

Grocer Frozen Food

Research in Conjunction with The Grocer

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**The
Grocer**

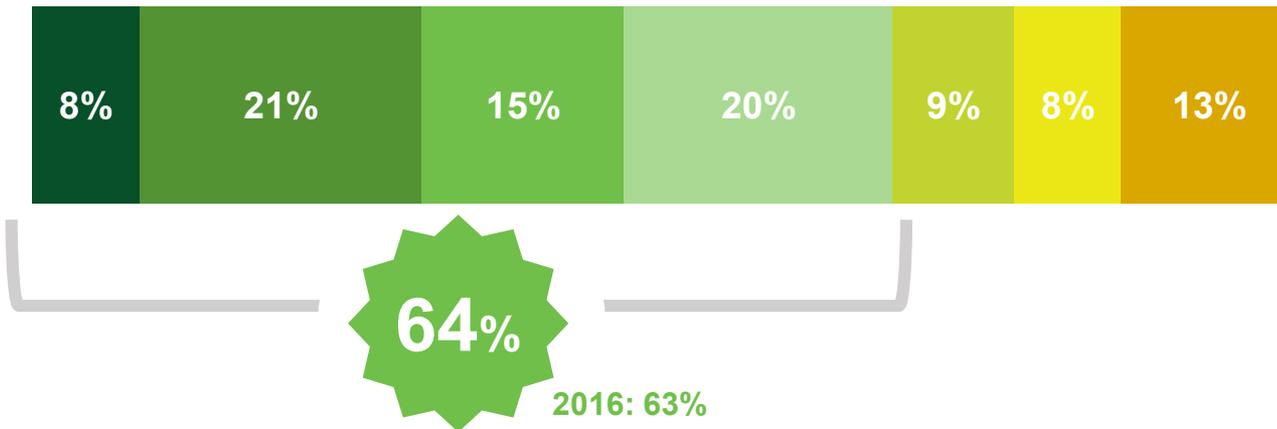


Frequency of Frozen Food Consumption

Two thirds of British adults eat frozen food at least weekly with 8% saying they eat it every day. Men and people in their mid twenties to mid thirties are the most frequent consumers

How often do you eat frozen food as a main meal?

■ Daily ■ Every 2-3 days ■ Every 4-6 days ■ Once week
■ Once every 2 weeks ■ Once a month ■ Less than monthly



 2016: 8%
Never eat frozen food

Eat frozen food at least weekly

- More **men** (67%) than women (60%)
- Highest for **25-34s** (72%) and almost 1 in 6 state they eat frozen meals daily (15%)
- Lowest for the **over 55s** (55%), 1 in 10 never eat frozen food
- People living in the **North East** (72%) and **Wales** (71%) are the most frequent frozen food consumers

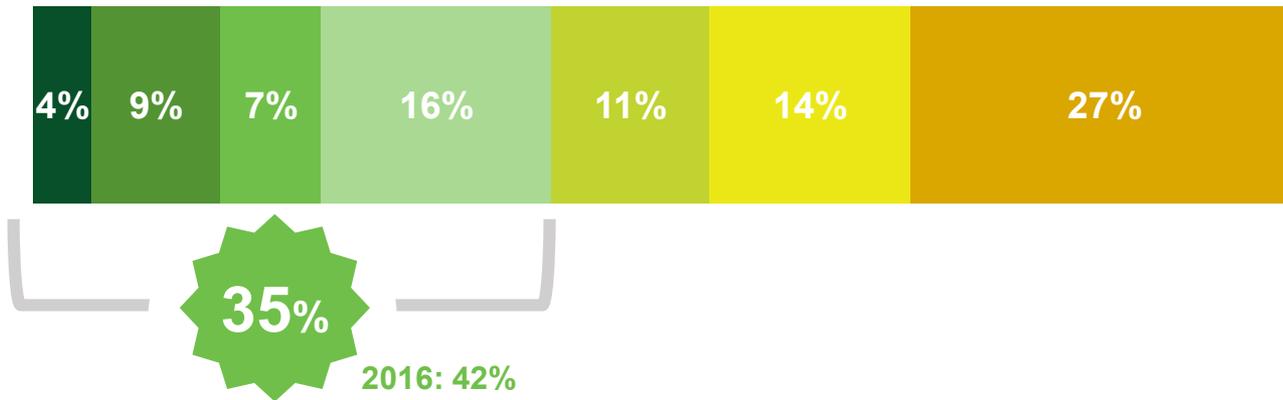


Frequency of Frozen Dessert Consumption

Frozen desserts are a less frequent treat with only a third eating them weekly. As with frozen food overall, men and those in their mid-twenties and thirties are the most frequent consumers

How often do you eat frozen food as a dessert?

