Food Standards Scotland
Inbhe Bìdh Alba

Exploring the impact of COVID-19 on retail purchase and price promotion in Scotland: 2019-2020

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1. About Food Standards Scotland

Food Standards Scotland (FSS) is the public sector food body for Scotland. We are here to ensure that information and advice on food safety and standards, nutrition and labelling is independent, consistent, evidence-based and consumer-focused.

Our primary concern is consumer protection – making sure that food is safe to eat, ensuring consumers know what they are eating and improving nutrition. With that in mind, our vision is to deliver a food and drink environment in Scotland that benefits, protects and is trusted by consumers.

FSS was established by the Food (Scotland) Act 2015 as a non-ministerial office, part of the Scottish Administration, alongside but separate from the Scottish Government. We are mainly funded by the government but we also charge fees to recover costs for regulatory functions.

See more at: **foodstandards.gov.scot/about-us**

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2. Glossary and definitions

Term	Definition
Take home (retail) food and drink purchase	All food and drink purchased for use within the home, i.e. all grocery shopping. This definition excludes takeaway (including home-delivered takeaway food) and any foods that were purchased for immediate consumption outside the home such as a sandwich purchased at a supermarket, or a meal ordered within a restaurant.
Nutritional volume	Calculation of nutrients requires a measure of quantity. In most cases the nutritional volume is kilograms or litres. However, for some categories (loose products like cakes, pastries, morning goods and eggs) where pack weights are not available, volume is expressed as number of servings or packs. For the purpose of this report nutritional volume is referred to as volume in the narrative.
Total sugars	Includes sugars naturally present in foods such as fruit, vegetables and cereals, in addition to lactose found in milk products, and any added sugars.
Ambient	Food and drink which can be stored at room temperature.
Price promotions:	This includes:
Temporary price reduction	*A temporary reduction in the cost of a product, e.g. 10% off.*
Y for £X	*An offer of buying a set number of products for a set price, e.g. 2 for £2.*
Multi-buy	*Including buy one get one free (BOGOF) and 3 for 2 offers.*
Price-marked packs (PMP)	*Products which include price information as part of the package design.*
Other promotions	*Includes extra free deals, meal deals, free gifts and samples.*
Market share (volume)	Within this report, the term 'market share' refers to the proportion of total food and drink volume purchased from a particular retailer.
Social class	National Readership Survey (NRS) social grade classification system includes:
A	Higher managerial, administrative and professional.
B	Intermediate managerial, administrative and professional.
C1	Supervisory, clerical and junior managerial, administrative and professional.
C2	Skilled manual workers.
D	Semi-skilled and unskilled manual workers.
E	State pensioners, casual and lowest grade workers, unemployed with state benefits only.
Discretionary food and drink	Items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, which aren't required for our health.
Out of Home (OOH)	Any food or drink purchased for consumption away from home, including food 'on the go' and deliveries and takeaways.
Online shopping occasion	An online retail shop delivered to home.
Trip	A 'trip' includes in-store retail purchasing occasions and online shopping occasions.
Per capita	Per person.

Acronyms

Acronym	Expression
FSS	Food Standards Scotland.
BOGOF	Buy one get one free.
Kcal	Kilocalorie, commonly referred to as a calorie.
OOH	Out of home.
PMP	Price-marked packs.
TPR	Temporary price reduction.

3. Executive summary

This report updates previous key **findings** on the impact of the COVID-19 pandemic during 2020 on retail food and drink purchased into the home, in Scotland, compared to 2019. Using data from Kantar, it provides further insights into price promotions, purchase by social class and online grocery delivery.

The data presented within this report does not include food and drink purchased Out of Home (OOH), and it is important to note that this sector was significantly impacted by COVID-19 restrictions during 2020. For further detail on this impact, please refer to the recent FSS report.[1]

3.1 Overview of the retail food and drink landscape in Scotland

Households in Scotland purchased 8.2% more food and drink into the home during 2020, compared to 2019. This is despite a decrease (-8.6%) in the overall number of trips (including online shopping occasions) that people made to the retail environment during this time. The greatest difference was observed during week 4 of March 2020, the week before the first national lockdown was announced, when 40.1% more food and drink was purchased into the home, compared to the same week in 2019. During this time the number of trips was 43.0% higher compared to 2019.

Overall, a total of £10.4 billion was spent on take home retail food and drink in Scotland in 2020, which was 12.6% (£1.1 billion) greater than in 2019. In line with the increase in volume purchased, the greatest percentage increase in spend was also observed the week immediately before the first national lockdown in 2020, and was 53.7% greater in 2020 compared to the same week in 2019.

People in Scotland also changed the way in which they shopped for food and drink during the COVID-19 pandemic. Online shopping occasions increased substantially from April 2020 onwards, resulting in an overall increase of 78.8% in 2020, compared to 2019.

Despite fluctuations on a monthly basis throughout 2020, there were only small changes in retailer share of the volume of food and drink purchased into the home. Discounters saw an increase (2.2%) in their share of volume, whilst supermarkets, non-grocers and small retailers/convenience all saw a slight decrease in their volume share (-0.6%, -0.7% and -0.3% respectively). Supermarkets continued to be the main channel used by Scottish households to purchase groceries into the home throughout 2020 (67.2%). Share of spend on take home food and drink increased for non-grocers (6.4%) and small retailers/convenience (4.7%) in 2020, compared to 2019.

There was a small drop in the volume of total food and drink purchased into the home on a price promotion, from 28.4% in 2019 to 27.3% in 2020. The majority of food and drink purchased on price promotion was done so through a temporary price reduction, which is in line with previous monitoring.[2]

1 The impact of COVID-19 on the out of home sector in Scotland | Food Standards Scotland
2 Monitoring retail purchase and price promotions in Scotland (2014 - 2018) | Food Standards Scotland

3.2 Purchase of calories and nutrients

Previous FSS monitoring data indicated little change in calories purchased into the home, per capita, per day between 2014-2018. However, an increase of 10.9% (241 kcal) was observed between 2019 and 2020. The greatest increase in calories purchased into the home was observed during the second quarter of the 2020, coinciding with the first national lockdown, when calories purchased per capita, per day, were 16.8% higher in 2020 compared to the same period in 2019.

As a proportion of total food and drink purchased during 2020, discretionary food and drink products were considerable contributors to the take home purchase of calories and nutrients, accounting for 22.7% of total calories, 36.4% of total sugar, and 22.8% of total fat. Alcoholic drinks purchased in 2020 contributed a further 4.4% to retail purchase of calories. This data shows little change from 2019.

3.3 Purchase of individual food and drink categories

The take home purchase of all individual food and drink categories increased during 2020, in comparison to 2019. Of the 17 categories included within this report, those with the greatest increase in volume purchased were savoury home cooking (21.4%), alcoholic drinks (19.3%), sweet home cooking (18.3%), ambient carbohydrates and snacks (14.6%) and crisps and savoury snacks (13.2%). A greater proportion of discretionary food and drink categories were purchased on price promotion (36.6%) than non-discretionary categories (24.7%). In 2020, crisps and savoury snacks had the highest level of purchase into the home on price promotion of all the categories included in this report (43.1%), with the lowest level observed within total bread (14.4%).

3.4 Purchase of individual food and drink categories, by social class

Discretionary categories represented a similar proportion of food and drink purchased into the home among social classes AB, C1, C2 and D, at around 24.9% to 25.5% of volume. However, this rose to 29.9% of volume within social class E. Fruit, vegetables and salads accounted for a greater proportion of total food and drink purchased in social classes AB (10.1%) and C1 (9.0%) compared to social classes D (8.3%) and E (8.4%). Milk, cheese, eggs and spread, total meat and fish, and starchy foods accounted for a similar proportion of total food and drink purchased across all social class groups. Alcoholic drinks represented the greatest proportion of total food and drink purchased in social class C1 (5.3%) and the least in social class E (3.9%).

3.5 Conclusion

This report highlights an overall increase in the volume of take home food and drink purchased from retail in Scotland in 2020, compared to 2019. This increase was accentuated in week 4 of March, ahead of the first national lockdown being announced, and also during week 4 of December, prior to restrictions on socialising being introduced over the festive period. Overall, an additional 241 kcal were purchased per capita, per day in 2020, compared to 2019.

Overall, the volume of total food and drink purchased into the home increased by 8.2% in 2020, compared to 2019. Discretionary and alcoholic drink categories accounted for a total of 22.7% and 4.4% of total calories purchased into the home, respectively. The food and drink categories which saw the greatest increases in purchase into the home were store cupboard items, which tend to have long shelf lives, or items which may have been associated with comfort, enjoyment or pastimes during uncertain times.

Purchase on price promotion continues to be skewed towards less healthy categories. The proportion of some discretionary foods purchased on price promotion increased in 2020, despite an overall reduction in total food and drink purchased on price promotion between 2019 and 2020.

The overall observed shifts in purchasing behaviours are varied, with minimal impact on types of retailers used, but lasting changes in the increased use of online shopping occasions and fewer visits to retail settings. COVID-19 infection rates resulted in regional lockdowns around Scotland at various time points in 2020, which also placed restrictions on the out of home food sector operating. These restrictions may have led to a subsequent increase in food and drink purchased into the home, as people spent more time at home. Therefore, it is important to note that the data presented within this report cannot be interpreted as an overall increase in total food and drink purchased, as it does not take into account any changes in food and drink purchased from the out of home environment (including takeaways). FSS analysis indicates a reduction of 36% in the market value of the out of home sector in 2020, compared to 2019.[1] Despite this, takeaways specifically grew by 31% between 2019 and 2020. Whilst information on overall calorie intakes during this time is not currently available, a study by the Institute of Fiscal Studies suggests that total calories purchased in 2020 from both retail and out of home was 10% more than in 2019.[3]

This data provides an important baseline to continue monitoring the impact of COVID-19 on our retail purchasing patterns in Scotland, to understand to what extent our behaviours return to pre-pandemic levels. This report also complements and adds to the existing evidence base, which informs discussions with government, industry and stakeholders to support the development of policy to help consumers make healthier purchases and ultimately lead to dietary improvements in Scotland.

3 The dietary impact of the COVID-19 pandemic | Institute for Fiscal Studies

4. Context: the COVID-19 pandemic

FSS has a dietary surveillance programme to monitor the dietary intakes of the Scottish population and progress towards the Scottish Dietary Goals (SDGs).[4] This monitoring shows little improvement in the Scottish diet since 2001, with the exception of reductions in Non-Milk Extrinsic Sugars (NMES)[5] and salt.[6] However, despite these reductions, average intakes of both NMES and salt remain too high and above the SDGs.

The surveillance programme also includes monitoring of retail food and drink purchase into the home in Scotland. FSS has previously published data on take home food and drink purchase in Scotland, with data up to July 2020.[7] This current report updates previous key findings with data up to the end of 2020, providing key insights into the retail purchasing behaviours of people in Scotland during the COVID-19 pandemic, compared to the same weeks in 2019.

Advice to stay home except for essential purposes, restrictions on socialising and the closure of schools and many workplaces is likely to have contributed to changes in retail purchasing patterns, with more people eating in the home compared to normal. stockpiling of food and drink was also widely reported in the media in the run up to the national lockdown in March 2020. However, insight from Kantar suggests that spend within the total food and drink market (both in home and out of home) experienced an overall decline in 2020.

This report does not include Out of Home (OOH) data. FSS recently published an overview of the OOH environment in 2020, including changes since 2019 and the impact of COVID-19 on this sector. The market value of the overall OOH sector in Scotland reduced by 36% in 2020; however, the takeaway sector grew by 31%, an increase of £253 million. Takeaways, including delivery, doubled over this time, equating to an additional 21 million occasions in 2020 compared to 2019.

Furthermore, the data does not include contextual information such as motivations for purchase. To complement this report, we have investigated how eating patterns and behaviours changed in 2020 compared to 2019. It was found that taste and functional needs were the top drivers of consumption in 2019 and 2020, while 'treating' emerged as more important over this time, superseding convenience.[8]

4 Revised Dietary Goals for Scotland | Scottish Government
5 Estimation of food and nutrient intakes from food purchase data in Scotland between 2001 and 2018 | Food Standards Scotland
6 National Diet and Nutrition Survey: Assessment of dietary sodium | Food Standards Scotland
7 Exploring the impact of COVID-19 on food and drink retail purchasing patterns in Scotland | Food Standards Scotland
8 Exploring the impact of COVID-19 on eating patterns and behaviours inside the home in Scotland | Food Standards Scotland

2020

Feb

11 Feb
World Health Organization (WHO) assign official name "COVID-19".

28 Feb
First British Death.

Mar

1 March
First case in Scotland. 1

11 March
WHO declares a pandemic, first case of community transmission in Scotland and first death in Scotland.

15-20 March
Mass gatherings of more than 500 people cancelled, schools and hospitality sectors closed.

24 March
NATIONAL LOCKDOWN BEGINS

May

1 May
Rules on going outdoors for exercise are relaxed.

6 May
National Records of Scotland first weekly reduction in deaths.

29 May
Move to Phase 1* with updated rules on physical distancing.

Jun

19 June
Move to Phase 2*, face coverings mandatory on public transport.

Jul

10-15 July
Move to Phase 3*, OOH sector allowed to reopen.

22 July
Permitted reopening of drive-in entertainment.

31 July
People in Scotland warned against traveling to areas of England.

Aug

1 Aug
Shielding no longer required.

3 Aug
UK Government's Eat Out to Help Out scheme launches.

5 Aug
Introduction of local restrictions in Aberdeen (restrictions on other areas in Scotland come into effect sporadically until 21 Sept).

11 Aug
Schools reopen full time.

14 Aug
Becomes mandatory for hospitality settings to collect the contact details of visitors to their premises in support of Test and Protect.

Sept

10 Sept
Launch of the Protect Scotland app. Publication of updated route map, limiting indoor and outdoor gatherings to six people from two households, as Scotland remains in Phase 3.

21 Sept
The UK Chief Medical Officers issue a joint statement recommending that the UK COVID-19 alert level moves from level 3 to level 4.

22 Sept
New restrictions on household visits and a national curfew for pubs, bars and restaurants.

Oct

16-19 Oct
Wearing of face coverings becomes mandatory in workplace canteens and communal workplace areas, such as corridors and social spaces.

Nov

2 Nov
Five-level Strategic Framework comes into effect, indicating different levels of protection needed in local authorities based on different levels of virus transmission.

