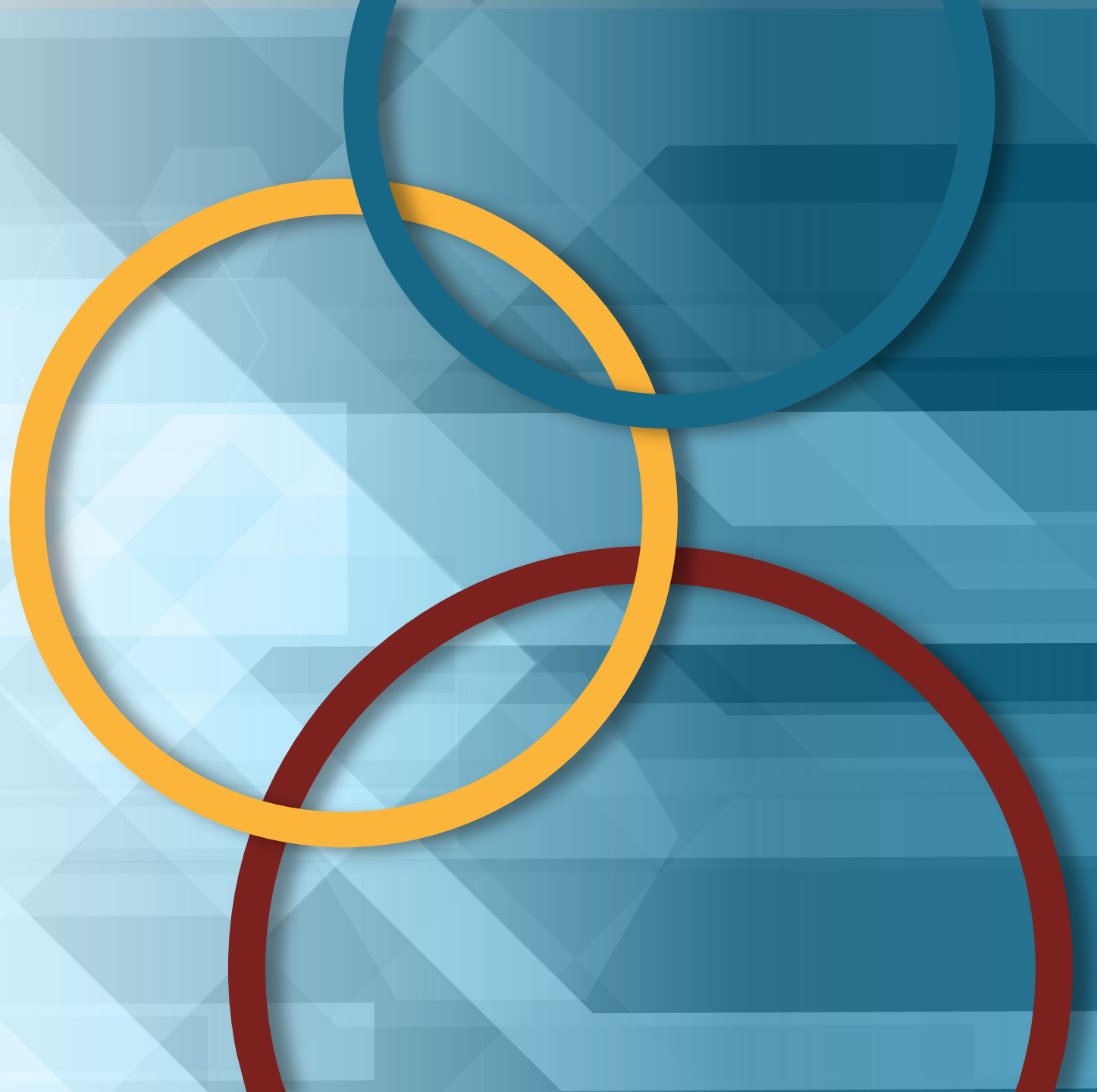




Data-Fueled Strategies to Move Consumers into the Frozen Aisle

October 24, 2024

Stephen McCauley
The Ginger Network



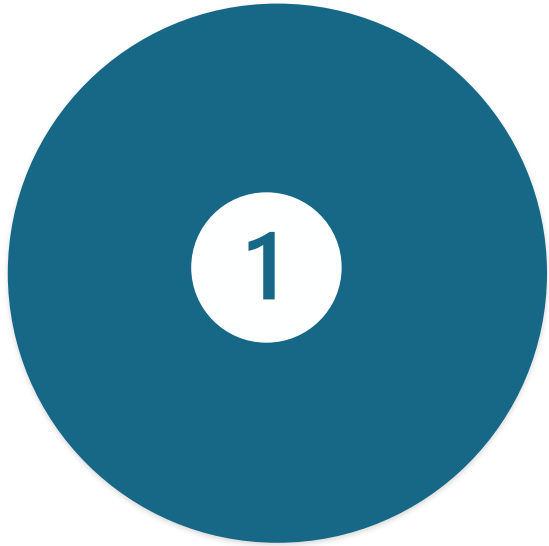


The consumer view of frozen food has a direct relationship to category success.



