KANTAR

Out of home - Scotland 2021

Prepared for Food Standards Scotland

November 2022

Contents

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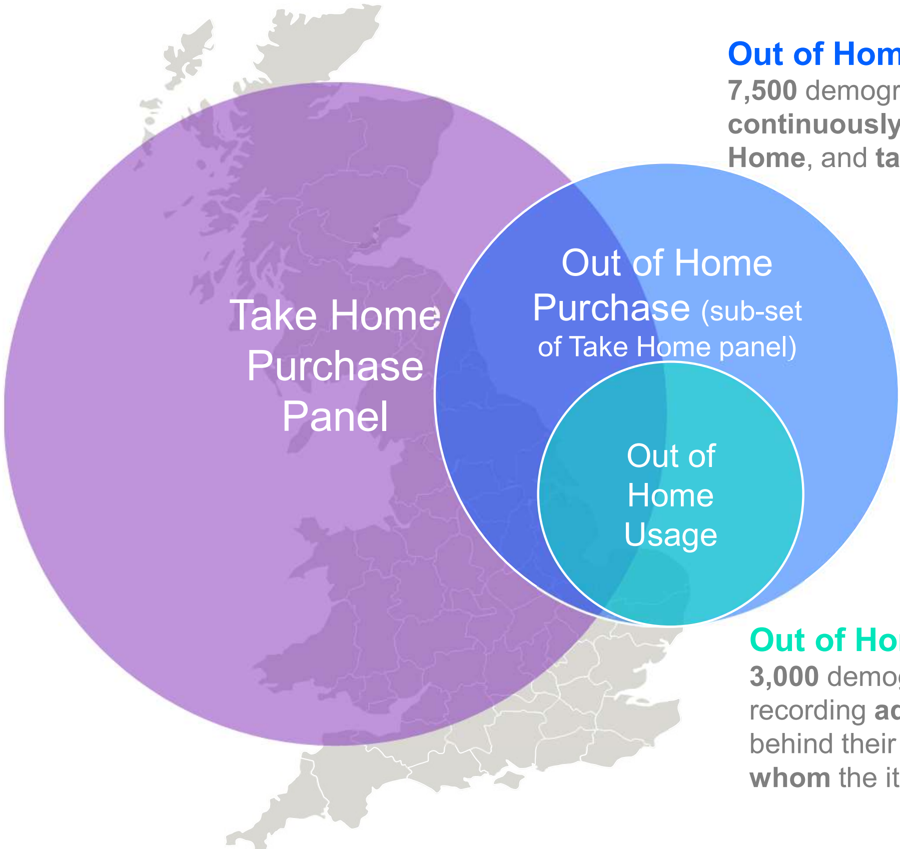
Methodology & definitions

Kantar's Out of Home panel is comprised of individuals from the households which make up Kantar's Take Home grocery panel.



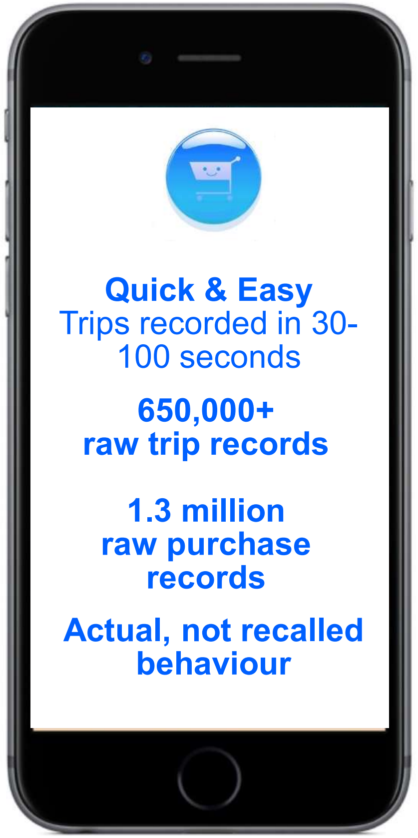
Out of Home Purchase

7,500 demographically **representative*** individuals **continuously** recording food **purchases Out of Home**, and **takeaways** brought into the home

All trips are recorded via an app meaning the panelist can record in the moment. This methodology is proven to give consistent measurement over time

Out of Home Usage

3,000 demographically representative* individuals recording **additional detail** about the **drivers** behind their purchase, and **where**, **when**, and **with whom** the items are **consumed**



KANTAR

*Of GB population aged 13-79

We collect data on anywhere you can buy food and non alcoholic drinks.

Market	Channel
Non-alcoholic cold drinks (inc. iced coffee)	Quick service restaurants (fast food outlets and takeaways)
Non-alcoholic hot drinks	Full service restaurants
Savoury snacks (e.g. crisps, nuts)	Pubs & bars
Sweet snacks (e.g. chocolate, cakes)	Café & coffee shops
Quick meals (e.g. sandwiches & salads)	Bakery & sandwich shops
Main meals	Supermarket – cafés & front of store
	Convenience stores
	All others (incl. workplace canteens, hotels, vending machines etc.)

We also ask additional information about each consumption occasion.

Needs	Main meal descriptor	Number of people present
Enjoy the taste Low in fat/salt/sugar Quick Asked for partner/children Can eat on the move Easy to come by etc.	Treat Celebratory Quick bite Social On the go Relaxing Together time etc.	1 person present 2 people present 3 people present 4 people present 5 people present 6 people present 7+ people present

Meal occasions	Where consumed	Bought for
Breakfast Morning snack Lunch Afternoon snack Evening meal Evening snack	On premise School/workplace Travel Outside Leisure outlet etc	Myself Another adult (Adult 16+) Child (0-15 years)

And there are some markets we don't capture, due to how our panel is built.

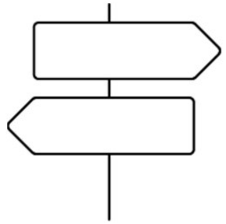
We report on the market as seen by the domestic consumer

Tourists and transient trade

We estimate tourists account for about £5 billion food and drink spend in the UK.

Business to business, and catering

Our panel is based on the point of purchase of individuals; and so does not include business to business or catering sectors.



Free food and drink

We don't capture any free food and drinks panellists have consumed out of home.

Throughout the presentation there is a view on demographics, broken down by:

Age of buyer:

Under 35 years old

35 – 54 years old

55 years old and over

Social class of buyer:

Social Class AB
Professional in senior management in business, middle-management, business owners

Social Class C1
Junior management and other non-manual workers

Social Class C2
Skilled manual workers

Social Class D
Semi-skilled and unskilled manual workers, apprentices and trainee of skilled workers

Social Class E
Unemployed, off sick, casual workers without regular income

Note social class has been used in the absence of robust data for SIMD (Scottish Index of Multiple Deprivation)

Rural vs urban

Office of National Statistics (ONS) definitions:

Urban

England and Wales - population of over 10k

Scotland - population is above 3k

Rural

England and Wales - population under 10k

Scotland - population below 3k

We have classified the channels to the way Food Standards Scotland report on the market.

Quick Service Restaurants

e.g. McDonald's, KFC, Burger King, Domino's Pizza, Papa John's, Independent outlets (e.g. fish & chip, kebabs)

Full Service Restaurants

e.g. Pizza Hut, Frankie & Benny's, Nando's, Pizza Express, Wagamama, Giraffe

Cafes and Coffee Shops

e.g. Costa Coffee, Caffè Nero, Starbucks, AMT Coffee, Pumpkin Café, department store cafes, independents

Convenience

Supermarket convenience stores, symbols and independents and high street

Pubs & Bars

e.g. Wetherspoons, Brewers Fayre, Harvester, Toby Carvery, Beefeater Grill

Bakery & Sandwich

e.g. Greggs, Subway, Pret, Krispy Kreme, Eat, Patisserie Valerie, Paul, Millie's Cookies

Supermarket cafes & front of store

Main store outlets and supermarket cafes

Other

Workplace, leisure, hotels, travel, vending and supermarket forecourts (garages)

The slide deck focuses on consumers' behaviour in Scotland, but where the sample is not robust GB data is used. The relevant data source is identified by a marker in the top right hand corner of each slide.

Scotland

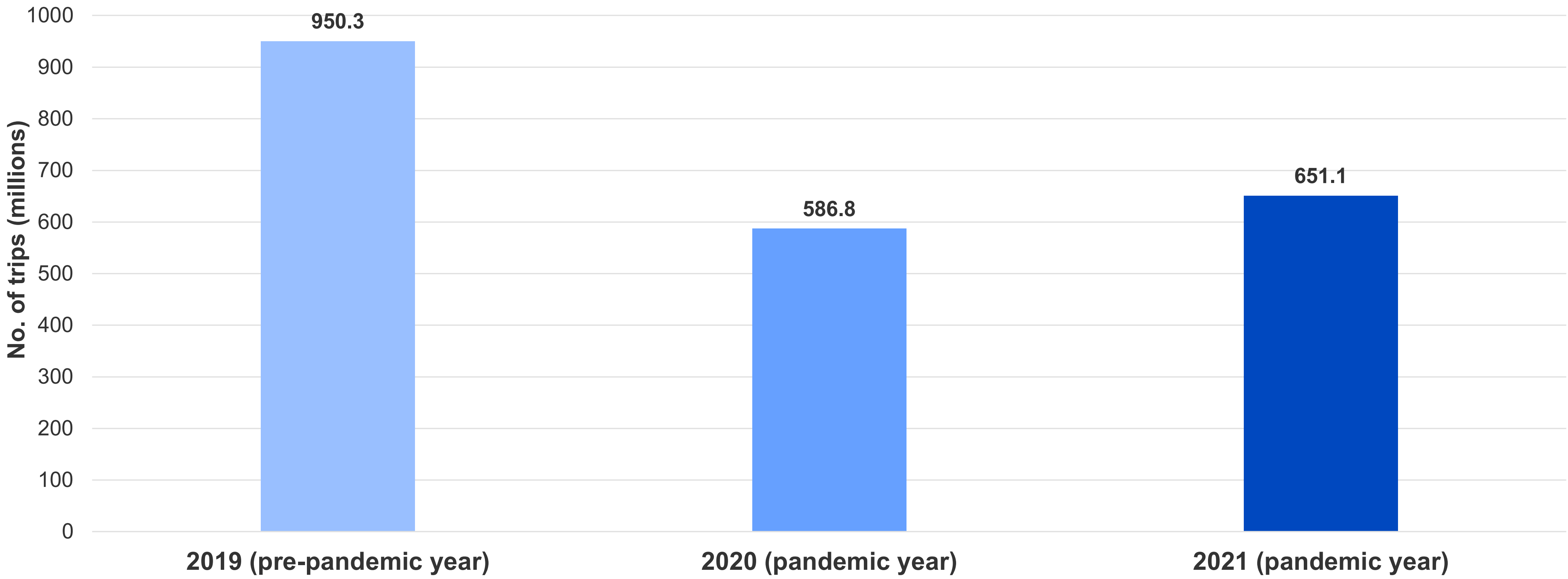
GB

Scotland

The slide deck will be comparing data from 2019 to both 2020 and 2021.

We are classifying both 2020 and 2021 as pandemic affected years, hence we are using 2019 as a benchmark for pre-pandemic behaviour:

Total Scotland – Out of home trips – No. of trips (millions) per year



Quick view glossary of measures used in report.

Out of home (OOH)	The OOH sector covers all the food and drink we eat outside the home, and from takeaways consumed inside and outside of the home
YA	Year ago, usually in the context of growth
Value/Spend, Value % and Spend %	Value spent on OOH food and non alcoholic drinks by all individuals
Trips, Trips %	Trips for OOH food and non alcoholic drink by all individuals
Trips per consumer	Average number of visits per consumer in the given time period
Penetration %	The % of the population buying the specified line in the given time period and region
Average spend per consumer	The total spend per consumer in the given time period
Average price per Item	The average price paid per item, £
Average spend per visit	The average spend per visit, £
PPT	Percentage points
Aggregator	A third party that facilitates the order of food from a restaurant to a consumer, e.g. Just Eat, Deliveroo
Symbols	A form of franchise of convenience shops, which act as suppliers to independent shops which then trade under a recognised logo (e.g. Spar, Londis)
Channel	Refers to the type of outlet where food and drink purchases were made out of home, e.g. full service restaurant, quick service restaurant

2
The out of home market in Scotland

GB

Scotland

During 2021, the out of home market in Scotland increased in value and average number of trips per week, compared to 2020. However these were still lower compared to 2019.

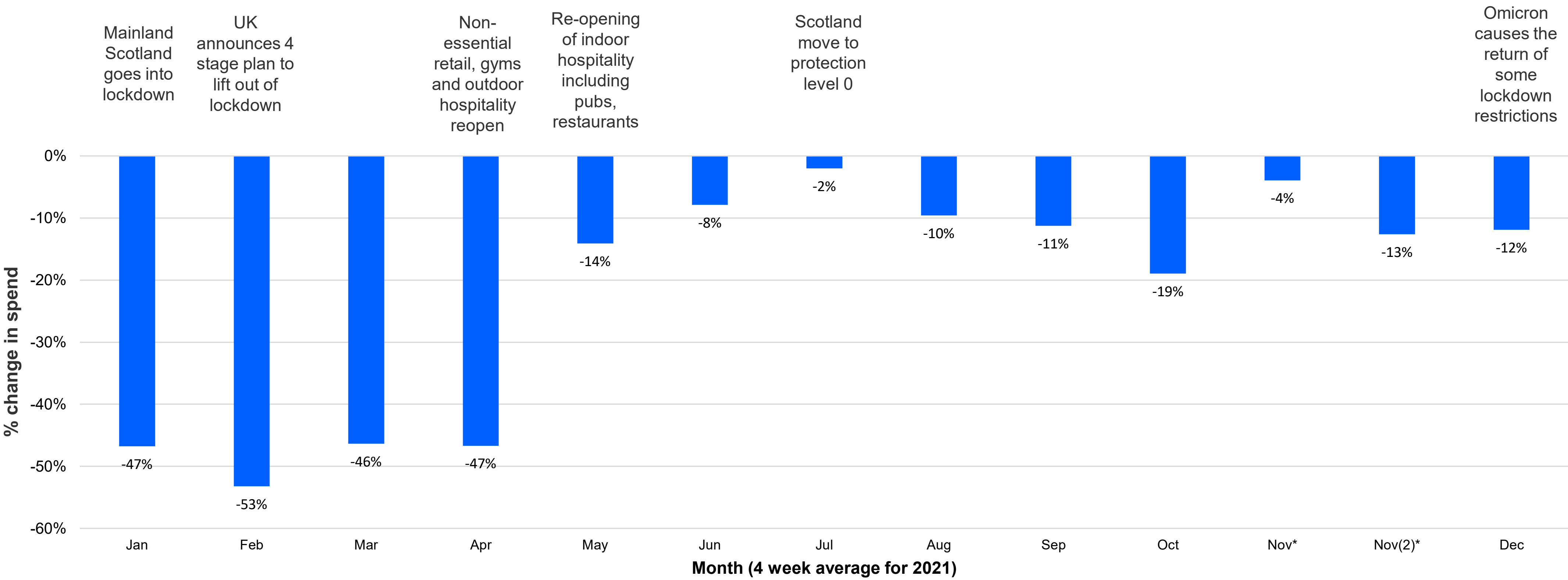
GB & Scotland - Total out of home - 2021 vs. 2020 & 2019

	value	penetration	trips each per week	spend per trip
GB	£43.8bn +23.1% vs. 2020 -16.9% vs. 2019	96.0% -0.1ppt vs. 2020 -2.7ppt vs. 2019	3.5 +14.2% vs. 2020 -23.4% vs. 2019	£4.83 +7.1% vs. 2020 +10.0% vs. 2019
SCOTLAND	£3.6bn +21.2% vs. 2020 -21.9% vs. 2019	95.9% -0.2ppt vs. 2020 -3.1ppt vs. 2019	2.9 +10.5% vs. 2020 -29.5% vs. 2019	£5.58 +9.3% vs. 2020 +14.1% vs. 2019

In 2021, spend in the out of home market in Scotland was lower compared to 2019, particularly during times of lockdown. Once restrictions were lifted this quickly returned towards pre-pandemic levels.

Scotland

Total out of home – Spend 2021 vs. 2019 (% change)



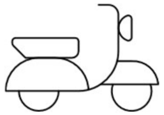
KANTAR

Kantar Out of Home | Total Market Spend | 52 w/e 26th Dec 21 v. 52 w/e 29th Dec 19

*Note – two data points are included for November as covers 4 w/e 1 Nov and 29 Nov 2021

Quick service restaurants (QSRs) were the only channel to see growth in 2021 vs. 2019, likely due to their ability to pivot to delivery and takeaway, which enabled these businesses to remain operational throughout restrictions.

