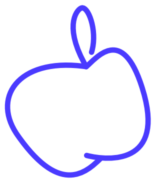
January 2025

Spotlight on Frozen Food

In collaboration with

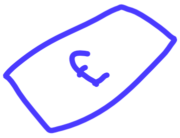
British Frozen Food Federation

Highlights

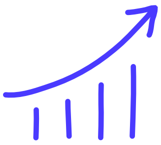


The overwhelming majority (94%) of UK consumers buy discounted frozen foods, with 52% opting for this a lot.
Page 5

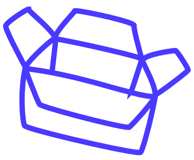
Two-thirds (66%) of consumers are more likely to buy frozen food that is labelled as sustainably sourced or produced
Page 7



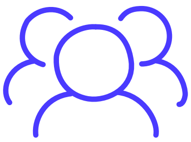
Over half of consumers (55%) will pay extra for frozen foods that are sustainably sourced.
Page 7



Nearly nine in ten (89%) of consumers think that the nutritional quality of frozen foods has improved in recent years, with a quarter (26%) saying the improvement has been significant.
Page 9



Two-thirds (65%) of consumers check to see if preservatives, artificial flavours or additives have been added to frozen foods.
Page 7



Just a quarter (25%) of UK grocery shoppers think that the higher prices of premium frozen brands are always justified.
Page 13

Dive into our Spotlight on Frozen report to discover key insights and cross-sector takeaways.

Methodology

Vypr is a **leading product intelligence platform** designed to empower brands with the insights needed to make informed product decisions at the right moments. Our platform leverages a **proprietary community of over 80,000 UK consumers**, providing our cutomers with direct access to real-time feedback. This unique capability allows brands to refine their strategies and develop products that truly resonate with their target audiences.

At Vypr, we go beyond traditional market research by focusing on the immediate, intuitive reactions of consumers. Instead of lengthy questionnaires, we engage our community with short, targeted questions that capture fast, instinctive responses. This approach is rooted in the principles of **System 1** thinking, a concept popularised by Daniel Kahneman in his seminal work, Thinking, Fast and Slow. System 1 represents the brain's quick, automatic decision-making process, which is responsible for approximately 95% of purchasing decisions. By tapping into this cognitive function, Vypr enables brands to understand consumer behaviours and attitudes with **accuracy and speed**.

Research Methodology

The findings in this report are based upon first-party research, conducted between October 2024 and December 2024. The primary research apparatus used to collate consumer feedback was a bespoke survey application, available on smartphone. The application is device agnostic and allowed a nationally representative community of real UK consumers to provide answers to a broad range of questions. To deliver comprehensive insights, Vypr adopts a mixed-method approach, by integrating both **qualitative and quantitative** research methodologies.

Qualitative Research

For our qualitative research, we utilised two distinct types of questions:

Free Text Responses: Engaging a sample size of 50 consumers, this approach allowed respondents to provide open-ended answers. These responses offer deep, personal insights into consumer thoughts and attitudes, capturing the nuances of their experiences.

Sentiment Analysis: Leveraging AI technology, we analysed responses from 250 consumers to summarise the overall sentiment, whether positive or negative, related to specific topics. This method provides a clear understanding of the emotional tone behind consumer feedback, highlighting the underlying sentiments that drive behaviour.

Quantitative Research

Our quantitative research was designed to capture structured, statistically significant data:

Sample Size and Question Types: We conducted surveys with a robust sample of 1,000 consumers. This larger sample size ensures the data is representative of the broader population, allowing us to draw meaningful conclusions across different demographics.

Single and Multi-Answer Multiple Choice Questions: These questions offered respondents a range of predefined options, enabling us to measure consumer preferences and behaviours with precision.

Vykert Scale: Our proprietary Vykert question, a refined version of the traditional Likert scale, uses a sliding scale to capture the intensity of consumer opinions. This provides a more nuanced view of their preferences and attitudes.

Representation: All quantitative research was conducted using a nationally representative sample of 1,000 consumers. This means that proportionate weightings, aligned to the most recent ONS population data (2024), were used to ensure proportional representation associated to age and gender

In Brief

Frozen foods are riding high, with consumers increasingly recognising their nutritional quality. Own brands are thriving, competing effectively with premium frozen products and holding their ground in the market.