Canned
Beans

OPEN THE POSSIBILITIES



PRIMARY

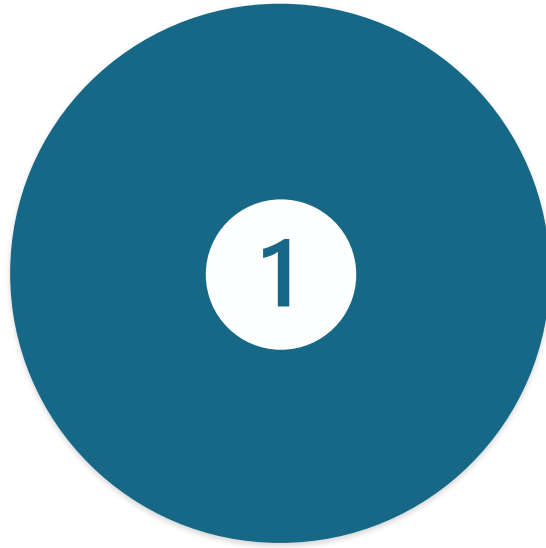


SECONDARY



**PROFESSIONAL
EXPERIENCE**

Plethora of Research



PRIMARY

Closer Look at Primary Research

Methodology

Qualitative – May 2023

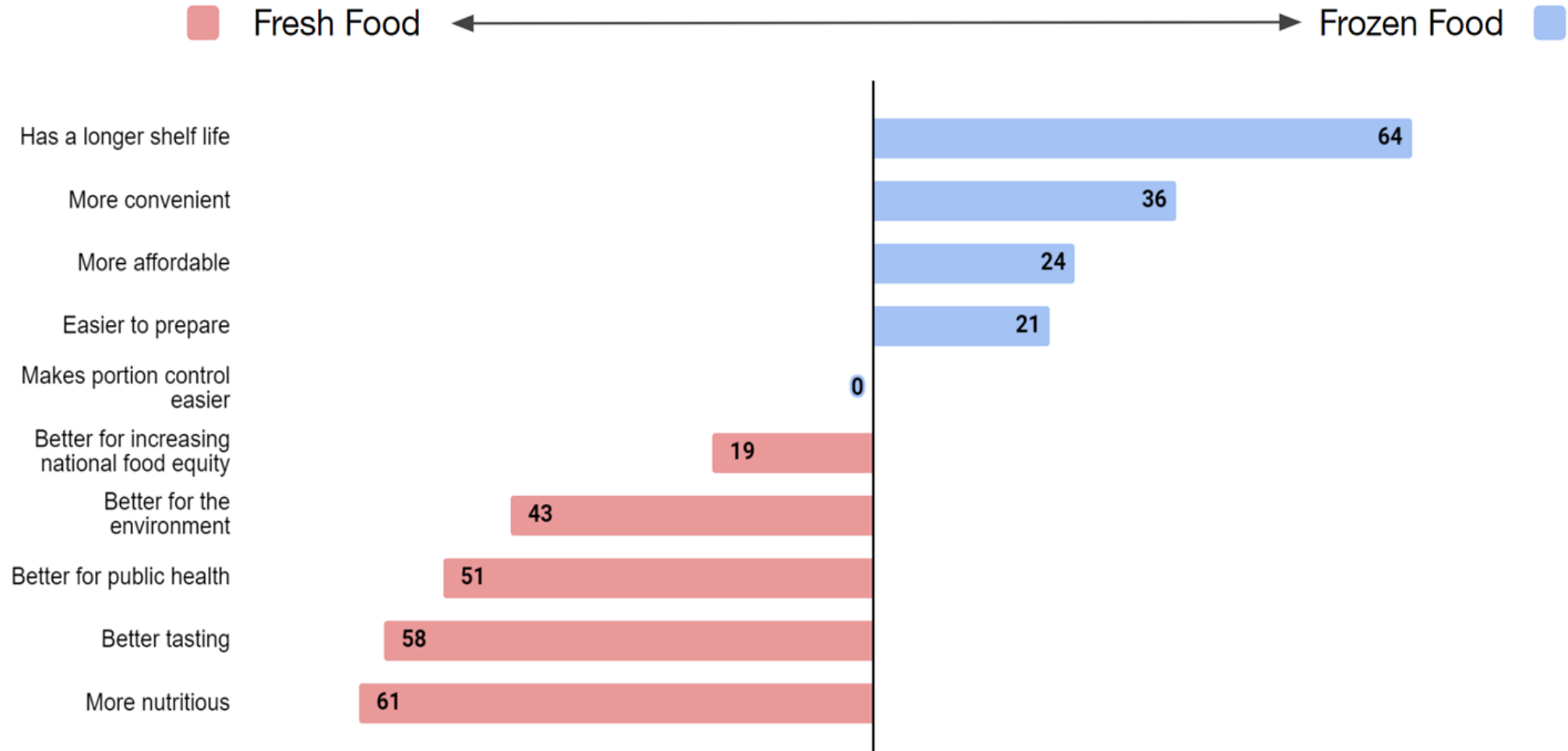
- Focus groups with two groups of Policy Insiders and two groups of General Population Consumers.

Quantitative – June 2023

- Online survey of n=850 General Population Consumers and n=150 Opinion Elites.

Total Sample	General Population Consumers	Opinion Elites
n=1000 MOE: +/- 3.1%	n=850 MOE: +/- 3.36%	n=150 MOE: +/- 8%

Frozen is Perceived as Convenient and Cheap; Fresh is Perceived as Better to Eat.



