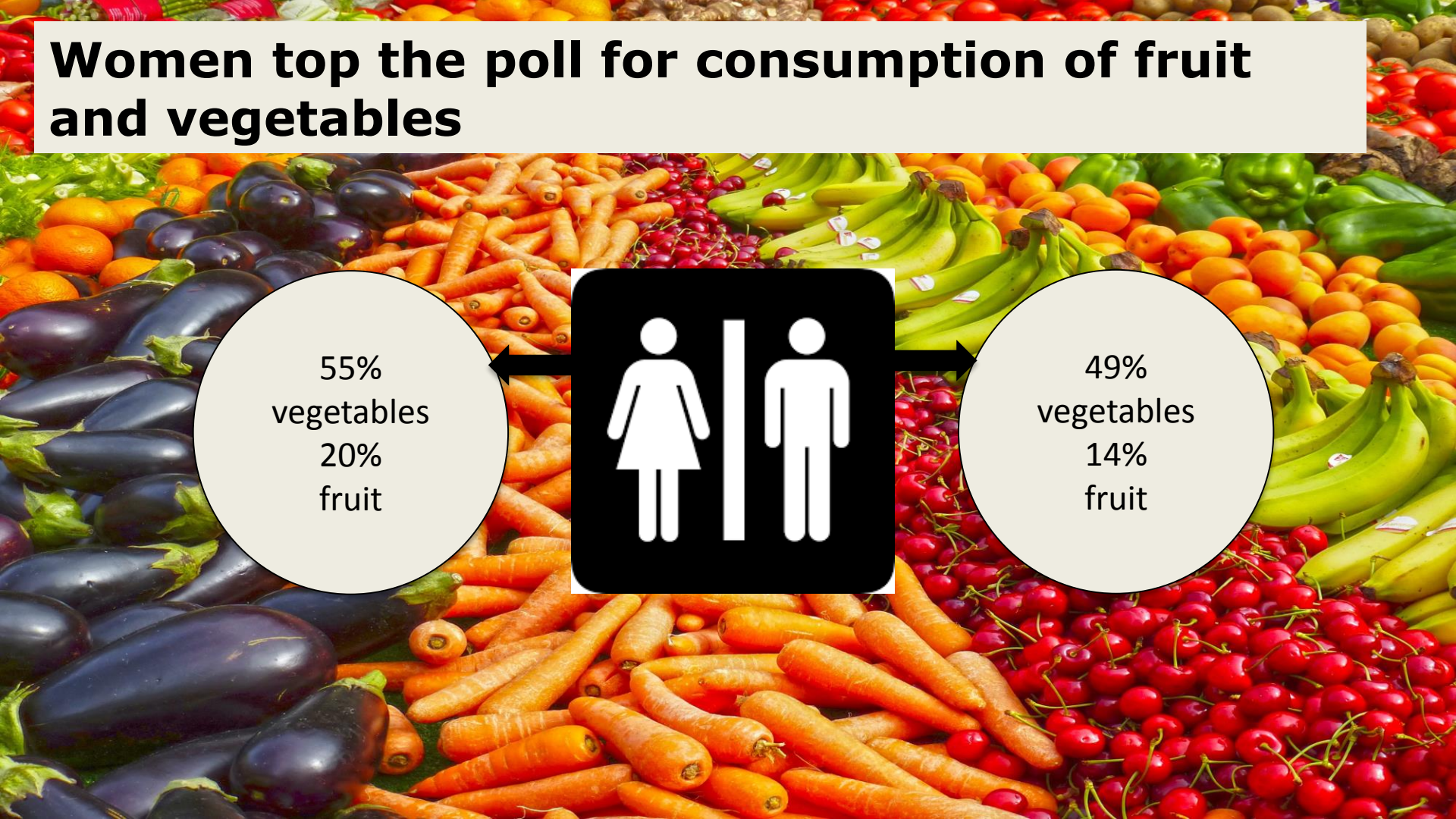
Frozen ready meals
9%



Frozen party food
(cocktail sausages/ samosas/ vol-au-vents, etc)
5%

Frozen meat is consumed by 3 in 10 weekly or more

Women top the poll for consumption of fruit and vegetables



Interesting and emerging uses..



