

Create Consumer-centric Values



INTAGE INDIA Pvt. Ltd.

# Report Survey on Indian Food Habits

July, 2022

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# Research design

# Scope of the Research

Objective	To understand food habits in India																																																									
Area	Delhi, Mumbai, Bangalore, Kolkata Lucknow, Indore, Kochi, and Guwahati																																																									
Methodology	Online survey (INTAGE's Online Research Panel)																																																									
Period of survey	June 2022																																																									
Criteria	Male and Female aged 20-49																																																									
Number of Sample	600 samples																																																									
Quota	<p>Achieved data was collected as follows. * The data is weighted to represent the population (City x Gender/Age)</p> <table border="1"> <thead> <tr> <th>Gender/Ages</th> <th>20s</th> <th>30s</th> <th>40s</th> <th colspan="4"></th> </tr> </thead> <tbody> <tr> <td>Male</td> <td>100</td> <td>100</td> <td>100</td> <td colspan="4"></td> </tr> <tr> <td>Female</td> <td>100</td> <td>100</td> <td>100</td> <td colspan="4"></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th rowspan="2">Cities</th> <th colspan="4">Metro cities</th> <th colspan="4">T2 cities</th> </tr> <tr> <th>Delhi</th> <th>Mumbai</th> <th>Bangalore</th> <th>Kolkata</th> <th>Lucknow</th> <th>Indore</th> <th>Kochi</th> <th>Guwahati</th> </tr> </thead> <tbody> <tr> <td></td> <td>100</td> <td>100</td> <td>100</td> <td>100</td> <td>50</td> <td>50</td> <td>50</td> <td>50</td> </tr> </tbody> </table>								Gender/Ages	20s	30s	40s					Male	100	100	100					Female	100	100	100					Cities	Metro cities				T2 cities				Delhi	Mumbai	Bangalore	Kolkata	Lucknow	Indore	Kochi	Guwahati		100	100	100	100	50	50	50	50
Gender/Ages	20s	30s	40s																																																							
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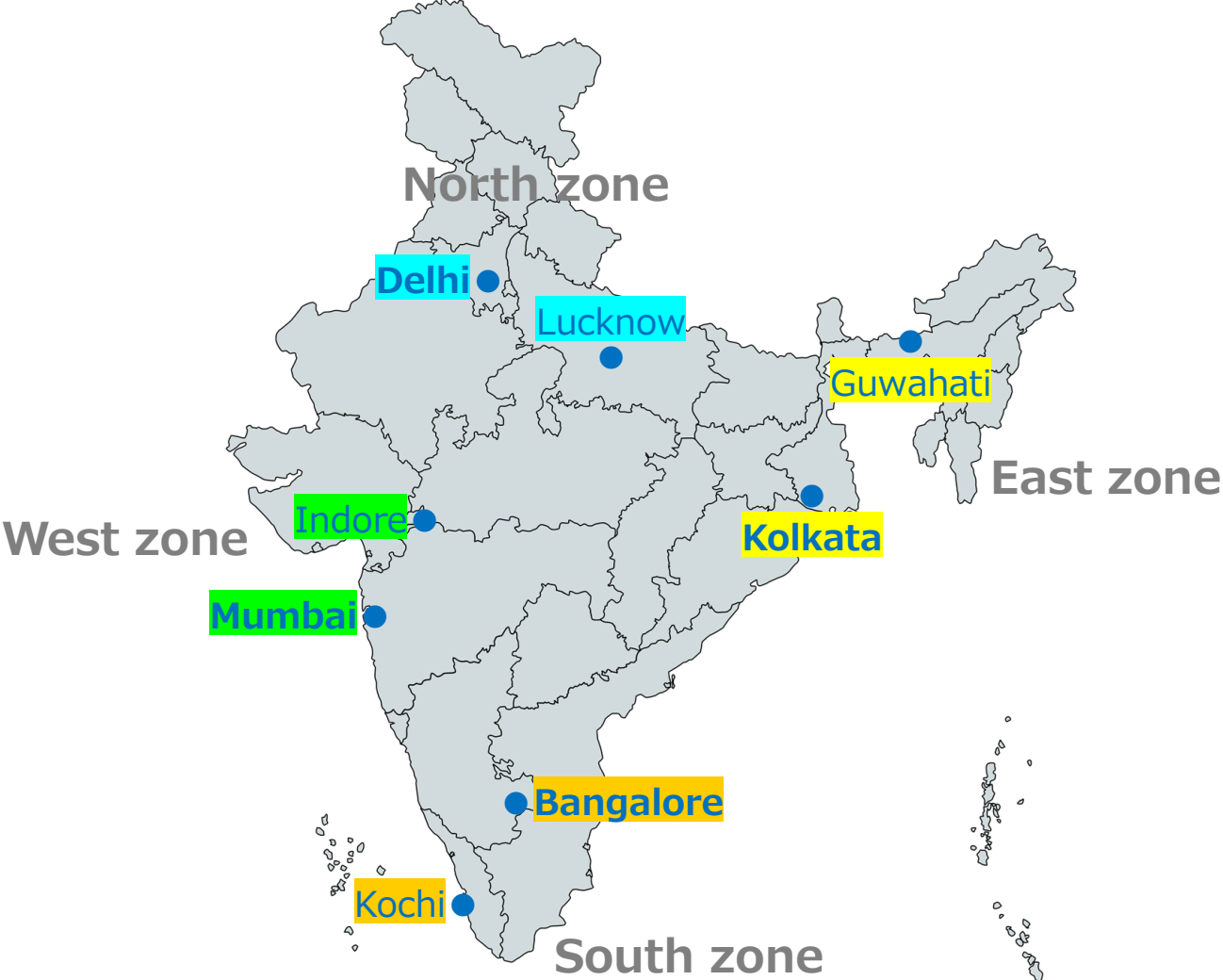
## Details on weighted samples

Achieved samples	Male			Female			TOTAL
	20s	30s	40s	20s	30s	40s	
Delhi	26	19	11	13	14	17	100
Mumbai	11	19	5	29	27	9	100
Bangalore	16	20	13	17	20	14	100
Kolkata	17	22	19	13	10	19	100
Lucknow	7	9	17	6	5	6	50
Indore	9	5	9	7	11	9	50
Kochi	6	2	16	8	5	13	50
Guwahati	8	4	10	7	8	13	50

Weighted samples	Male			Female			TOTAL
	20s	30s	40s	20s	30s	40s	
Delhi	33	27	20	29	24	18	151
Mumbai	41	32	24	32	27	21	177
Bangalore	28	24	15	27	20	13	127
Kolkata	11	11	10	11	10	9	62
Lucknow	8	6	5	7	6	5	37
Indore	6	5	3	5	4	3	26*
Kochi	1	1	1	1	1	1	6*
Guwahati	3	2	2	3	2	2	14*

\*Sample size in the charts is the weighted number to represent the population. We have analyzed based on the original size which are 100 for Metro and 50 for Tier 2 cities.

# Covered Cities in this survey



- **Bold font : Metro city**
- Normal font : T2 city

# Summary

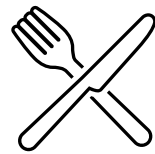
[Notes]

Definition of “Ready-to-eat food” in this survey:  
The food is prepared or cooked in advance.

All that is required to do is to put hot water, boil or heat it and you can have it.

# Summary – Frequency and food consumption

- Overall, more than 60% Indian consumers eat out/ take food away/ use food delivery service /have ready-to-eat food once a week or more. Frequency of 'To eat out' is the highest and they eat out almost once every 3 days.
  - Indian consumers enjoy all the 4 situations mainly with their family. However, they take foods away when they are with friends too while to have RTE food is when being alone as well.
- ➔ Indian consumers enjoy food with their family or friends mainly in all the situation. Only in having RTE food, there might be a need that it can also be something alone.



To eat out/eat out



To take food away



To have food from delivery service



To have Ready-to-eat food

% of 'once a week or more'  
Mean

75%

9.2 days / month

70%

8.5 days / month

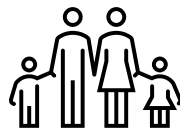
66%

7.2 days / month

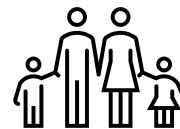
63%

8.0 days / month

With whom



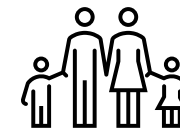
With family  
59%



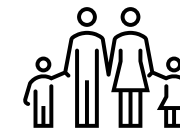
With family  
41%



With friends  
38%



With family  
53%



With family  
43%



Alone  
28%



# Summary – Food delivery and RTE food comparison

• Indian consumers are likely to order food delivery for dinner when they crave for some specific food or they have gatherings. On the other hand, ready-to-eat food is often consumed during breakfast and snack when they want to have something quickly and they feel tired.

➔ Food delivery service should be something which could satisfy Indian consumers’ cravings & special occasions with family/friends. Whereas ready-to-eat food could help them to have something quickly without any hassle from an aspect of convenience.



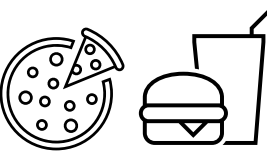
To have food from delivery service



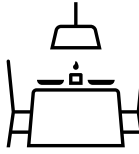
To have Ready-to-eat food

When to have	Food Delivery Service	Ready-to-eat Food
	<p>As dinner 54%</p> <p>As snack 39%</p> <p>With family 53%</p>	<p>As breakfast 51%</p> <p>As snack 50%</p> <p>With family 43%</p> <p>Alone 28%</p>

## Occasions



When you are craving for some specific food  
41%



When you have family or friends gathering  
41%



When you want to have something quickly  
42%



When you feel tired 38%

When you do not feel like cooking or preparing food 38%

**‘Satisfy your cravings & special occasions’**

**‘Get it ready quickly without any hassle’**

# Summary – Food delivery



- 90% of Indian consumers order by food delivery app. Almost all of them use Zomato and Swiggy, both of which are multinational restaurant aggregators. Pizza delivery apps such as Domino’s and Pizza Hut comes on 3<sup>rd</sup> and 4<sup>th</sup>. Male 30s and female 20s are more likely to order pizzas via app.
  - Except for Indian cuisine, Chinese is the most popular one via food delivery app. Only around 10% of them have ordered Japanese cuisine and Korean food as delivery. However, these are more popular in female 30s for Japanese, in female 20-30s for Korean.
- ➔ Japanese cuisine and Korean cuisines are relatively popular among female 20-30s when they order via food delivery app.



To have food from delivery service

TOTAL

By gender & age

How to order	By App 90%	No difference				
<b>Via what app</b> Base: Those who order by apps	1. Zomato	95%	<b>Aggregator</b> → No difference			
	2. Swiggy	94%				
	3. Domino’s	72%	<b>Pizza</b> → Male 30s Female 20s	Domino’s	Pizza Hut	
	4. Pizza Hut	60%		81%	70%	
	5. MCD	35%		79%	68%	
<b>International cuisines ordered via app</b> Base: Those who order by apps	1. Chinese	52%		 Japanese	 Korean	
	2. Italian	35%				
	3. American/Thai	17%				
	...	...		Female 20s	7%	19%
	7. Japanese	13%		Female 30s	20%	19%
8. Korean	9%		Female 40s	16%	12%	

# Summary – RTE food

• Instant noodles ‘packet type’ and ‘cup type’ are consumed the most in the past. Especially those who live in north part such as Delhi and Lucknow have higher consumption of them. As for the future intention, rice category such as ‘instant Biryani’ and ‘instant fried rice’ is high compared to their consumption in Delhi, Mumbai and Kochi.

➔ Instant noodles (packet / cup type) are consumed the most among those who have had RTE foods before. However, rice category instant food such as biryani and fried rice might be in demand in the future.



To have  
Ready-to-eat food

TOTAL

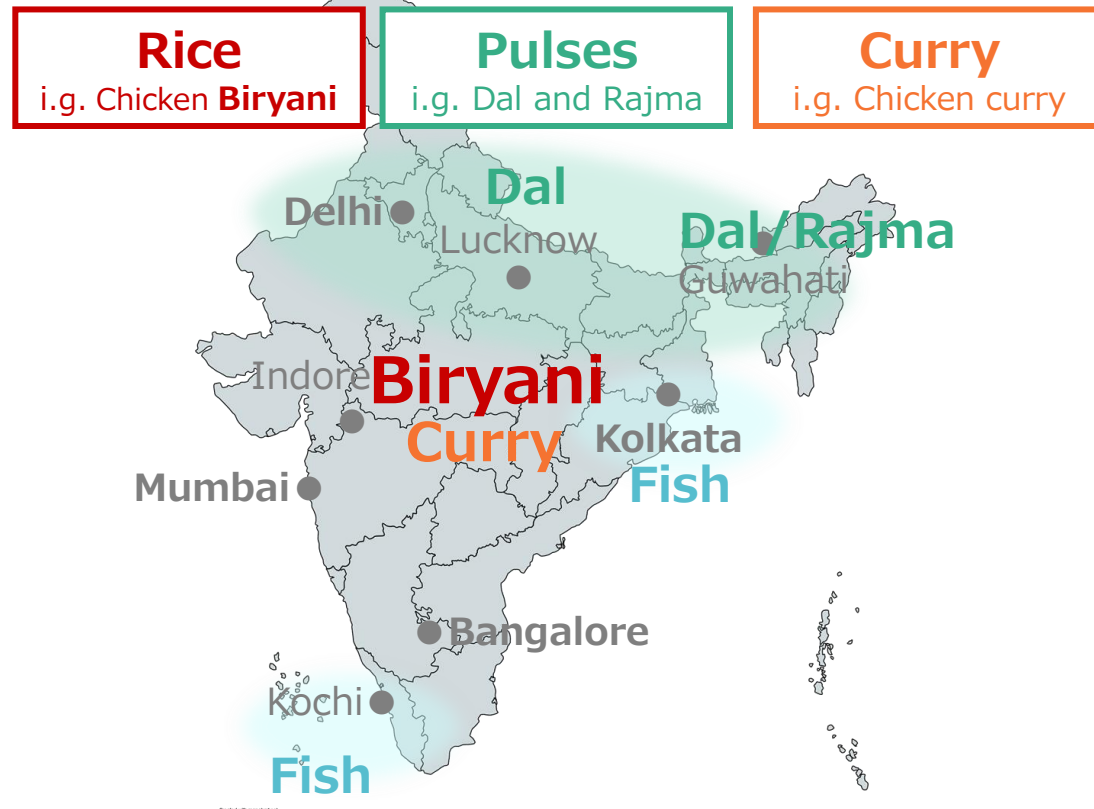
By city

<b>Consumed RTE foods</b> Base: those who have ever had ready-to-eat food.	1. Instant noodles (Packet type)	83%	<b>Noodles</b> → 		Packet type	Cup type
	2. Instant noodles (Cup type)	72%		Delhi	91	82
	3. Instant pasta	51%		Lucknow	83	79
	4. Instant upma	40%				
	5. Instant poha	38%				
<b>RTE foods that they intend to try in the future</b> Base: those who have ever had ready-to-eat food.	1. Instant noodles (Cup type)	53%	<b>Rice</b> → 		Biryani	Fried rice
	2. Instant noodles (Packet type)	51%		Delhi	55	46
	3. Instant Biryani	48%		Mumbai	50	54
	4. Instant fried rice	47%		Kochi	45	54
	5. Instant pasta/dessert	42%				

