Food Standards Scotland

For safe food and healthy eating

Exploring the impact of COVID-19 on food and drink retail purchasing patterns in Scotland

Food Standards Scotland analysis of data from Kantar

Food Standards Scotland

About this report

- The data presented within this report were provided by Kantar for Food Standards Scotland (FSS).
- Analyses and reporting of data was carried out by FSS in collaboration with Kantar.
- The data presented relates to retail purchasing in Scotland, and refers to take home purchases. It does not include food and drink purchased for consumption outside the home (OOH).
- The data presented is purchase data only and this does not necessarily equate to consumption, as factors such as waste and cooking losses are not accounted for.
- The data does not provide motivations for purchase, such as stockpiling which was widely reported in the media in the run up to the national lockdown in March 2020.
- Weekly trends in purchase are presented between January 2019 and week ending 26th July 2020.
- Detail on Kantar's data collection and methodology can be found here:

https://www.foodstandards.gov.scot/publications-and-research/publications/monitoring-retail-purchase-and-price-promotions-in-scotland-2014-2018

Aims

This report presents the percentage difference in purchase between 2019 and 2020 of:

- Total retail food and drink, including by retailer type
- Household trips
- Calories and nutrients
- A selection of 17 individual food and drink categories

Categories of particular relevance to reported lockdown behaviours, for example food cupboard categories, were also included within this analysis.

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 and Spencers, Iceland, Waitrose	Aldi, Lidl, Bargain stores	Co-op, Independents and budgens	Chemists and drugstores, 'Others'

* Includes online shopping from supermarkets

Food and drink categories*

This report presents analyses of 17 individual food and drink categories:

Category	Definition
Fruit	All fresh, chilled, frozen and tinned fruit
Vegetables	All fresh, chilled, frozen and tinned vegetables, including salad leaves
Biscuits	All sweet and savoury biscuits
Confectionery	All ambient sugar and chocolate confectionery and chewing gum
Crisps and savoury snacks	All crisps, popcorn, savoury snacks and nuts
Soft drinks	All ambient and chilled soft drinks. Includes both regular and diet drinks.
Alcoholic drinks	All alcoholic drinks, including wine, spirits, beer and cider

Category	Definition
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, cous cous, 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
Meat	All fresh and frozen meat and meat products, including beef, pork, lamb, poultry and game
Fish	All fresh and frozen fish, smoked fish, shell fish and prepared fish

*Note: Category definitions used for the purposed of this analysis are not necessarily the same as those used for FSS' standard monitoring.

Glossary

Nutritional volume

Calculation of nutrients requires a measure of quantity. In most cases the nutritional volume is kilograms or litres. However for some categories where pack weights are not available, volume is expressed as number of servings or packs.

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 which are not required for our health.

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.

Out of Home (OOH)

Any food or drink purchased for consumption away from home, including food ‘on the go’ and deliveries and takeaways.

Context

- The impact of the COVID-19 pandemic has been unprecedented, with significant impacts on how we purchase and consume food. The following slide provides a brief timeline of the key COVID-19 events in Scotland to provide context.
- This report demonstrates differences in retail purchasing in the run up to the lockdown in March 2020 and beyond compared to the previous year.
- The data presented within this report does not include purchasing out of home (OOH) and it is important to note that a significant proportion of the OOH sector stopped operating due to the national lockdown between March and July 2020 and a considerable proportion of purchasing behaviour moved from out of home to in home (i.e. retail). Additionally, the advice to stay at home and the closure of schools and many workplaces will have contributed to changes in purchasing patterns.
- 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 during this time period.*

* Webinar: "How the pandemic has changed the out of home market" – Out of Home team, Kantar Worldpanel Division (Oct 2020)

Timeline of key COVID-19 events in Scotland - 2020

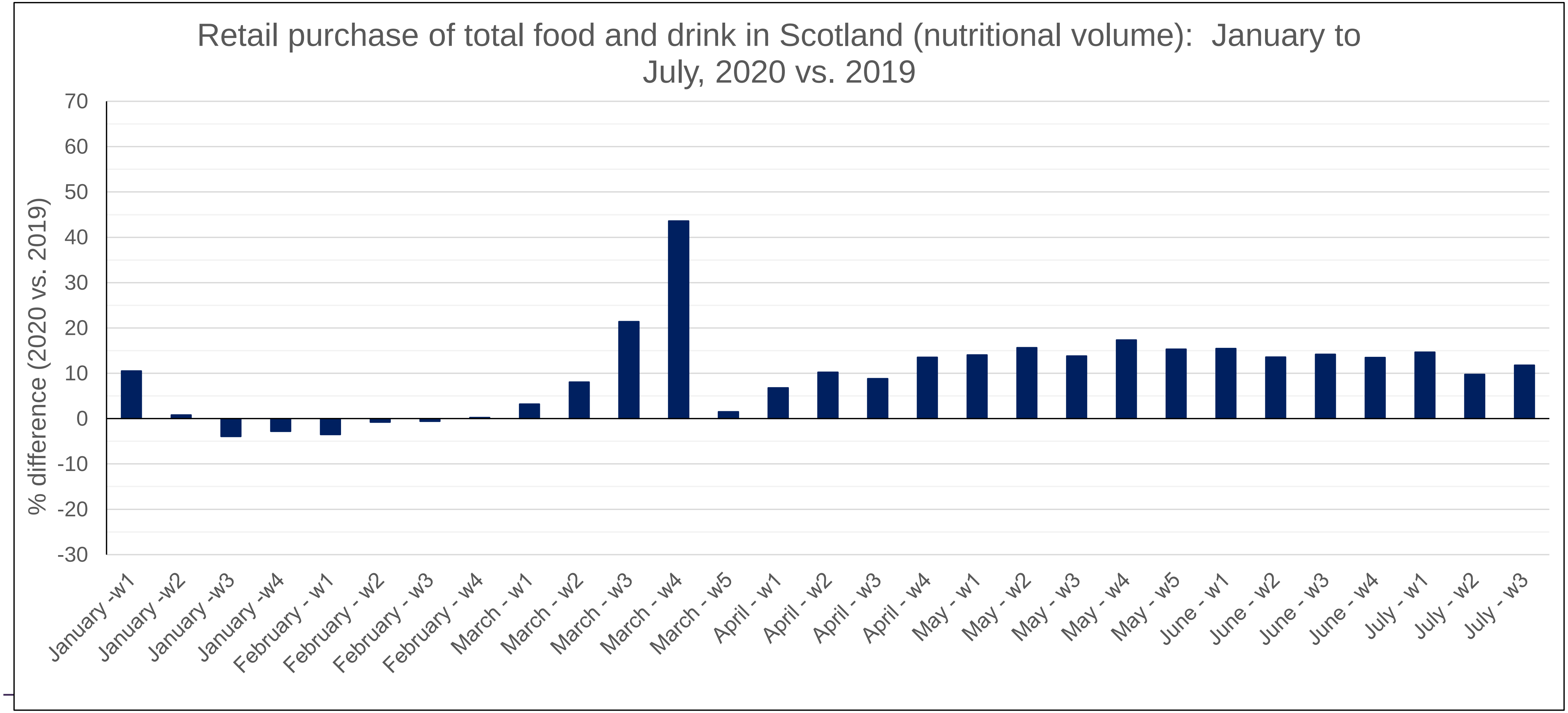
11 February 2020	WHO assign official name “COVID-19”
28 February 2020	First British death
1 March 2020	First case in Scotland
11 March 2020	WHO declares pandemic, first case of community transmission in Scotland and first death in Scotland
15-20 March 2020	Mass gatherings of more than 500 people cancelled, schools and hospitality sectors closed
24 March 2020	**NATIONAL LOCKDOWN BEGINS**
6 May 2020	National Records of Scotland records first weekly reduction in deaths
1 May 2020	Rules on going outdoors for exercise are relaxed
29 May 2020	Move to Phase 1* with updated rules on physical distancing
19 June 2020	Move to Phase 2*, face coverings mandatory on public transport
10 – 15 July 2020	Move to Phase 3*, OOH sector allowed to reopen

*Description of phases: covid-19-framework-decision-making-scotlands-route-map-through-out-crisis.pdf
Timeline of Coronavirus (COVID-19) in Scotland – SPICe Spotlight | Solas air SPICe (spice-spotlight.scot)

Total purchase of retail food and drink & Total number of trips per household

January – July 2020 compared to January - July 2019

The largest percentage difference for retail purchase of total food and drink can be found in the week before lockdown began, where purchase was 44% higher in 2020 compared to 2019. Although this dropped in the following weeks, purchase remained consistently higher compared to 2019.



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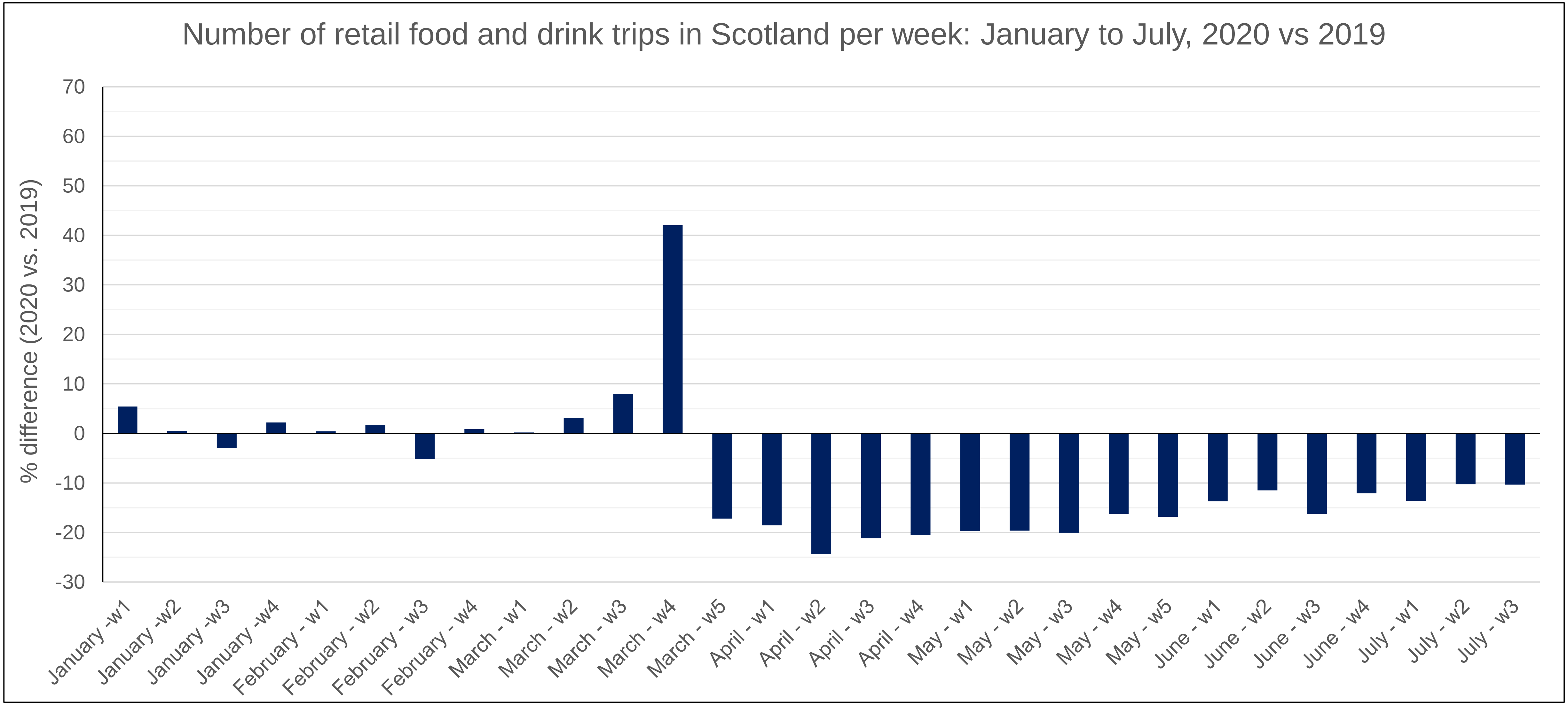
Retail trips were 42% higher the week before lockdown began, compared to the same week in 2019. However trips were consistently lower than 2019 levels in subsequent weeks.



Food Standards Scotland, 2021

Summary and conclusions

Volumes purchased

In the 4th week of March 2020 (the week just before lockdown officially began), the total volume of retail food and drink purchased in Scotland was 44% higher than the same week in March 2019.

Although this dropped in the following weeks purchase remained consistently above levels in 2019, ranging from 7% to 17% higher.

Number of trips

The average number of retail trips per household was 42% higher in the 4th week of March 2020 compared to the same week in 2019.

From April to July 2020, the number of retail trips remained consistently below levels in 2019, ranging from 10% to 24% lower.

Total purchase of food and drink by retailer type

January – July 2020 compared to January - July 2019

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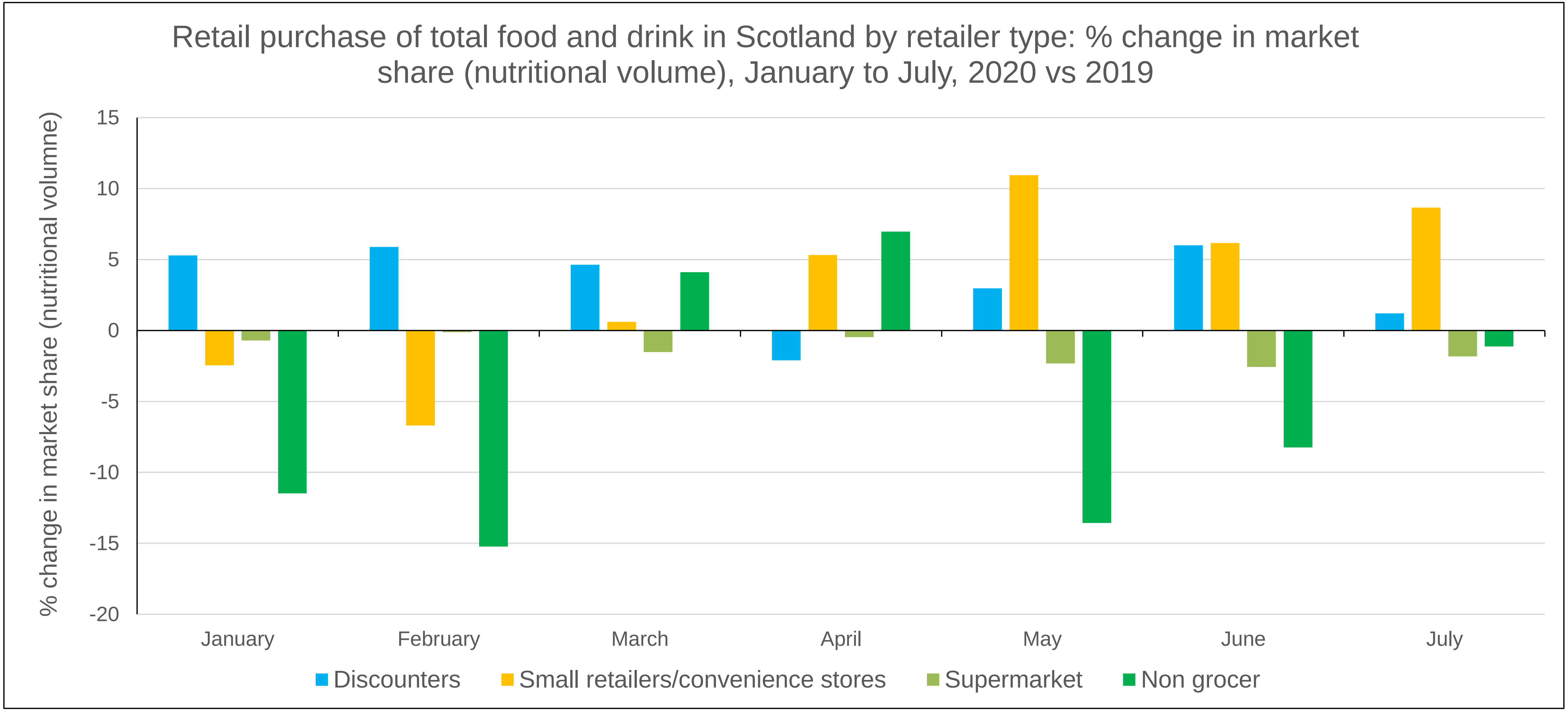
Compared to 2019, discounters and small retailers/convenience stores generally grew their share of total retail food and drink purchased in 2020.



