Consumer State of the Nation:
How an 'unprecedented' 2020 impacted our food and drink consumption

Kantar

Usage panel

Data to 27th December 2020

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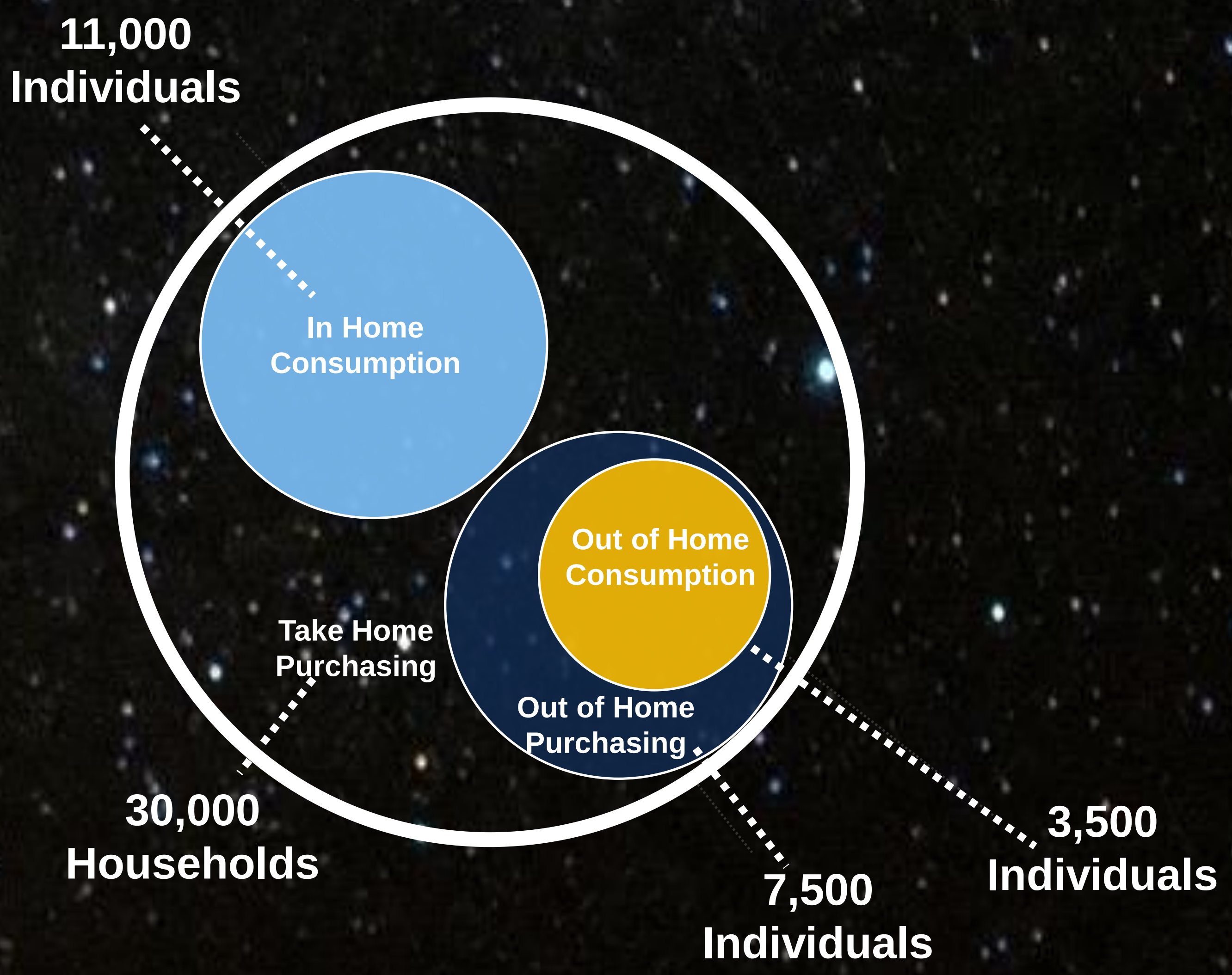
Background to the Kantar usage panel

- Kantar are a market research company who collect longitudinal information on purchases into the home from a large Great Britain (GB) household consumer panel of around 30,000 households. A subset of around 11,000 individuals from these households also record the food and drink they eat at home or carry out (around 1,000 in Scotland). This subset of the main purchasing panel is called the usage panel.
- The panel is demographically and geographically representative of the GB population. The collected data is then weighted up to reflect the full population in GB.
- Each panellist completes an average of 4 week long diaries each year, recording all the foods and drinks they consume at home or carry out. They also record information for all individuals in the household, including children.
- The usage panel collects information on how often foods and drinks are consumed, alongside information such as when, where and why foods were consumed. Panellists are not asked to weigh their food and therefore the data does not provide quantities of food and drink consumed.
- The usage panel does not include any food or drink purchased or consumed outside of the home (OOH), for example from restaurants, cafes, or ‘on the go’. This information is collected by another subset of the main purchasing panel, with 7,500 individuals in GB recording their OOH purchases*. Of this, 3,500 also record their OOH consumption.

* 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.

What panels do Kantar have and how do they interact?



GB panel numbers

panellist universe, not market universe

How does the usage panel work?

40,000 individual weekly diaries are completed across GB each year (approx. 3.5k from Scotland)	Each panellist completes an average of 4 week long online diaries each year	Panellists record all foods and drinks consumed at home or carry out
Information is recorded for all individuals in the household including children	Usage panel data is linked to purchasing from the wider take home purchase panel	Panellists are demographically representative of the GB population

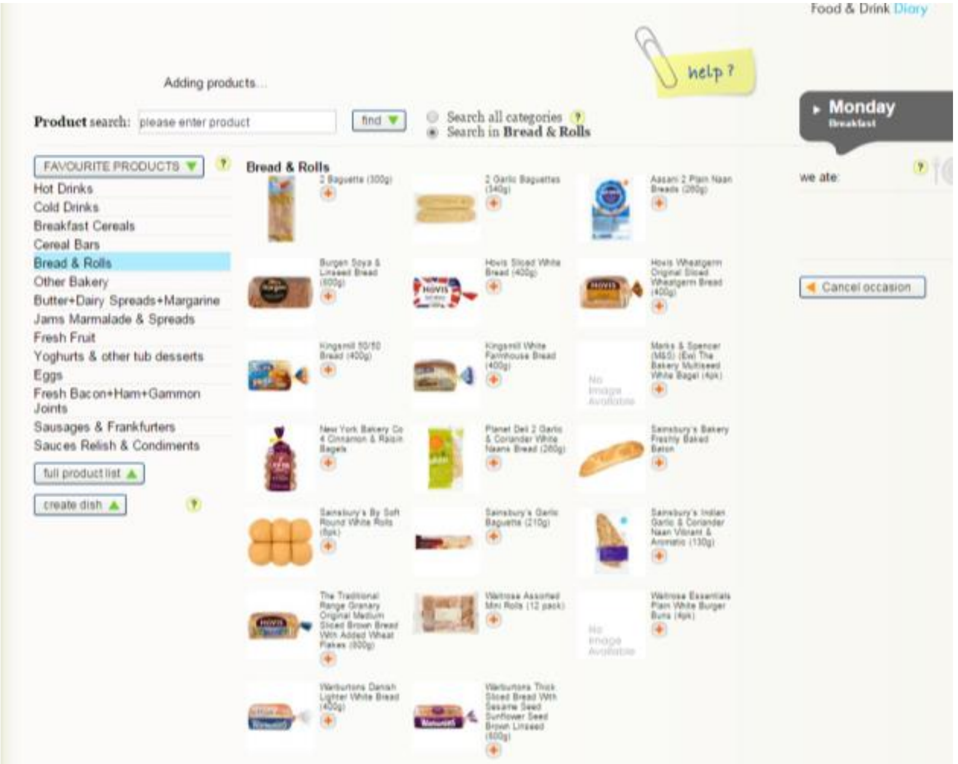
How does a panellist record what they eat?

Diary is filled out online on day of consumption for maximum recording accuracy

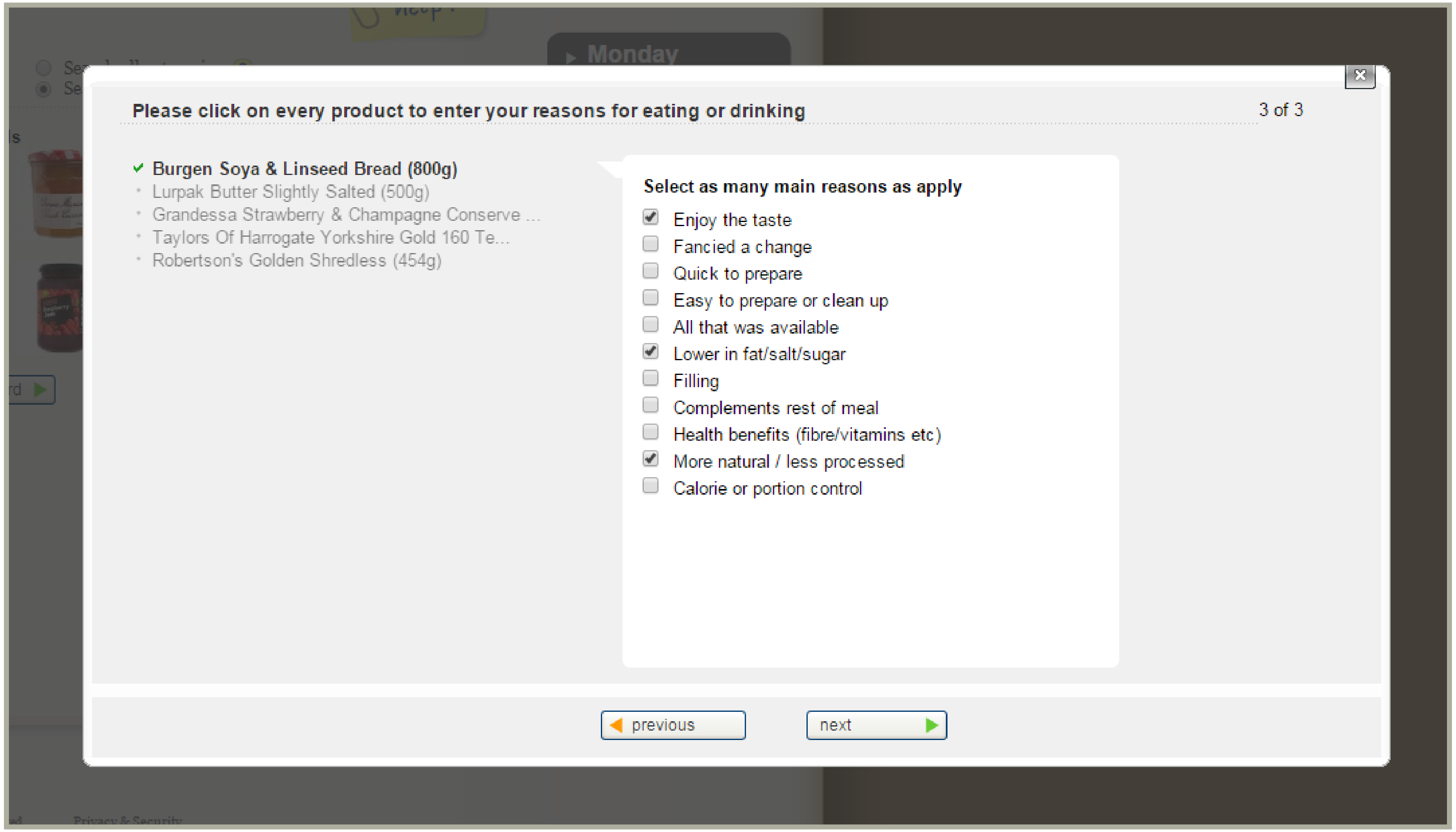
Panellists select day of week, followed by meal occasion

Products are selected from a ***virtual cupboard*** containing icons for all products purchased

This creates product level records of all food and drink consumption in-home



Panellists describe the occasion, the meal preparation and record their reasons for consuming



We are then able to report on a variety of measures…

Who

- Age
- Gender
- No. People Present
- Demographics
- Guests

What

- Dishes
- Compliment - ary Products
- GB Plate

When

- Occasions
- Type of Occasion
  Time of Day
- Days of Week

Where

- In Home
- Carried-out
- Lunchbox?