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)

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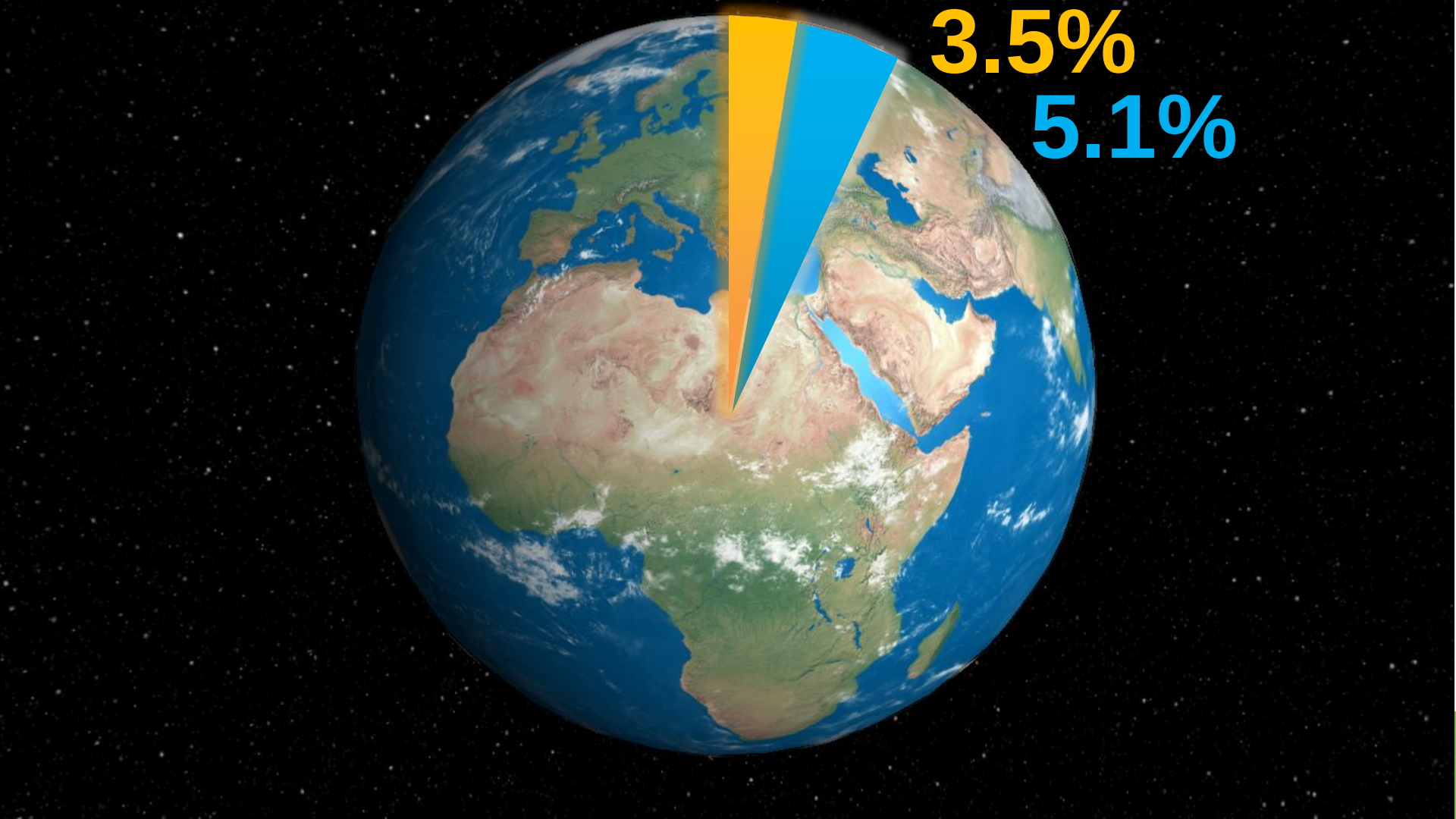
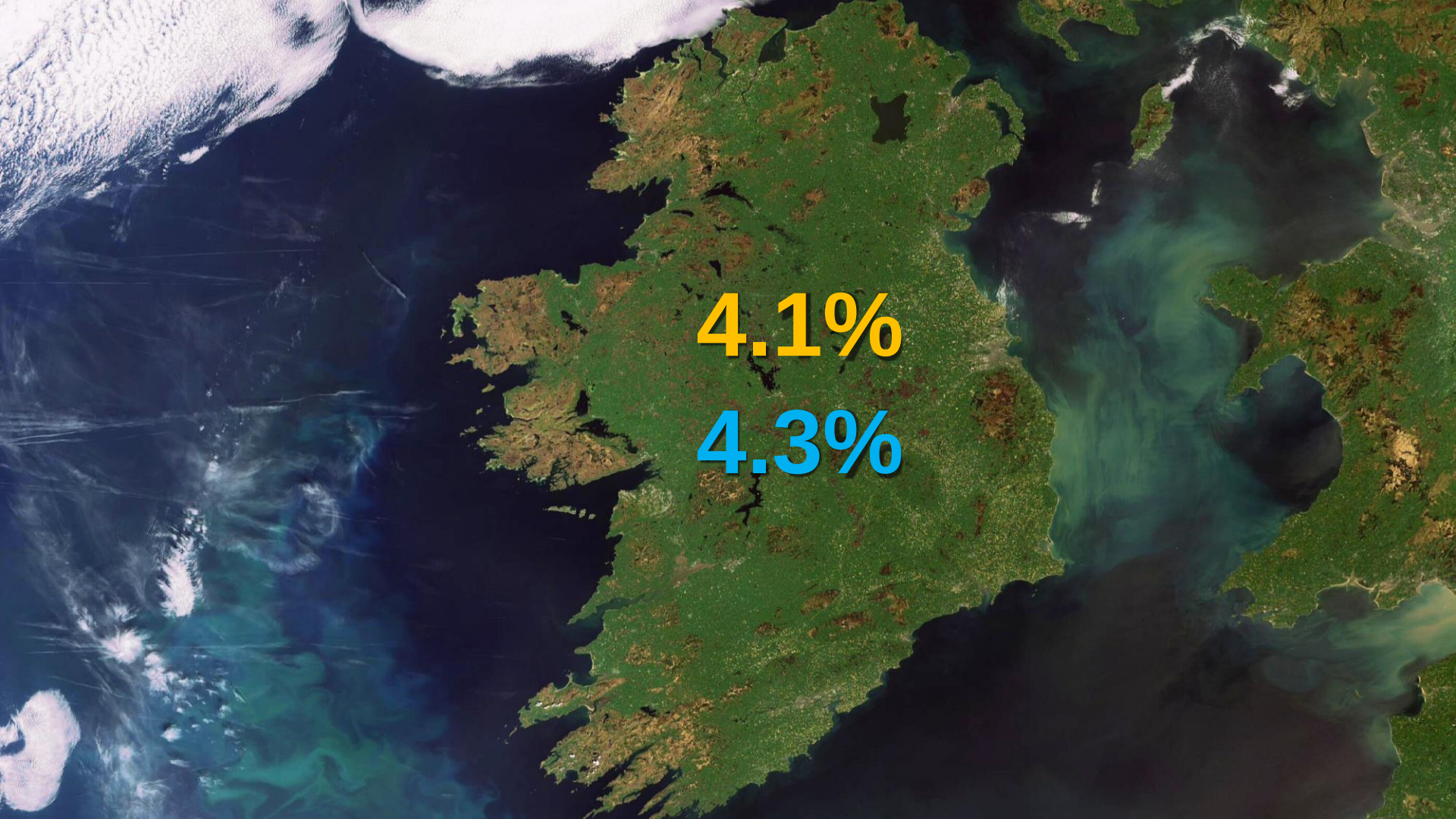
Understanding this shopper some more