- Daily
- Every 2-3 days
- Every 4-6 days
- Once week
- Once every 2 weeks
- Once a month
- Less than monthly



2016: 10%

Never eat frozen dessert

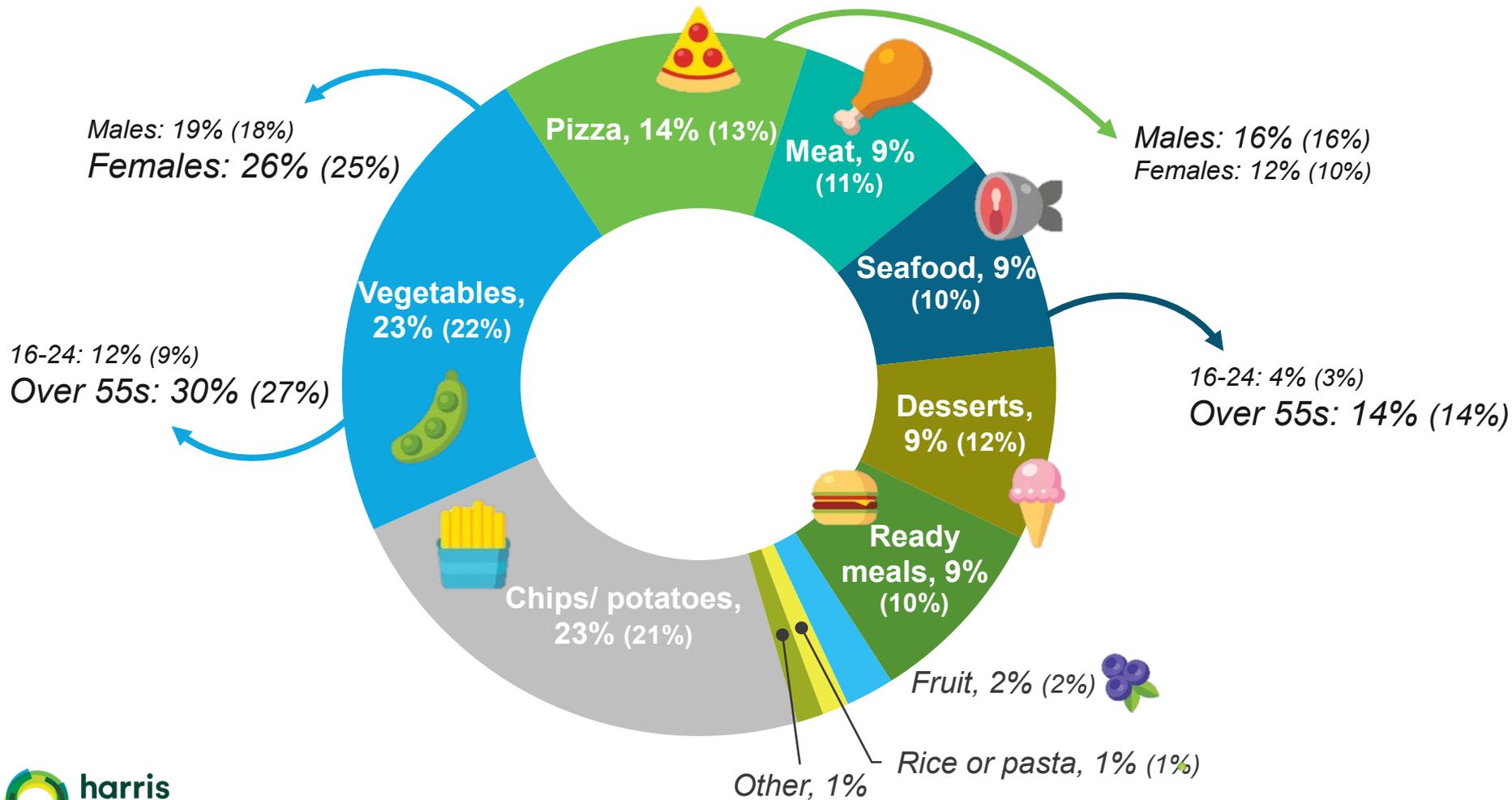
Eat frozen dessert at least weekly

- More **men** (41%) than women (30%)
- Highest for **25-34s** (48%) and 1 in 10 state they eat frozen desserts daily
- Lowest for the **over 55s** (26%), 18% never eat frozen desserts
- People living in the **North East** (48%) and **London** (44%) are the most frequent frozen food consumers