For Consumers: Messages Must Address the Need to Keep Costs Down, and the Desire for Healthy, Quality Food

Messages <i>How does this statement affect your attitude about buying frozen foods in the future?</i> <i>% who say “much more likely”</i>	Consumers <i>(n=850)</i>	Target Audience <i>30-49, Very Likely to Buy Frozen</i> <i>(n=267)</i>	Conscious Consumers <i>Always or most of the time making a conscious effort to reduce their environmental impact</i> <i>(n=487)</i>
Peak Freshness Year-Round	36%	44%	43%
Natural Freezing	32%	46%	39%
Nutrition	32%	45%	39%
Food Waste (Financial)	31%	43%	40%
Affordability	31%	40%	36%
Food Waste (Environment)	30%	42%	40%
Ease of Preparation	29%	37%	35%
Access	28%	42%	35%
Convenience	26%	32%	30%
Labels	24%	37%	30%
Portion Control	24%	33%	32%

* Green shading signifies the top two messages.

Messages

***Opinion Elites:** How would this statement impact your likelihood to support frozen food as a part of federal food assistance programs or dietary guidance in the United States going forward?*

% who say “much more likely”

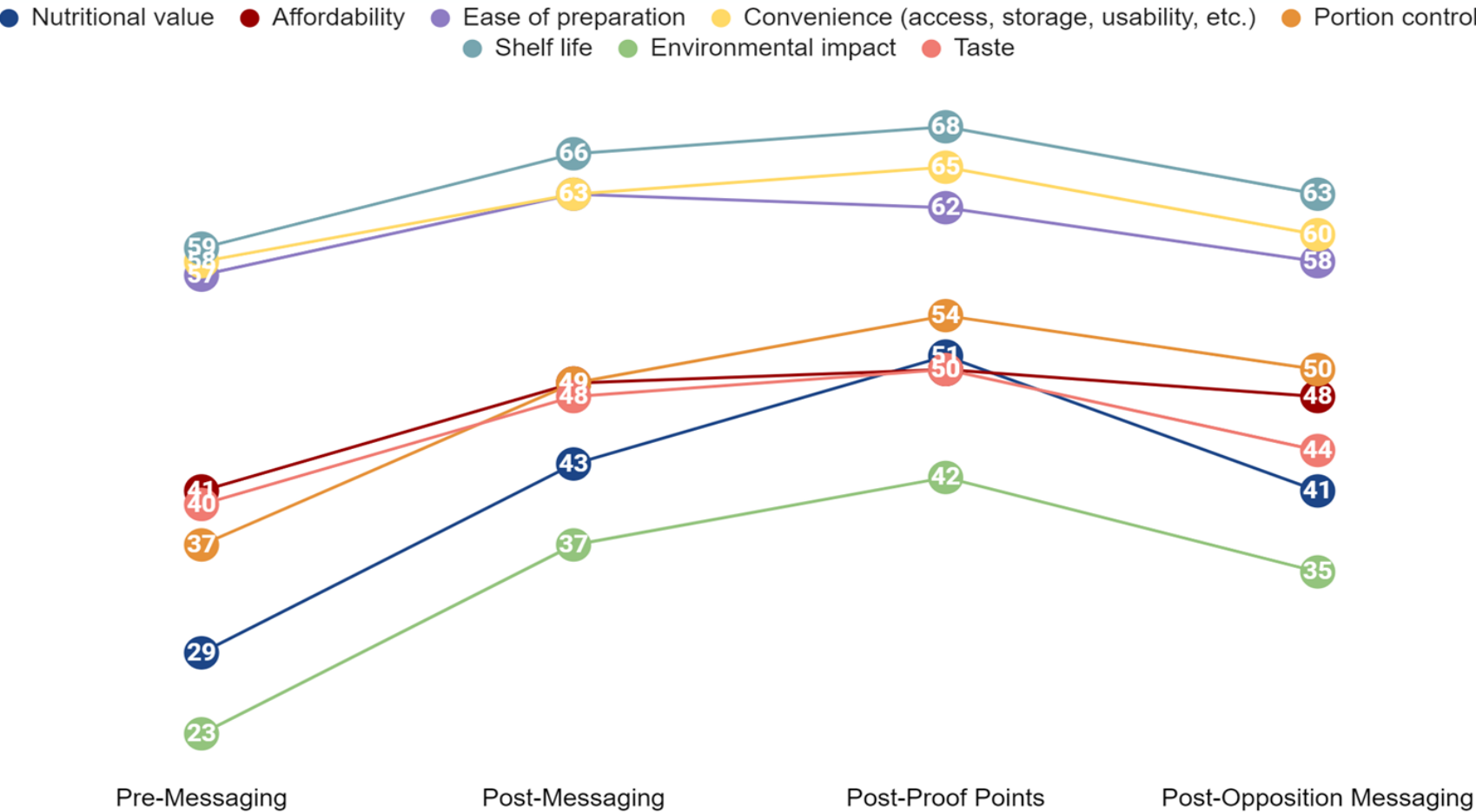
Opinion Elites (n=150)

Nutrition	52%
Food Waste (Environment)	46%
Affordability	45%
Peak Freshness Year-Round	42%
Food Waste (Financial)	41%
Access	40%
Natural Freezing	39%
Ease of Preparation	37%
Labels	36%
Food Equity	35%
Portion Control	32%
Convenience	25%

**Opinion Elites
are Focused on
Frozen Food’s
High-level
Societal Impacts
- Particularly its
Health and
Environmental
Benefits.**