This spotlight, created in collaboration with The **British Frozen Food Federation**, explores how the frozen food sector is evolving to meet consumer needs. It highlights key trends, from shifting purchase motivations to the growing importance of health, wellness, and sustainability.

While frozen foods remain a cost-efficient choice, consumers recognise their added benefits over fresh alternatives. Convenience – not price – emerged as the top purchase motivator, with longer shelf life coming in second. As new demographics explore the frozen aisles, expectations are shifting. Health and wellness concerns are becoming more prominent, and sustainability has taken centre stage as one of the few areas where people are willing to pay more.

Brands that can successfully balance sustainability and health with taste, convenience, and price are well-positioned to thrive. However, a little extra consumer education may be needed to overcome lingering misconceptions around additives and processing. Together with The British Frozen Food Federation, this spotlight provides insights to help brands navigate these challenges and seize new opportunities.

Nutritional Quality Driving Growth: Almost nine in ten (89%) UK consumers have noticed an increase in the nutritional quality of frozen foods, with own brands competing effectively against premium options.

Convenience Outweighs Cost: While frozen foods are still valued for their cost-efficiency, convenience emerged as the top motivator for 33% of consumers, followed by the longer shelf life of these products.

Health, Sustainability, and Innovation: As more demographics explore frozen foods, health and wellness concerns, along with sustainability, are now paramount. These are some of the few areas where consumers are willing to pay more. Brands that address these priorities while educating consumers about additives can unlock new opportunities.

Frozen Food and Purchasing Habits

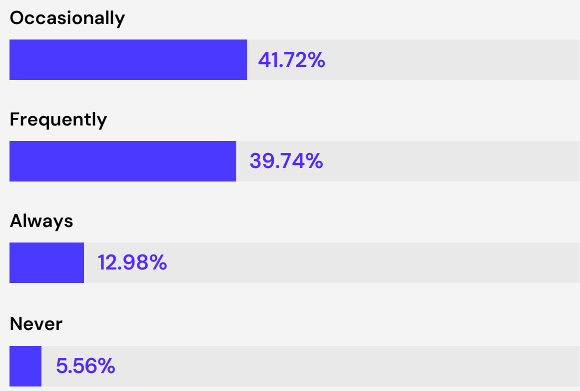
The UK's frozen food market is one of convenience, affordability and, increasingly, sustainability. Consumers are looking to buy their vegetables, potato products and meat (in that order) in a way that's good for the planet as well as the purse. Over half of consumers care about the origin, production and packaging of frozen foods. And for the right levels of sustainability, they're willing to pay more.

Origin Matters to Consumers: Over half (52%) of UK consumers consider the origin of frozen foods important.

Supermarket Preferences by Age Group: Tesco tops the list for frozen food, however, different age groups showed distinct supermarket preferences. Gen-Zs (under the age of 25) generally prefer to buy their frozen foods in Iceland, younger millennials (aged 25-34) opt for Tesco, while older millennials go to Sainsburys.

Key Factors When Choosing Frozen Foods: When picking out frozen foods, over a third of shoppers (34%) check to see if it has been locally grown or produced. A quarter (25%) are drawn in by a free trade label while just over one in five (24%) check to see if its award-winning.

How often do you buy frozen food products when they are on sale or discounted?



Sent to a nationally representative sample

Discounts Drive Frozen Food Purchases: The overwhelming majority (94%) of UK consumers buy discounted frozen foods, with 52% opting for this a lot.

Frozen Foods Are Perceived as Cheaper: Less than one in five (8%) of consumers think that frozen foods are usually more expensive than fresh foods. The vast majority think it is cheaper.

Sustainability Matters: How frozen food is wrapped matters, more than one in two (52%) grocery shoppers care about the impact of its packaging.

Two-thirds (66%) of consumers are more likely to buy frozen food that is labelled as sustainably sourced or produced and over half of consumers (54.92%) will pay extra for frozen foods that are sustainably sourced.