Why

- Needs States
- Needs Benchmark
- Motivations

How

- Prep Method
- Prep Time of the Occasion

Usage Panel

Throughout the presentation data is presented by the following demographics or characteristics:

Lifestage of buyer:

Under 45s, No Children
Age of main shopper is under 45 and there are no children in the household. This would include student households.

Families
A household containing children (anyone 15 and under)

Over 45s, No Children
Age of main shopper is over 45 and there are no children in the household. This is made up of Older Dependents (main shopper 45-64, 3+ people in HH), Empty Nesters (main shopper is 45-64, 1-2 people in HH) and Retirees.

Social Class

Class A
Upper Middle Class; Higher Managerial Position

Class B
Middle Class; Intermediate Managerial

Class C1
Lower Middle; Junior Managerial, Supervisory, Clerical Workers

Class C2
Skilled Working Class; Skilled Manual Workers, Craftsmen, Specialist

Class D
Working Class; Semi/Unskilled Manual Workers, Apprentices, Labourers

Class E
Non-working

The slide deck focuses on consumers’ behaviour in Scotland but additional data for GB has been used to provide further insights where Scotland data was not available. The relevant data source is identified by a marker in the top right hand corner of each slide.

Scotland

GB

Glossary of Terms

Occasions: An individual's eating or drinking moment. Note if a family of four all eat a meal this counts as four occasions.

Servings: As above but counting for each individual element of the meal. We use Servings when looking at need states because different elements of your meal we be for different needs.

Need States: Panellists select from a pre-defined list all relevant drivers of consumption.

Ate Out/OOH: When panellists fill in an occasion that took place out of the house they will select that they 'Ate Out'.

Carry out: Foods prepared at home and eaten outside of the home.

X w/e: The X number of weeks prior to the date given. For example, 4 w/e 27 Dec 20 would cover the 4 weeks from 30th November 2020 to 27th December 2020.

Older Dependents: Main shopper is over 45, there are no children but 3+ people present in the Household.

Empty Nesters: Main shopper is 45-65, there are no children but 1-2 people present in the Household.

Retired: Main shopper is over 65, there are no children but 1-2 people present in the Household.

PPT: Percentage point

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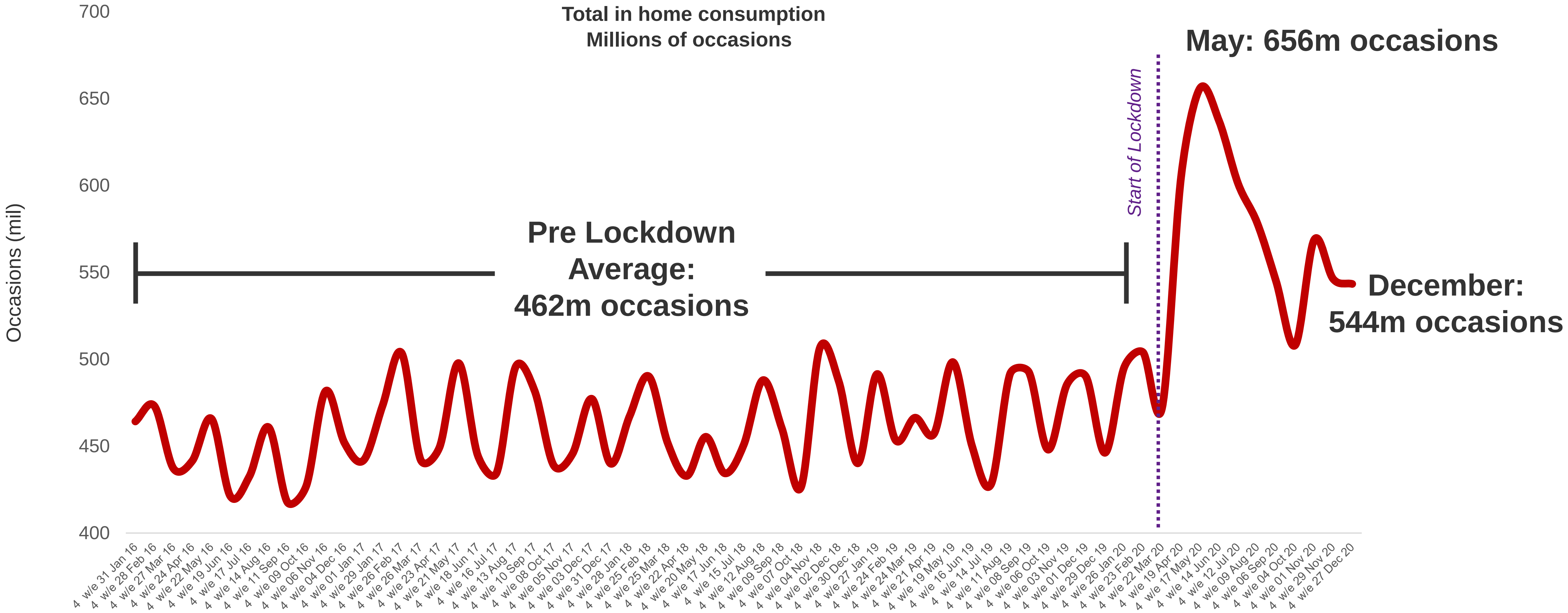
What happened to our consumption in 2020?

In-home occasions increased to ‘unprecedented’ levels after Scotland went into lockdown in Spring 2020, and did not return to pre-Covid levels following easing of restrictions.

Scotland



Looking in more detail throughout the year, 2020 can be broadly split into four different phases.

Pre Covid 12 w/e 22 Mar 20	1st National Lockdown 12 w/e 14 Jun 20	Transitions and Tiers 16 w/e 04 Oct 20	Pre Christmas 12 w/e 27 Dec 20

40 weeks of ‘post lockdown’ data available for analysis

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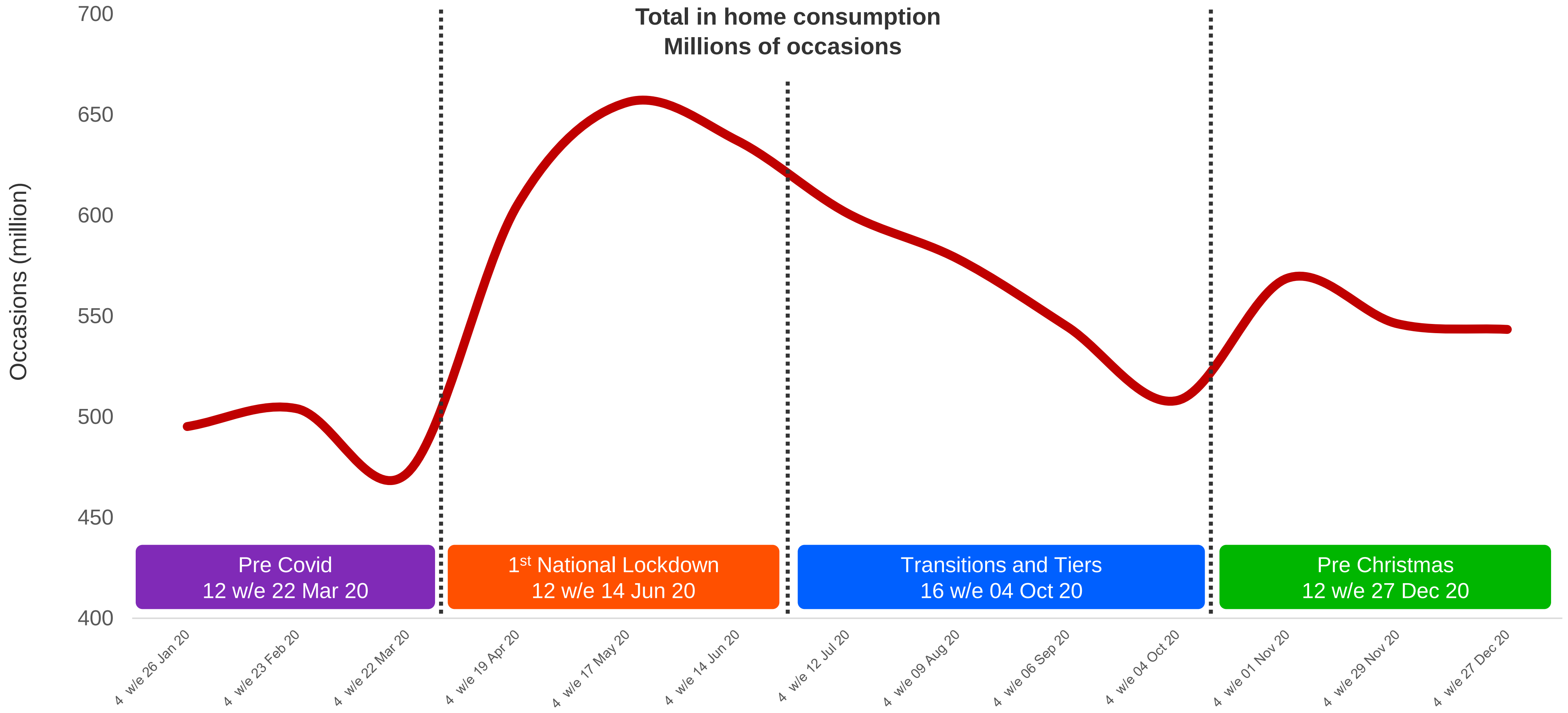
In-home occasions reached a peak of 656 million by May 2020. Although this declined through the ‘transitions and tiers’ phase, occasions remained higher than at the start of 2020.

Scotland



In the 40 weeks post-lockdown, in-home occasions increased by 23% in 2020 compared to 2019. Over the same time period, there were 58% fewer carried out occasions and 48% fewer eating out occasions.

Scotland

Eating in Home

23% more than pre lockdown (+1.1 b)

Carried Out of Home

58% less than pre lockdown (-194 m)

Ate Out

48% less than pre lockdown (-859 m)

Kantar Usage panel, Total Scotland, 40 w/e 27 Dec 20 vs. 40 w/e 29 Dec 19, total food & drink occasions

There were different levels of change in the number of in home occasions in 2020, depending on household demographics.

