

**BFFF Frozen Food
Research
Summary Report
February 2011**



Calling Base

CaterBase was used to identify outlets in the following sector that could be contacted and asked to take part in a study to gain an insight and understanding of the markets views on frozen food products

Surveys were conducted with 105 outlets broken down as follows;

Main Function	Independent	Public Sector	Group Site	TOTAL	
Business & Industry			12	12	11.4%
Hotel	16		6	22	21.0%
NHS Trust		13		13	12.4%
Pub/Bar	23		7	30	28.6%
Restaurant	11		4	15	14.3%
State Secondary School		7		7	6.7%
University		6		6	5.7%
TOTAL	50	26	29	105	100.0%



Q1 Do you stock frozen food in your establishment?

Main Function	Always		Never		Occasionally		TOTAL
Business & Industry	11	91.7%		0.0%	1	8.3%	12
Café	1	100.0%		0.0%		0.0%	1
Hotel	18	81.8%		0.0%	4	18.2%	22
NHS Trust	13	100.0%		0.0%		0.0%	13
Pub/Bar	19	63.3%	1	3.3%	10	33.3%	30
Restaurant	7	50.0%	2	14.3%	5	35.7%	14
State Secondary School	7	100.0%		0.0%		0.0%	7
University	6	100.0%		0.0%		0.0%	6
TOTAL	82	78.1%	3	2.9%	20	19.0%	105



Q2 How often do you use frozen food within your establishment?

Main Function	Every day		Every week		Never		Occasionally		TOTAL
Business & Industry	9	75.0%	1	8.3%			2	16.7%	12
Hotel	16	72.7%	2	9.1%			4	18.2%	22
NHS Trust	12	92.3%	1	7.7%					13
Pub/Bar	20	66.7%	5	16.7%	1	3.3%	4	13.3%	30
Restaurant	5	33.3%	5	33.3%	2	13.3%	3	20.0%	15
State Secondary School	5	71.4%	2	28.6%					7
University	5	83.3%	1	16.7%					6
TOTAL	72	68.6%	17	16.2%	3	2.9%	13	12.4%	105



Q3 Please list the types of frozen you use?

Only asked to those that answered 'yes' at Q2

Main Function	Don't use Whole Meals		Use Whole Meals		Never use Frozen		TOTAL
Business & Industry	12	100.0%					12
Hotel	22	100.0%					22
NHS Trust	13	100.0%					13
Pub/Bar	23	76.7%	6	20.0%	1	3.3%	30
Restaurant	13	86.7%			2	13.3%	15
State Secondary School	7	100.0%					7
University	6	100.0%					6
TOTAL	96	91.4%	6	200.0%	3	2.9%	105

Main Function	Don't use Meal Components		Use Meal Components		Never use Frozen		TOTAL
Business & Industry		0.0%	12				12
Hotel	2	9.1%	20				22
NHS Trust	1	7.7%	12				13
Pub/Bar		0.0%	29	96.7%	1	3.3%	30
Restaurant	1	6.7%	12		2	13.3%	15
State Secondary School		0.0%	7				7
University	1	16.7%	5				6
TOTAL	5	4.8%	97	92.4%	3	2.9%	105

Main Function	Don't use Single Dish Ingredients		Use Single Dish Components		Never use Frozen		TOTAL
Business & Industry	1	8.3%	11				12
Hotel	9	40.9%	13				22
NHS Trust		0.0%	13				13
Pub/Bar	10	33.3%	19	63.3%	1	3.3%	30
Restaurant	6	40.0%	7		2	13.3%	15
State Secondary School	2	28.6%	5				7
University		0.0%	6				6
TOTAL	28	26.7%	74	70.5%	3	2.9%	105



Q3 Please list the types of frozen you use?