Food Standards Scotland, 2021

Summary and conclusions: purchase of food and drink by retailer type

Compared to 2019, discounters and small retailers/convenience stores generally grew their share of total retail food and drink purchased in Scotland between March and July 2020. In contrast, supermarkets had a lower share of volume compared to 2019.

Non-grocers increased their share in March and April 2020 compared to 2019. However, in May and June 2020 their share was lower than the same months in 2019.

Purchase of calories and nutrients in Scotland

January – July 2020 compared to January - July 2019

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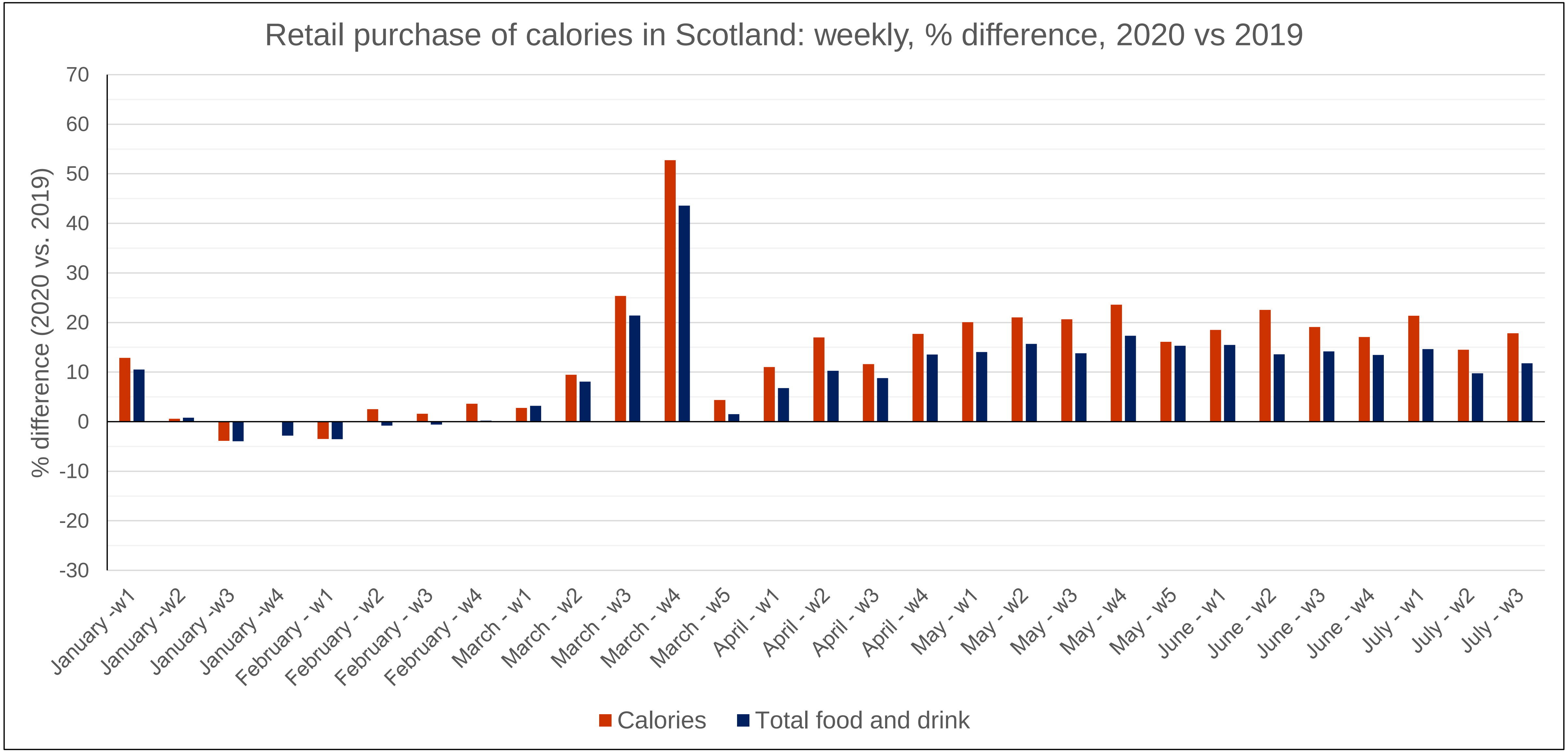
Calories and nutrients

Data is presented for:

- Total calories
- Total carbohydrate
- Total sugar
- Fibre
- Total fat
- Saturated fat
- Sodium (excluding sodium from table salt)
- Protein

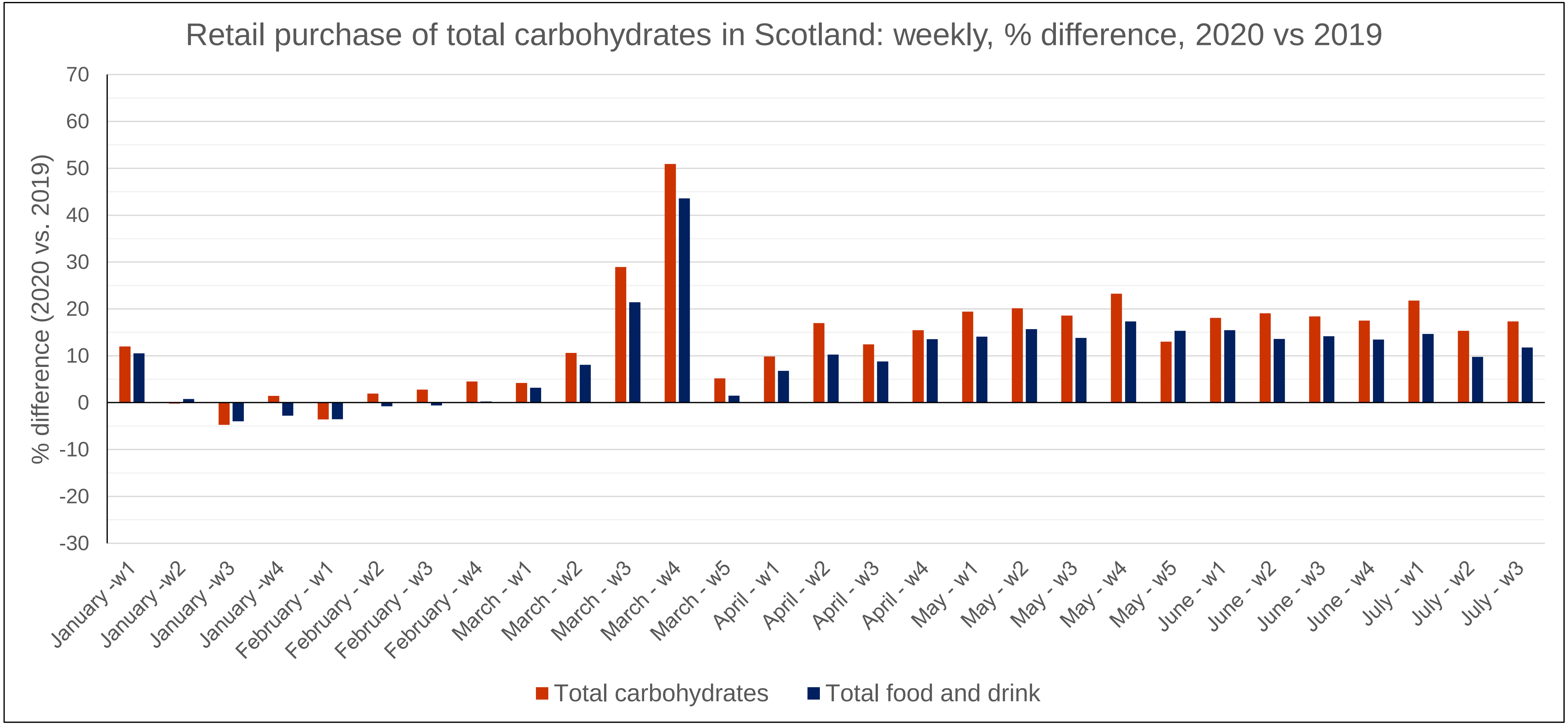
Data presented shows the percentage change in purchase of calories and nutrients in 2020 compared with 2019. Each graph also includes the percentage change in purchase (nutritional volume) of total food and drink for comparison.

Purchase of calories was 53% higher during the 4th week of March 2020 compared to 2019, remaining consistently higher until the third week in July.



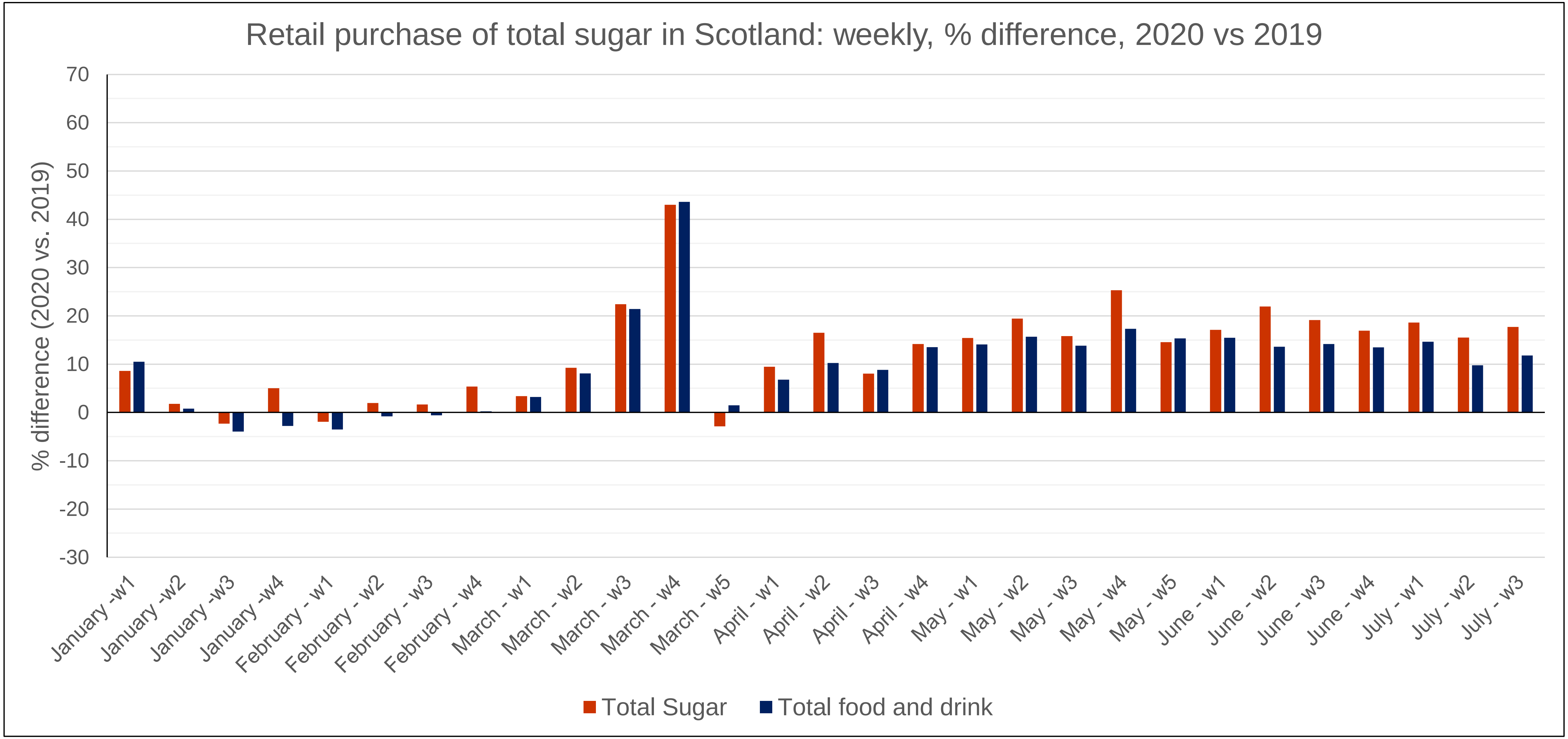
Food Standards Scotland, 2021

A similar pattern to calories was found for purchase of total carbohydrates, with an increase of 51% during the week before lockdown began, compared to the same week in 2019.



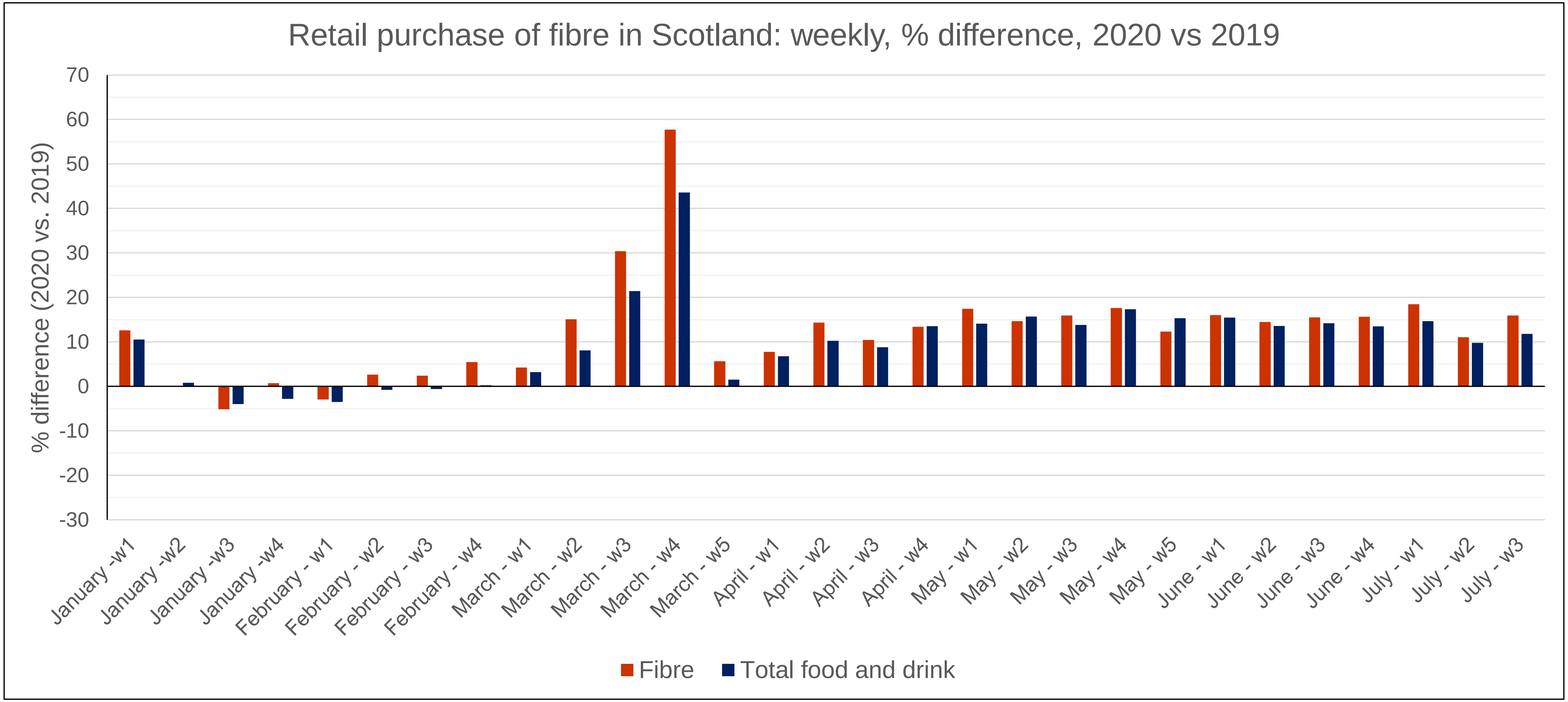
Food Standards Scotland, 2021

Purchase of total sugar was 43% higher in the week before lockdown compared to the same week in 2019, remaining consistently higher from April onwards.