> **It is important for frozen foods to be sustainably sourced because it promotes animal welfare, ensures food safety, reduces carbon footprint, reduces waste"**
>
> Male 25 – 34

> **Sustainably sourcing and producing frozen foods is important because it helps protect the environment, supports ethical labour practices, and ensures that resources are used responsibly.**
>
> Male 35 – 45

Vegetables Lead Frozen Food Choices: The most popular frozen foods are vegetables, with over a quarter (28%) of consumers regularly picking them up. In second place are potato products (19%) and third is meat or poultry (15%).

Convenience is Key: Convenience is the top motivation for buying frozen food in the UK, as voted by a third of consumers (33%). While, for a quarter (25%) it's the longer shelf life that draws them to the frozen aisle.

Brand Reputation Shapes Quality Perception: When it comes to assessing quality, over a quarter (28%) of grocery shoppers consider the reputation of the brand. Other important factors are price and product appearance, according to 23% and 19% of consumers, respectively.

Ultra-Processed vs Health and Wellness

Health and wellness take a generational divide in the frozen food aisle, with under-45s six times more willing to pay for fewer additives. This could be because over-45s are becoming more cost-sensitive. But our data suggests that consumers are pushing for healthier options, which have seen an increase over recent years. Two-thirds of consumers are scanning ingredient lists to look for artificial ingredients or signs of heavy processing, and there are mixed views about how healthy these products really are. Our research suggests that a little education could clear up some of the gaps and improve the image of frozen foods.

Frozen vs Fresh: A Health Perception Divide: Most UK consumers (60%) think that fresh and frozen foods are equally healthy, with an even spread of people on either side. This suggests that there could be some general education or awareness gaps.

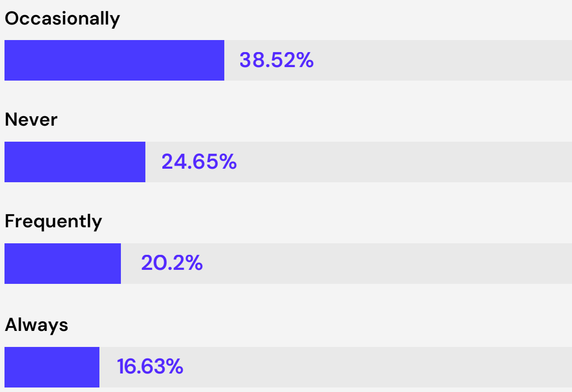
If consumers were told more about the health benefits, three in five (59%) would have a better opinion of frozen foods.

Concerns About Processing and Additives: Nearly half (46%) of consumers associate frozen foods with being heavily processed or containing additives, with 18% feeling this strongly.

If they found out that this was not the case, two-thirds (66%) would have a better opinion, rising to 70% in the 35-44 age category.

Two-thirds (65%) of consumers check to see if preservatives, artificial flavours or additives have been added to frozen foods [FIG 2]. An outlier group is baby boomers, where over half never check.

When choosing frozen foods, how often do you check for ingredients like preservatives, artificial flavours, or additives?



Sent to a nationally representative sample

Ultra-Processed Perceptions Persist: Almost one in two (48%) of consumers think that frozen aisles contain more ultra-processed foods (UPFs) than fresh ones.

If this group discovered that the truth wasn't as bad as they believed, two-thirds (66%) would have a more favourable view of frozen foods.

> **I find frozen food rarely cook as well as fresh foods. But they last forever, so for me there is a time and place for each. Frozen food certainly reduces food waste which is a bigger thing nowadays.**
>
> Male 55 – 65

> **One of the things that might still hold me back from viewing frozen foods more positively is potential degradation of omega 3 fatty acids.**
>
> Male 25 - 34

Health Trends in Frozen Aisles

Consumers Want Clean Labels: Two-thirds (67%) of consumers would be willing to pay more for frozen foods which are "free from ultra-processed ingredients" or "clean label". But for most of them (44% of the total), only if the price wasn't too high.

Nutritional Quality on the Rise: Nearly nine in ten (89%) of consumers think that the nutritional quality of frozen foods has improved in recent years, with a quarter (27%) saying the improvement has been significant.

Top Consumer Concerns About Frozen Foods: The most off-putting things about frozen foods are the taste and texture – with 37% of votes, the quality of ingredients (36%) and if it's ultra-processed (26%).