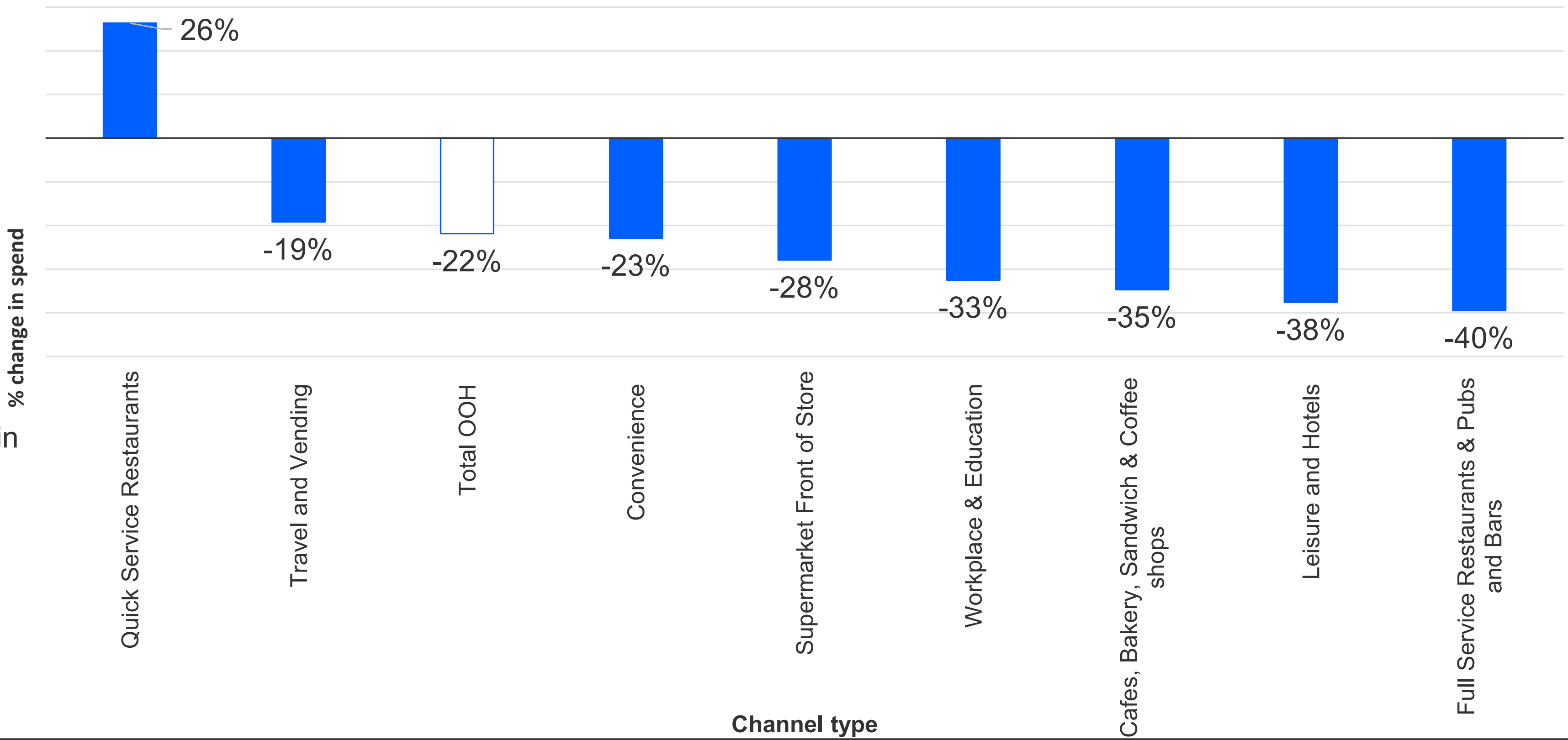
Total out of home - Spend 2021 vs. 2019 (% change) by channel type



40%

of Scotland's QSR value in 2021 has come through ***delivery***

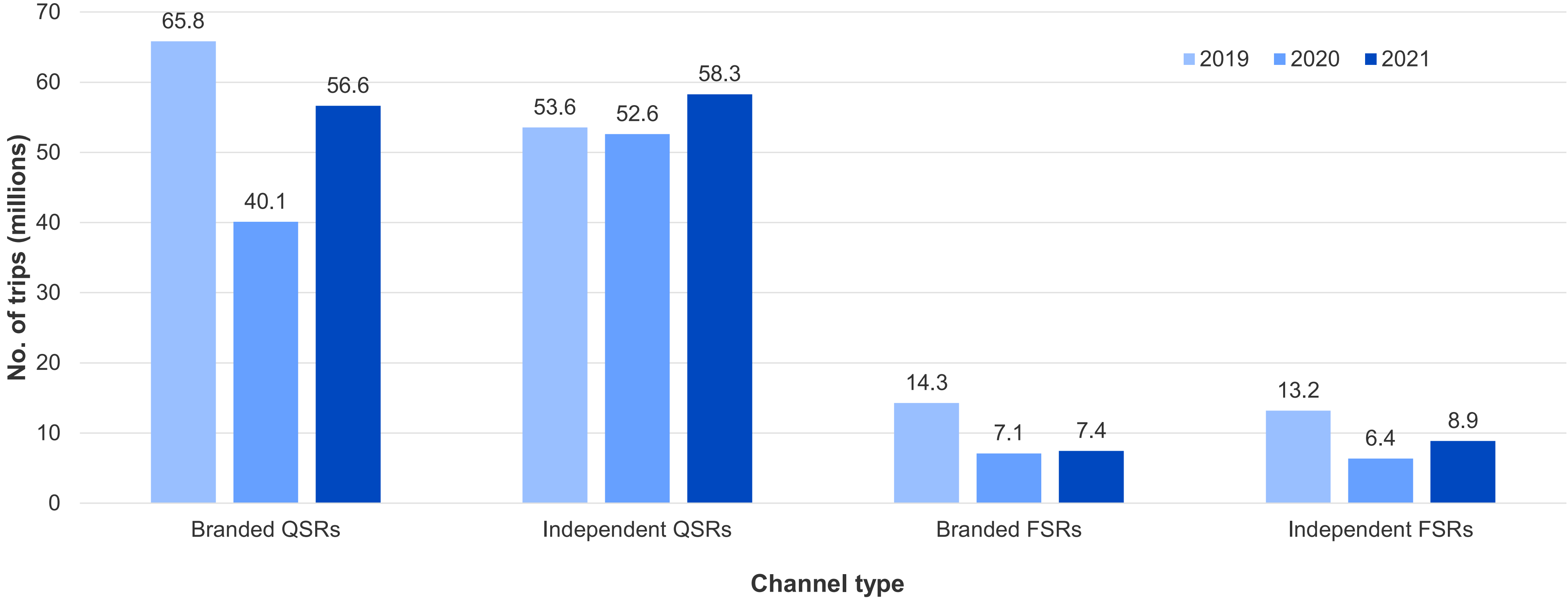
vs. 22% in 2019



For quick service restaurants (QSRs), the number of trips out of home grew overall in 2021 vs. 2020 and 2019 for independent businesses. For full service restaurants (FSRs) the number of trips were lower in 2020 vs. 2019, but increased slightly in 2021.

Scotland

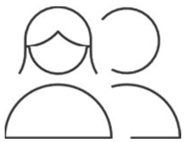
Total QSRs & FSRs – No. of trips (millions) per year by channel type



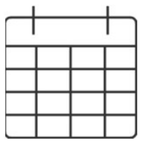
Scotland

Independent quick service restaurants (QSRs) grew through new customers, driven by a rise in trips to Chinese and pizza outlets.

Independent QSR (2021)

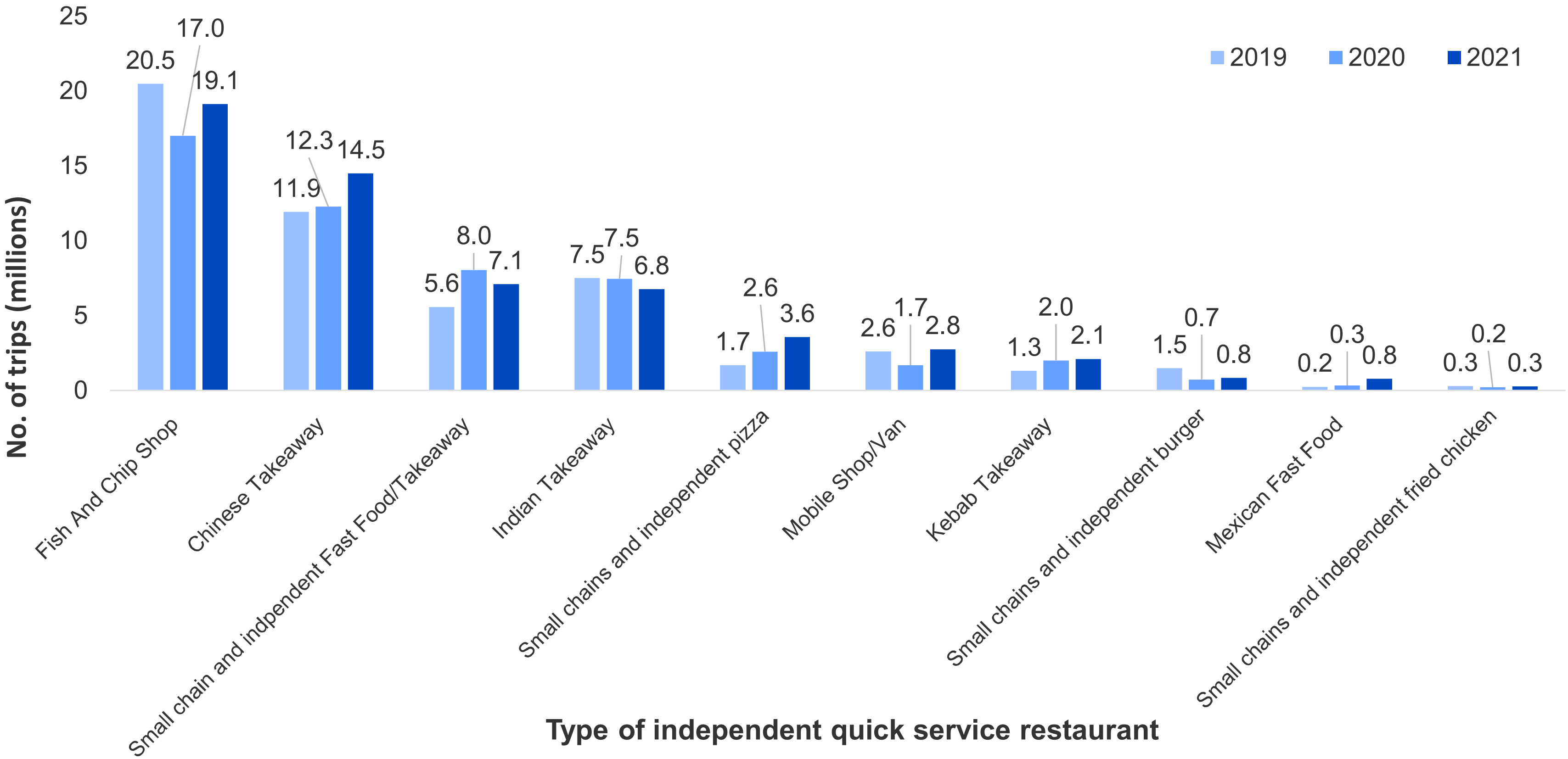


Penetration
69.8%
+4.5ppts versus 2020



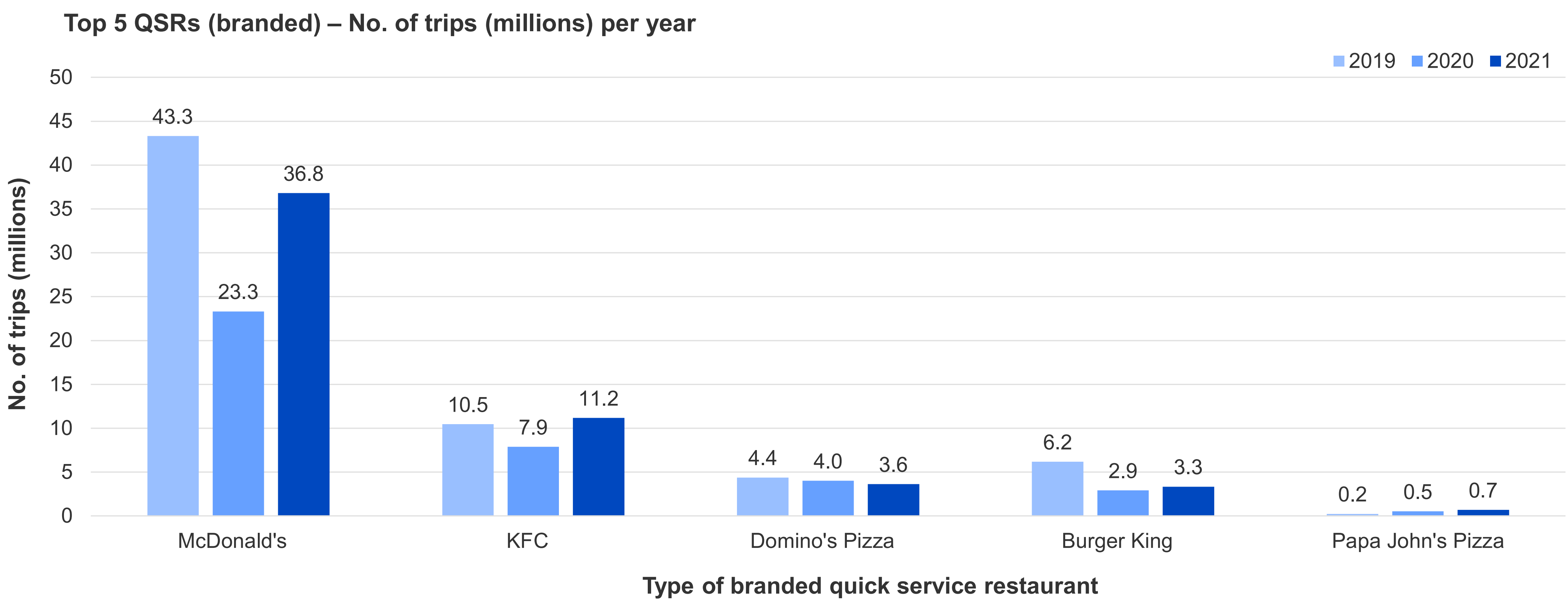
Frequency
18.5 Trips
+0.5 versus 2020

Top 5 QSRs (independent) – No. of trips (millions) per year



Within the branded quick service restaurants (QSRs), McDonald's had the highest number of trips over the three years, with 36.8 million trips in 2021. KFC also experienced growth over the last three years.

Scotland



The out of home market in Scotland - Summary

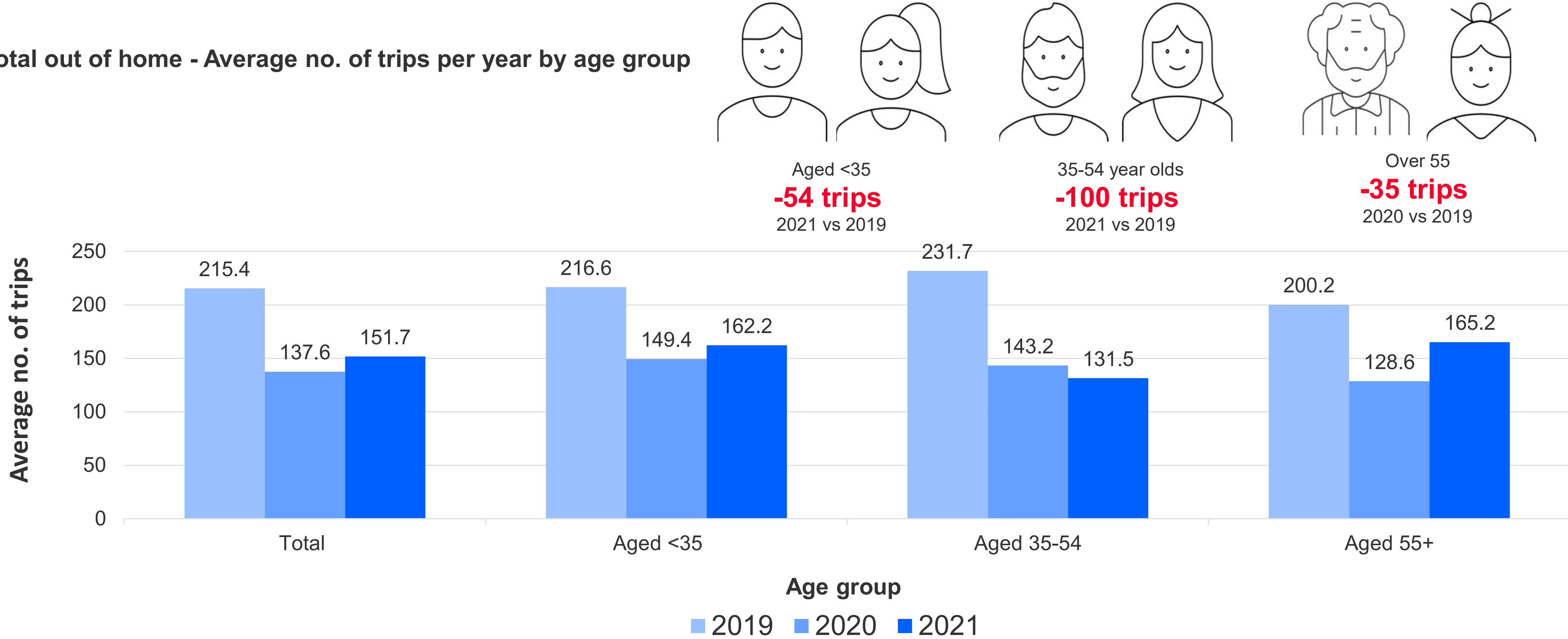
- In 2021, Scotland experienced market increases in the OOH sector for spend and average number of trips per week, compared to 2020. However these were still in decline compared to 2019.
- Spend for full service restaurants and pubs & bars reduced by 40% in 2021 compared to 2019.
- Quick service restaurants were the only channel to see growth in 2021 versus 2019, likely due to their ability to pivot to delivery and takeaway.
- Independent quick service restaurants grew through new customers in 2021.

3
Out of home - Consumers

Of the three age brackets, those aged 35-54 experienced the largest reduction in average number of trips for 2021 vs. 2019. Those aged 55 and over had the smallest reduction.