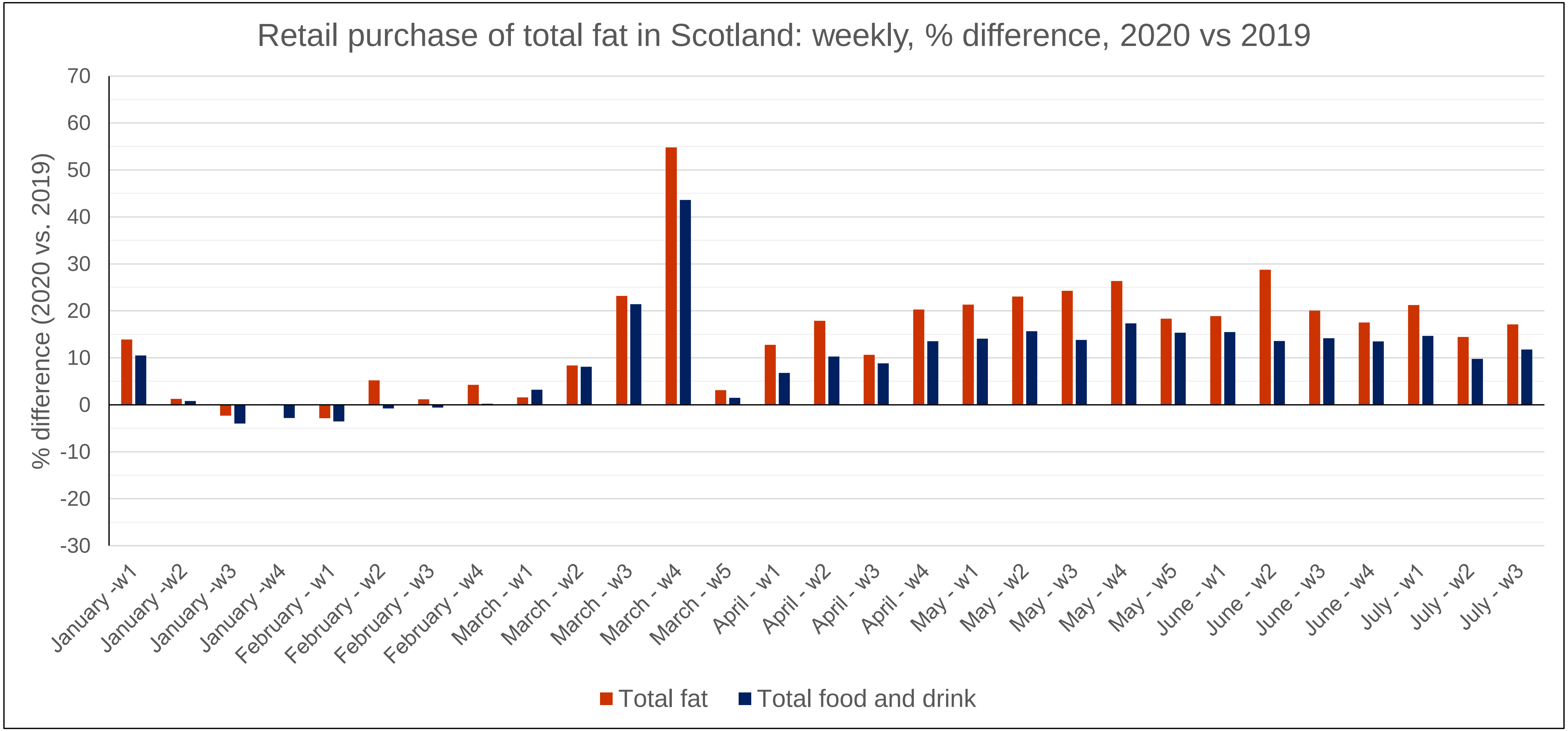
Food Standards Scotland, 2021

Purchase of fibre was 58% higher in the week before lockdown compared to the same week in 2019, remaining consistently higher over the following months.



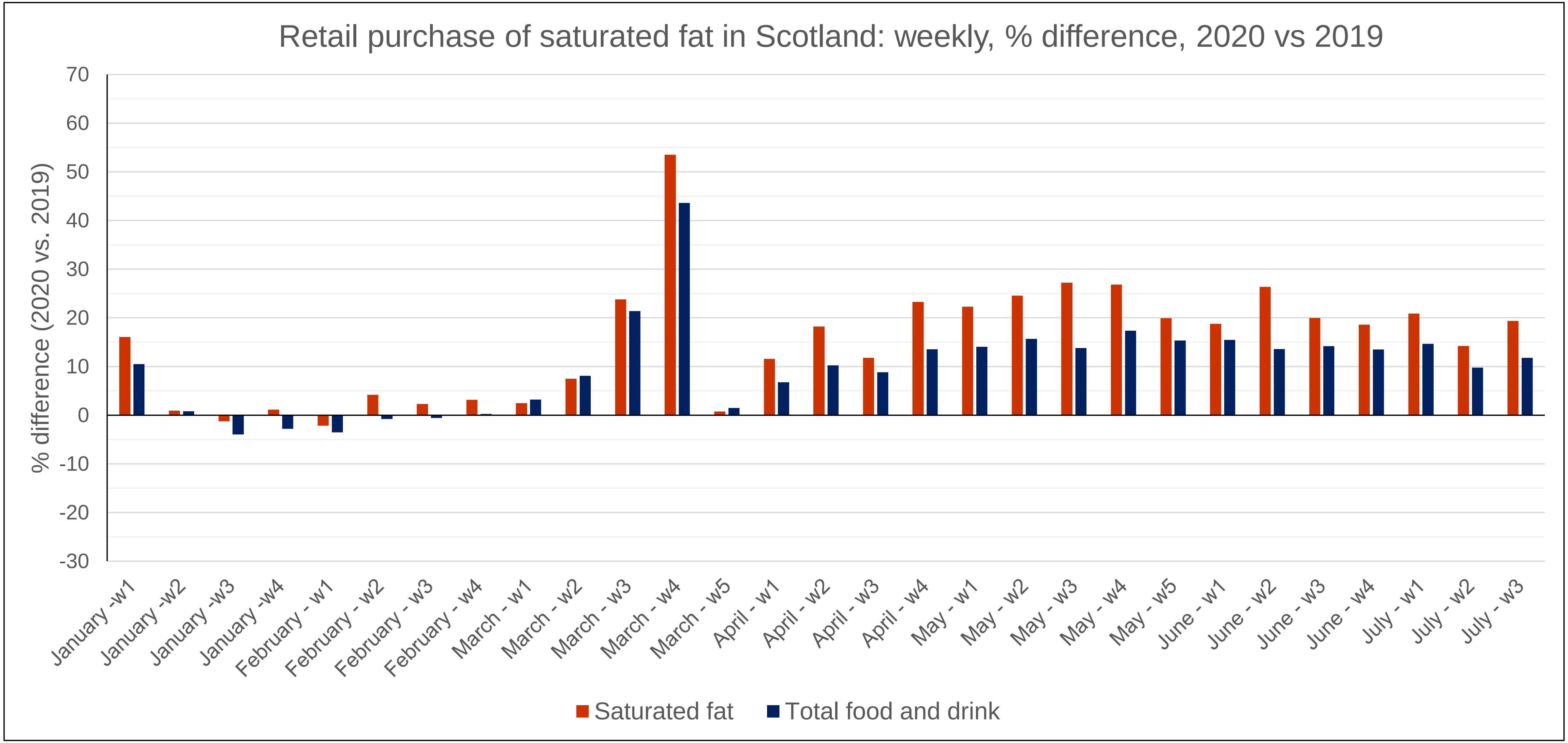
Food Standards Scotland, 2021

Purchase of total fat was 55% higher in the week before lockdown compared to the same week in 2019, remaining consistently higher over the following months.



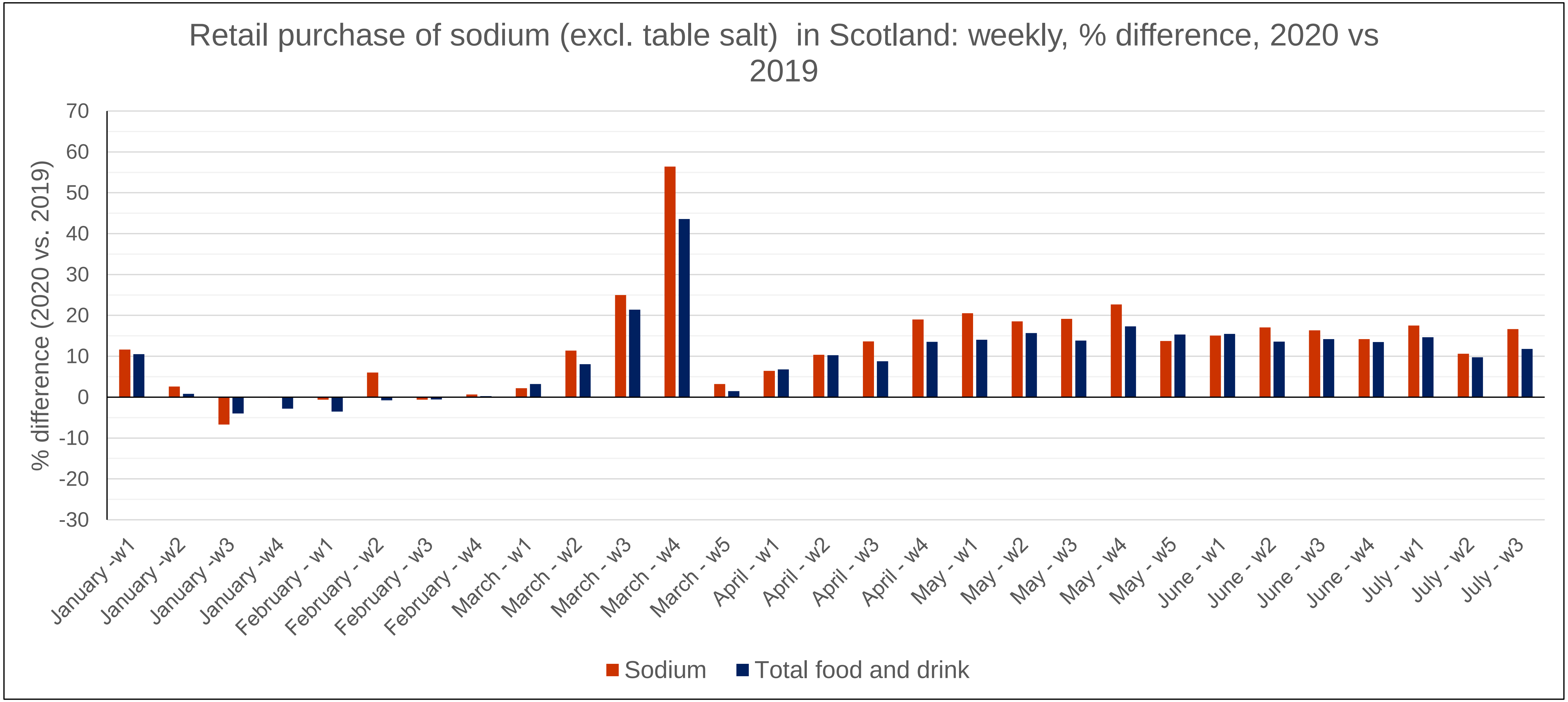
Food Standards Scotland, 2021

Similar to total fat, purchase of saturated fat was 53% higher in the week before lockdown compared to the same week in 2019, remaining consistently higher over the following months.



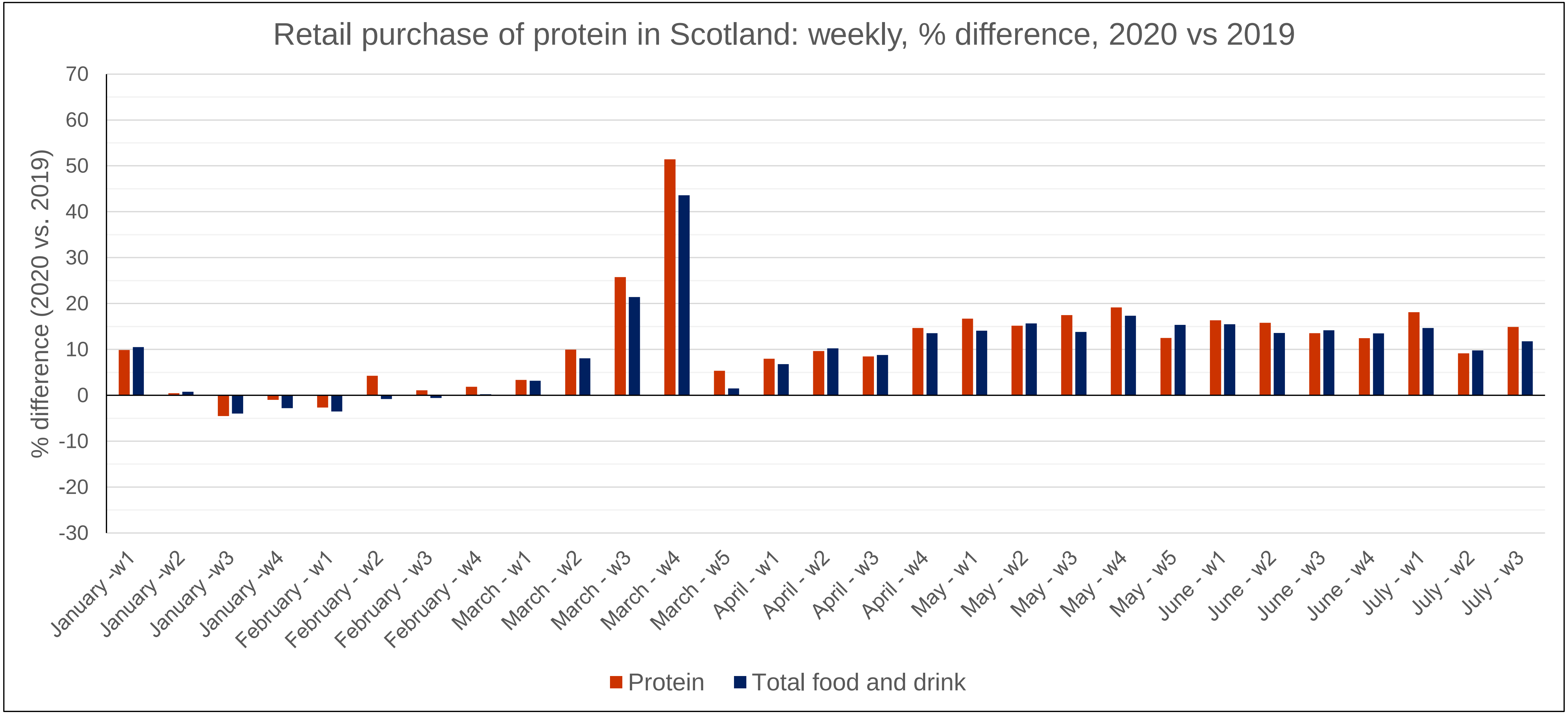
Food Standards Scotland, 2021

Purchase of sodium was 56% higher in the week before lockdown compared to the same week in 2019, remaining consistently higher over the following months.