General Healthier Eating
Fuelled By social media
Beef and Dairy Struggle
New emerging categories
Providing new alternatives
Vegetarianism & Veganism
Push factor for frozen
Authentic Consumption
DIET PLAN
The dietitian experience


3.5%
5.1%


4.1%
4.3%


63% of vegans stated that food choices are a big part of their identity



Ye didn’t leave the hot water on, did you?


Beautyrobics

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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

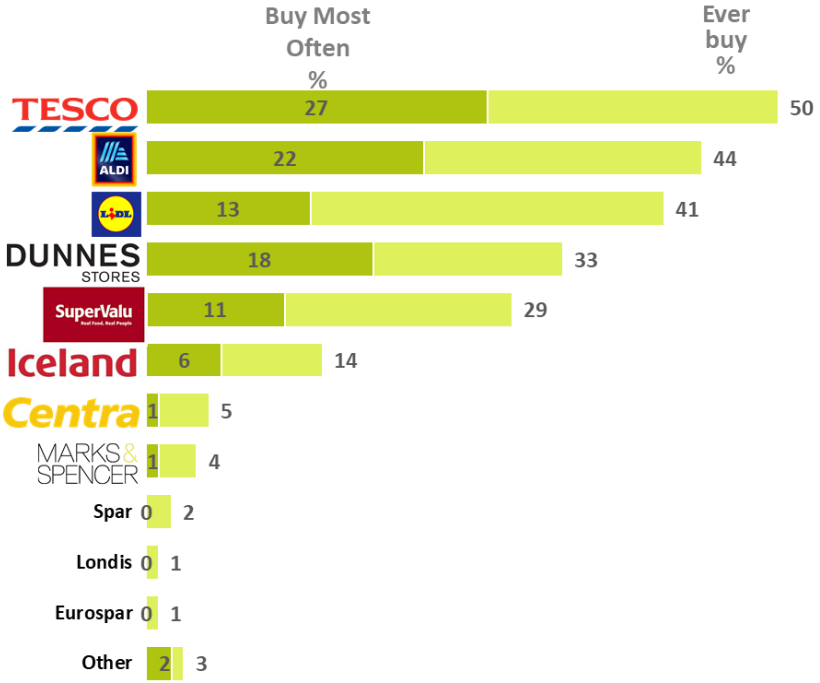
72% agree that its easy to see the special offers and prices of different products in the frozen section and more than half switch brands or products based on these offers




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!

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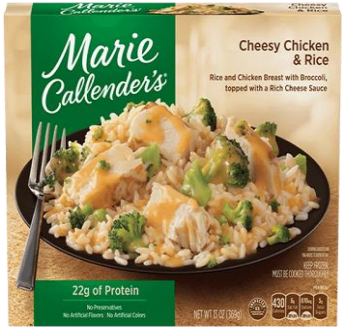
Shopping..
Packaging



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.*

> *It looks delicious, and, I suppose, it's telling me that the meat is organic.*

> *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.*



Don’t underestimate the role of packaging format



Malleable packaging “moulds”

Boxes often don’t fit in freezer

Resealable packs also important

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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
@Marry health with convenience

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..