Scotland

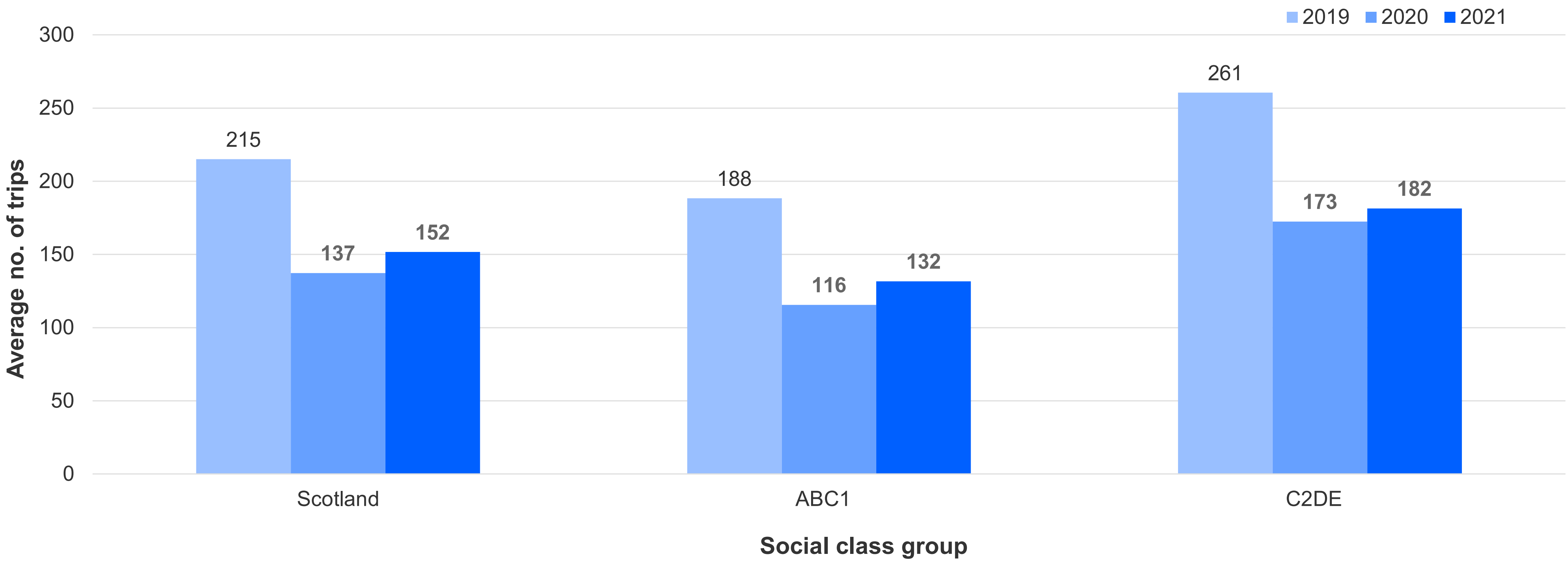
Total out of home - Average no. of trips per year by age group



Consumers from social class group C2DE had a higher average number of trips out of home for all three years compared to consumers from social class group ABC1.

Scotland

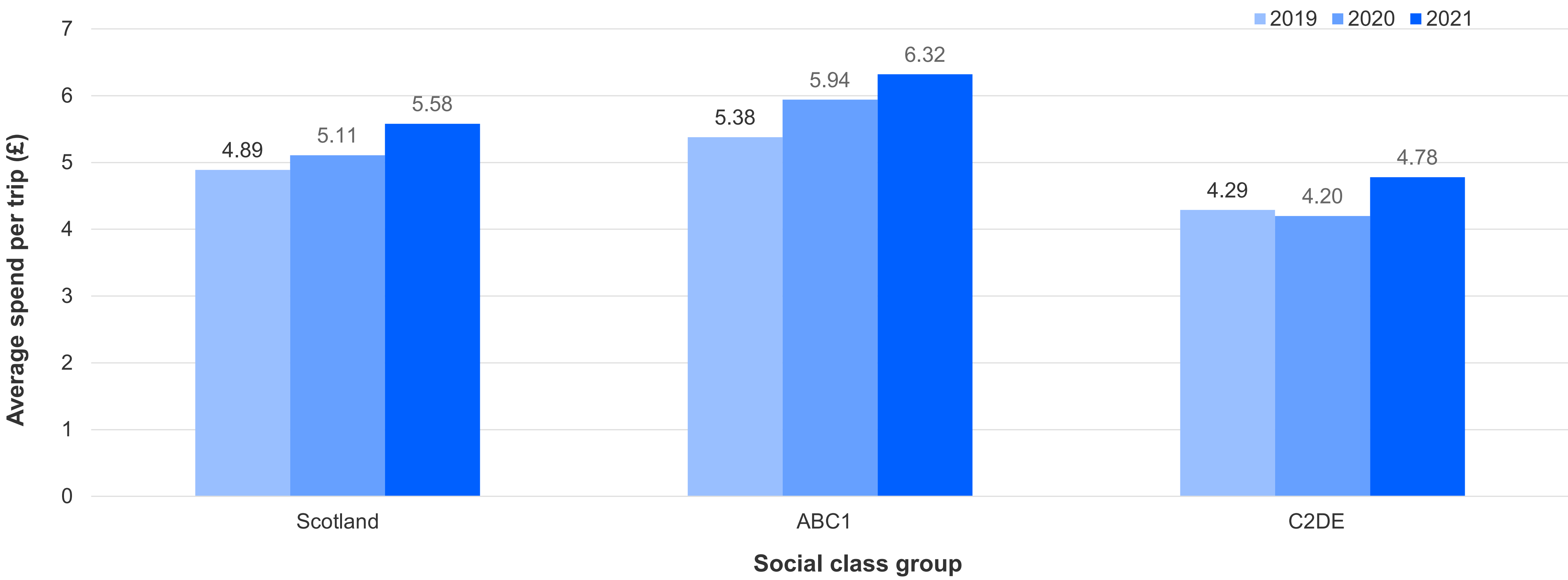
Total out of home – Average no. of trips per year by social class group



Consumers from social class group ABC1 spent more on average per trip out of home over the three years compared to consumers from social class group C2DE.

Scotland

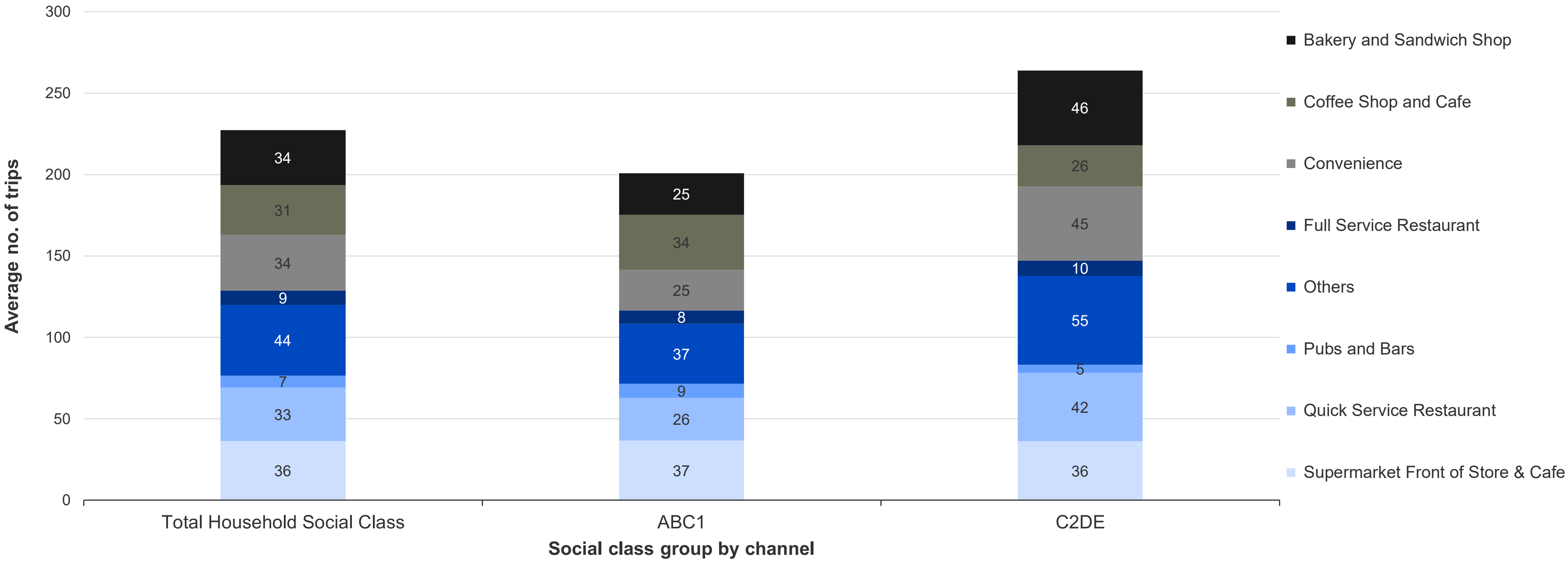
Total out of home – Average spend per trip per year by social class group



Consumers from social class group C2DE visited quick service restaurants (QSRs), convenience stores and bakery & sandwich shops more frequently than the average, whilst consumers from social class group ABC1 made more trips to coffee shops & cafes and pubs & bars.

Scotland

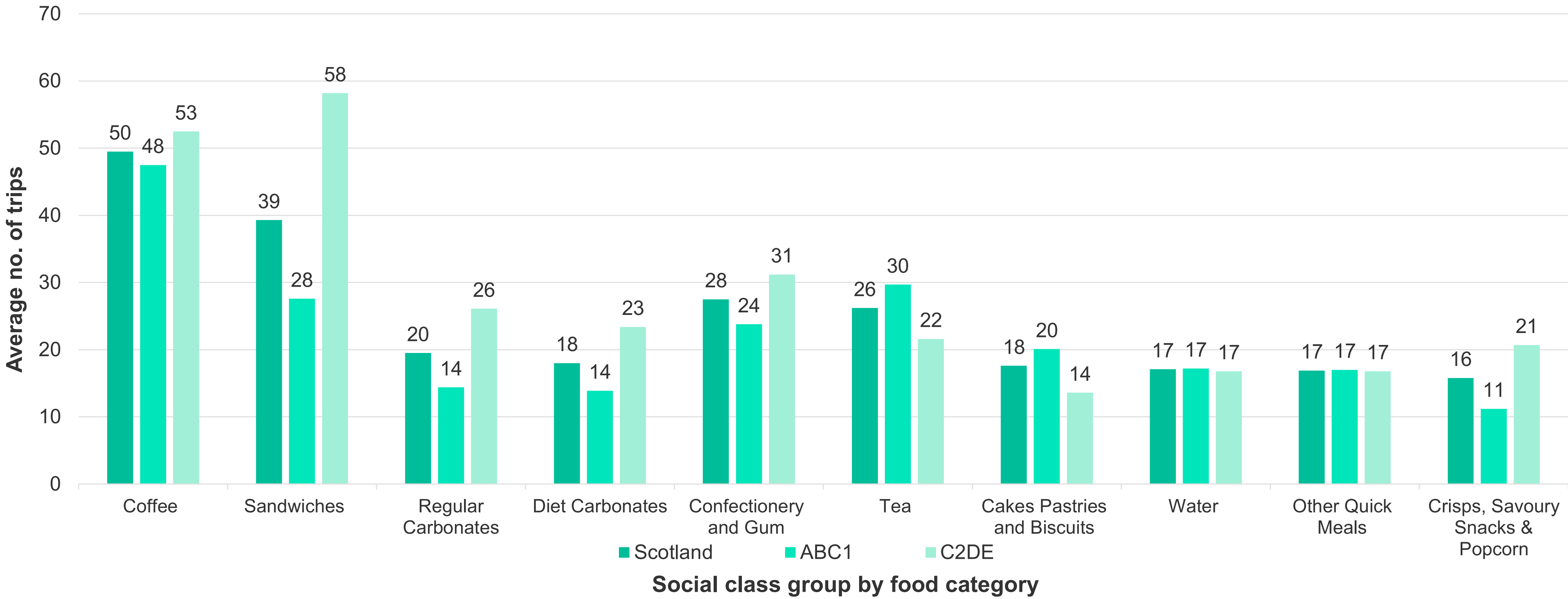
Total out of home – Average no. of trips in 2021 by social class group and channel



Scotland

In 2021 consumers from social class group C2DE had the highest average number of trips where they purchased coffee, sandwiches and confectionery, whilst consumers from social class group ABC1 had the highest average number of trips where they purchased tea and cakes, pastries & biscuits.

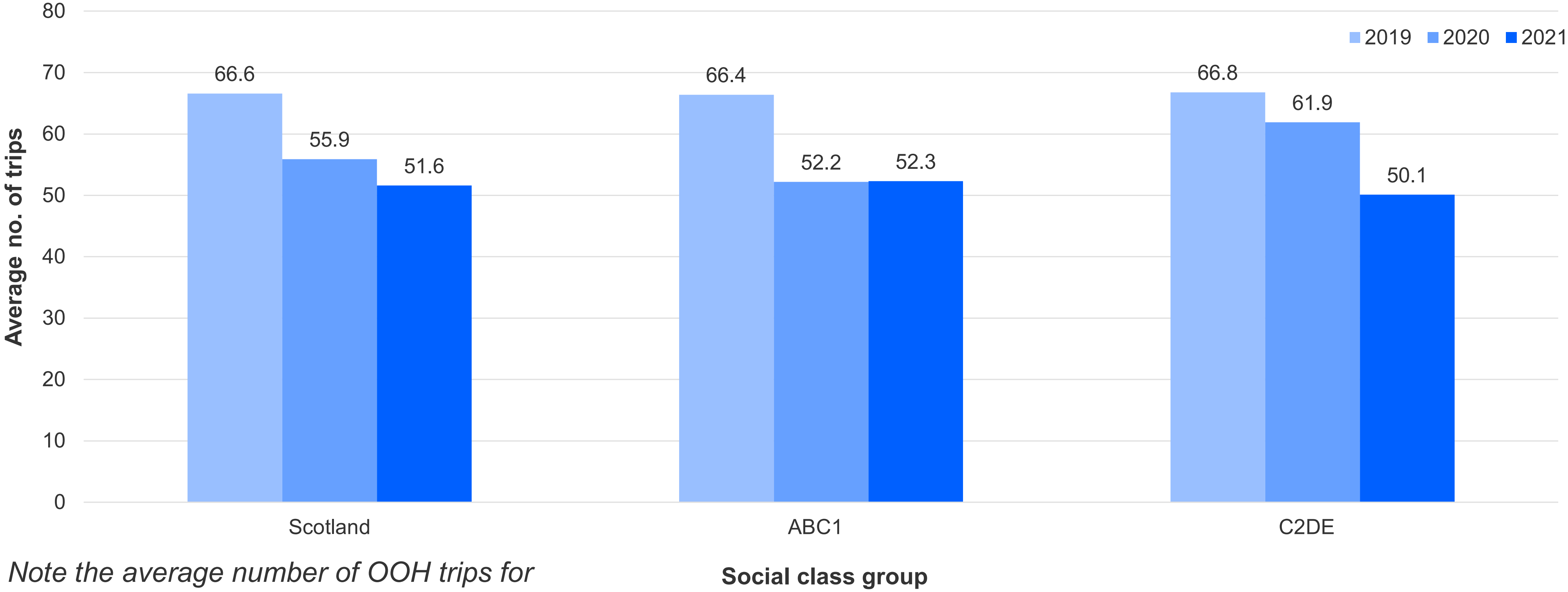
Total out of home – Average no. of trips for 2021 by social class group and food category (top 10 most frequent)



Consumers from social class group C2DE had the biggest reduction in the average number of trips per year featuring a promotion in 2021 vs. 2019, which is now less than consumers from social class group ABC1.

Scotland

Total out of home – Average no. of trips per year featuring a promotion by social class group

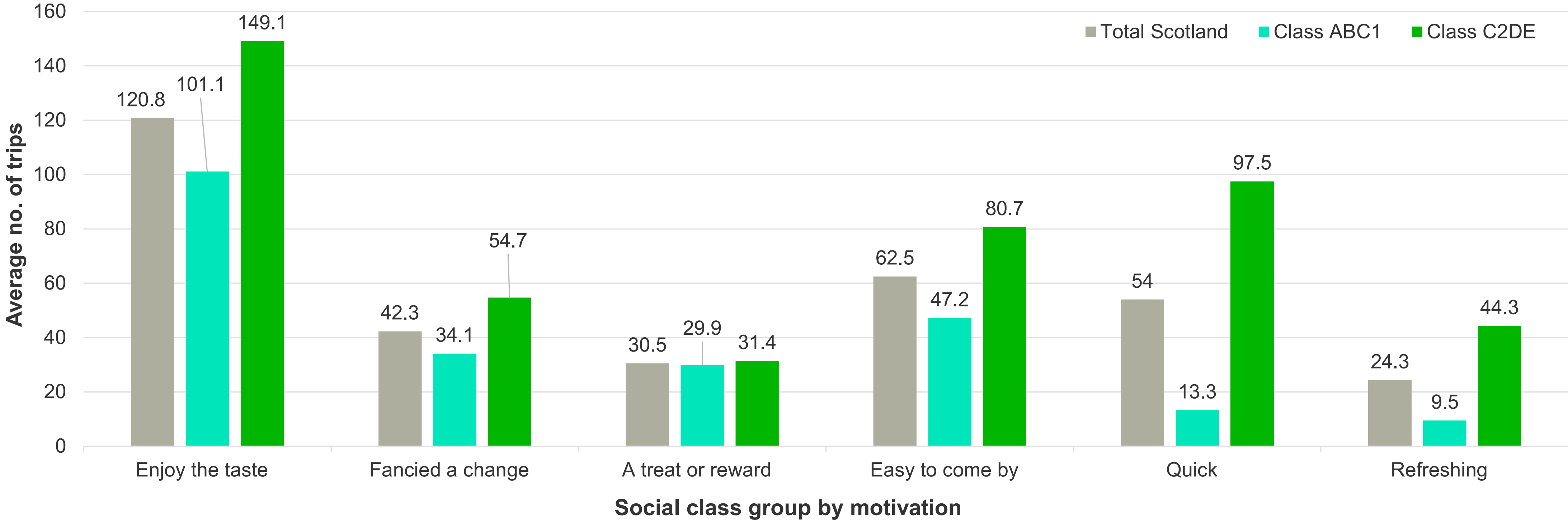


Note the average number of OOH trips for Scotland was 152 in 2021

Enjoying the taste, ease and quickness are the biggest motivators for eating out of home for all consumers, particularly those from social class group C2DE.

Scotland

Total out of home – Average no. of trips for 2021 by social class group & motivation



Consumers from rural areas visited out of home more often than consumers from urban areas, with an increase in trips per person of 11.5% for urban and 8% for rural in 2021 compared to 2020.