Whole Meal Examples	Count
Fish Pie	1
Chilli	1
Vegetarian Meals	2
Desserts	1
Lasagne	1

Meal Component Examples	Count
Bacon	2
Bread	42
Burgers	2
Chicken	4
Chicken nuggets	2
Chips	27
Cod	1
Desserts	2
Diced chicken	1
Diced meat	1
Fish	18
Fish Bread	1
Fish fingers	1
Garlic mushrooms	1
Ice Cream	3
Meat	8
Onion Rings	2
Panini	1
Pasties	4
Pastries	2
Pastry	23
Peas	1
Pies	4
Pizza	4
Potato w edges	2
Praw ns	4
Purees	1
Quorn	1
Samosa	1
Sausage rolls	1
Sausages	6
Savoury pies	1
Scampi	18
Steak	1
White bait	1
Yorkshire Pudding	2

Single Dish Examples	Count
Bread	1
Calamari	1
Chips	2
Onion Bhaji	1
Peas	4
Praw ns	1
Seafood	1
Sponges	1
Vegetables	66



Q4 Do you agree with the following statements about frozen - regarding quality?

5 is agree strongly and 1 is strongly disagree;

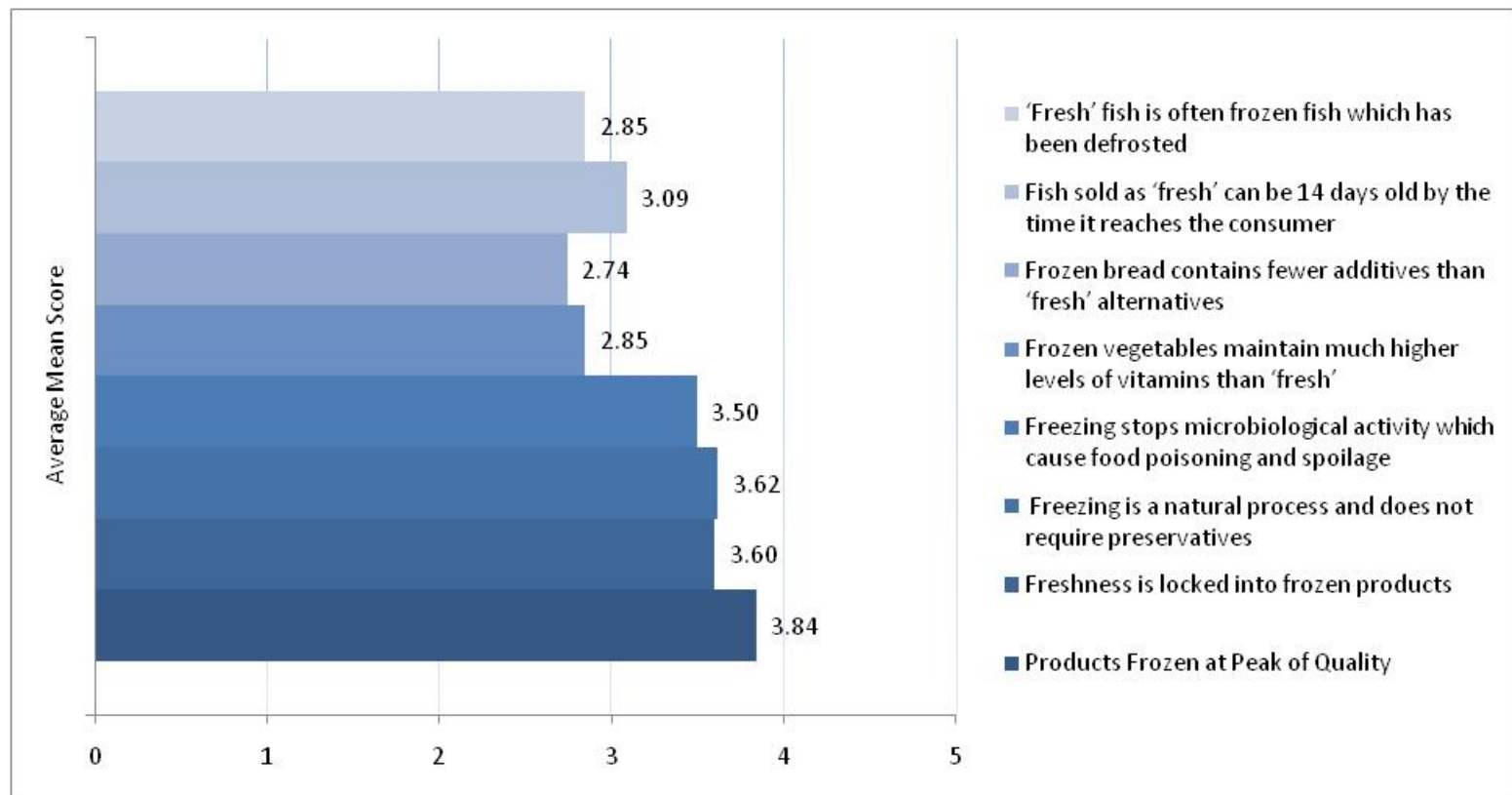
Question	Score 1		Score 2		Score 3		Score 4		Score 5	
Products Frozen at Peak of Quality	2	1.9%	5	4.8%	24	22.9%	51	48.6%	23	21.9%
Freshness is locked into frozen products	2	1.9%	14	13.3%	23	21.9%	51	48.6%	15	14.3%
Freezing is a natural process and does not require preservatives	1	1.0%	13	12.4%	27	25.7%	48	45.7%	16	15.2%
Freezing stops microbiological activity which cause food poisoning and spoilage	8	7.6%	18	17.1%	15	14.3%	42	40.0%	22	21.0%
Frozen vegetables maintain much higher levels of vitamins than 'fresh'	0	0.0%	42	40.0%	20	19.0%	24	22.9%	10	9.5%
Frozen bread contains fewer additives than 'fresh' alternatives	9	8.6%	26	24.8%	54	51.4%	15	14.3%	1	1.0%
Fish sold as 'fresh' can be 14 days old by the time it reaches the consumer	9	8.6%	22	21.0%	32	30.5%	35	33.3%	7	6.7%
'Fresh' fish is often frozen fish which has been defrosted	15	14.3%	31	29.5%	19	18.1%	35	33.3%	5	4.8%



