

CREATING FRESH

Putting consumer perceptions of freshness to work

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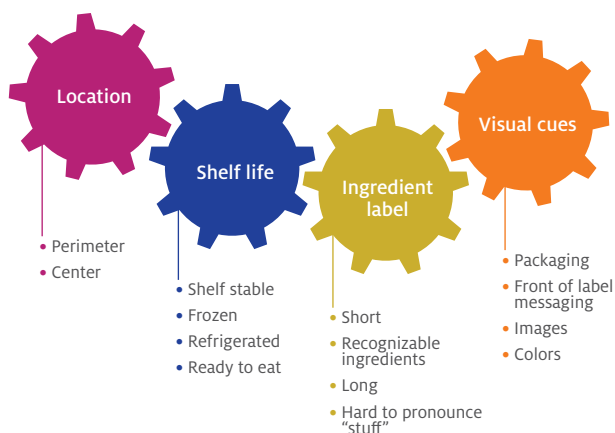
Creating FRESH: Putting consumer perceptions of freshness to work

Product freshness is a perception that does not stem from a single property of, or communication about a product, but from input from multiple sensory cues. Not all retail products are perceived the same by consumers. But consumer perceptions of freshness can be fluid and influenced by concepts ranging from ingredients to messaging, claims and packaging. By working closely with ingredient manufacturers and food technology innovation experts, and taking a proactive approach to product development that targets the multiple facets of fresh perception, product developers can build a stronger reputation for their prepared food products while enticing consumers and satisfying their desire for fresher products with cleaner labels.

Consumers “eat with their eyes” first

Consumers “eat with their eyes” first, but beauty isn’t the only thing that attracts. It is part of the overall impression the consumer absorbs before committing decisively to an action, such as buying a food or eating it. That’s where perceptions of freshness come in. The consumer’s initial impressions of how fresh the food or beverage product will be, and taste, is assessed nearly instantaneously, and is based on multiple inputs. These include the initial visual impressions, followed by the tactile and closer visual inspection of written claims, labeling, and ingredients. Each one of these intersection points offers an opportunity to engage the consumer in making a positive decision about the product in hand by adept usage of her or his perceptions of freshness (*figure 1*).

FIGURE 1: Freshness has many different meanings and is mainly driven by consumer perception. Consumers look at everything about a product when determining freshness:



The perception of “freshness”

While the inseparable and fundamental nature of visual input in perceptions of food desirability — including freshness — have been described in great physiological detail by a number of researchers, for example recently by Zampini & Spence (“Assessing the Role of Visual and Auditory Cues” in *The Neural Bases of Multisensory Processes*, 2012), consumer knowledge and expectations have increased markedly in the Information Age as multiple streams of input and information are available both actively and passively. Consumers are changing the landscape of today’s retail. They are using their knowledge and perceptions to seek products they believe are “fresher,” “simpler,” and “better” for them.

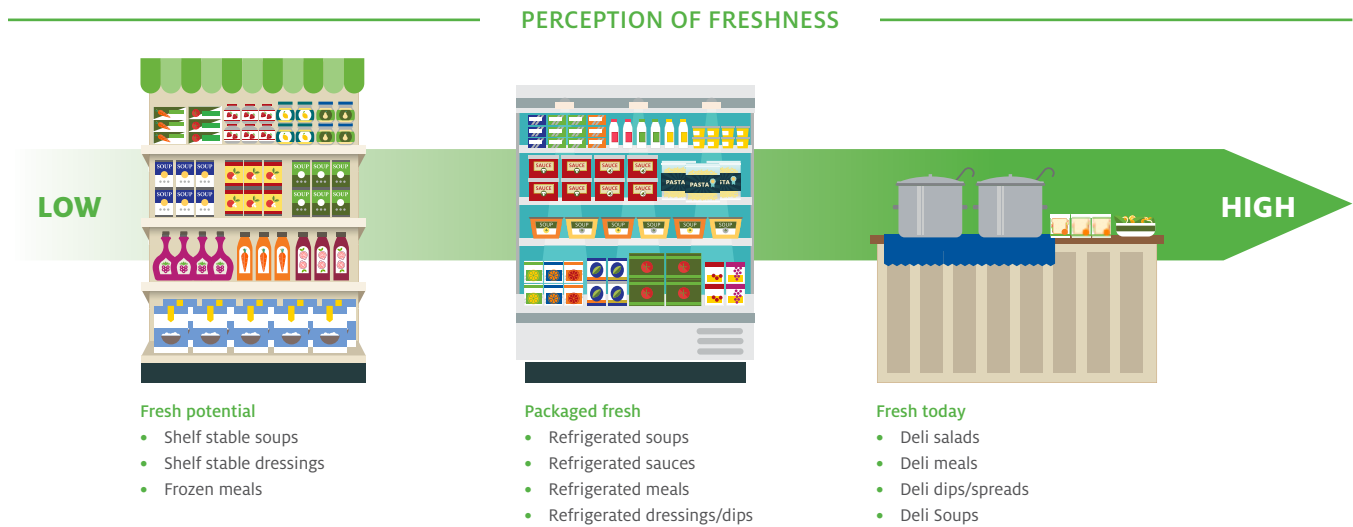
One result of movement toward fresher products is that the perimeter of the store — not just produce but refrigerated products, such as soups, sauces, dressings and dips, and RTE (ready-to-eat) meals and even deli products — are stealing shares from the center of the store, where processed and packaged foods reside. In 2015, U.S. grocery sales totaled nearly \$640 billion and, in the next five years, are expected to surpass \$720 billion, an increase of 14%. However, sales at the perimeter of the store are forecasted to make up about half of that amount, increasing nearly 17%.²