Scotland

Urban consumers

96%
penetration
-3.2ppt vs 2019
-0.6ppt vs 2020

£6.13
average trip spend
+16.5%vs 2019
+9.3%vs 2020

135
Trips per person
-30.3% vs 2019
+11.5%vs 2020

Rural consumers

95.8%
penetration
-2.9ppt vs 2019
+0.7ppt vs 2020

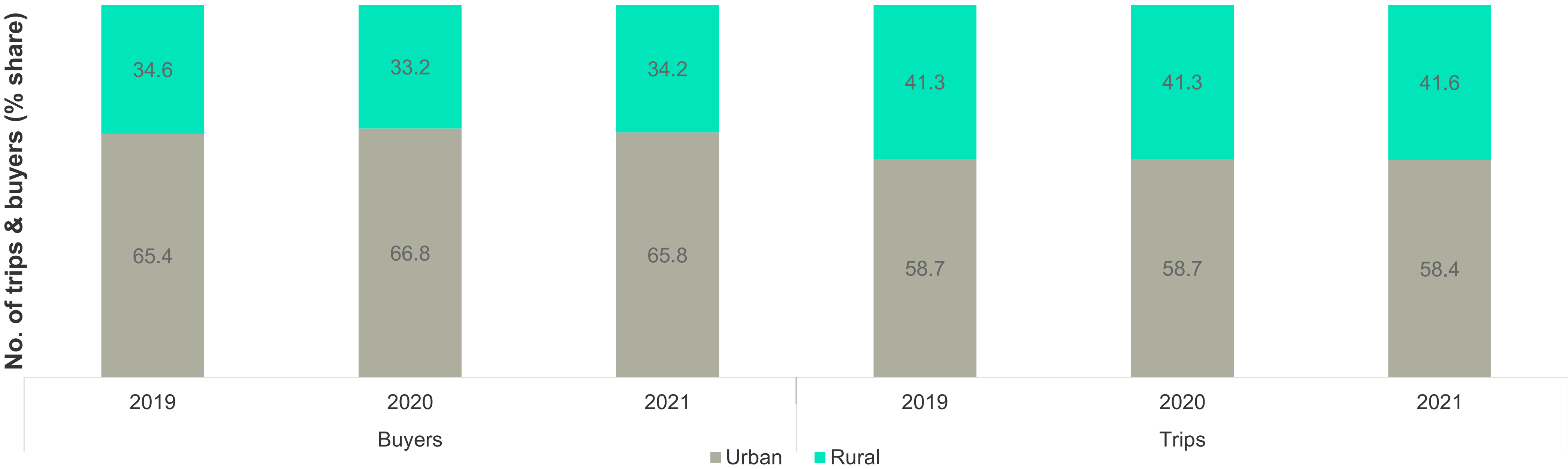
£4.82
average trip spend
+10% vs 2019
+9.5%vs 2020

185
Trips per person
-28.1% vs 2019
+8.0%vs 2020

Although consumers from rural areas represent a smaller proportion of buyers than those from urban areas, they visit out of home more frequently and therefore account for a greater proportion of trips in relative terms.

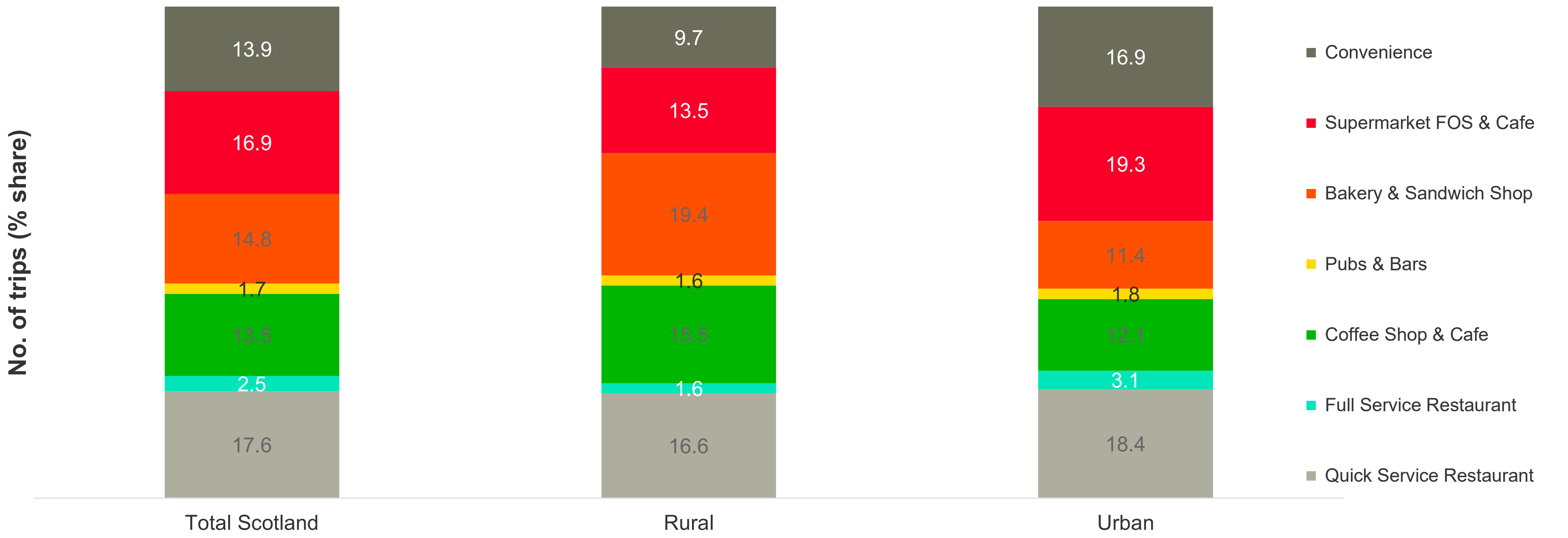
Scotland

Total out of home – No. of trips and buyers (% share) per year by urban vs. rural



Consumers from rural areas had a higher proportion of visits to bakery & sandwich shops and coffee shops & cafes than consumers from urban areas. Consumers from urban areas had a higher proportion of visits to quick and full service restaurants and convenience stores.

Total out of home – No. of trips (% share) for 2021 by urban vs. rural and channel type



Consumers - Summary

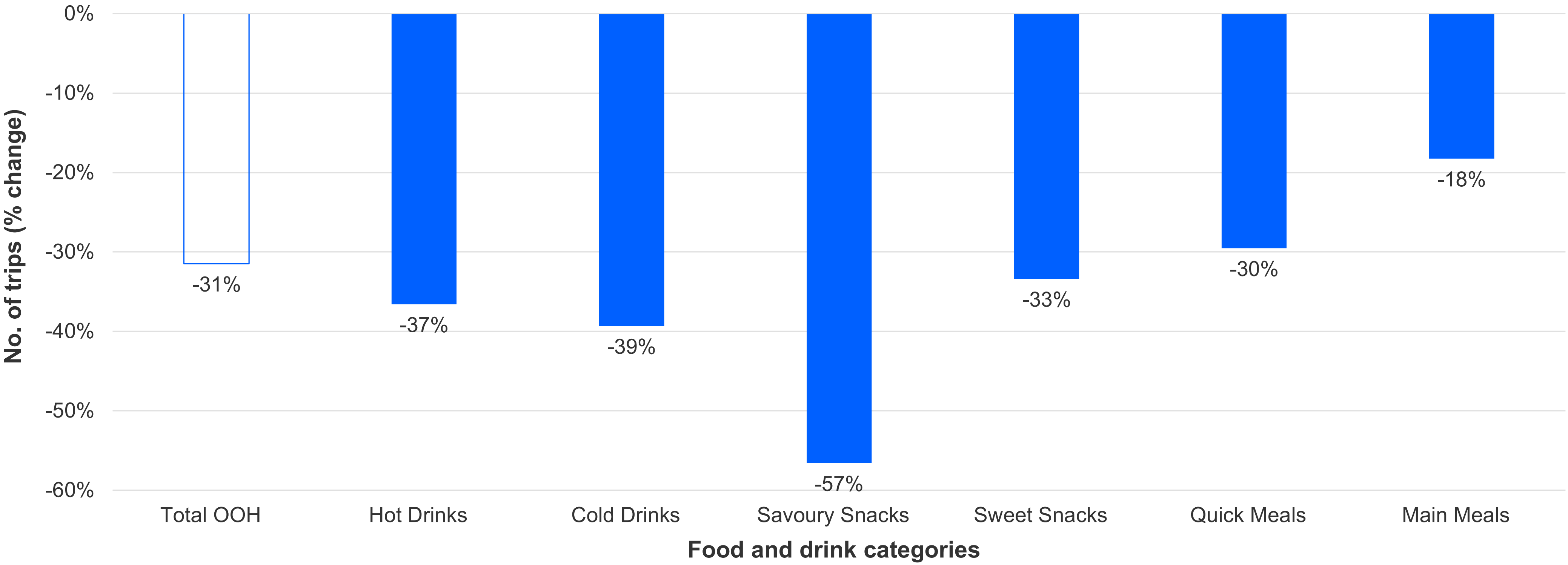
- In Scotland in 2021, those aged 35-54 experienced the largest reduction in average number of trips OOH, whilst those aged 55 and over had the smallest reduction, compared to 2019.
- In 2021, consumers from social class group C2DE had a higher average number of trips OOH compared to consumers from social class group ABC1.
- Consumers from social class group C2DE visited quick service restaurants more frequently than consumers from social class group ABC1.
- In 2021, consumers from social class group C2DE had more trips on average motivated by practicality, such as ease and quickness, than consumers from social class group ABC1.
- Consumers from rural areas visited out of home more often than consumers from urban areas in 2021.
- Consumers from urban areas were more likely to visit quick and full service restaurants and convenience stores than consumers from rural areas.

4
Out of home - Consumption

All food and drink categories experienced a reduction in trips in 2021 compared to 2019. Main meals were less impacted while savoury snacks saw the greatest decline.

Scotland

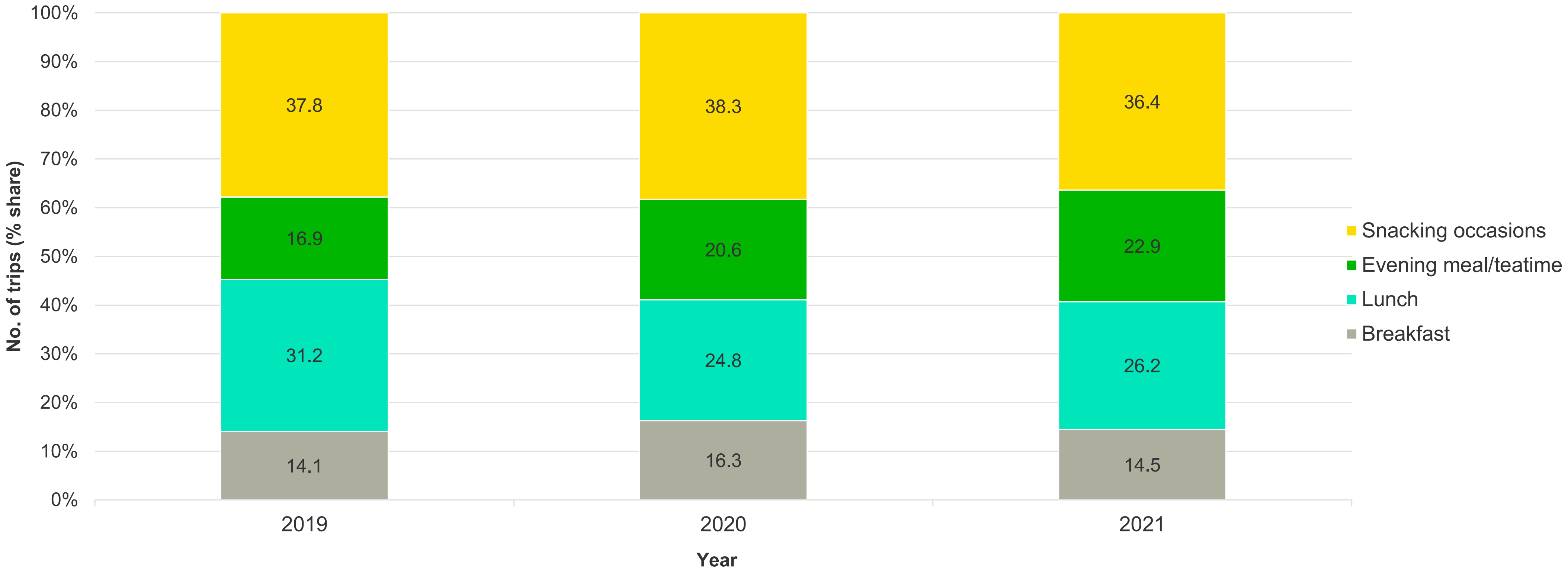
Total out of home – No. of trips (% change) for 2021 vs. 2019



When comparing the three years, there has been an overall decrease in the percentage share of out of home trips for lunches, and an increase for evening meal/tea time trips.

Scotland

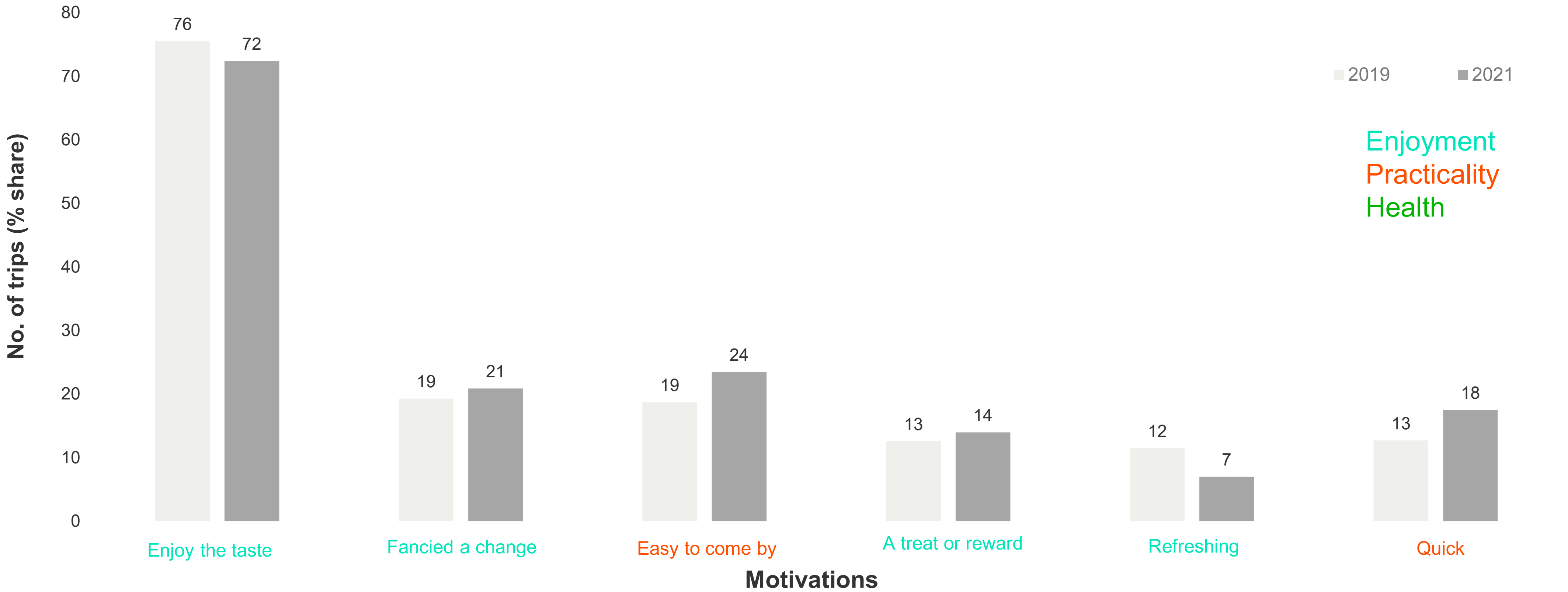
Total out of home - No. of trips (% share) for meal occasion by year



With regards to motivations for eating out of home, enjoying the taste was slightly less important, whilst practical reasons such as ease and quickness were more important in 2021 vs. 2019.

Scotland

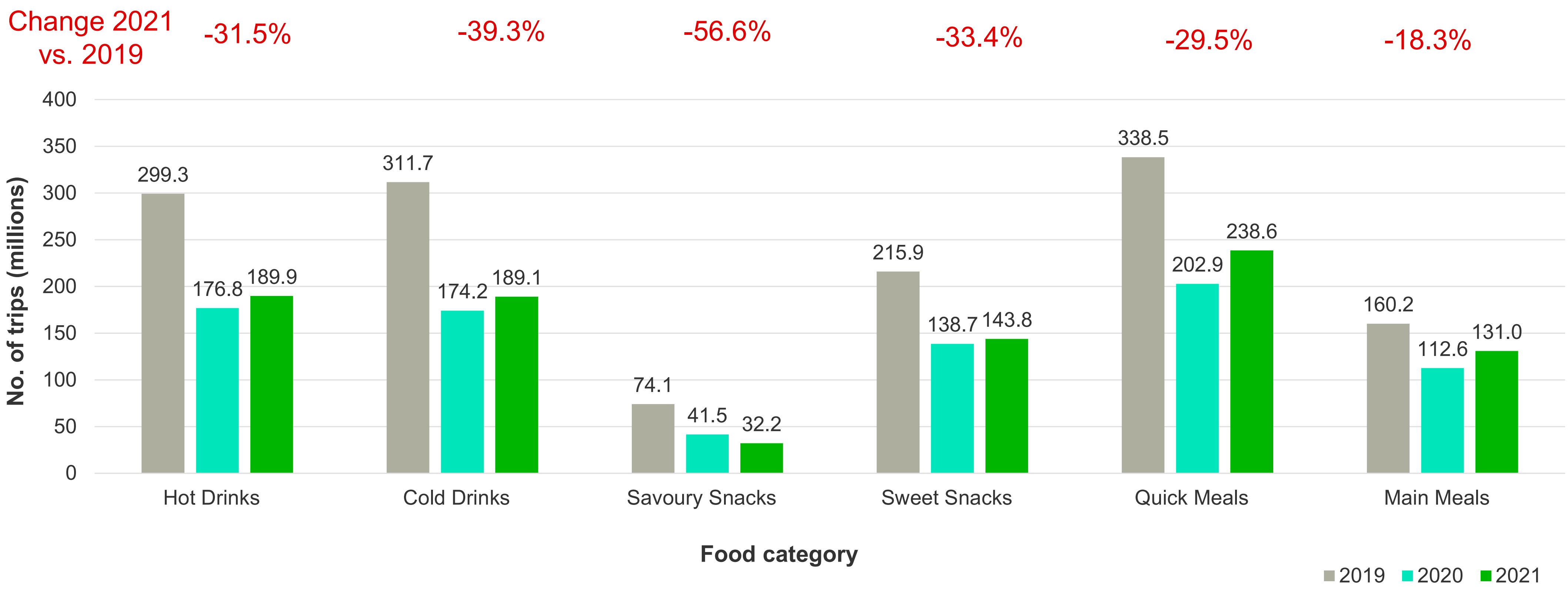
Total out of home – No. of trips (% share) by motivations for 2021 vs. 2019



Cold drinks and savoury snacks have seen the steepest reduction in out of home trips in 2021 compared to 2019.