- For consumers aged between 34-44, nutritional content is the top concern
- The 45-65 age group are more concerned about high fat, salt and sugar content

Healthier Alternatives in Demand: Nearly one in five (19%) consumers always seek out healthier alternatives in the frozen food aisles, rising to almost one in two (46%) for vegans. And over a quarter of consumers (27%) notice health food trends in the frozen section and actively buy into them.

Perceptions of own-branded vs premium branded

As they browse the frozen aisles, consumers care most about taste and quality, with price being a secondary concern. Yet despite this, more than half will always put back a premium frozen product if there is an own-brand version available. Our data suggests that this is because the perceived quality of own-brand frozen foods has increased. However, while they may not always believe that the price tag is justified, consumers do still perceive premium brands as having superior "quality" and "sustainability" factors than own-brand versions.

Store Brands Take the Lead: There is a slight preference for buying store-branded frozen foods, but overall, most consumers will buy a mix of both.

Key Factors in Brand Decisions: When deciding between own-brand or premium products, taste and quality are what consumers consider the most (with 38% of votes). The second factor is usually price, and then thirdly, nutritional content, with 32% and 11% of votes, respectively.

- For Gen-Zs aged 18-24, the packaging and brand is the most important factor

Taste vs Premium Price: When choosing between price or taste, almost half (46%) of consumers value them equally. Among the rest, taste is the clear winner, with more than double the number of people prioritising it (33%) over price (15%).

I've noticed own-branded frozen products have improved in flavour, quality, and variety, with healthier options, international choices, and eco-friendly packaging, all while staying affordable.

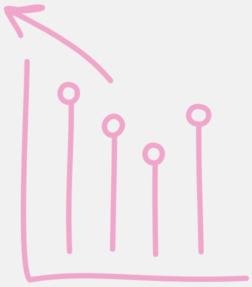
Female, 25-34

Despite this, premium frozen foods often lose out to store brands. Over half (53%) of UK consumers consistently opt for own-brand options if available, and only one in five (21%) believe premium brands taste significantly better. The majority feel premium options taste only slightly better (40%) or about the same (35%), with a small portion (5%) thinking they taste worse.

That said, quality still holds sway. Nearly two-thirds (65%) of grocery shoppers would pay more for premium frozen products if they delivered superior taste or quality. Encouragingly, the quality of own-brand frozen foods is also on the rise, with two-thirds (65%) of consumers recognising improvements and a quarter (26%) noting significant progress.

Consumers have most noticed:

1. **Better nutritional values,**
2. **Healthier options**
3. **Clearer labelling**
4. **More variety**
5. **Less additives**
6. **Less preservatives**



Factors like high quality ingredients and good sustainability practice would influence my choice between a premium brand and an own-brand product if they were priced similarly

Consumer, 25 – 34

I often associate premium brands with higher quality, which can sway choice, especially for products where quality is crucial and brand loyalty, products availability