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

@Build health credentials

@Build taste credentials

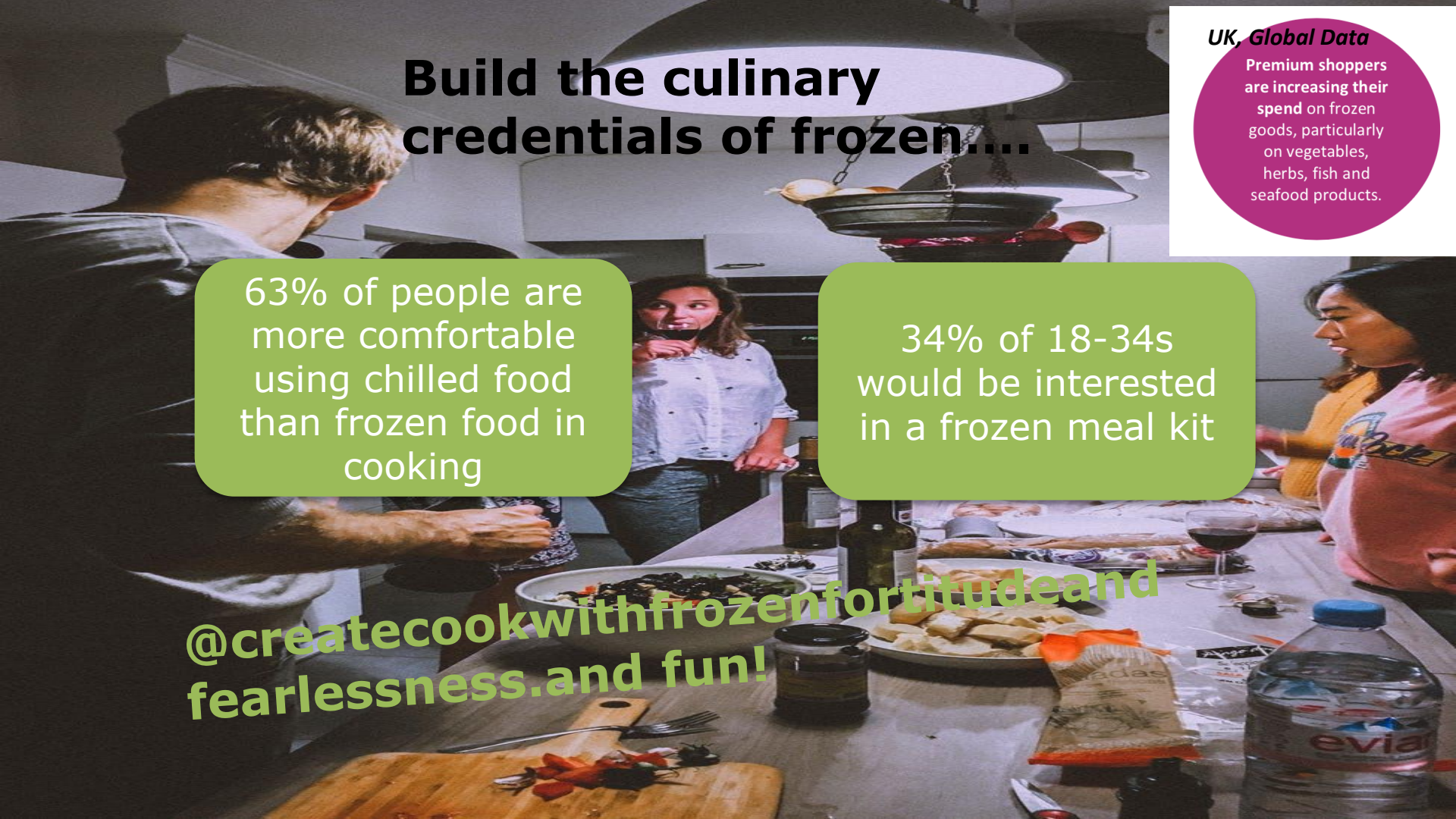
57%
think frozen food does not taste as good as fresh food



6 in 10 have used frozen veg in casseroles, stews, soups

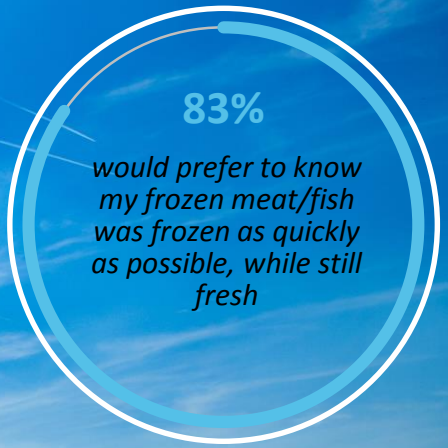
"If I want to buy a fresh banana, I'm using it for I don't know, putting it into porridge. If I'm using frozen banana or frozen fruit, I'm putting it into a smoothie. It's the same with vegetables. If I'm roasting vegetables then I buy fresh but if I'm going to be using it in a soup or a stew or something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

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


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
@createcookwithfrozenfortitudeand fearlessness.and fun!
UK, Global Data
Premium shoppers are increasing their spend on frozen goods, particularly on vegetables, herbs, fish and seafood products.

Provenance is desirable and linking provenance with “speed of freshness”