Scotland

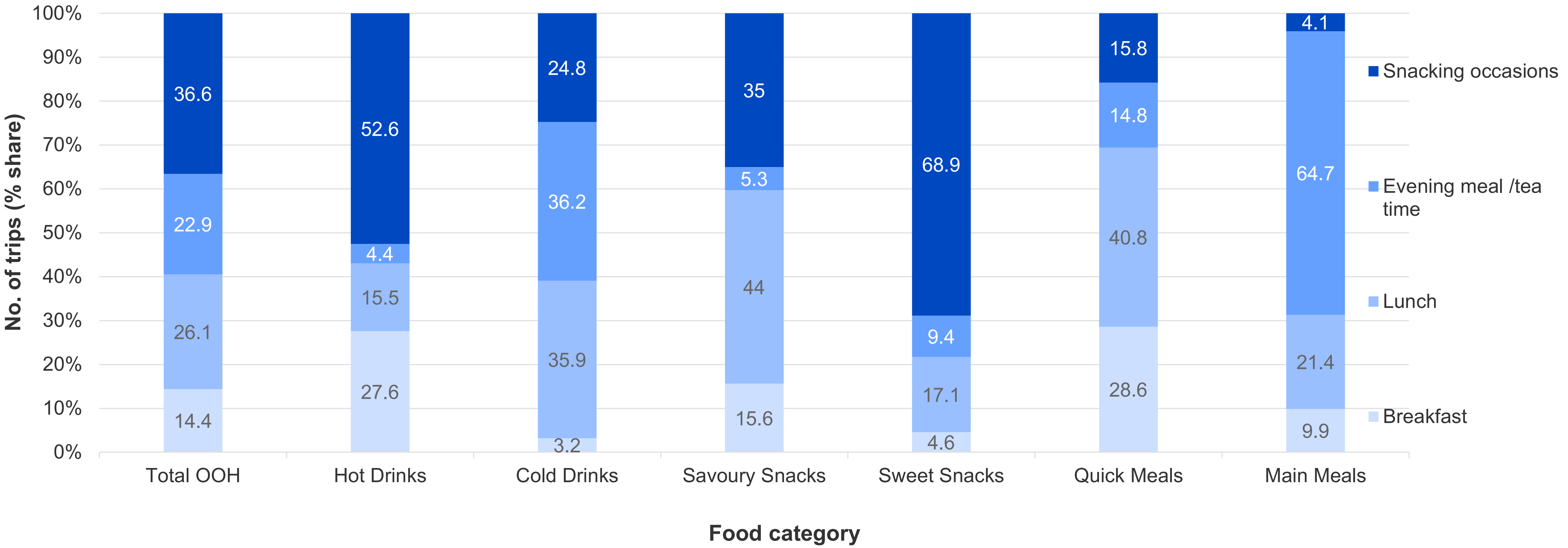
Total out of home - No. of trips (millions) by food category per year



In 2021, main meals had the biggest proportion of evening meal/tea time trips. Snacking was the most common occasion for sweet snacks, hot drinks and total out of home trips.

Scotland

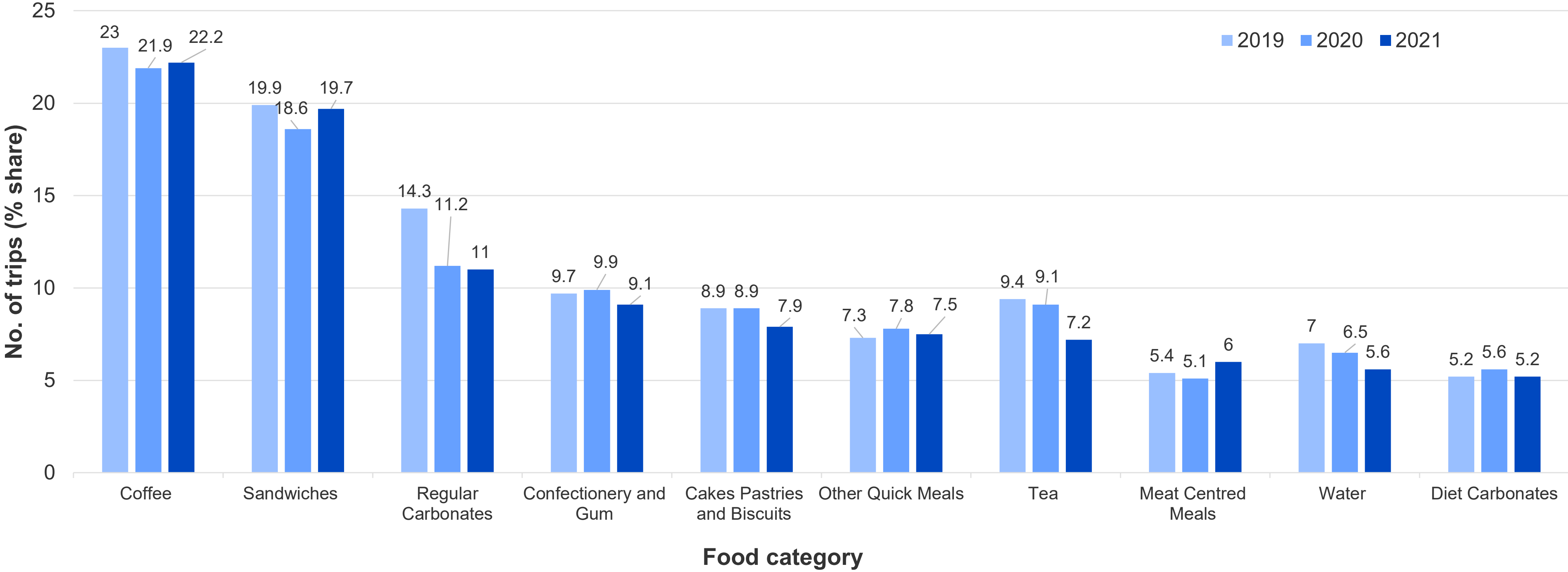
Total out of home – No. of trips (% share) for 2021 by category & meal occasion



The top 10 food categories remained fairly consistent over the three years with coffee having the largest share of trips out of home, followed by sandwiches.

Scotland

Total out of home – No. of trips (% share) per year by food category (top 10 categories)

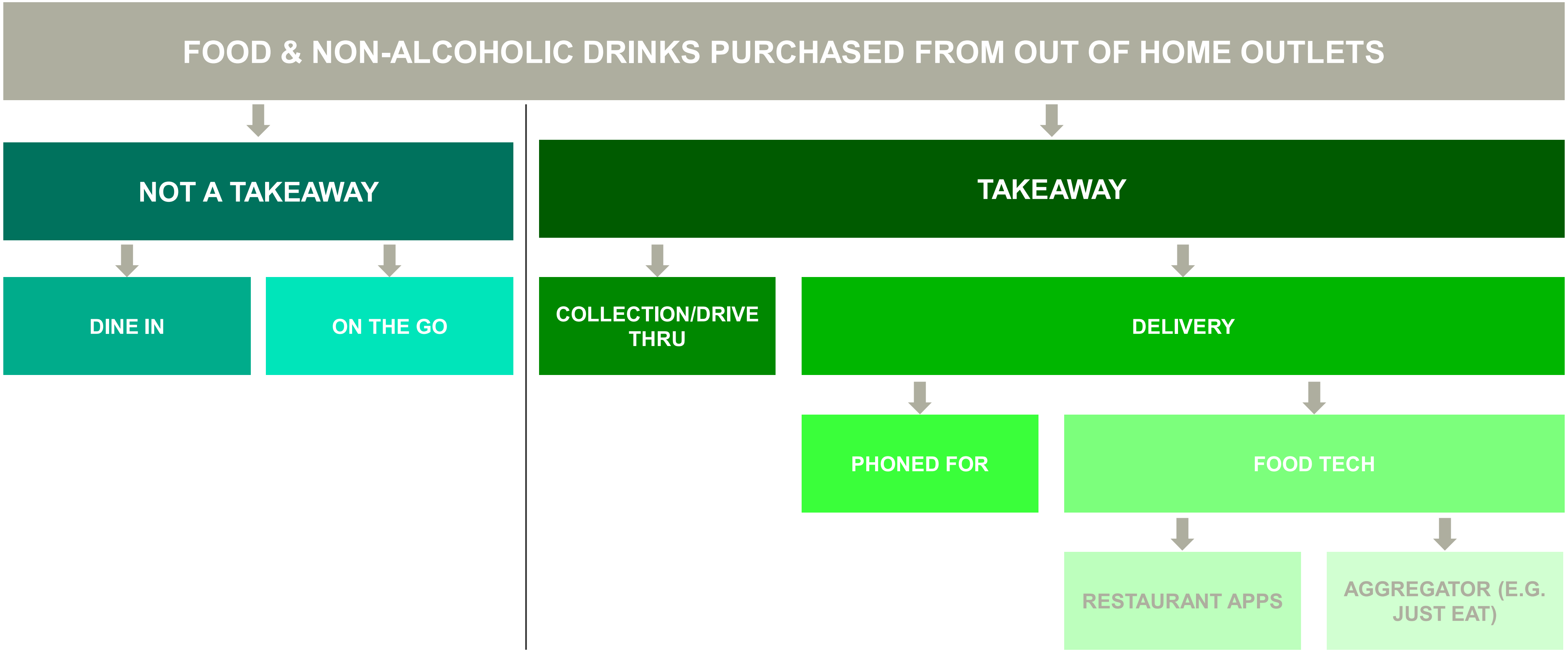


Out of home consumption - Summary

- All food and drink categories experienced a reduction in trips in 2021 compared to 2019. Savoury snacks were the most impacted while main meals the least impacted.
- There has been an overall decrease in the percentage share of OOH trips for lunches, and an increase for evening meal/tea time trips, over the three years.
- In 2021, the share of trips chosen for practical reasons such as ease and quickness increased, compared to 2019.
- The top food categories remained fairly consistent over the three years, with coffee holding the largest share followed by sandwiches.

5
Takeaway and delivery

When panellists submit their purchases we ask how they bought it, this allows us to get a takeaway read which this section will focus on.



The takeaway and delivery market has seen strong growth in Scotland and GB. Scotland saw an 88% increase in value and 93% increase in average number of trips per year compared to 2019.

GB

Scotland

GB & Scotland - Total takeaways including delivery - 2021 vs. 2020 & 2019

GB	£19.8bn value **+49.4% vs. 2020** **+139% vs. 2019**	85.6% penetration **+5.1ppt vs. 2020** **+10.9ppt vs. 2019**	67.2 trips each per year **+73% vs. 2020** **+135% vs. 2019**	£6.66 spend per trip **-19.4% vs. 2020** **-12.4% vs. 2019**
SCOTLAND	£1.5bn value **+43.4% vs. 2020** **+88.1% vs. 2019**	83.7% penetration **+4.3ppt vs. 2020** **+7.5ppt vs. 2019**	61.6 trips each per year **+69.9% vs. 2020** **+93.4% vs. 2019**	£6.71 spend per trip **-19.6% vs. 2020** **-11.7% vs. 2019**

The delivery market has seen strong growth, both in Scotland and GB compared to 2019, but spend per trip has reduced.

GB

Scotland

GB & Scotland - Total deliveries - 2021 vs. 2020 & 2019

	Value	Penetration	Trips	Spend per trip
GB	£7.6bn Value **+30.1% 2020** **+227% vs. 2019**	58.2% Penetration **+6.4ppt 2020** **+25.5ppt vs. 2019**	18.9 trips each per year **+28.5% 2020** **+109% vs. 2019**	£13.41 spend per trip **-10.7% 2020** **-13.3% vs. 2019**
SCOTLAND	£573m Value **+34.5% 2020** **+155% vs. 2019**	59.5% Penetration **+1.4pp 2020** **+24.4pp vs. 2019**	14.9 trips each per year **+48% 2020** **+70.1% vs. 2019**	£14.41 spend per trip **-18.0% 2020** **-11.9% vs. 2019**

Over a third of all out of home trips were takeaways in 2021, with over 122 million additional takeaway trips compared to 2019.

Scotland

35%

of out of home trips through **takeaway**

vs. 22% in 2020

vs. 11% in 2019

+122m

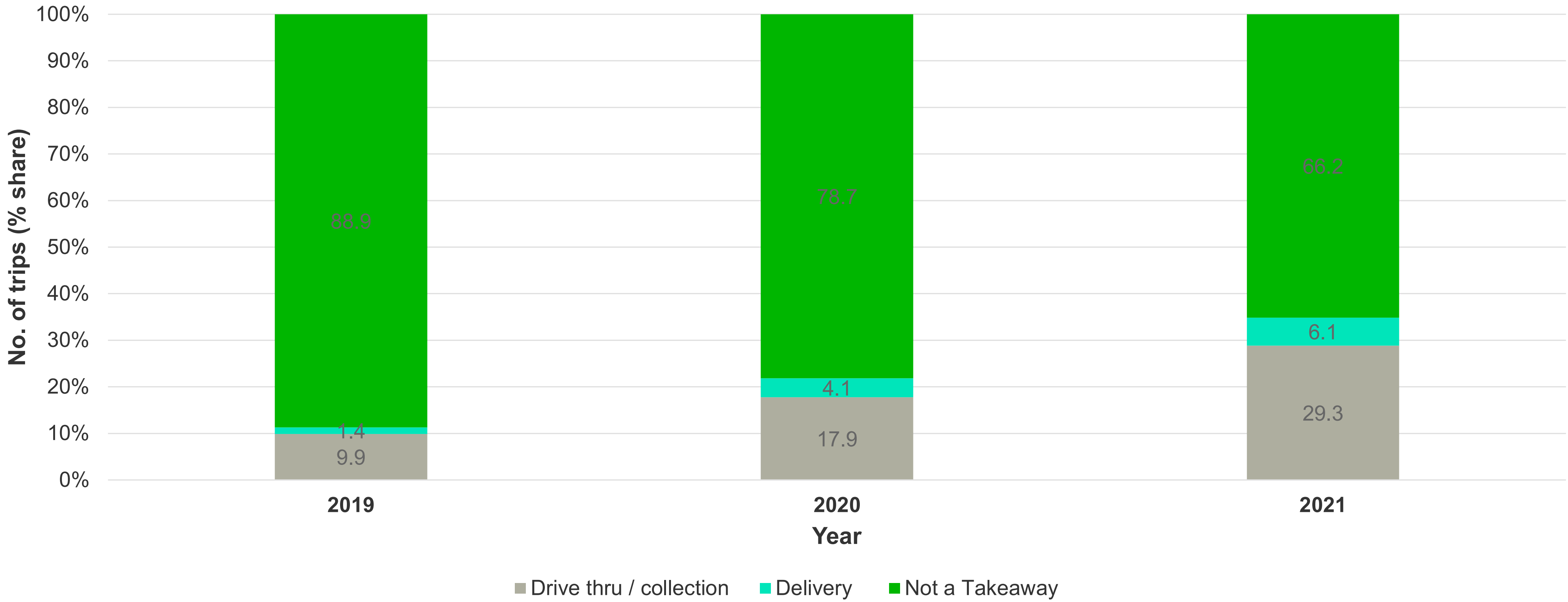
Takeaway trips in 2021 vs. 2019

(+101m vs. 2020)

The percentage share of out of home trips that were takeaways (drive thru/collection & deliveries combined) has more than tripled from 2019 to 2021.

Scotland

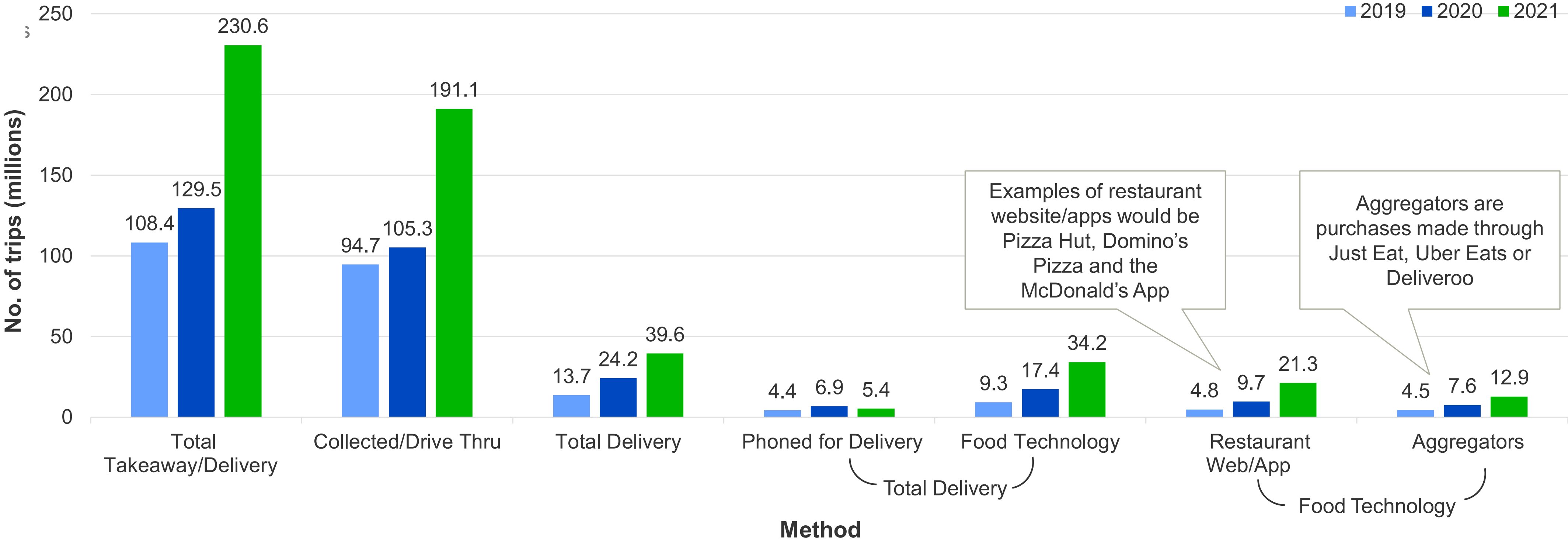
Total takeaway & delivery – No. of trips (% share) by year



The number of trips involving collection/drive thru has more than doubled in 2021 compared to 2019. Food technology such as restaurant web apps and aggregators have played a key role in the growth of delivery.