17 Nov
Restrictions on travel outside local authority except for an essential purpose come into effect.

24 Nov
UK-wide "limited relaxation" of coronavirus restrictions over the Christmas period announced.

Dec

2 Dec
UK Government announces vaccine has been authorised by the medicines regulator for use in the UK.

8 Dec
First vaccination in Scotland administered.

19-20 Dec
Tightening of COVID-19 restrictions around the festive period announced. Travel between Scotland and the rest of UK not legal unless for specific exemptions.

26 Dec
Level 4 restrictions applied, including the closure of non-essential retail and hospitality.

COVID-19 Timeline

Source
Timeline of Coronavirus (COVID-19) in Scotland
SPICe Spotlight | Solas air SPICe (spice-spotlight.scot)

5. About the report

This report presents trends in retail purchase of food and drink purchased into the home in Scotland between the week ending 6 January 2019 and the week ending 27 December 2020. It follows on from an initial report published in early 2021 which presents trends in weekly purchasing patterns in Scotland between January 2019 and week ending 26 July 2020. Longer term trends in total purchase have been provided to give further context using previously published FSS data.[9] However, due to differences in methodology and category definitions between this report and previous FSS monitoring it was not possible to provide longer term trends in purchase for individual food and drink categories. Section 8 provides further detail on these differences in methodology.

The data presented within this report were provided by Kantar for FSS. Details of Kantar's data collection methodology are provided in Section 7. Analyses and reporting of data was carried out by FSS in collaboration with Kantar.

As described under Section 4, the data presented in this report relates to retail purchasing in Scotland, and refers to take home purchases only. It does not include food and drink purchased for consumption OOH or home delivered takeaway foods.

The data presented relates to purchase and does not necessarily equate to consumption, as factors such as waste and cooking losses are not accounted for.

The report presents 2019 and 2020 data on:

- Total volume and spend on retail food and drink purchase and the number of retail trips.
- Purchase of retail food and drink, split by retailer type.
- Purchase of retail food and drink on price promotion, split by promotion type.
- Purchase of retail food and drink online, split by price promotions and retailer type.
- Purchase of retail calories and nutrients per capita, per day (data from 2014 to 2020).
- Contribution of food and drink categories to retail purchase of calories and nutrients.
- Purchase of 17 individual food and drink categories, including by social class.

9 Monitoring retail purchase and price promotions in Scotland (2014 - 2018) | Food Standards Scotland

6. Data categorisation

6.1 Food and drink categories

Of the categories available for analysis, this report examined 17 food and drink categories deemed most relevant to public health such as fruit, vegetables and discretionary foods, in addition to categories of particular relevance to reported lockdown behaviours, including canned goods and other food cupboard products. The 17 individual food and drink categories analysed in this report represent 48.1% and 48.6% of the total volume of food and drink purchased into the home in 2020 and 2019, respectively.

Category	Definition
Fruit	All fresh, chilled, frozen and tinned fruit.
Vegetables	All fresh, chilled, frozen and tinned vegetables, including salad leaves.
Sweet biscuits	All sweet biscuits.
Confectionery	All ambient sugar and chocolate confectionery and chewing gum.
Crisps and savoury snacks	All crisps, savoury snacks and nuts.
Puddings and desserts	Ambient, chilled, canned, powdered and frozen desserts including jellies, sponge puddings, rice pudding, custard, mousses and cheesecakes.
Regular soft drinks	All ambient and chilled soft drinks with added sugar, including squash, fruit juice and all carbonated drinks. Excludes all still, carbonated and flavoured waters (excluding soda).
Cakes and pastries	All ambient cakes and pastries including pies, plans and tarts. All higher fat and/or sugar morning goods including tea cakes, croissants, scones, iced buns, waffles and other morning pastries.
Alcoholic drinks	All alcoholic drinks, including wine, spirits, beer and cider.
Canned goods	All ambient canned soup, beans, fish, meat, pasta products, fruit and vegetables.
Ambient carbohydrates and snacks	All rice (dry and pouches), noodles, dry pasta, pulses, packet soup, couscous, instant hot snacks.
Total bread	All plain and flavoured bread and rolls including pre-packed, part-baked and freshly baked.
Sweet home cooking	Includes sweet cake and baking mixes, long life desserts, syrup and treacle, table and quick set jellies, baking fruit, snacking fruit and nuts, evaporated and condensed milk and non-dairy cream, and sugar.
Savoury home cooking	Includes ambient cooking sauces, cooking oils, ethnic ingredients, flour, herbs, spices, meat extract, packet stuffing, suet, sweet and savoury mixes, vinegar and salt.
Total meat	All fresh and frozen meat and meat products, including beef, pork, lamb, poultry and game.
Total fish	All fresh and frozen fish, smoked fish, shell fish and prepared fish.
Frozen dairy desserts	Includes all frozen dairy desserts including cheesecake, yoghurt and mousse.

6.2 Retailers

Data on individual retailers has been grouped according to retailer type:

Supermarkets*	Discounters	Small retailers/ convenience stores	Non-grocers
Tesco, Asda, Sainsbury's, Morrisons, Marks & Spencer, Iceland, Waitrose, Other multiples	Aldi, Lidl, bargain stores	Co-op, other independents	Chemists and drugstores, 'other stores'

*Includes online shopping occasions from supermarkets

7. Kantar: data collection and methodology

Data used within this analysis was collected between week ending 6 January 2019 and the week ending 27 December 2020, from around 2,650 Scottish household panellists, each year. All food and drink products (around 100,000) purchased into the home were categorised into around 340 sub-categories.

Nutritional composition data from food labels is also collected and regularly updated by Kantar. This allows assessment of changes over time in the volume purchase and related nutritional composition of individual food and drink categories including those on price promotion, and assessment of the total purchase of calories, fats, sugar and salt into the home in Scotland.

Data on calories, protein, total carbohydrate, total sugar, total fat, saturated fat, dietary fibre and salt is collected from package labels and updated every four months. Data on content from the label (sourced from fieldwork, product samples, product packaging images and those copied across from different pack sizes) were available for 74% of products (85% of volume) with the remaining imputed from similar products. In some cases, for non-bar-coded products where package label data was not found (less than 1% of products), published values from generic data derived from national food composition tables was used. For some product categories, which tend to be sold loose (bread, rolls, morning goods, cakes and pastries), calorie and nutrient content values were provided per serving rather than per 100g due to the lack of information on the weight of the product. The strength of using the nutritional information from product packaging is that it is frequently updated by Kantar and is likely to reflect any recent changes in the household product mix and in the nutritional composition of the products. However this relies on the accuracy of nutritional labelling.

Data on volumes purchased (based on the consumer panel records) is combined with product nutritional information to estimate the calorie, total fat, saturated fat, total sugar and sodium contribution for all categories and in relation to total purchase. Annual purchase data for Scotland was also converted to daily per capita purchases, to help take account of changes in the size of the Scotland population and to provide information on trends in an easier to understand format. No weighting was done for changes to the profile of the population in terms of age and sex.

Price promotion data is also recorded by panellists. Types of price promotional data collected by Kantar include "temporary price reduction" (TPR), "Y for £X", "multi-buy", "price-marked packs" and "other promotion" (see Glossary for definitions). These data have been used to assess and monitor price promotion activity, particularly in relation to less healthy and discretionary categories.

Kantar track their data regularly against published retailer data to ensure the data is reflecting known trends and, because this data is sold to many manufacturers and retailers who provide ongoing feedback on the quality of the data, they are able to make adjustments and ensure they are providing the most accurate measure of the grocery market possible.

Rationale for not calculating confidence intervals and testing of statistical significance has been described in previous FSS publications. In summary, this is not conducted due to the non-random nature of the Kantar sample which means that traditional methods for carrying out such calculations are not appropriate.[10]

10 Monitoring retail purchase and price promotions in Scotland (2014 - 2018) | Food Standards Scotland

8. Comparability with previous FSS reports

FSS's initial report, *'Exploring the impact of COVID-19 on food and drink retail purchasing in Scotland'*,[11] published in February 2021, contained weekly data up to July 2020. Data within this earlier report was shared with FSS as part of an existing contract between Public Health England (PHE) and Kantar, during the early response to the COVID-19 pandemic. The definitions used to define volume within the PHE data set were not comparable with previous monitoring retail purchase reports published by FSS, which have a different standardised definition of volume.

Volume for most individual food and drink categories can be measured in units of kilograms or litres. However, for some categories (loose products such as cakes, pastries, morning goods and eggs) where pack weights are not available, volume is expressed as number of servings or packs. Our initial report[10] defines volume based on kg, litres and *packs*, whereas previous FSS monitoring of retail purchasing defines volume as kg, litres and *servings*. Neither approach is incorrect but delivers differing figures within some categories.

Therefore, data presented within this present report has been updated with FSS standardised definitions for the volume of food and drink (previously referred to as nutritional volume), for comparability with our previous monitoring reports.[12] During this process, FSS also aligned category definitions of discretionary foods with our previously published data. Although this has resulted in some minor differences in the definitions used compared to our previous report, the overall findings and trends are comparable.

11 Exploring the impact of COVID-19 on food and drink retail purchasing in Scotland | Food Standards Scotland

12 Monitoring retail purchase and price promotions in Scotland (2014 - 2018) | Food Standards Scotland

9. Results

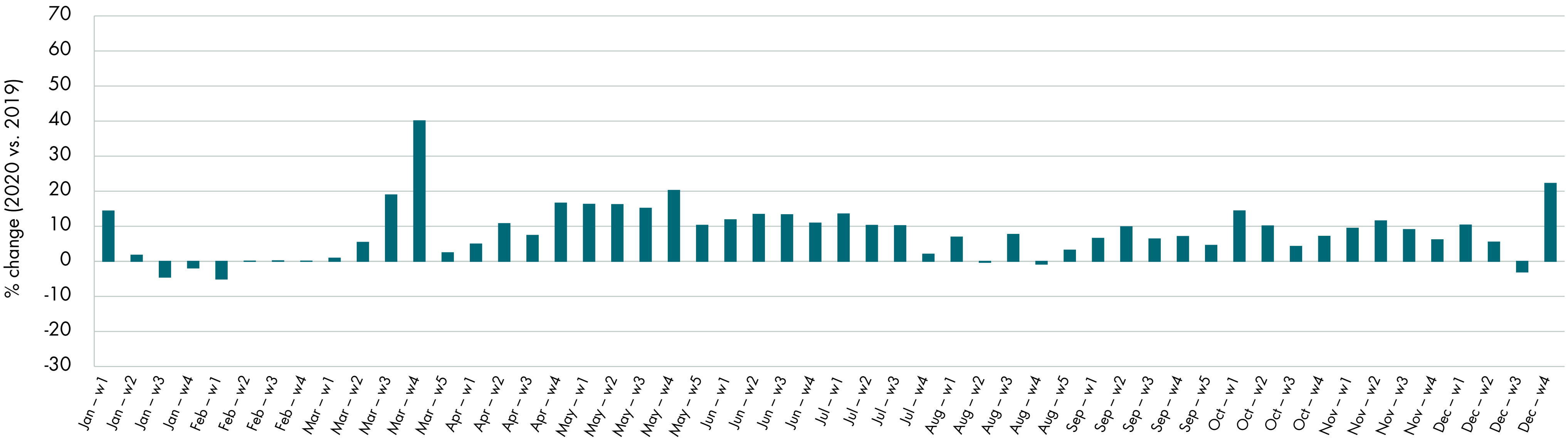
9.1 Overview of the retail food and drink landscape in Scotland

9.1.1 Total purchase of retail food and drink

Overall, there was an 8.2% increase in the total volume of food and drink purchased into the home in Scotland in 2020, compared with 2019. Figure 1. below presents the percentage change in weekly take home purchase of food and drink over this time. The data shows that the change in purchase varied by week. However, the largest percentage change was observed in Week 4 of March, the week prior to the national lockdown, when people were told to only leave their home for essential purposes including food shopping. Retail purchase during this week was 40.1% higher in 2020, compared to 2019. With the exception of a few weeks, the volume of total food and drink purchased generally remained higher from April to December 2020, compared with the same weeks in 2019, despite reports of some retailers limiting the purchase of certain products such as pasta and canned goods. Take home purchase of food and drink increased again during Week 4 in December, when tightening of restrictions and closure of non-essential retail and hospitality was announced.

Figure 1

Total purchase of retail food and drink (volume) in Scotland per week: 2020 vs. 2019



9.1.2 Total number of trips and household trips

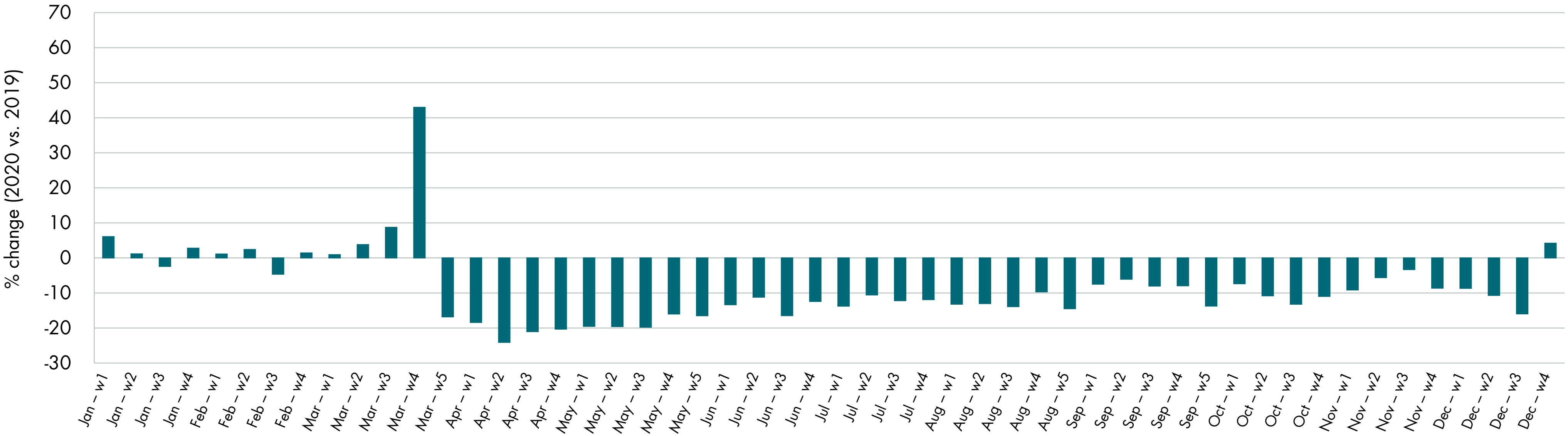
In 2020 a total of 660,220,834 trips were made to purchase food and drink from the retail environment in Scotland (including online shopping occasions). This represents an overall decrease of 8.6% compared to 2019, when the total number of trips was 721,975,904. However, the volume of food and drink purchased per retail trip increased by 19.3% over this time.