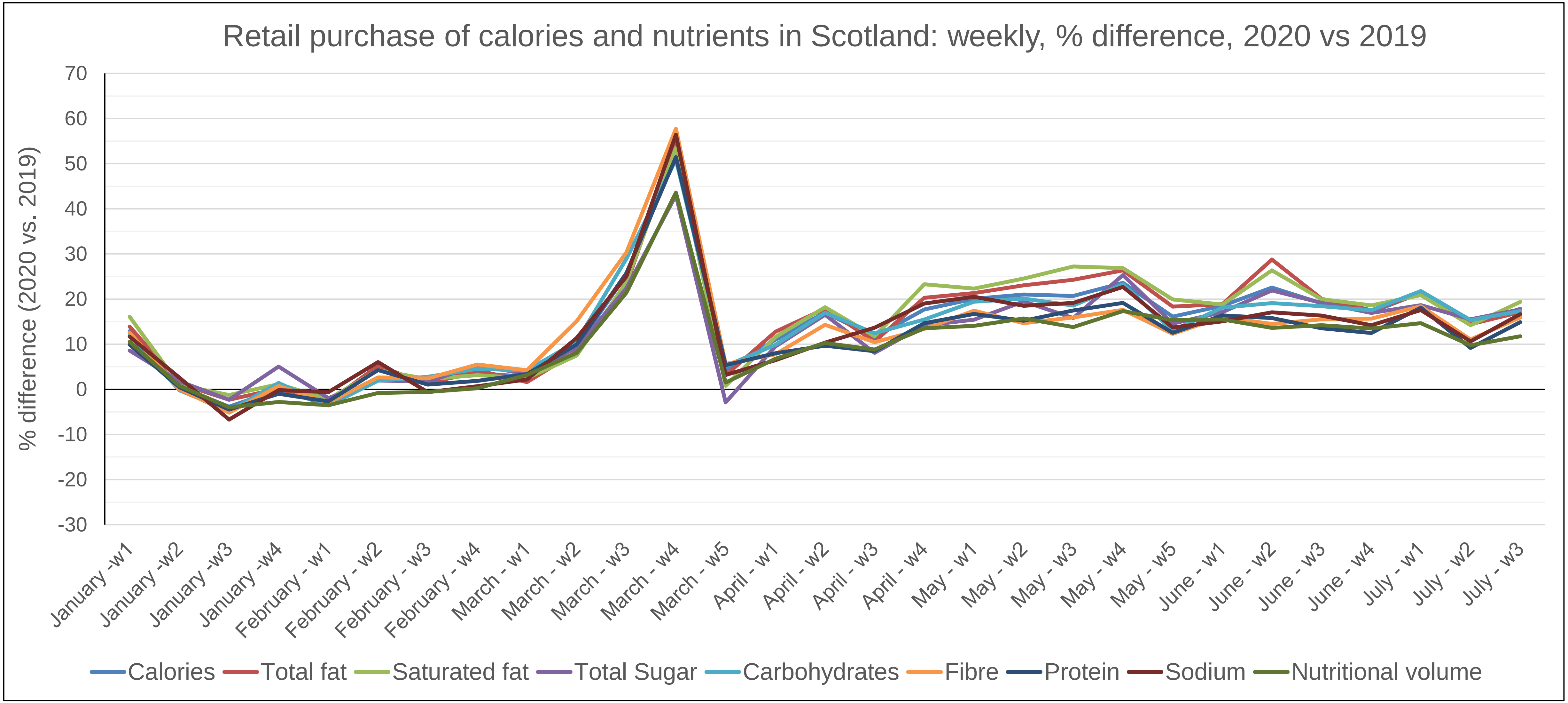
Food Standards Scotland, 2021

Purchase of protein was 51% higher in the week before lockdown began compared to the same week in 2019, remaining consistently higher over the following months.



Food Standards Scotland, 2021

The graph below demonstrates that the difference in purchase of all nutrients explored followed a similar pattern. Purchase in March 2020 was considerably greater than in 2019, and this was generally maintained between April and July.



Food Standards Scotland, 2021

Summary and conclusions: purchase of calories and nutrients

Purchase of calories, total carbohydrates, total sugar, fibre, total fat, saturated fat and sodium was considerably greater throughout March 2020 compared to March 2019. The week before lockdown began saw the greatest percentage increase in purchase across calories and nutrients. This ranged from 43% higher for total sugar, to 56% higher for sodium.

Purchase of calories and nutrients remained consistently higher than 2019 levels from April into July 2020.

From March to July 2020, there was generally a greater percentage increase in the purchase of calories, total fat, saturated fat, total sugar, carbohydrates and sodium compared to total food and drink purchase.

Purchase of individual food and drink categories in Scotland

January – July 2020 compared to January - July 2019

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Food and drink categories

The following section includes:

- Fruit and vegetables
- Discretionary foods, including biscuits, confectionery and crisps
- Food cupboard items, including canned goods, total soft drinks, ambient carbohydrates, bread, and sweet and savoury home cooking
- Meat and fish
- Alcoholic drinks

Data presented shows the percentage change in purchase of each food and drink category for 2020 compared with 2019. Each graph also includes the percentage change in purchase of total food and drink for comparison.

Purchase of fruit and vegetables in Scotland

January – July 2020 compared to January - July 2019

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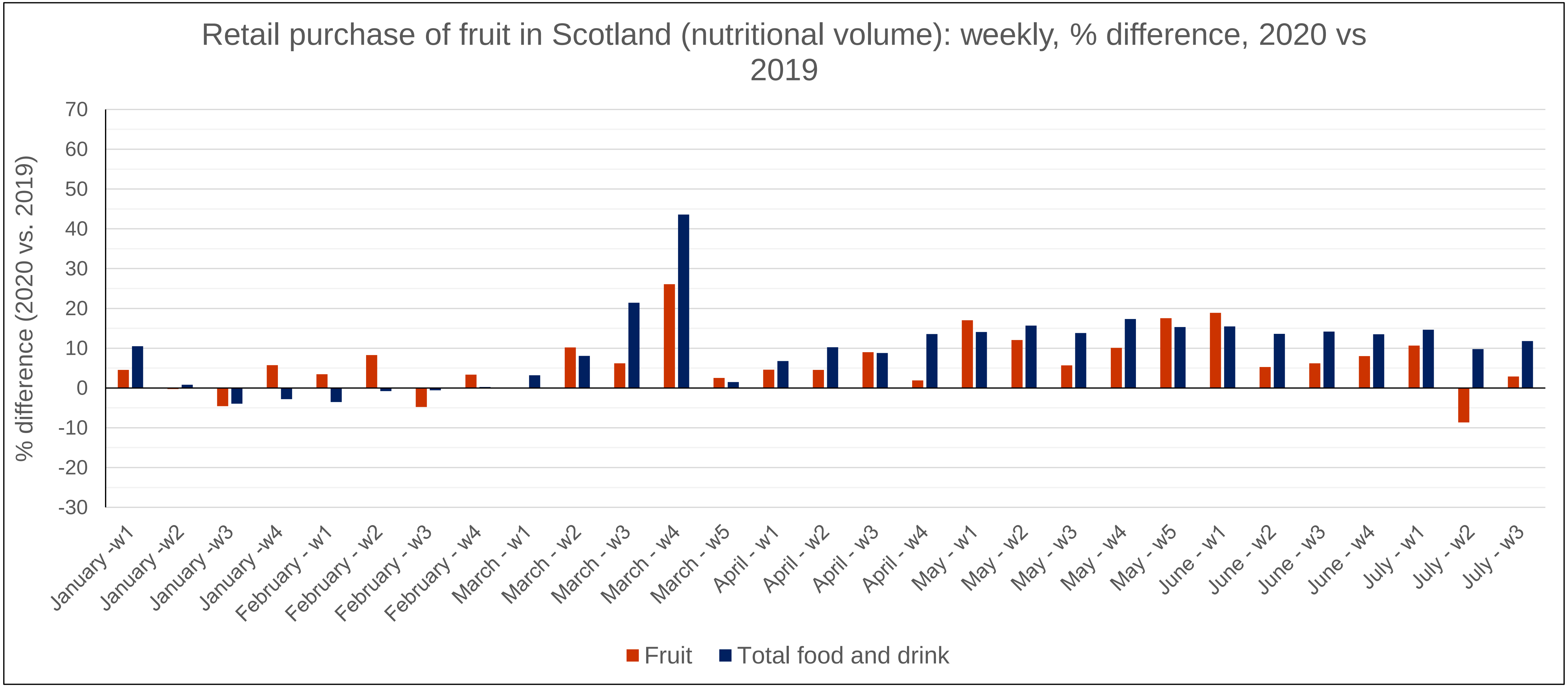
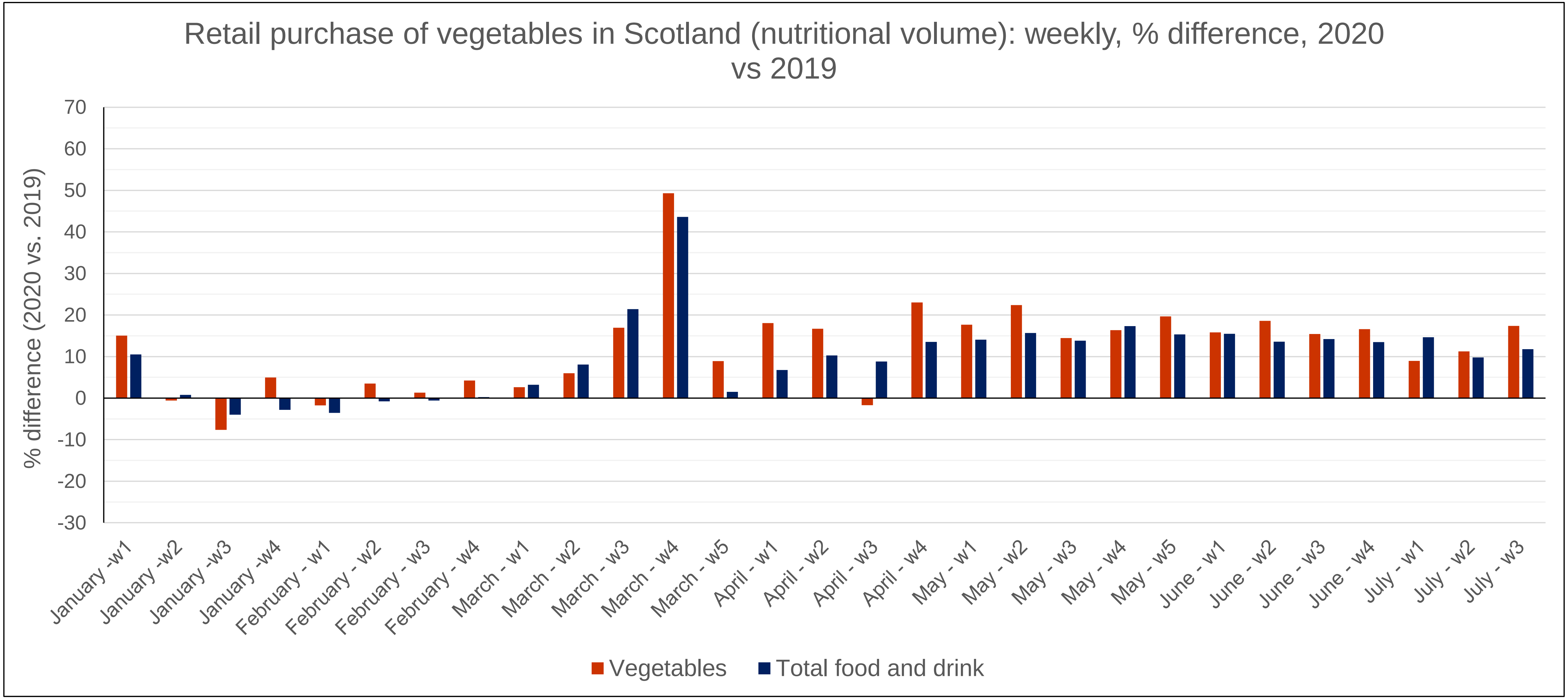
Purchase of fruit was generally higher in 2020 compared to 2019, particularly during the week before lockdown and between April and June. However, this tended to be lower than the percentage increase for total food and drink from April onwards.



Food Standards Scotland, 2021

Purchase of vegetables was generally higher in 2020 compared to 2019, peaking at 49% higher in the week before lockdown began. Purchase of vegetables also tended to be higher than the percentage increase for total food and drink.



Food Standards Scotland, 2021

Purchase of fruit and vegetables: summary and conclusions

Purchase of fruit was generally higher in 2020 compared to 2019, particularly during the week before lockdown where purchase was 26% higher, and between April and June.

Purchase of fruit from April to July 2020 generally remained above levels in 2019, ranging from 2% to 19% higher with the exception of the second week in July where it dropped to 9% below 2019 levels of purchase.

Purchase of vegetables was 49% higher in the 4th week in March 2020 compared with 2019. Purchase generally remained above levels in 2019 between April and July, ranging from 9% to 23% higher.

Percentage increases in purchase of fruit tended to be lower than the increase for total food and drink from April onwards, whereas purchase of vegetables tended to be higher.