even better..think Picard

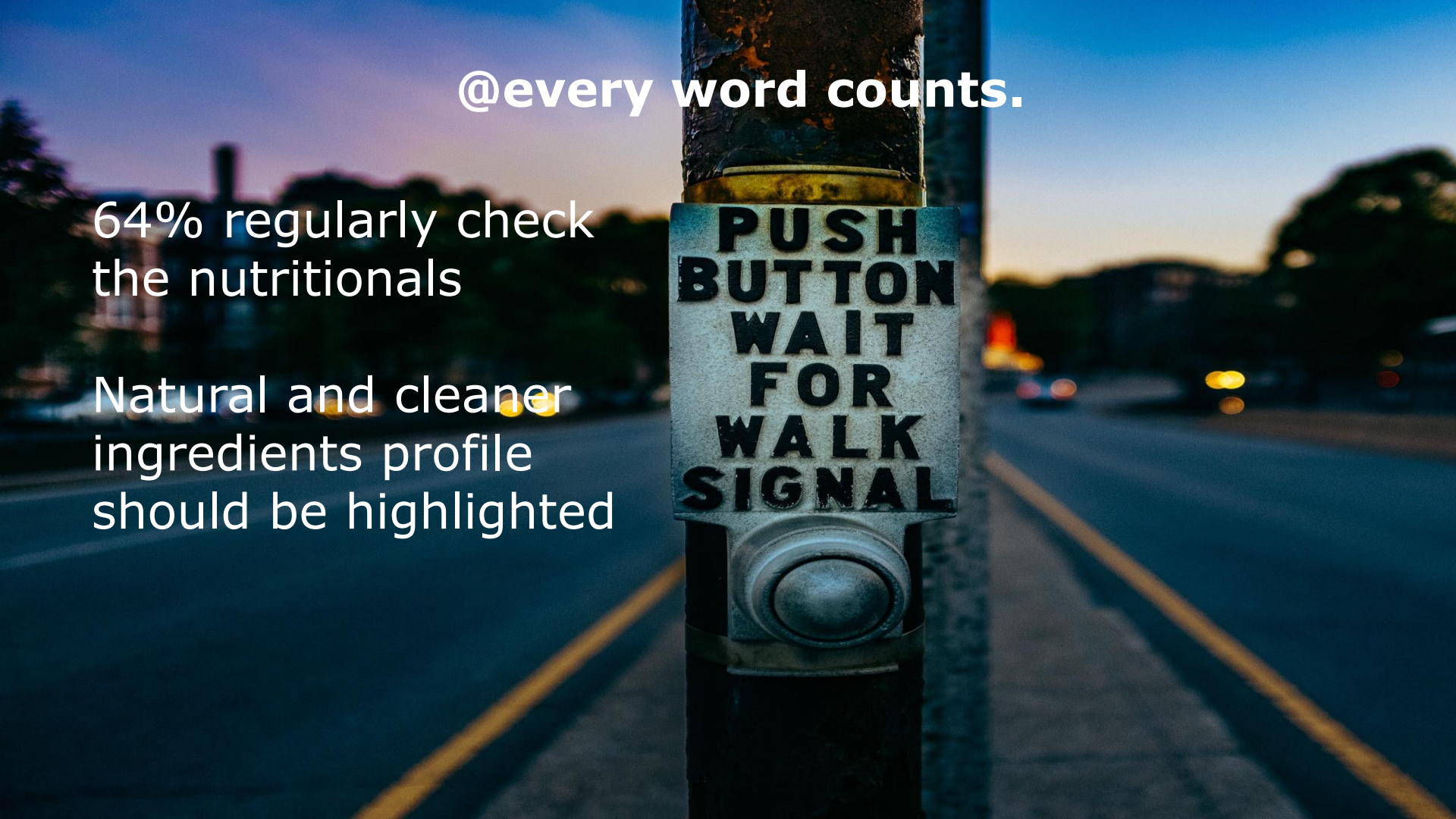


@Build..fast..farm to freezerstories

@every word counts.

64% regularly check the nutritionals

Natural and cleaner ingredients profile should be highlighted





50% of people prepare meals and freeze them for later in the week..