Male, 35-44

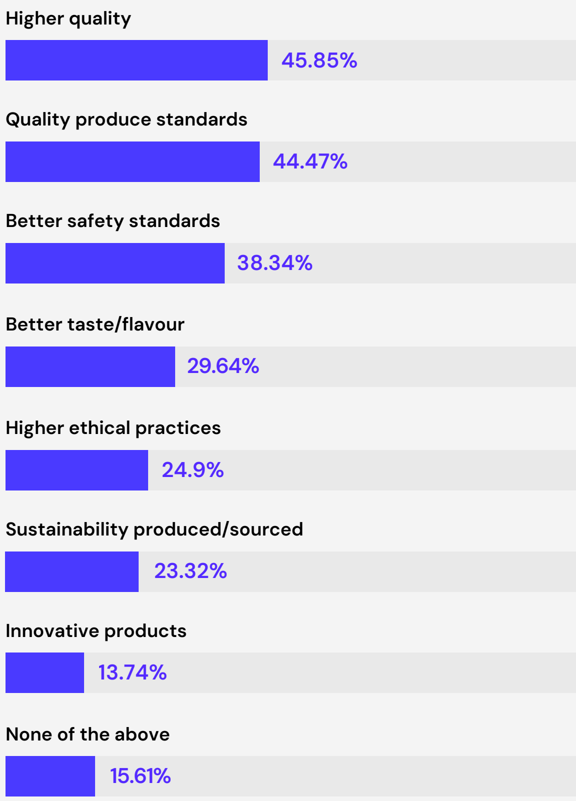
The Frozen Food Revolution

Food waste has become a mounting problem around the world, as the climate and cost-of-living crises continue to unfold. Although around half of consumers understand how frozen foods can help them throw away less food and save money, there is an inertia when it comes to taking action. Over two-thirds of households still put edible food in the bin every week. The good news, however, is that those using their freezer to reduce waste are finding success—seven in ten report it helps with portion control, and almost two-thirds are satisfied with the quality of their frozen foods. Leading this frozen food revolution, the **British Frozen Food Federation** champions the role of frozen foods in tackling food waste and supporting sustainable living.

- One in four (43%) of consumers look out for logos like the British Frozen Foods Awards on the packaging
- The British Frozen Foods Awards logo is associated with higher quality (46% of votes), quality production standards (45%), better safety standards (38%) as well as a better taste and flavour (30%).
- Over half (55%) of consumers are more likely to choose a product that has this logo

BRITISH FROZEN FOOD AWARDS

Do you, or would you, associate the British Frozen Food Awards logo with and of the following attributes? (select all that apply)



Frozen Revolution:

The Scale of Food Waste: Food waste remains a significant issue, with more than two-thirds (67%) of consumers discarding edible food every week.

Opportunities to Reduce Waste: Over half (55%) of consumers believe they could waste less food, identifying better meal planning (25%) and buying more frozen foods (12%) as potential solutions.

Frozen Foods as a Solution: Frozen foods are increasingly recognised as an effective way to reduce waste. Just under half (44%) of consumers see frozen foods as a cost-efficient method for portion control, while one in three (34%) appreciate their extended shelf life. Seven in ten (71%) find frozen food helpful for managing leftovers and portion sizes, with nearly a third (32%) doing so consistently.

Awareness and Education Gaps: Most consumers (51%) are aware of frozen food's waste-saving benefits, but one in five (21%) are only learning about this now. Meanwhile, almost a quarter (23%) of consumers still don't see how reducing food waste could help them save money, highlighting an education gap.

Satisfaction and Misconceptions: Nearly two in three (62%) consumers are satisfied with the quality of frozen foods, but 31% want more variety. Despite this satisfaction, common misconceptions persist, with concerns about potential quality loss during freezing.

Sustainably sourcing and producing frozen foods is important because it helps protect the environment, supports ethical labour practices, and ensures that resources are used responsibly.

Male 35-44

It is important for frozen foods to be sustainably sourced because it promotes Animal welfare, ensure food safety, reduced carbon footprint, reduce waste.

Male 25-34

Takeaways for the Frozen Sector

1. **Educate consumers:**

   Our data shows that consumers are held back by health-related stereotypes about frozen foods, particularly around additives and preservatives. To uplift the whole industry, we'd recommend showcasing the facts, so consumers can make informed health decisions.

2. **Advocate for portion planning:**

   Most consumers agree that frozen food is a great way to save on food waste (and probably waistlines too). Brands can play into this pre-existing knowledge, with helpful tips about portion control and meal planning.

3. **Prioritise sustainability and affordability:**

   Frozen food brands that can marry sustainability with affordability stand to succeed in this market. This means across every stage - from the origin of the food to the choice of packaging.

4. **Space-saving initiatives:**

   Given that freezer space is the top blocker for 85% of consumers, brands could explore ways to free up space, such as offering incentives or space-efficient portion sizes.

5. **Power-up promotions:**

   This consumer group is price sensitive, and almost all of them (94%) pick up sales items from the frozen section. Brands that tap into this with tempting offers could benefit, especially over festive seasons. But they should be wary not to exceed available freezer space.

6. **Highlight convenience:**

   Consumers love convenience, and this is one of the main appeals of frozen foods. Emphasising this across promotions online and in-store could help to reignite sales.