Purchase of discretionary categories in Scotland

January – July 2020 compared to January - July 2019

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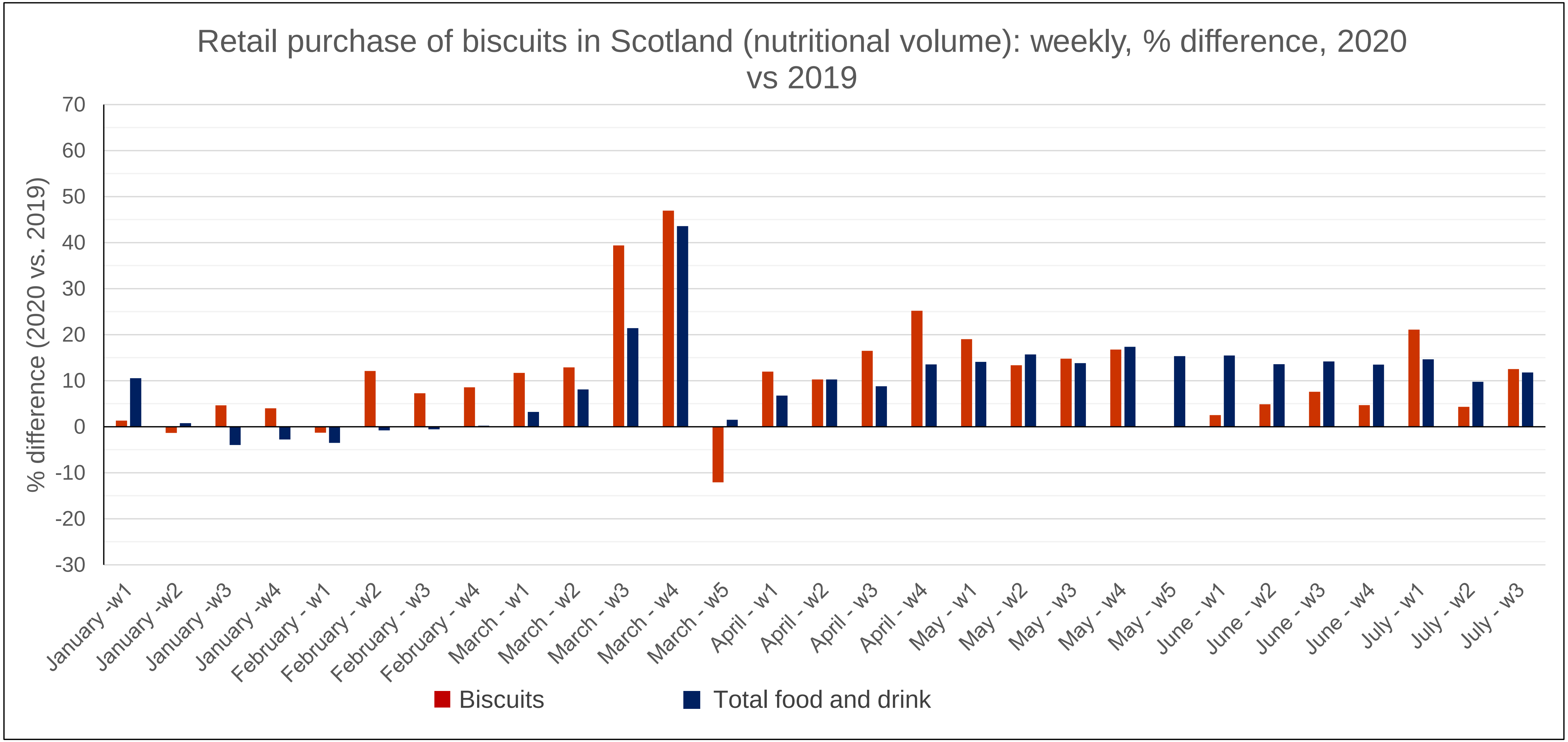
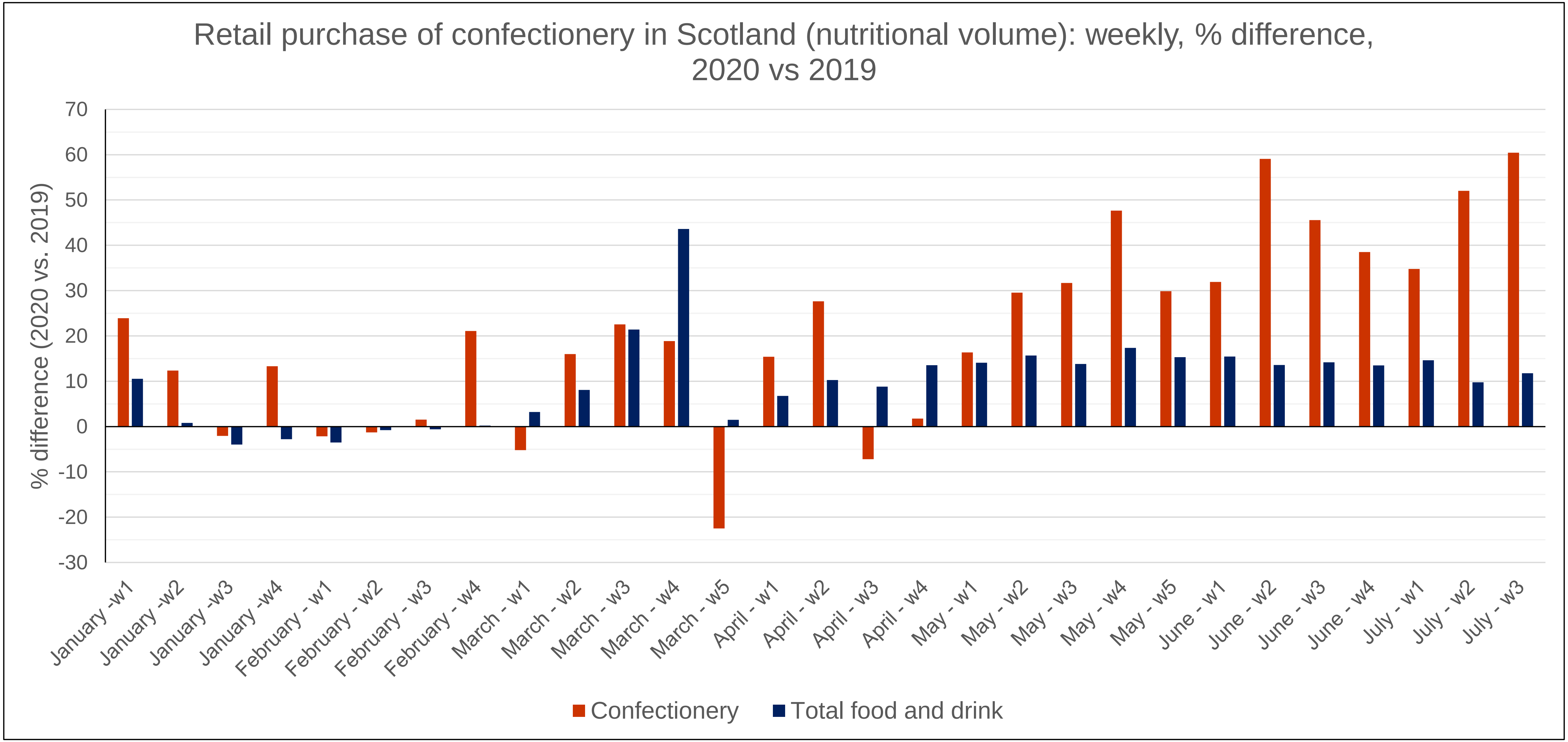
Purchase of biscuits was generally higher in 2020 compared to 2019. In the week immediately before lockdown (March week 4) it was 47% higher, however this dropped to 12% lower in March week 5.



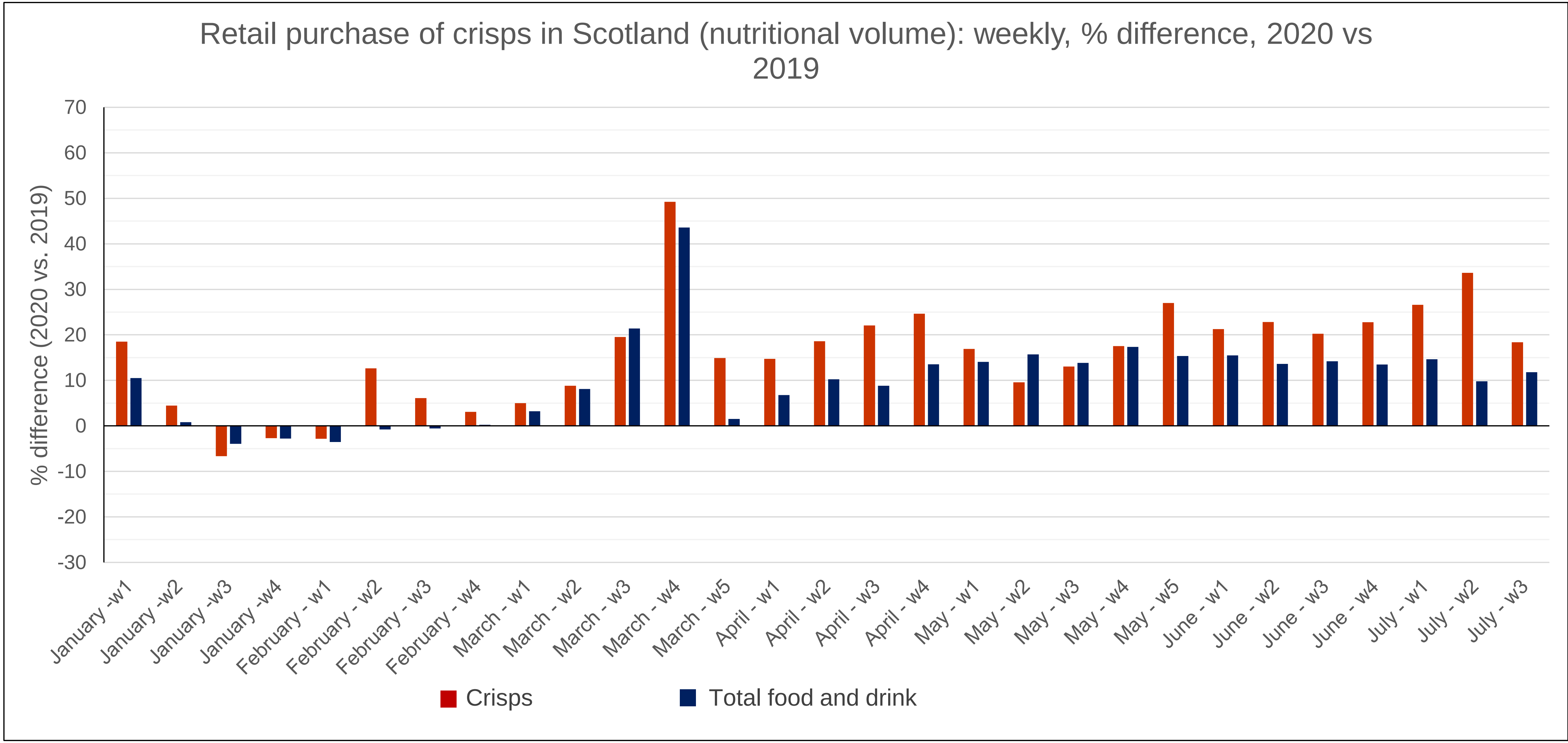
Food Standards Scotland, 2021

Purchase of confectionery was consistently higher from May 2020 compared to 2019, and substantially above the percentage increase in purchase of total food and drink. This was particularly prominent in week 3 of July 2020, where purchase was 60% higher compared to 2019.



Food Standards Scotland, 2021

Purchase of crisps was generally higher in 2020 compared to 2019, and this tended to be higher than the increase in purchase of total food and drink.



Food Standards Scotland, 2021

Purchase of discretionary categories: summary and conclusions

Purchase of biscuits was generally higher in 2020 compared to 2019. In the week immediately before lockdown (March week 4) it was 47% higher, however this dropped to 12% lower in March week 5.

Purchase of confectionery was consistently higher from May 2020 compared to 2019, and substantially above the percentage increase in purchase of total food and drink. This was particularly prominent in week 3 of July 2020, where purchase was 60% higher compared to 2019.

Purchase of crisps was generally higher in 2020 compared to 2019, particularly in week 4 of March where purchase was 49% higher. The increase in purchase of crisps tended to be higher than the increase in purchase of total food and drink.

Purchase of food cupboard items in Scotland

January – July 2020 compared to January - July 2019

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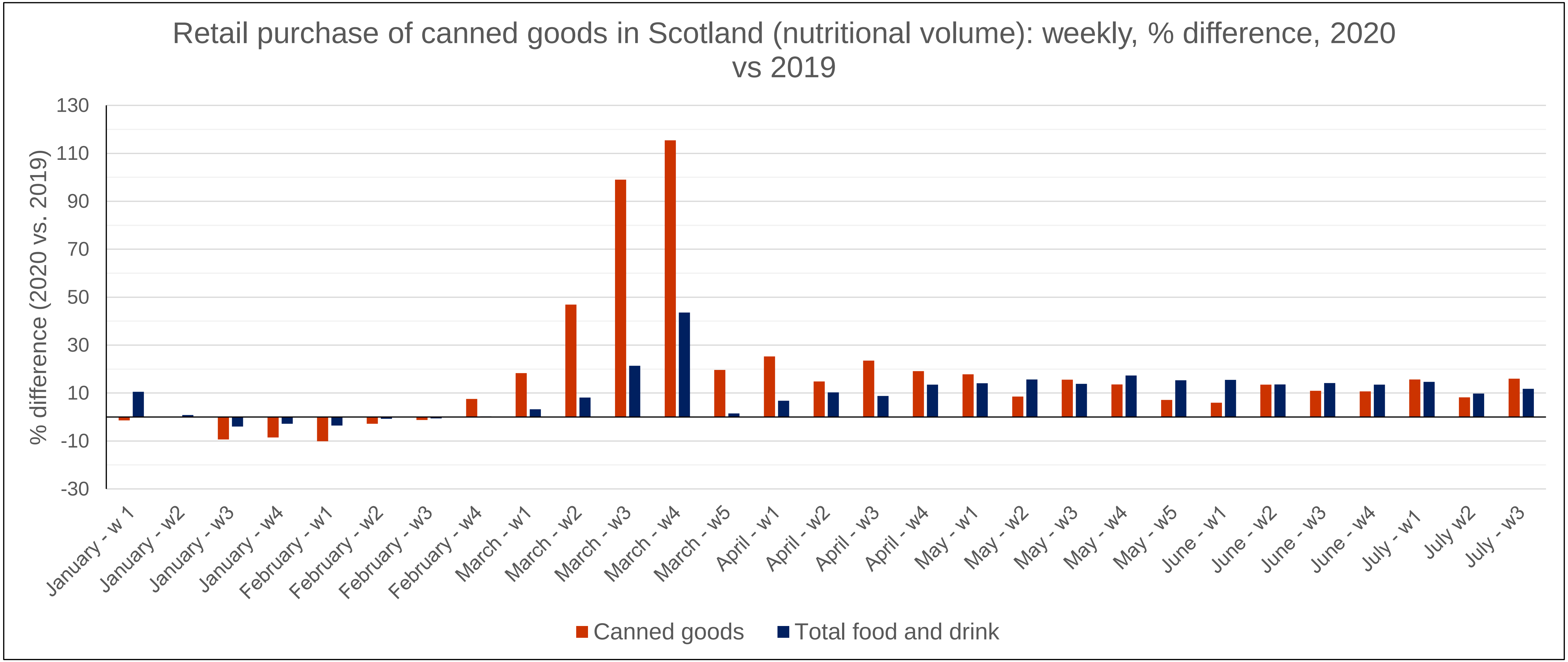
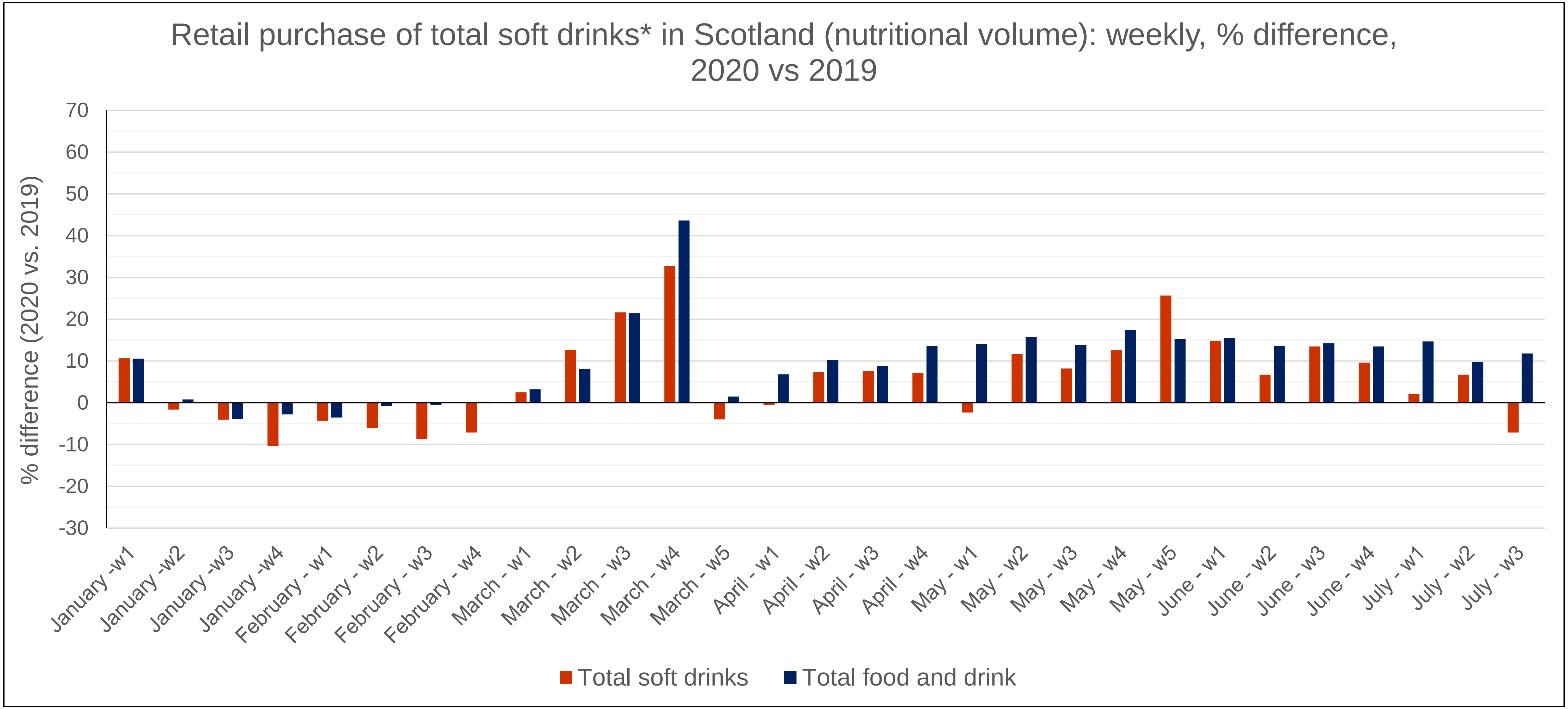
Purchase of canned goods was 115% higher the week before lockdown began compared to the same week in 2019. This was well above the percentage increase for total food and drink.