Scotland

	U45s, no children	Families	O45s, no children
1st National Lockdown 12 w/e 14 Jun 20	**+47% (+74m)** in home occasions vs. Year Ago	**+44% (+179m)** in home occasions vs. Year Ago	**+29% (+240m)** in home occasions vs. Year Ago
Transitions and Tiers 16 w/e 04 Oct 20	**-2% (-5m)**	**+24% (+151m)**	**+22% (+226m)**
Pre Christmas 12 w/e 27 Dec 20	**+17% (+24m)**	**+23% (+103m)**	**+14% (+110m)**

The impact also varied by time of day. Lunch increased the most with 59% more in-home occasions in 2020 compared to 2019. In-home snacking occasions increased by 31%, while evening meals increased by 12% and breakfast by 8%.

Scotland

Breakfast

+8%

+3m occs per week

Lunch

+59%

+9m occs per week

Evening Meal

+12%

+3m occs per week

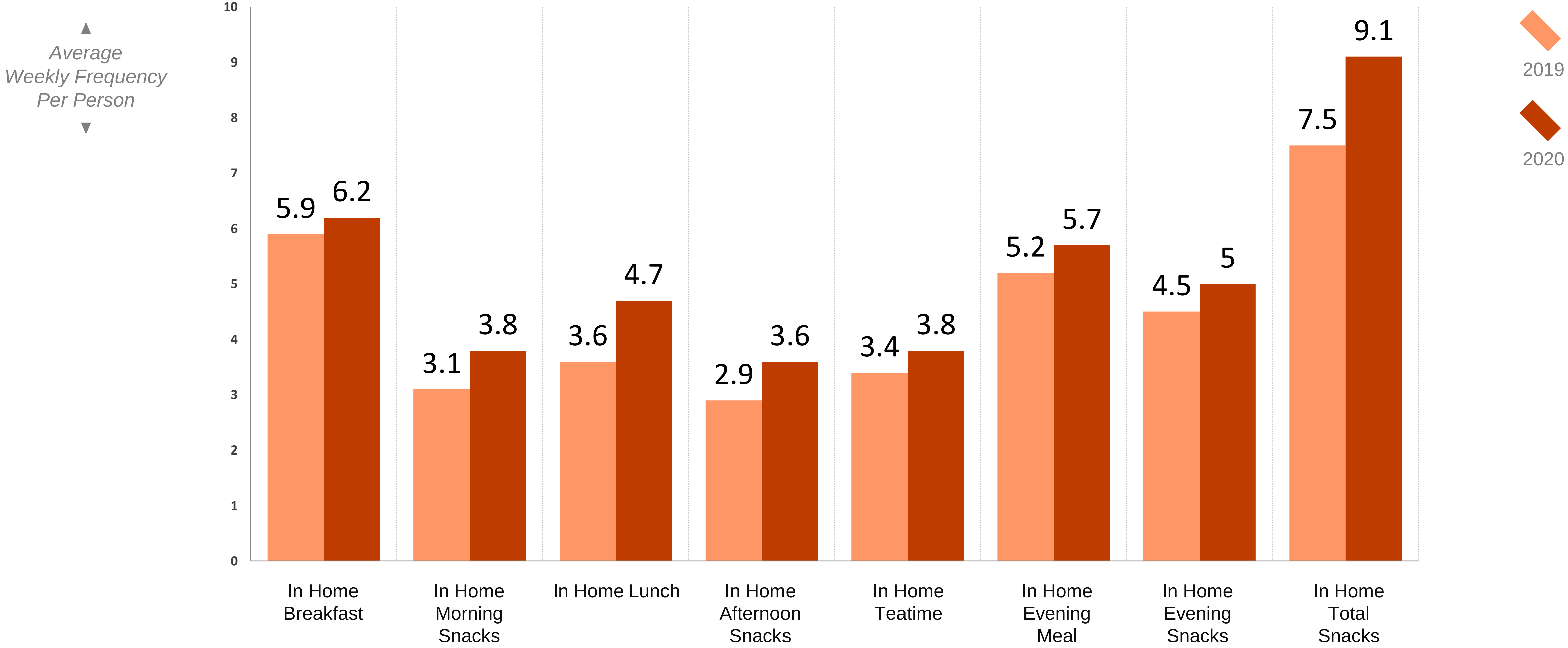
Snacking

+31%

+11m occs per week

In 2020, there was around one extra lunch and an additional one and a half snacks consumed at home each week.

Scotland



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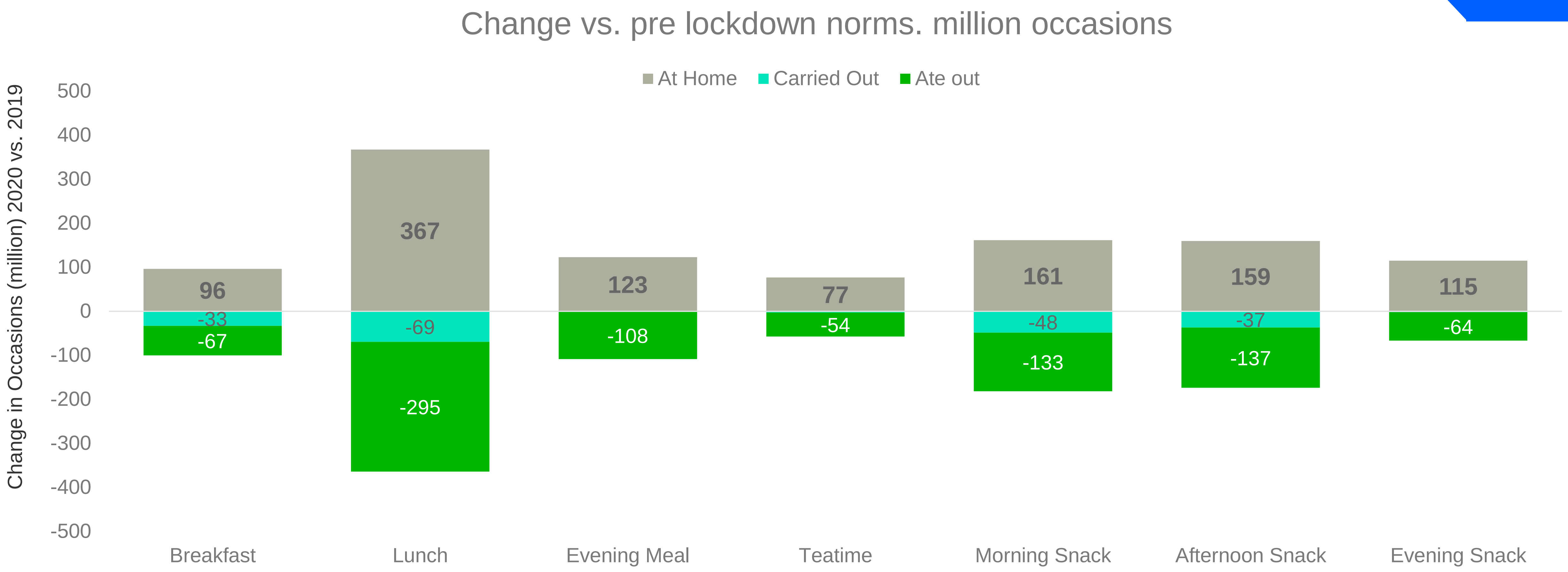
Although there have been increases in the number of in-home occasions in 2020, these are less pronounced when we take the 'lost' occasions from eating out and carrying out. Overall, this means that the biggest changes were seen at 'tea time' and for 'evening snacks'.

Scotland



% Change in overall occasions 40w/e vs. 2019:	Breakfast	Lunch	Evening Meal	Teatime	Morning Snack	Afternoon Snack	Evening Snack
	-0.3%	+0.2%	+1.1%	+3.9%	-3.2%	-2.1%	+5.7%

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Kantar Usage panel, Total Scotland, 40 w/e 27 Dec 20 vs. 40 w/e 29 Dec 19, total food & drink occasions

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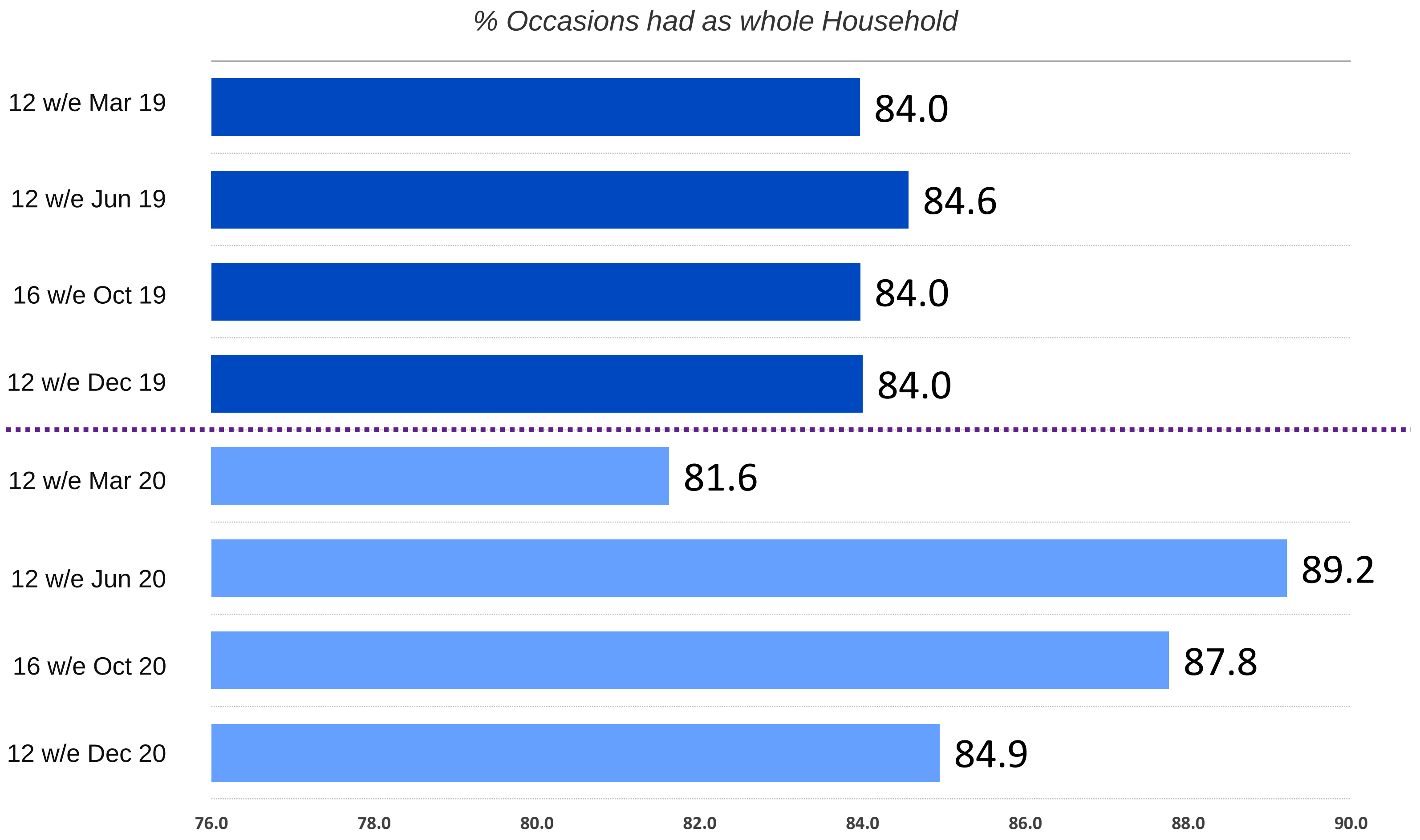
The impact of spending more time at home on our food choices

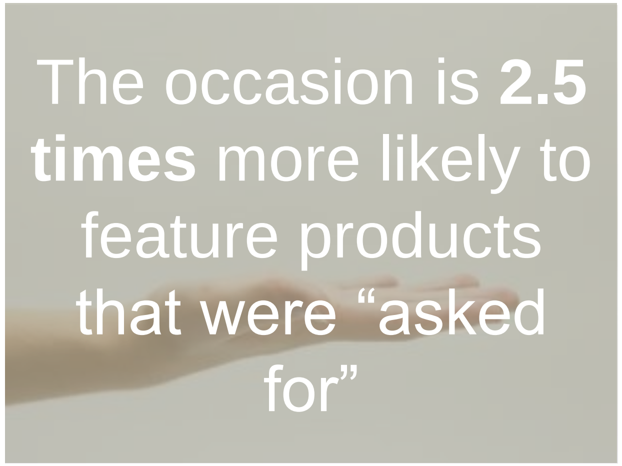
After the national lockdown was announced, there was an increase in the proportion of occasions where the entire household was present. In the 12 weeks after lockdown, almost 90% of occasions had all members of the household present.