Figure 2 below presents the percentage change in the total number of trips to the retail environment on a weekly basis in Scotland, between 2019 and 2020. The data shows that trips were 43.0% higher in Week 4 of March 2020 compared to the same week in 2019, which may reflect additional shopping trips to stock up on food within the home before lockdown was announced, as people were advised to only leave home for essential purposes. For the remainder of 2020, retail trips remained lower with the exception of Week 4 of December when tightening of restrictions and closure of non-essential retail and hospitality had been announced.

At a household level, an average of five trips per week were made to purchase food and drink from the retail environment in 2020 compared to an average of six in 2019. In the week immediately preceding the national lockdown in 2020, the number of household trips rose to eight per week, which perhaps reflects public concern regarding food supply and more people being in the home to consume food throughout the day.

Figure 2

Number of retail food and drink trips in Scotland per week: 2020 vs. 2019



9.1.3 Total spend on food and drink

In 2020, spend on retail food and drink purchased into the home in Scotland was £10.4 billion, which was 12.6% (£1.1 billion) greater compared to 2019.

Figure 3 below shows that the largest percentage change in spend on total food and drink was during Week 4 of March, the week prior to the national lockdown. During this week, spend was 53.7% higher in 2020 compared to 2019. Although this dropped in subsequent weeks, it remained consistently higher throughout the rest of 2020, with the exception of Week 3 in December, when spend was 1.0% lower than in 2019. The change in spend subsequently increased again the following week after the announcement regarding tightening of restrictions and closure of non-essential retail and hospitality.

Figure 3

Total spend on retail food and drink in Scotland, weekly: 2020 vs. 2019

9.1.4 Total purchase on price promotion, by promotion type

Overall, there was a decrease in food and drink purchased on price promotion in 2020, compared with the previous year. As a proportion of total food and drink purchased into the home in Scotland, 27.3% was purchased on price promotion in 2020 compared to 28.4% in 2019.

Figure 4 illustrates the percentage change in the proportion of food and drink purchased on price promotion between 2019 and 2020, on a weekly basis. There was consistently less food and drink purchased on price promotion between Week 4 of March and Week 4 of August 2020, compared to the same weeks in 2019. During this time, some retailers limited sales of key food items, such as canned goods and pasta, to prevent stockpiling. Conversely, throughout the month of December 2020, the volume of total food and drink purchased on price promotion was consistently greater than the same weeks in 2019.

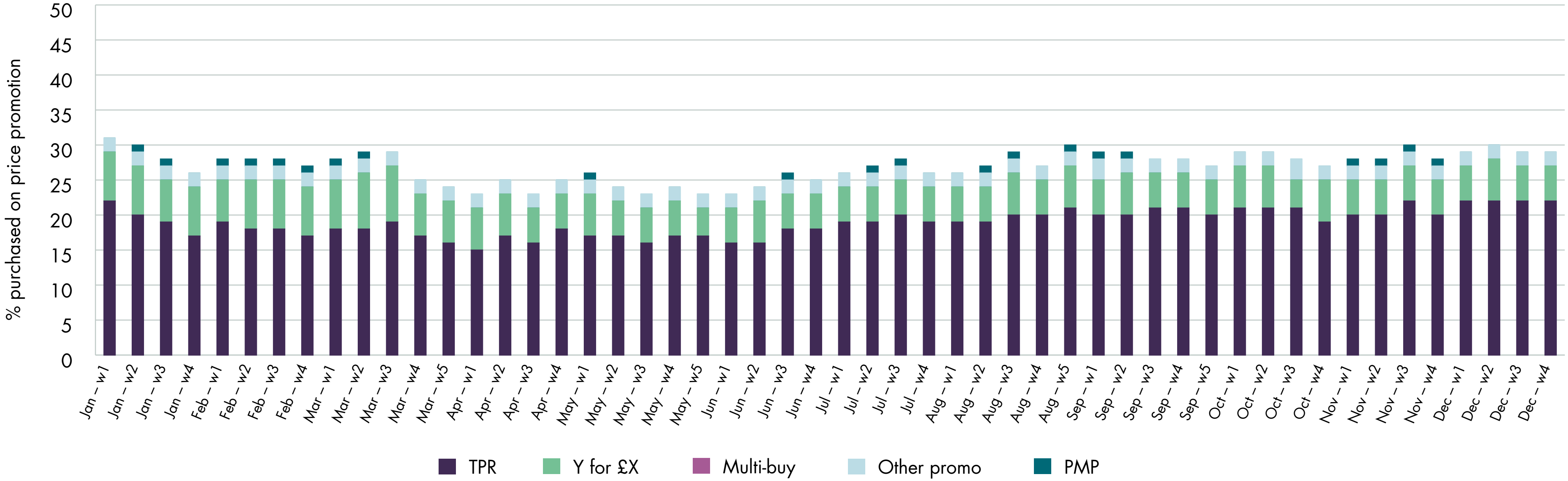
Figure 4

Volume purchased on price promotion, as a proportion of total food and drink, weekly: 2020 vs. 2019

Figure 5 below illustrates the weekly variation in the proportion of total food and drink purchased on price promotion throughout 2020, split by promotion type. Overall in 2020, 19.0% of food and drink was purchased on 'TPR', 5.6 % as part of a 'Y for £X' deal, 2.2% on 'other promotions' and 0.5% on 'PMP'. Compared to 2019, 'multi-buy' and 'Y for £X' price promotion types declined the most in 2020, while the proportion of food and drink purchased on 'other promo' increased, which includes extra free deals, meal deals, free gifts and samples.

Figure 5

Volume purchased on price promotion, as a proportion of total food and drink, weekly: 2020 vs. 2019



9.1.5 Total purchase by retailer type

People in Scotland also changed the way in which they shopped for groceries following the national lockdown and throughout the COVID-19 pandemic in 2020. Figure 6 below compares the percentage change in different types of retailers' volume share of food and drink purchased in 2020 compared to 2019.

From January to August, supermarkets accounted for a lower percentage share of volume in 2020 compared to 2019 whereas discounters grew their share of volume share over this time. In April 2020, there was a large increase (19.0%) in volume share of small retailers/convenience compared to 2019. However, this declined from August and by December 2020 where the volume share of small retailers/convenience was 14.94% lower than the same period in 2019. Similarly, the volume share of small retailers/convenience stores and discounters in 2020 was generally lower than 2019 towards the end of the year.

Figure 6

Total purchase of retail food and drink (% share of market) in Scotland, by retailer type, monthly: 2020 vs. 2019

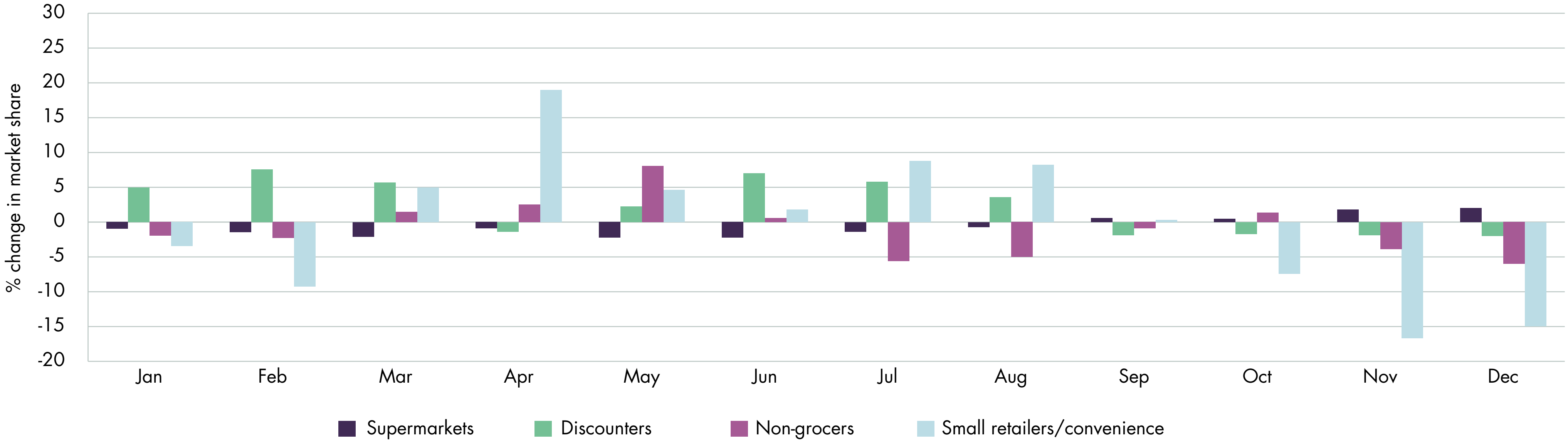


Figure 7 below presents the overall percentage share of volume by retailer type in 2020 and 2019. Despite the fluctuations observed on a monthly basis in Figure 6 above, supermarkets, non-grocers and small retailers/convenience saw only a minimal decrease in volume share in 2020 (-0.6%, -0.7% and -0.3% respectively). Discounters saw an increase in share in 2020 of 2.2%.

Figure 7

Total purchase of retail food and drink (% share of market) in Scotland, by retailer type, annually: 2020 vs 2019

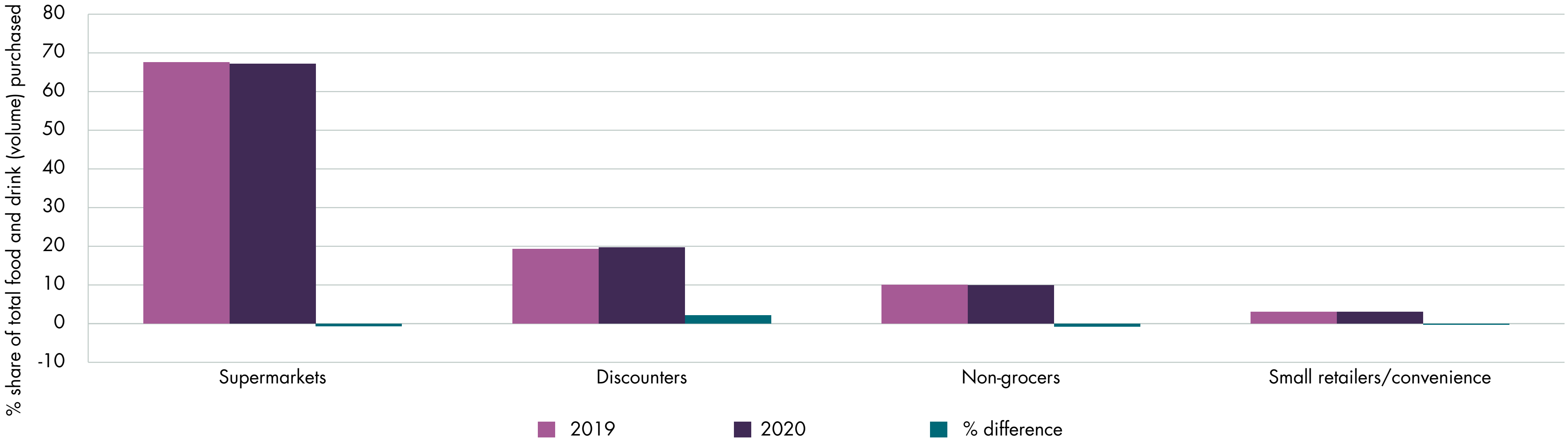


Figure 8 below compares the percentage change in the share of spend on food and drink by retailer type in 2020, compared to 2019. Throughout several months of 2020, non-grocers and small retailers/convenience saw considerable increases in their share of spend on food and drink compared to 2019. In contrast, the share of spend from supermarkets was predominantly lower in 2020, compared to 2019.

Figure 8

Total purchase of retail food and drink (% share of spend) in Scotland, by retailer type, monthly: 2020 vs. 2019

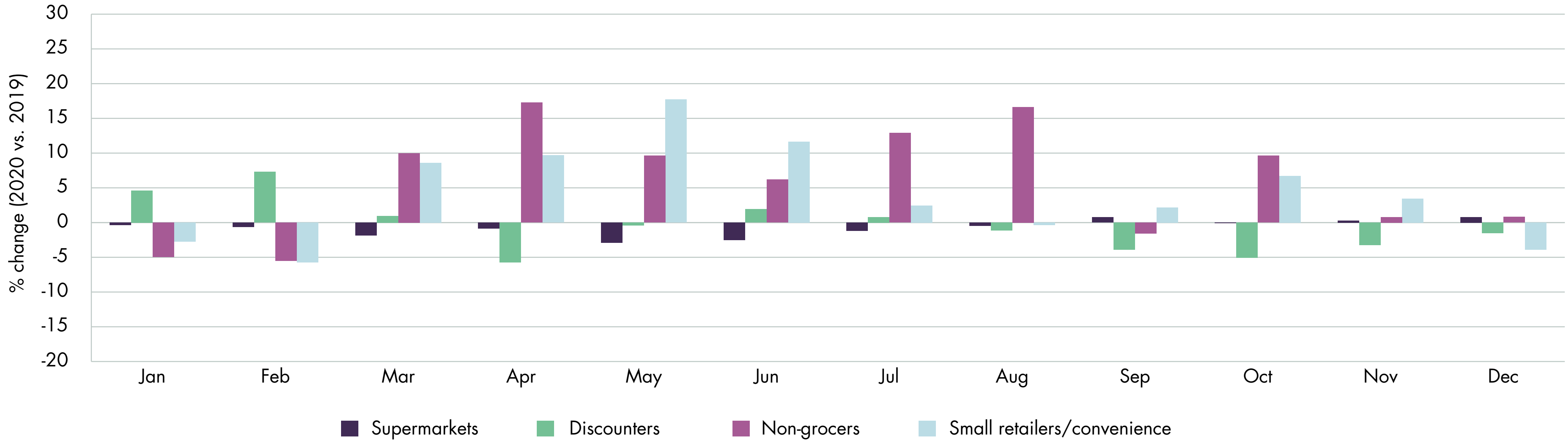
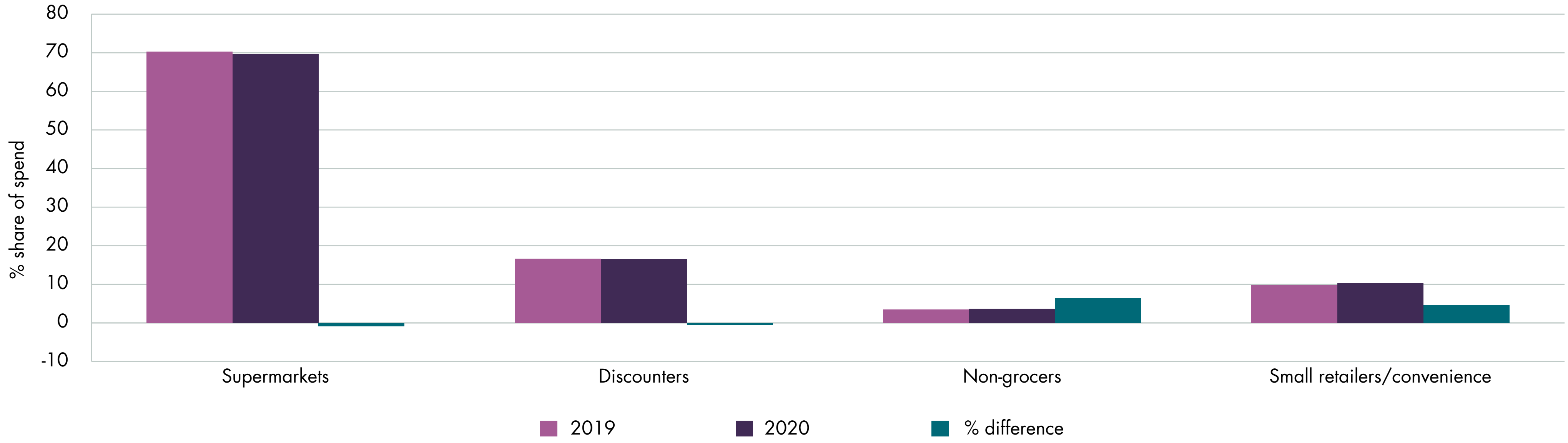