Food Standards Scotland, 2021

Purchase of total soft drinks* was 33% higher the week before lockdown compared to the same week in 2019. However, with the exception of week 5 of May, this was consistently lower than the percentage increase for total food and drink purchase, and in some weeks this was below 2019 levels.



*Includes both regular and diet drinks.

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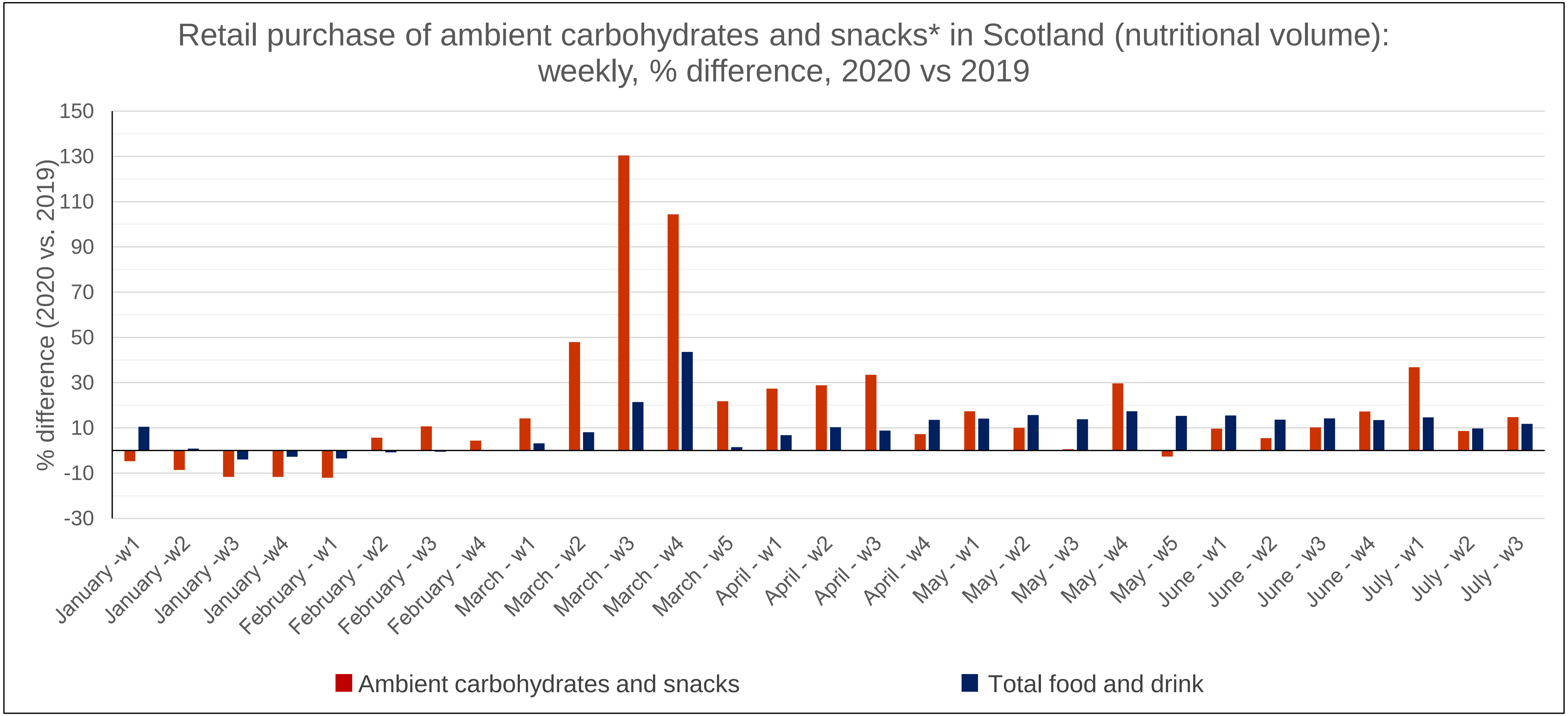
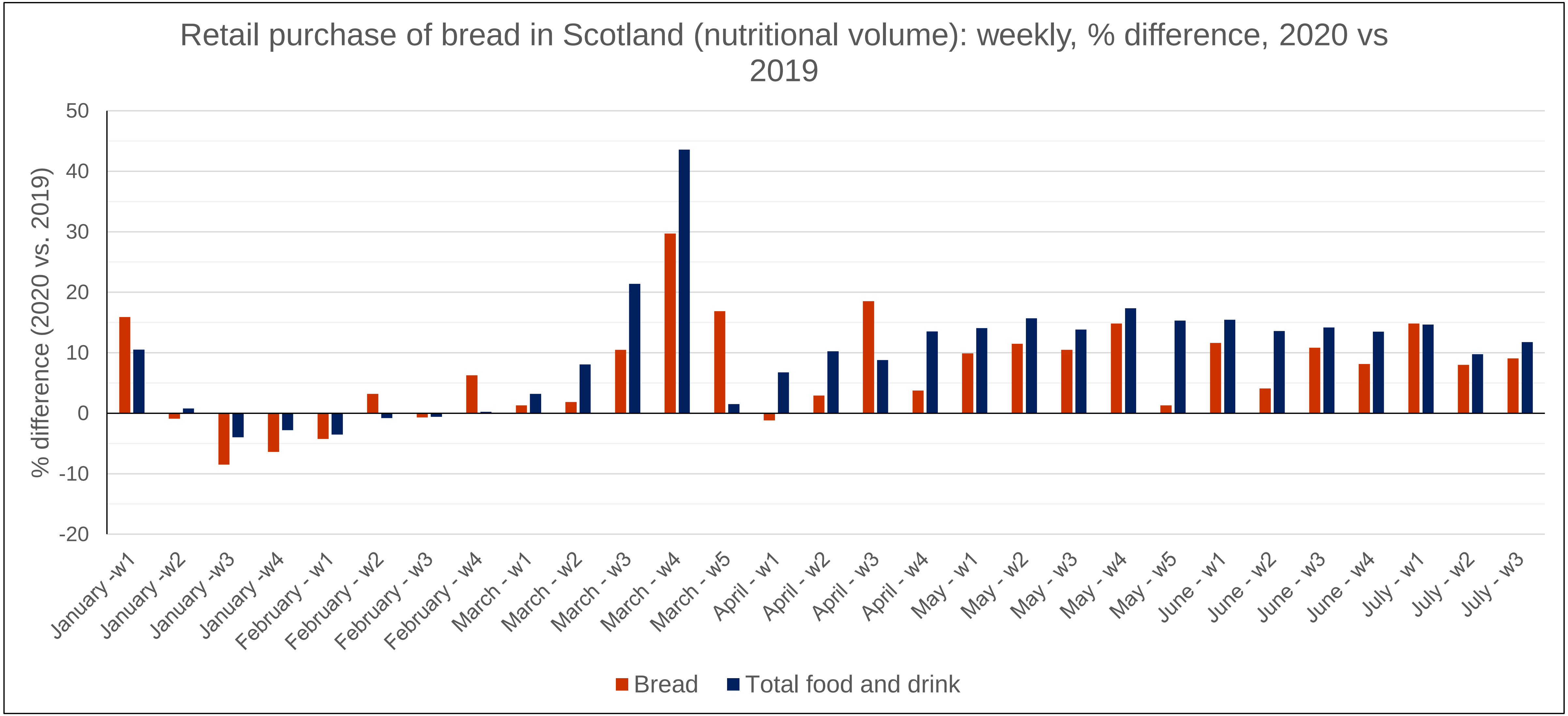
Compared to 2019, purchase of ambient carbohydrates and snacks* was generally higher from week 2 of February until the end July 2020. This peaked at 130% higher in March week 3. Purchase was frequently above the percentage increase in purchase of total food and drink.



* All rice (dry and pouches), noodles, dry pasta, pulses, packet soup, cous cous, instant hot snacks

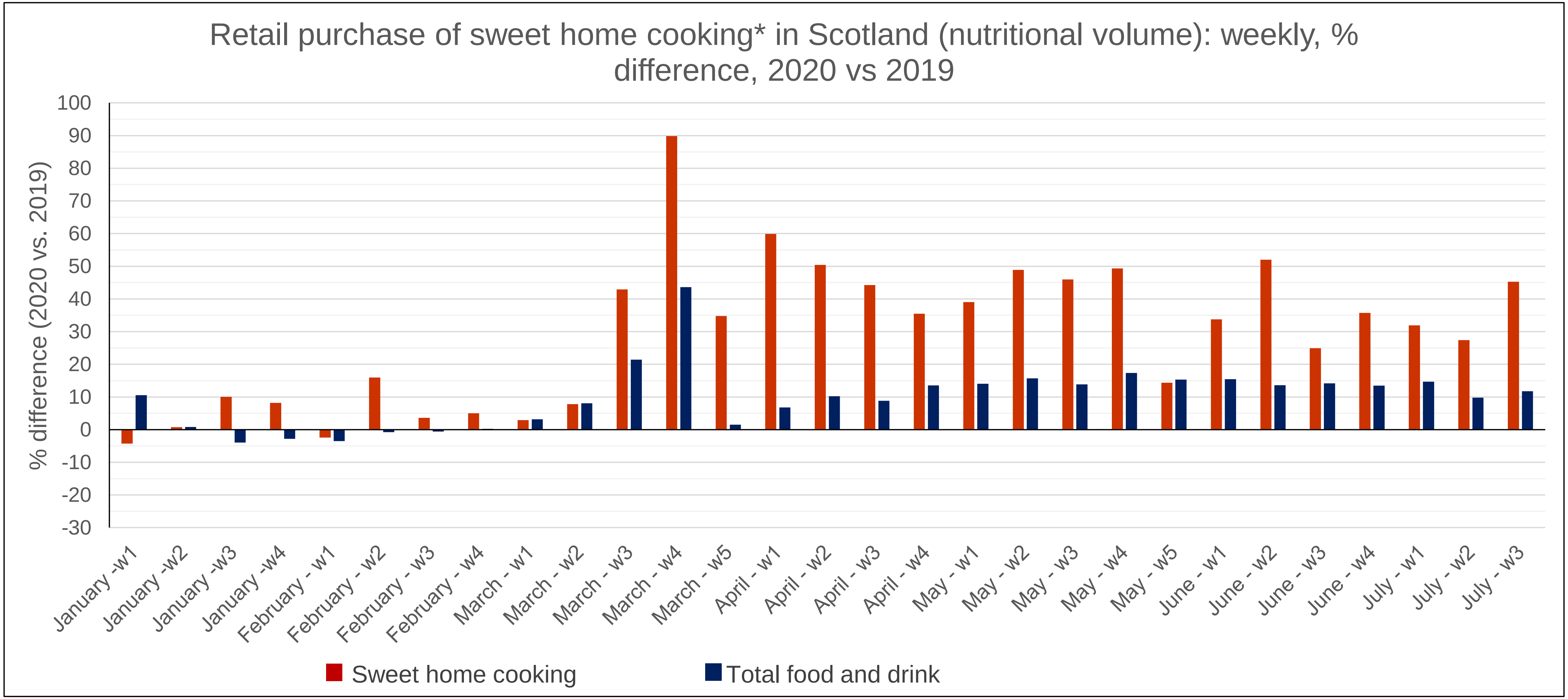
Food Standards Scotland, 2021

Purchase of bread from the end of February was almost always higher per week in 2020 compared to 2019, peaking at 30% higher during the week before lockdown began. However, this tended to be lower than the percentage increase for total food and drink.