Q4 Do you agree with the following statements about frozen - regarding quality?

Average 'Mean' Score;

5 is agree strongly and 1 is strongly disagree;



Q5 Do you agree with the following statements about frozen - regarding prices and availability ?

5 is agree strongly and 1 is strongly disagree;

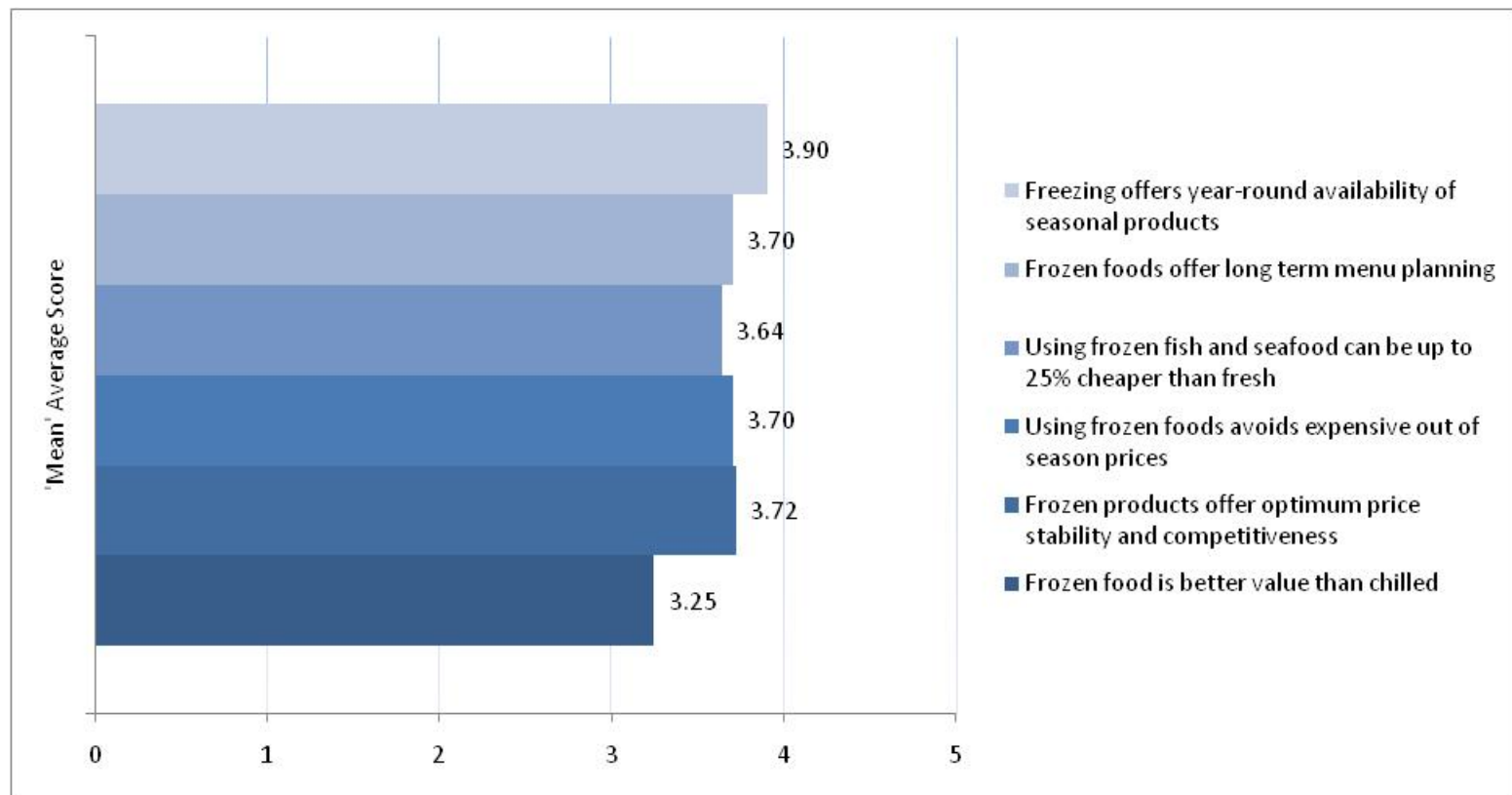
Question	Score 1		Score 2		Score 3		Score 4		Score 5	
Frozen food is better value than chilled	4	3.8%	23	21.9%	29	27.6%	41	39.0%	8	7.6%
Frozen products offer optimum price stability and competitiveness	1	1.0%	8	7.6%	22	21.0%	62	59.0%	12	11.4%
Using frozen foods avoids expensive out of season prices	1	1.0%	11	10.5%	19	18.1%	58	55.2%	16	15.2%
Using frozen fish and seafood can be up to 25% cheaper than fresh	1	1.0%	11	10.5%	27	25.7%	52	49.5%	14	13.3%
Frozen foods offer long term menu planning	2	1.9%	13	12.4%	12	11.4%	62	59.0%	16	15.2%
Freezing offers year-round availability of seasonal products	3	2.9%	6	5.7%	8	7.6%	69	65.7%	19	18.1%



Q5 Do you agree with the following statements about frozen - regarding prices and availability ?

Average 'Mean' Score;

5 is agree strongly and 1 is strongly disagree;



Q6 Do you agree with the following statements about frozen - regarding food waste?