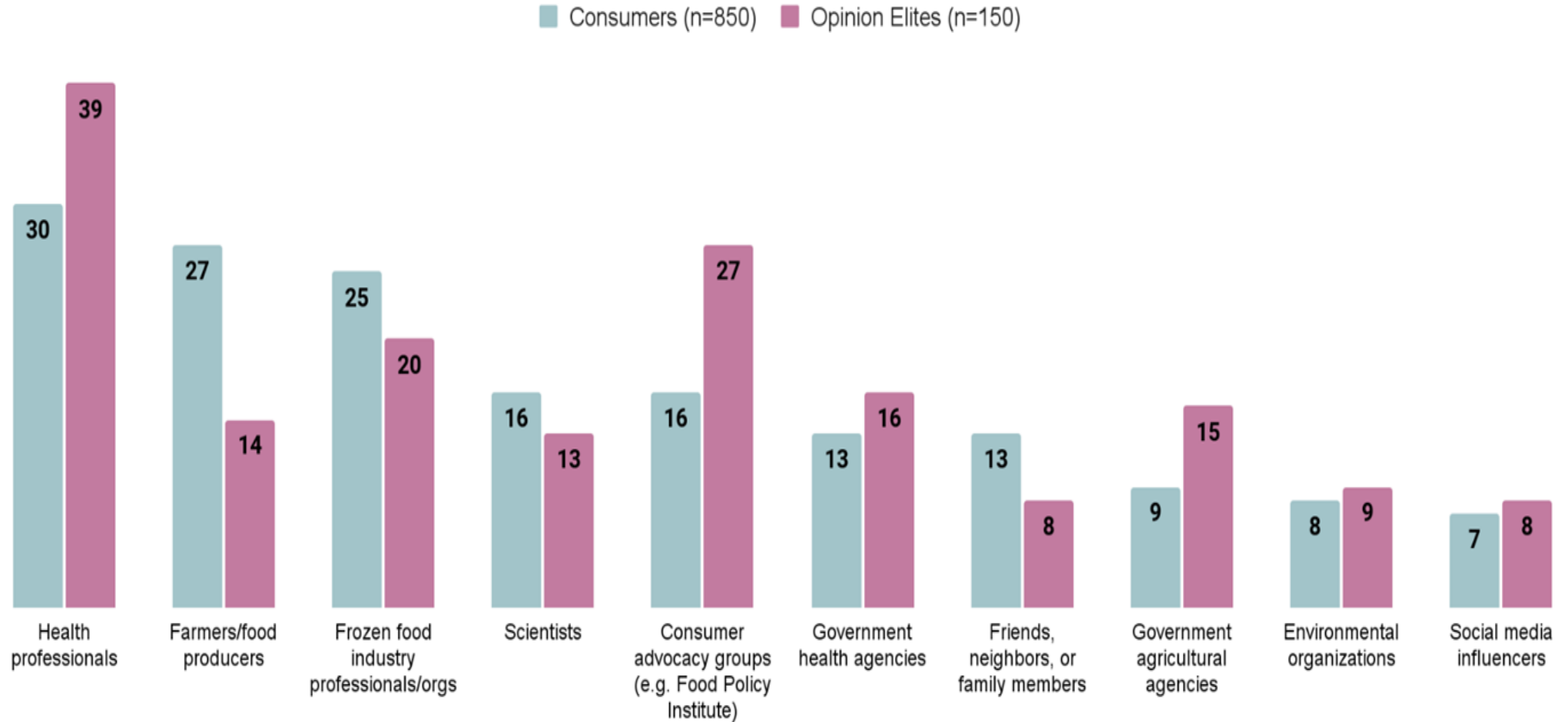
** Green shading signifies the top two messages, while red shading signifies the bottom two messages.*

Nutrition and Environmental Impact Perceptions Show the Most Significant Improvements.