Figure 9, below presents the overall percentage share of spend on food and drink, by retailer type, in 2020 and 2019. Despite fluctuations observed on a monthly basis in Figure 8, non-grocers and small retailers/convenience saw increases an overall increase in their percentage share of spend in 2020 compared to 2019 (+6.4% and +4.7% respectively), whilst supermarkets and discounters saw a decline (-0.8% and -0.6% respectively).

Figure 9

Total purchase of retail food and drink (% share of spend) in Scotland by retailer type, annually: 2020 vs 2019



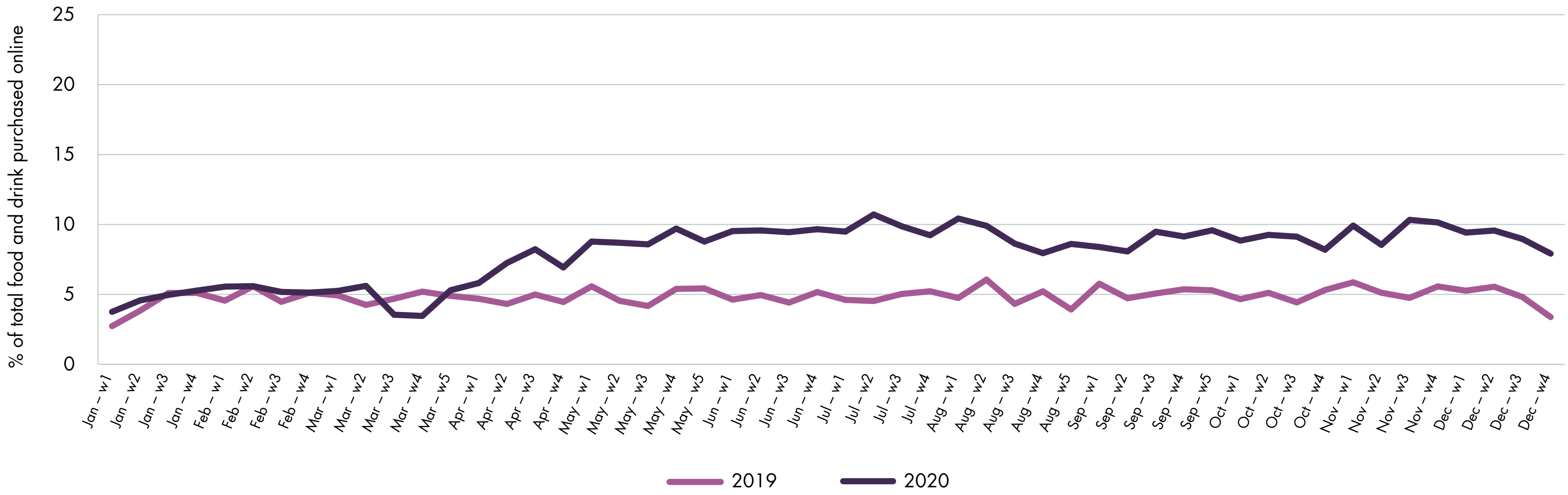
9.1.6 Total purchase online

In Scotland, the volume of total food and drink purchased online into the home increased from 4.9% in 2019, to 8.0% in 2020. This represents an overall increase of 63.9% since 2019.

Figure 10 below shows the weekly variation in the proportion of total food and drink that was purchased online in 2019 and 2020. Since the first week of April in 2020 (the second week into the first national lockdown) the proportion of food and drink purchased online remained consistently higher throughout the rest of the year, compared to the same weeks in 2019.

Figure 10

Total purchase of retail food and drink (volume) purchased online in Scotland, weekly: 2020 vs. 2019



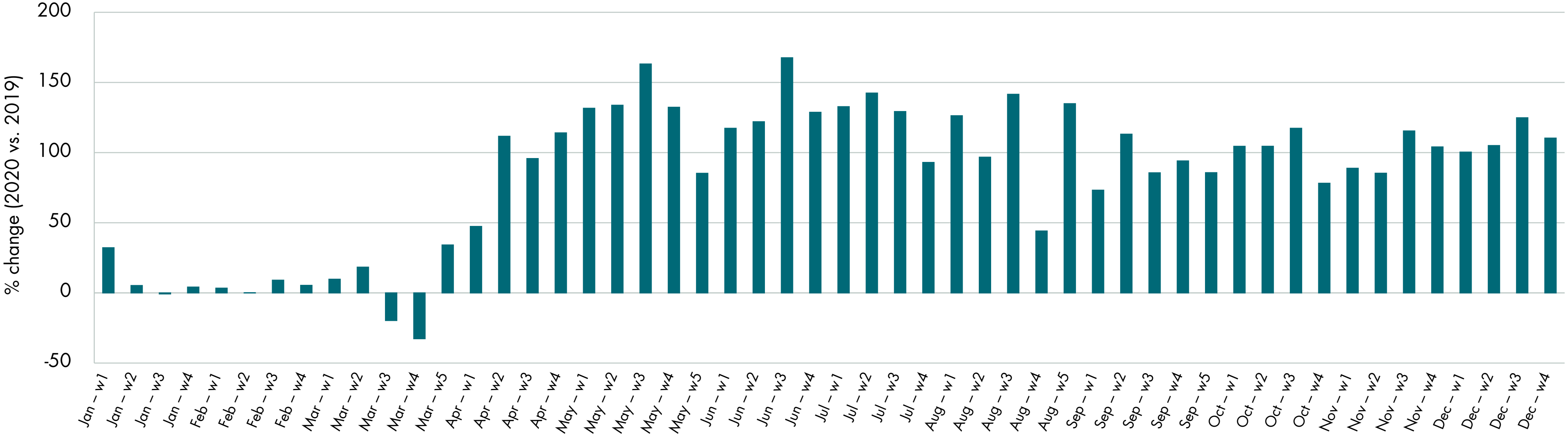
9.1.7 Total number of online shopping occasions

In Scotland there were a total of 13,653,277 retail food and drink online shopping occasions in 2020. This represents an overall increase of 78.8% compared to 2019, when the total number of online shopping occasions was 8,347,981.

Figure 11 below presents the percentage change in the total number of online shopping occasions on a weekly basis, in 2020 compared to 2019. The data shows that from Week 5 in March, the week of the first national lockdown, online shopping occasions were greater throughout the rest of 2020 compared to the same weeks in 2019, peaking at 167.6% in Week 3 of June 2020.

Figure 11

Number of retail food and drink online shopping occasions in Scotland, weekly: 2020 vs. 2019



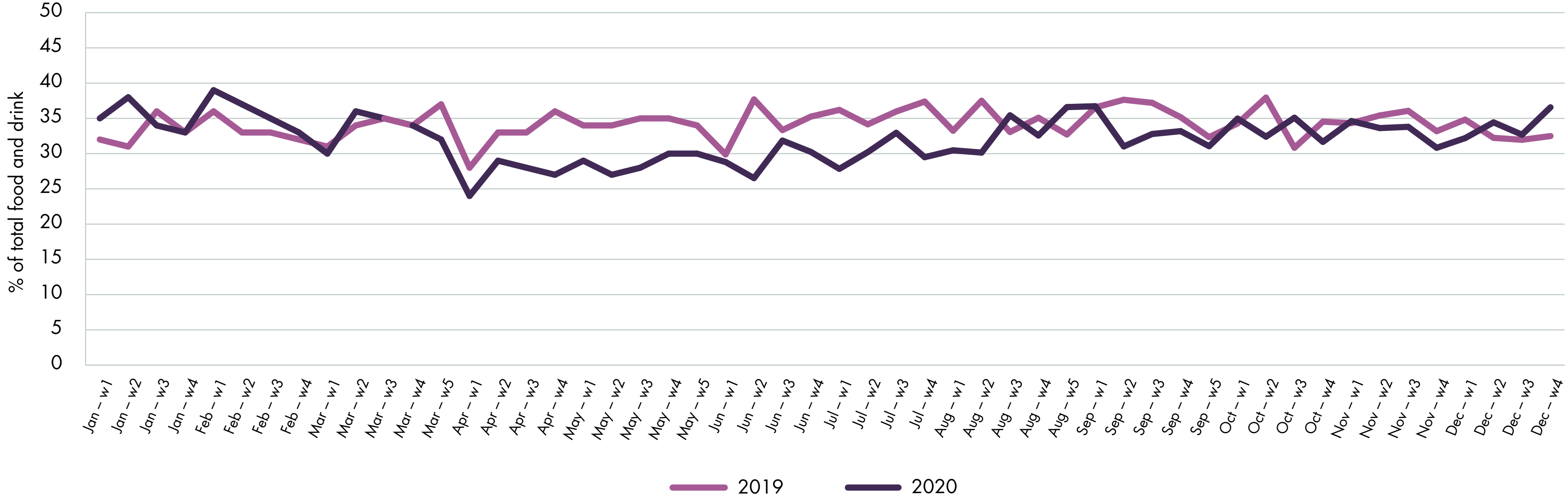
9.1.8 Total purchase online, on price promotion

In 2020, the volume of total food and drink purchased online and on price promotion was 31.9%. This was greater than the overall retail purchase of food and drink purchased on price promotion (27.3%), which accounts for food and drink purchased both in store and online.

Figure 12 shows the volume of food and drink purchased online on price promotion, on a weekly basis, in 2020 and 2019. The data highlights variation between weeks. However, purchase online on price promotion was generally lower in 2020 compared to 2019 after the first national lockdown had been announced in Week 4 of March. Overall, online purchase on price promotions declined by 6.9% in 2020, compared to 2019 (31.9% vs. 34.2%).

Figure 12

Online purchase of retail food and drink (volume) purchased on price promotion in Scotland, weekly: 2020 vs. 2019



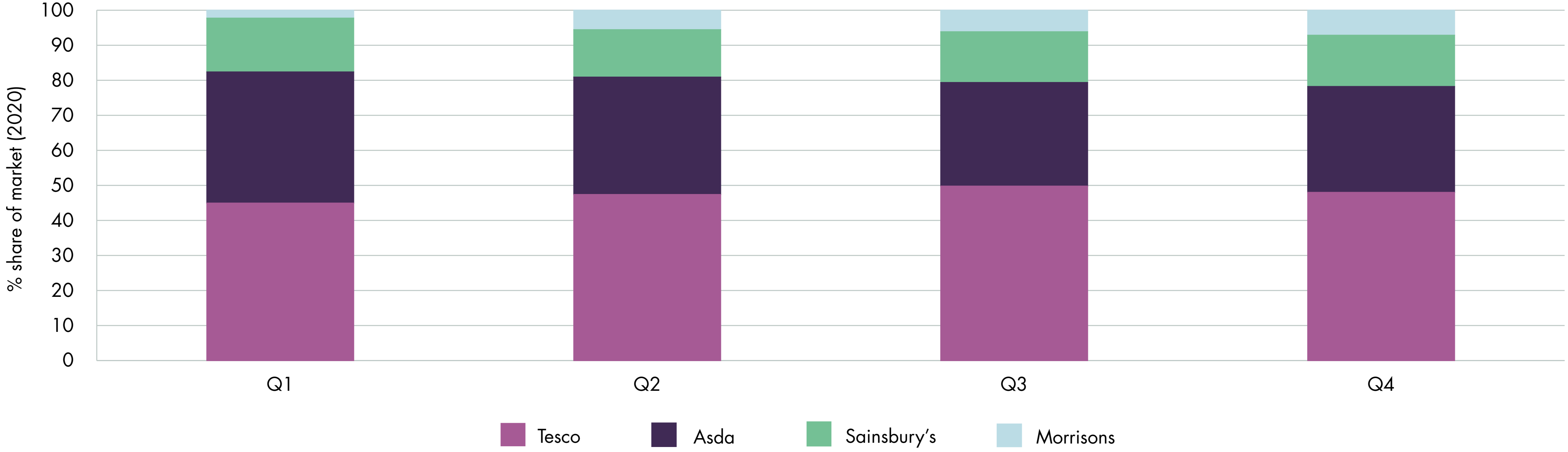
9.1.9 Total online purchase by retailer[13]

Overall in 2020, Tesco accounted for the highest percentage share of food and drink purchased online in terms of volume (47.9%), followed by Asda (40.0%). Morrisons had the lowest percentage share of food and drink purchased online at 5.7%, followed by Sainsbury's at 14.4%.

