# Monitoring Retail Purchase and Price Promotions in Scotland in 2021

## Introduction

This briefing summarises patterns of retail purchase and price promotions in Scotland in 2021. The results have been compared with information on reported behaviours in 2019 and during 2021. Detailed data on social class is also presented for 2021. This data was provided by Kantar, a market research company who collect information on the groceries we purchase from retailers and bring into the home.

The data refers to all food and drink purchased for use **within** the home, it does not include any food or drink purchased for consumption outside the home, or takeaways.

## Key Findings

- In 2021, the volume of total food and drink purchased into the home increase by +5.9%, compared to 2019.
- Spend on total food and drink purchase into the home in 2021 was £10.4bn, an increase of +12.7%, compared to 2019.
- The number of average trips per household (including online purchases) decreased to 253 in 2021 a reduction of -8.9% compared to 2019.
- Spend on food and drink purchased online into the home was remains higher compared with 2019, an increase of +109.4%.
- The average number of online ‘trips’ per household showed an increase of +23.2% compared to 2019.
- The take home purchase of energy per person, per day increased by +6.35% (140 kcal) in 2021, compared to 2019.
- The total food and drink purchased on a price promotion decreased of -3.5 percentage points to 23% compared to 2019.
- In 2021, social class group C2DE visited supermarkets and retailers more often than those from ABC2 households, but spent on average less per trip (£14.55 vs. £16.76 respectively).
- Both ABC1 and C2DE households purchased a similar proportion of food and drink both on and off price promotion in 2021.

## Methodology

Kantar collect longitudinal information on purchases into the home from a large household consumer panel of around 30,000 households in Great Britain. Around 2,389 households in Scotland record all food and drink purchased into the home from retail shops and supermarkets.

- 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) or takeaways. This information is collected by another subset of the main purchasing panel.
- 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.
- Kantar continually improve their datasets, with regular changes/updates to both product coding and the way the data collected from sample data are weighted up to represent the total picture. Data are usually reworked back 5 years to ensure trends are not adversely affected. Therefore, there may be slight differences in the data provided for 2019-2021 in this report, compared to those previously published.

## Total food and drink

The volume of food and drink purchased remains higher than pre-pandemic levels. Between 2020 and 2021 the purchase of total food and drink declined by 2.4%. However, the volume of total food and drink purchased into the home in 2021 was 5.9% higher than 2019. When compared with 2019, spend on total food and drink also increased by 12.7% in 2021. However, the number of trips to retail shops and supermarkets declined by 18.9% during this time.

## Online food and drink

Changes to retail purchasing patterns observed during the COVID-19 pandemic have continued beyond 2020. Overall in 2021, 9.1% of total food and drink was purchased online, also representing 9.1% of overall spend on total food and drink. Purchase of total food and drink online increased by 98.5% in 2021, compared to 2019. Spend online in 2021 was £951m, representing an increase of 109.4% compared to 2019. In 2021, online ‘trips’ also increased by 23.2% to an average of 17.7 per household annually.

## Price promotions

In 2021, 23.1% of food and drink was purchased on price promotion. Between 2019 and 2021 food and drink purchased on promotion from all retailer types (except convenience/small stores) declined. A higher volume of discretionary food and drink categories continued to be purchased on price promotion in 2021, including 37.2% of take home savouries, 34.3% of take home confectionery and 31.1% of puddings and desserts.

In 2021, Temporary Price Reduction (TPR) and Y for £X remained the two greatest price promotions types, although both have seen a decline since 2019. In 2021, the volume of food and drink purchased online with a price promotion was 28.3%. All types of promotions including online declined between 2019 and 2021. In 2021, the spend per kilogram of food and drink purchased on promotion was £2.01, compared to £1.57 per kilogram of food and drink purchased without a promotion.