Consumers View Health and Industry Professionals as Highly Credible

Opinion Elites View Health Professionals and Advocacy Groups as Authorities

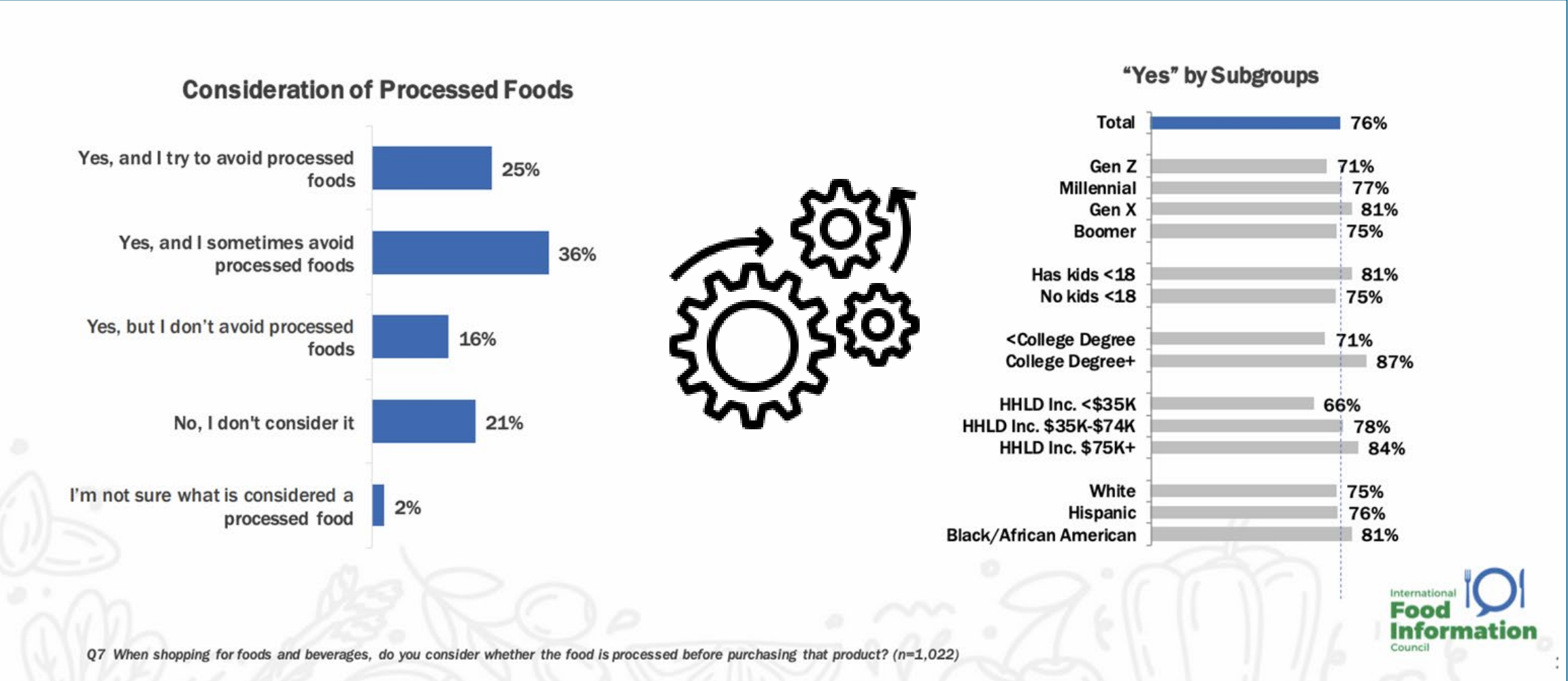