Figure 13 below shows the percentage share of online food and drink purchased in 2020 on a quarterly (13 weekly) basis, by supermarket retailer. The data shows that Tesco and Asda retained the highest percentage share food and drink volume purchased online throughout all quarters of the year. However, Morrisons share of online volume purchased increased from 2.3% in Quarter 1 of 2020 to 7.1% in Quarter 4. There was little change in the market share Sainsbury's across the four quarters of 2020.

Figure 13

Online purchase of retail food and drink (volume) in Scotland, by supermarket retailer, quarterly: 2020

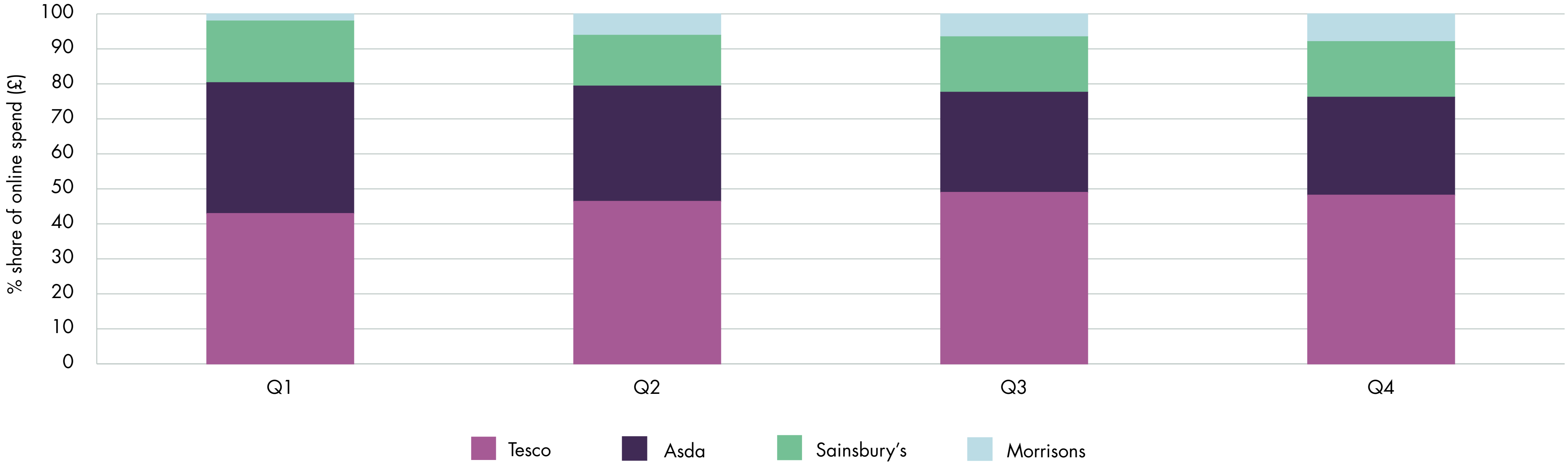


13 Purchase online for individual retailers has been reported for Tesco, Sainsbury's, Asda and Morrisons only. It was not possible to report online purchase from other retailers such as Waitrose, Marks and Spencer and Iceland, due to insufficient sample size in Scotland.

Figure 14 below shows the percentage share of spend on food and drink online for each supermarket retailer, on a quarterly basis, in 2020. As with volume (Figure 13), Tesco accounted for the greatest share of spend throughout 2020. Asda accounted for the next highest share of retail food and drink spend, followed by Sainsbury's and Morrisons.

Figure 14

Online purchase of retail food and drink (volume) in Scotland, by supermarket retailer, quarterly: 2020



9.2 Take home purchase of calories and nutrients

9.2.1 Take home purchase of calories per capita, per day in Scotland (2014-2020)

Table 1 below presents calories and nutrients purchased into the home from retail per capita, per day, in Scotland between 2014-2020. As described within Sections 5 and 8, longer term trends of take home purchase have been provided using previously published FSS data to provide further context. Percentage change has been calculated for a variety of timescales to demonstrate progress before the COVID-19 pandemic (2014 – 2019), short-term impacts of the pandemic so far (2019 – 2020) and overall change, including the impact of the pandemic (2014 – 2020).

A key driving factor of any changes in take home purchase of nutrients observed in 2020 compared to previous years may be due to food and drink occasions moving into the home, as a result of COVID-19 restrictions. This data does not take into account any changes observed due to losses from the out of home sector. In addition, there is no available data at the time of writing this report on nutrient intakes during the COVID-19 pandemic. Therefore, reported changes in take home purchase of individual nutrients and calories per capita, per day, between 2019 and 2020, would not necessarily equate to a net increase/ decrease in purchase overall. As such, findings should be used with care, as any changes in take home purchase of food and drink during 2020 may be explained, partly or mostly, by displacement of purchasing behaviours.

The data shows little change in calories purchased into the home per capita, per day, between 2014 and 2019. However, an increase of 10.9% (241 kcal) was observed between 2019 and 2020, resulting in an overall increase of 11.0% since 2014. The take home purchase of total sugar declined by 5.4% between 2014 and 2019. Conversely there was an 8.7% increase between 2019 and 2020, which resulted in an overall increase of 2.8% between 2014 and 2020. Purchase of total fat and saturated fat increased between 2014 and 2020, with an overall increase in purchase of total and saturated fat of 13.0% and 13.5%, respectively. Similarly, the increase in per capita, per day purchase of salt (excluding table salt) between 2019 and 2020 almost entirely cancelled out previous reduction since 2014.

Table 1

Take home purchase of energy, total sugar, fat, saturated fat and salt per capita, per day in Scotland (2014 – 2020)[14]

Per capita, per day	2014	2015	2016	2017	2018	2019	2020	% change (2014 – 2019)	% change (2019 – 2020)	% change (2014 – 2020)
Energy (kcal)	2208	2178	2203	2234	2237	2211	2452	0.1	10.9	11.0
Total sugar (g)	125	123	123	124	120	118	129	-5.4	8.7	2.8
Fat (g)	88	87	88	89	90	90	99	1.8	11.0	13.0
Saturated fat (g)	34	34	34	35	35	35	39	2.4	10.9	13.5
Salt (g) (excluding table salt)	6.3	6.3	6.2	6.5	6.6	5.6	6.2	-11.1	10.7	-1.6

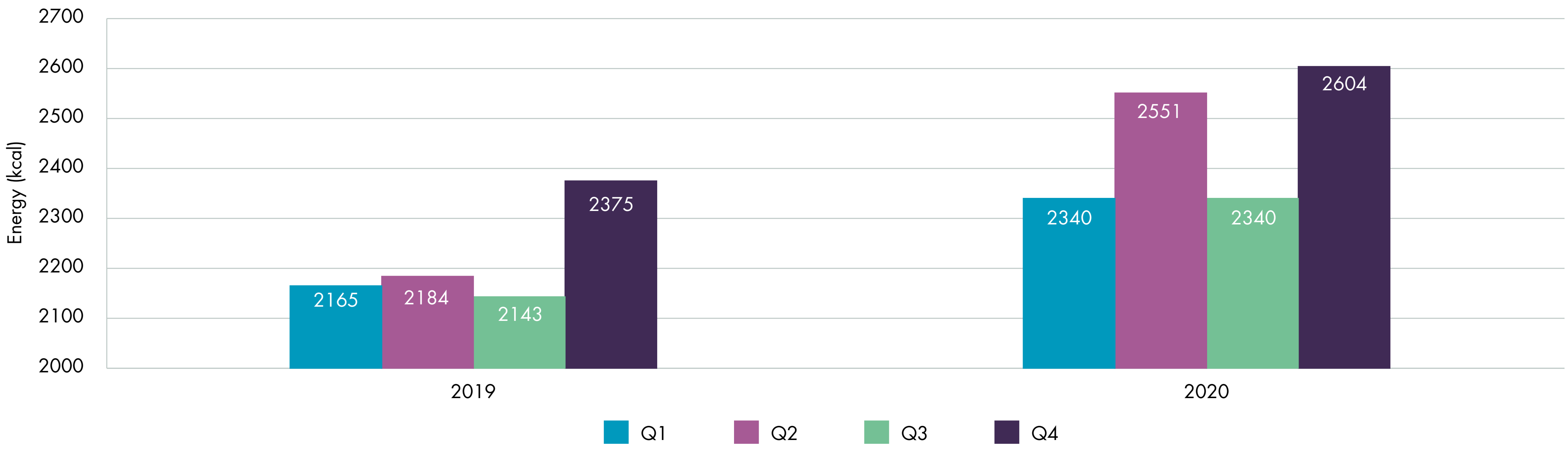
14 This data includes what is purchased for household consumption and takes into account the increasing population, but does not include any population weighting, for example, by age group and gender.

Figure 15 below presents take home purchase of calories per capita, per day in Scotland throughout each quarter of 2019 and 2020. In 2019, take home purchase of calories per capita ranged from 2,143 kcal per day in Quarter 3 to 2,375 kcal per day in Quarter 4. In comparison, daily purchase of calories per capita was higher across all quarters in 2020, ranging from 2,340 kcal per day in Quarters 1 and 2 to 2,604 kcal per day in Quarter 4.

The take home purchase of calories per capita, per day remained relatively stable between Quarter 1 – Quarter 3 in 2019. However, it was more variable across the same time period in 2020, increasing from 2,340 kcal per day prior to COVID-19 restrictions in Quarter 1 to 2,551 kcal per day in Quarter 2, before decreasing again to 2,340 kcal per day in Quarter 3.

Figure 15

Take home purchase of energy (kcal) per capita, per day in Scotland, quarterly: 2020 vs. 2019

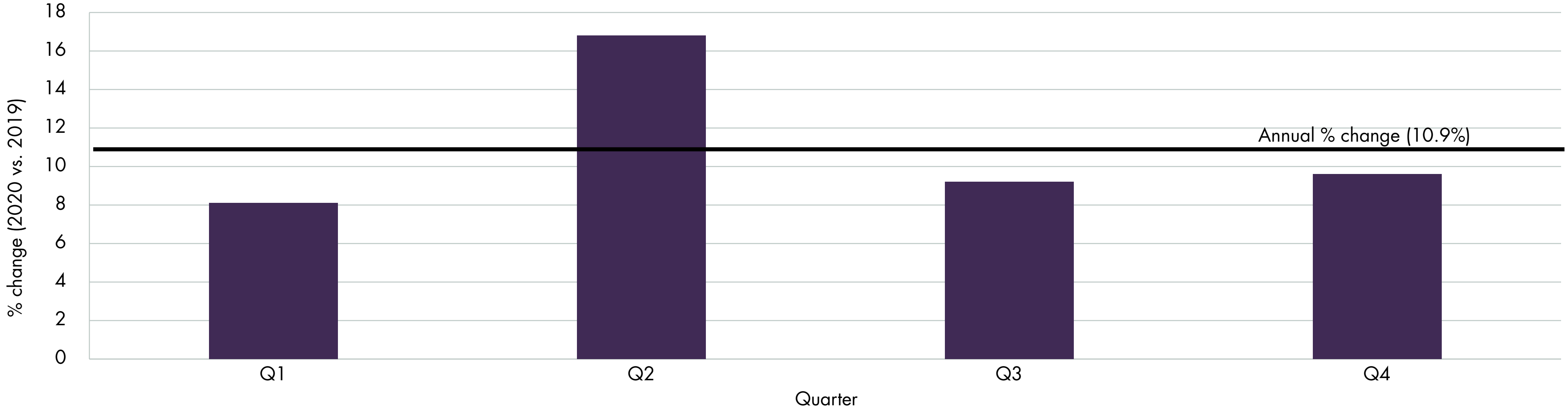


9.2.2 Percentage change in take home purchase of calories per capita, per day in Scotland, for 2020 compared to 2019

Figure 16 below presents the percentage change in take home purchase of calories in 2020 compared to 2019, on a quarterly basis. The data shows that the greatest change occurred in the second quarter, after COVID-19 restrictions were introduced, with an increase 16.8% in the calories purchase per capita in 2020 compared to 2019. This period of increased energy purchased into the home during the first national lockdown may have been as a result of more people eating at home due to closure of education, work and socialisation settings, such as the OOH sector. However, there were also media reports of stockpiling of food products during this period. Although this dropped to 9.2% and 9.6% in Quarters 3 and 4 respectively, the overall percentage change in per capita, per day purchase of calories was 10.9% in 2020 compared to 2019.

Figure 16

Retail purchase of energy (kcal) per capita in Scotland, quarterly: 2020 vs. 2019



9.2.3 Food and drink categories contributing to take home purchase of calories, total fat, saturated fat, total sugars and sodium in Scotland

Table 2 below outlines the percentage contribution of various food and drink categories[15] towards the take home purchase of calories, total fat, saturated fat, total sugar, sodium and fibre from retail in 2020. This data does not take into account the decline in purchase from the out of home sector throughout much of 2020.

The percentage change in the contribution of food and drink categories in 2020, compared to 2019 is provided in full in Annexe 4, and shows little change. Meanwhile, the contribution of alcoholic drinks and cupboard and cooking ingredients to the take home purchase of calories increased by 9.6% and 5.8%, respectively, in 2020 compared to 2019.

Discretionary food and drink products, such as confectionery, crisps and savoury snacks and regular soft drinks, contributed considerably to the purchase of calories (22.7%), total sugar (36.4%) and total fat (22.8%) into the home, in 2020.

Milk, cheese, eggs and spread contributed 27.8% to take home purchase of total fat and 35.3% to saturated fat, while cupboard and cooking ingredients contributed 35.2% to purchase of sodium.

Starchy foods and fruit, vegetables and salads were substantial contributors to retail purchase of fibre in 2020, accounting for 23.8% and 23.2% respectively.