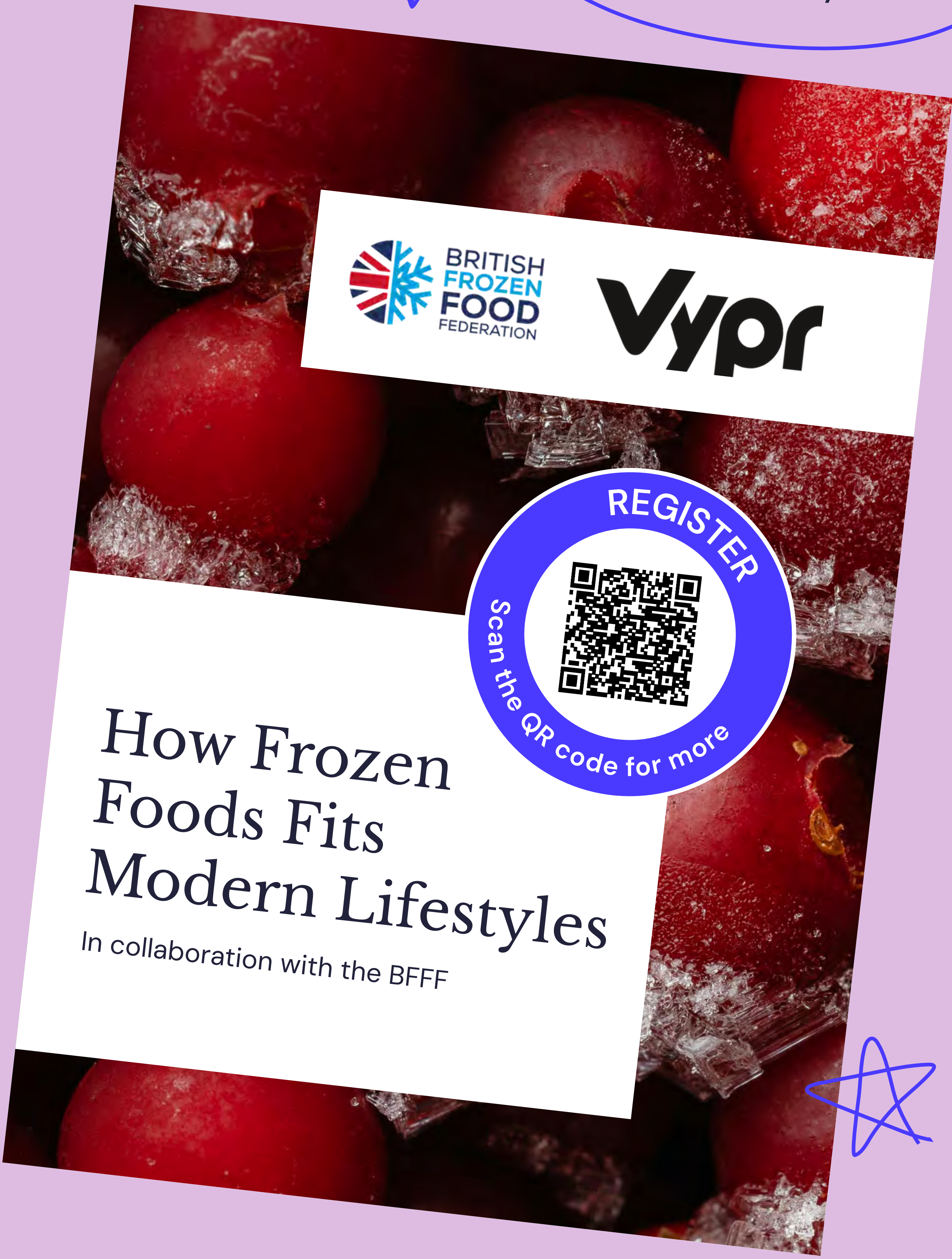
In Summary

Consumer preferences in the frozen food sector are shifting, driven by growing awareness of health, sustainability, and convenience. Shoppers are increasingly recognising the nutritional quality of frozen products and looking for options that align with their values. There's a clear demand for eco-friendly practices, from sourcing and production to packaging, and consumers are willing to pay more for sustainably produced options.

Despite these positive trends, barriers remain. Misconceptions about additives and processing persist, and freezer space limitations still hold many consumers back. Education and innovation will be key to overcoming these challenges, especially when paired with strategies like improved packaging and promotions that meet price-sensitive demands.

As brands navigate these changes, aligning with consumer priorities offers significant opportunities to grow loyalty and build trust. By helping shoppers balance affordability, health, and sustainability, the frozen food industry can lead the way in meeting evolving needs and expectations.