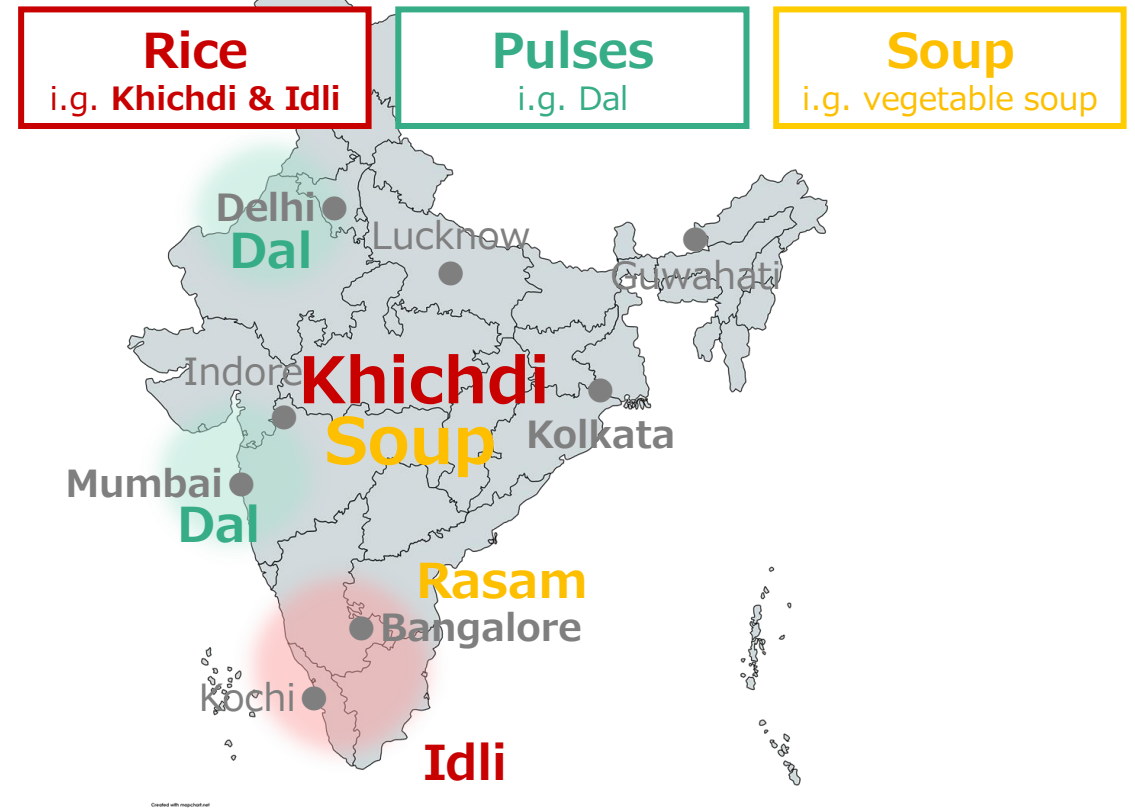
# Summary – Dishes Indian mothers cook / what Indians have when feeling sick

- As for dishes cooked by mothers, there are 3 categories found in total; rice, pulses and curry. Biryani as rice category is mentioned the most all over the cities and pulses category is mainly found in around North to East zone.
  - Regarding to dishes Indians have when feeling sick, 'khichdi' and soup are consumed across all the cities. Other than these, what they have differs depending on cities. But the associated dishes look light on their stomach and healthier than the other Indian foods.
- ➔In general, it is said that India is famous for Indian curry. However, Indians prefer something light, not curry when feeling sick.

## Dishes Indian mothers cook



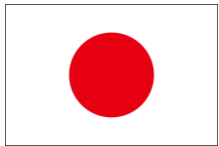
## What Indians have when feeling sick



# Summary – Penetration of Japanese cuisine compared with Korean

- One fourth of Indian consumers has ever had Japanese cuisine, which is slightly higher than Korean cuisine. Future intention to have Japanese cuisine is 30% and especially female aged 30-40s have higher intention. (Among 16 international cuisines, Chinese is the most consumed in the past. Italian comes on second and Thai is on 3rd.)  
For Indian consumers, images/ associated dishes towards both cuisines are almost same.

➔ Indian consumers do not usually have Japanese cuisine and Korean cuisine. Therefore, it seems that most of Indian consumers cannot tell differences between Japanese and Korean cuisine.



Japanese cuisine



Korean cuisine

<b>Ever Experience</b>	<b>24%</b> 7th out of 16 cuisines	>	<b>18%</b> 8th out of 16 cuisines
<b>Experience in 1 month</b>	<b>10%</b> Female 30s-40s 15-17%	≐	<b>9%</b> Female 20s-30s 16%
<b>Future intention</b>	<b>30%</b>	≥	<b>26%</b>
<b>Images</b> from pre-code question	Both of them was placed in ' <b>less availability</b> '. Specific images are <b>healthy, hygienic, bland</b> and <b>expensive</b> .		
<b>Common association</b> from open answers	Dishes: <b>Noodles, ramen, sushi and rice</b> Ingredient: <b>chicken and fish</b> Taste: <b>spicy</b>		
<b>Characteristic association</b> from open answers	<b>Miso and Healthy</b>		<b>Kimchi and Instant</b>

In general, it is not said that Japanese cuisine is spicy. Therefore, those who associated Japanese cuisine with "spicy" might have mixed up these two cuisines.

# Summary – Nutrients consciousness

- Less than half of Indian consumers check nutrients on food package when buying food. Female check nutrients more than male. Protein, Vitamin A/C and iron are well known and proactively consumed. Especially protein is consumed by male 30s.
  - Reasons for actively trying to take nutrients are to improve ‘immune system’ and ‘physical strength’ which are for their whole body. For immune system, female 40s is highly conscious about that.
- ➔The reason why female check nutrients more than male might be because they usually go to buy groceries and cook for their family.





## Nutrients consciousness

### TOTAL

### By gender & age

Whether or not checking nutrients on package

‘I always check nutrients on package’  
44%

	<b>Male 36%</b>	<	<b>Female 52%</b>
	20s 36%		 20s 48%
	30s 43%		30s 57%
	40s 26%		40s 52%

Awareness of nutrients and actively taken ones

Nutrients awareness	
1. <b>Protein</b>	<b>79%</b>
2. Vitamin C / Iron	70%
4. Vitamin A	69%

Actively taken ones	
1. <b>Protein</b>	<b>67%</b>
2. Vitamin C / Iron	53%
4. Fiber	46%

Protein awareness		Actively taken Protein	
Male 20s	73%	Male 20s	62%
<b>Male 30s</b>	<b>84%</b>	<b>Male 30s</b>	<b>72%</b>
<b>Male 40s</b>	<b>84%</b>	Male 40s	62%

Reasons for actively trying to take nutrients

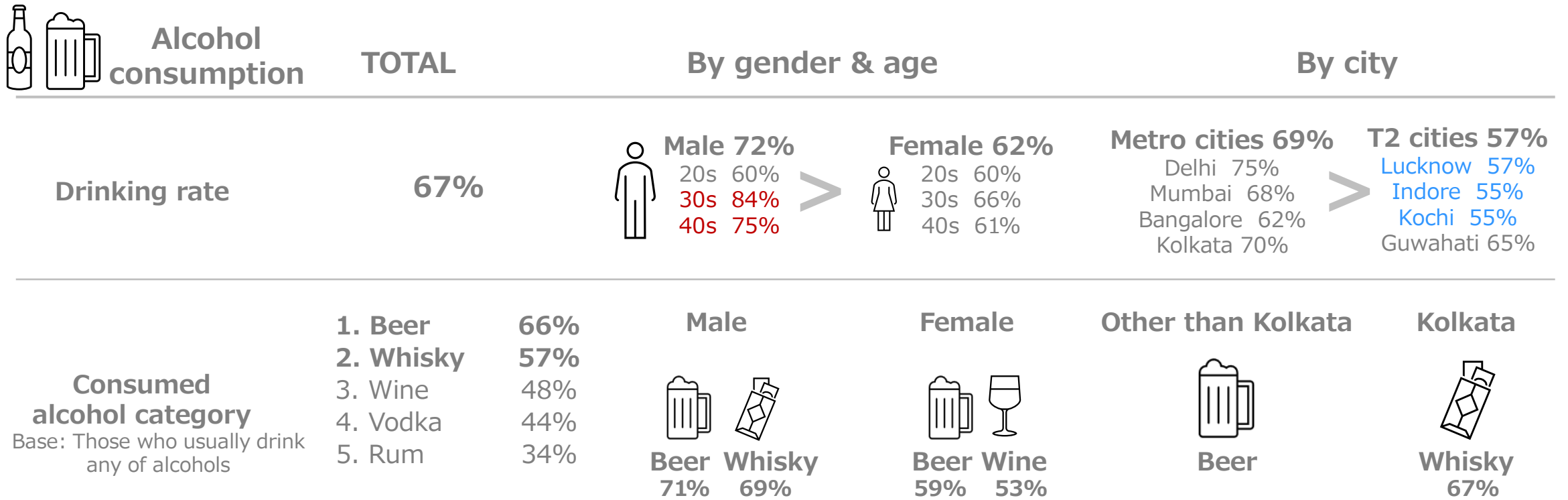
1. **To improve immune system** 61%
2. **To improve physical strength** 59%
3. For bone strengthening 52%

‘To improve immune system’

Female 20s	62%
Female 30s	60%
<b>Female 40s</b>	<b>73%</b>

# Summary –Alcohol consumption

- 67% of Indian consumers drink alcohol at the overall level. Drinking rate is higher in male than in female. Beer is consumed the most and whisky comes on the second. Wine is popular among female as well.
  - By city, there are more drinkers in metro cities than in T2 cities. Overall, beer is the most consumed alcohol in almost all the cities. However, only in Kolkata, whisky is consumed the most.
- ➔ Male 30-40s living in metro cities drinks more than the other segments and they prefer beer and whisky.



# Detailed Findings

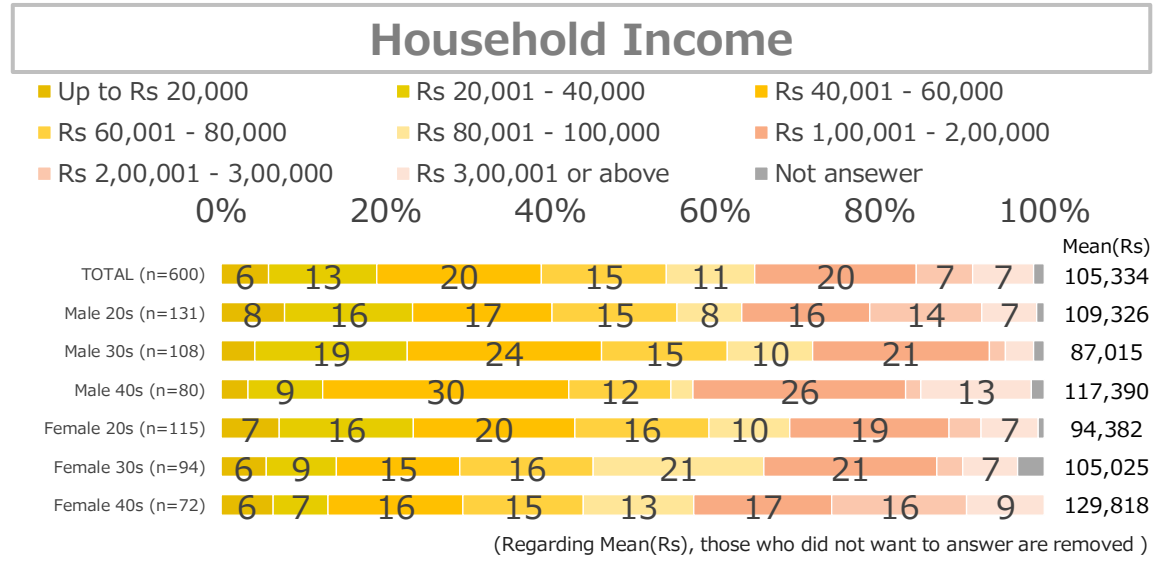
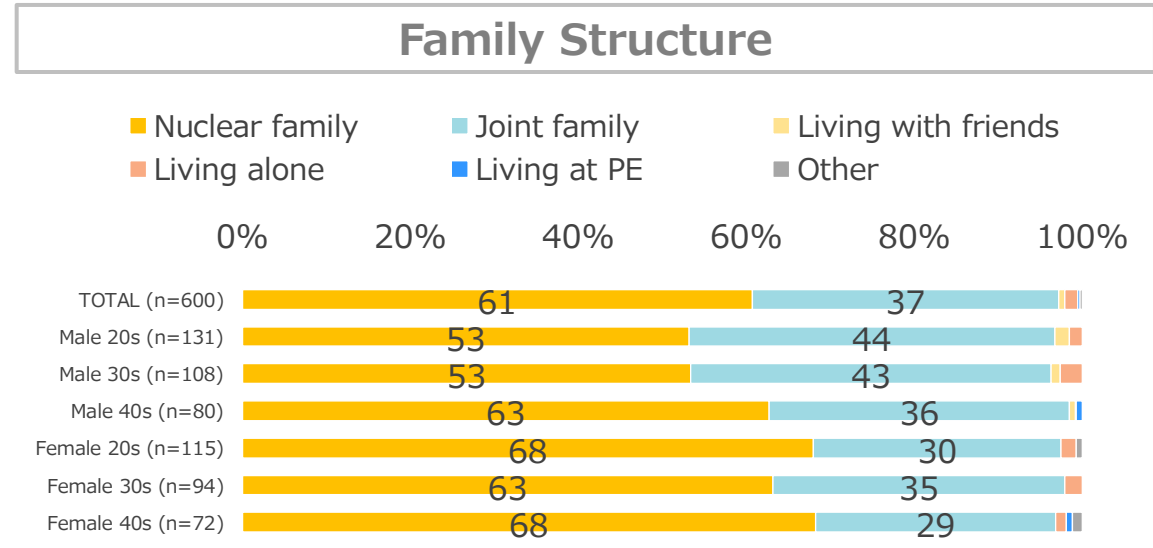
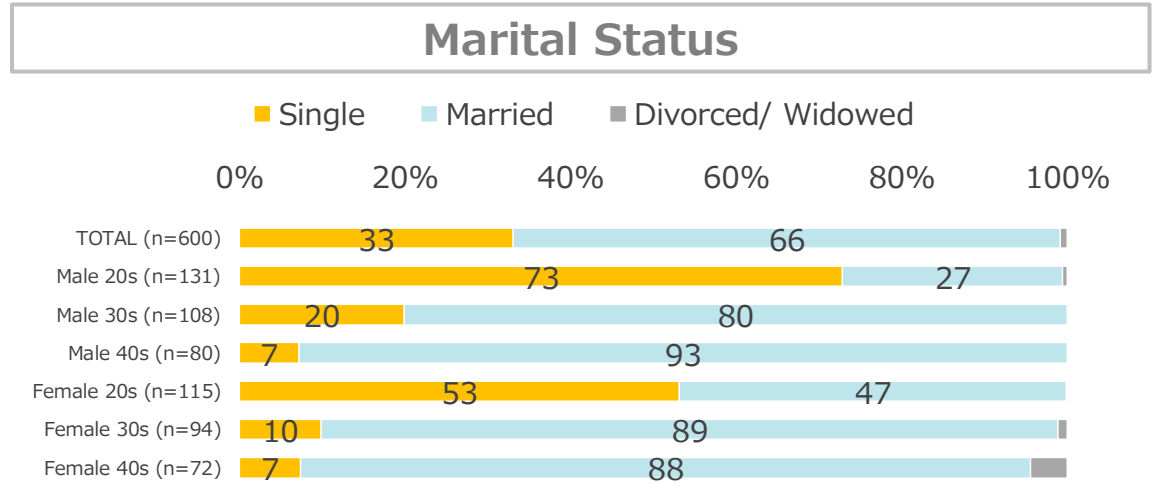
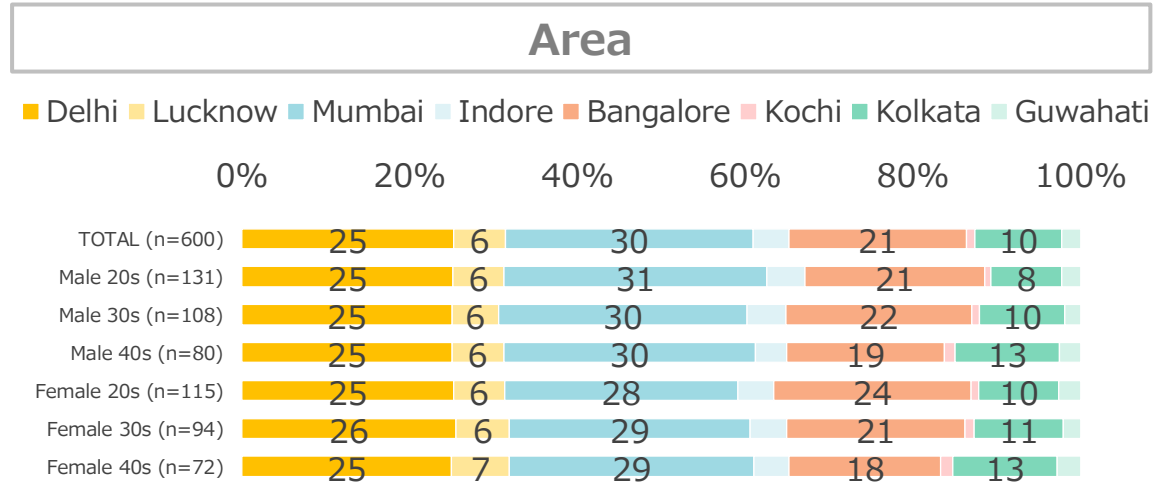