Kantar Usage panel, Total Scotland, total food & drink occasions where everyone in a Household is present, in home & carried out

Compared to a 1 or 2 person occasion, when 3 or more people in the household eat together:

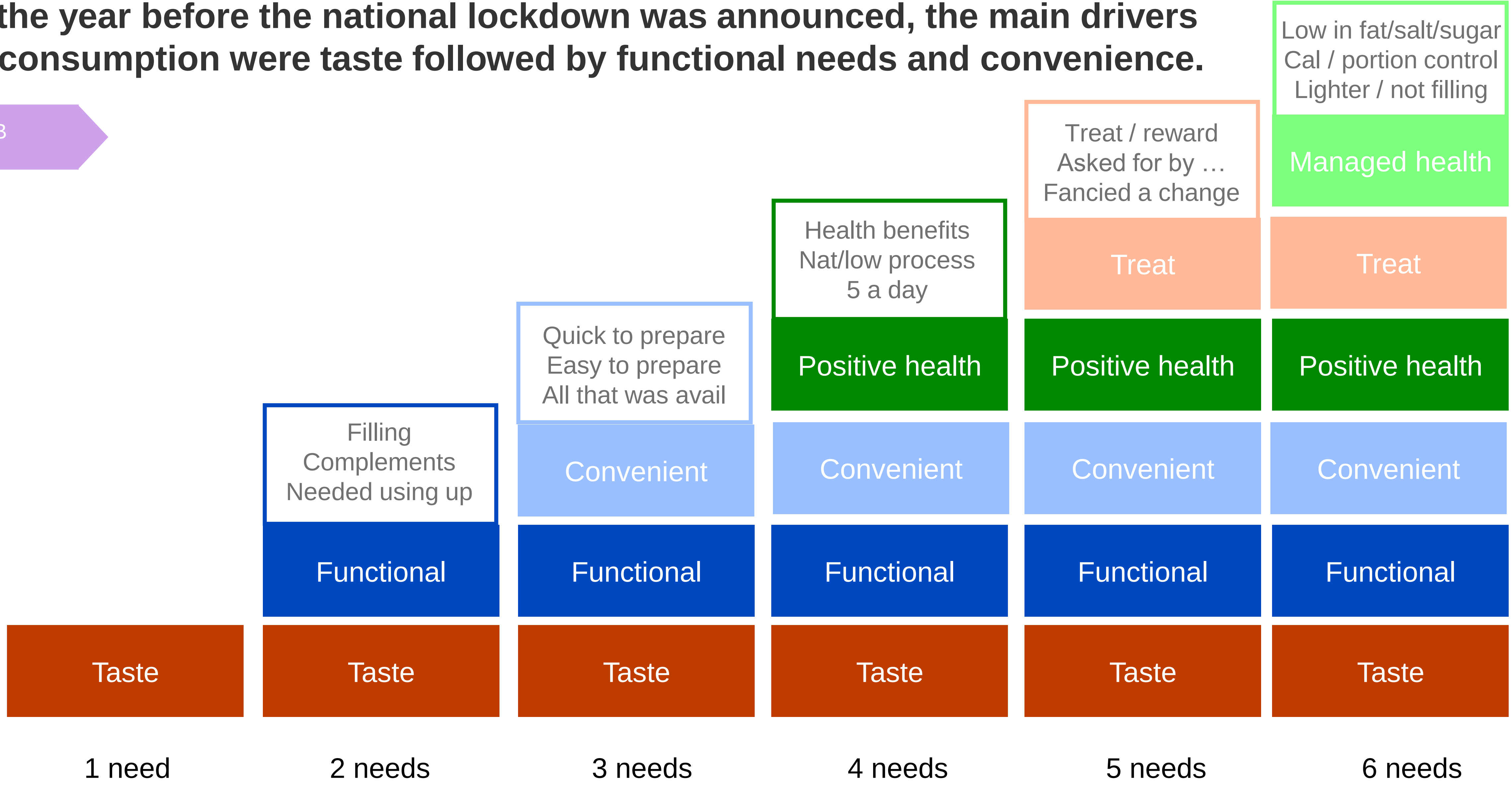
Scotland



Panellists were slightly less likely to describe their occasion as **“Together Time”** in 2020 vs 2019
(9.7% in 2020 vs. 10.1% in 2019)

In the year before the national lockdown was announced, the main drivers of consumption were taste followed by functional needs and convenience.

GB



Kantar Usage Panel, Total GB, 52w/e 22nd Mar 20, in home & carried out Total Food & Drink

In the 40 weeks after the national lockdown in 2020, taste and functional needs remained top drivers of consumption. However "treating" emerged as more important over this time, superseding convenience and positive health.

GB

1 need	2 needs	3 needs	4 needs	5 needs	6 needs
					Low in fat/salt/sugar Cal / portion control Lighter / not filling
					Managed health
				Quick to prepare Easy to prepare All that was avail	
			Health benefits Nat/low process 5 a day	Convenient	Convenient
		Treat / reward Asked for by … Fancied a change	Positive health	Positive health	Positive health
	Filling Complements Needed using up	Treat	Treat	Treat	Treat
	Functional	Functional	Functional	Functional	Functional
Taste	Taste	Taste	Taste	Taste	Taste

71% of occasions in 2020 were driven by taste, compared to 16% being driven by potential benefits to health.

Scotland

Need State	Servings % in 2020	Change in ppts vs. 2019
Enjoy the taste	71.3	0.7
Filling	20.8	0.7
Health benefits(fibre/vitamins)	16.2	-0.7
Easy to prepare or clear up	15.8	-0.9
More natural/less processed	13.3	-0.7
Refreshing	12.5	-0.4
Fancied a change	11.9	-0.1
Lower in fat/salt/sugar	9.9	-1.4
A treat or reward	8.3	-0.2
Complements rest of meal	8	-0.2

During lockdown there has been an overall shift to fewer 'needs' being selected, despite the fact that the cost of an occasions increases by +25% with every need selected

In the 40 weeks after the national lockdown was announced in 2020, there were over **160m more** meals made using the oven compared to the year before (+22.1%)

The number of occasions using the microwave grew by **89m** over the same time period (+19.6%)

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Kantar Usage Panel, Total Scotland, 40 w/e 27 Dec 20 vs. YA, in home & carried out

The amount of time spent making meals after the national lockdown in 2020 was slightly longer than the same period in 2019, but this change was minimal.

Scotland

Breakfast 7 ½ minutes (½ minute more)

Lunch 12 mins (½ minute more)

Evening meal 33 mins (1 minute more)

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The rise of ‘treatier’ behaviours

Scotland

There was an increase in a number of more "treat" led behaviours in the 40 weeks after the national lockdown was announced in 2020.

Snacking at home

+31% (+437m)
occasions
vs. Year Ago

"Treat" main course

+23% (+7m)
occasions
vs. Year Ago

Dessert course

+31% (+168m)
occasions
vs. Year Ago

Alcohol at home

+35% (+61m)
occasions
vs. Year Ago

Snacking

Snacking

Snacking includes all foods or drinks a panellist consumes and describes as a ‘snack’. Therefore, this section includes healthier snack foods such as fruit or toast in addition to less healthy snack foods such as biscuits or confectionery.

Snacking can also include drinks which a panellist consumes during a snack occasion.

+437 million

More snack occasions in home post lockdown vs. the same time in 2019 (+31%)…

…however when including the losses out of home, change is minimal with growth at +1%.

Families had the biggest increase in snacking occasions at home. In the first 12 weeks after the national lockdown in 2020, families had 73% more in-home snacking occasions compared to the previous year.

Scotland

	U45s, no children	Families	O45s, no children
1st National Lockdown 12 w/e 14 Jun 20	**+58% (+25m)** in home occasions vs. year ago	**+73% (+77m)** in home occasions vs. year ago	**+34% (+94m)** in home occasions vs. year ago
Transitions and Tiers 16 w/e 04 Oct 20	**+2% (+1m)**	**+38% (+56m)**	**+29% (+96m)**
Pre Christmas 12 w/e 27 Dec 20	**+0%**	**+31% (+37m)**	**+19% (+51m)**

The growth in in-home snacking occasions also varied by time of day. In the first 12 weeks after the national lockdown in 2020, morning snacking in home increased by 81% whilst afternoon snacking in home increased by 72%.

