

WAITROSE
& PARTNERS



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HER MAJESTY THE QUEEN
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FOOD
&
DRINK
REPORT

2021-22





“WE’RE
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AND BLASTS OF
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WELCOME TO THE HOMEBODY ECONOMY

The past 19 months have transformed us into a nation of homebodies. We’ve rediscovered the fun, creativity and sense of togetherness that food brings to our households. Six in 10 of the people we surveyed told us they take greater pride in what they cook than in pre-pandemic times, while four in 10 say food is more important to them than before. More than half of us are enjoying spending time at home more than we did pre-Covid, while 49% of us plan to go out less even though the toughest lockdown restrictions are hopefully over.

So what is the Homebody Economy? Over the past 19 months, we’ve shopped, studied, worked and entertained at home rather than venturing out. This is the Homebody Economy and it’s quickly become an accepted – and popular – way of living. The majority of people we surveyed told us the pandemic has fundamentally changed their outlook: they’re more conscious of their mental and physical health, they’re enjoying life’s simple pleasures and have embraced the importance of friends and family.

But enjoying being at home isn’t the same as being anti-social. Quite the opposite, in fact. We’re unwinding with bursts of hospitality and blasts of ‘pop-up hedonism’. There is a pent-up need to reconnect with loved ones. A quarter of those surveyed plan to host more dinner parties than they did previously. These gatherings are likely to be smaller than before, but no less important: many hosts are trading up when it comes to their hosting menus. We’re also making smarter use of our outdoor spaces. One in five households invested in a new barbecue over lockdown, while one in 10 installed an outdoor bar.

Of course, the pandemic has changed how we shop too. A quarter of our respondents bought food online for the first time this year, while the number of people shopping every day of the week has doubled in a year. We’ve adapted accordingly, increasing capacity on [waitrose.com](https://www.waitrose.com) from 50,000 orders a week to up to 300,000. We’ve also ramped up our partnership with on-demand grocery delivery app Deliveroo, with some interesting results (see pages 18-19). But our stores still remain crucial. In fact, they’ve become ‘one-stop shops’,

with John Lewis products becoming increasingly available in Waitrose stores. For example, we’ve extended the price-conscious ANYDAY range of homeware in our branches, meaning you can pick up cooking equipment along with your dinner. And our Click & Collect service adds convenience and flexibility. Half of those we spoke to tell us they plan to shop in physical stores more often now that restrictions have eased.

TikTok and Instagram continue to be dizzying treasure troves of innovation, expression and joy when it comes to food and home cooking. Three-quarters of all 18- 24-year-olds we surveyed told us they’ve been looking at TikTok or Instagram for food inspiration over the past year. It’s made the food world a wonderfully intimate place, for example, a food trend might take off in South Korea and within a day, half a million people over here are asking our in-store Waitrose Partners: “What’s this ingredient?” TikTok food crazes have driven some fascinating sales trends too (see pages 16-17).

Sustainability has crept even further up people’s agendas, particularly when it comes to food waste and packaging. The United Nations Climate Change Conference (COP26) will soon shine a light on the environmental agenda, and our goal at Waitrose is to prove that you can make good food in a sustainable and carbon-neutral way. Nothing is more important to us. I believe this will remain the core issue for our industry for the next decade and beyond.

As these shifts in our lives happened, we responded and evolved, continuing to place a strong emphasis on quality, freshness, taste and great service. But no industry stands still, and we will continue to change. I am humbled by the way our Partners and suppliers have risen to the challenges of the pandemic. Their efforts have been Herculean.

Food today is bold, inventive and fun. When shoppers visit Waitrose – either in store or online – I want them to feel enthused and intrigued. I want them to be excited by what they’ve seen. And I want them to leave feeling inspired, appreciated... and hungry.

I hope you enjoy the *Waitrose & Partners Food & Drink Report 2021-2022*.

JAMES BAILEY
Partner & Executive Director

THE FACTS & FIGURES

Waitrose carried out extensive research into the top food and drink trends. We conducted OnePoll consumer research on a wide range of topics in early September with 2,000 people across the UK of all ages – not exclusively Waitrose shoppers. The research was supported by insights from our food, drink and retail experts, as well as from Waitrose shoppers. It is backed up with sales data from millions of purchases throughout the year. All sales figures are compared with the same period the previous year, unless otherwise stated.

WHICH FOOD TRENDS ARE GOING UP?

CANNED FISH

From Ortiz tuna to Cornish pilchard fillets, savvy foodies are loving canned fish. These long-life store-cupboard essentials can be used in appetisers, as a snack on toast or in a salad. And the colourful cans are works of art in themselves. It's effortless food – and perfection with a glass of chilled white wine. Sales of mackerel and anchovies rose by 17% in August 2021.

BARBECUED WATERMELON

Yup, it's a thing. Cooking watermelon over hot coals brings out its sweet flavour. The recipe is simple: drizzle slices in olive oil, grill, then – once charred – add crumbled goat's cheese, mint leaves and the juice of a grilled lime. In August, searches for our barbecued watermelon recipe rose by 65%. Visits to the grilled and barbecued fruit page of waitrose.com increased by almost 40%.



NOSTALGIC DESSERTS

From Angel Delight to sticky toffee pudding, nostalgic desserts are making a comeback. They're comforting, fun, easy and – after the 19 months we've all had – hark back to simpler times. Particularly popular are school dinner-style traybake sponges. A video for school dinner cake, complete with white icing and hundreds and thousands, has been viewed 167,000 times on TikTok, while searches for knickerbocker glory recipes on waitrose.com are up 171% this year.



MAPLE SYRUP

This 100% natural syrup has traditionally been associated with breakfast as a topping for pancakes, waffles or porridge. But maple syrup is gaining popularity in savoury dishes too, whether it's giving a flavour twist to sausages, providing the foundation for a barbecue marinade or acting as a glaze on fish or aubergine dishes. We don't see this trend going anywhere and Waitrose has seen sales go up 9% in the past 12 months.