5 is agree strongly and 1 is strongly disagree;

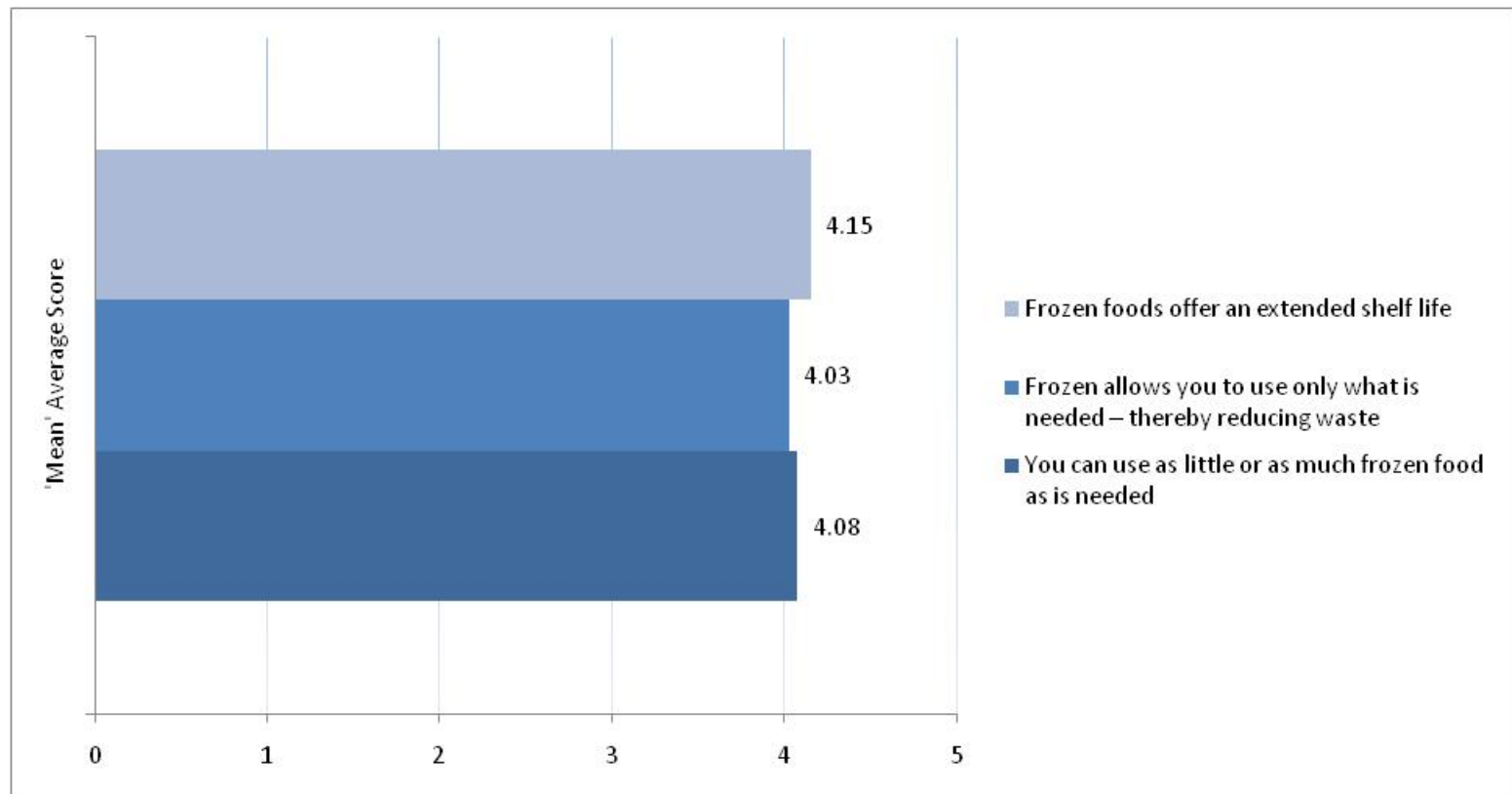
Question	Score 1		Score 2		Score 3		Score 4		Score 5	
You can use as little or as much frozen food as is needed	0	0.0%	5	4.8%	7	6.7%	68	64.8%	25	23.8%
Frozen allow s you to use only w hat is needed – thereby reducing w aste	0	0.0%	6	5.7%	9	8.6%	66	62.9%	23	21.9%
Frozen foods offer an extended shelf life	1	1.0%	0	0.0%	7	6.7%	68	64.8%	29	27.6%