Food Standards Scotland, 2021

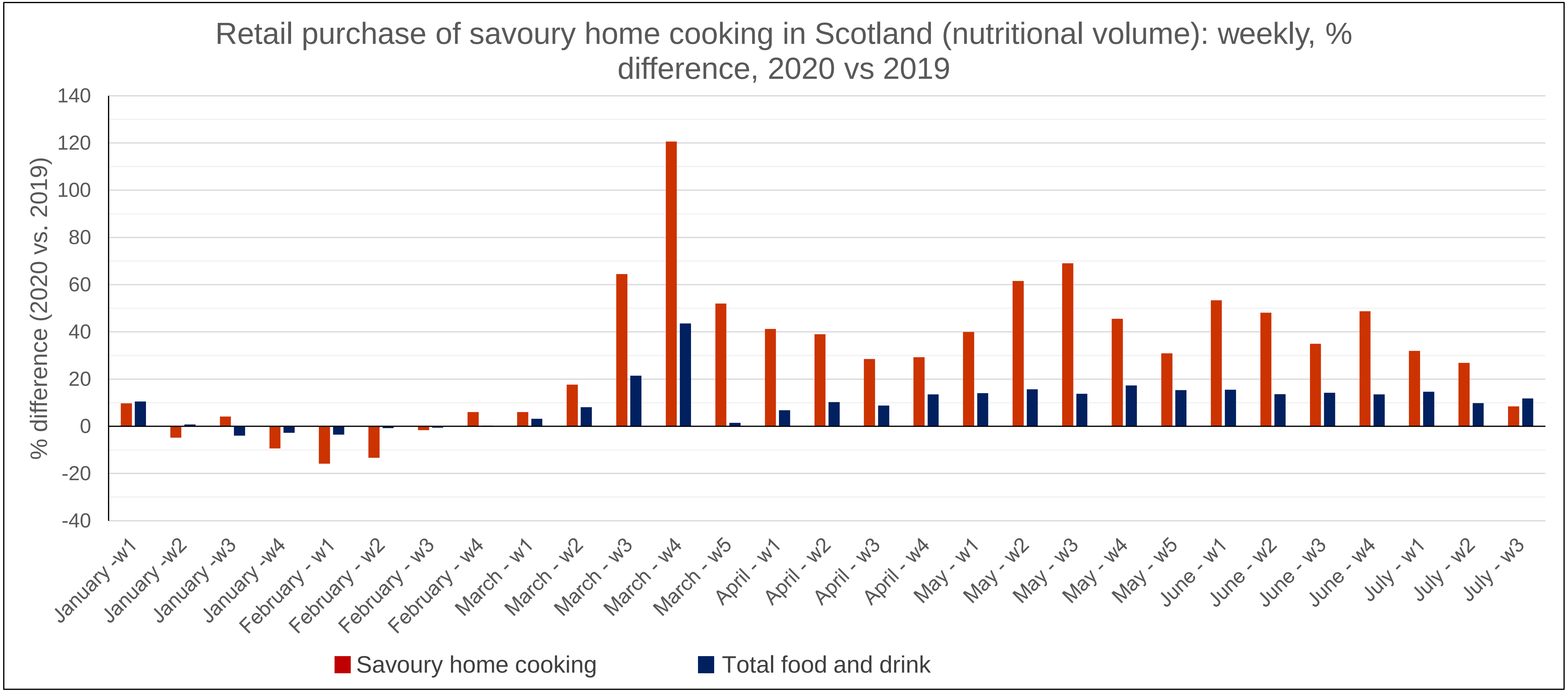
Purchase of sweet home cooking from mid February onwards was higher per week in 2020 compared to 2019, peaking at 90% higher by week 4 of March. This was considerably higher than the percentage increase in purchase of total food and drink with the exception of the last week in May.



* 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

Food Standards Scotland, 2021

Purchase of savoury home cooking between the end of February and July was higher per week in 2020 compared to 2019, peaking at 121% higher by week 4 of March. This was consistently higher than the percentage increase in purchase of total food and drink.



* Includes ambient cooking sauces, cooking oils, ethnic ingredients, flour, herbs, spices, meat extract, packet stuffing, suet, sweet and savoury mixes, vinegar and salt

Purchase of food cupboard items: summary and conclusions

The data showed similar patterns of purchasing for all the food cupboard products explored, with large peaks in purchase at the end of March 2020 compared to 2019. Purchase of these categories generally remained above 2019 levels from April to July 2020.

The highest % difference was observed in week 3 of March, with purchase of ambient carbohydrates and snacks around 130% higher in 2020 compared to the same week in 2019.

Purchase of canned goods, ambient carbohydrates, sweet home cooking and savoury home cooking were substantially higher during the week immediately before lockdown began compared to the same week in 2019 with increases of 115%, 104%, 90% and 121% respectively.

Purchase of meat and fish in Scotland

January – July 2020 compared to January - July 2019

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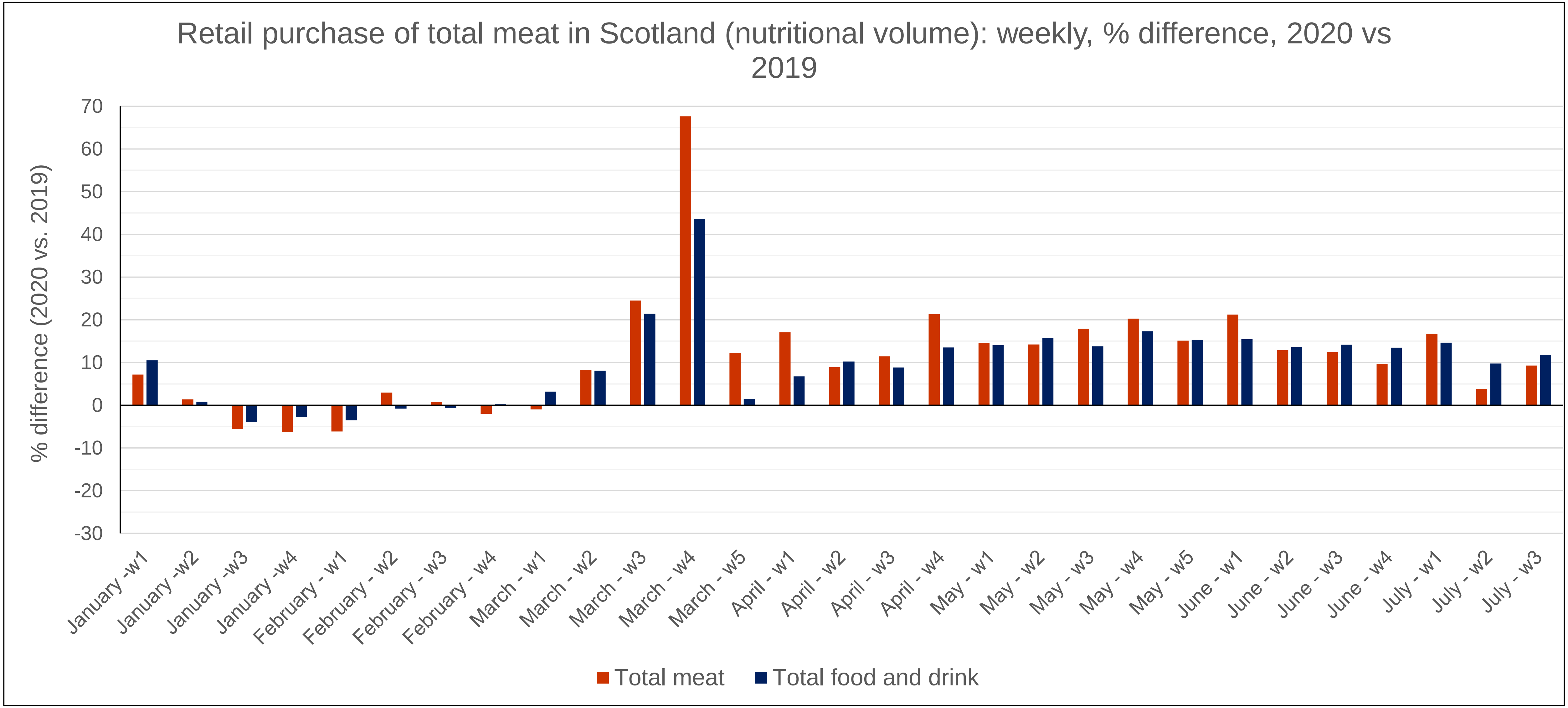
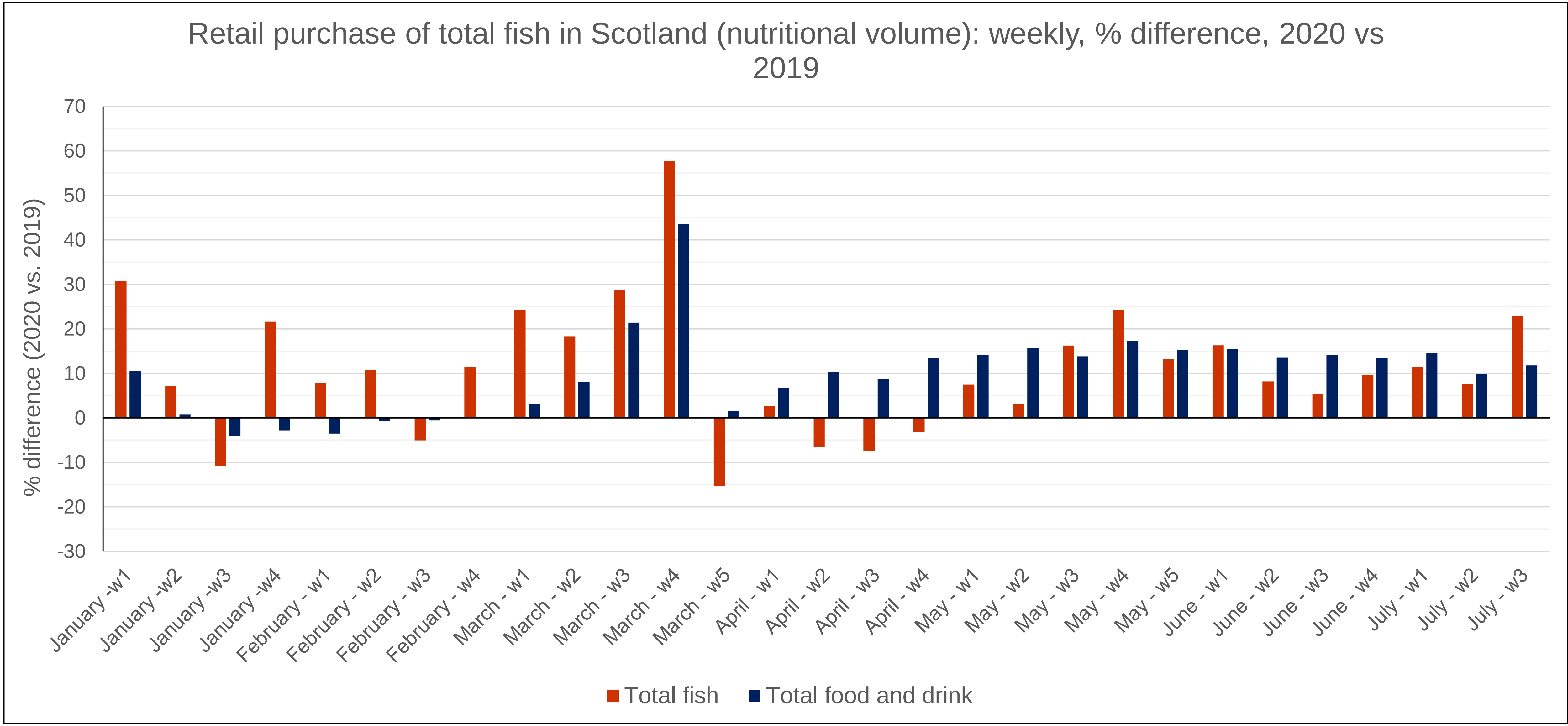
Compared to 2019 purchase of total meat was consistently higher from week 2 of March to July 2020, peaking at 68% higher in the week immediately before lockdown. This was substantially higher than the percentage increase in purchase of total food and drink.



Food Standards Scotland, 2021

In the early weeks of 2020, purchase of total fish was frequently higher than 2019. Purchase rose to be 58% higher compared to 2019 in the week before lockdown.



Food Standards Scotland, 2021

Purchase of meat and fish: summary and conclusions

Compared to 2019 purchase of total meat was consistently higher from week 2 of March to July 2020, peaking at 68% in the week immediately before lockdown. This was substantially higher than the percentage increase in purchase of total food and drink.

In the early weeks of 2020, purchase of total fish was frequently higher than 2019. Purchase rose to be 58% higher compared to 2019 in the week before lockdown.