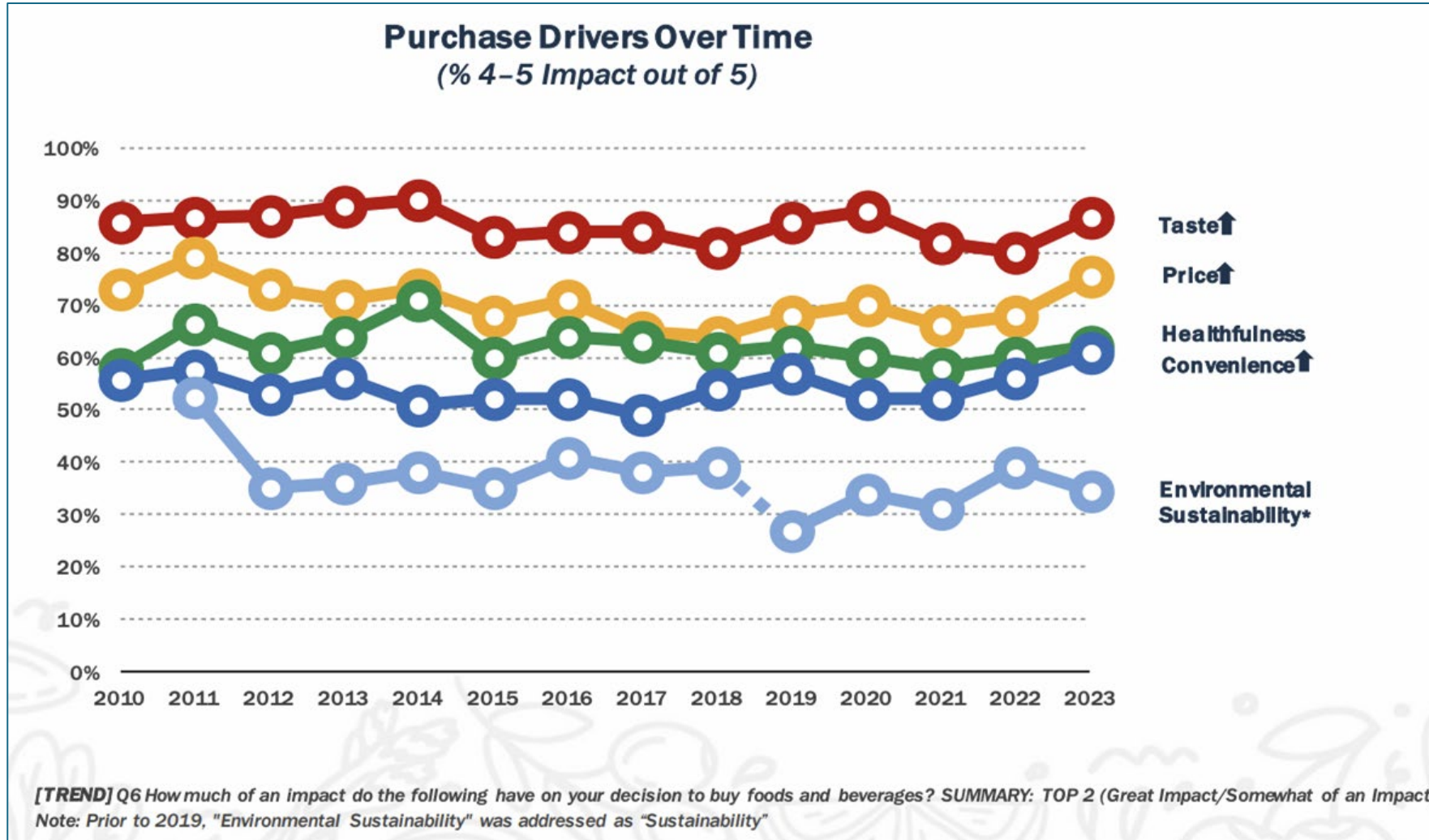
SECONDARY

Closer Look at Secondary Research

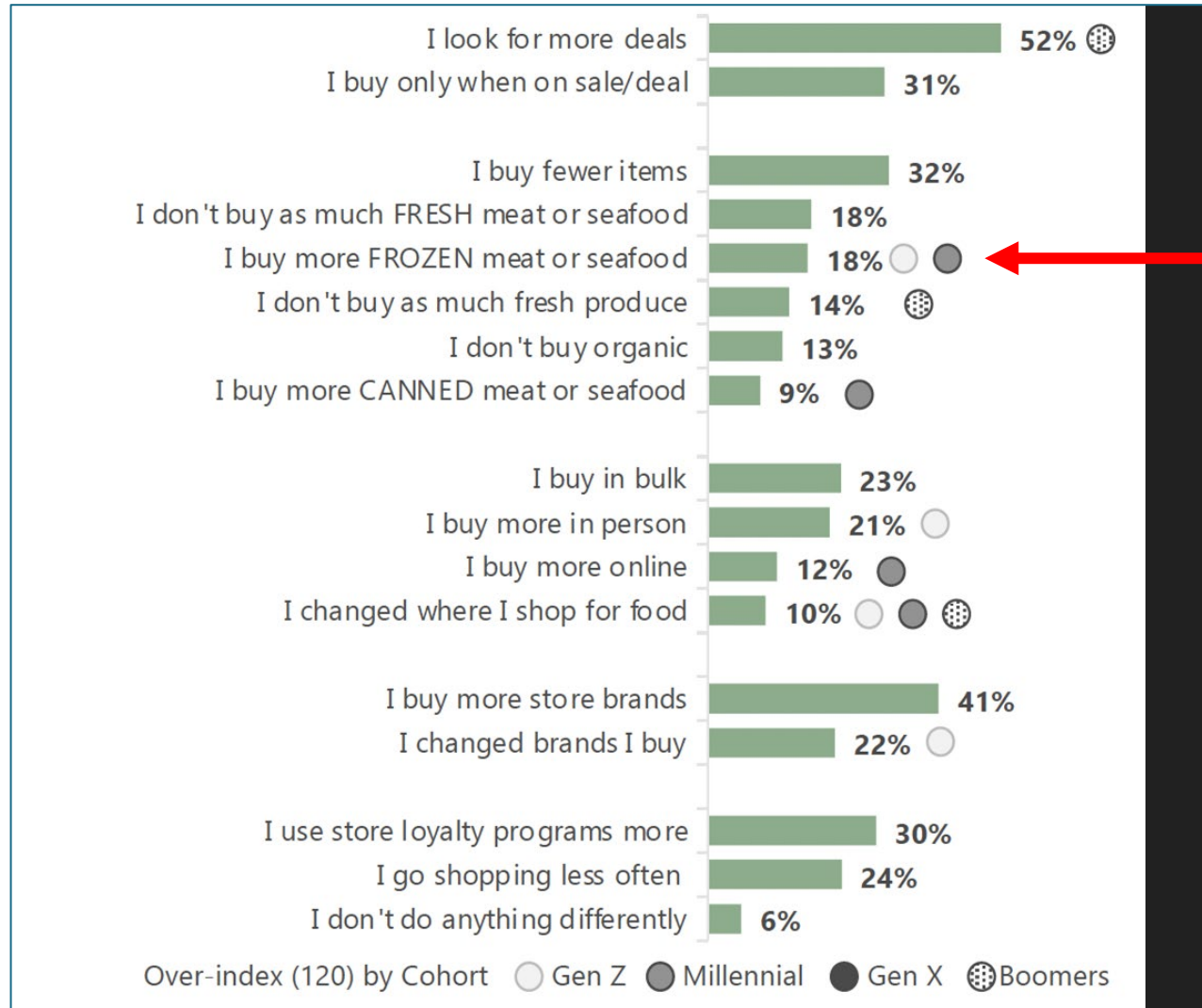
Three in Four Say They Consider if Food is Processed