# Consumers' Profile

# Profile 1

By Gender & Age

(\*Values less than 5% are hidden)

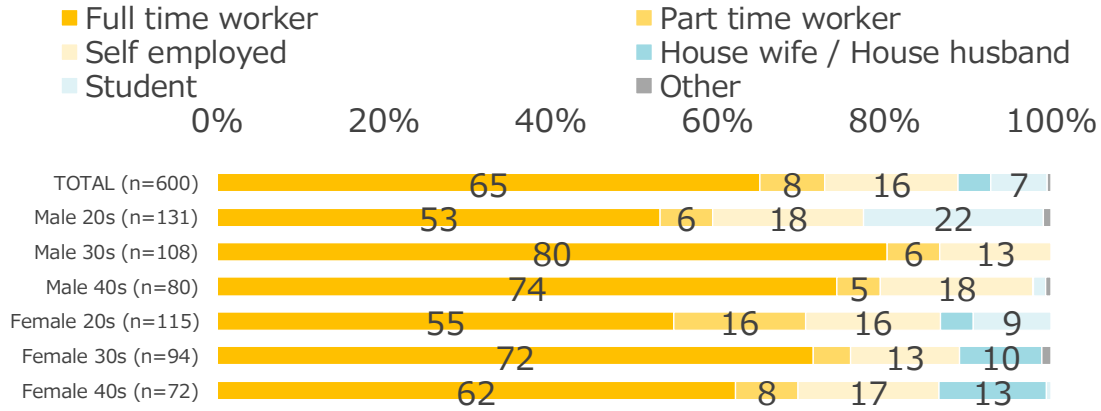


# Profile 2

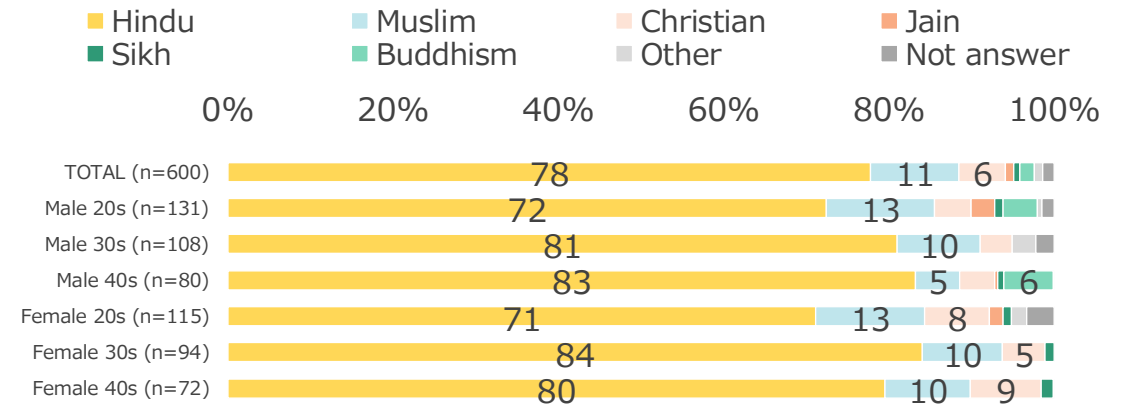
By Gender & Age

(\*Values less than 5% are hidden)

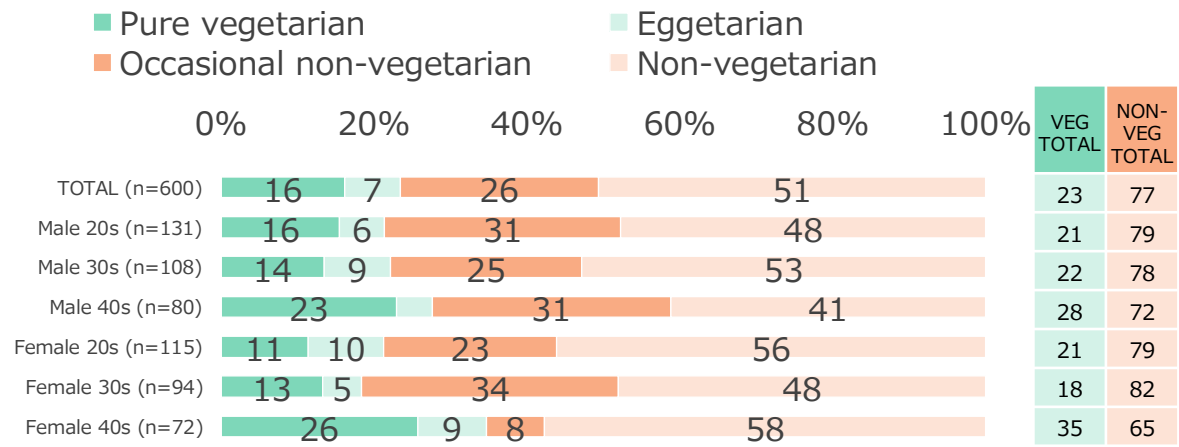
## Occupation



## Religion



## Food Habit

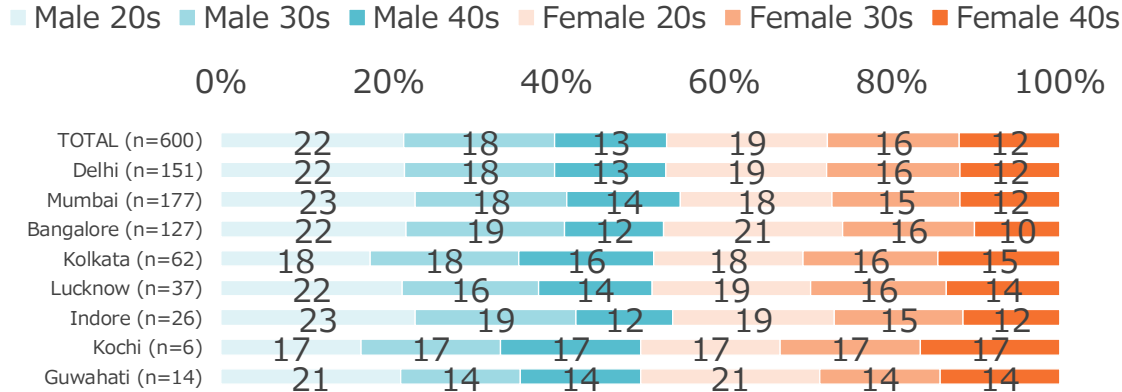


# Profile 1

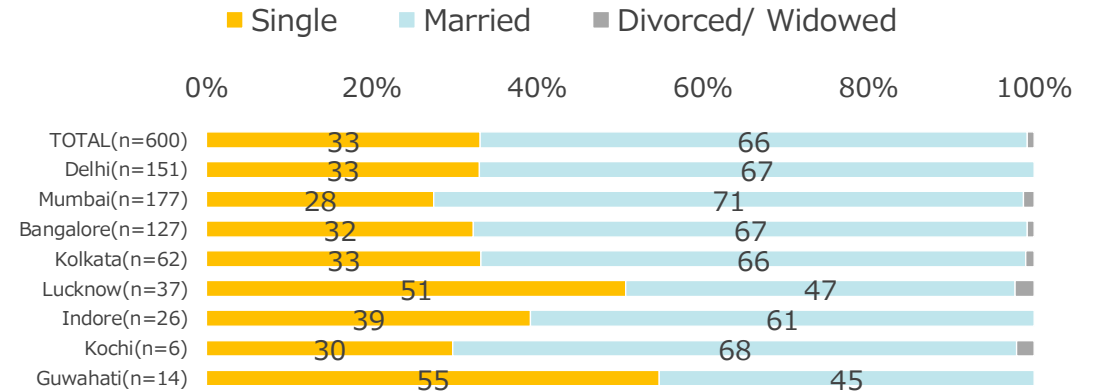
By City

(\*Values less than 5% are hidden)

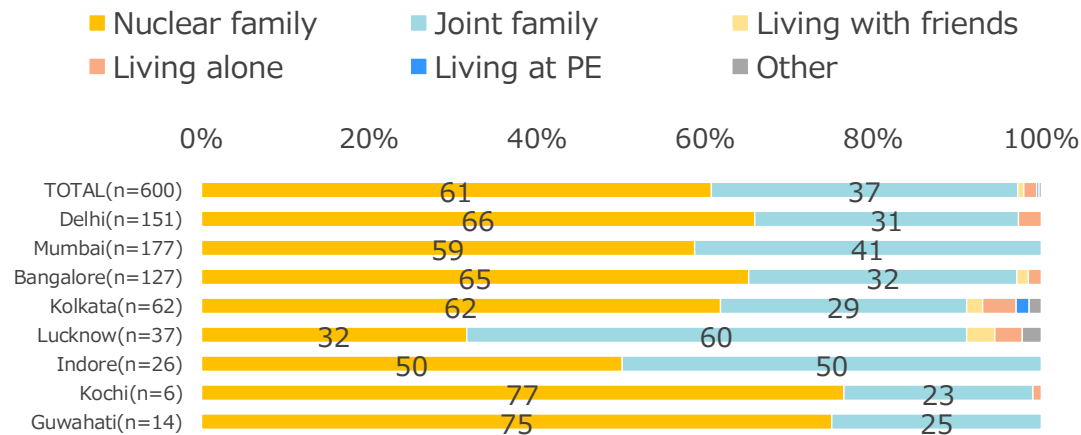
## Age



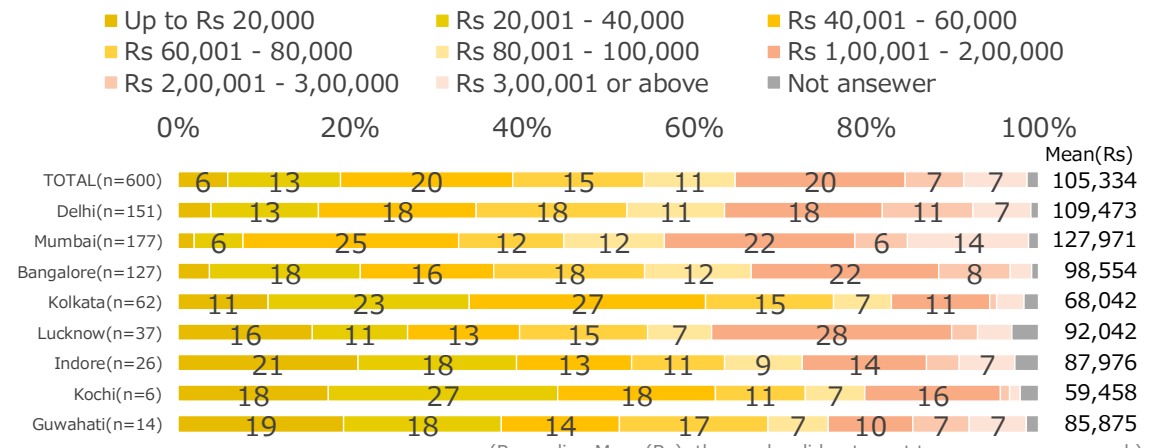
## Marital Status



## Family Structure



## Monthly Household Income



(Regarding Mean(Rs), those who did not want to answer are removed)

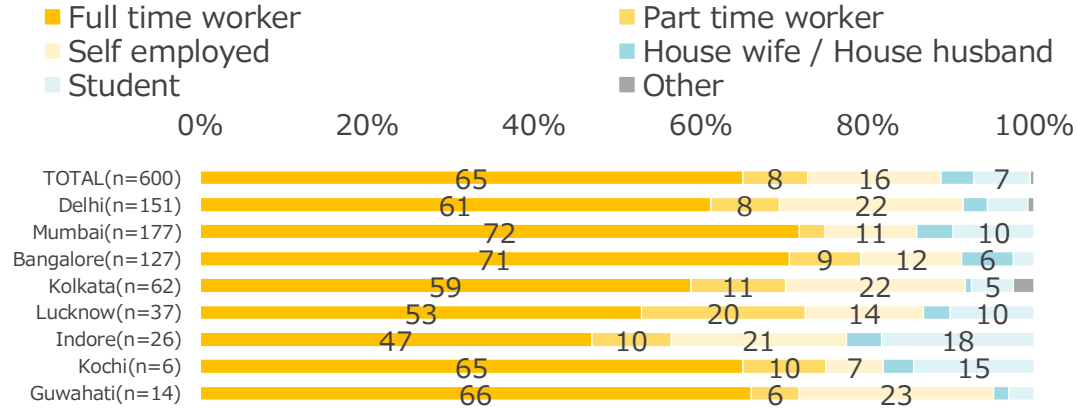
\*Samples in Kochi and Guwahati are 50s each before they are weighted

# Profile 2

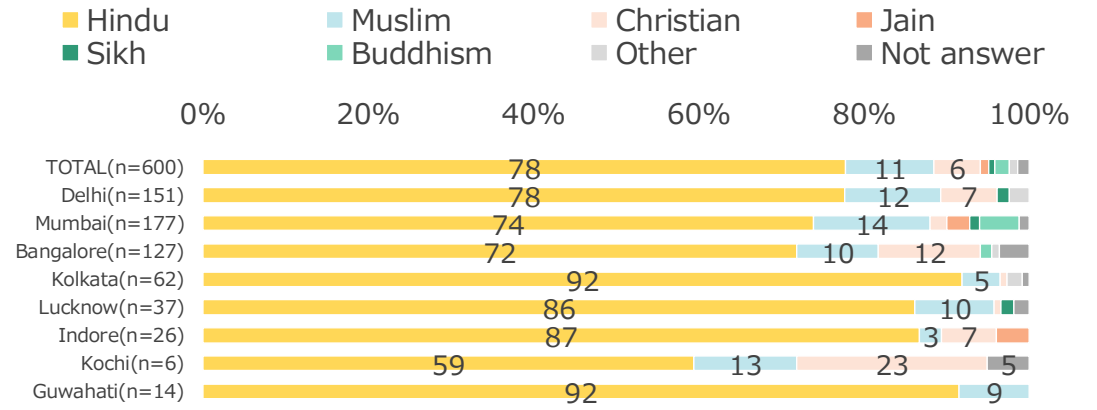
By City

(\*Values less than 5% are hidden)