Free Webinar on 25th February 11am



Partner with Vypr to Lead the Market

Now is the time to act on these insights.

As you shape your strategies for the coming year, consider how Vypr's **data-driven approach can support your business in staying ahead of the curve with vast insights and product intelligence.** Whether it's through refining your product offerings, enhancing customer engagement, or driving sustainable practices, the actionable insights Vypr can provide can empower you to make informed decisions that resonate with today's consumers.

Don't just react to change—lead it. Contact us today to learn how Vypr's global intelligence platform can help your brand navigate the future of retail with confidence and success. Together, we can shape the industry's future, one insight at a time.

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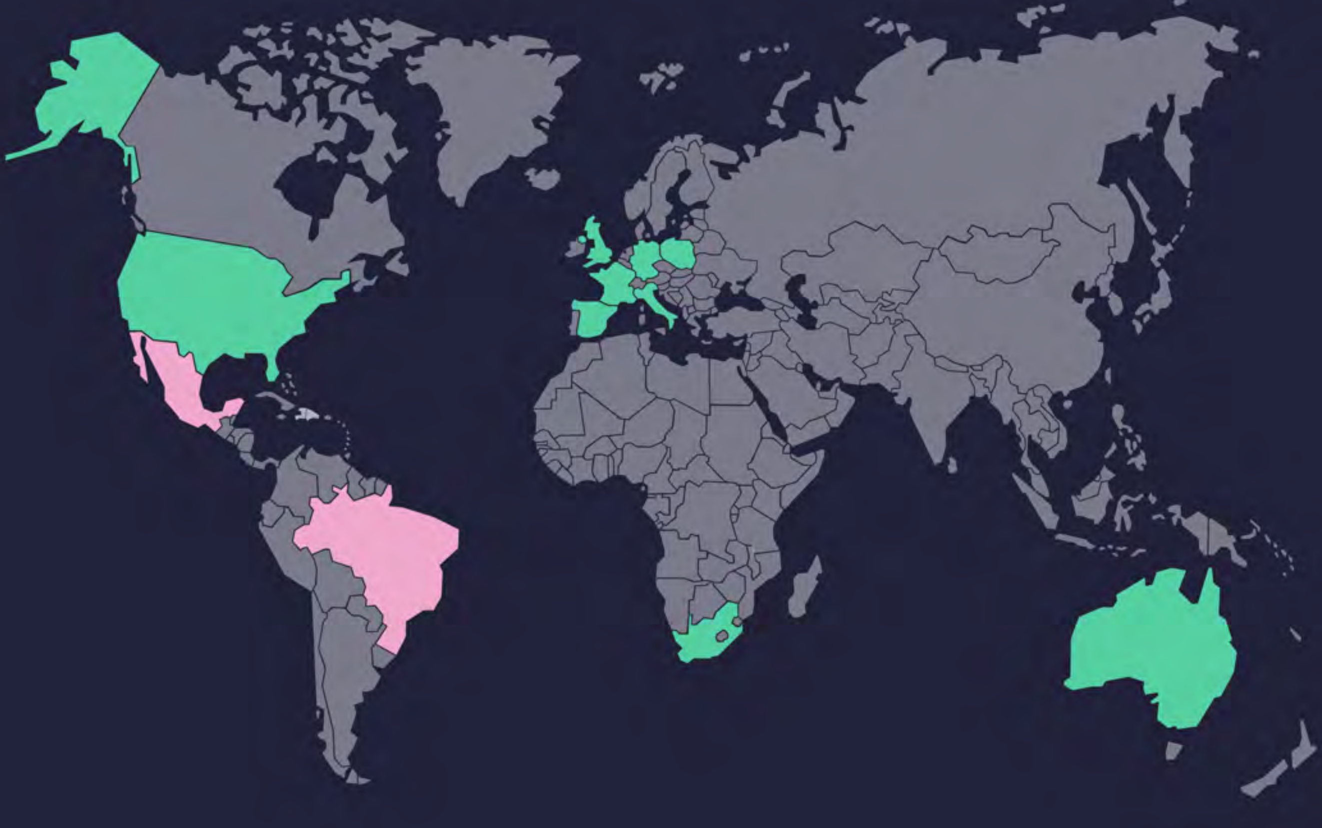

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