Table 2

Annual percentage contribution of food and drink categories to take home purchase of nutrients in Scotland (2020)

Category	Calories	Total fat	Saturated fat	Total sugar	Sodium	Fibre
Alcoholic drinks	4.4%	0.0%	0.0%	1.7%	0.3%	0.0%
Fruit, vegetables and salads	6.7%	2.3%	1.2%	14.5%	0.8%	23.2%
Starchy foods	13.0%	4.7%	2.9%	7.3%	9.6%	23.8%
Cupboard and cooking ingredients	14.1%	18.9%	8.2%	19.6%	35.2%	12.4%
Total meat and fish	6.9%	9.5%	8.6%	0.4%	10.9%	1.8%
Milk, cheese, eggs and spread	15.1%	27.8%	35.3%	10.1%	12.8%	0.9%
Chilled and frozen convenience	10.8%	12.4%	10.8%	3.4%	13.6%	13.9%
Discretionary food and drink	22.7%	22.8%	24.5%	36.4%	9.9%	15.8%
Other categories	6.3%	1.6%	8.5%	6.6%	6.9%	8.2%

15 Definitions of categories are provided in section 6.1.

Overall, discretionary food and drink products contributed almost a quarter of all calories purchased into the home. Table 3 below presents the contributions of individual discretionary food and drink categories towards the take home purchase of calories, total fat, saturated fat, total sugar, sodium and fibre in 2020. Within the discretionary food categories, confectionery was the greatest contributor to calories (5.8%), saturated fat (8.9%) and total sugar (13.5%). Sweet biscuits were the second greatest contributor to purchase of calories (5.6%) and saturated fat (7.8%), whilst regular soft drinks were the second greatest contributor to total sugar (7.5%). Analysis of monthly data showed no substantial change throughout 2020.

The percentage change in the contribution of individual discretionary food and drink categories in 2020 compared to 2019 is provided in Annexe 5, and shows some small changes in the contribution of these categories to purchase of calories and nutrients. For example, the contribution of cakes and pastries declined for calories (-9.8%), total fat (-11.1%), saturated fat (-11.1%), total sugar (-10.7%), sodium (-8.3%) and sodium (-7.5%) in 2020, compared to 2019.

Table 3
Annual contribution of discretionary food and drink categories to take home purchase of nutrients in Scotland (2020)

	Discretionary food categories percentage contribution in 2020 to:					
Category	**Calories**	**Total fat**	**Saturated fat**	**Total sugar**	**Sodium**	**Fibre**
Crisps and savoury snacks	4.1%	5.8%	1.7%	0.6%	3.6%	4.0%
Confectionery	5.8%	5.9%	8.9%	13.5%	1.0%	2.6%
Total puddings and desserts	1.1%	1.0%	1.6%	2.0%	0.4%	0.6%
Cakes and pastries	4.2%	4.0%	4.3%	5.6%	2.2%	3.5%
Sweet biscuits	5.6%	6.0%	7.8%	7.2%	2.3%	4.4%
Regular soft drinks	1.9%	0.1%	0.2%	7.5%	0.5%	0.7%
Total	22.7%	22.8%	24.5%	36.4%	9.9%	15.8%

9.3 Purchase of food and drink categories by social class

Figure 17 below presents the breakdown of total food and drink purchased into the home, by broad food category and split by social class in 2020. The data shows that discretionary food and drink categories represented a similar proportion of food and drink purchased in social classes AB, C1, C2 and D, ranging between 24.9% - 25.5% of volume. However, this rose to 29.9% of volume within social class E.

Fruit vegetables and salads represented a greater proportion of total food and drink purchased in social classes AB (10.1%) and C1 (9.0%) compared to social classes D (8.3%) and E (8.4%). Milk, cheese, eggs and spread, total meat and fish, and starchy foods accounted for a similar proportion of total food and drink purchased across all social class groups. Alcoholic drinks represented the greatest proportion of total food and drink purchased in social class C1 (5.3%) and the least in social class E (3.9%).

Figure 18 below presents similar data for the year 2019. The data shows that discretionary food and drink categories represent between 24.9% - 25.5% of total food and drink purchased for social classes AB, C1 and C2. However, this increased to 25.5% and 29.9% in social classes D and E respectively. Fruit, vegetables and salads represented a greater proportion of total food and drink purchased in social classes AB (10.2%) and C1 (9.1%) compared to social classes D (8.1%) and E (7.8%). Milk, cheese, eggs and spread, total meat and fish, and starchy foods accounted for a similar proportion of total food and drink purchased across all social class groups. Alcoholic drinks represented the greatest proportion of total food and drink purchased in social class C1 (5.0%) and the least in social class E (3.8%).

Figure 17

Retail purchase of food and drink categories (volume) in Scotland, by social class: 2020

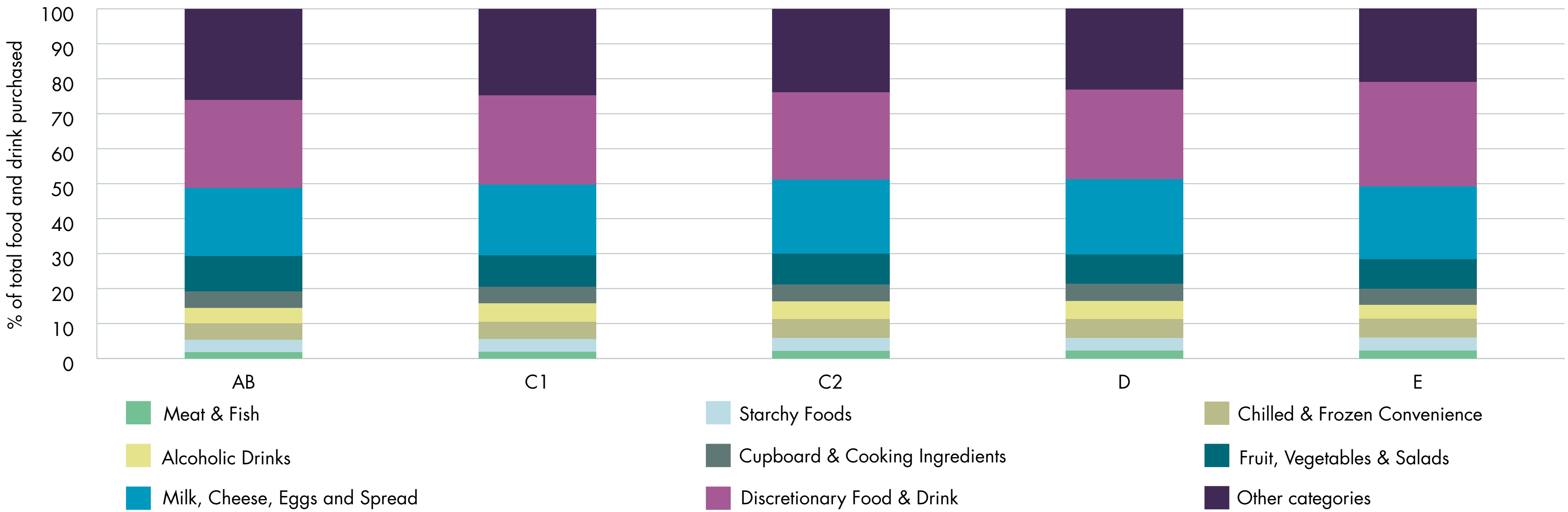


Figure 18
Retail purchase of food and drink categories (volume) in Scotland, by social class: 2019

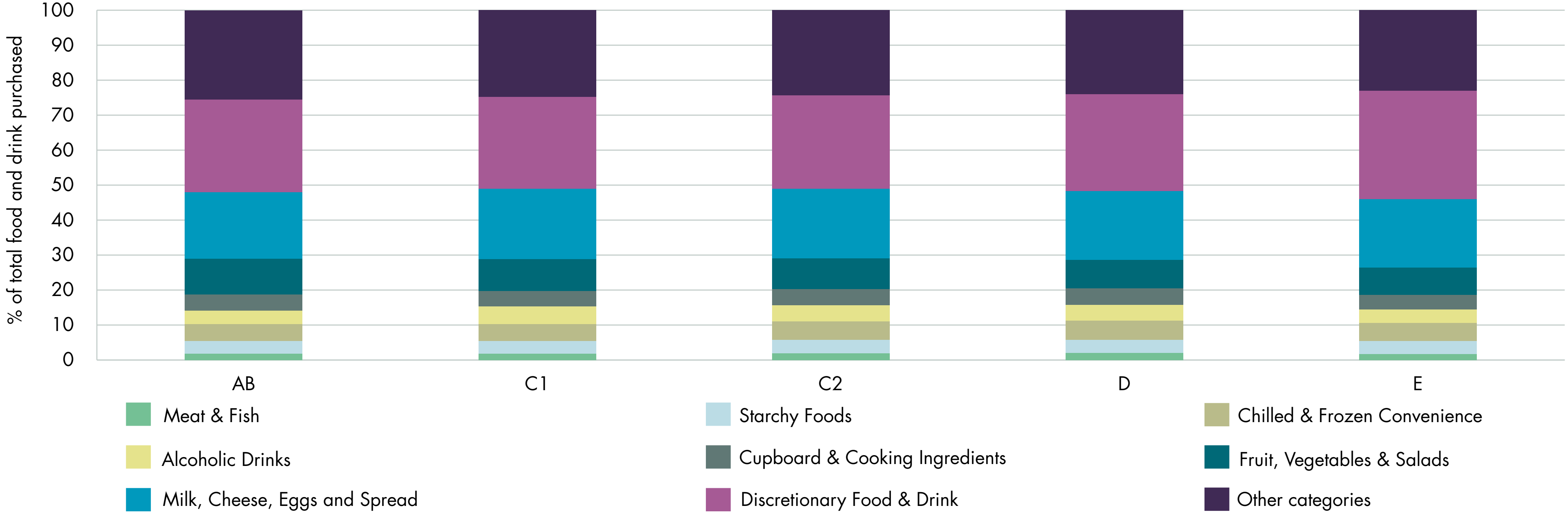


Table 4 below shows the percentage change in the volume of retail food and drink categories purchased across different social classes in 2020, compared with 2019. The largest increases were seen in the chilled and frozen convenience category across all social class groups with the exception of social class E. This was mirrored within alcoholic drinks.

Table 4

Category (volume)	Social Class: percentage change (2020 vs. 2019)				
	AB	C1	C2	D	E
Total food & drink	8.8	9.5	12.5	3.9	3.1
Discretionary food & drink	-4.7	-3.1	-7.1	-8.3	-3.3
Milk, cheese, eggs and spread	2.0	0.7	6.4	9.4	6.4
Fruit, vegetables & salads	-1.6	-1.4	0.3	1.5	7.7
Cupboard & cooking ingredients	4.7	7.8	5.5	5.0	12.7
Alcoholic drinks	15.6	5.6	12.5	14.7	1.3
Chilled & frozen convenience	-3.9	1.4	-1.3	-4.8	2.8
Starchy foods	0.0	2.6	-0.2	0.3	2.6
Meat & fish	-0.5	1.5	9.6	11.2	26.5
Other categories	8.6	8.0	8.2	7.9	-9.5

9.4 Take home purchase of individual food and drink categories in Scotland, including on price promotion

9.4.1 Overview

Table 5 below presents the percentage change in the volume of individual food and drink categories purchased into the home between 2019 and 2020. The data shows that the purchase of several individual categories purchased increased in 2020 at a level beyond the increase in overall total food and drink purchase (8.2%). This included savoury home cooking (21.4%), alcoholic drinks (19.3%), sweet home cooking (18.3%), ambient carbohydrates and snacks (14.6%), crisps and savoury snacks (13.2%), canned goods (12.8%), total fish (12.7%), vegetables (11.6%), confectionery (9.7%), total meat (9.5%) and sweet biscuits (8.6%). A number of other categories also increased over this time, but to a lesser extent than the overall 8.2% increase in total food and drink, including regular soft drinks (7.2%), bread (6.8%), fruit (5.9%) and puddings and desserts (4.1%).

The greatest volume increases in take home purchase of most categories was during Week 4 of March 2020, the week before the first national lockdown was announced, and the end of December, when tightening restrictions over the festive period was a concern. Around this time, advice was to only leave home for essential purposes, which included shopping for food. With more household members in the home and public concern about food supplies during these times in 2020, consumers appear to have purchased greater volumes of food and drink into the home in comparison to 2019. In addition, where increases were observed, these tended to be store cupboard items which tend to have long shelf lives, such as savoury home cooking, canned goods and ambient carbohydrates and snacks, or items which are associated with enjoyment or pastimes, such as sweet home cooking and alcohol.

This data is presented in more detail in a supplementary report: **Weekly purchasing patterns of a selection of individual food and drink categories**.

Table 5
Percentage change in volume of food and drink categories purchased into the home in Scotland (2020 vs. 2019)

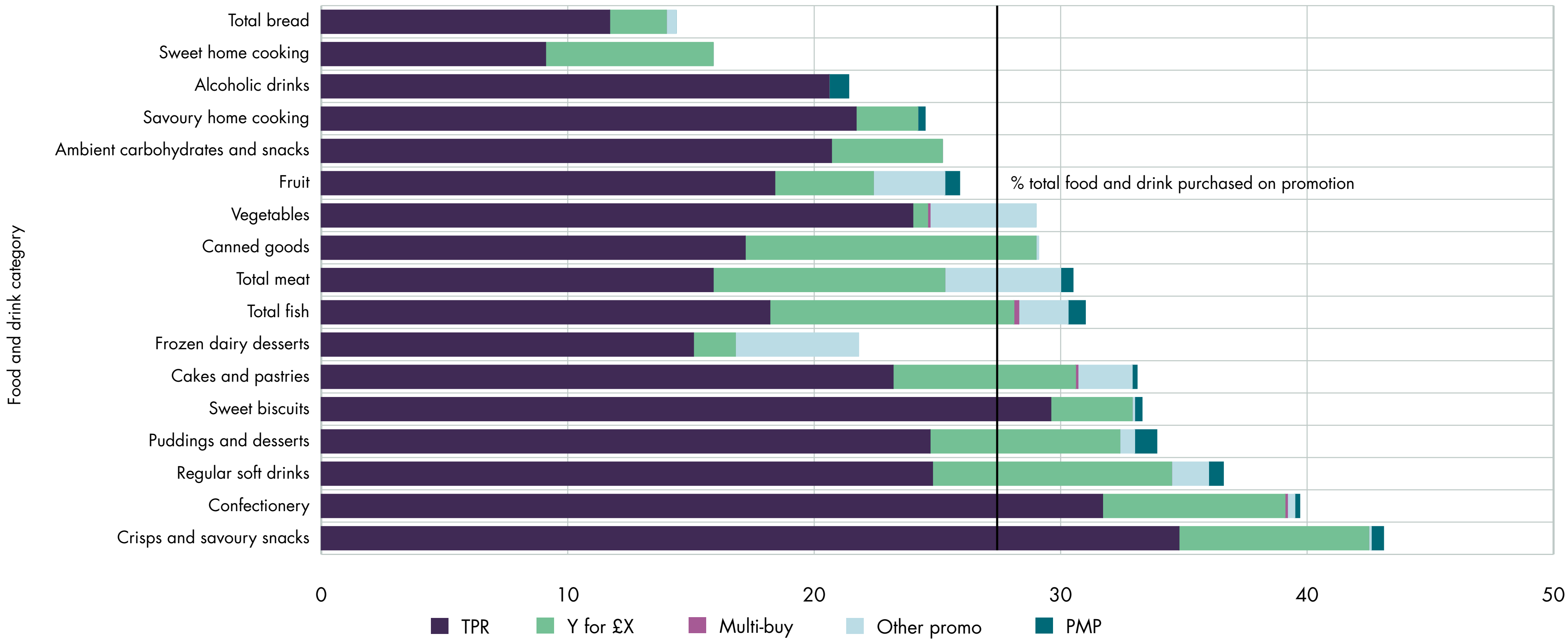
Category	Volume: % change (2020 vs. 2019)
Total food & drink	**8.2**
Savoury home cooking	21.4
Alcoholic drinks	19.3
Sweet home cooking	18.3
Ambient carbohydrates and snacks	14.6
Crisps and savoury snacks	13.2
Canned goods	12.8
Total fish	12.7
Vegetables	11.6
Confectionery	9.7
Total meat	9.5
Sweet biscuits	8.6
Regular soft drinks	7.2
Total bread	6.8
Fruit	5.9
Puddings and desserts	4.1
Cakes and pastries	1.0
Frozen dairy desserts	-6.5%

Figure 19 below illustrates the volume of individual food and drink categories purchased on price promotion, by price promotion type, in 2020. Of these categories, crisps and savoury snacks were purchased most on price promotion (43.1%) and total bread was least (14.4%).