Q6 Do you agree with the following statements about frozen - regarding food waste?

Average 'Mean' Score:

5 is agree strongly and 1 is strongly disagree;



Q7 Thinking about your position as a chef, do you agree with the following statements ?

5 is agree strongly and 1 is strongly disagree;

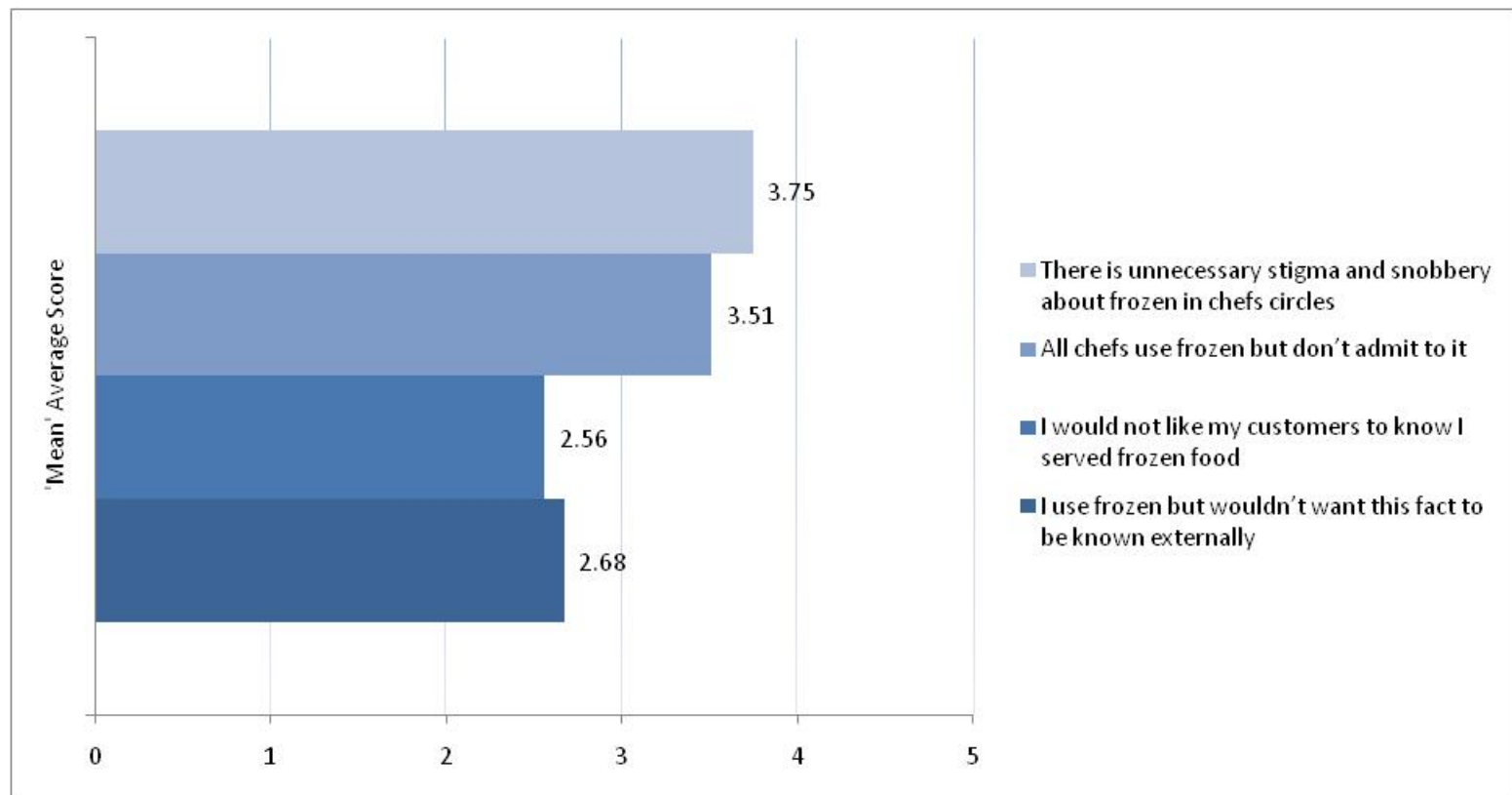
Question	Score 1		Score 2		Score 3		Score 4		Score 5	
I use frozen but wouldn't want this fact to be known externally	7	6.7%	49	46.7%	22	21.0%	25	23.8%	2	1.9%
I would not like my customers to know I served frozen food	5	4.8%	56	53.3%	25	23.8%	18	17.1%	1	1.0%
All chefs use frozen but don't admit to it	4	3.8%	15	14.3%	18	17.1%	59	56.2%	9	8.6%
There is unnecessary stigma and snobbery about frozen in chefs circles	2	1.9%	11	10.5%	15	14.3%	60	57.1%	17	16.2%