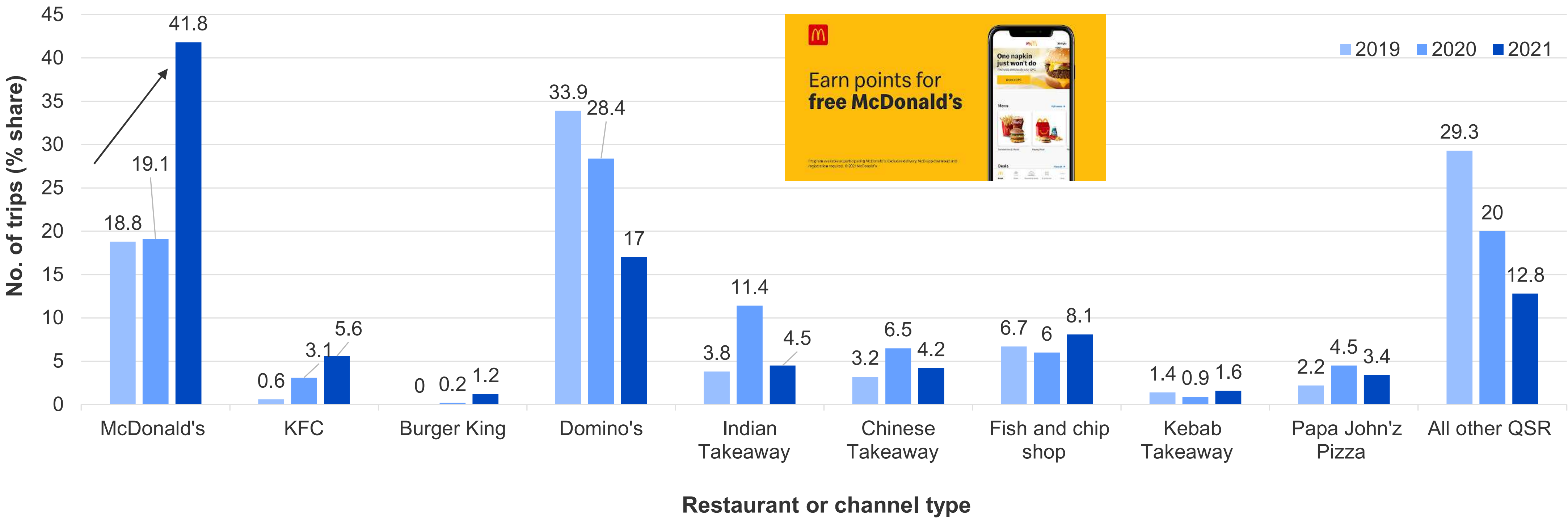
Scotland

Total takeaway & delivery – No. of trips (millions) by year for method



For quick service restaurants (QSRs), McDonald’s have more than doubled their share of out of home trips involving website and app use, whilst Domino’s share has reduced in 2021 compared to 2019.

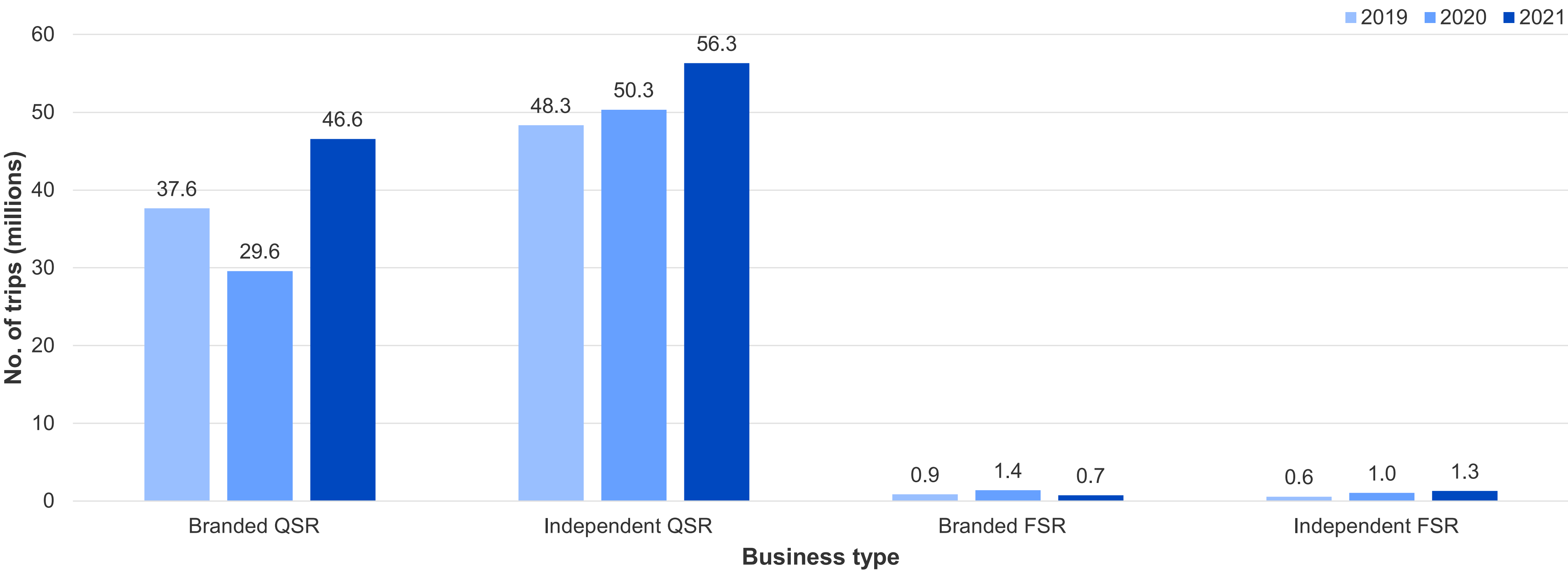
Restaurant website / App use (QSRs) – No. of trips (% share) by year for restaurant or channel type



Both branded and independent quick service restaurants (QSRs) have seen overall growth for takeaways (including deliveries) over the past three years.

Scotland

Total takeaway & delivery – No. of trips (millions) by year by business type



KANTAR

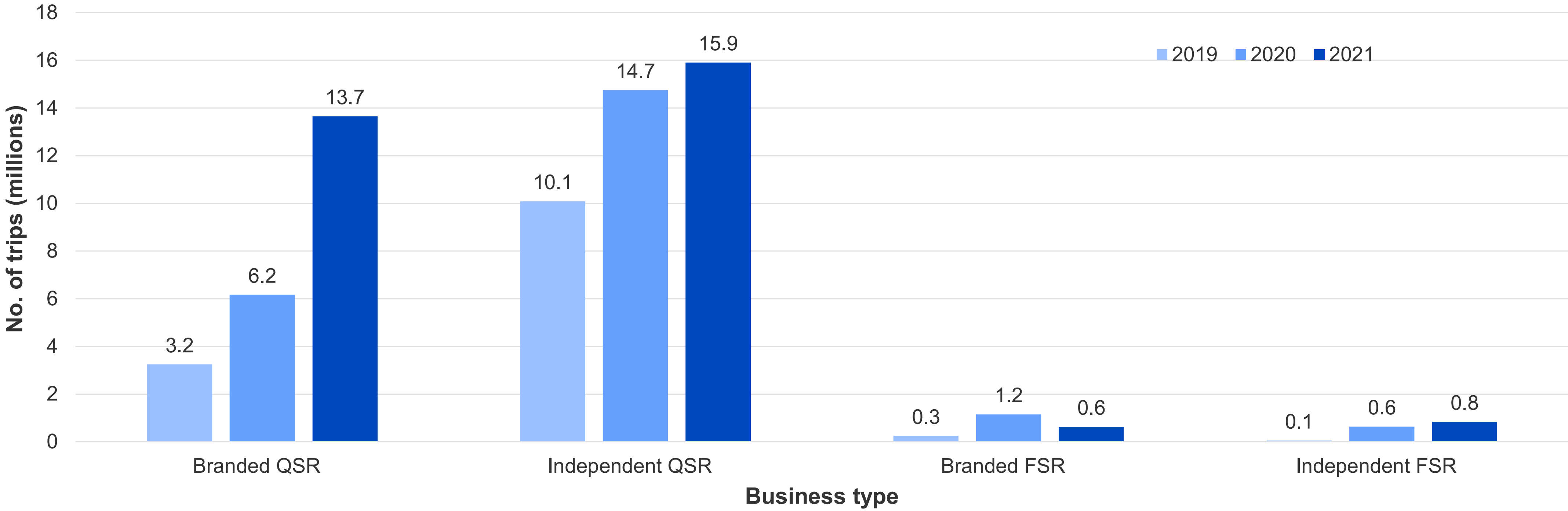
Kantar Out of Home | QSR Takeaway | Trips | Scotland | 52 w/e 26 Dec 2021 vs 2020 & 2019

Note FSR = full service restaurant

For delivery alone, both branded and independent quick service restaurants (QSRs) have seen growth over the three years, with an additional 10 million trips in 2021 compared to 2019 for branded QSRs.

Scotland

Total delivery – No. of trips (millions) by year for QSRs & FSRs



Kantar Out of Home | QSR Delivery | Trips | Scotland | 52 w/e 26 Dec 2021 vs 2020 & 2019

Note FSR = full service restaurant

At the start of 2021, there was a huge increase in delivery trips compared to 2019, likely as a result of the second lockdown.

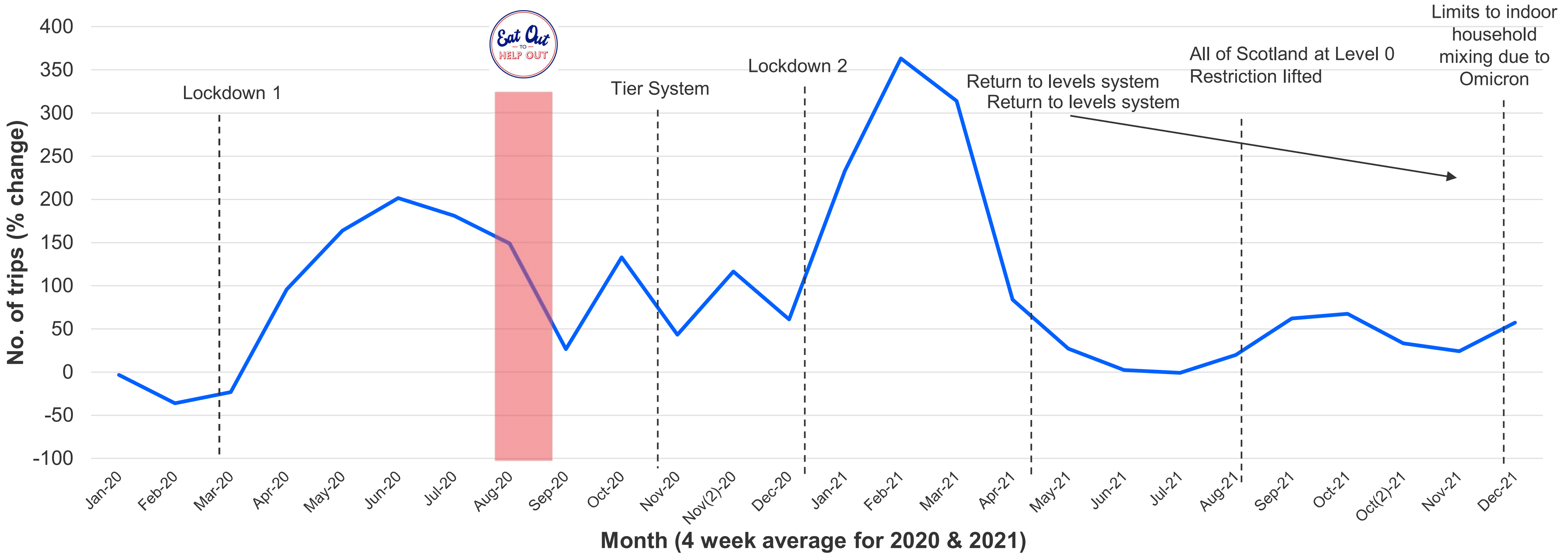
Scotland

Spend gained from delivery since restrictions were lifted vs 2020

Takeaway: £96m

Dine In: £107m

Total delivery – No. of trips (% change) for 2019 vs. 2020/21



KANTAR

Kantar Out of Home | Total Delivery | 4 w/e 26th Dec 21 | Switching: 28 w/e 26 Dec 2021 vs 2020

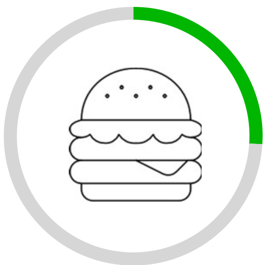
Note two months included for November 2020 as covers 4 w/e 1 Nov and 29 Nov, and October 2021 as covers 4 w/e 3 Oct and 31 Oct

In 2021, burgers and chicken meals dominated the cuisine types for takeaway and delivery, with burgers growing their share by 10.3 ppts in 2021 compared to 2019.

Scotland

Total takeaway including delivery - No. of trips (% share) for 2021 (top 5 cuisine types)

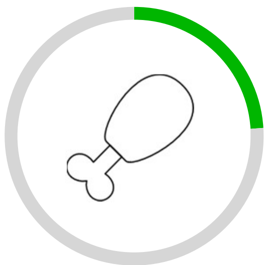
Burgers



26%

+10.3ppt

Chicken meals



24%

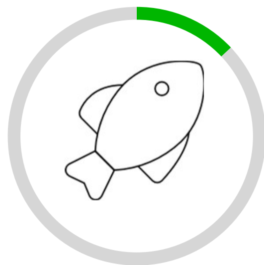
No change

Chinese

16%

+0.9ppt

Fish



13%

+0.7ppt

Pizza

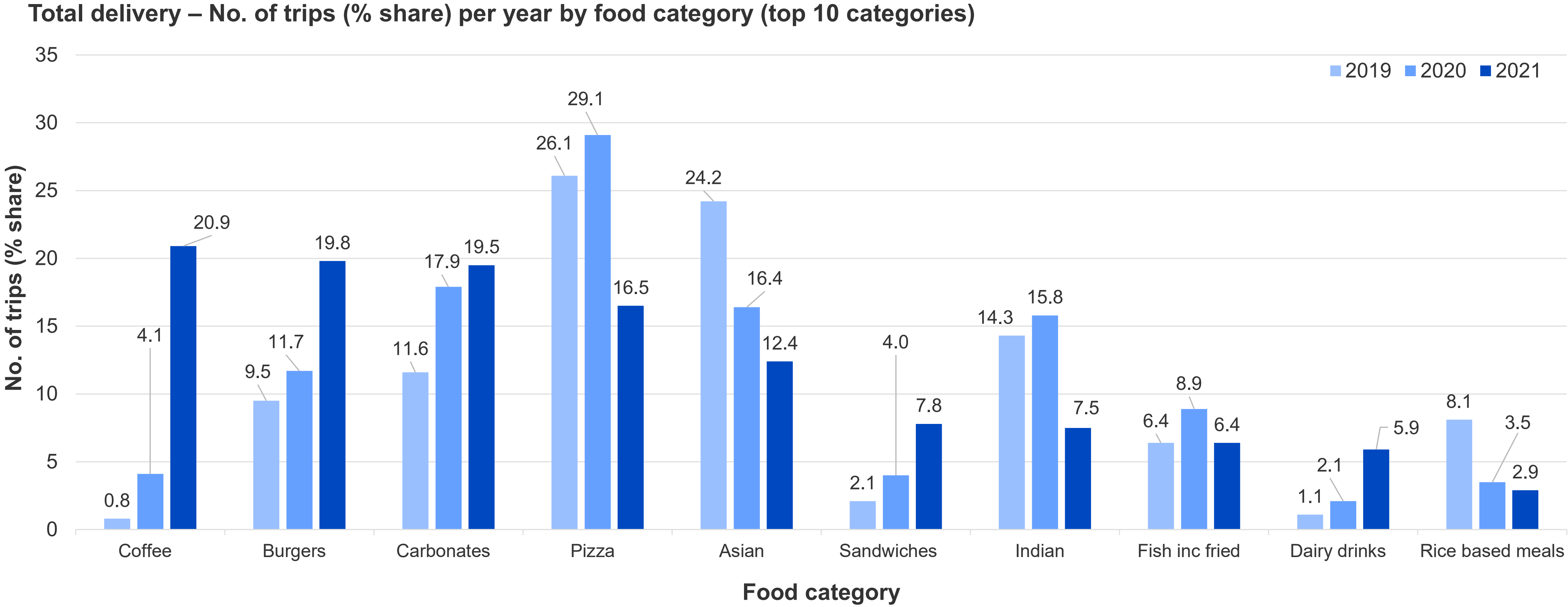
12%

+0.3ppt

PPT change 2021 vs 2019

For food delivery, coffee, burgers and carbonates have increased share over the three years, while pizza, Asian & Indian foods have declined.