FOOD FROM THE LEVANT

Customers love the vibrancy and flavours of the Levant, and we have launched dozens of products under our Levantine Table range. From pomegranate molasses to Turkish Urfa chilli flakes, and from flatbreads to feta parcels, people adore eastern Mediterranean food. Searches for 'Levantine' on waitrose.com rose by 2,533% the day after the range launched.

SUSHI

The delayed Tokyo Olympics led to a 54% rise in sushi sales as the nation indulged in a spot of themed cuisine. Sales of sushi mats were up 57% and nori sales were up 56%, compared with the same period last year, as customers have embraced Japanese cuisine and tried their hand at homemade feasts.

5:2 VEG DIET

Five days veggie, two days treating ourselves to meat. It's no surprise that vegetarianism and veganism continue to dominate menus, and many of us are looking to reduce the number of days we eat meat during the week. Six months after completing the one-month Veganuary challenge, recent research by the organisation revealed that 82% of participants maintained a dramatic reduction in their animal product consumption. Our vegan range, Plantlife, has seen sales up 21% compared to last year, with the best sellers including No Duck Spring Rolls and No Chorizo Tortelloni.



FRIENDSMAS

Having multiple Christmas lunches, dinners or celebrations with friends is becoming increasingly popular. The appeal of small but opulent festive banqueting, before or after 25 December, is set to grow. And why not? It makes sense to stretch the season of goodwill for as long as possible. We know that people are having 'second Christmases' with their pals because #Friendsmas has amassed 16.2 million views on TikTok.

GETTING SPICY

Cooking with spice continues to grow in popularity, thanks to the success of cookbooks such as *Flavour* by Yotam Ottolenghi and *My Korea* by Hooni Kim. Shoppers are finding that marinating or seasoning food is a simple and tasty way to prepare meals, whether they're using traditional spices such as garam masala and cardamom, South East Asian flavours like gochujang or American barbecue rubs. Every meal becomes an adventure. Sales of herbs and spices are up by 41% this year, having had a strong 2020 too. Middle Eastern spices (see Food from the Levant trend) and speciality salts are top performers.

YUM YUMS

Soft doughnut fingers finished with a sweet glaze. What's not to love? They're even better when they're filled with passion fruit curd and topped with lemon fondant and white chocolate shards. Naughty, indulgent and delicious. Following the launch of our new yum yums, searches for yum yums on waitrose.com jumped 317% compared to 2020. Yum yum to yum yums.



WHAT DID WE TAKE OFF OUR SHOPPING LISTS?

LOVAGE

The drink, not the herb. This alcoholic cordial from Bristol is made from the lovage plant, which is known to help digestion. Phillips of Bristol Old English Alcoholic Lovage Cordial was used as a hangover cure in the past in the West Country. However, demand has sadly fallen and the product has been delisted.



IRONING WATER

It seems that 2021 was the year of crumpled clothes. Ironing aids such as starch and ironing water fell by one-fifth as households simply went without and casual loungewear sales at John Lewis grew 195%.

TIGHTS

Working from home and less need to smarten-up for the office meant more time spent in loungewear and pyjamas. Waitrose saw sales of tights fall 31% in 2021 compared to February-October 2019.

SANDWICHES ON THE GO

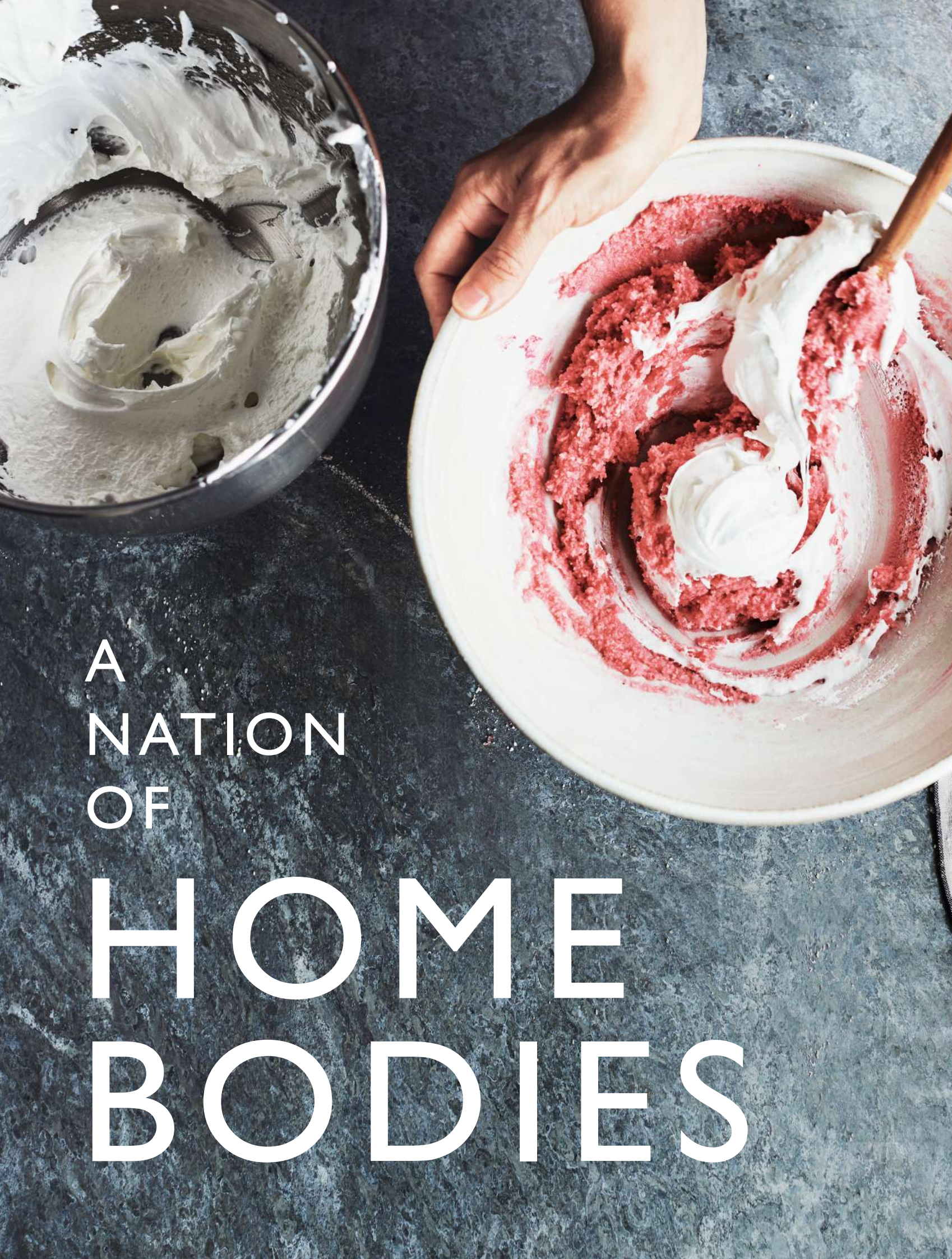
Between January and March this year, sales of food to go – such as pre-packaged sandwiches – fell by nearly half. The reason was simple: lockdown prevented people from going anywhere. However, as restrictions eased, sandwich sales have bounced back, doubling between April and July. Our bestseller continues to be prawn mayo – who knew?