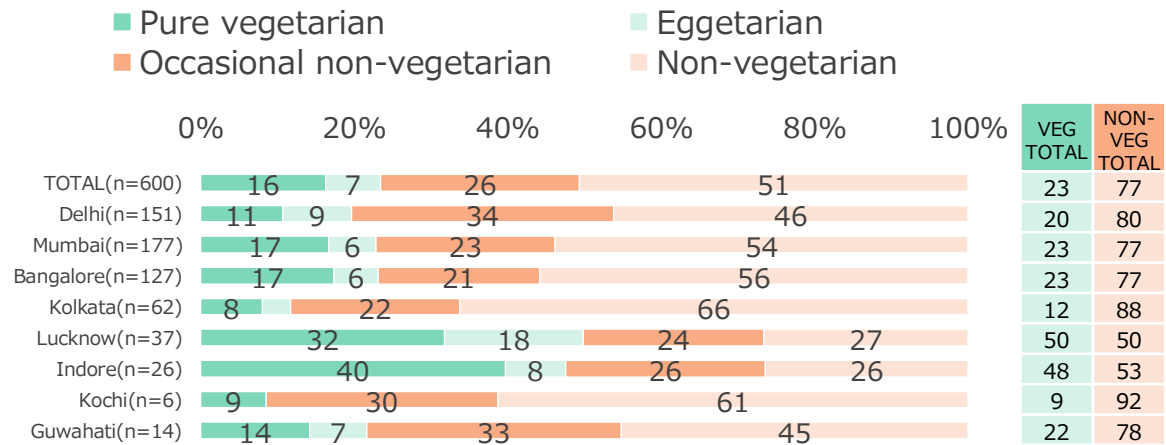
## Occupation



## Religion



## Food Habit



# General Food Habits in India

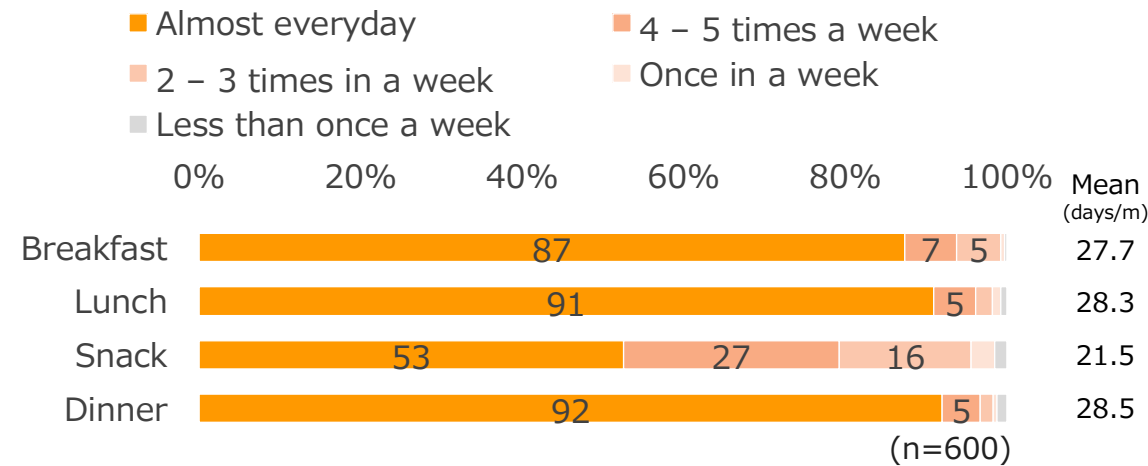
# Frequency of each Meal / Situation

Overall

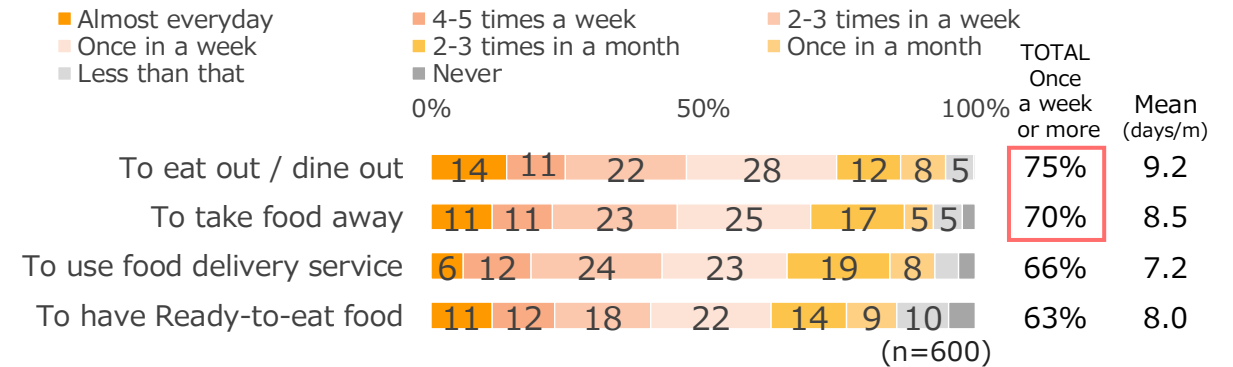
- Almost all Indian consumers have breakfast, lunch and dinner every day. As for snack, half of them have it everyday.
- Regarding to frequency of 'eat out' and take-away foods, more than 70% of them eat out / take food away once a week or more. Frequencies of food delivery service and RTE food is lower than the previous two situations.
- Overall, they enjoy all the 4 situations mainly with their family. However, they take foods away when they are with friends too while to have RTE food is when being alone as well.

(\*Values less than 5% are hidden)

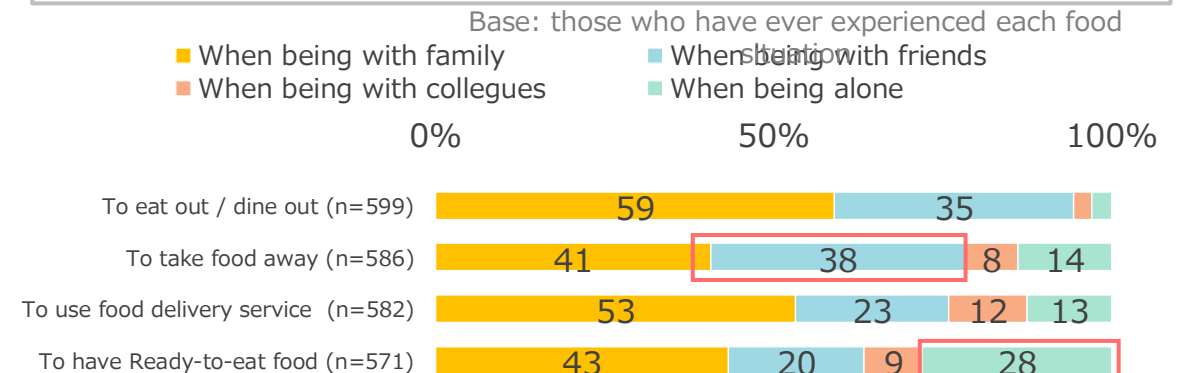
## Frequency of meal and snack



## Frequency of each situation



## Main occasion of each situation

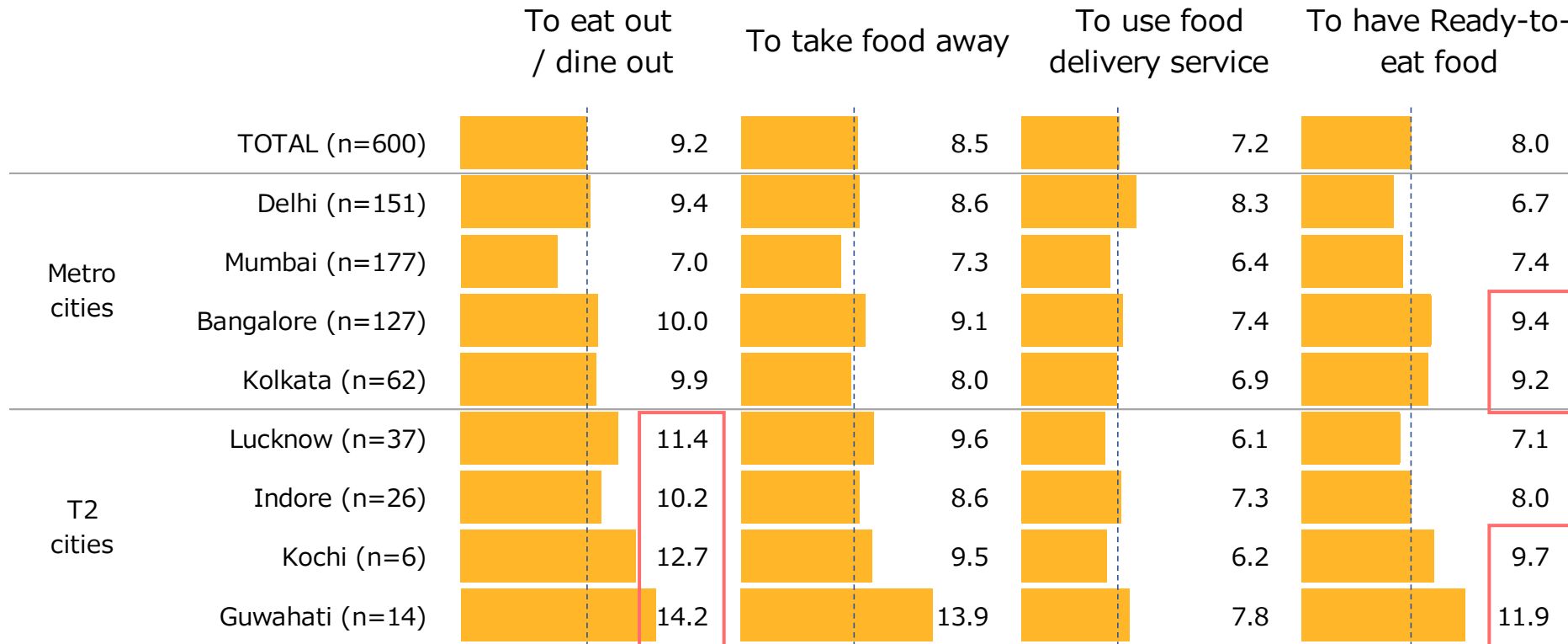


# Frequency of each situation

By City

- Comparing by city, people in T2 cities tend to eat/ dine out more frequently than it in metro cities
- Mean of having RTE food is higher in South and East cities than in North and West cities.

## Score: Mean (days/month)





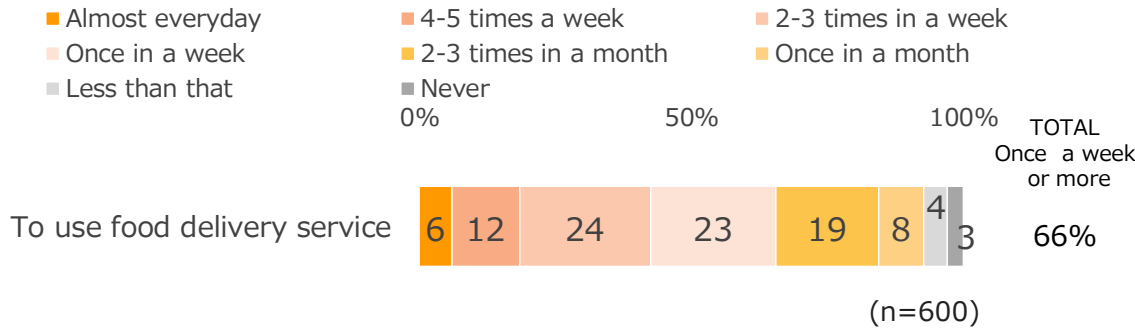


# Food delivery - Frequency and Occasions

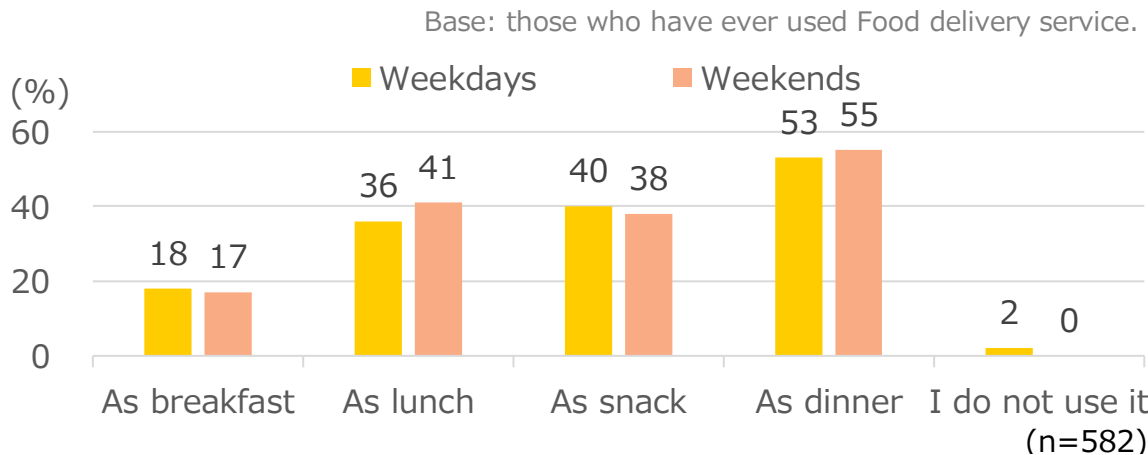
Overall

- 66 % of the Indian consumers order food delivery once a week or more and they do that in dinner time the most. There is not a big difference between weekdays and weekends.
- Food delivery service is more often used when they are craving for some specific food or have gatherings followed by when they do not feel like cooking or they feel tired.