Types of frozen food consumed

Vegetables and chips or potatoes are the most commonly eaten frozen foods, consumption habits have not moved since last year

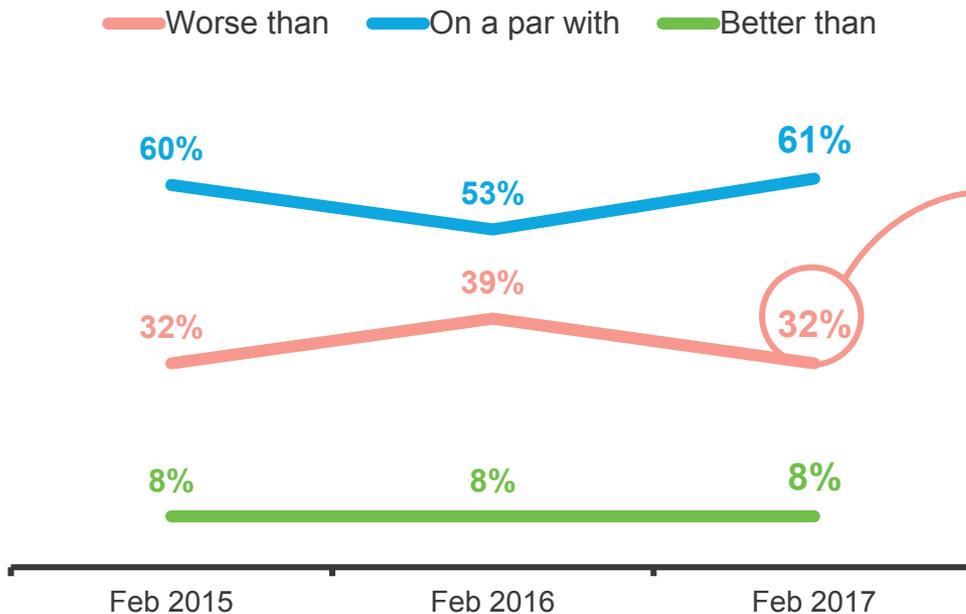
Which type of frozen food do you eat most often?



Perceptions of Frozen Food

In 2017 there has been a recovery of perceptions frozen food, returning to 2015 levels. Negative attitudes are more concentrated among younger consumers

Attitude to frozen food compared with fresh



It is the **youngest** consumers who are most likely to believe frozen is worse: in the **16-24** group more believe it is worse (48%) than on a par (44%).

Moving through the generations, fewer people believe it is worse and more on a par. The proportion believing it is better changes less.

Proportion believing frozen is worse than fresh

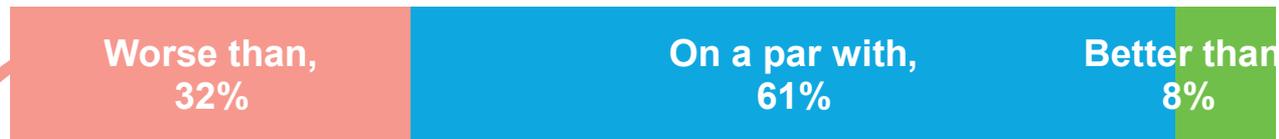
16-24	25-34	35-44	45-54	55+
48%	42%	38%	30%	19%

There is some impact of **social grade** too with 36% of people in AB believing frozen is worse compared to 28% of people in DE.

Reasons For Believing Frozen is Worse Than Fresh

Concerns about freshness have risen as the top reason for people believing frozen food is worse. Younger consumers especially have negative perceptions about the quality and freshness of frozen food

Frozen food is ...