Price is Significantly More Important Today

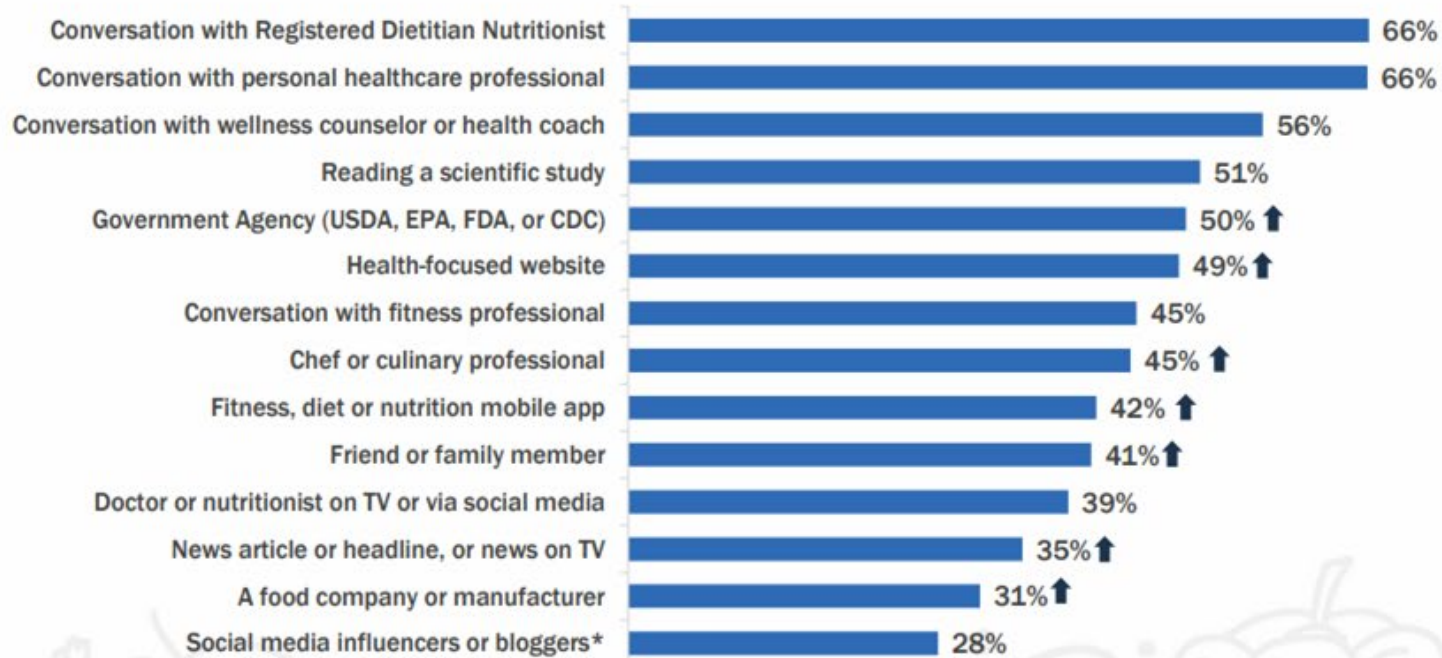


Nearly One in Five are Buying More Frozen Meat or Seafood



RDNs are Most Trusted Source of Nutrition Information

Trust Sources of Information on Foods to Eat/Avoid
(% 4-5 Trust out of 5)



*Revised text vs. 2018



**PROFESSIONAL
EXPERIENCE**

Closer Look at Professional Insights

Professional Insights

Positive



Consumers and policy influencers see health professionals as credible messengers for frozen foods.



Policy influencers find the food waste/environmental impact of frozen foods to be compelling.



Consumers and policy influencers are moved by proof points explaining the freezing process and quantifying frozen food's waste-saving potential.



Policy influencers are consumers too, and they will be influenced by credible messages.

Professional Insights

Negative

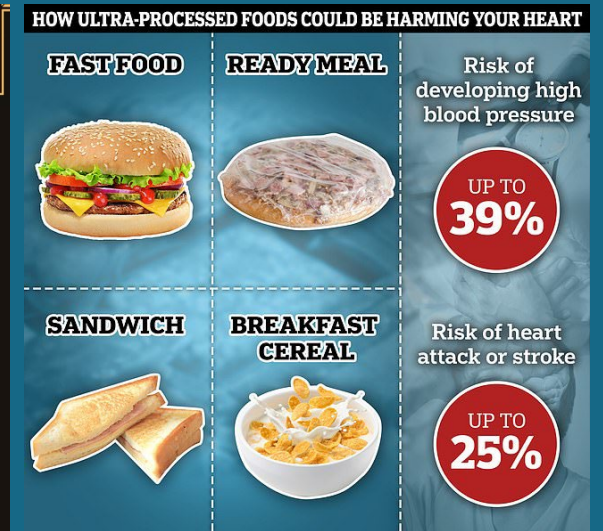
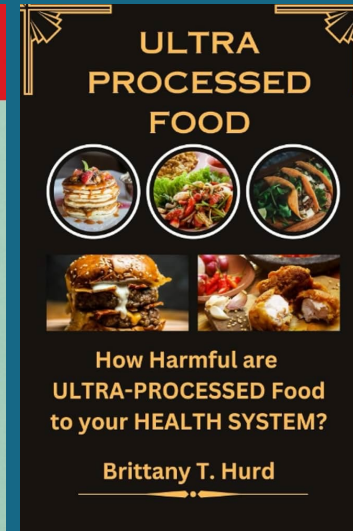


Negative perceptions about taste and nutrition eclipse AND are fueled by price and convenience benefits of frozen foods.



The ultra-processed narrative is resonating negatively with consumers and policy influencers.

Ultra-Processed Food Movement



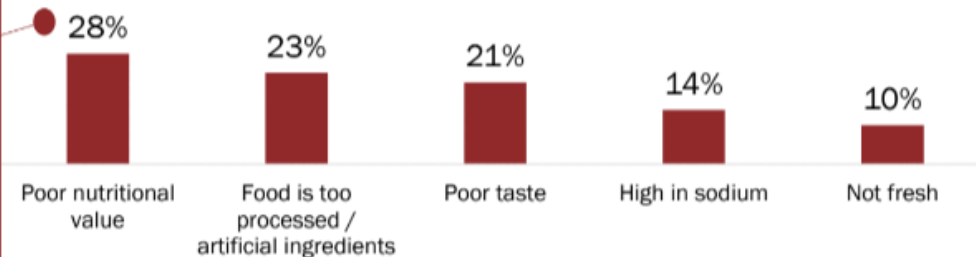
Greatest
Current
Challenge:
Perceived Poor
Quality of
Frozen Foods

The biggest drawbacks to frozen foods are seen as poor nutritional value and too processed

- Poor taste and high in sodium are listed as other key drawbacks.