The storage battle

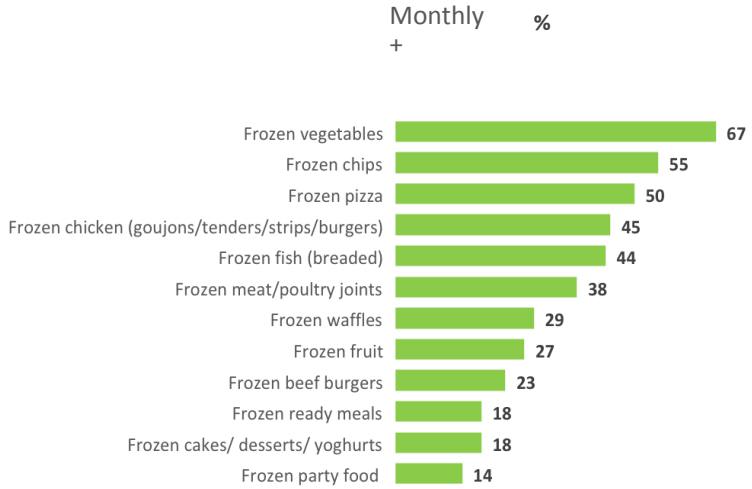
Nearly 6 in 10 say that the lack of freezer space limits the amount of product they can buy!

The creation of smaller packs, refillable packs, malleable packs, meal aides..could all could help here

Bord Bia
Irish Food Board

Its not all about health!!.

Base: All grocery shoppers - 820





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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.

GOOD THINKING Consumer LIFESTYLE TRENDS

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.

ENGAGING Experiences



> **I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others…**


FOOD 35w
Yasss
Story Culture
@naturalbornfeeder oat
crepes


Sensory Experiences
BUTTERFLY EFFECT
BUTTERFLY PEA FLOWER
SMOOTHIES


Peer to peer
ENGAGING
Experiencey


Food Fusions

Consumer LIFESTYLE TRENDS

Responsible LIVING



> **I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living…**

picard

Eco status



Image Source: Tael [CC BY-SA 3.0)
https://creativecommons.org/licenses/by-sa/3.0

Responsible LIVING

Innovating Against Waste



Image Source: Nestle on Flickr
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

HEALTH & Wellbeing



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…

LIVEKINDLY

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

Delivery 2.0



Flexi Food

Fuller LIVES

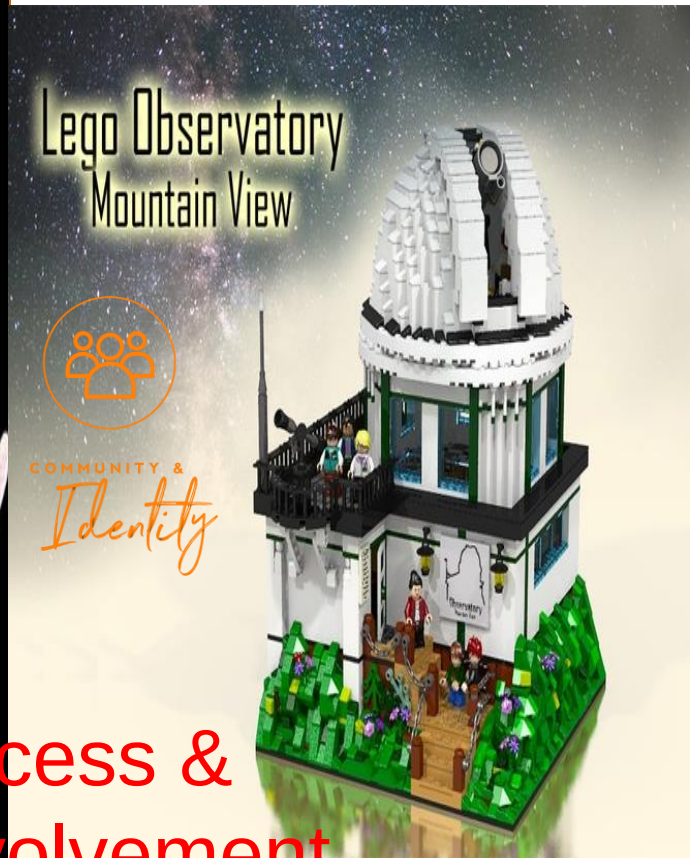

Consumer
LIFESTYLE TRENDS
COMMUNITY &
Identity
“
I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated…



Identity Spectrums



MADE



Access & Involvement

"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"



