



AFFI Invites a Fresh Perspective on Frozen Foods **February 2006**

Overview: Fresh Look Initiative

The American Frozen Food Institute (AFFI) will employ an association-wide effort to promote the frozen food category's innovations and long-standing benefits. AFFI's **Fresh Look Initiative** is an opinion research and communications campaign. It will serve as an umbrella for AFFI's outreach to consumers, the retail and foodservice trades, the media, opinion leaders and government. AFFI also will utilize the **Fresh Look Initiative** to advance its brand within the industry, and to maximize awareness of the ways in which AFFI's category promotion can benefit member companies.



The first phase of the **Fresh Look Initiative** includes the release of new opinion research, and the fashioning and communication of messages according to lessons learned through the research. The primary message of the **Fresh Look Initiative** is that today's frozen food products are better than ever before. AFFI's research indicates this message is credible because it rings true with consumers' personal experiences with improvements in frozen foods. Research also suggests that this approach is applicable to products throughout the frozen food category.

From this foundation, AFFI will communicate story lines related to specific frozen food attributes. These story lines will reinforce messages that enjoy substantial acceptance, such as the comparable, if not superior, nutritional profile of frozen produce when compared with that of raw produce. These story lines also will introduce new concepts on which significant education is needed, including broader reliance on frozen food products among leading chefs and the potential for freezing to be used more reliably as a food safety technology.

Building on AFFI's Category Promotion Success

While the launch of the **Fresh Look Initiative** provides enhanced focus, AFFI's commitment to category promotion is not new. AFFI brings a holistic and creative approach to category promotion that incorporates public relations and government affairs.

Notable recent successes include the following:

- On November 10, 2005, President George W. Bush signed into law the 2006 Agriculture Appropriations Bill (H.R. 2744), which includes language advocated by AFFI that encourages the U.S. Department of Agriculture's Cooperative State

Research, Education, and Extension Service to “consider priority projects that enhance the microbiological safety of food through freezing.” This followed AFFI’s aggressive promotion of a scientific article by Douglas Archer, Ph.D., “Freezing: An underutilized food safety technology?” published in the January 15, 2004, *International Journal of Food Microbiology*.

- During the 2005 National Restaurant Association Restaurant, Hotel-Motel Show, AFFI launched the first Frozen Food Pavilion, titled “Your Quality Connection.” The Pavilion featured exhibits from AFFI member companies and category promotional information. AFFI will present the Pavilion again in May 2006.
- On June 30, 2004, President George W. Bush signed into law the *Child Nutrition and WIC Reauthorization Act of 2004*, which includes the following language advocated by AFFI: “While there is considerable support for the availability of more fresh produce in schools, the Committee recognizes that frozen and canned fruits and vegetables also have value. Unless otherwise modified, the term fruits and vegetables encompass those commodities whether fresh, frozen or canned. On March 25, 1998, the Food and Drug Administration (FDA) acknowledged in the *Federal Register* its conclusion that frozen fruits and vegetables are nutritionally comparable to raw fruits and vegetables and can be used interchangeably in the diet. Overall, processed fruits and vegetables do not lose nutritional value, are cost-effective, convenient for schools, and are preferred in some cases by children. Additionally, it is widely accepted that the freezing and canning processes inhibit the growth of some pathogens and therefore reduce the likelihood of serving contaminated products.”

AFFI’s promotion of this success was successful in landing a quote by AFFI President and Chief Executive Officer Leslie G. Sarasin in the July 12, 2004, edition of *Time* magazine.

- On January 30, 2004, nutrition expert Joy Bauer, MS, RD, CDN, conducted a 17-city satellite media tour to announce her Frozen Food Meal Plan, a nine-day menu planner consisting entirely of frozen food products that meets the daily nutrition requirements at three caloric levels.
- On September 8, 2003, AFFI hosted the Chef Challenge Media Event in New York City. At the event, three respected chefs prepared complete meals with predominantly frozen food ingredients in a 25-minute timeframe. The event served as an opportunity for food reporters from consumer publications to learn more about frozen foods. An independent panel of judges reviewed each of



Nutrition expert Joy Bauer promotes her Frozen Food Meal Plan prepared for AFFI during a satellite TV tour.

the menus and judged the chefs' creations on the attributes of preparation time, taste, convenience, creativity/presentation and nutritional value.

In addition to these recent results, AFFI won a major victory on March 25, 1998, that continues to yield benefits. The U.S. Food and Drug Administration (FDA) approved an AFFI petition to allow frozen produce to be labeled as "healthy," according to the same protocol that applies to raw produce. In FDA's final rule published in the *Federal Register*, the agency wrote, "The nutrient profiles of selected raw fruits and vegetables and frozen, single ingredient versions of the same fruits and vegetables revealed relatively equivalent nutrient profiles ... In fact, some data showed that the nutrient content level for certain nutrients was higher in the frozen version of the food than in the raw version of the food." AFFI converted this ruling into significant media coverage.