The data shows that on average in 2020, more discretionary food and drink categories were purchased on price promotion (36.6%) than nondiscretionary foods (24.7%). The data also shows that TPR accounted for the majority of the food and drink categories that were purchased into the home, on a price promotion, in 2020, which aligns with previous FSS monitoring of purchase on price promotions.[16]

Figure 19

Retail purchase of food and drink categories (volume) purchased on price promotion, by promotion type, in Scotland, annually (2020)



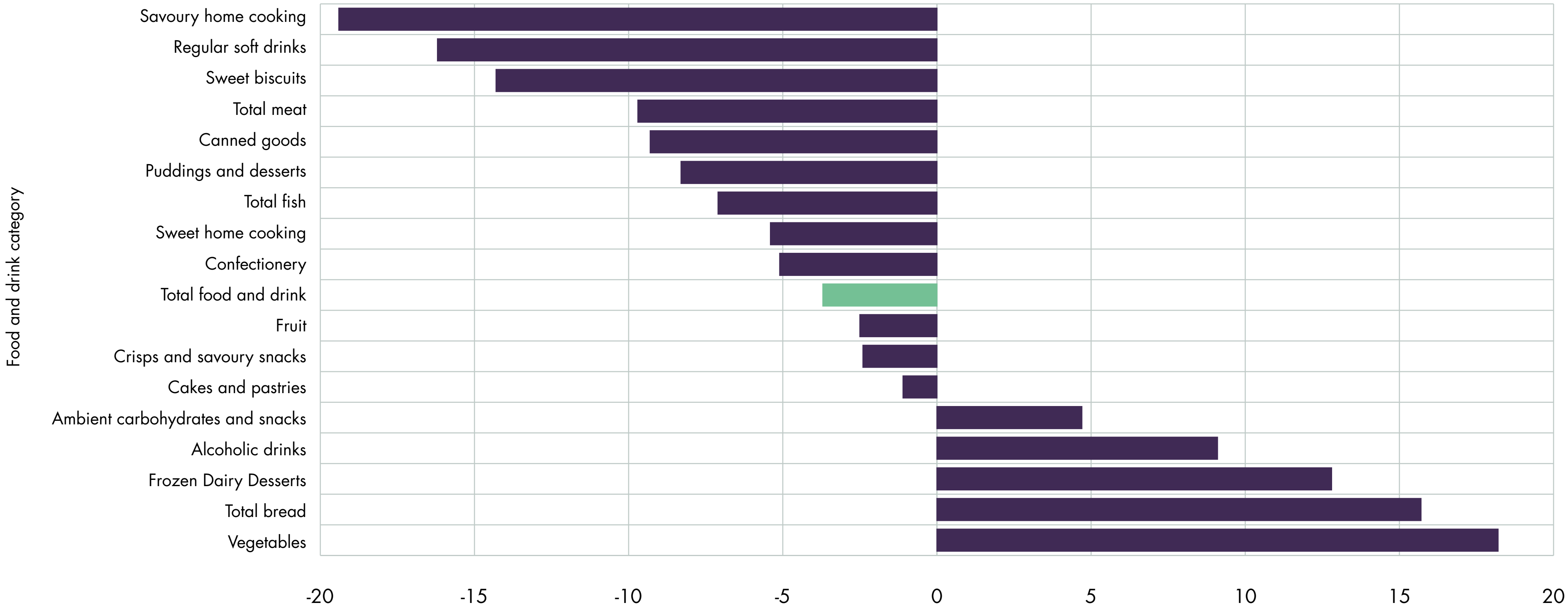
16 Monitoring retail purchase and price promotions in Scotland (2014-2018)

Despite a decline (-3.7%) in total food and drink purchased into the home on price promotion in 2020, compared to 2019, the purchase of a number of individual categories on price promotion increased over this time as, demonstrated in Figure 20.

The data shows that the take home purchase of vegetables (18.2%) total bread (15.7%), alcoholic drinks (9.1%) and ambient carbohydrates and snacks (4.7%) on price promotion increased in 2020 compared with 2019. The volume of a number of other categories purchased on price promotion declined, with several showing a greater level of decline than overall total food and drink. This includes savoury home cooking (19.4%) regular soft drinks (16.2%), sweet biscuits (14.3%), sweet home cooking (5.4%), puddings and desserts (8.3%), canned goods (9.3%), and total meat (9.7%).

Figure 20

Retail purchase of total food and drink (volume) purchased on promotion in Scotland: % change, annually, 2020 vs. 2019



10. Summary of key findings

- The volume of total food and drink purchased into the home from retail increased by 8.2% in 2020, compared to 2019, with the biggest peak of 40.1% seen in the week before the first national lockdown, Week 4 of March 2020. The overall volume of total food and drink purchased generally remained elevated from April to December when compared with 2019.
- Take home purchase of calories per capita, per day from the retail environment in Scotland increased by 10.9% in 2020. This equated to an additional 241 kcal purchased per capita, per day.
- Increases were also observed for total sugar (8.7%), total fat (11%), saturated fat (10.9%) and salt (excluding table salt) (10.7%). However, these increases cannot simply be attributed to overall dietary increases as this data does not take account contribution of calories and nutrients from other sources, such as out of home and takeaways, which were impacted to differing degrees as a result of COVID-19 restrictions through 2020.
- Discretionary food and drink categories contributed almost a quarter of all calories purchased into the home. Within this category, confectionery was the greatest contributor to calories (5.8%), saturated fat (8.9%) and total sugar (13.5%). Sweet biscuits were the second greatest contributor to purchase of calories (5.6%) and saturated fat (7.8%).
- The purchase of discretionary categories and alcoholic drinks combined accounted for 27.1% of total retail calories purchased.
- Despite a surge in trips (including online shopping occasions) to retail in the week before the first national lockdown, the total number of trips to retail decreased by 8.6% in 2020, compared to 2019. This equates to an average of five trips per week, per household in 2020, compared to six in 2019.
- The volume of total food and drink purchased online into the home increased by 63.9% during this time. Online shopping occasions also increased by 78.8% in 2020, compared to 2019.
- Spend on total food and drink purchased into the home from retail in 2020 was 12.6% (£1.1 billion) greater than in 2019.
- The take home purchase of most individual food and drink categories increased in 2020 in comparison to 2019, predominantly for store cupboard products with long shelf lives such as savoury home cooking (21.4%) and alcoholic drinks (19.3%).
- As a proportion of total food and drink purchased into the home, 27.3% was purchased on price promotion in 2020 compared to 28.4% in 2019. TPR remained the most predominant type of price promotion for take home food and drink purchases during this time period.
- During 2020, a greater proportion of discretionary food and drink categories were purchased on price promotion (36.6%) than non-discretionary categories (24.7%).

- In 2020, supermarkets continued to be the main channel used by Scottish households to purchase groceries into the home throughout 2020. Discounter and non-grocer retailers gained an increase in their share of volume by 2.2% and 2.3% respectively, whilst supermarkets and small retailers/ convenience saw a decrease in their volume share by -0.8% and -0.7% respectively.
- Discretionary food and drink products represented between 24.9% and 25.5% of total food and drink purchased into the home among social classes AB, C1, C2 and D. However this rose to 29.9% of volume within social class E. Alcoholic drinks represented the greatest proportion of total food and drink purchased in social class C1 (5.3%) and the least in social class E (3.9%). Meanwhile, fruit, vegetables and salads accounted for a greater proportion of total food and drink purchased in social classes AB (10.1%%) and C1 (9.0%) compared to social classes D (8.3%) and E (8.4%).

11. Conclusion

This report highlights an increase in the overall volume of total food and drink purchased into the home from retail in Scotland during 2020, compared to 2019. The greatest increase was observed during Week 4 of March prior to the first national lockdown, and then again during Week 4 of December as restrictions on socialising over the festive period were introduced.

The way in which food and drink was purchased also changed in 2020, with a surge in trips to retail during the week prior to the first national lockdown. Trips to retail subsequently declined and remained lower than 2019 levels throughout the rest of 2020, with the exception of Week 4 of December when tightening of restrictions and closure of non-essential retail and hospitality was announced. This data suggests that as public concern regarding the COVID-19 pandemic intensified from the end of March, and again in December 2020, our grocery shopping habits shifted. During this time, advice was to only leave home for essential purposes, which included shopping for food. With more household members staying at home coupled with some public concern about food supplies during these times in 2020, consumers appear to have purchased greater volumes of food and drink into the home in comparison to 2019. The lasting effect of the observed shifts in shopping behaviours are varied, with minimal impact on types of retailers used, but sustained increases in use of online grocery shopping and reducing number of visits to retail settings.

The volume of many individual food and drink categories purchased into the home during 2020 increased at a level beyond the increase in total food and drink purchase (8.2%). The food and drink categories in which the greatest increases in purchase were observed were predominantly store cupboard items, which tend to have long shelf lives, or items which are associated with enjoyment or pastimes such as baking ingredients, alcoholic drinks, sweet home cooking, crisps and savoury snacks, canned goods, vegetables, and confectionery.

There was also an overall decline in the purchase of food and drink on price promotion in 2020, compared to 2019. Despite this decline, purchase on price promotion continues to be skewed towards less healthy categories, with discretionary food and drink purchased on price promotion at greater levels than non-discretionary foods. The data also shows that TPR accounted for the majority of the food and drink categories that were purchased into the home on a price promotion, in 2020, which is in line with previous monitoring.

It is important to note that the trends presented in this report does not necessarily mean more food and drink has been purchased overall. The data within this report does not take into account any declines observed in food and drink purchased from the Out of Home environment as a result of COVID-19 restrictions on this sector throughout 2020. As a result of these restrictions, more people spent more time eating and drinking within the home, compared to previous years when eating out was more frequent. FSS data indicates a reduction of 36% in the market value of the out of home sector in 2020, compared to 2019. However, as a proportion of the Out of Home sector, takeaways specifically grew by 31% between 2019 and 2020. In addition, analysis conducted by the Institute of Fiscal Studies suggests that total calories purchased in 2020 from both retail and out of home was 10% more than in 2019.[17]

17 The dietary impact of the COVID-19 pandemic | Institute for Fiscal Studies

A report published Public Health England (since replaced by the Office for Health Improvement and Disparities) in November 2020, also analysed the impact of the COVID-19 pandemic on grocery shopping behaviours across Great Britain, up to June 2020.[18] Public Heath England reported a 43.6% increase in the volume of food and drink purchased into the home during the week prior to the first national lockdown, compared with the same week in 2019. This is similar to data presented for Scotland within this report that found a 40.1% increase in the volume of food and drink purchased into the home during the same week in 2020. Both reports also found that the volume of food and drink purchased into the home fell in subsequent weeks, but remained higher than the equivalent time periods in 2019. Similarities can also be identified in the individual food and drink categories which increased during this time, as well as an increase in online shopping trips.

Another report published by the Institute for Fiscal Studies which used the same data set up to 9 August 2020, reported that during the first month of lockdown, the share of grocery spending online was 20% higher than for the same period in 2019.[19] By the beginning of August, the increase compared with 2019 reached nearly 70%. This is comparable with the findings within this report, which found that online 'trips' to retail increased by 78.8% in 2020, compared to 2019.

The data presented within this report provide an overview of the impact that the COVID-19 pandemic has had on retail purchasing patterns in Scotland, during 2020. This report complements and adds to the evidence base which supports action to limit the availability, advertising and promotion of high-fat/salt/sugar products. It also provides an important baseline to continue monitoring the impact of COVID-19 on our retail purchasing patterns in Scotland. We will continue to monitor food and drink retail purchases, assess the extent to which our retail purchases return to pre-pandemic levels.