Q7 Thinking about your position as a chef, do you agree with the following statements ?

Average 'Mean' Score;

5 is agree strongly and 1 is strongly disagree;



Q8 Thinking about the next 12 months, are you planning to do any of the following?

Use more frozen foods to reduce direct costs;

Main Function	No		Yes		TOTAL
Business & Industry	10	83.3%	2	16.7%	12
Hotel	18	81.8%	4	18.2%	22
NHS Trust	11	84.6%	2	15.4%	13
Pub/Bar	25	83.3%	5	16.7%	30
Restaurant	13	86.7%	2	13.3%	15
State Secondary School	6	85.7%	1	14.3%	7
University	5	83.3%	1	16.7%	6
TOTAL	88	83.8%	17	16.2%	105

Use more frozen as the quality is better than ever;

Main Function	No		Yes		TOTAL
Business & Industry	9	75.0%	3	25.0%	12
Hotel	17	77.3%	5	22.7%	22
NHS Trust	8	61.5%	5	38.5%	13
Pub/Bar	25	83.3%	5	16.7%	30
Restaurant	12	80.0%	3	20.0%	15
State Secondary School	6	85.7%	1	14.3%	7
University	5	83.3%	1	16.7%	6
TOTAL	82	78.1%	23	21.9%	105



Q9 Looking to the future, which specific frozen foods would you like to see improved in quality?

Suggestion	Count	%
All products	1	1.0%
Beef burgers	1	1.0%
Bread	3	2.9%
Broccoli	1	1.0%
Brussels sprouts	1	1.0%
Burgers	1	1.0%
Chicken Nuggets	1	1.0%
Chips	2	1.9%
Desserts	1	1.0%
Diced lamb/beef	1	1.0%
Fish	5	4.8%
Green beans	2	1.9%
Mixed vegetable packs	1	1.0%
Pasta meals	1	1.0%
Ready meals	4	3.8%
Roast potatoes	1	1.0%
Savoury Pies	1	1.0%
Soft fruit	1	1.0%
Soups	1	1.0%
Suet Pudding	1	1.0%
Vegetables	7	6.7%
White Bait	1	1.0%



Q10 Looking to the future, which types of foods would you like to see supplied in a frozen format?

Suggestion	Count	%
Asparagus	1	1.0%
Baked Goods	1	1.0%
Starters	1	1.0%
Wider range of fish	1	1.0%