AFFI's Opinion Research Identifies Effective Positioning

In 2005, AFFI worked with market research firm Harris Interactive to gauge opinions of the frozen food category and to identify messages that audiences would find persuasive regarding frozen foods' positive attributes.

Specifically, this project involved three research vehicles of Harris Interactive, the quantitative *Congressional Omnibus™* survey and *The Harris Poll™ Online*, as well as the qualitative online *Bulletin Board*. Two online Bulletin Boards were used to gain insights related to perceptions of grocery shopping decision makers. Both of the Bulletin Board sessions included females of at least 24 years of age who were the primary grocery shoppers in the home. One of the Bulletin Board sessions (August 16-18, 2005) included 24 women with no children living in their home at the time, and the other (August 23-25, 2005) included 22 women with children living at home. AFFI twice participated in The Harris Poll Online, in November 2005 and January 2006. The Polls included national samples of 1,718 and 2,985 participants, respectively, weighted demographically to reflect the U.S. population. The Harris Poll Online was used to validate the results of the qualitative Bulletin Boards. The Congressional Omnibus survey (February and March 2005) was used to gauge the opinions of senior Congressional staff, and included 150 telephone interviews.

While the research explored perceived advantages and disadvantages of frozen foods, the main objective of the research was to learn lessons about *how* to talk with key audiences about frozen foods. To this end, AFFI tested several taglines. The results provide insights that should be considered when communicating with consumers.

The following are some of the taglines that were incorporated into the research:

- "Take a Fresh Look at Frozen Foods." (AFFI since has learned that this phrase is a registered mark of a retail company.)
- "Taste What's New in Frozen Foods."
- "Experts Agree, Freezing Locks in Greatness."

- “Freezing: Food’s Fountain of Youth.”
- “Look anew. Think afresh.”
- “Let Frozen Foods Refresh You Today.”

The research indicates that the approach reflected in the lines “Take a Fresh Look at Frozen Foods,” “Taste What’s New in Frozen Foods” and “Let Frozen Foods Refresh You Today” is preferred among the taglines tested. Research participants indicated that this approach:

- Is clear, concise, easy to support and invites action, and does not “overpromise”;
- Is understandable in the suggestion that frozen foods have come a long way in recent years;
- Is believable given individuals’ personal experiences with the products;
- Is effective in creating an interest in learning more about frozen foods; and
- Applies well to products across various segments of the category.

These findings are consistent with the performance of various statements about frozen foods. Participants discussed their reactions to these statements:

- “Many chefs are turning to frozen vegetables for expanded variety all year long.”
- “Often, frozen foods retain nutrients as well as or better than foods that are not frozen.”
- “Freezing is capable of destroying microorganisms and making food safer for consumption.”
- “Frozen foods have come a long way over the past several years, providing better taste and variety to consumers.”

The majority of respondents felt that the statement regarding the advancements in frozen foods was the most believable. Most participants had experienced this personally. The statement regarding the nutritional value of frozen foods skewed toward its being believable, with many participants having heard this before and inclined to believe it. The discussion about chefs’ usage of frozen vegetables led to in-depth discussion about the type of restaurants in which the chefs worked, with most participants believing that high-end restaurants still are likely to opt for raw produce. The statement about the link between freezing and food safety indicated that participants needed to learn much more about this concept before being willing to accept it.

Lessons Learned, Insights Identified

While qualitative research is not meant to deliver statistical results (i.e., percentages of respondents who report beliefs), consensus opinions developed in the *Bulletin Board* discussions can provide useful insights about consumers' perceptions of the frozen food category. The following are among the insights that may be of interest to frozen food processors, suppliers of goods and services to the industry, retailers, and foodservice operators.

Frozen Foods and Perceptions Associated with “Freshness”

It is worth considering participants' discussions on two topics: the ability of the freezing process to “lock in” nutrients and the concept that “freshness” conveys that a product was recently harvested or prepared. Participants generally were familiar with the fact that frozen fruits and vegetables can contain equal, and even higher, levels of certain nutrients than raw produce that has spent the usual time in transit, on store shelves and in home storage. Discussions among participants would seem to indicate that the frozen food industry would do well to emphasize the ability of freezing to lock in nutrients, but to refrain from emphasizing that frozen products can be stored for long periods of time. Participants are most impressed with the ability of freezing to lock in nutrients, to provide variety of products across seasons and to make it easier to maintain products at home. It does not seem to be of primary interest that these products can be stored for an extended time, and emphasizing this fact paradoxically undermines participants' willingness to put frozen products on equal footing with raw products.