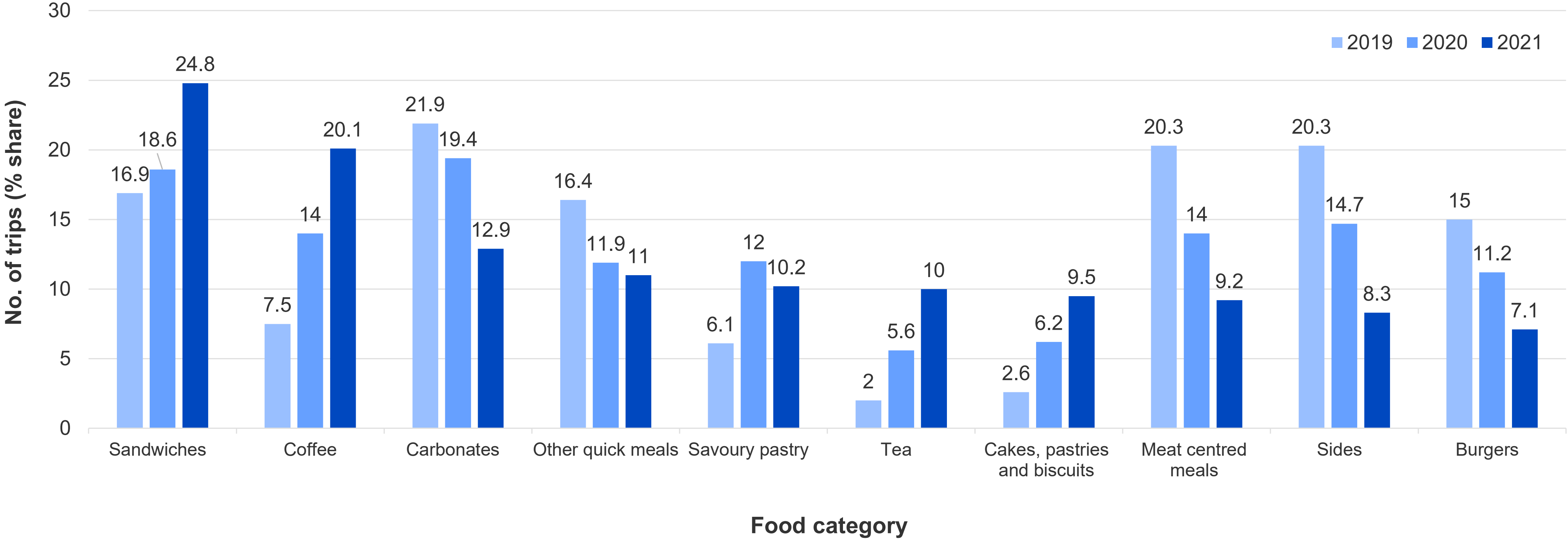
Scotland



Scotland

For food collection and drive thru, sandwiches and coffee have seen an increase in share growth over the three years, while carbonates, meat centred meals and burgers have declined.

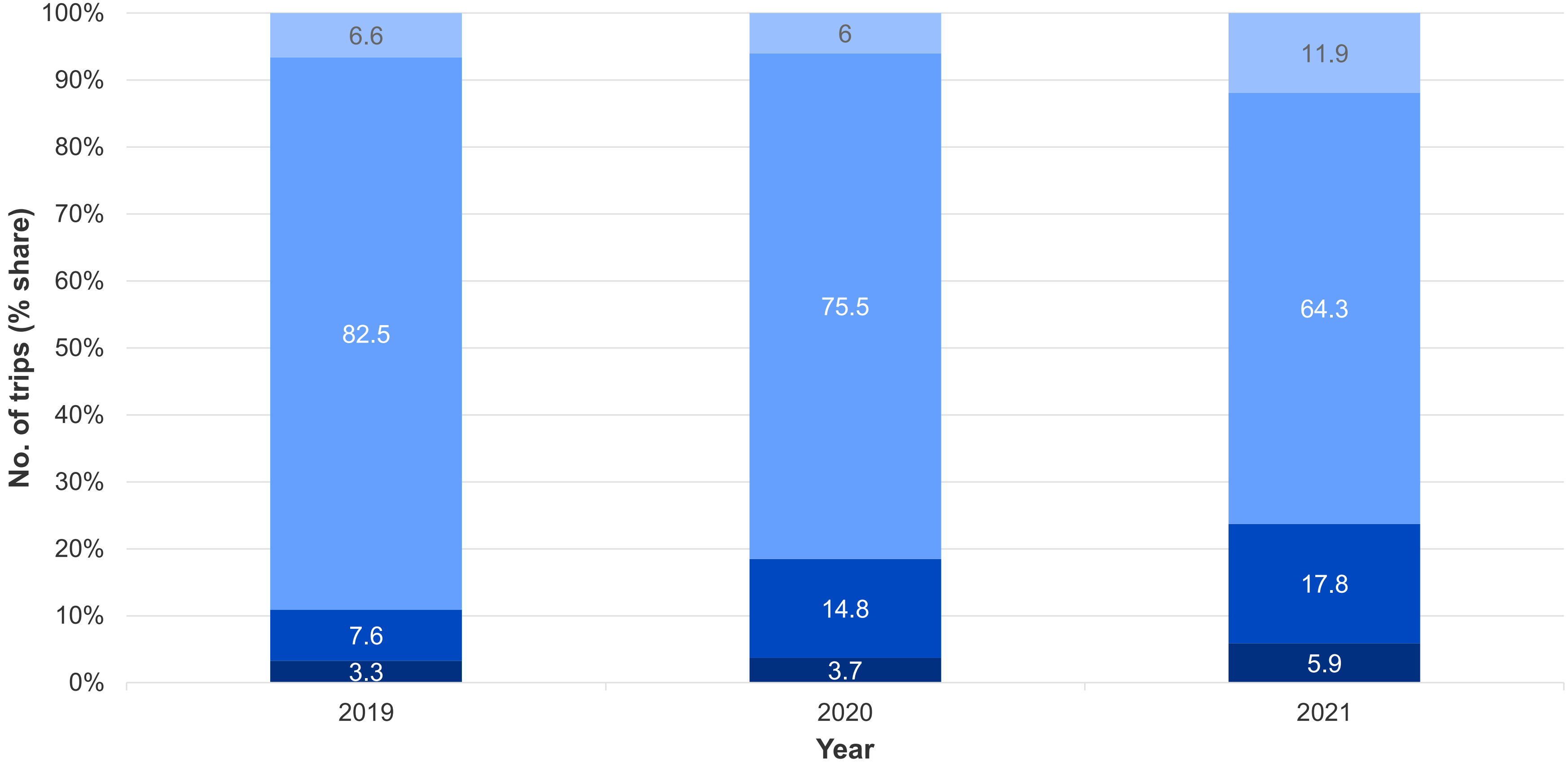
Total collection / drive thru – No. of trips (% share) per year by food category (top 10 categories)



At GB level, we have seen an increase in the proportion of breakfast, lunch and snacking trips being delivered, over the last three years.

GB

Total delivery for GB – No. of trips (% share) per year by meal occasion



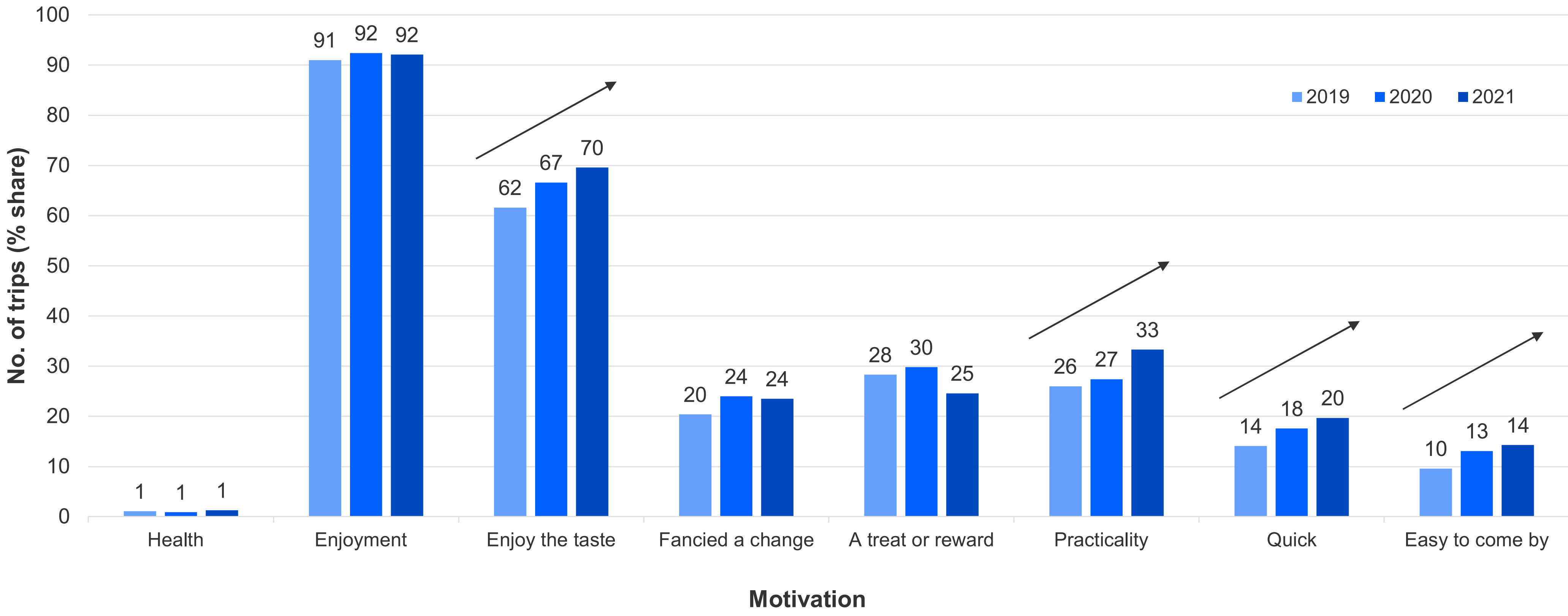
All meal consumption meal occasions are panellist defined:

- Snacking occasions
- Evening meal/teatime
- Lunch
- Breakfast

At GB level, enjoyment of the taste, practicality, quickness, and ease have become more important for delivery trips over the three years.

GB

Total delivery for GB - No. of trips (% share) per year by motivation



Takeaway and delivery – Summary

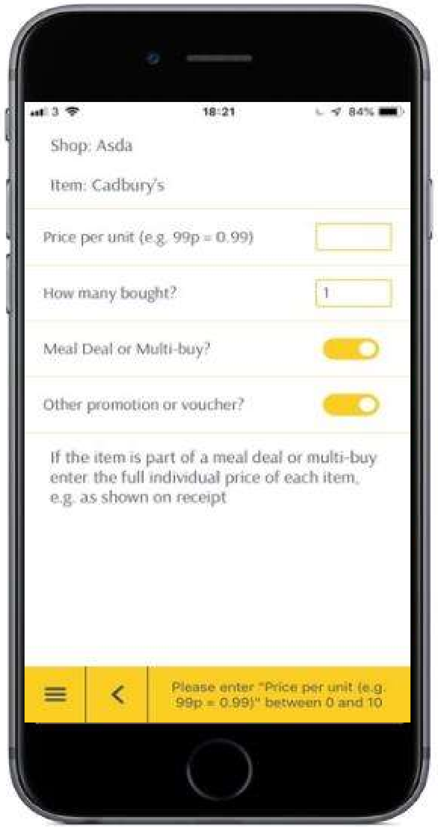
- The takeaway and delivery market has seen strong growth over the pandemic years in Scotland, with an increase in value of over 88% in 2021 compared to 2019.
- However, the average spend per delivery trip has declined in 2021 by 18% compared to 2020.
- In 2021, food technology such as restaurant web apps and aggregators played a key role in the growth of delivery, with an increase of 16.5 million trips since 2019.
- Over a quarter of takeaway and delivery trips featured burgers in 2021, an increase of 10.3 ppts since 2019.
- For delivery, coffee has increased its share of the market by 20% and burgers by 10% in 2021 compared to 2019.

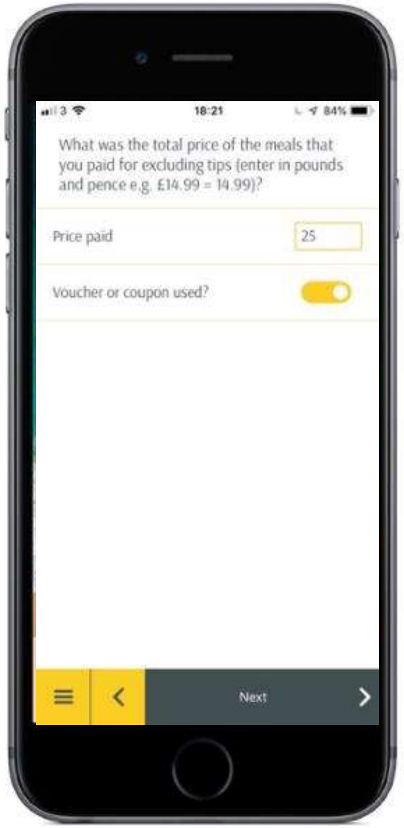
6
Promotions

When answering questions on out of home, panellists select whether they used a meal deal or multi buy in retail outlets or voucher/coupon in food service (referred to as promotions).

Asked in the following channels:

- Supermarkets
- Bakery & sandwiches
- Cafes/coffee shops
- Discount chains
- Garage and forecourts
- Travel outlets
- Leisure outlets
- Vending machines
- Workplace (snacks and drinks only)





Asked when buying main meals, in the following food services:

- Fast food outlets
- Workplace canteen (main meal only)
- Hotels
- Pubs & bars
- Restaurants

Note: As quick service restaurants have meal deals as part of their core pricing structure, we do not expect panellists to record this

Note: Out of home promotions

Information on promotions in the out of home market is less comprehensive than for take home purchases.

The use of promotions is entirely consumer defined - panellists declare if they perceive that they have used a promotion, but, it is understood that consumers perceive promotions in different ways.

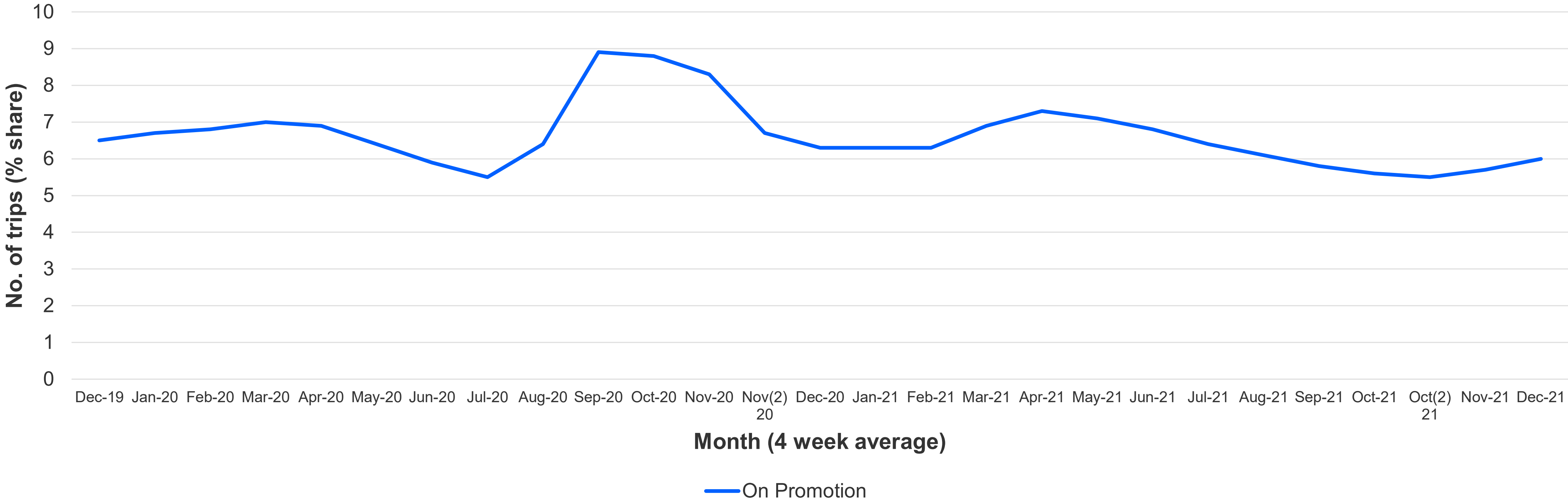
Where there is a regular discount for buying specific items as a group, or a food service outlet is constantly offering a promotion or discount and the discount is automatically applied, while some consumers will record this as a promotion, many consumers are less likely to acknowledge and record that a promotion has been used.

Specifically in quick service restaurants, Kantar identifies promotions as any purchase made where a voucher or coupon was used to reduce the price of the meal. Meal deals which are a permanent pricing structure generally covering the whole menu are unlikely to be perceived as a promotion by members of the panel.

Scotland

The proportion of trips out of home featuring a promotion saw a spike in the autumn of 2020, potentially due to the *Eat Out To Help Out* scheme, however this has since fallen to pre-pandemic levels.

Total out of home – No. of trips (% share) featuring a promotion



Scotland

In 2021, 50 million out of home trips featured a promotion, which was less than in 2020 and 2019.

7.7%

of out of home trips featured a promotion
-1.3ppt vs. 2020
-1.5ppt vs. 2019

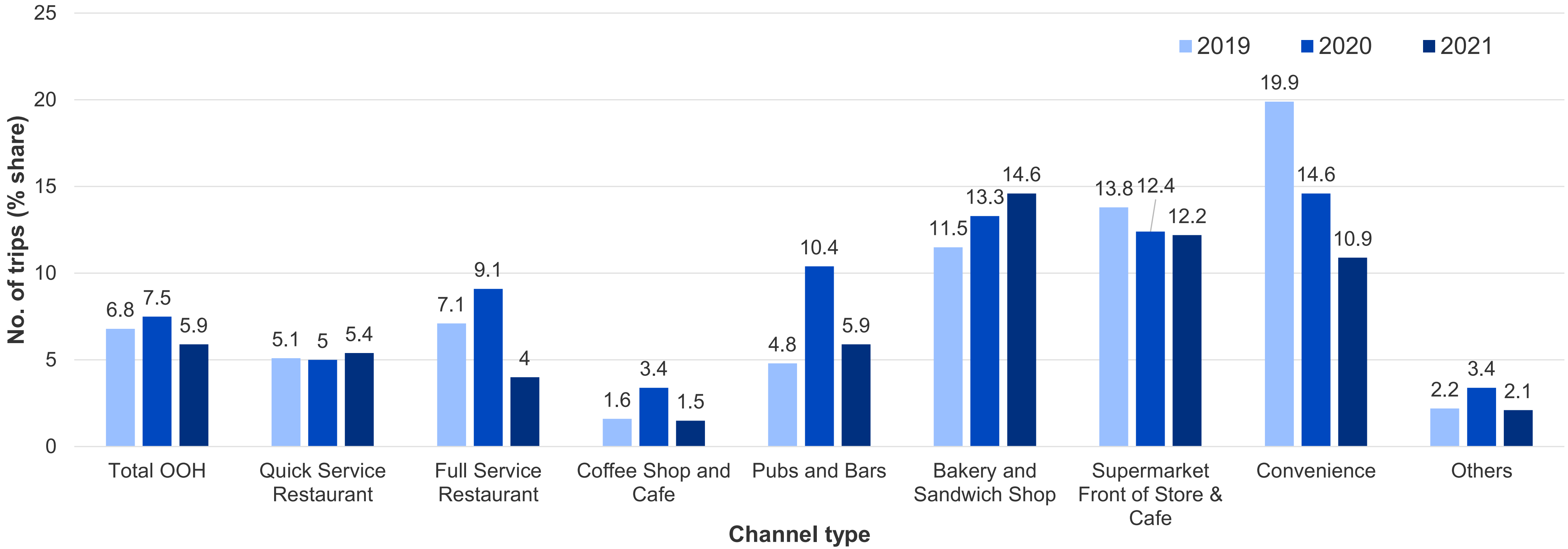
50m

of out of home trips featured a promotion
-2.7m vs. 2020
-3.5m vs. 2019

There was a decline in the share of out of home trips featuring a promotion for convenience stores and full service restaurants in 2021 vs. 2019. Bakery and sandwich shops saw the largest increase.