READY-MADE SAUCES

Who needs jars when you can do it yourself? Lockdown taught people that cooking their own sauces from scratch was quick and easy. We saw a 37% fall in sales of ready-made sauces between January and August this year, compared with last year's panic buying.

*Survey sent by Veganuary to 65% of the 582,000 people who signed-up during the 2021 campaign. 8,690 people responded.



A NATION OF HOME BODIES

TREND ONE

The post-pandemic economy will be a Homebody Economy, our research finds. The past year has made us fall back in love with our homes.

Some 53% of the people we surveyed said they enjoy spending time at home more than they used to. Meanwhile, half of our respondents plan to go out less in the evenings, even though the days of lockdowns are hopefully behind us. And when people are venturing out to see friends or go to the pub, just under half say they're coming home earlier than they used to. People aged 18-34 are the group most likely to stay in more, in a sign that the Homebody Economy isn't confined to the older generations. In fact, only 20% of all the people we surveyed expressed an increased desire to go out and party post-Covid.

So what's behind this desire to stay at home? It's partly the result of a tricky 19 months. A total of 60% of respondents said the pandemic caused them to reassess their outlook on life. Half of all the people we spoke to said they're more aware of their mental and physical health. A similar number said they're more wary of the world in general, and some are worried about the economy. But we are also appreciating the simple things in life more than ever. And one of these is food.

We have rediscovered the joy of cooking. Just under 60% of those we spoke to are taking greater pride in how their meals taste, while 41% say food is more important to them than it was pre-pandemic. The same proportion of respondents – 41% – say lockdown has made them more adventurous cooks.

John Lewis saw record sales in cookware over the year, up by 23%. Perhaps due to international travel restrictions, half are indulging their culinary curiosity by experimenting with 'global dishes' such as paella and curry. At Waitrose Cookery School, the most popular in-person courses have been Bao Cookery Class, Chicken Ruby Murray With Naan and Shawarma Feast, while across our virtual Cookery School classes, Taste of Italy,

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Curry Night and Make Bibimbap At Home have seen the most demand.

Meanwhile, 36% of our respondents have introduced a 'home happy hour' for household sundowner drinks and July saw significant demand for apéritifs, with sales of Pampelle Apéritif up by 4,850% compared with 2020.

In short, food and drink have become more central to our lives. People are enjoying the rituals associated with eating and drinking. There's also a greater awareness of the provenance of the food on our tables. Of the people we asked, 47% said they have more of an appreciation for local produce than they did before.

“People have rediscovered some of the joy and the fun and the connectivity that food in the home brings. I think a lot of that will stick,” says James Bailey.

The Homebody Economy looks like it's here to stay: of the people we polled, 37% did not think they'll be heading back to work full time. Meanwhile, even when international travel restrictions are lifted, 53% of consumers told us they plan to holiday in the UK more than they used to.

41% **53%**

of us agree food is more important to them than it was pre-pandemic

of us enjoy spending time at home more than they used to

ALTHOUGH LOCKDOWN IS OVER, I PLAN TO GO OUT LESS

58% of 18- 34-year-olds agree
49% of 35- 44-year-olds agree
46% of 45- 54-year-olds agree
45% of over-55s agree

RETURN OF THE DINNER PARTY

We were a pretty sociable nation anyway. But a quarter of all respondents plan to host more dinner parties post-pandemic than they did pre-pandemic, as they make up for lost time. Our survey found that the lockdowns have made us more thankful for our loved ones: some 52% of people say that the past 19 months have made them more appreciative of friends and family. Accordingly, we are punctuating life with bursts of hospitality as we reconnect with those closest to us.

But there's a new emphasis when it comes to dinner parties. Rather than focus on big blow-outs with all our friends or relatives, we are being far more selective. A third of those surveyed said they're having smaller gatherings than before. Post-pandemic entertaining, it seems, is about quality not quantity. The same holds for the food and drink that is served. Just over a third of shoppers are spending more money on little things when they entertain – more expensive wine and better-quality ingredients.