Scotland

Morning snacking

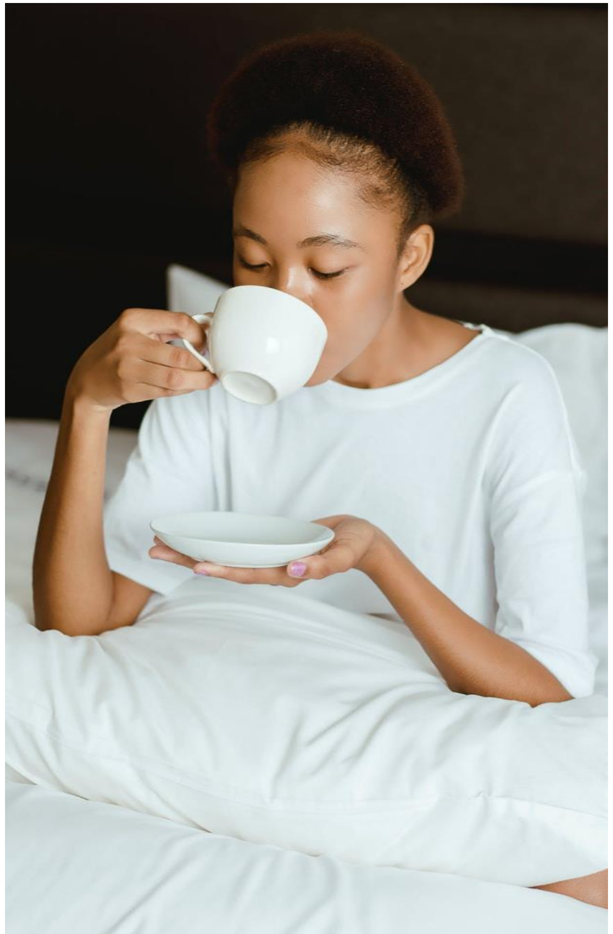
Afternoon snacking

Evening snacking

	Morning snacking	Afternoon snacking	Evening snacking
1st National Lockdown 12 w/e 14 Jun 20	**+81% (+73m)** in home occasions vs. year ago	**+72% (+78m)** in home occasions vs. year ago	**+20% (+46m)** in home occasions vs. year ago
Transitions and Tiers 16 w/e 04 Oct 20	**+49% (+58m)**	**+39% (+54m)**	**+14% (+40m)**
Pre Christmas 12 w/e 27 Dec 20	**+33% (+31m)**	**+25% (+27m)**	**+13% (+30m)**

Drinks accounted for the greatest share of snack occasions in 2020. Fruit was chosen on 13% of in-home snack occasions and chocolate confectionery on 6.3%.

Food or drink	Snack Occasions % in 2020
Tea	25
Instant Coffee	18.7
Milk	17.5
Fruit	13.3
Chocolate Confectionery	6.3
Everyday Biscuits	5.9
Food Drinks (e.g Hot Chocolate)	5.8
Savoury Snacks	5.3
Fruit Squash	5.3
Ground Coffee + Beans	4.9



Kantar Usage Panel, 52w/e 22nd Mar 20, Total In Home/Carried Out Food & Drink Snack Occasions, Total Scotland

In-home consumption of discretionary products grew strongly in the 40 weeks after the national lockdown was announced in 2020. This ranged from a 14% increase for confectionery to 36% for soft drinks. Similarly, there were 37% more in-home occasions which included alcoholic drinks over this time.

Crisps & Savoury Snacks	Confectionery	Biscuits	Cakes & Pastries	Soft Drinks	Alcohol
+30%	**+14%**	**+32%**	**+19%**	**+36%**	**+37%**
+51m occasions	+18m occasions	+72m occasions	+17m occasions	+102m occasions	+24m occasions

In-home snack occasions featuring fruit grew faster than any other category (+47%) after the national lockdown was announced.

Fruit at Snack Occasions

+47%

+78m Occasions

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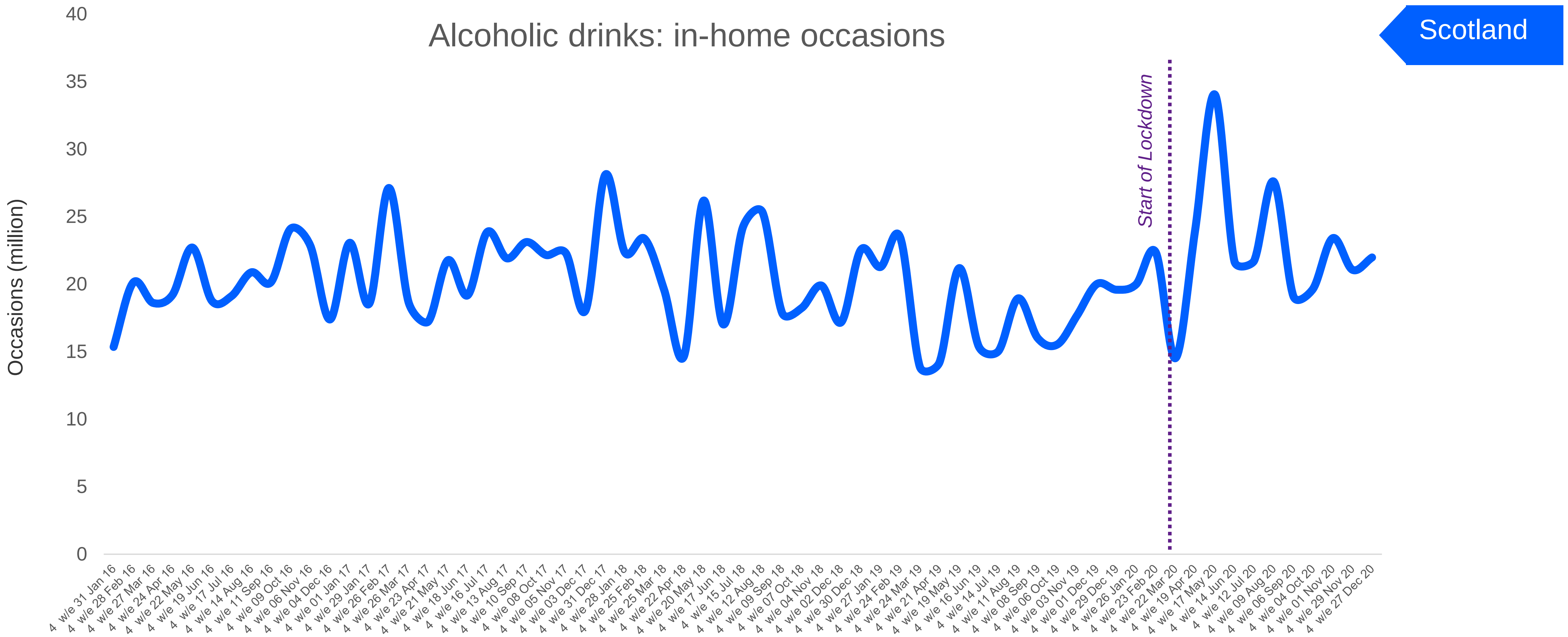
Alcoholic drinks at home

Consumption of alcoholic drinks increased in the initial period following the national lockdown in 2020, peaking at 34 million occasions in May 2020.



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Families increased their consumption of alcoholic drinks at home by 69% in the first 12 weeks after the national lockdown was announced, however consumption by the end of the year was 17% lower than the same point in 2019.

	U45s, no children	Families	O45s, no children
1st National Lockdown 12 w/e 14 Jun 20	**+13% (+1m)** in home occasions vs. year ago	**+69% (+4m)** in home occasions vs. year ago	**+61% (+24m)** in home occasions vs. year ago
Transitions and Tiers 16 w/e 04 Oct 20	**+9% (+400k)**	**+36% (+4m)**	**+36% (+19m)**
Pre Christmas 12 w/e 27 Dec 20	**+40% (+2m)**	**-17% (-2m)**	**+21% (+9m)**

The strongest growing driver for consumption of alcoholic drinks in-home in 2020 was **“Relaxation/Wind Down”**

(39.6% servings in 2020 vs. 35.3% in 2019)

“Enjoy the Taste” was the second most important driver.

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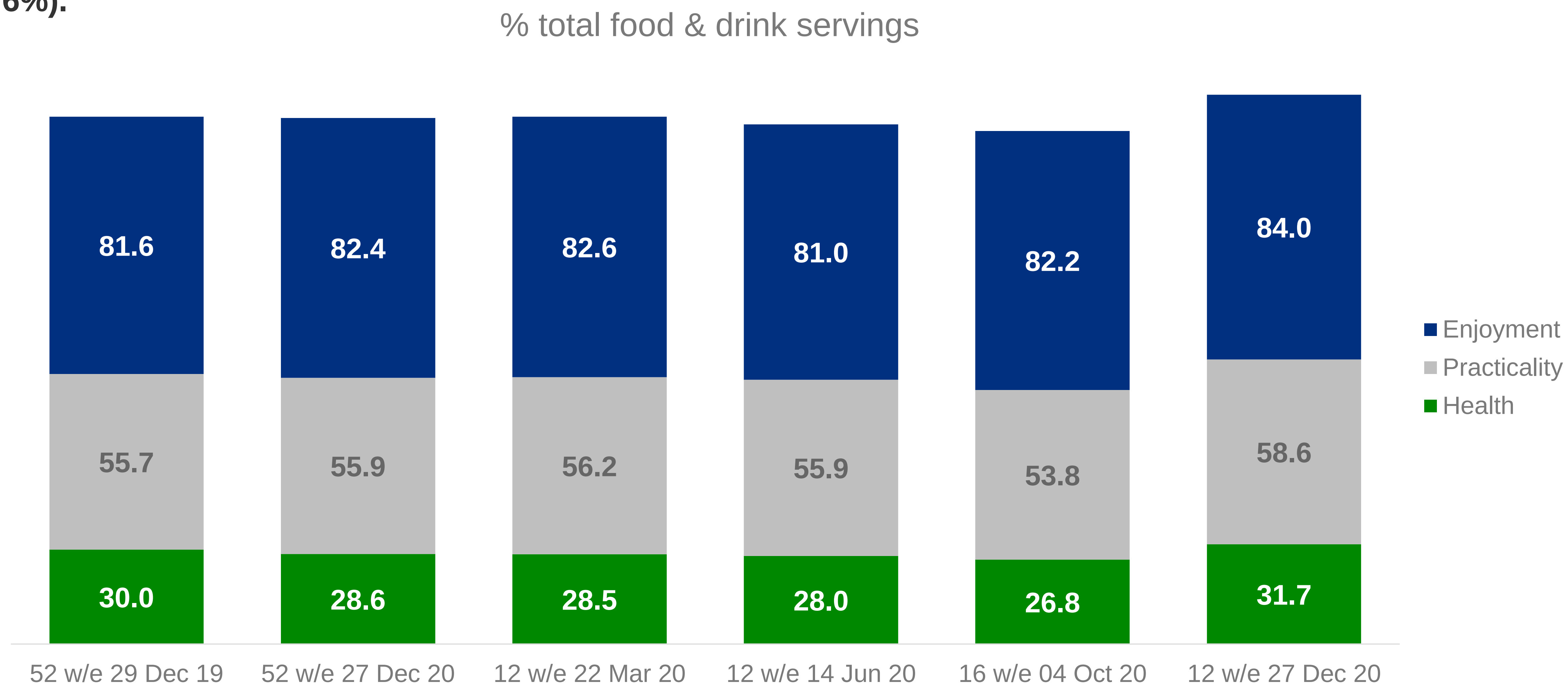
How has health as a driver of consumption changed?

The importance of health as a driver of consumption fluctuated throughout 2020, ranging from a low of 28% during the first 12 weeks of lockdown to a high of almost 32% during the pre-Christmas period. Overall this resulted in a small decline between 2019 and 2020 (30.0% vs. 28.6%).