Purchase of alcoholic drinks in Scotland

January – July 2020 compared to January - July 2019

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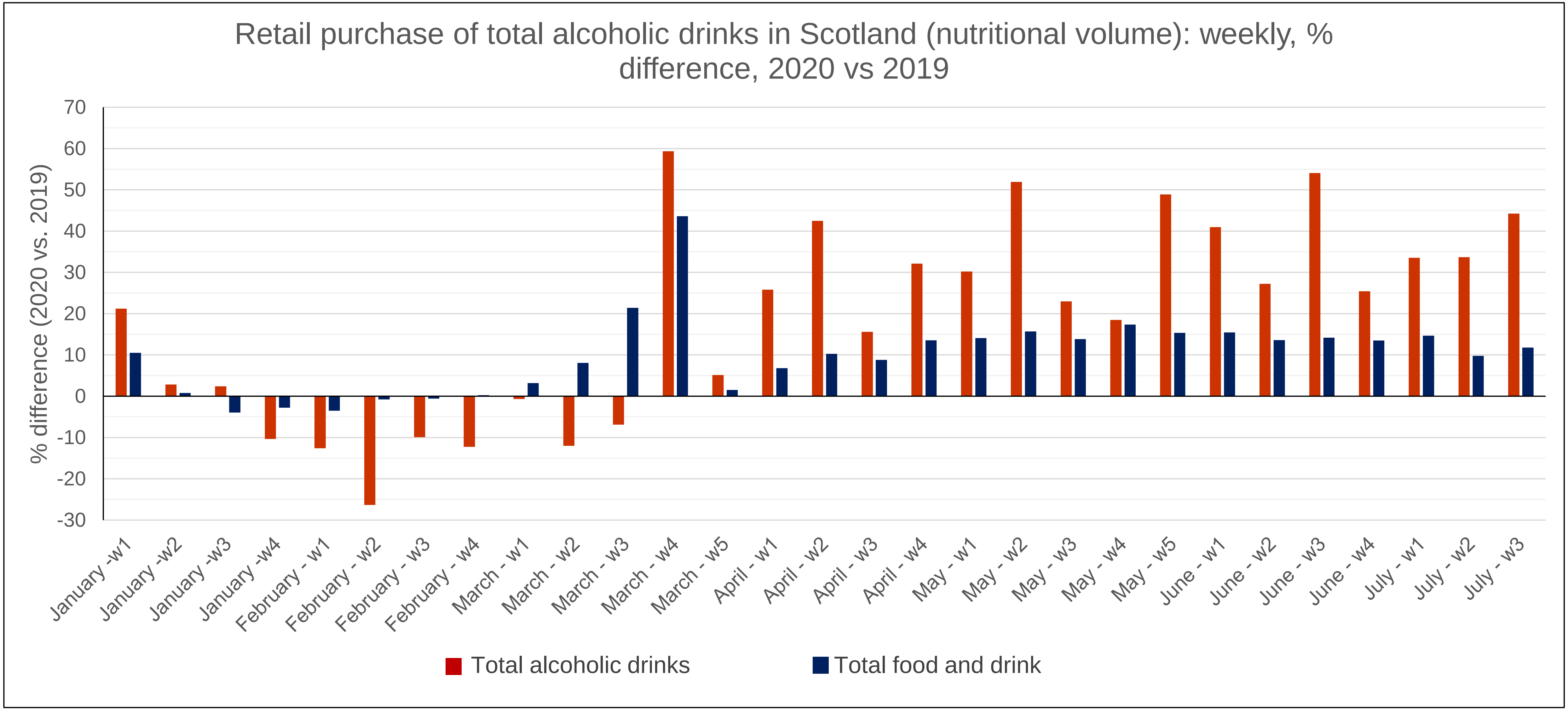
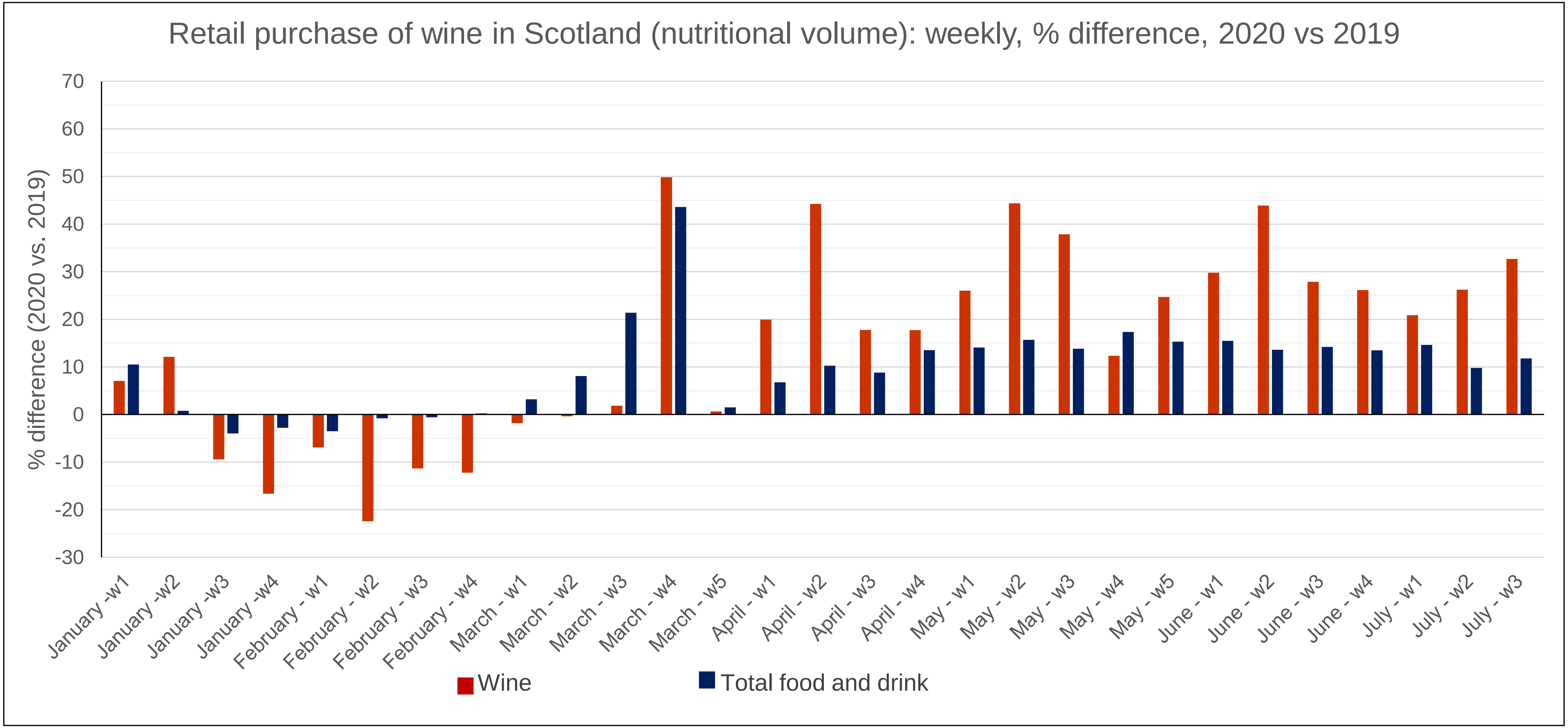
Purchase of total alcoholic drinks was predominantly lower pre-lockdown compared to the same weeks in 2019. Afterwards it remained consistently higher, peaking at 59% during week 4 of March, and above the percentage increase for total food and drink.



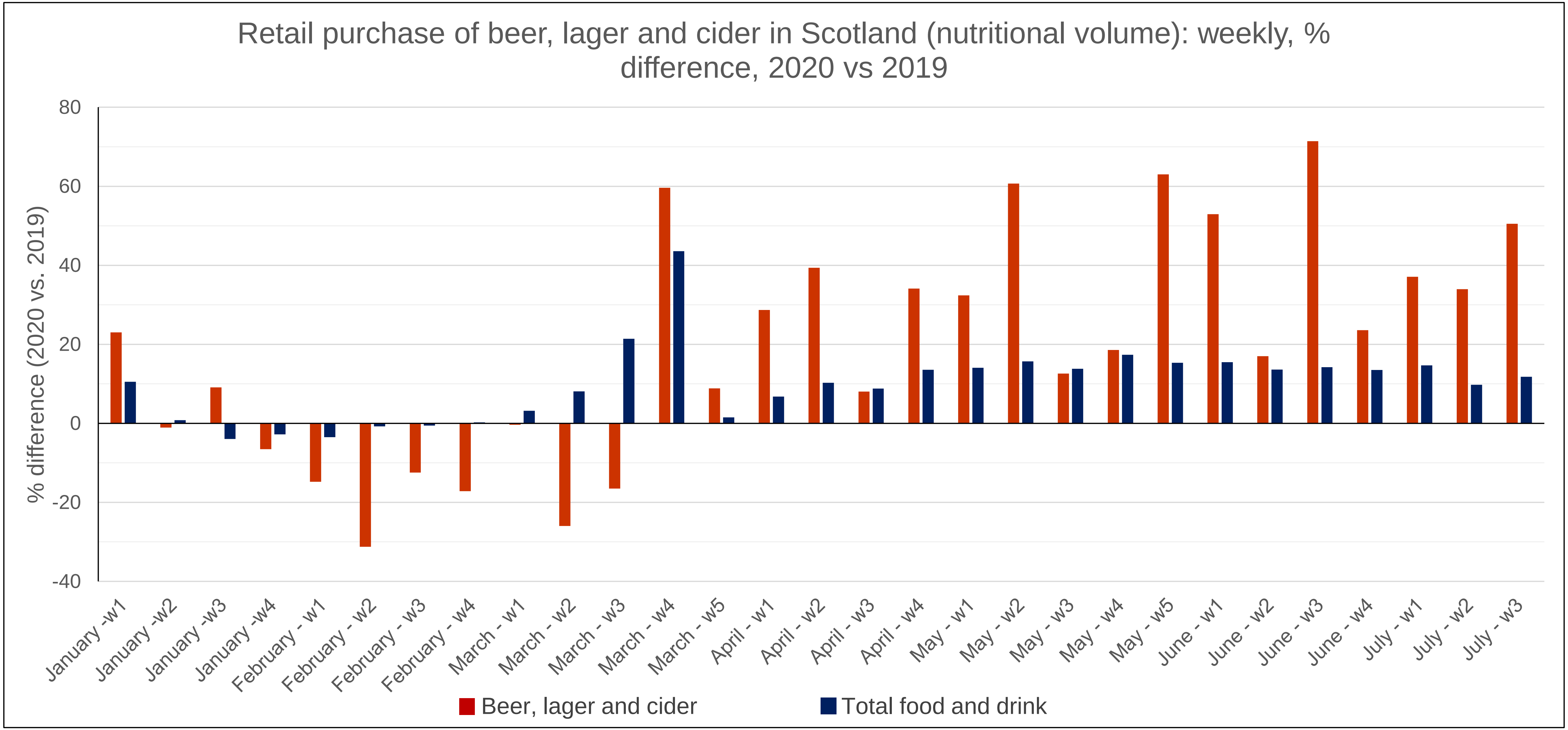
Food Standards Scotland, 2021

Purchase of wine was predominantly lower pre-lockdown compared to the same weeks in 2019. Afterwards it remained consistently higher, and from April onwards was higher than the change in total food and drink purchase.



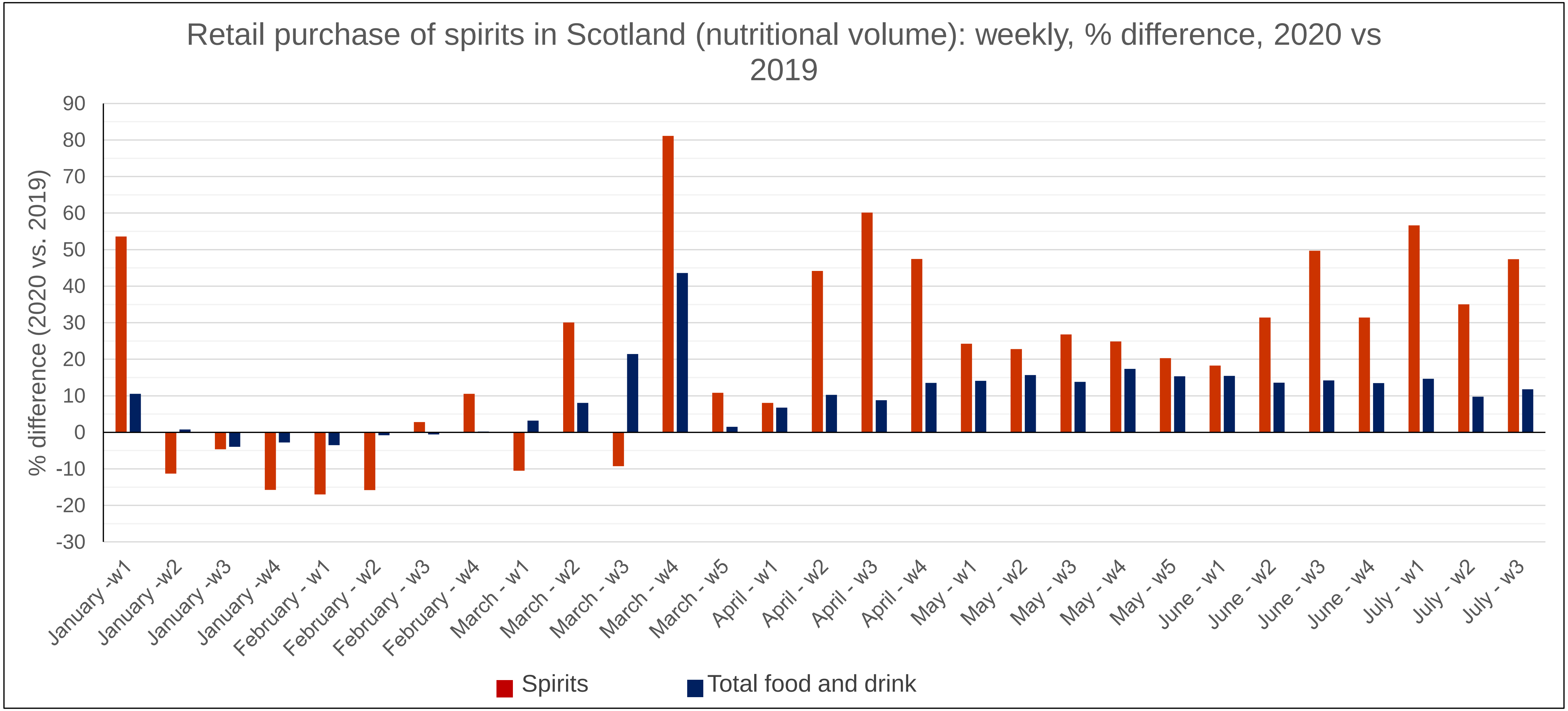
Food Standards Scotland, 2021

Purchase of beer, lager and cider was predominantly lower pre-lockdown compared to the same weeks in 2019. Afterwards, it generally remained higher than the change in total food and drink purchase.



Food Standards Scotland, 2021

Purchase of spirits was predominantly lower pre-lockdown for 2020 compared to the same week in 2019. Afterwards, it remained consistently higher and above the change in total food and drink purchase.



Food Standards Scotland, 2021

Purchase of alcoholic drinks: summary and conclusions

Purchase of total alcoholic drinks was predominantly lower pre-lockdown compared to the same weeks 2019.

Afterwards it remained consistently higher, peaking at 59% during week 4 of March, and above the percentage increase for total food and drink.

A similar pattern was found for individual types of alcoholic drinks.

Comparisons with data for Great Britain (GB)

Public Health England has also recently published data from Kantar which shows the impact of the COVID-19 pandemic on grocery shopping behaviours for GB (which includes data for Scotland) between week ending 22nd March 2020 and 21st June 2020.* Overall, this data is highly comparable to the data for Scotland presented in this report.

In Scotland, the data demonstrated a 44% increase in purchase of total food and drink in the week immediately before lockdown, compared to the same week in 2019. The GB data demonstrated the same level of increase.

Data on calories and nutrients aligns strongly between the GB and Scottish data. For example, data for Scotland showed that purchase of calories was 53% higher immediately before lockdown compared to 2019 whereas the GB data demonstrated a 52% increase. However, there was an apparent difference in the purchase of sodium. The data for GB demonstrated a 65% increase for sodium in this week, whereas the data for Scotland demonstrated a 56% increase in sodium.**

* Impact of COVID-19 pandemic on grocery shopping behaviours (publishing.service.gov.uk)

** It should be noted that the data for Scotland excludes sodium from table salt from the total sodium analysis.

Overall summary and conclusion (1)

Overall, the results demonstrated considerable changes in the volume of food and drink purchased from retail in the weeks leading up to lockdown in 2020 compared to the same weeks in 2019. The data presented within this report does not include purchasing out of home (OOH) and it is important to note that a significant proportion of the OOH sector stopped operating due to the national lockdown between March and July 2020 and a considerable proportion of purchasing behaviour moved from out of home to in home (i.e. retail). Additionally, the advice to stay at home and the closure of schools and many workplaces will have contributed to changes in purchasing patterns.

Purchase of total food and drink was 44% higher in the week before lockdown began (4th week of March 2020), compared to the same week in 2019.

The average number of retail trips per household was 42% higher in the week preceding lockdown compared to the same week in 2019. From April to July 2020, the number of retail trips remained consistently lower compared to 2019, ranging from 10% to 24% lower.

Compared to 2019, discounters and small retailers/convenience stores generally grew their share of total retail food and drink purchased in Scotland between March and July 2020. In contrast, supermarkets had a lower share of volume compared to 2019.

Overall summary and conclusion

Purchase of calories, total carbohydrates, total sugar, fibre, total fat, saturated fat and sodium was considerably higher throughout March 2020 compared to March 2019. The week immediately before lockdown began (week 4 of March) saw the greatest percentage increase in purchase across calories and nutrients. This increase ranged from 43% for total sugar, to 56% for sodium. The higher purchase of calories and nutrients in 2020 compared to 2019 was generally maintained between April and July.

All food and drink categories explored demonstrated a steep increase in purchase during the week immediately before lockdown compared to same week in 2019. This was particularly prominent within sweet home cooking (90%), canned goods (115%), savoury home cooking (121%) and ambient carbohydrates and snacks (130%).

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Next steps

FSS will continue to monitor weekly purchasing patterns during 2020 to explore the impact of the COVID-19 on retail food and drink purchasing patterns in Scotland.

A further report outlining purchasing patterns from July until December 2020 will be published in 2021. This report will include additional detail on purchase by social class, price promotion and online delivery for 2020 as a whole.

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