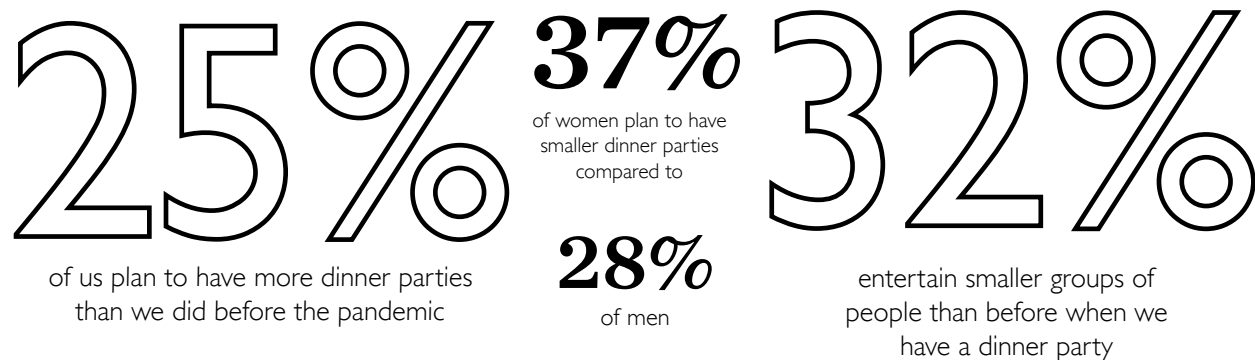
Sales of Champagne are up 40% year-on-year, while sales of magnums and bigger bottles are up 88%. It's

all about celebrating life with those closest to us. After months on end when we couldn't see anyone, we're valuing those who truly matter to us – and cherishing the time we spend with them.

“There is a lot of pent-up need to reconnect with friends and family, and a desire to socialise,” says James Bailey. “There's a little bit of a ‘seize the moment’ mentality. The feeling that life's too short.”

Our survey found that Londoners plan to re-embrace the dinner party with the most vigour, with 44% anticipating hosting more gatherings than before the pandemic. People in the North West, by contrast, are least likely to be planning more dinner parties. Meanwhile, people in Northern Ireland, Scotland, the South East, London and Wales are most likely to trade up to better ingredients.

Perhaps in anticipation of all the entertaining they're planning, 70% of people are keeping their store cupboards and pantries well-stocked. And this isn't simply a hangover from lockdown one's panic buying – 67% of those who have been keeping their cupboards full over the past year intend to carry on in the future.



“THERE'S A LITTLE BIT OF A 'SEIZE THE MOMENT' MENTALITY. THE FEELING THAT LIFE'S TOO SHORT”

TREND THREE

We've made the most of our outdoor spaces this year, with many of us turning our gardens, patios or balconies into new entertainment areas.

Our survey found that more than a third of us have used our outdoor space more over the past year, with 37% firing up their barbecues more than they used to. As with dinner parties, we've traded up when we've entertained. In July, sales of our No.1 own-brand côte de boeuf, swordfish, and crevettes rose strongly, up by 121% in the case of crevettes. Outdoor hosting has become so popular we're now offering some of our barbecue lines all year round, including our Jerk-spiced Chicken Thigh Fillets, Buttermilk Chicken King Kebab and Tandoori Chicken Breast Kebabs.

What's equally interesting is the kit we've bought. It seems that the Homebody Economy extends to our gardens, too. A fifth of those surveyed said they've invested in a new barbecue over the past year. One in eight bought an outdoor pizza oven – sales of these rose by 195% at John Lewis – while one in 10 said they'd installed an outdoor bar. Tandoor ovens, outdoor grills and outdoor fridges were also popular.

A whopping 12% of respondents said they had invested in a hot tub over the last year. If our survey is representative of the UK as a whole, this means more than three million homes bought a hot tub over the pandemic. London was the hot tub capital of Britain, followed by Northern Ireland.

Our love of the great outdoors was not confined to our gardens. Just under 40% of us have been going on picnics more than in the past. And half of this number – 20% – plan to continue in the future. Our survey question about picnics seemed to have piqued people's interest. Some 17% of respondents said that they hadn't been going on picnics more over the last year – but plan to start now.



6% OF OVER-65s INVESTED IN A HOT TUB THIS YEAR, COMPARED TO JUST **3%** OF 45- 55-YEAR-OLDS AND **2%** OF 55- 64-YEAR-OLDS

HAVE YOU INVESTED IN ANY OF THE FOLLOWING FOR YOUR OUTDOOR SPACE OVER THE LAST YEAR?

an egg-style ceramic barbecue
10%

a hot tub
12%

a new barbecue
19%

a plancha or outdoor grill
11%

a pizza oven
12%

a bar
10%

an outdoor fridge
11%

an entire outdoor kitchen
10%

a tandoor oven
11%

THE OUTDOOR LIFE

34% OF PEOPLE HAVE BEEN USING THEIR OUTDOOR SPACE TO ENTERTAIN MORE

TREND FOUR

HOW WE SHOPPED

A quarter of our survey respondents shopped online for the first time in 2021, while the number of people buying food on a daily basis has doubled in a year. These shopping trends – increased frequency and the continued growth of online – will only accelerate in the future.

Some 23% of respondents told us they'd bought groceries over the internet for the first time this year. A further 41% said they'd shopped online, but not for the first time. Only 36% – just over a third of those we polled – said they hadn't shopped online this year.

At the same time, our survey found that 8% of people now shop for food every day of the week, either in a store or online. This is up from 4% last year. The leap is particularly stark among 18-24-year-olds. While just 3% of them shopped every day a year ago, the figure is now 27% – a nine-

fold increase. These trends go hand in hand. The rise in daily shoppers reflects a proliferation of convenient ways in which to shop – through our app or website, through our partnership with Deliveroo, or in our network of 331 shops, which are open at ever-more convenient and accessible times.

The rise in everyday shopping can also be attributed to people's lockdown-related behaviour: they like to punctuate their Working From Home day with an activity such as a trip to the shops.

Although online growth is set to continue, half of shoppers also plan to shop at a physical store more often now that restrictions have eased. This figure is particularly high among 25-34-year-olds. But there are signs of new caution creeping into our shopping habits. Almost four in 10 respondents are worried about their household finances.