Scotland

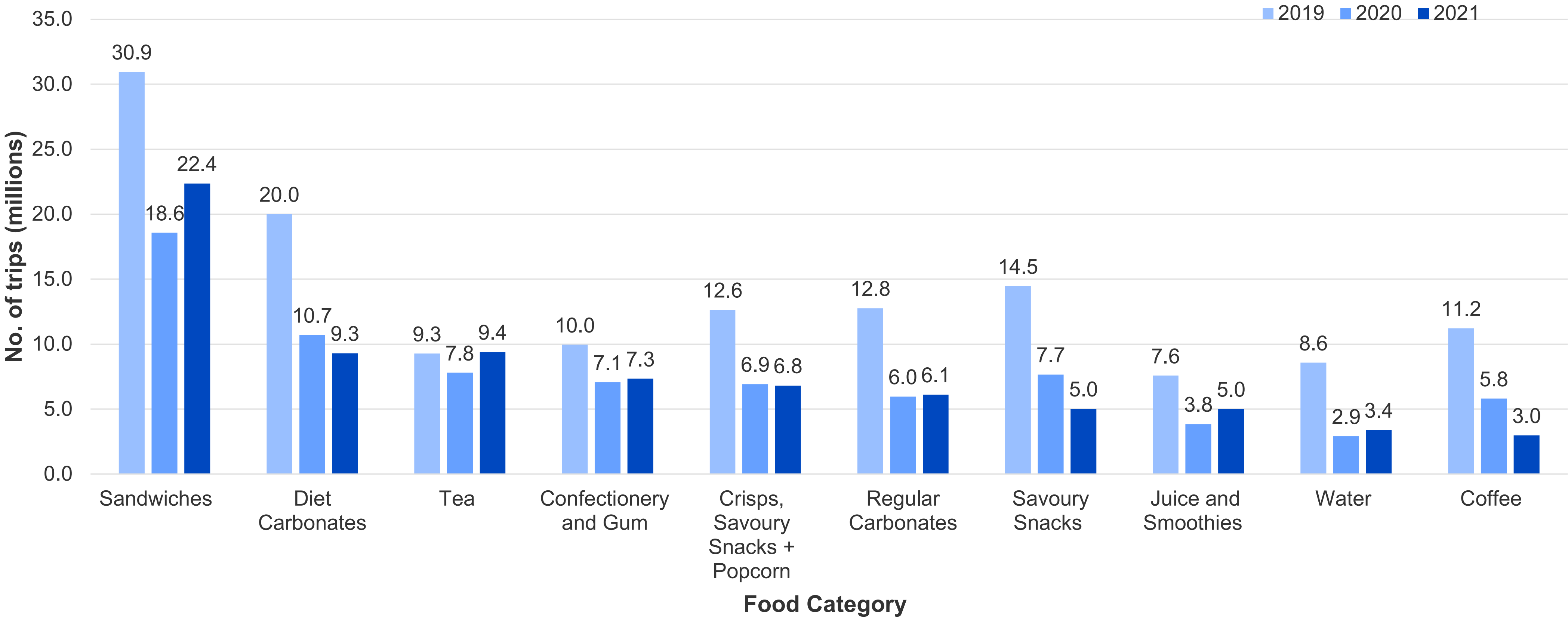
Total out of home - No. of trips (% share) per year featuring a promotion by channel type



Most categories have seen a reduction in the number of out of home trips featuring a promotion since 2019 overall, however, sandwiches and tea have seen an increase since 2020.

Scotland

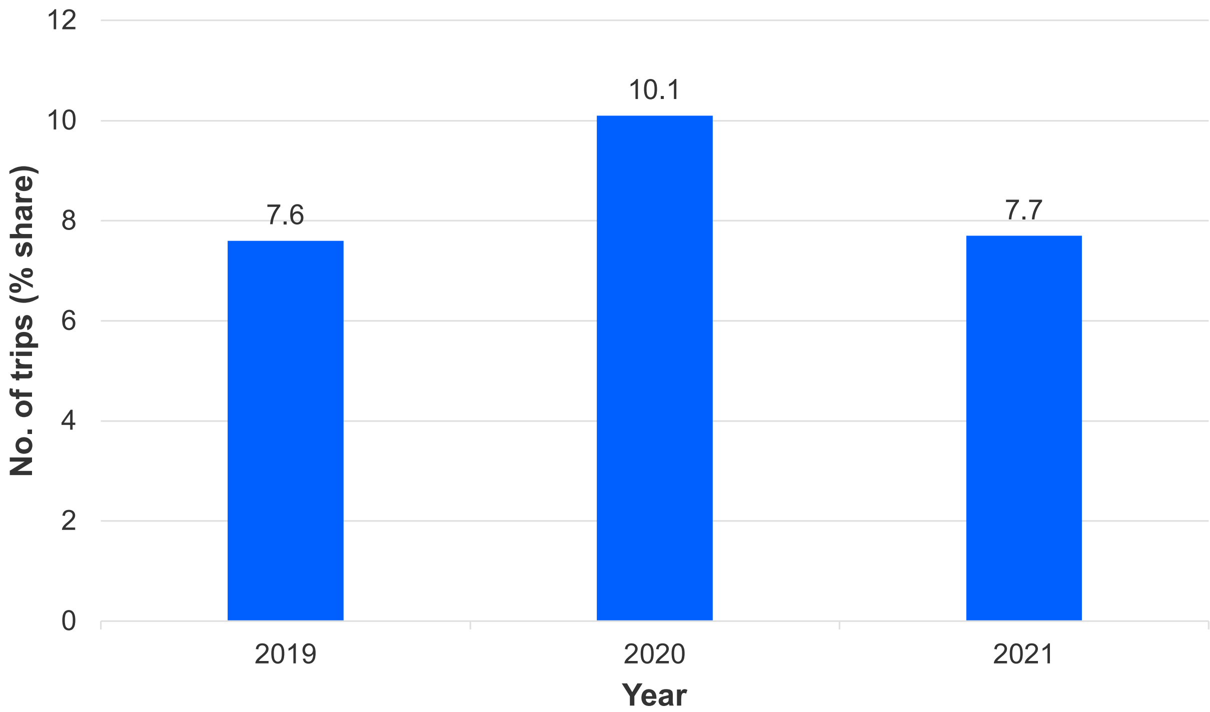
Total out of home - No. of trips (millions) per year featuring a promotion by food category (top 10 categories)

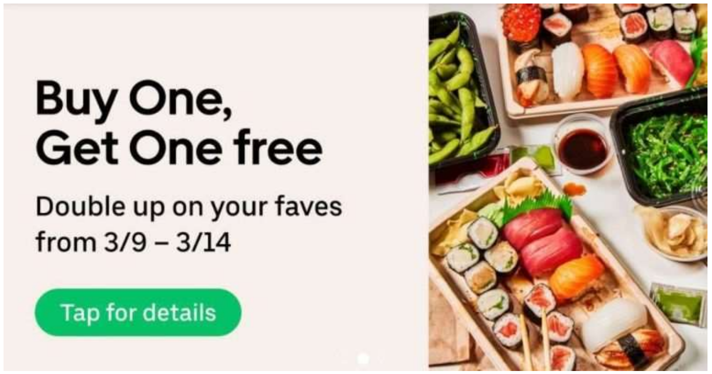


Scotland

There was a higher share of out of home delivery trips featuring a promotion using aggregators during 2020 compared to the other years, but this has since begun to return to pre-pandemic levels.

Total delivery aggregators – No of trips (% share) per year featuring a promotion





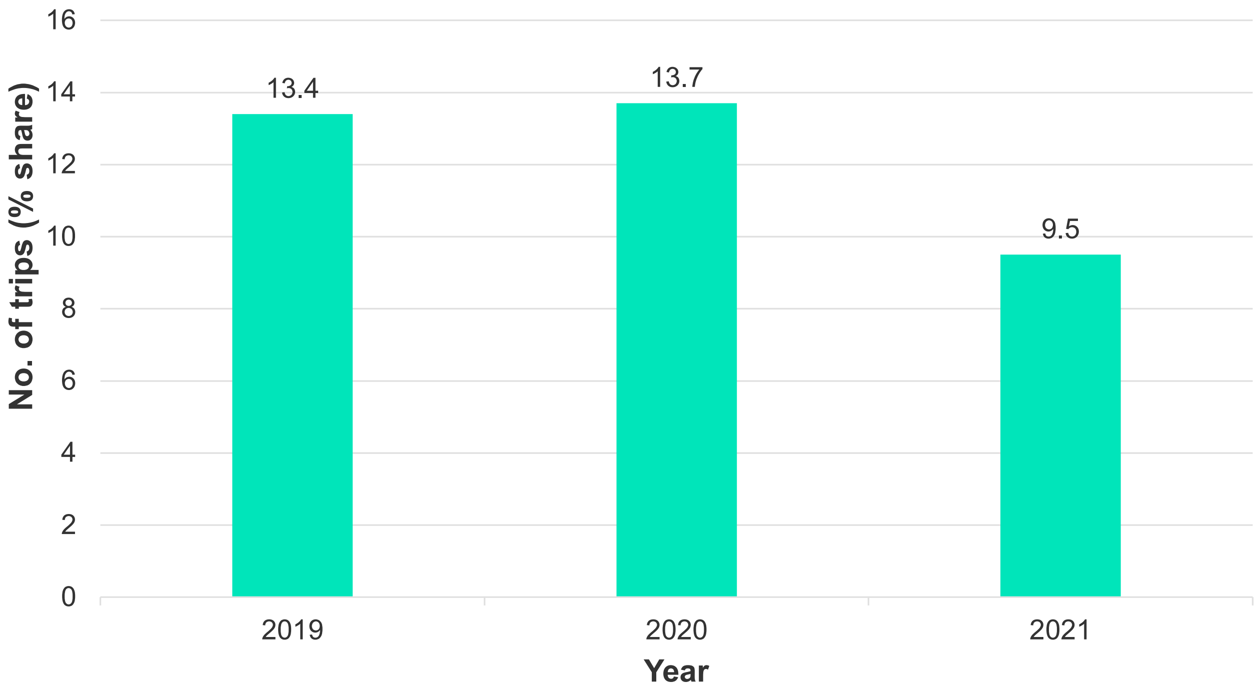
Kantar Worldpanel OOH Panel | Trips (% share on promotion) | Aggregator delivery | 52 w/e Dec 21 vs Previous Years

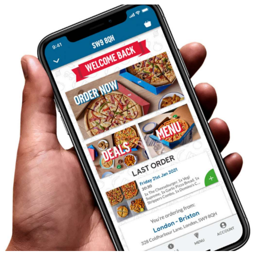
Scotland

The share of out of home trips featuring a promotion for restaurant website / apps saw a very small uplift in 2020, however this has since fallen to its lowest share in the last three years.

'Promotions' are calculated based on the discretion of the panellist. Certain deals may be seen as a change to pricing structure and as a result may be seen as a change to pricing structure and as a result may be classified as 'not a promotion'.

Total delivery restaurant website / app – No. of trips (% share) by year featuring a promotion





Promotions – Summary

- In 2021, 50 million OOH trips featured a promotion, which was less than in 2020 and 2019.
- Level of promotional usage has declined since 2019 for a number of OOH channels, including full service restaurants and convenience stores.
- The *Eat Out to Help Out* scheme in autumn 2020 resulted in an increase in promotional activity, but it has since fallen back to pre-pandemic levels.
- Sandwiches and carbonated drinks account for the top two foods that featured a promotion in 2021.

Overall summary

OOH market

Throughout 2021 the OOH market declined compared to 2019, particularly during times of lockdown.

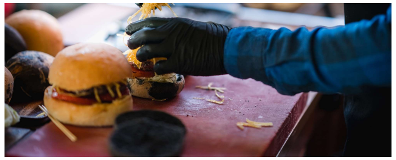
Quick service restaurants were the only channel to see growth in 2021 versus 2019, likely due to their ability to pivot to delivery and takeaway.

Consumers

Consumers aged 35-54 experienced the largest reduction in average number of trips OOH in 2021 vs. 2019, whilst those aged 55 and over had the smallest reduction.

Consumers from social class group C2DE visited quick service restaurants more frequently than social class group ABC1 in 2021.

Consumption



All food and drink categories experienced a reduction in trips in 2021 compared to 2019.

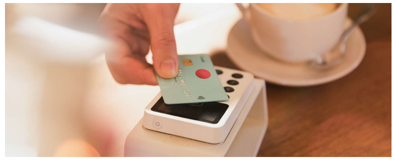
Savoury snacks were the most impacted while main meals the least impacted.

Takeaway

The takeaway and delivery market has seen strong growth over the pandemic years in Scotland.

Food technology such as restaurant web apps and aggregators played a key role in the growth of delivery.

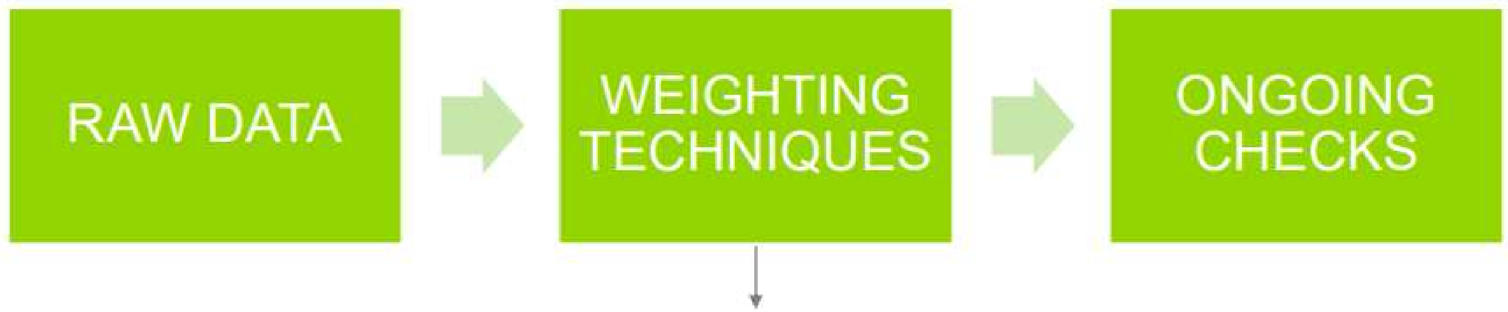
Promotions



Level of promotional usage has declined since 2019 for a number of OOH channels, including full service restaurants and convenience stores.

7
Appendix

Appendix



How do we build our data?

We take our over 1.25 million raw data purchases each year and apply a range of proprietary weighting processes to represent the desired population. These include: shop weights, panellist weights, product weights, all utilising the Kantar Worldpanel experience

Outlet channels

Total out of home										
Quick Service Restaurants (QSR)	Full Service Restaurants (FSR)	Pubs & Bars	Café & coffee shop	Bakery & Sandwich outlets	Supermarket Cafes & Front of Store	Convenience	Others			
QSR Burger	FS Burger	Large branded pubs	Large branded coffee shops	Large branded bakery	Main Supermarket Front of Store	Supermarket Convenience	Leisure & Hotels		Workplace & Education	Travel & Vending
QSR Chicken	FS Italian	Small & Independents pubs	Independents cafes	Small & Independent bakery	Supermarket Cafes	High Street Convenience	Leisure	Hotels		Supermarket forecourts
QSR Pizza	FS Chicken		Garden centre cafes			Symbols & Independents	Tourist attraction			Forecourts & garages (eg motorway services)
QSR Ethnic	FS Ethnic		Department store centre cafes				Leisure outlets (e.g. cinema, bowling alley)			Travel outlets
QSR Fish & Chip	FS Other						Market Stall			Vending machines
QSR Other							Sports venues			

KANTAR

Food and drink categories and subcategories

Drinks	Hot Drinks	Total Coffee
		Total Tea
		Hot Chocolate
		Other Hot Drinks
	Cold Drinks	Total Carbonates
		Total Juice and Smoothies
		Total Dairy Drinks
		Total Water
		Total Cold Coffee and Tea
		Total Energy and Sports
		Other Cold Drinks

Snacks	Savoury Snacks	Total Savoury Snacks
		Crisps, Snacks, Nuts & Popcorn
		Other Savoury Snacks
	Sweet Snacks	Cakes, Pastries and Biscuits
		Confectionery and Gum
		Fruit Pots and Dried Fruit
		Ice Cream
		Yoghurt
		Other Sweet

Meals	Quick Meals	Sandwiches Total
		Salads Total
		Savoury Pastry
		Sushi Total
		Other Quick Meals (e.g. Baked potato)
	Main Meals	Breakfast
		Indian Meals
		Chinese, Thai and other Asian Meals
		Pizza
		Pasta
		Burgers
		Fish inc fried
		Kebab
		Meat Centred Meals
		Rice based meals
		Sides
		Vegetarian Centred Meals
		Other Meals