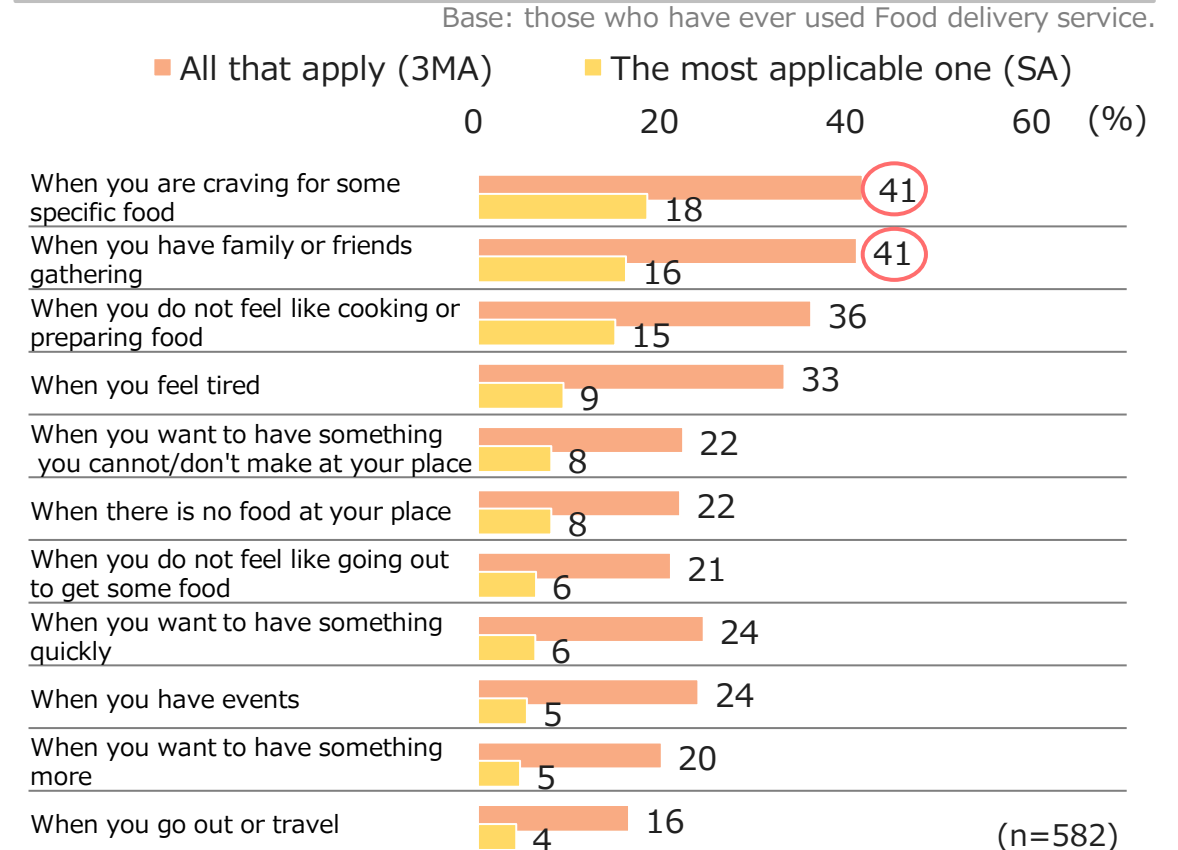
## Frequency



## When to use Food delivery service



## Occasions to use Food delivery service

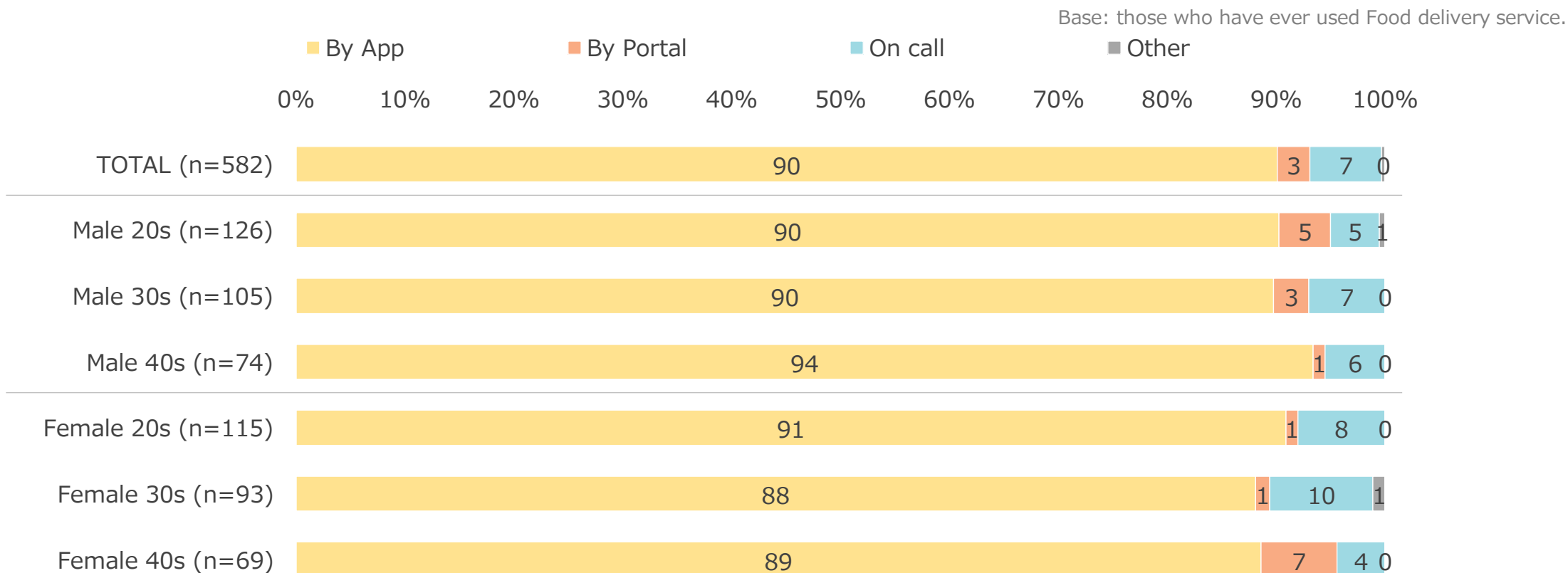




# Food Delivery –How to order

By Gender & Age

- 90% of Indian consumers use apps to order food delivery.
- There is not a big difference comparing by gender and age.

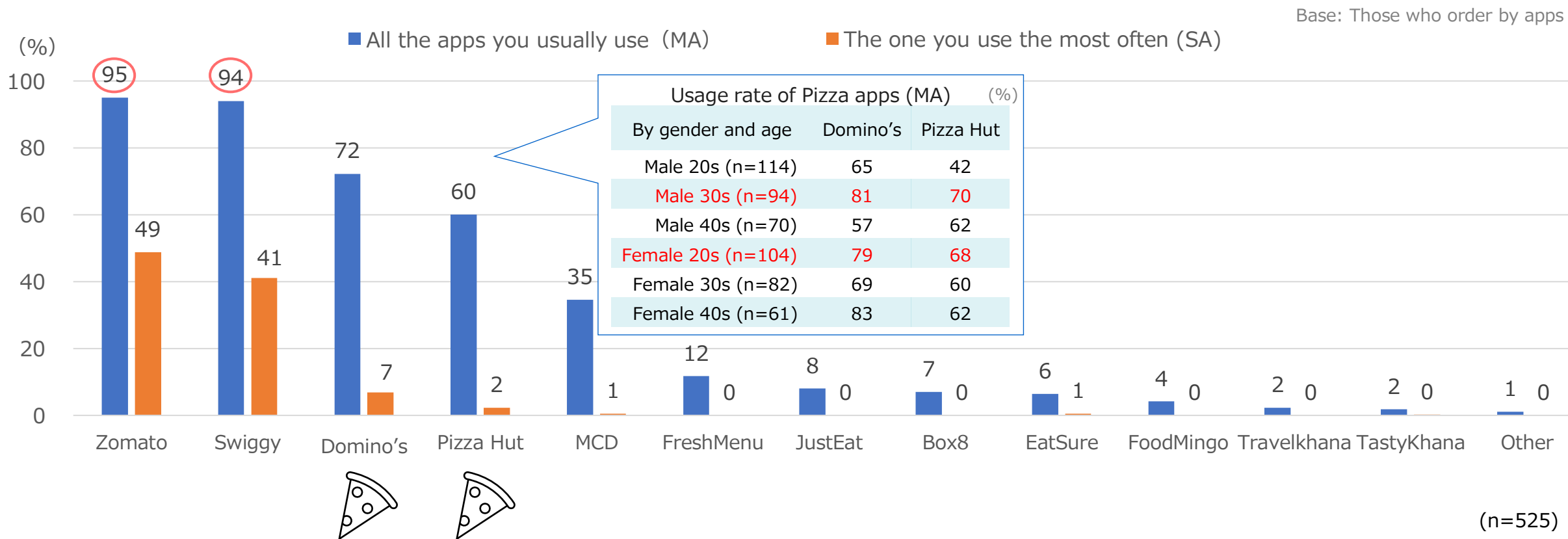




# Food Delivery –Using Apps to order

Overall

- Almost all the Indian consumers have Zomato and Swiggy to order food delivery, both of which are multinational restaurant aggregators. Pizza delivery apps such as Domino’s and Pizza Hut comes on 3<sup>rd</sup> and 4<sup>th</sup>.
- As for usage rate of the pizza apps by gender and age, it is higher in male 30s and female 20s so they are more likely to order pizzas via app.



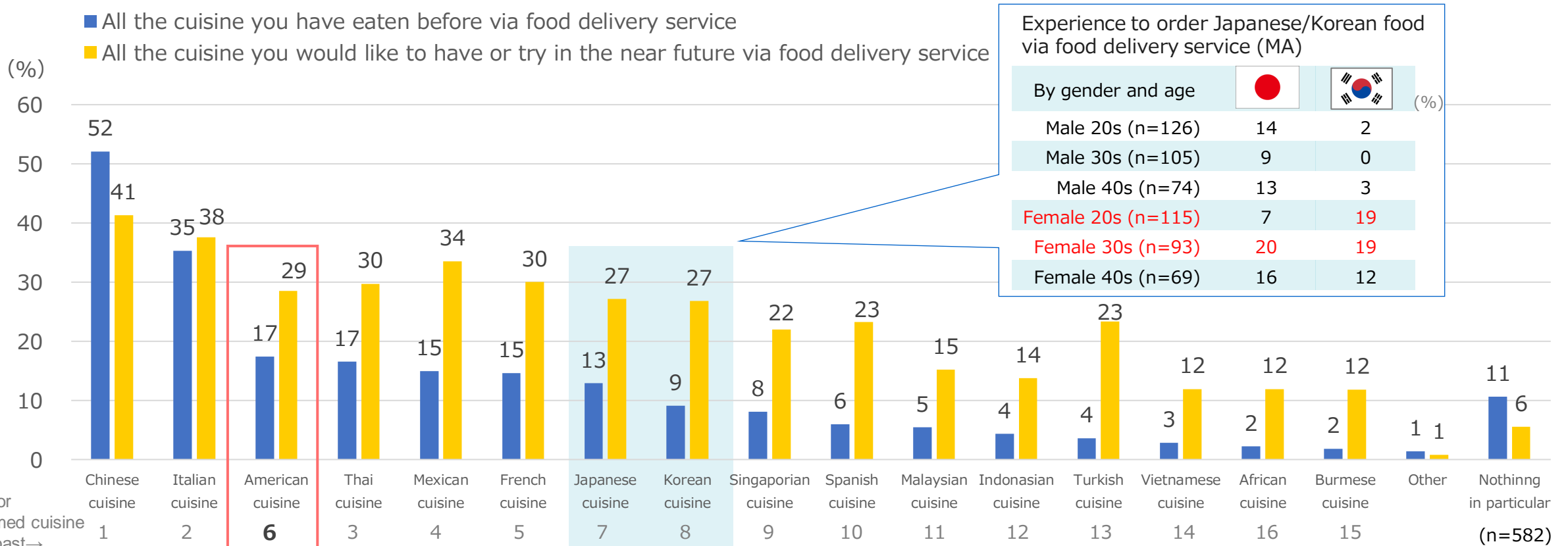


# Food Delivery - International Cuisine consumption and intention

Overall

- International cuisine that they have ever ordered via food delivery service is Chinese on the first and Italian on the second. As for the 3<sup>rd</sup>, it is American cuisine, which was on 6<sup>th</sup> about consumed cuisine in the past. So American cuisine looks popular in food delivery.
- Around 10% of the Indian consumers have ordered Japanese cuisine and Korean food as delivery. Order rate is higher in female 30s for Japanese, in female 20-30s for Korean, in which segments each consumption in the past 1 month were high as well.

Sorted by score of 'All the cuisine you have eaten before via food delivery service'



Rank for consumed cuisine in the past →  
\*Refer to page 37

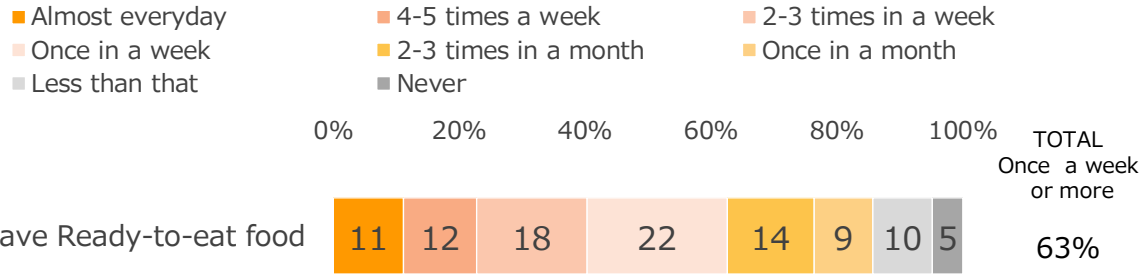


# Ready-to-Eat Food - Frequency and Occasions

Overall

- 63% of the Indian consumers have RTE food once a week or more and half of them eat it as breakfast or snack.
- They have RTE food when they want to have something quickly, feel tired, or do not feel like cooking or preparing food. This means that they are more likely to have RTE in terms of convenience.

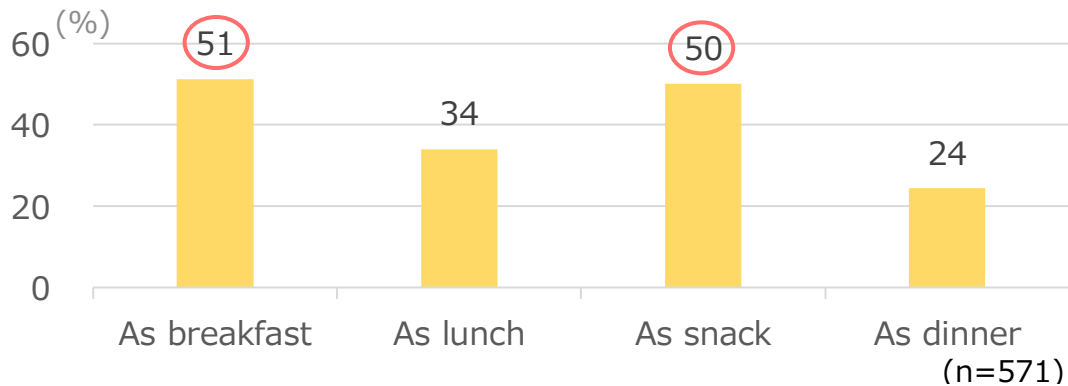
## Frequency



(n=600)

## When to have ready-to-eat food

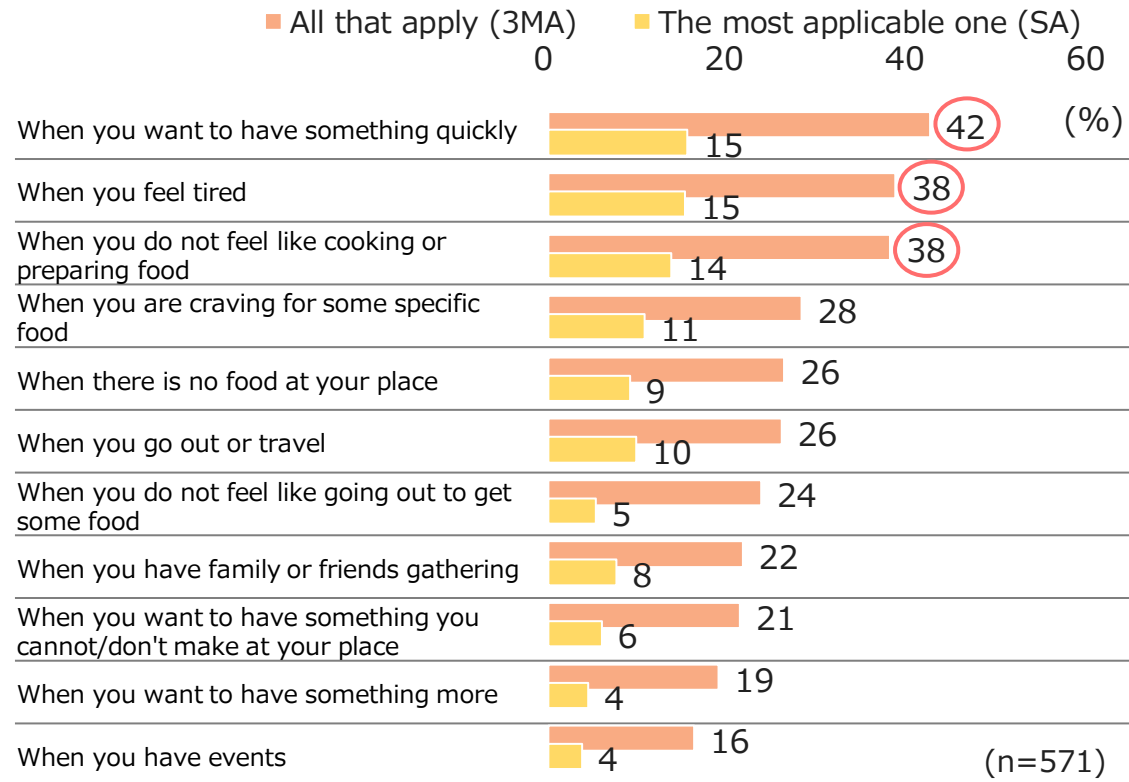
Base: those who have ever had ready-to-eat food.



(n=571)

## Occasions to have ready-to-eat food

Base: those who have ever had ready-to-eat food.