27%
of 18-24-year-olds shopped every day this year

50%
plan to shop at physical stores more now that restrictions are eased

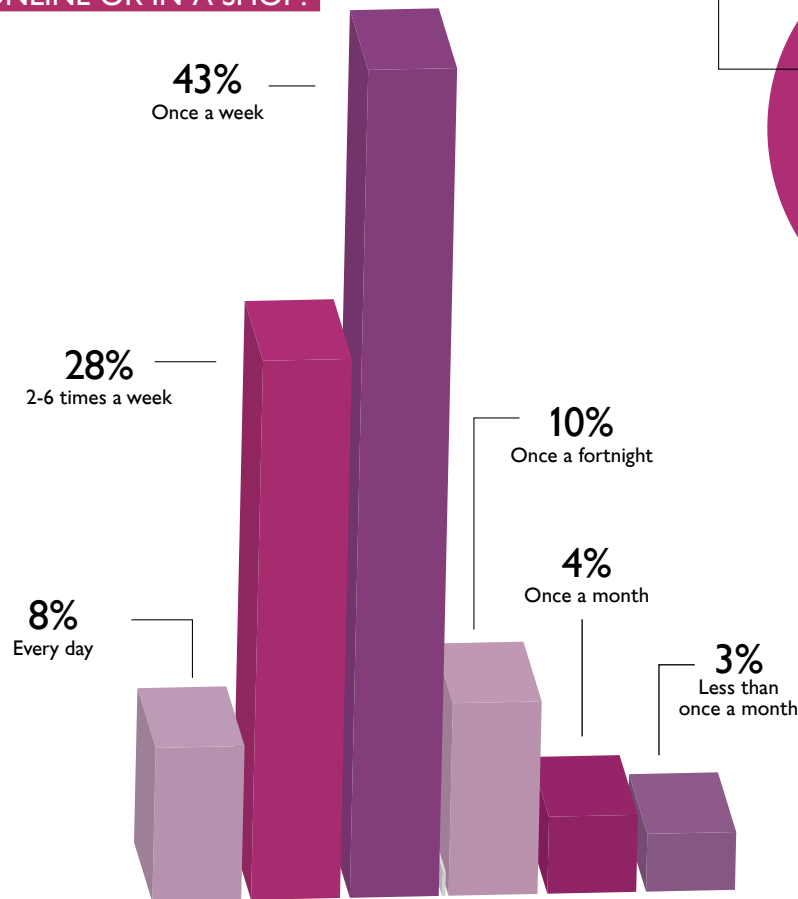
41%
Yes, but not for the first time

23%
Yes, for the first time

36%
Not at all



ON AVERAGE, HOW OFTEN DO YOU SHOP FOR FOOD, EITHER ONLINE OR IN A SHOP?



MANY WAYS TO SHOP

- Our waitrose.com website increased its capacity from around 50,000 orders a week to as many as **300,000**. The site is now a £1 billion-a-year sales channel in its own right.
- Customers can have orders delivered to their door or they can Click & Collect in store.
- Our partnership with Deliveroo means groceries can be delivered to shoppers' homes in as little as 20 minutes (see the Deliveroo map on page 19).

TREND FIVE

SOCIAL EATING

Three-quarters of all 18-24-year-olds looked at TikTok and Instagram for food inspiration during lockdown, demonstrating just how key these social media platforms have become in our nation's food culture. Further, one in 12 people across all age groups posted a picture of their food or their 'tablescaped' meal setting on social media – or sent a snap to a friend – in the days leading up to our poll. This is twice as many people as a year ago. Eye-catching crockery is the order of the day. Sales of colourful dinnerware at John Lewis rose by a third over the year, overtaking demand for more traditional white plates and bowls. Meanwhile, sales of cafes and jugs rose by a quarter, with beer glasses up by a fifth.

Platforms such as TikTok and Instagram have put the fun back into cooking and mealtimes. A total of 31% of all respondents said they've increased the frequency with which they post photographs of their food or dining table on social media this year. During lockdown, such platforms gave us a means of connecting with others when face-to-face contact was difficult. But food pictures and tablescaping are no flash in the stylishly angled pan – they're here to stay. One in five people plan to carry on posting photos going forward. Across all age groups, 28% of respondents said they regularly look at social media for food inspiration.

The reason is simple – social media makes the world of food come alive. Cooking is colourful, collaborative, entertaining and dynamic. These platforms are bursting with food ideas and hacks, ranging from the kookily indulgent

(homemade Skittles frappuccino, anyone?) to the simple (pesto eggs) and those proudly inauthentic recipes that deliberately mash up global ingredients (banana, miso and caramel cake, for example). We have seen sales of all sorts of unexpected products rise due to our social media activity and we don't expect this trend to go anywhere anytime soon (see the TikTok year on pages 16-17).

"These platforms are the way that people express themselves and share ideas and enjoyment. Food on these platforms is creative, exciting and fast-moving," says James Bailey.

We asked customers why they post online. The most popular answer is because food is 'colourful and pretty'. Many like to share recipes, some enjoy tablescaping, some are competitive, some say it's expected of them, and a few are just bored.

The trend also reflects a new self-respect. The rise of social media in the food world feeds into the greater pride that people feel when they cook, as referenced in our previous trend. Our survey found that 76% of 18-24-year-olds take greater pride in how their meals taste than they did previously. And 75% of them said food is more important to them today than it was pre-pandemic. The 18-24s are also the age group who've become the most adventurous in the kitchen during the pandemic. It's no coincidence that they're also generation TikTok.



35%
of people post pictures of their food because they're proud of it



31%
of us have been posting food and table pictures on social media more than in previous years



27%
of 18-24-year-olds post food pictures daily

"FOOD ON THESE PLATFORMS IS CREATIVE, EXCITING AND FAST-MOVING"



TREND SIX

The pandemic has focused customers' minds on the planet, and with the high-profile COP26 about to start we expect this to continue.