Scotland



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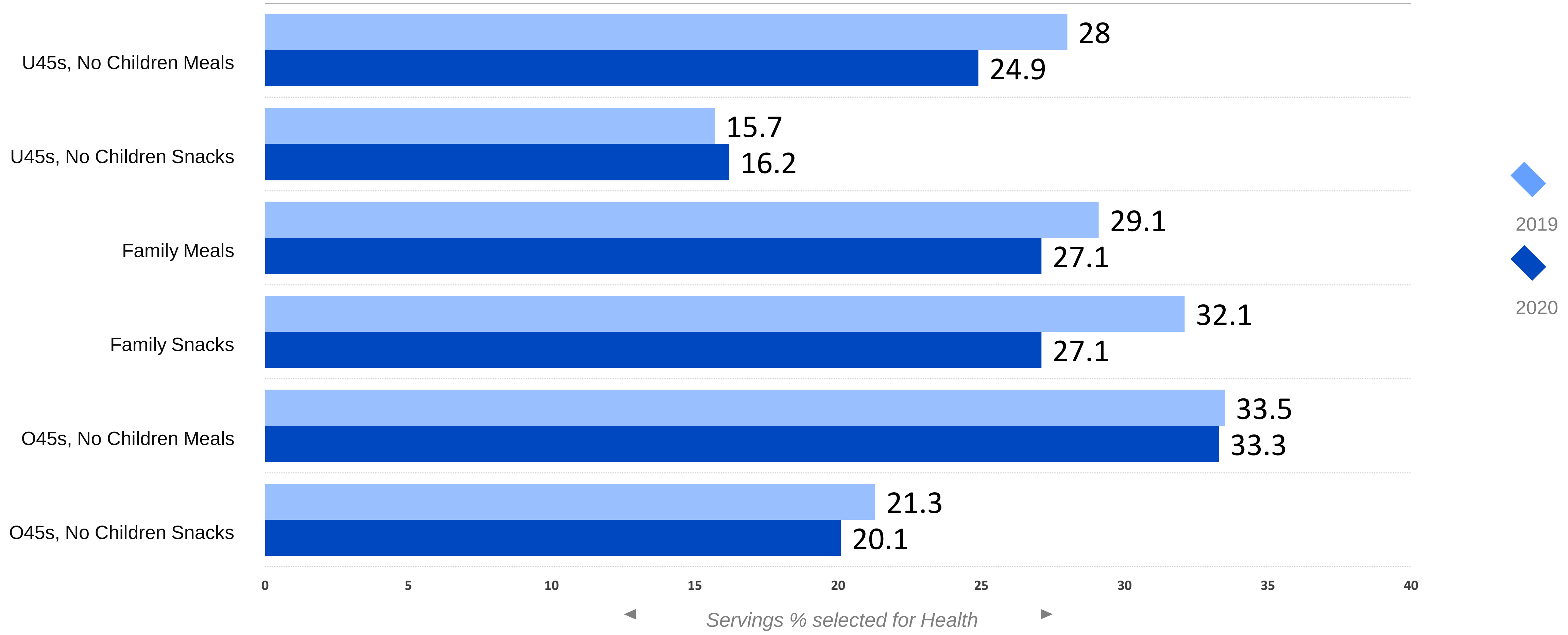
Health as a driver of consumption at meal times declined between 2019 and 2020, particularly within families and under 45 households with no children. Health also declined as a driver for snack consumption within families, dropping from 32.1% of occasions in 2019 to 27.1% in 2020.



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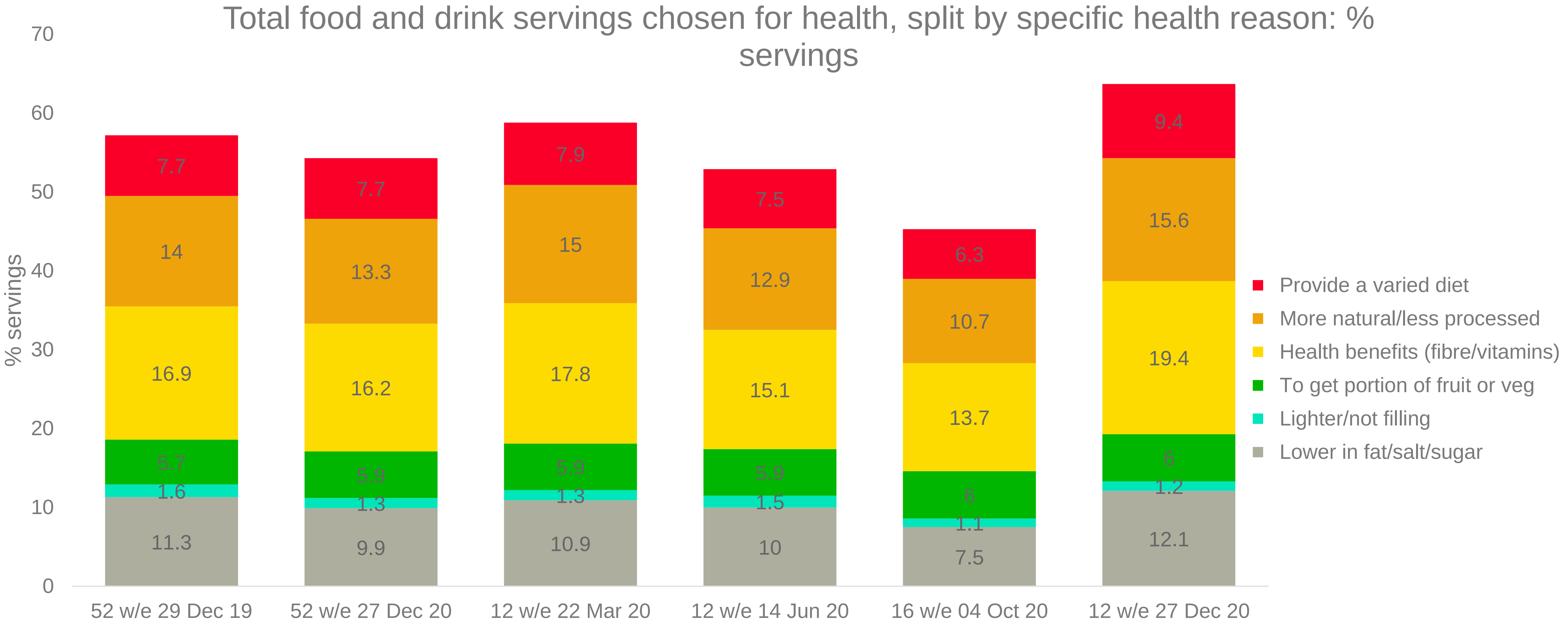
Most health related drivers of consumption fluctuated throughout 2020, however ‘health benefits’ and ‘more natural/less processed’ remained the most common despite dropping slightly since 2019.

Scotland



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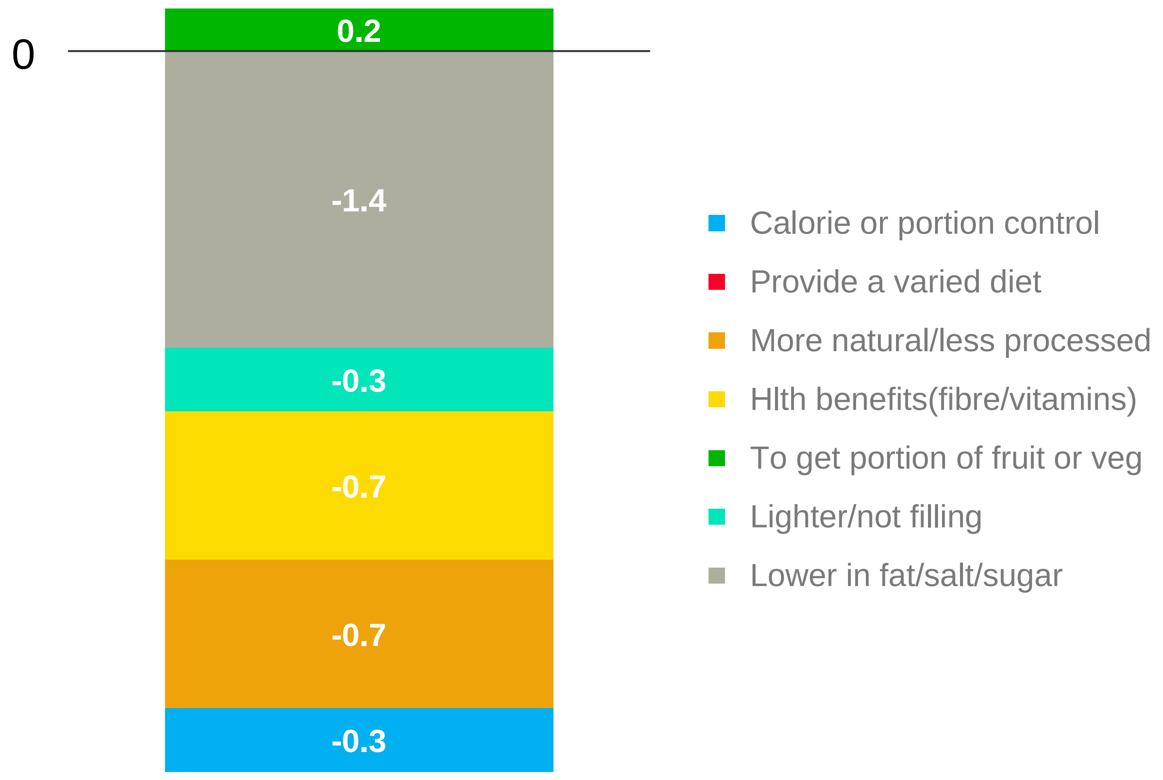
All health related reasons for consumption decreased in 2020 compared to 2019, with the exception of ‘to get a portion of fruit or veg’.

% point change in health reasons in 2020 vs. yr. ago total food & drink servings



Bananas were the most frequently consumed fruit in 2020, with an average weekly frequency of 3.2 occasions.