18 Impact of COVID-19 pandemic on grocery shopping behaviours - Public Health England

19 Grocery prices and promotions during the COVID-19 pandemic - Institute for Fiscal Studies - IFS

12. Annexe

12.1 Annexe 1 – Categorisation of weekly data

Month	Week Number	2019	2020	Month	Week Number	2019	2020
January	1	w/e 06/01/19	w/e 15/01/20	July	1	w/e 07/07/19	w/e 05/07/20
	2	w/e 13/01/19	w/e 12/01/20		2	w/e 14/07/19	w/e 12/07/20
	3	w/e 20/01/19	w/e 19/01/20		3	w/e 21/07/19	w/e 19/07/20
	4	w/e 27/01/19	w/e 26/01/20		4	w/e 28/07/19	w/e 26/07/20
February	1	w/e 03/02/19	w/e 02/02/20	August	1	w/e 04/08/19	w/e 02/08/20
	2	w/e 10/02/19	w/e 09/02/20		2	w/e 11/08/19	w/e 09/08/20
	3	w/e 17/02/19	w/e 16/02/20		3	w/e 18/08/19	w/e 16/08/20
	4	w/e 24/02/19	w/e 23/02/20		4	w/e 25/08/19	w/e 23/08/20
March	1	w/e 03/03/19	w/e 01/03/20		5	w/e 01/09/19	w/e 30/08/20
	2	w/e 10/03/19	w/e 08/03/20	September	1	w/e 08/09/19	w/e 06/09/20
	3	w/e 17/03/19	w/e 15/03/20		2	w/e 15/09/19	w/e 13/09/20
	4	w/e 24/03/19	w/e 22/03/20		3	w/e 22/09/19	w/e 20/09/20
	5	w/e 31/03/19	w/e 29/03/20		4	w/e 29/09/19	w/e 27/09/20
April	1	w/e 07/04/19	w/e 05/04/20	October	1	w/e 06/10/19	w/e 04/10/20
	2	w/e 14/04/19	w/e 12/04/20		2	w/e 13/10/19	w/e 11/10/20
	3	w/e 21/04/19	w/e 19/04/20		3	w/e 20/10/19	w/e 18/10/20
	4	w/e 28/04/19	w/e 26/04/20		4	w/e 27/10/19	w/e 25/10/20
May	1	w/e 05/05/19	w/e 03/05/20	November	1	w/e 03/11/19	w/e 01/11/20
	2	w/e 12/05/19	w/e 10/05/20		2	w/e 10/11/19	w/e 08/11/20
	3	w/e 19/05/19	w/e 17/05/20		3	w/e 17/11/19	w/e 15/11/20
	4	w/e 26/05/19	w/e 24/05/20		4	w/e 24/11/19	w/e 22/11/20
	5	w/e 02/05/19	w/e 31/05/20		5	w/e 01/12/19	w/e 29/11/20
June	1	w/e 09/06/19	w/e 07/06/20	December	1	w/e 08/12/19	w/e 06/12/20
	2	w/e 16/06/19	w/e 14/06/20		2	w/e 15/12/19	w/e 13/12/20
	3	w/e 23/06/19	w/e 21/06/20		3	w/e 22/12/19	w/e 20/12/20
	4	w/e 30/06/19	w/e 28/06/20		4	w/e 29/12/19	w/e 27/12/20

12.2 Annexe 2 – Categorisation of quarterly data

Quarter	2019	2020	Quarter	2019	2020
1 (January – March)	w/e 06/01/19	w/e 05/01/20	3 (July – September)	w/e 07/07/19	w/e 05/07/20
	w/e 13/01/19	w/e 12/01/20		w/e 14/07/19	w/e 12/07/20
	w/e 20/01/19	w/e 19/01/20		w/e 21/07/19	w/e 19/07/20
	w/e 27/01/19	w/e 26/01/20		w/e 28/07/19	w/e 26/07/20
	w/e 03/02/19	w/e 02/02/20		w/e 04/08/19	w/e 02/08/20
	w/e 10/02/19	w/e 09/02/20		w/e 11/08/19	w/e 09/08/20
	w/e 17/02/19	w/e 16/02/20		w/e 18/08/19	w/e 16/08/20
	w/e 24/02/19	w/e 23/02/20		w/e 25/08/19	w/e 23/08/20
	w/e 03/03/19	w/e 01/03/20		w/e 01/09/19	w/e 30/08/20
	w/e 10/03/19	w/e 08/03/20		w/e 08/09/19	w/e 06/09/20
	w/e 17/03/19	w/e 15/03/20		w/e 15/09/19	w/e 13/09/20
	w/e 24/03/19	w/e 22/03/20		w/e 22/09/19	w/e 20/09/20
	w/e 31/03/19	w/e 29/03/20		w/e 29/09/19	w/e 27/09/20
2 (April – June)	w/e 07/04/19	w/e 05/04/20	4 (October – December)	w/e 06/10/19	w/e 04/10/20
	w/e 14/04/19	w/e 12/04/20		w/e 13/10/19	w/e 11/10/20
	w/e 21/04/19	w/e 19/04/20		w/e 20/10/19	w/e 18/10/20
	w/e 28/04/19	w/e 26/04/20		w/e 27/10/19	w/e 25/10/20
	w/e 05/05/19	w/e 03/05/20		w/e 03/11/19	w/e 01/11/20
	w/e 12/05/19	w/e 10/05/20		w/e 10/11/19	w/e 08/11/20
	w/e 19/05/19	w/e 17/05/20		w/e 17/11/19	w/e 15/11/20
	w/e 26/05/19	w/e 24/05/20		w/e 24/11/19	w/e 22/11/20
	w/e 02/05/19	w/e 31/05/20		w/e 01/12/19	w/e 29/11/20
	w/e 09/06/19	w/e 07/06/20		w/e 08/12/19	w/e 06/12/20
	w/e 16/06/19	w/e 14/06/20		w/e 15/12/19	w/e 13/12/20
	w/e 23/06/19	w/e 21/06/20		w/e 22/12/19	w/e 20/12/20
	w/e 30/06/19	w/e 28/06/20		w/e 29/12/19	w/e 27/12/20

12.3 Annexe 3 – Food and drink categories included contributors to purchase of energy, fats, sugars and sodium in Scotland

Category	Kantar definition
Alcoholic drinks	All alcoholic drinks, including wine, spirits, beer and cider.
Fruit, vegetables and salads	All fresh, chilled, frozen and tinned and pre-prepared, fruit, salad leaves and vegetables including canned beans and herbs but excluding potatoes and sweet potatoes.
Starchy foods	Total bread (all plain and flavoured bread and rolls including pre-packed, part baked and freshly baked). Packet breakfast. Savoury carbohydrates and snacks (all rice (dry and pouches), noodles, dry pasta, pulses, packet soup, couscous, instant hot snacks).
Cupboard and cooking ingredients	Canned goods (all ambient canned soup, beans, fish, meat, pasta products, fruit and vegetables). Hot beverages. Savoury home cooking (includes ambient cooking sauces, cooking oils, ethnic ingredients, flour, herbs, spices, meat extract, packet stuffing, suet, sweet and savoury mixes, vinegar and salt). Cooking oils. Sweet home cooking (includes sweet cake and baking mixes, long life desserts, syrup and treacle, table and quick set jellies, baking fruit, snacking fruit and nuts, evaporated and condensed milk and non-dairy cream, and sugar). Pickle, table sauce and condiments.
Total meat and fish	Fresh and frozen fish (all fresh and frozen fish, smoked fish, shell fish and prepared fish). Fresh and frozen meat (all fresh and frozen meat and meat products, including beef, pork, lamb, poultry and game).
Milk, cheese, eggs and spread	Eggs. Total cheese. Total milk. Butter and margarine.
Chilled and frozen convenience	Chilled convenience. Frozen prepared foods.
Discretionary food and drink	Take home savouries. Ambient TH confectionery. Total puddings & desserts. Cakes and pastries, and higher fat/sugar morning goods. Sweet biscuits (all sweet biscuits). Regular soft drinks (ambient & chilled) excl water.

12.4 Annexe 4 – Food and drink categories contributing to take home purchase of nutrients in Scotland: 2019 vs. 2020

	Food and drink categories contributing to take home purchase of calories in Scotland		
Category	% of total calorie purchase 2019	% of total calorie purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	4.0	4.4	9.6
Fruit, vegetables and salads	6.8	6.7	-0.5
Starchy foods	13.1	13.0	-0.6
Cupboard and cooking ingredients	13.4	14.1	5.8
Total meat and fish	6.9	6.9	-0.2
Milk, cheese, eggs and spread	14.9	15.1	1.4
Chilled and frozen convenience	11.2	10.8	-4.2
Discretionary food and drink	23.5	22.7	-3.4
Other categories	6.3	6.3	0.0

	Food and drink categories contributing to take home purchase of total sugar in Scotland		
Category	% of total sugar purchase 2019	% of total sugar purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	1.6	1.7	6.2
Fruit, vegetables and salads	15.0	14.5	-3.3
Starchy foods	7.2	7.3	1.4
Cupboard and cooking ingredients	18.3	19.6	7.1
Total meat and fish	0.3	0.4	33.3
Milk, cheese, eggs and spread	10.3	10.1	-1.9
Chilled and frozen convenience	3.6	3.4	-5.6
Discretionary food and drink	37.8	36.4	-3.7
Other categories	5.3	6.6	24.5

	Food and drink categories contributing to take home purchase of total fat in Scotland		
Category	% of total fat purchase 2019	% of total fat purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	0.0	0.0	28.4
Fruit, vegetables and salads	2.1	2.3	9.5
Starchy foods	4.7	4.7	0.0
Cupboard and cooking ingredients	18.3	18.9	3.3
Total meat and fish	9.6	9.5	-1.0
Milk, cheese, eggs and spread	27.1	27.8	2.6
Chilled and frozen convenience	12.9	12.4	-3.9
Discretionary food and drink	23.4	22.8	-2.6
Other categories	1.9	1.6	-15.8

	Food and drink categories contributing to take home purchase of saturated fat in Scotland		
Category	% of saturated fat purchase 2019	% of saturated fat purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	0.0	0.0	29.2
Fruit, vegetables and salads	1.1	1.2	9.1
Starchy foods	2.8	2.9	3.6
Cupboard and cooking ingredients	7.9	8.2	3.8
Total meat and fish	8.9	8.6	-3.4
Milk, cheese, eggs and spread	34.4	35.3	2.6
Chilled and frozen convenience	11.3	10.8	-4.4
Discretionary food and drink	25.2	24.5	-2.8
Other categories	8.4	8.5	1.2

Category	Food and drink categories contributing to take home purchase of sodium in Scotland		
	% of sodium purchase 2019	% of sodium purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	0.2	0.3	50.0
Fruit, vegetables and salads	0.7	0.8	14.3
Starchy foods	9.7	9.6	-1.0
Cupboard and cooking ingredients	35.0	35.2	0.6
Total meat and fish	10.7	10.9	1.9
Milk, cheese, eggs and spread	12.4	12.8	3.2
Chilled and frozen convenience	14.2	13.6	-4.2
Discretionary food and drink	10.1	9.9	-2.0
Other categories	6.8	6.9	1.5

Category	Food and drink categories contributing to take home purchase of fibre in Scotland		
	% of fibre purchase 2019	% of fibre purchase 2020	% change 2020 vs. 2019
Alcoholic drinks	0.0	0.0	23.2
Fruit, vegetables and salads	23.1	23.2	0.4
Starchy foods	24.1	23.8	-1.2
Cupboard and cooking ingredients	12.3	12.4	0.8
Meat and fish	1.6	1.8	12.5
Milk, cheese, eggs and spread	0.8	0.9	12.5
Chilled and frozen convenience	14.1	13.9	-1.4
Discretionary food and drink	16.0	15.8	-1.3
Other categories	8.0	8.2	2.5

12.5 Annexe 5 – Discretionary food and drink categories contributing to take home purchase of nutrients in Scotland

	Discretionary food and drink categories contributing to take home purchase of calories in Scotland		
Category	% of calories purchase 2019	% of calories purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	4.0	4.1	2.2
Confectionery	5.9	5.8	-0.5
Total puddings and desserts	1.2	1.1	-5.4
Cakes and pastries	4.7	4.2	-9.8
Sweet biscuits	5.8	5.6	-3.9
Regular soft drinks	1.9	1.9	-4.5
Total	23.5	22.7	-3.4

	Discretionary food and drink categories contributing to take home purchase of total fat in Scotland		
Category	% of total fat purchase 2019	% of total fat purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	5.6	5.8	2.9
Confectionery	5.9	5.9	0.6
Total puddings and desserts	1.1	1.0	-7.5
Cakes and pastries	4.5	4.0	-11.1
Sweet biscuits	6.2	6.0	-3.7
Regular soft drinks	0.1	0.1	5.9
Total	23.4	22.8	-2.6

	Discretionary food and drink categories contributing to take home purchase of saturated fat in Scotland		
Category	% of saturated fat purchase 2019	% of saturated fat purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	1.6	1.7	5.2
Confectionery	8.8	8.9	0.3
Total puddings and desserts	1.7	1.6	-8.1
Cakes and pastries	4.8	4.3	-11.1
Sweet biscuits	8.1	7.8	-3.1
Regular soft drinks	0.2	0.2	3.9
Total	25.2	24.5	-3.2

	Discretionary food and drink categories contributing to take home purchase of total sugar in Scotland		
Category	% of total sugar purchase 2019	% of total sugar purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	0.6	0.6	1.4
Confectionery	13.5	13.5	0.6
Total puddings and desserts	2.2	2.0	-6.0
Cakes and pastries	6.3	5.6	-10.7
Sweet biscuits	7.4	7.2	-2.3
Regular soft drinks	7.8	7.5	-3.3
Total	37.8	36.4	-3.7

	Discretionary food and drink categories contributing to take home purchase of sodium in Scotland		
Category	% of sodium purchase 2019	% of sodium purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	3.5	3.5	-0.2
Confectionery	1.0	0.9	-5.4
Total puddings and desserts	0.4	0.4	-4.8
Cakes and pastries	2.4	2.3	-3.5
Sweet biscuits	2.3	2.3	-1.9
Regular soft drinks	0.5	0.5	-2.6
Total	10.1	9.9	-2.2

	Discretionary food and drink categories contributing to take home purchase of fibre in Scotland		
Category	% of fibre purchase 2019	% of fibre purchase 2020	% change 2020 vs. 2019
Crisps and savoury snacks	3.8	4.0	3.6
Confectionery	2.5	2.6	3.9
Total puddings and desserts	0.7	0.6	-6.0
Cakes and pastries	3.8	3.5	-7.5
Sweet biscuits	4.5	4.4	-3.1
Regular soft drinks	0.7	0.7	1.6
Total	16.0	15.8	-1.3

About Food Standards Scotland

Food Standards Scotland (FSS) is the public sector food body for Scotland. We are here to ensure that information and advice on food safety and standards, nutrition and labelling is independent, consistent, evidence-based and consumer-focused.

Our primary concern is consumer protection – making sure that food is safe to eat, ensuring consumers know what they are eating and improving nutrition. With that in mind, our vision is to deliver a food and drink environment in Scotland that benefits, protects and is trusted by consumers.

FSS was established by the Food (Scotland) Act 2015 as a non-ministerial office, part of the Scottish Administration, alongside but separate from the Scottish Government. We are mainly funded by the government but we also charge fees to recover costs for regulatory functions.

See more at: **foodstandards.gov.scot/about-us**

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