(n=571)

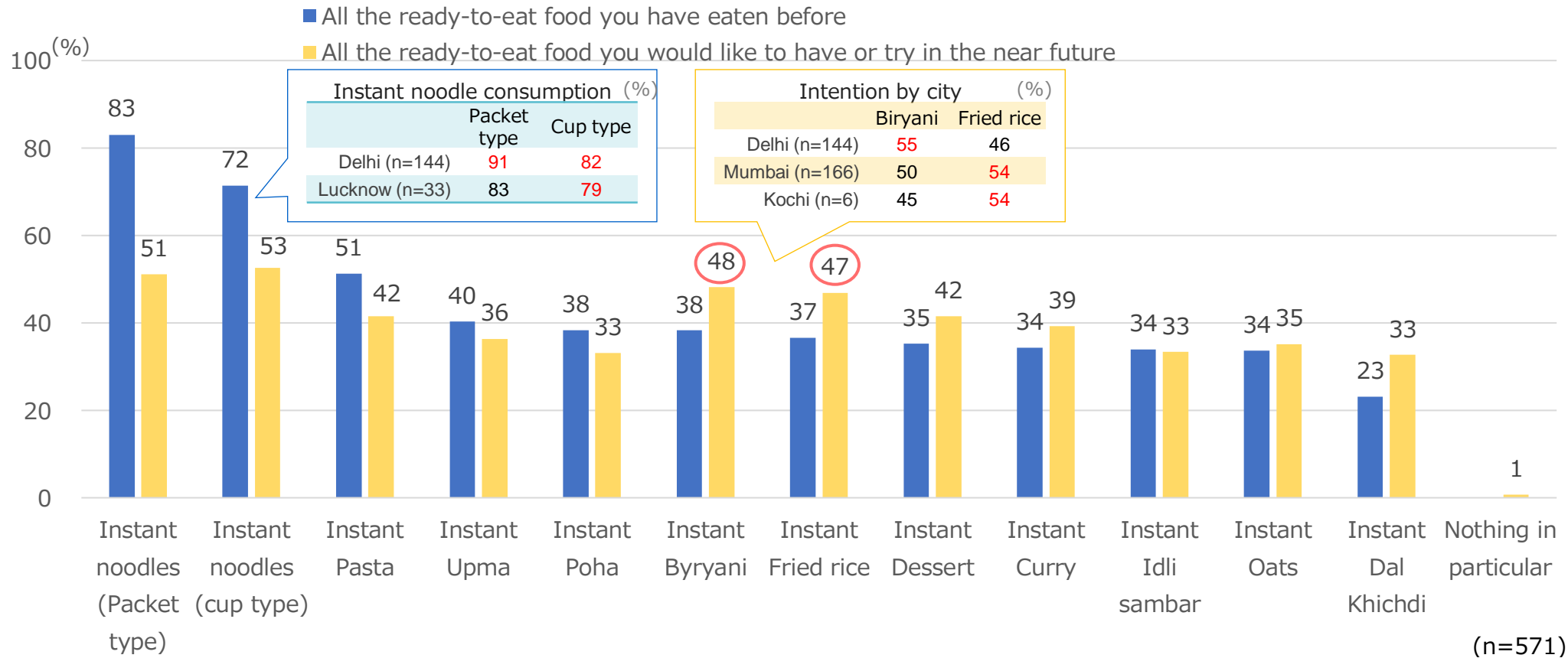


# Ready-to-Eat Food – Food Experience and intention

Overall

- Instant noodles ‘packet type’ and ‘cup type’ are consumed the most among those who have ever had RTE food before. Especially those who live in north part such as Delhi and Lucknow have highly consumption of cup type noodles.
- As for the future intention, rice category such as ‘instant Biryani’ and ‘instant fried rice’ is high compared to their consumption.

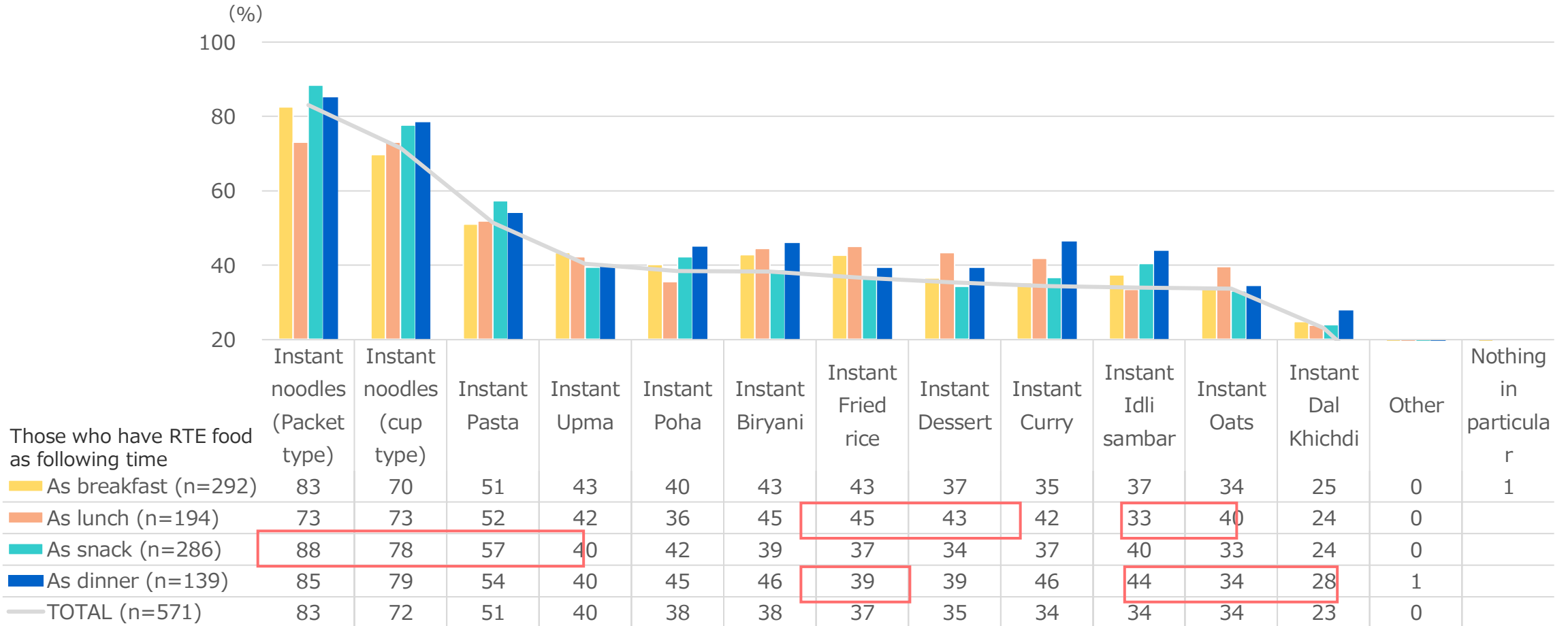
Base: those who have ever had ready-to-eat food.



# Ready-to-Eat Food - Food Experience × when to eat RTE foods

Overall

- Those who have RTE foods as lunch are more likely to have instant curry and rice categories such as Biryani and fried rice. On the other hand, those who have it as snack have more noodles/pasta categories.



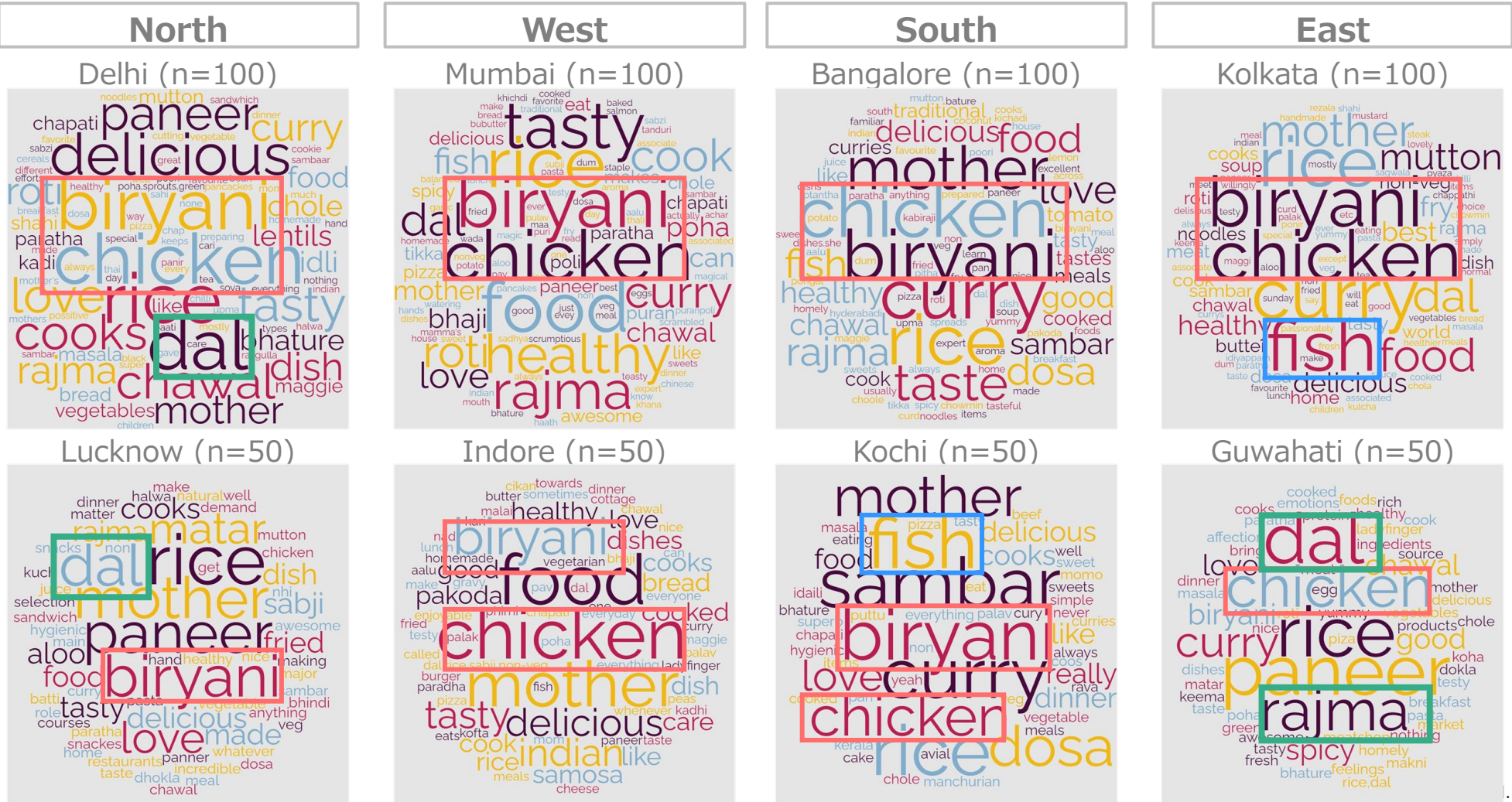




# Dishes Indian mothers cook 2/2

By City

- Overall, 'Chicken' & 'Biryani' across all the cities and zones are found as these are more common and predominant dishes their mother cooks the best for majority of them. On the other hand, pulses category dishes such as 'dal' and 'rajma' are mentioned mainly in North and East part. 'Fish' is mentioned a lot in Kochi and Kolkata, both of which are cities along with sea or rivers.

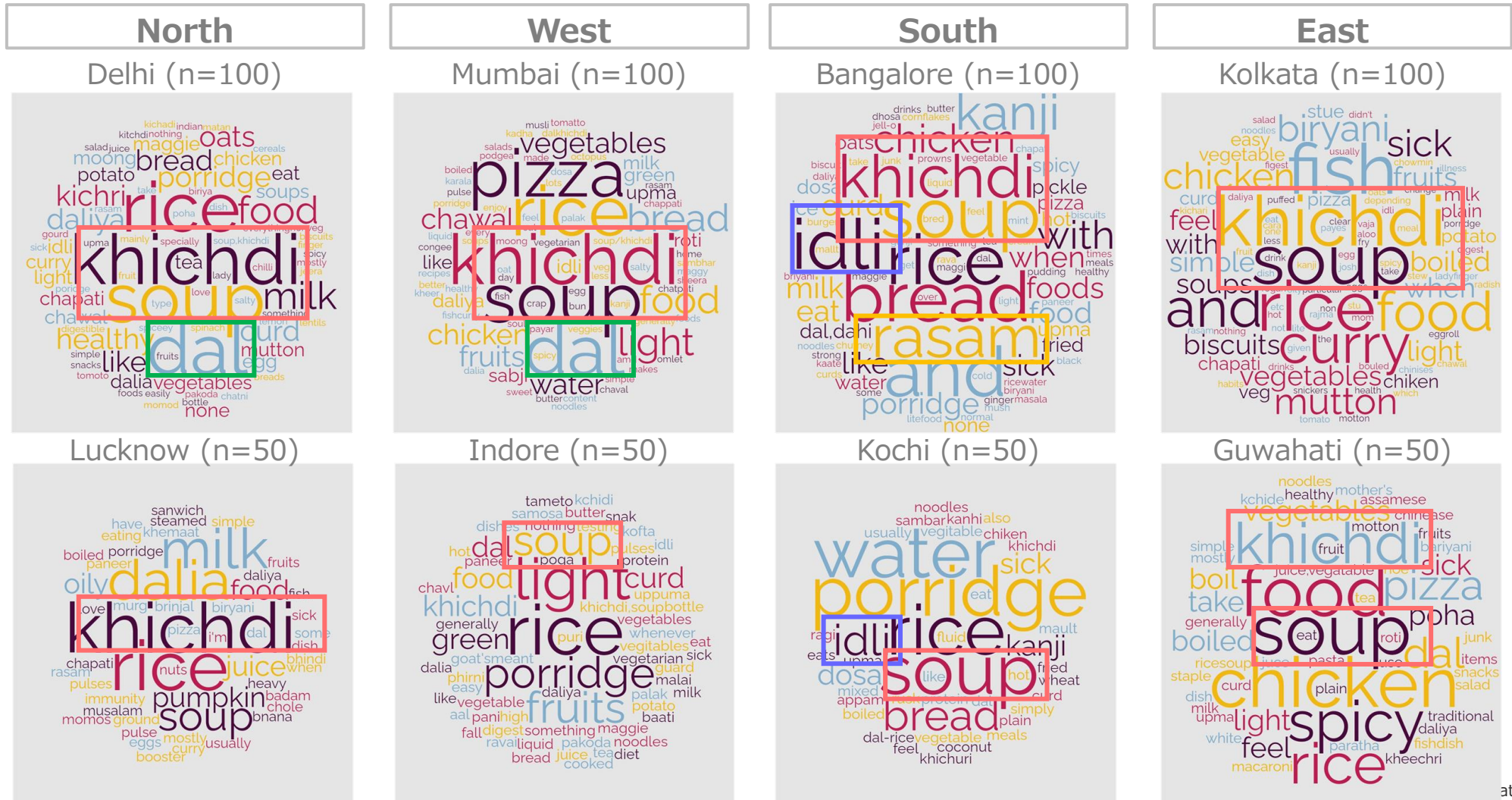




# Foods/dishes when feeling sick 2/2

By City

- Overall, 'khichdi' and 'soup' are found across all the cities and zones.
- As characteristics by city and zones, 'dal' is had in Delhi and Mumbai whereas 'idli' and 'rasam' are consumed in South zone.