Three-quarters of our respondents have tried harder not to waste food this year, with 56% saying it's something they intend to carry on with. Meanwhile, 77% are concerned about the amount of plastic in their grocery packaging, and 71% have tried to reduce the amount of packaging they take into their homes. One of our key priorities at Waitrose is to ensure sustainability in our food and supply chain, whether that's through encouraging a circular economy, managing our carbon levels or rewilding our farms' natural ecosystems. For customers and Partners alike, a healthy planet means the world to us.

On packaging, our target is for all own-label food packaging to be recyclable, reusable or home compostable by 2023. We are already helping to recycle more flexible plastics, including crisp packets, sweet wrappers and clingfilm, in our stores. This year we were ranked first in Greenpeace's annual plastics reduction league table for the second year running. We're using more than 100 tonnes of 'prevented ocean plastics' across 71 of our own-label products; these are plastics that have been intercepted before they've reached the ocean. In September, we introduced a new reusable shopping bag that is three times more durable than our previous bag. These new DuraBags are made from recycled material and are fully recyclable themselves.

We hate waste as much as customers do. All food waste from our branches goes to anaerobic digestion to be used in natural fertilisers or renewable energy, while our ambition is to help halve UK household food waste by 2030. We have a long-term partnership with FareShare, the charity dedicated to fighting hunger, which counts England footballer Marcus Rashford as an ambassador. Our survey found that 50% of respondents are more inclined to donate to charities such as FareShare than in pre-pandemic times, a figure that is heavily skewed towards younger shoppers. In February we galvanised our suppliers to divert more than five million surplus apples, carrots, mushrooms, sprouts and other vegetables from their farms to FareShare. Together, FareShare and Waitrose have redistributed the equivalent of more than 6.9 million meals since 2017.

Our ambition is for all our UK supplier farms to be carbon neutral by 2035 – we're already rolling out a carbon net zero project across all our beef farms. And we're making further strides in animal welfare. For example, this year we increased the amount of space that hens have to roam by 40% in one of our egg farms. Ethics and sustainability mean a lot to all our customers, but they're particularly important to members of Gen Z, or people who were born between 1997 and 2015. These are our future customers, and sustainability will only rise further up their – and our – agendas in the years to come.

There's still much more to be done. More than a third of the people we polled (37%) agree that businesses are doing enough to help the environment, while 27% disagree.

97%

of electricity procured by the John Lewis Partnership is currently renewable certified, close to our 100% target

We have pledged to install

800

Shell electric charging points outside Waitrose stores by 2025

At least

10%

of land at all our UK dairy farms is devoted to biodiversity and habitat management, something that's unique to Waitrose

70%

of the leather used in our own-label John Lewis sofa range comes from cows in the Waitrose supply chain

69%

of Gen Z-ers say they're more likely to buy from a company that focuses on social causes

OUR TARGET IS FOR ALL OF OUR OWN-LABEL FOOD PACKAGING TO BE RECYCLABLE, REUSABLE OR HOME COMPOSTABLE BY 2023

REGENERATING OUR PLANET



JANUARY THE TORTILLA WRAP

Place a circular wrap on a chopping board and cut a line from the centre to the bottom. Place a different filling in each quarter – cheese, houmous, ham, onion, lettuce, anything to your liking. Starting to the left of the cut and working clockwise, fold the quarters over each other so it resembles a fan. Lightly griddle for two minutes on each side. That's a wrap! Sales of wraps and flatbreads rose by 37% in January, while online searches increased almost 200%.

FEBRUARY FETA PASTA

Feta sales rose at Waitrose this year as this TikTok craze from Finland garnered nearly one billion views. It involves baking a block of feta with cherry tomatoes, garlic and lashings of olive oil. Once the cheese is soft and creamy, you stir in your cooked pasta.

Last year the average UK user spent
41
minutes a day on TikTok

MARCH OVERNIGHT OATS

This can be as healthy or hearty as you like. Put rolled oats in an empty jam jar and add milk, chia seeds, fruit, berries, maple syrup or even pieces of chocolate. Flavour with cinnamon or vanilla and leave covered in the fridge overnight. Et voilà, in the morning breakfast is waiting for you. Searches for overnight oat recipes at waitrose.com were up 15% in March 2021 on March 2020.

JUNE ICED COFFEE

As temperatures rose, iced coffee became a DIY thing. The recipe is easy: it's a mix of caramel drizzle or syrup, ice, coffee and milk or cream. But TikTok-ers added sea salt, honey or peanut butter to take iced coffee to a new level.



JULY WHIPPED LEMONADE

If life gives you lemons... whisk them up with whipped cream and condensed milk, add ice and enjoy one of the drinks of the summer. Seriously. Whipped, creamy lemonade sounds decidedly niche, but thousands swear by it. It tastes a bit like liquid ice cream. #Whippedlemonade had seen 5.7 million views on TikTok.



#HOME CHEF
hashtag has 4.3 billion views on TikTok

TOP
OF
THE

TIKTOKS

APRIL THE LOADED BAKED POTATO

The simple spud became cool again. Searches for jacket potato and baked potato on waitrose.com rose by 436% and 313% respectively in April as homeworkers embraced this versatile mainstay. Pimped and twice-baked potatoes also became big deals, with TikTok-ers adding fillings from chicken or seafood to eggs and bacon.

MAY PESTO EGGS

Almost 12 million TikTok users watched a video of this food hack posted by Amy Wilichowski. Simply heat pesto in a pan instead of oil, spread it around and crack an egg into it, adding seasoning. It can be

eaten on its own or in a muffin, and all manner of extras – from avocado to chilli flakes – can be added. Pesto sales at Waitrose rose 108% over one week in May.