Frozen Foods vs. Prepared Foods

Discussions among participants reveal areas of strength for frozen foods compared with prepared refrigerated foods (such as dinners, entrees, pizzas and more) sold at retail. There was consensus that frozen food products provide greater usage flexibility than prepared refrigerated foods, given that there is less pressure to use frozen products right away. Participants also seemed to have greater confidence in the safety of frozen food products compared with refrigerated prepared products, and they specifically noted their sense that it is easier to mishandle refrigerated prepared products. The product information listed on frozen food products also seems to provide participants with greater confidence compared with the information presented on refrigerated prepared products. Advantages for refrigerated prepared products as reported by participants included greater “freshness” and ease of preparation.

Sophistication and Expectations Regarding Frozen Food Handling

In evaluating strengths and weaknesses of frozen food products, participants in the *Bulletin Boards* noted problems with obvious product “thawing and re-freezing” and ice crystals as weaknesses of frozen food products. This would seem to indicate the importance of cold chain integrity as essential for the image of the frozen food category.

Importance of Seeing Before Eating

Also as part of the discussion of frozen food strengths and weaknesses, participants noted the general inability to see frozen foods as they are presented at retail as a barrier to being enticed to try these products.

“Real People” are among the Frozen Food Category’s Best Spokespeople

During the Bulletin Board sessions, AFFI asked participants to view three video segments for the purpose of determining which visuals were most effective in communicating the positive characteristics of frozen foods. AFFI showed participants a television interview with nutrition expert Joy Bauer, MS, RD, CDN, who presented her frozen food meal plan; a radio interview with Douglas Archer, Ph.D., regarding the use of freezing as a food safety technology; and a local news report in which a consumer reporter conducted a taste test of frozen food products.

While participants were interested in the information presented by Joy Bauer and Douglas Archer, consensus emerged that the television news segment was the most effective of these visuals because it featured “real people” who held the opinion that frozen foods have improved in taste and quality in recent years.

Shining the Spotlight on Industry Innovations

AFFI member company representatives that have been instrumental in the development of this research project and the entire Category Promotion Campaign have indicated that encouraging consumers to look again at frozen foods will help draw attention to innovations of member companies. Through media relations, trade relations, government advocacy and other methods of outreach, the Institute can focus constituencies on the real news: extensive efforts of companies that advance the category as they advance their products.

Consistent with this philosophy, AFFI included in its quantitative research several questions related to innovation in the industry. Three questions that were fielded as part of the *Harris Poll™ Online* are as follows:

Question 1: There are a variety of features people look for when purchasing frozen foods for themselves or for their families. Some say they want new frozen food products, while others say they want enhancements or improvements to existing frozen food products. In your opinion, which is most important to you?

- 8% New frozen food products
- 23% Enhancements to existing frozen food products
- 68% Both are equally important

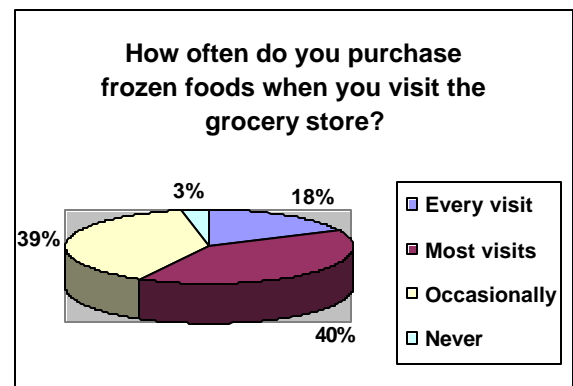
Question 2: In what area do you think the most important frozen food innovations have occurred over the past 10 years or so? Please select only one area.

- 27% Ease of preparation
- 26% Variety
- 22% Taste
- 18% Product performance and quality after preparation
- 7% Nutrition

Question 3: Think about the frozen food product you tried recently for the very first time. What prompted you to try that product? Please select only one.

- 50% Product looked appealing when shopping
- 31% Coupon/Sale item
- 12% Recommendation from another person
- 5% Advertisement
- 1% Read a newspaper story about the product

The survey also included a question to gauge the frequency with which respondents purchase frozen foods. In response to the question “How often do you purchase frozen foods when you visit the grocery store?” 18 percent indicated they do so “every visit”; 40 percent indicated “most visits”; 39 percent indicated “occasionally” and three percent indicated “never.”



Next Steps: Communications

Throughout 2006, AFFI will communicate aggressively based on the findings of the initial research project of the **Fresh Look Initiative**. The **Fresh Look Initiative** will provide a focus that ensures every aspect of the Institute fosters a fresh perspective of frozen foods among key audiences.

Over the course of several months, AFFI will release through the media specific elements of the research findings. AFFI also will communicate its strategic messages through several key events. For example, AFFI will coordinate a March 8, 2006, Congressional briefing presented by the Frozen Food Caucuses in the U.S. House of Representatives and Senate. AFFI also will incorporate relevant messages into its Frozen Food Pavilion at the 2006 National Restaurant Association Restaurant, Hotel-Motel Show in May 2006.

More information is available online at www.affi.com.