What is “FRESH?”

Freshness is an understanding that, as supported by research, is influenced by product placement, position, form, visual cues, and experience. Categories naturally associated with freshness are located along the perimeter of the store, including the deli. For example, deli soups, sauces and ready meals are universally seen as fresh, while, according to qualitative and quantitative research conducted by Ingredient, the same categories within the refrigerated perimeter of the store are considered to be less fresh in the scale of perception of freshness and therefore called by consumers as “packaged fresh.”

Ingredient’s research confirmed that consumers expect fresher foods to be minimally processed, with fewer and cleaner ingredients. Shoppers are looking for transparency and simple ingredients they recognize. This trend is indicative of how today’s consumers are reshaping the landscape of the food industry and moving away from the center of the store while seeking out “fresher” foods (*figure 2*).

FIGURE 2: Here's how we categorize products along the fresh continuum



While some products might not be initially considered as fresh, their use in developing an at home meal solution that is “made at home” can allow these products to be perceived as fresh.

When needed, visual cues such as packaging, messaging and graphics are required to confirm or convince shoppers about the “freshness.” Key to this is the ability to see the product and to rely on other visual information – ingredient list, nutritional label – that aid in the understanding of the product to drive the decisions of both purchase and enjoyment. These characteristics are a significant part of what conveys if a product is perceived as fresh or not. These are the elements that allow consumers to distinguish between products that are considered as “fresh” vs. “packaged fresh” vs. “potential fresh.”

Buying into “FRESH”

Consumers take a holistic approach to a product when determining freshness. In addition to the location the item holds in the store, they pay attention to the ingredient labels and product claims. They especially seek short labels with recognizable ingredients as opposed to a long list of ingredients that are unfamiliar and hard-to-pronounce. Adjunct to labeling is information about the shelf life of the product, including whether the item is frozen, shelf-stable, refrigerated, or ready-to-eat. Consumers gain this and other information such as messaging via visual cues from packaging, including front-of-the-label claims and images. An example would be the perception of freshness in soup products. A canned product with a long shelf life, limited product description, homogeneous texture and

lengthy ingredient label wouldn’t necessarily fall into a “fresh” category.

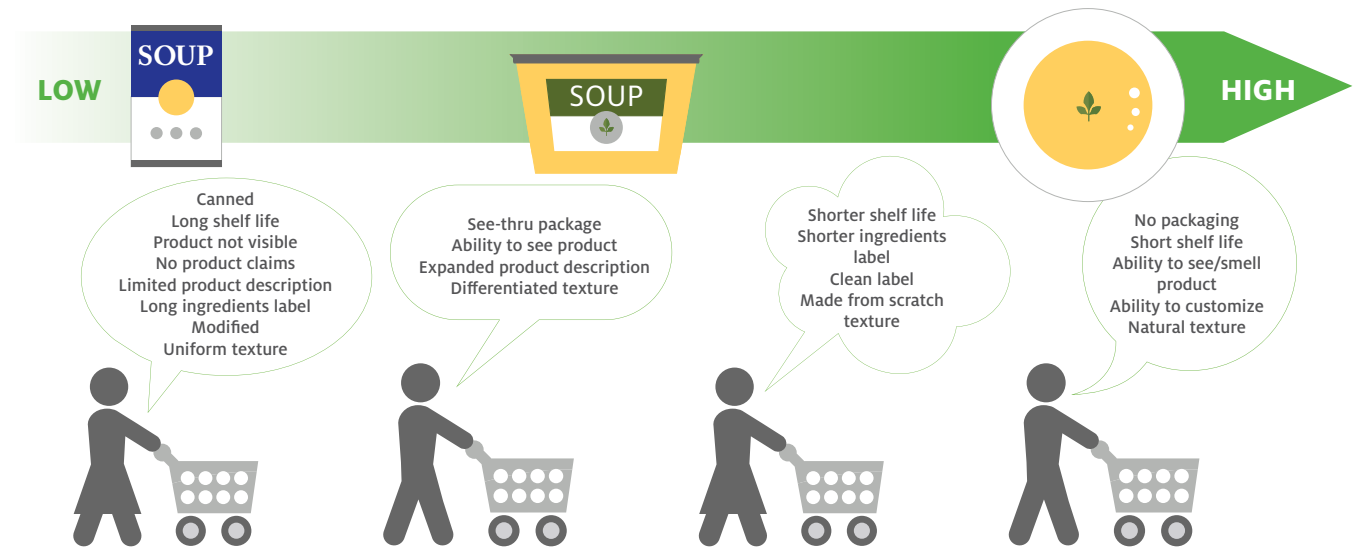
Nevertheless, moving along the ‘fresh continuum’, a shelf-stable soup in a see-through container, with a simpler ingredient label, a window panel that allows consumer visual evaluation of the product and its texture — usually ‘chunkier’ will have a “fresher” perception. This also holds true for the refrigerated product which is typically packaged in a see-through container, which allow consumers to view the product and evaluate its “home-style” type of texture.