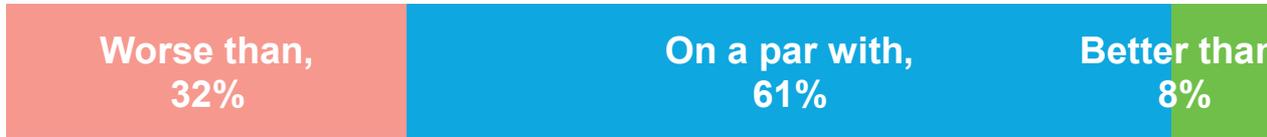
... fresh food

It's not as fresh	33% (22%)	→ Highest for 16-24: 40% and lowest for 45-over 55s: 25%
I tend to just cook from scratch	30% (31%)	
I think it tends to be lower quality food	18% (26%)	→ Highest for 16-24: 26% and lowest for 45-54: 13%
I don't trust the quality of frozen food	10% (9%)	
There's not much choice of products with frozen food	2% (3%)	
There's a lack of decent brands to choose from	2% (2%)	
The food I like to eat isn't available as frozen	2% (3%)	
Frozen food is inconvenient to take home	1% (1%)	
The food is too cheap... I'd be embarrassed to serve it	1% (1%)	
Frozen food is old fashioned	1% (1%)	

Reasons For Believing Frozen is Better Than Fresh

Reasons for preferring frozen differ across the generations: middle-aged consumers believe freezing retains the nutrition whereas convenience is the key driver for younger consumers

Frozen food is ...



... fresh food

Only 6% of 16-24s whereas 59% of 45-55s select this reason



Frozen food is fresher and preserves the food's nutritional value better 33% (32%)

Frozen food lasts longer and avoids wastage 28% (22%)

Frozen food is cheaper 14% (15%)

Frozen food is more convenient 14% (19%)

Frozen food is better quality 10% (12%)

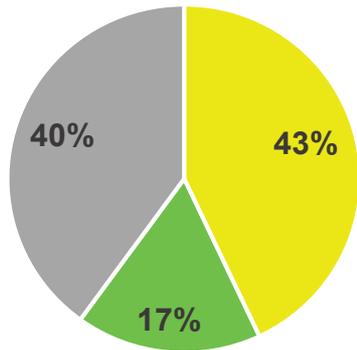
Most given reason for 16-24s (35%), falling to only 4% of 45-55s



Iceland Changing Perceptions?

Iceland's recent campaign has had some impact in changing perceptions of frozen foods, more so amongst younger consumers but less so with Iceland non-shoppers

The **Iceland** 'power of frozen' campaign has:



25% of 25-34 year olds

- Not changed my opinions about frozen food
- Made me reconsider frozen food
- I have not seen it



How shopping habits with Iceland has changed

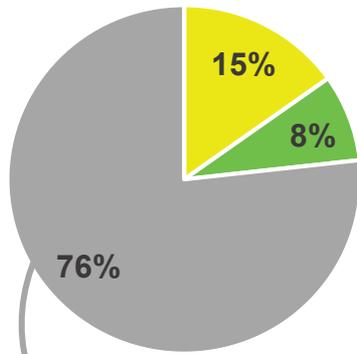


- Less often
- The same
- More often
- Do not shop in Iceland

COOK Changing Perceptions?

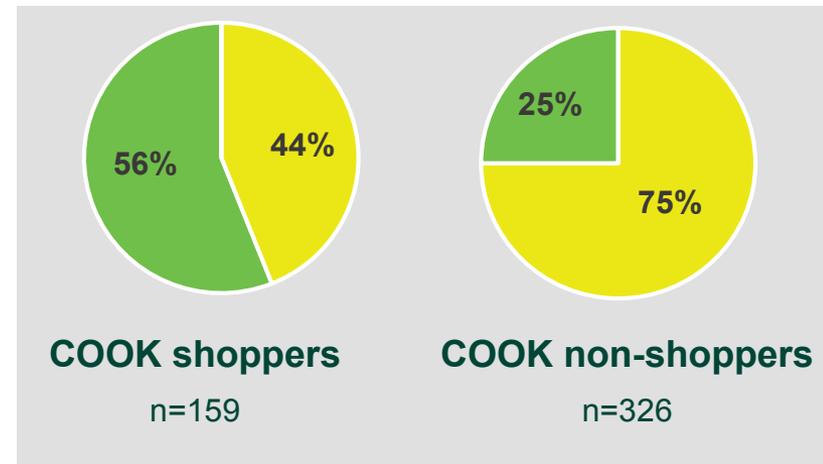
Most consumers are unaware of COOK, but amongst their shoppers, the majority feel they have improved their perceptions of frozen food