Trends born on TikTok are influencing our sales. From the simple hacks to the far-out trends, we chart 2021's hottest viral recipes

AUGUST THE BREAKFAST BOARD

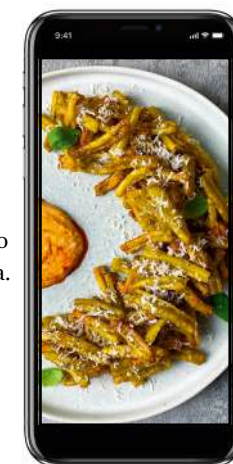
This new morning trend is one for the aesthetes. A breakfast board is like a charcuterie board – but for breakfast. Pancakes, waffles, fruit, cupcakes and pots of honey are artfully laid out and filmed. The #breakfastboard hashtag on TikTok has had an astonishing 5.5 million views. Sales of breakfast pastries at Waitrose rose by 26% over the summer, while brioche, crêpes and waffles rose by 14%. Sales of serving platters at John Lewis rose by 40%.

SEPTEMBER MOZZARELLA DOUGHNUTS

More than 30 million people have watched these being made on TikTok. While they're certainly a naughty treat, they're also extremely tasty. Put melted mozzarella in a silicone doughnut mould and freeze for 15 minutes. Remove the cheese from the mould and dip it in beaten egg, cover it in flour, then dip it in the egg again. Coat it in crushed crisps and deep fry for oozy heaven.

OCTOBER PASTA CHIPS

These crunchy delights have been massive. To make, add sun-dried tomato pesto to cooked pasta. Then air fry for 10 minutes, shaking the pasta halfway through. Sales of air fryers at John Lewis rose by 400%.



The TikTok app is downloaded
1 MILLION
times a month in the UK

DELIVERED BY DELIVEROO

Our partnership with Deliveroo means that customers' groceries can be with them in as little as 20 minutes. It's a new way of shopping: a third of people we polled have been using on-demand food delivery apps during the pandemic. But what Waitrose products are most popular on Deliveroo? If you thought the service was all about crisps and last-minute bottles of Sauvignon Blanc, think again – 21% of all Waitrose orders are for fruit and veg.

“ We know how important convenience is for our customers, which is why we've extended Deliveroo to 150 locations across the country. We're planning to extend this offering to more branches next year, so even more customers will have access to Waitrose products. Our bestselling bundles include fresh fruit and vegetables, with nearly 50% of all orders containing items from these collections ”

NAOMI CHEUNG
Partner & Online Merchandiser

DURING THE WIMBLEDON FORTNIGHT, SALES OF STRAWBERRIES ROSE BY **123%** COMPARED WITH THE MONTH BEFORE. MONTH-ON-MONTH SALES OF PIMM'S ROSE BY 111% DURING THE TOURNAMENT.



1,412%

RISE IN FLOWER ORDERS FOR VALENTINE'S DAY, COMPARED TO THE WEEK BEFORE.

SALES OF FLOWERS ON MOTHER'S DAY ROSE BY **121%** COMPARED WITH THE DAY BEFORE.

1,031%

INCREASE IN CHRISTMAS CARD SALES IN THE WEEK BEFORE 25 DECEMBER, COMPARED TO THE PREVIOUS WEEK.



TOP 3 ITEMS IN EACH LOCATION



Lockdown has brought out our inner explorers. With more time on our hands, we've taken a greater interest in the stories behind our drinks. We've also become bolder and more adventurous in our drink choices. There has been a rise in households having regular cocktail hours in the evening as people unwind from the day. And we're splashing out when we can by trading up to better quality – and occasionally bigger – products. Known as the 'lipstick effect' – people are indulging in little treats to cheer themselves up and celebrate the good things in life.



CREAM LIQUEURS

The ultimate treat. Sales of cream liqueurs are rising – and not just at Christmas time. People are enjoying Kahlúa, Baileys or the new Hotel Chocolat liqueurs over ice – or even over ice cream – all year round. There's innovation in this area too. Vegan Wild-Arbor Luxury Clear Cream Liqueur is made with natural ingredients and is dairy and gluten free. It's the world's first and only clear cream liqueur.

MALT WHISKY

Duty-free favourite Scotch whisky has had a tough year due to a global fall in airport passengers, but we've seen strong sales of single malt whiskies as shoppers have treated themselves. Over Christmas, sales of single malts grew by 6% compared with the year before. The rise started just before Father's Day in June 2020 and carried on – we saw very strong Father's Day sales in 2021 too. From sweet to peaty, and from the islands to Speyside, our range takes in all the flavours and regions that Scotch whisky has to offer.



WHAT WE'VE BEEN DRINKING

SUNDOWNERS AND APÉRITIFS

People are ending their working days with a special pre-dinner drink. The evening glass of wine is being replaced by something spirit-based with at least two or three ingredients. We have seen strong sales of Aperol (up 148%) and Martini Extra Dry Vermouth (up 33%). Sales of Pampelle Grapefruit Apéritif have risen 4,850% compared with last year. Many households are having regular happy hours after work too.



NICHE WINES FROM AROUND THE WORLD

Our buyers often come across beautifully made wines as they scour the world. Our Loved & Found range includes less well-known grape varieties, such as Pais from Chile which is quite similar to Beaujolais. Loved & Found is like a secret wine club – but it's available to all. Loved & Found bestsellers include Sparkling Pecorino, Arinto and Elbling.

LOCAL SPIRITS

Lockdown has led to a rise in people's appreciation of local produce. So we've upped the range of local spirits we sell. Ramsbury Single Estate London Dry Gin and Single Estate Vodka, for example, come from a distillery in the heart of the Wiltshire countryside. Meanwhile, Cambridge Dry Gin – which evokes the sensorial delights of an English meadow in summer – comes direct from the university city.



THE BIGGER, THE BETTER

As a nation, we're after versatility when it comes to our tipples, and this has been demonstrated in the nature of our Champagne sales as people celebrated the easing of restrictions. While sales volumes of half bottles increased by 32% as people treated themselves to a tittle at home, sales of large format bottles such as magnums rocketed by 87%. This splurge coincides with people reconnecting with their friends and loved ones.

