

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

Introduction

The impact of the COVID-19 pandemic has been unprecedented. With more people eating in the home due to restrictions throughout 2020, there have been changes in where and how we buy the food and drink that we eat at home. This briefing summarises the impact of COVID-19 on retail food and drink purchasing patterns in Scotland, during 2020, compared to 2019.

How was this data collected

The data in this report was provided by Kantar, a market research company who collect data from a large consumer panel, including around 2,650 panellists in Scotland who scan all products purchased from retail that are brought back into the home.

The data within this briefing refers only to food and drink that was purchased from the retail sector, such as supermarkets or convenience stores, and then taken into the home for consumption.

The data within this report does not measure changes to Out of Home (OOH) sector, such as restaurants, cafes or takeaways. Previous FSS data has shown that the COVID-19 pandemic and the associated restrictions meant that the value of the total OOH market in Scotland reduced by 36% in 2020, compared to 2019.

How did the food and drink landscape in Scotland change during 2020?

- The volume of total food and drink that people in Scotland purchased into the home increased by 8.2% in 2020 compared to 2019. The greatest peak was seen 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 the week before the first national lockdown, the number of occasions that people in Scotland shopped for food and drink was 43.0% higher compared to the same week in 2019. However, the overall number of occasions we shopped for food and drink decreased by 8.6% in 2020, compared to 2019.
- Spend on food and drink purchased into the home in 2020 was 12.6% (£1.1 billion) greater than in 2019. The greatest peak was observed the week immediately before the first national lockdown in 2020, when spend was 53.7% greater compared to the same week in 2019.
- Online food shopping occasions increased by 78.8% in 2020, compared to 2019, while the volume of total food and drink purchased into the home in this way increased by 63.9% during this time.

Purchase of calories and nutrients

- The take home purchase of energy (kcal), total sugar, fat, saturated fat and salt (excluding table salt) per person, per day increased in 2020, compared to 2019. Figure 1 presents this data, including the percentage change since 2014.

Figure 1: Take home purchase of energy, total sugar, fat, saturated fat and salt per capita, per day in Scotland (2014 – 2020)

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

- The take home purchase of energy per person, per day increased by 10.9% (241 kcal) in 2020, compared to 2019. The greatest increase was seen during the second quarter of 2020, after COVID-19 restrictions were introduced, with an increase of 16.8% compared to the second quarter of 2019.

Discretionary food and drink

Items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, and are optional in the diet.



- As shown in figure 2, discretionary food and drink products, such as confectionery and sweet biscuits, contributed almost a quarter of the calories (22.7%) and more than a third of total sugar (36.4%) purchased into the home during 2020.

Figure 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%



Purchase of food and drink categories by social class in 2020

- Discretionary food and drink products represented around 25.0% of all food and drink purchased into the home within social classes AB, C1, C2 and D. However, this increased to 29.9% of volume within social class E.
- Alcoholic drinks accounted for a greater proportion of total food and drink purchased in social class C1 (5.3%), compared to social class E (3.9%).
- Fruit, vegetables and salads accounted for a greater proportion of total food and drink purchased into the home amongst social classes AB (10.1%) and C1 (9.0%) compared to social classes D (8.3%) and E (8.4%).

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.



Purchase of food and drink on price promotions

- During 2020, 27% of total food and drink was purchased on a price promotion, compared to 2019. During this time, the majority of food and drink that was purchased on price promotion was done so through temporary price reduction, which is in line with previous FSS monitoring of price promotions.
- Food and drink purchased on a price promotion continues to be skewed towards less healthy categories, with discretionary food and drink (36.6%) purchased on price promotion at greater levels than non-discretionary foods (24.7%).

Purchase of food and drink categories

- The take home purchase of all 17 individual food and drink categories included within this report increased during 2020, in comparison to 2019.
- Food and drink categories which observed the greatest increase in volume purchased were store cupboard items, which tend to have long shelf lives, or items associated with enjoyment or pastimes, such as baking, during uncertain times.

Summary and conclusion

This report highlights an 8.2% 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 increases in volume, spend and trips to retail were observed during week 4 of March when the COVID-19 pandemic was building up to the first national lockdown being announced the following week.

Advice to stay home except for essential purposes, restrictions on socialising and the closure of schools and many workplaces meant that more people were eating inside the home, more often compared to normal. In addition, reports of panic buying at the beginning of the pandemic and changes in the way people did their grocery shopping, is likely to have contributed to changes in retail purchasing patterns.

This report complements and adds to the [evidence base](#) which supports action to limit the availability, advertising and price promotion of high fat/salt/sugar products. It also provides an important baseline from which to continue monitoring the ongoing impact of COVID-19 on our retail purchasing patterns in Scotland.