Top Drawbacks Associated with Purchasing and Eating Frozen Foods
[OPEN END]

DC elites are divided on the nutritional value of foods, which is top of mind for many. While 23% immediately cite good nutritional value as a benefit of frozen foods (see previous slide), 28% immediately cite poor nutritional value as a key drawback.



*"It is often **over-processed**, it can **lose taste and nutrition**, and it often has **ingredients I try to avoid**."*

*"They **do not taste as good** as fresh foods and may **lose some of their nutritional value**."*



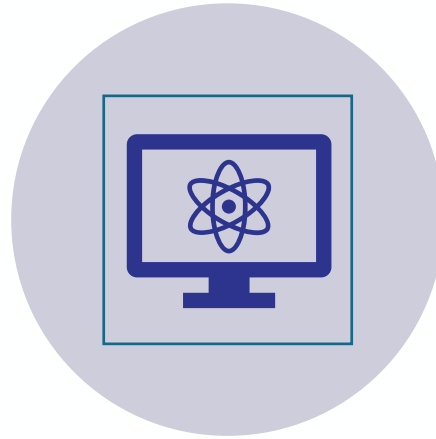
**How Do We Leverage
These Insights?**

AFFI Evolution

New Imperatives



TELL OUR STORY BETTER



**USE CREDIBLE PROOF
POINTS**



**ENGAGE RELEVANT
STORYTELLERS**



TELLING OUR STORY BETTER

Words Matter: Shift the Narrative Related to Frozen Foods

Frozen
V
Fresh



Frozen
V
Not Frozen

Strategic Messaging Pillars

Frozen Food is Quality Food

Policy Influencers



Flavor and Texture

Nutrition

Fresh

Accessibility (Food Waste, Affordability)

"Frozen foods offer an excellent sensory, textural and flavorful experience...as good as 'not frozen'."

"Frozen fruits, vegetables, entrees, proteins and snacks are nutritious ...as nutritious as 'not frozen'."

"Today's technical advancements allow foods to be frozen at the peak of freshness, using technology to lock in flavor."

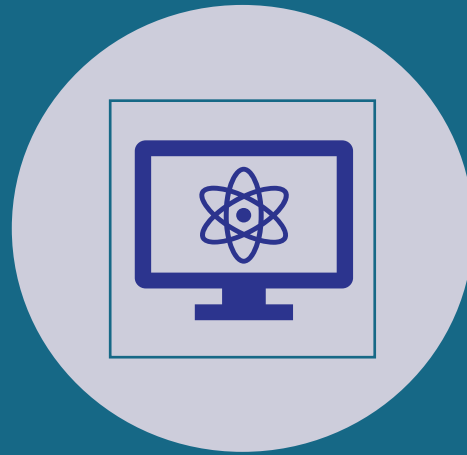
"Frozen foods cost less and have a longer shelf-life than refrigerated or fresh foods, meaning less opportunity for wasted food."

Supporting Evidence:
Document the quality of frozen foods: sensory experience, taste, texture, flavor

Supporting Evidence:
Document the nutrition story for frozen fruits, vegetables, entrees, proteins, and snacks

Supporting Evidence:
Develop technical paper to explain in simple terms "freezing at the peak of freshness."

Supporting Evidence:
Leverage existing research and measure cost savings of reduced food waste.



USING CREDIBLE PROOF POINTS

Leverage Credible Science



New documented research on the quality of frozen foods: sensory experience, taste, texture, flavor



New and existing documented research on the nutrition story for frozen fruits, vegetables, entrees, proteins, and snacks



New technical paper to explain in simple terms “freezing at the peak of freshness”



Existing research and measure cost savings of reduced food waste.



ENGAGING RELEVANT STORYTELLERS

Audiences

**Registered
Dietitian
Nutritionists**

(With national media
platforms and engaged in
food policy)

**Policy
influencers
and makers**

**AFFI members
and Cold Chain
Partners,
Retailers**

Strategic Approach



Tell a new/newsworthy story... about QUALITY



Support the new story with strong evidence – flavor, texture, nutrition and freshness science



Target new audiences who are motivated to amplify our quality story



Surround policy makers with positive consumer messaging. Lean into food waste with Congress/regulatory agencies.

Reality Check

Affecting Change: A Long Journey



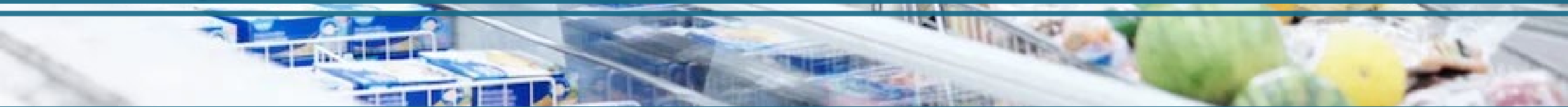
Awareness

Attitude

Behavior



Together We Can Move More Consumers Into The Frozen Food Aisle





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