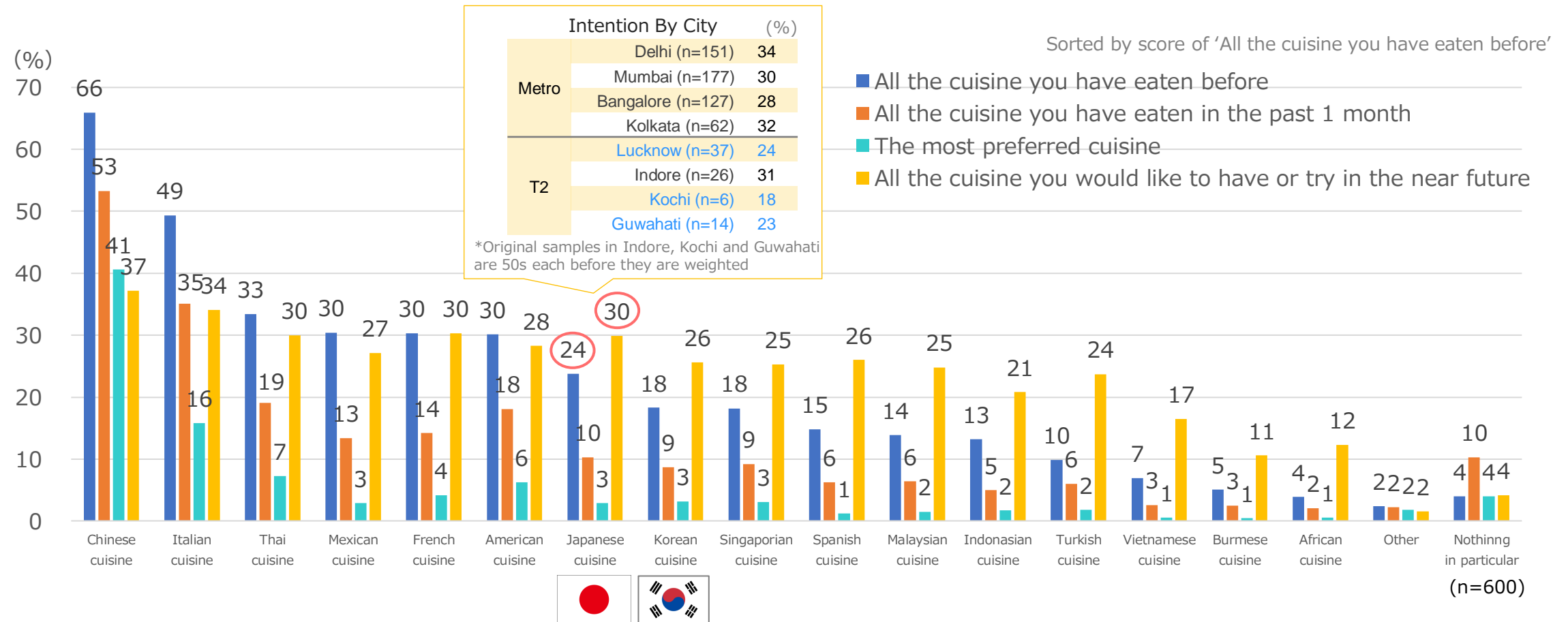


# International cuisine consumption

# International Cuisine Consumption

Overall

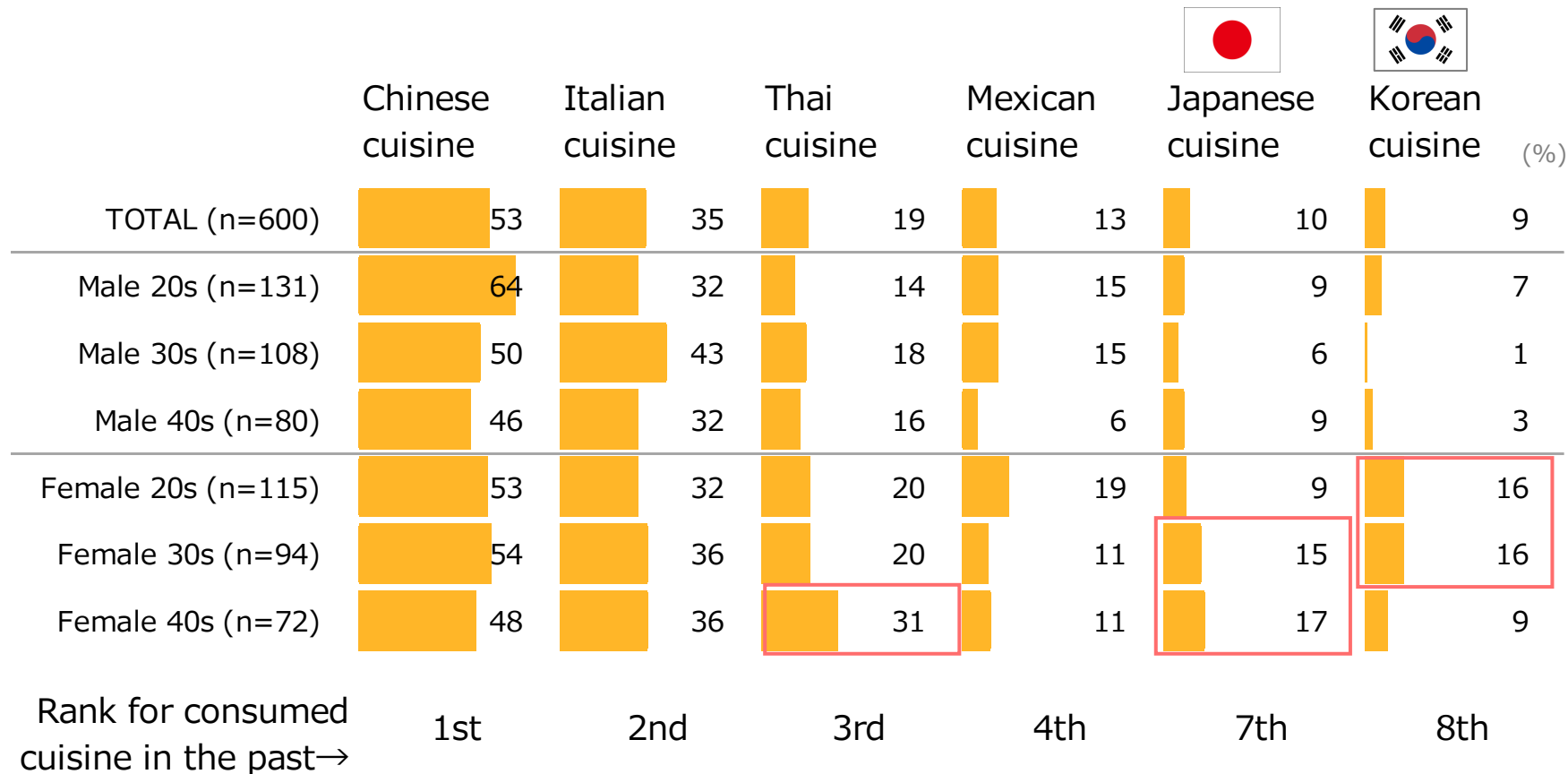
- Chinese cuisine is the most consumed one in the past. Italian comes on second and Thai is on 3<sup>rd</sup>.
- Consumption of Japanese cuisine is on the 7<sup>th</sup> and slightly higher than Korean. Future intention to have Japanese cuisine is 30% ,which looks higher than the other countries considering the consumption rate. Also, it is more likely to be higher in Metro cities than T2 cities.



# International Cuisine Consumption in the past 1 month

By Gender & Age

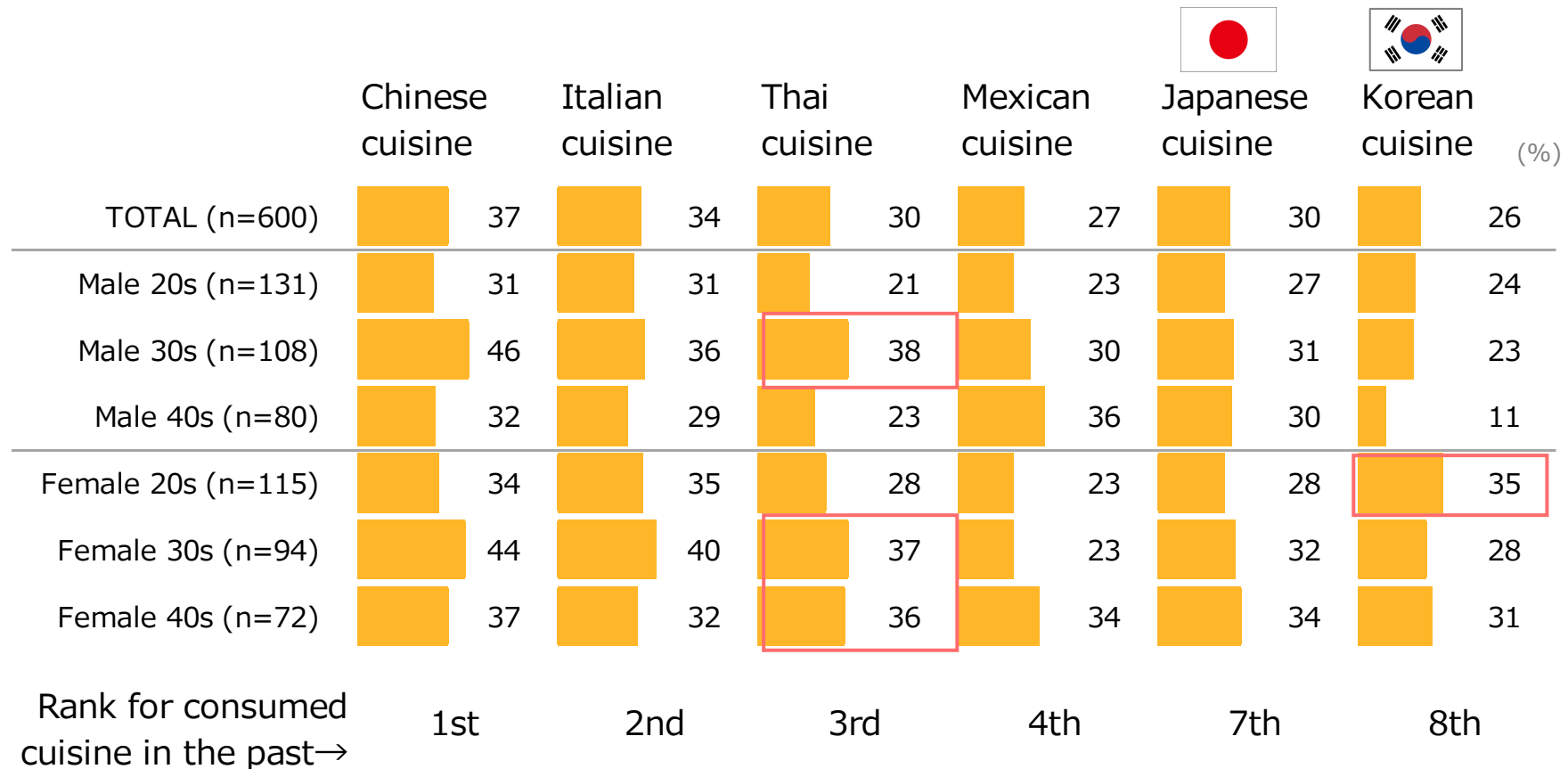
- By gender and age, Chinese cuisine and Italian cuisine were consumed in the last 1 month over all gender and age.
- On the other hand, there are differences by segments for Thai, Japanese and Korean. Thai was more consumed by female 40s, Japanese was by female 30-40s and Korean was by 20-30s.



# International Cuisine future intention

By Gender & Age

- Future intention toward Thai food is higher in male 30s and female 30-40s than in the other segments.
- Regarding to Korean cuisine, female 20s who consumed it in the past 1 month, has higher intention.
- As for Japanese cuisine, there is not big difference by gender and age.

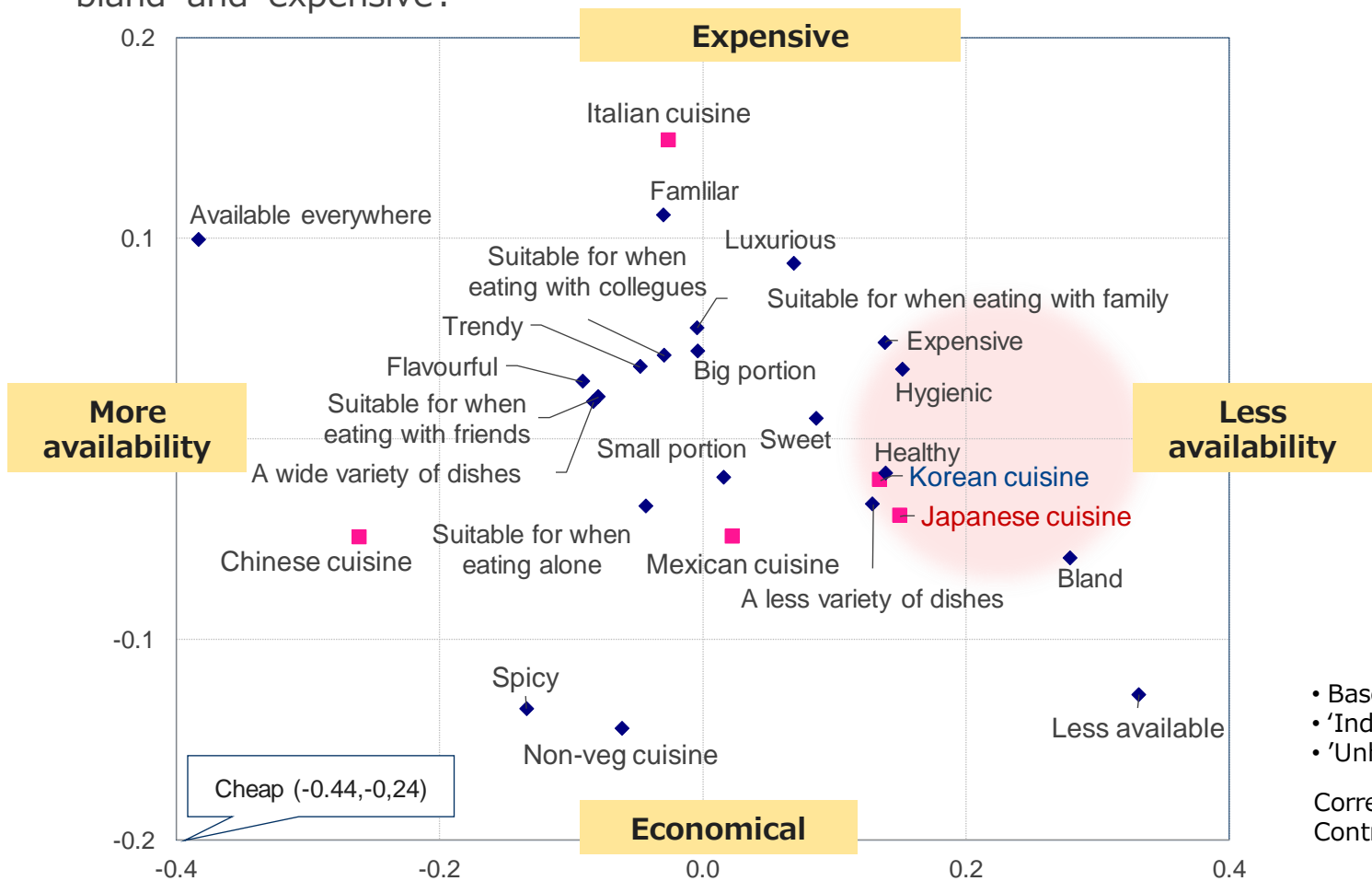




# Images towards international cuisines

Overall

- The image towards each international cuisine was broadly divided into 'more availability' ⇔ 'less availability,' and 'expensive' ⇔ 'economical'.
- Japanese and Korean cuisine was placed in less availability and those images are almost the same; 'healthy', 'hygienic', 'bland' and 'expensive'.



- Base: ALL
- 'Indian cuisine' was excluded.
- 'Unhealthy' was excluded as it was placed far from the other images.