**Discretionary food and drink:** Items of food and drink which are high in calories and/or fats, sugar or salt, low in nutritional value, which aren't required for our health. The discretionary food and drink categories presented in this report are sweet biscuits, puddings and desserts, confectionery, crisps and savoury snacks, ice cream and edible ices, and regular soft drinks. Data for cakes and pastries was not available for this report.

## Nutrients

Table 1 below shows the purchase of calories and nutrients per person, per day increased in 2021, compared to 2019. For example, calories purchased per person, per day increased by 6.35% (140 kcal).

**Table 1. Nutrients purchased per person, per day in Scotland 2019 vs. 2021.**

| | 2019 | 2021 | 2021 vs. 2019 % Change |
|---|---|---|---|
| **Population** | 5,463,300 | 5,479,900 | +0.30 |
| **Energy** | 2,211 | 2,351 | +6.35 |
| **Protein** | 74 | 78 | +6.08 |
| **Fibre** | 19 | 20 | +6.55 |
| **Sugars** | 118 | 122 | +3.61 |
| **Fat** | 89 | 96 | +6.93 |
| **Saturates** | 35 | 37 | +6.64 |
| **Sodium*** | 2 | 2 | +4.84 |

Many discretionary categories, including take home confectionery, were top contributors to the purchase of calories, total sugars and total fat in 2021. Alcoholic drinks purchased also contributed significantly to 4.4% of the purchase of calories in 2021. Within discretionary food and drink categories, confectionery was the greatest contributor to purchase of calories, sugar and saturated fat in 2021. Regular soft drinks also contributed highly to the purchase of sugar. In 2021, almost all sweet biscuits, take home confectionery and ice cream and ice lollies were classified as HFSS products compared to 27.7% of total food and drink products.

**HFSS:** Food and drink classed as being high in fat, salt or sugar identified through the nutrient profiling model score. Food with a score of 4 or higher is classed as HFSS, drink with a score of 1 or higher is classed as HFSS.

## Social class

In 2021, social class group C2DE visited supermarkets and retailers more often than those from ABC1 households, but spent on average less per trip (£14.55 vs. £16.76 respectively). Both ABC1 and C2DE households purchased a similar proportion of food and drink on and off price promotion in 2021.

**Social Grade Classifications:**

**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

In 2021, C2DE households purchased a higher share of food and drink from discounters, whereas ABC1 households purchased more in supermarkets and online. In 2021, C2DE households purchased more calories, sugar, fat, and saturated fat and less fibre on average, compared to ABC1 households. In 2021, C2DE households purchased more dairy products, confectionery, regular soft drinks, and frozen prepared foods compared to ABC1 households. However in contrast, there were few differences in the contribution of discretionary food categories to purchase of calories between ABC1 and C2DE households.

## Summary and conclusion

The findings in this report highlight that both volume and spend of the purchase of total food and drink into the home in 2021 remained higher than pre-pandemic levels when overall purchases increased. Food and drink purchased online has seen a large increase in volume, spend and average number of ‘trips’ per household in 2021, compared to 2019.

Almost a quarter of all food and drink purchased into the home in 2021 was bought on price promotion, with TPR and Y for £X being the main price promotion types. In addition, a higher volume of discretionary food and drink categories were purchased on price promotion. The purchase of calories and nutrients per person, per day increased by 6.35% (140 kcal), compared to 2019. In addition, key discretionary categories remained top contributors to the overall purchase of calories, total sugars and total fat in 2021.

In 2021, social class group C2DE visited supermarkets and retailers more often than those from ABC1 households, but spent on average less per trip. However, both ABC1 and C2DE households purchased a similar proportion of food and drink both on and off price promotion and there were few differences in the contribution of discretionary food categories to purchase of calories between ABC1 and C2DE households in 2021.

Overall, these findings complement and add to existing evidence that monitors trends in food and drink purchasing and price promotions. This data forms part of the Food Standards Scotland dietary monitoring programme and will be used to support and policy development, and inform public health communications and consumer advice.