APPASSIMENTO

Appassimento reds from Italy account for almost a third of all our red wine sales from the country. The word refers to the process of drying grapes in ventilated drying lodges over the winter months, a process that makes the wine rich and complex. Our range comes from all over Italy – from Piedmont to Sicily. In total, sales are up 40% year-on-year.

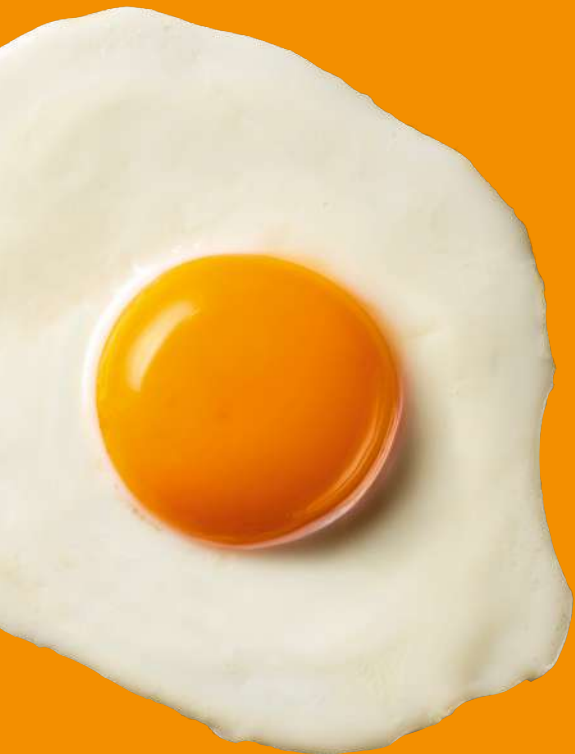


FUTURE TRENDS

1

THE BIG BREAKFAST

Breakfast will become a greater focal point in our lives. With fewer commutes to work, families have more time together at the breakfast table. It's the mealtime equivalent of a family group hug before the day begins. Consumption of breakfast staples is rising. A survey carried out during the first lockdown found that we ate eggs for breakfast 68% more times than in the previous year. Bacon was up 21% and pastries up 25%. In some cases, breakfast is being spread out across the morning rather than being confined to first thing. People are becoming more adventurous when it comes to the first meal of the day, with dishes such as shakshuka and Mexican breakfast burritos growing in popularity.



2

UMAMI

Umami will continue to grow in popularity, becoming the prevailing profile in our food. The Japanese word is one of the five basic tastes – along with sweet, bitter, salty and sour – and is akin to a savoury flavour (it translates as 'pleasant savoury taste'). Sales of our Cooks' Ingredients Umami Paste, which adds depth of flavour to any dish, are up 17% compared with 2019.

3

CLIMATARIANISM

A diet focused on reducing your carbon footprint is gaining popularity. As part of this year's Food & Drink Report, we asked shoppers whether the carbon footprint of their food is important to them. Nearly 70% said it was either 'very' or 'somewhat' important. It's people's way of keeping tabs on their personal impact on the environment.

4

REWILDING

A quarter of the land at our 2,800 acre Leckford Farm Estate in Hampshire is dedicated to natural biodiversity. Rewilding is all about making space for nature, restoring ecosystems and doing our bit to help mitigate climate change. Sir David Attenborough urged viewers to 'rewild the world' in his 2020 Netflix documentary, *A Life on our Planet*, and we will see much more of this, both in rural and urban areas. On our dairy farms, we stipulate that at least 10% of space needs to be given to natural land.

5

POTATO MILK

We've seen the popularity of soy, almond, oat and pea milk in recent years. Now it's the turn of potato milk. Low in sugar and saturated fat, it's set to dominate coffee shop menus in the coming months.



6

PRE-BATCHED BOTTLED COCKTAILS

Forget a G&T in a can. Premium pre-batched cocktails in a bottle are set to be huge. For a start, they're convenient. Second, they taste great. And third, they are cost-effective as consumers don't need to buy all the ingredients separately. There has been a trend towards people upgrading their tipples for years, and pre-batched bottled cocktails are set to represent the next wave.



7

BORDERLESS FREESTYLE

The trend for fusing one global cuisine with another is over. Instead, adventurous cooking is all about a freestyle and borderless approach to the world's larder. We will increasingly see the mish-mashing of food styles from around the world – and there are no rules governing any of it. Drawing on their travels, adventurous cooks (both in the home and in restaurants) will blend flavours, formats and techniques to create new dishes. These creations may be without heritage but they'll be bursting with inspiration.

SUSTAINABILITY CONTINUES TO TAKE CENTRE STAGE

PEOPLE AND PLANET OVER PROFIT

Pressure will continue to mount to reduce the amount of carbon being released into our atmosphere and for many businesses and other organisations, this will mean doing things differently

Trust to plant 50 million trees by 2025 and a move to farming methods that help sequester carbon will form a major part of the solution.

MARINE PERMACULTURE

Growing up to half a metre a day, seaweed removes CO2 from the water and helps to restore its alkaline balance. Not only an important food source, seaweed could also help draw down significant volumes of carbon from the atmosphere, in turn cooling and replenishing marine ecosystems to more sustainable levels.

CLOSING THE LOOP

By looking to nature and closing the loop to ensure nothing is built for one use, we can make better use of our resources and help the environment in the process – a modern-day must for any sustainably conscious shopper or business.

GOING FULLY ELECTRIC

As the global economy grows, the number of cars on roads around the world is set to double to two billion by 2040, according to the latest predictions. A quicker transition to electric cars will be critical in managing carbon emissions for both consumers and businesses.

PLANTING AND REPLENISHING

Rewilding of natural habitats and a move back to regenerative farming is not only essential, but critical to manage growing levels of CO2. Initiatives such as those being led by the Woodland



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