COOK has:



- Not changed my opinions about frozen food
- Made me reconsider frozen food
- I have not heard of COOK

Greatest awareness of COOK amongst the 25-34s and people living in London



Conclusions

- Two thirds of Brits consume frozen food **at least weekly** with less than 1 in 10 people never consuming frozen food at all.
- **Frozen desserts** are a less frequent treat with only a third eating those at least weekly
- Men; people age 25-34; and those living in the North East are **more frequent** frozen food consumers
- **Frozen chips** and **frozen vegetables** are eaten the most often
- Compared to fresh, most people believe **frozen food is on a par** however a third believe frozen is worse. This is because they believe frozen food is **not as fresh** and is **lower quality**, with these opinions even more common among younger consumers. Tackling these perceptions, and especially among the younger consumers will be key to enhance frozen food sales
- 3 in 10 also say they tend to cook from scratch instead; this may be a more difficult barrier to overcome.
- Efforts by **Iceland** and **COOK** to change perceptions have had some impact in shifting perceptions, especially amongst their shoppers.



Appendix

Approach & Demographics



Approach and Panel

- We conducted an *online omnibus survey* with **2,025 adults** aged **16+** across **England, Scotland, and Wales** between **6th February and 10th February 2017**
- The survey took place using the *Harris Interactive online panel*,
.....the **Harris Interactive Global Omnibus**.
- The Harris Interactive Global Omnibus consists of members of the *general public* who have opted in and voluntarily agreed to participate in online research studies. Through careful recruitment and management, *we are able to rapidly survey large numbers of the general population* and accurately *represent the views of the nation*.

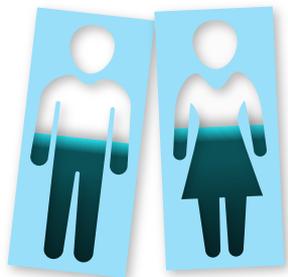


Omnibus Audience

A representative Sample

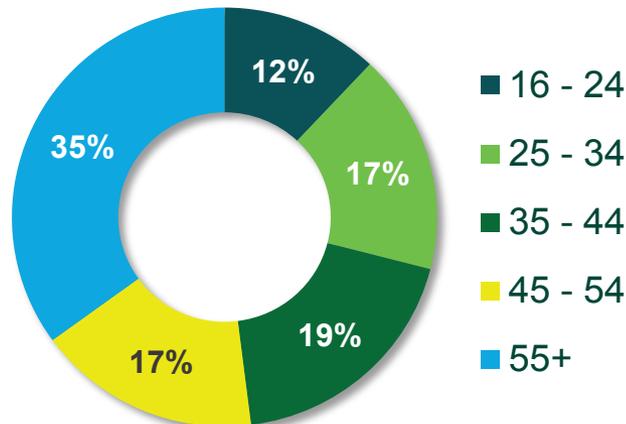
- The results of the study were weighted to best reflect the size and shape of the population of the UK
- This means that the results in this report reflect an audience that is as true as possible of the population with the same age, gender and regional profile. The audience profile is detailed below.
- Of course not everyone in GB has internet access, but online panel research results are considered to be extremely accurate. In fact, according to the British Polling Council, Harris Interactive was the most accurate *online* polling company during the UK elections in 2010: <http://www.britishpollingcouncil.org/press100508.html>

Gender

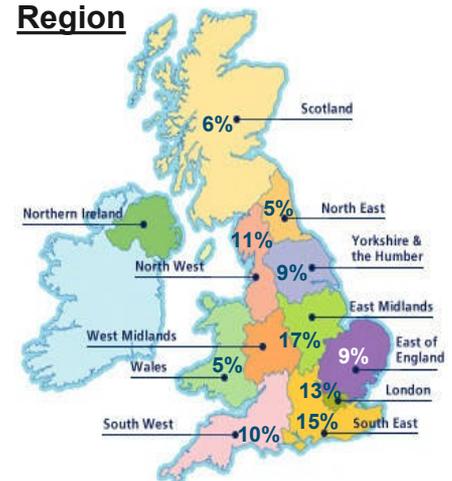


48% 52%

Age



Region



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