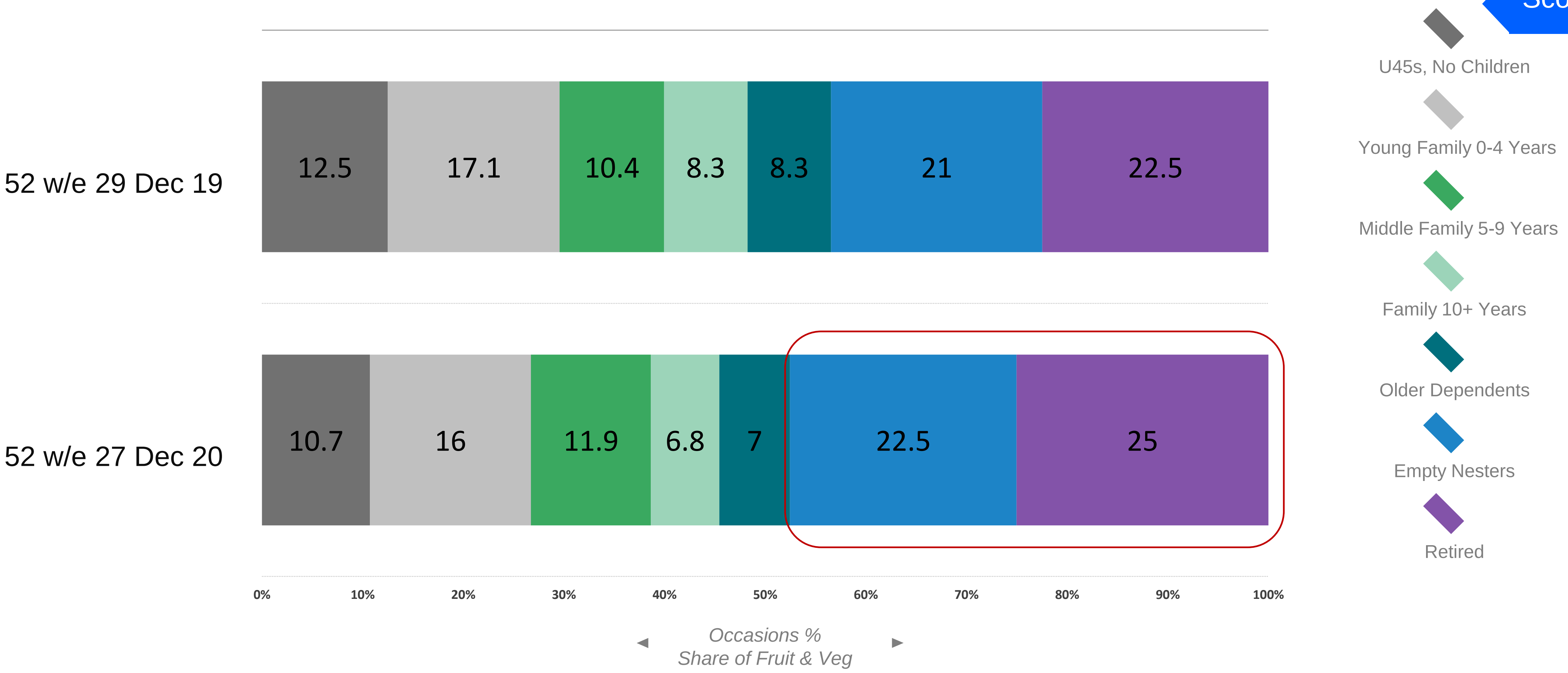
Fruit	% of fruit occasions	Change in % points 2020 vs. 2019	Weekly Frequency
Banana	35	-1.4	3.2
Apples	19.7	0.4	2.6
Berries + Currants	17	1.7	2.8
Easy Peelers	7.8	1	2.3
Grape-Red	6.1	1.8	2.8
Pears	5.3	1.4	2.6
Orange	3.9	0.7	2.0
Baking Fruits	3.1	-1.1	2.4
Lemon	2.5	0	2.0
Grape-White	2.4	-0.6	1.8

Onions were the most frequently consumed vegetable, with an average weekly frequency of 2.9 occasions.

Vegetable	% of veg occasions	Change in ppts 2020 vs. 2019	Weekly Frequency
Onions	30.4	2.3	2.9
Carrots	23.6	1.8	2.4
Old Potatoes	21.3	1.1	2.4
Tomato	20.2	0.1	2.7
Peppers	11.4	0.1	1.8
Cucumber	9.4	0	2.1
Mushroom	8.7	0.5	1.9
Peas	8.7	-0.4	1.4
Baking Potatoes	7.9	-1.2	2.0
Sweetcorn	7.3	-0.3	1.7

Older life stages were largely responsible for driving the uplift of fruit & veg occasions in 2020 compared with 2019.

Scotland



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How have our meals & how we prepare them changed?

How “effort” is defined in meal preparation:

Scotland

Scratch cooking

Home made dishes

e.g. spag bol, curry, chillies where the sauce is made, home made pies, home made soups

Assisted cooking

Cooking sauces & meal kits used

e.g. spag bol but with a jar of sauce

Assembled meals

Where multiple items are bought together on a plate

e.g. sandwiches, fish & chips, salad

Convenience meals

Prepared pizzas (but cooked at home) & ready meals

Delivered takeaway

e.g. Deliveroo, Uber Eats etc.

Cooking effort impacts both on time spent and cost per person. Assembled meals in 2020 took the least amount of time and were the cheapest (17 mins and £1.31 per person). Cooking from scratch took the longest per occasion (42 mins) and delivered takeaways was the most expensive (£8.14 per person).

Scratch cooking	Assisted cooking	Assembled meals	Convenience meals	Delivered takeaway
42 mins	35 mins	17 mins	27 mins	n/a mins
£1.49 per person	£1.92	£1.31	£2.16	£8.14

"Cost"

"Effort"

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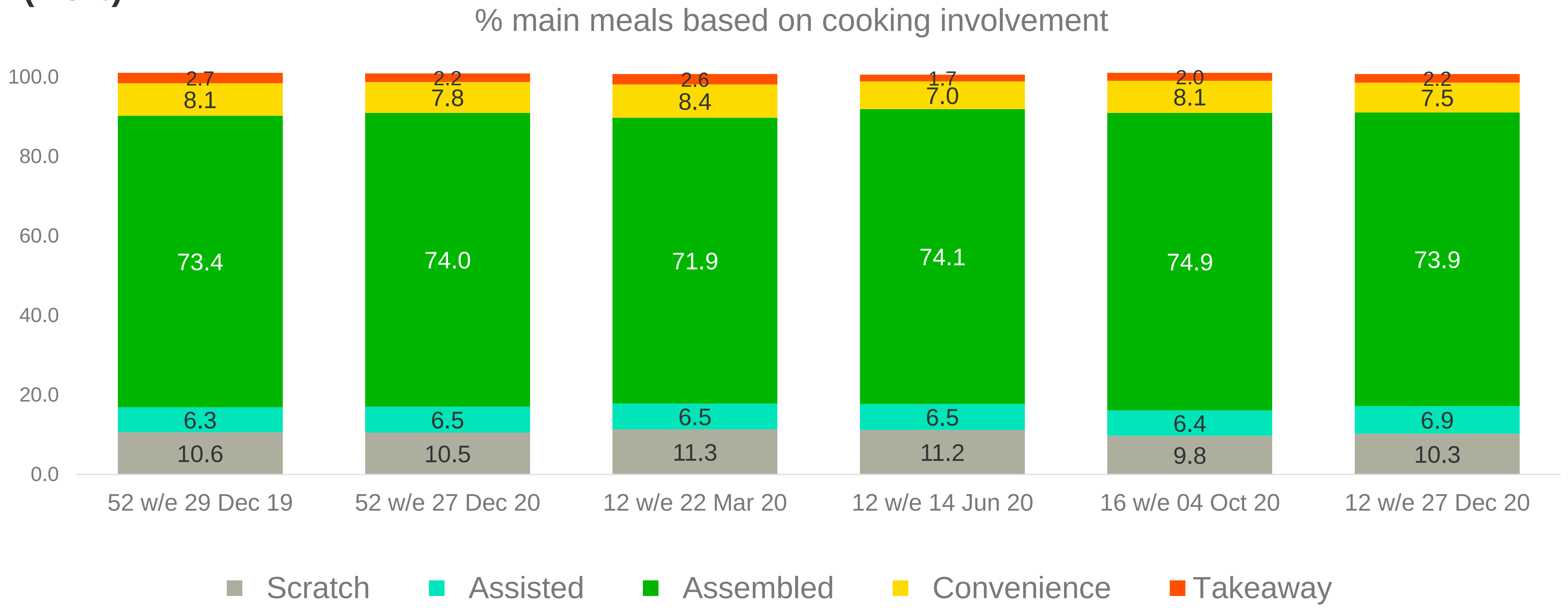
Kantar Usage panel, Total Scotland, 52w/e 27th Dec 20, lunch & evening meals by prep method, av. Prep time & £ per person per occasion in home & carried out, savoury food

There were only slight differences in approaches to cooking in 2020 compared to 2019. Assembled cooking continued to account for the largest proportion of main meals in 2020 (74%), followed by scratch cooking (10.5%) and convenience cooking (7.8%).

Scotland



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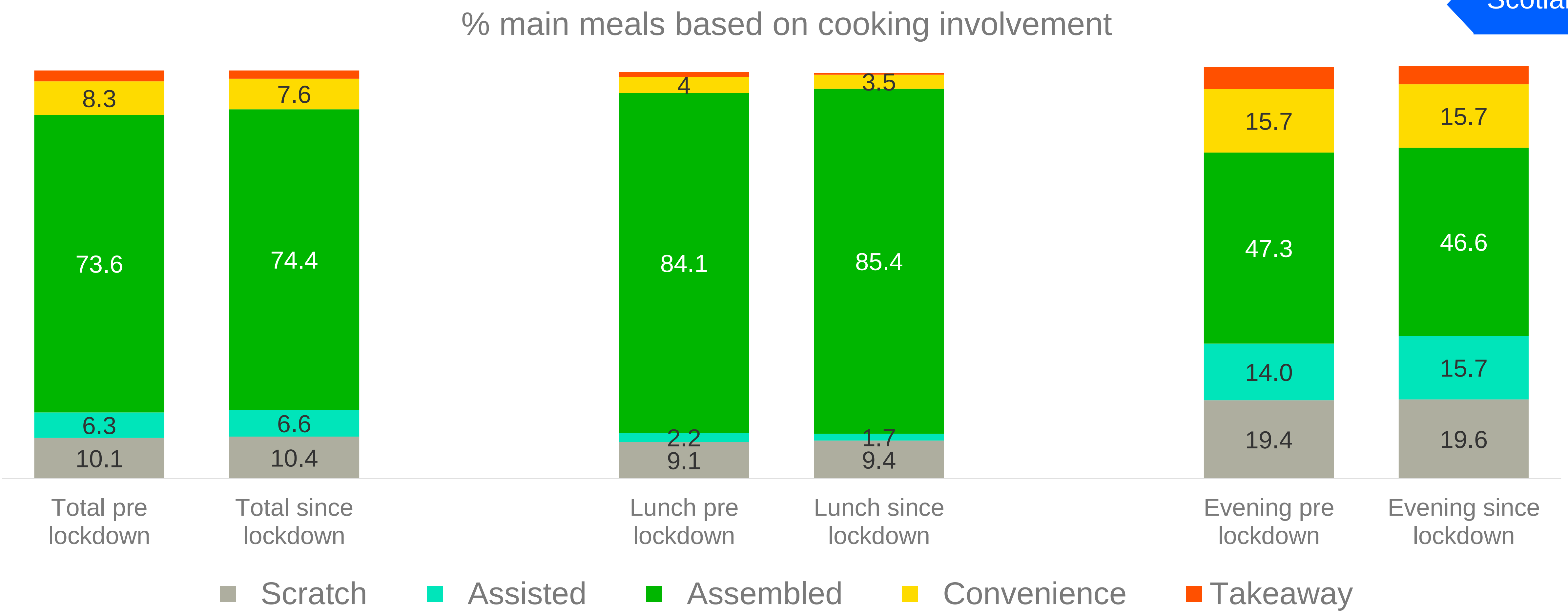
Kantar Usage panel, Total Scotland, % savoury food occasions, lunch & evening meals, in home & carried out

Scratch or assisted cooking were more likely for evening meals whereas assembled cooking was accounted for the majority of lunch meals. Assisted cooking of evening meals increased from 14% pre lockdown to 15.7% after the national lockdown was announced in 2020.

Scotland



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Over 45 households with no children increased their engagement with scratch cooking throughout 2020. In the first 12 weeks after the national lockdown was announced in 2020, these households were 37% more likely to make their main meals from scratch compared to the same time point in the previous year.