At the top level of freshness along this soup spectrum, the deli-fresh, in-store prepared soup meets the highest standard of freshness. The consumer usually reviews the packaging after visually inspecting the product and partaking of its aroma while assessing its “made from scratch” texture. In this case, product ingredients and label becomes secondary. However today’s consumers are seeking the products with highest freshness and cleanest ingredients and labels (*figure 3*).

To be successful in today’s market, the key is to reach an optimum combination of product freshness with support from product claims, cleaner labels and packaging. According to Ingredion’s research³, shelf-stable soups, dressings, and frozen meals were perceived as having “fresh potential,” while deli salads, meals, dips and spreads, and soups had a “fresh today” perception. Packaged fresh foods, such as refrigerated soups, sauces, meals, and dressings and dips provide a combination of fresh perception and convenience that serves the multiple and complex needs of today’s consumer.

FIGURE 3:

PERCEPTION OF FRESHNESS



Creating FRESH: Progressing along the FRESH continuum

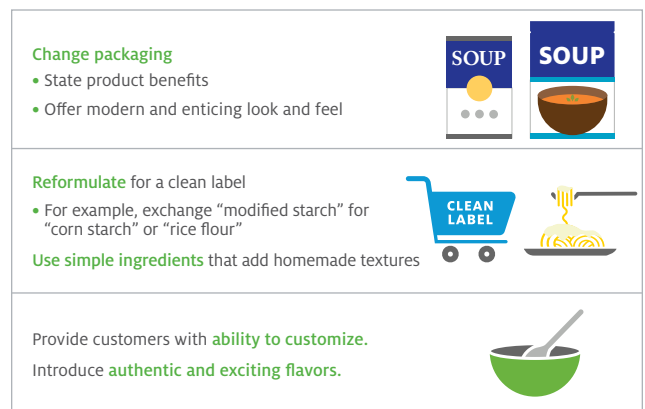
For processors with product found in the center of the store, it's possible to improve the fresh perception for greater appeal and profitability. First, a change of packaging to offer a more modern and enticing look and feel — and that allows a clearer statement of product benefits — can convey the desired message of increased freshness to the consumer.

Second, reformulating for a clean label, by using simple ingredients that add homemade textures, can “boost the fresh appeal.” For example, using simple functional ingredients and calling them out on the label as such. Case in point: reformulating “modified starch” to other ingredients such as “corn starch,” “rice flour,” etc. Cleaner labels with cleaner perception and description imply fresher flavors and textures (figure 4).

Working with suppliers such as Ingredion, and taking advantage of Ingredion Idea Labs™ state-of-the-art innovation research facilities and services, coupled with proprietary qualitative and quantitative consumer research about “freshness,” helps product developers get the benefit of broad expertise and capabilities to help stay ahead of the curve in the rapidly expanding fresh phenomenon. By applying truly novel solutions, including patented clean label ingredients, and technologies, developers working in tandem with expert food scientists and ingredient technologists can achieve cleaner label foods that also have great shelf life and stability, all while expressing the multiple qualities of freshness.

When developers work with the Ingredion team, they get cutting-edge, science-based insight into how sensory attributes influence consumers’ perception of freshness. And through Ingredion’s CULINOLOGY® expertise, product designers can develop chef-inspired products with clean labels and fresh appeal.

FIGURE 4:



References

Freshen up: The latest research on the fresh phenomenon; Ingredion Inc., May, 2016.

1. Zampini, M. & Spence, C. (2012) Assessing the Role of Visual and Auditory Cues in Micah M. Murray and Mark T. Wallace *The Neural Bases of Multisensory Processes* (chapter 37). Boca Raton (FL): CRC Press/Taylor & Francis.
2. Center of the Store, Mintel US, January 2016, Grocery Retailing, Mintel, US November 2015.

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