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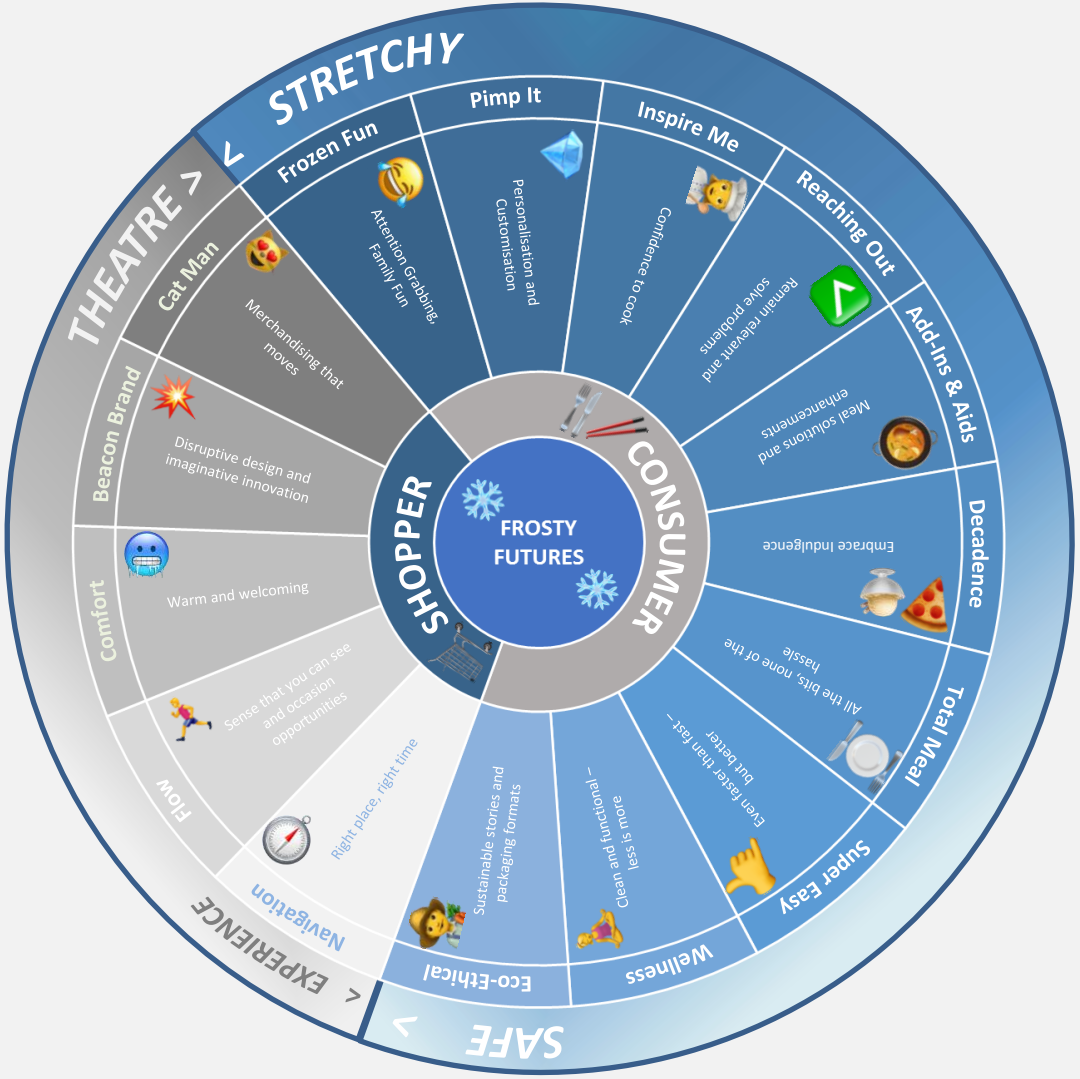
Frozen Futures

FROZEN FUTURES





Consumer

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.









Image source: GNPD

Wellness

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.



Image source: GNPD

Super Easy

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'**







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!







Image source: GNPD

Decadence

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!







Image sources: GNPD and Pexels

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

Reaching Out

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.





Image source: Pexels

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

Pimp It

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!





Image source: Pixabay

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!









Image source: GNPD



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!







Image source: IGD

Navigation

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:

- Buss, D. (2019). Millennial demand brings frozen food in from the cold. *New Nutrition Business*, (March). Retrieved from http://www.new-nutrition.com

- GlobalData. (2018). *Hot Topic: Frozen Food 2018* (p. 3). GlobalData. Retrieved from https://consumer.globaldata.com/HomePage

Image sources:

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