Scotland

	 U45s, no children	 Families	 O45s, no children
1st National Lockdown 12 w/e 14 Jun 20	**-9%** Less likely to scratch cook main meals vs. year ago	**-18%** Less likely to scratch cook main meals vs. year ago	**37%** More likely to scratch cook main meals vs. year ago
Transitions and Tiers 16 w/e 04 Oct 20	**-25%**	**+2%**	**+11%**
Pre Christmas 12 w/e 27 Dec 20	**-34%**	**-2%**	**+2%**

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Top 2020 Lunch Dishes

Scotland

Sandwiches
(36% of lunch)

Soup
(16% of lunch)

Toast Meals
(4% of lunch)

Pies/Pasties/Sav Puds
(4% of lunch)

Cooked Meats
(4% of lunch)

Italian Foods
(2% of lunch)

Chicken Portions
(2% of lunch)

Pizza
(2% of lunch)

Bacon (ex. Sandwich)
(2% of lunch)

Salads
(1% of lunch)

Kantar Usage panel, Total Scotland, 52 w/e 27 Dec 20, share of total food at lunch meal occasions

Change in top lunch dishes between 2019 and 2020:

Scotland

Sandwiches (36%)
-2.1ppt share of 2020 Lunches vs. 2019

Soup (16%)
+1.5ppt share of 2020 Lunches vs. 2019

Toast Meals (4%)
+0.5ppt share of 2020 Lunches vs. 2019

Pies/Pasties (4%)
+0.4ppt share of 2020 Lunches vs. 2019

Cooked Meats (4%)
+0.4ppt share of 2020 Lunches vs. 2019

Italian Foods (2%)
-0.1ppt share of 2020 Lunches vs. 2019

Chicken Portions (2%)
0.0 ppt share of 2020 Lunches vs. 2019

Pizza (2%)
+0.1ppt share of 2020 Lunches vs. 2019

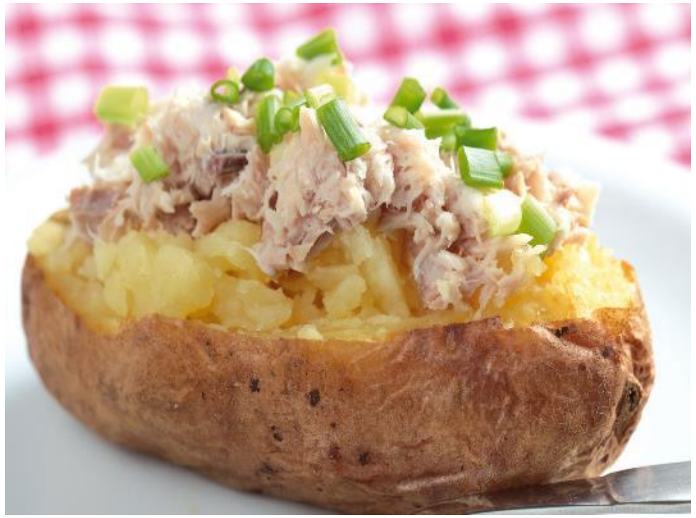
Bacon (2%)
+0.2 ppt share of 2020 Lunches vs. 2019

Salads (1%)
-0.6ppt share of 2020 Lunches vs. 2019

KANTAR

Kantar Usage panel, Total Scotland, 52 w/e 27 Dec 20 vs. YA, share of total food at lunch meal occasions

Baked potato meals and omelettes as lunch choices also grew strongly in 2020 compared to 2019.



Baked potato meals

+14%

6 million - 0.5% of lunches

Omelette

+79%

7 million - 0.6% of lunches

KANTAR

Kantar Usage panel, Total Scotland, 52 w/e 27 Dec 20, share of total food at lunch meal occasions

62% of lunches featured **something hot** in the 40 weeks since the national lockdown was announced in 2020 (vs. 56% previously)

However this was **not driven by the microwave** (falling 0.7ppts vs. last year) and more so by hob (+3.6ppts), grills/toasters (+2.3ppts) and the oven (+2.2ppts)

KANTAR

Kantar Usage panel, Total Scotland, lunch occasions

Though lunchboxes decreased in 2020, there was an uplift in pre-planning with bulk cooking a more common behaviour.

Food for lunch prepared on another day lifted from 6.5% to 7.1% after lockdown was announced.

However this was not just at Lunch – there was also growing presence at evening meals (6.4% vs. 5.3%)

Kantar Usage panel , Total Scotland, 40 w/e 27 Dec 20 vs. year ago, food prepared on another day carried out lunch occasions vs. all meals in home & carried out

Top 2020 evening meal dishes:

Italian Food
(12% of eve meal)

Chicken Portions
(10% of eve meal)

Pizza
(7% of eve meal)

Pies/Pasties/Sav Puds
(6% of eve meal)

Oriental Food
(5% of eve meal)

Roast Dinners
(4% of eve meals)

Indian Food
(4% of eve meal)

Sausages
(4% of eve meal)

Soup
(4% of eve meal)

Mexican Food
(3% of eve meal)

Kantar Usage panel, Total Scotland, 52 w/e 27 Dec 20, share of total food at eve meal occasions

Scotland

Change in top evening meal dishes between 2019 and 2020

Italian Food (12%)
+0.8ppt share of 2020 Eve Meals vs. 2019

Chicken Portions (10%)
-0.5ppt share of 2020 Eve Meals vs. 2019

Pizza (7%)
+0.1ppt share of 2020 Eve Meals vs. 2019

Pies/Pasties (6%)
+0.1ppt share of 2020 Eve Meals vs. 2019

Oriental Food (5%)
+0.3ppt share of 2020 Eve Meals vs. 2019

Roast Dinners (4%)
-0.3ppt share of 2020 Eve Meals vs. 2019

Indian Food (4%)
-0.1ppt share of 2020 Eve Meals vs. 2019

Sausages (4%)
0.0ppt share of 2020 Eve Meals vs. 2019

Soup (4%)
-0.5ppt share of 2020 Eve Meals vs. 2019

Mexican Food (3%)
-0.4ppt share of 2020 Eve Meals vs. 2019

Kantar Usage panel, Total Scotland, 52 w/e 27 Dec 20 vs. YA, share of total food at eve meal occasions

Treatier meal centres also increased their share of evening meals in 2020 vs. 2019.

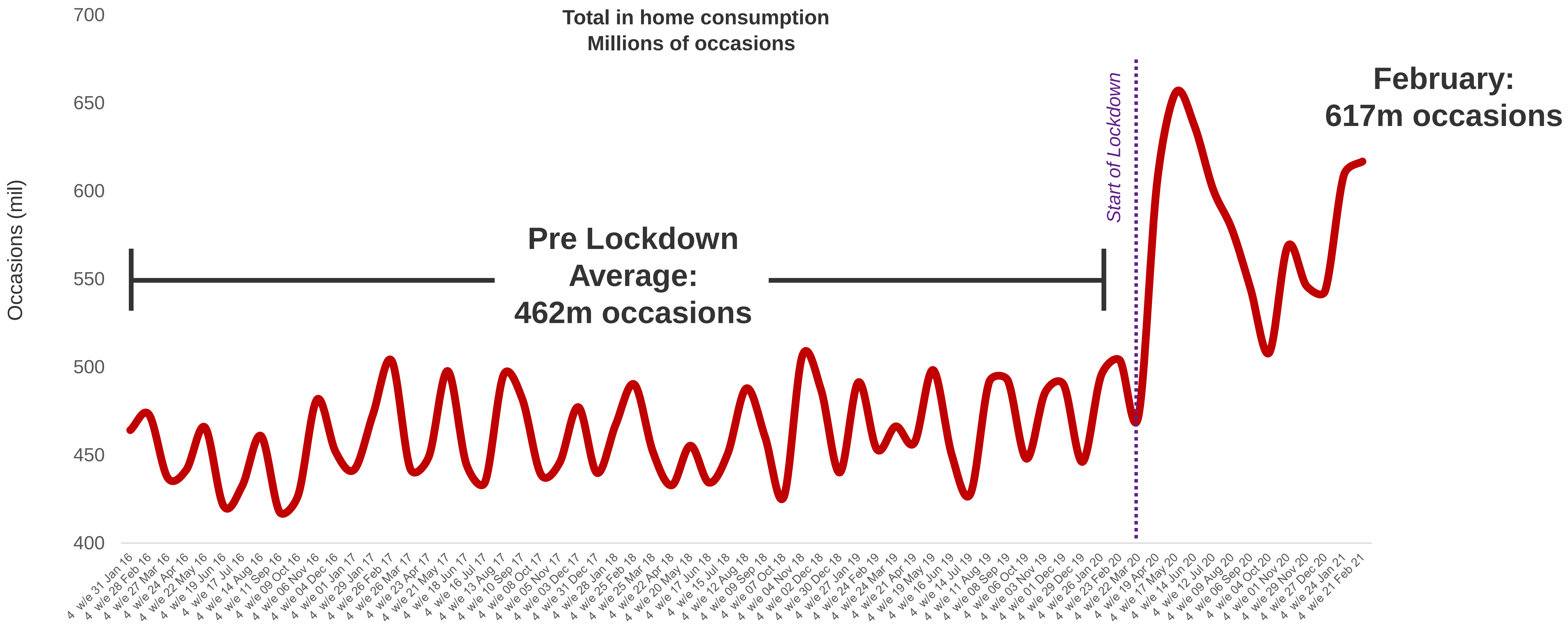
Burgers	Steak
+30%	**+19%**
extra evening occasions vs. 2019	extra evening occasions vs. 2019
2.0% of evening meal (30m)	1.3% of evening meal (20m)

KANTAR

Kantar Usage panel Total Scotland, 52 w/e 27 Dec 20 ,share of total food at evening meal occasions vs. 52w/e 22nd Mar '20

Early 2021 insights

At the start on 2021, in-home occasions increased again under the conditions of the post Christmas lockdown, reaching 617 million occasions by February 2021.



We had a not so dry January: 2021 saw the highest number of in home alcoholic drink occasions of any January in the last five years.

(24 million occasions)

Overall summary

Overall summary

- Eating at home increased after Scotland went into lockdown in Spring 2020, reaching a peak of 656 million occasions by May 2020. Although this declined, occasions remained higher than at the start of 2020 and higher than pre-Covid levels.
- The main drivers of consumption after the national lockdown was announced were taste and functional needs. “Treating” also emerged as more important over this time, superseding convenience.
- 71% of in home occasions in 2020 were driven by taste, compared to 16% being driven by potential benefits to health.
- There were an additional 437 million snack occasions at home after the national lockdown in 2020, compared with the previous year. Families reported the biggest increase in snacking at home in the first 12 weeks of lockdown, with an increase of 73% compared to the previous year.
- Drinks accounted for the greatest share of snack occasions in 2020. Fruit was chosen on 13% of in-home snack occasions and chocolate confectionery on 6.3%.
- Consumption of alcoholic drinks increased in the initial period following the national lockdown in 2020, peaking at 34 million occasions in May 2020. Families increased their consumption of alcoholic drinks at home by 69% in the first 12 weeks after the national lockdown was announced, however consumption by the end of the year was 17% lower than the same point in 2019.
- Cooking effort impacts both on time spent and cost per person. Assembled meals in 2020 took the least amount of time and were the cheapest (17 mins and £1.31 per person). Cooking from scratch took the longest per occasion (42 mins) and delivered takeaways was the most expensive (£8.14 per person).

This report complements and adds to existing FSS data on monitoring trends in food consumption and dietary intake.