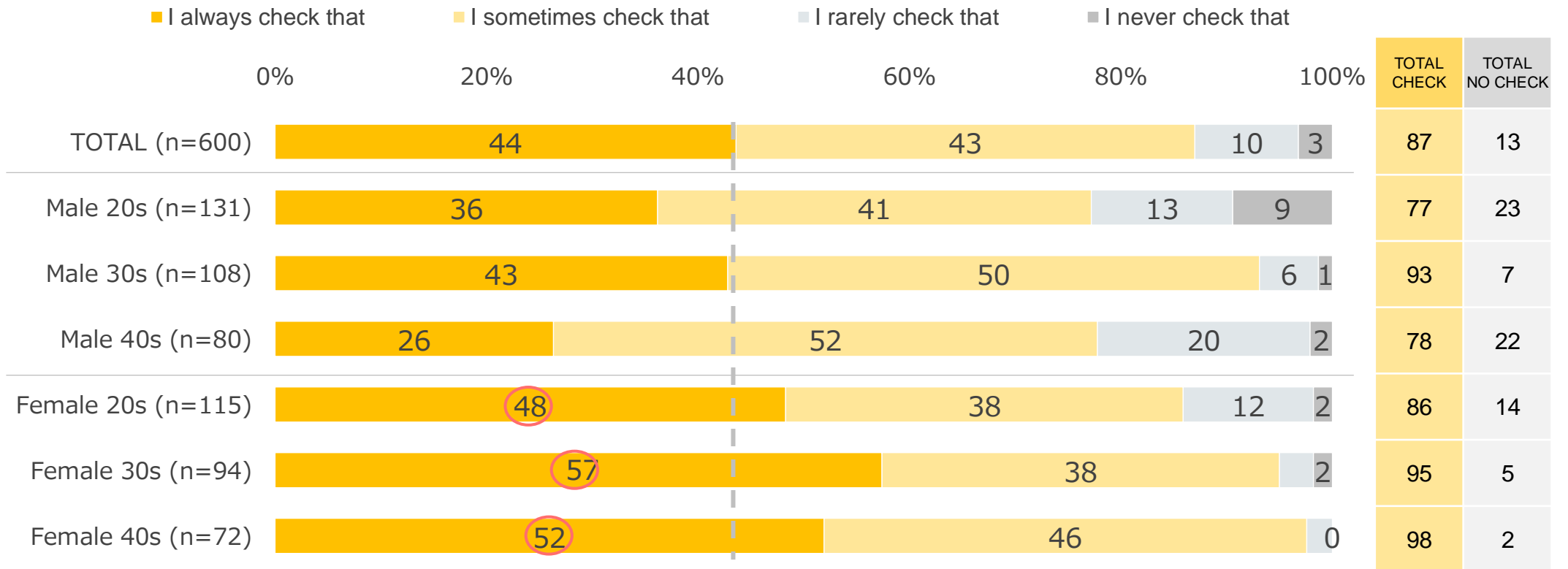
Correspondence Analysis - Contribution ratio  
Contribution rate: X-axis: 0.71, Y-axis: 0.19

# Nutrient consciousness

# Consciousness of nutrients on package

By Gender & Age

- 44% of the Indian consumers answered 'I always check nutrients on package' when buying food .
- Female is more conscious of nutrients than male.

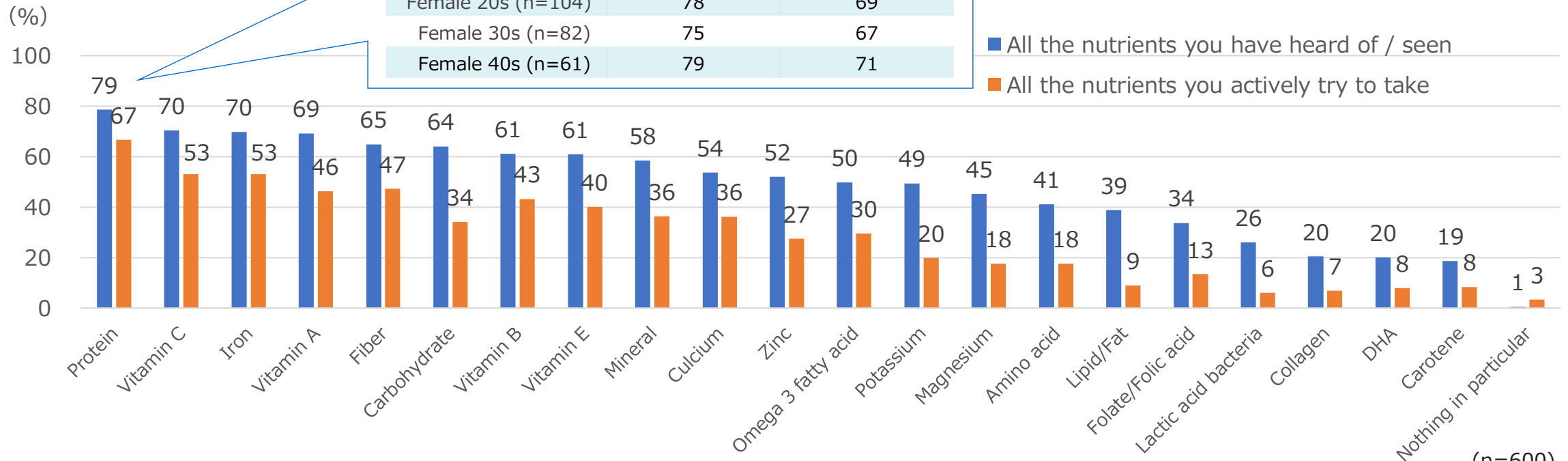


# Awareness of nutrients / proactively consumed ones

Overall

- Regarding to awareness of nutrients, 'protein', 'vitamin A/C' and 'iron' are well known.
- Almost 70% of them proactively consume 'protein'. Especially its score is prominent in male 30s.

By gender and age	Those who are aware of it	Those who actively try to take it
Male 20s (n=114)	73	62
<b>Male 30s (n=94)</b>	<b>84</b>	<b>72</b>
Male 40s (n=70)	84	62
Female 20s (n=104)	78	69
Female 30s (n=82)	75	67
Female 40s (n=61)	79	71

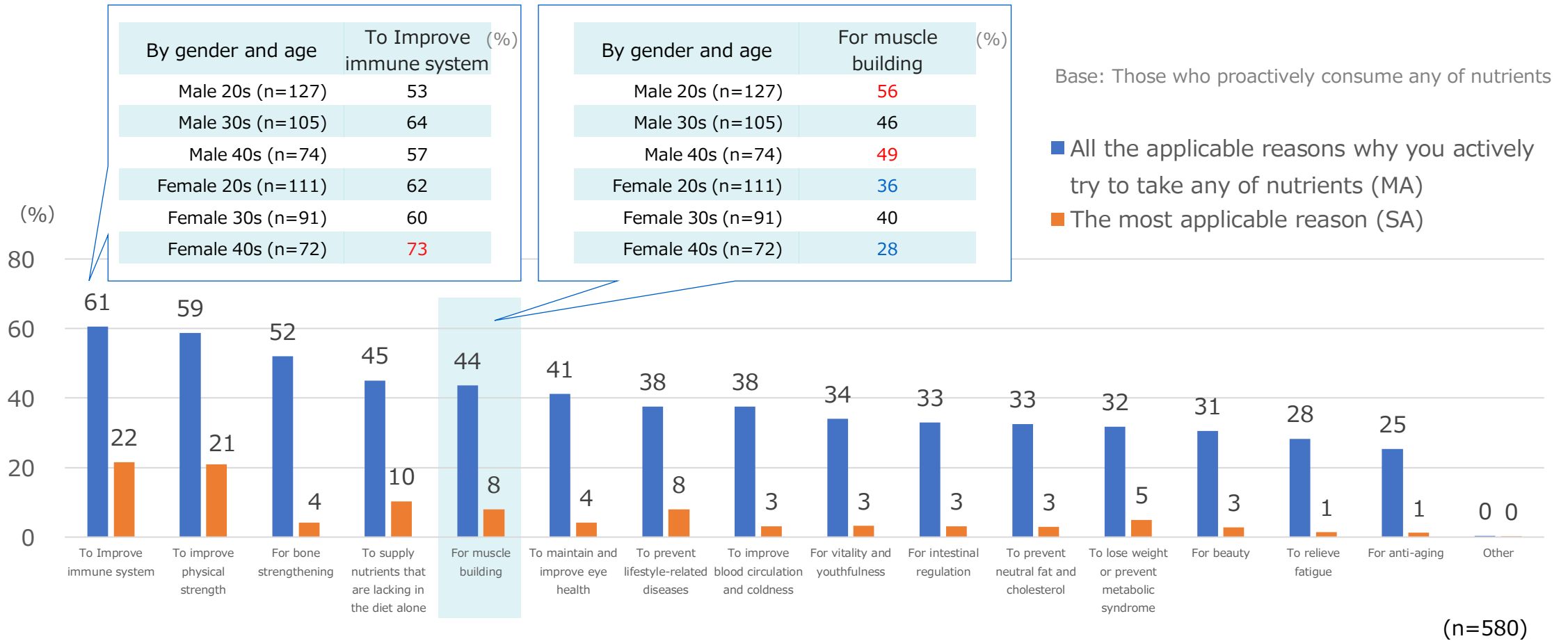


(n=600)

# Reasons for proactively consuming nutrients

Overall

- Main reasons why Indian people proactively consume any of nutrients are to strengthen 'immune system' and 'physical strength', which seems that they feel good nutrients can lead to 'their whole-body health care'.
- As for immune system, it is higher in female 40s. Male is more likely to take nutrients for muscle building than female.



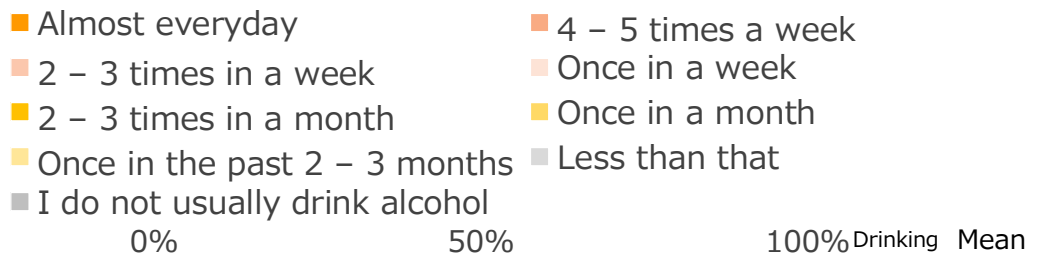
# Alcohol consumption

# Alcohol consumption

- Overall, almost 70% of the Indian consumers drink alcohol. Male is likely to drink more than female and a drinking rate especially in male 30s is 84% which is the highest among all gender and age groups.
- As for consumed alcohol categories, beer is the highest. Whisky comes on second and wine is on the 3<sup>rd</sup>. By gender, male is more likely to have beer and whisky while female tend to have wine as well.

## Frequency of drinking

(\*Values less than 5% are hidden)



Drinking Rate(%) Mean (days/m)

67	4.6
60	4.1
84	5.9
75	4.8
60	3.6
66	5.4
61	3.6

## Consumed Alcohol categories

Base: Those who usually drink any of alcohols

	Rank	(%)		Rank	(%)
TOTAL (n=405)	1. Beer	66	By gender and ages	Rank	(%)
	2. Whisky	57			
	3. Wine	48			
	4. Vodka	44			
	5. Rum	34			
Male 20s (n=79)	1. Beer	69	Female 20s (n=69)	1. Wine	61
	2. Whisky	63		2. Beer	58
	3. Vodka	54		3. Vodka	49
Male 30s (n=91)	1. Whisky	73	Female 30s (n=62)	1. Beer	68
	2. Beer	66		2. Vodka	45
	3. Wine	54		3. Whisky	43
Male 40s (n=60)	1. Beer	81	Female 40s (n=44)	1. Wine	57
	2. Whisky	72		2. Beer	51
	3. Wine	40		3. Vodka	45

# Alcohol consumption

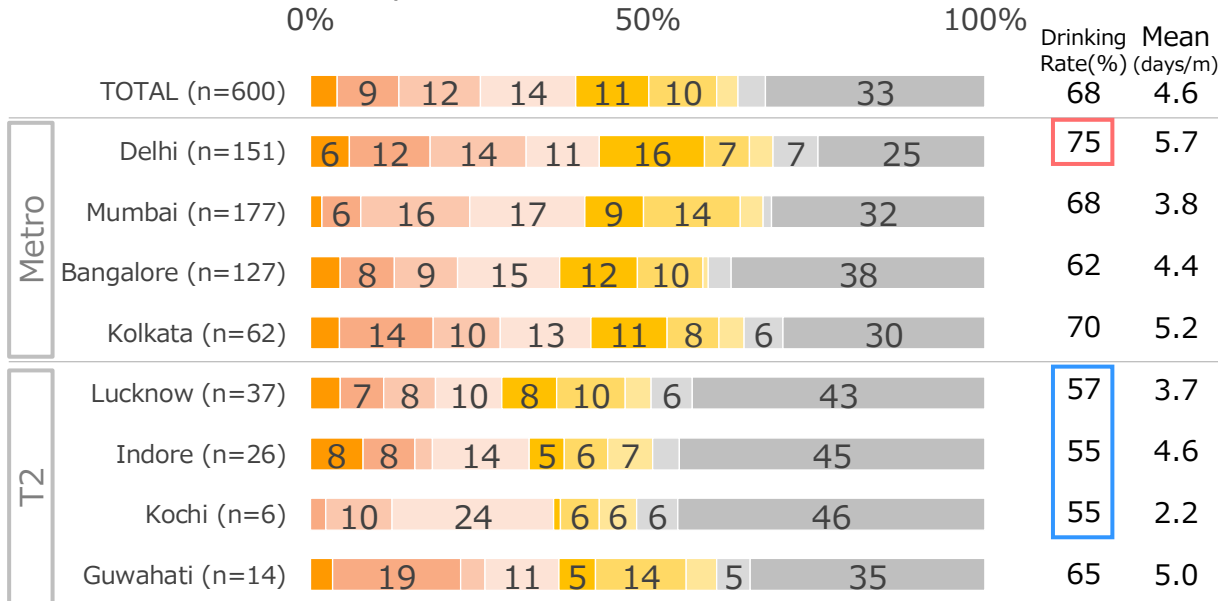
By City

- Drinking rates in metro cities are higher than the ones in T2 cities .
- In Kolkata, whisky is consumed more than beer. Rum comes on the 3<sup>rd</sup>.

## Frequency of drinking

(\*Values less than 5% are hidden)

- Almost everyday
- 2 – 3 times in a week
- 2 – 3 times in a month
- Once in the past 2 – 3 months
- I do not usually drink alcohol
- 4 – 5 times a week
- Once in a week
- Once in a month
- Less than that



## Consumed Alcohol categories

Base: Those who usually have each drink alcohol

	Rank	(%)		Rank	(%)
TOTAL (n=405)	1.Beer	66			
	2.Whisky	57			
	3.Wine	48			
	4.Vodka	44			
	5.Rum	34			
By city	Rank	(%)	By city	Rank	(%)
Delhi (n=114)	1.Beer	59	Lucknow (n=21)	1.Beer	58
	2.Whisky	54		2.Whisky	52
	3.Wine	43		3.Wine	50
Mumbai (n=121)	1.Beer	74	Indore (n=14)	1.Vodka	72
	2.Whisky	61		2.Beer	71
	3.Vodka	52		3.Whisky	57
Bangalore (n=79)	1.Beer	70	Kochi (n=3)	1.Beer	63
	2.Wine	64		2.Vodka	29
	3.Whisky	54		3.Rum/Wine	29
Kolkata (n=43)	1. <b>Whisky</b>	<b>67</b>	Guwahati (n=9)	1.Beer	59
	2.Beer	56		2.Whisky	48
	3. <b>Rum</b>	<b>41</b>		3.Wine	46

\*Grey out: Samples in Indore and Kochi are less than 30s before they are weighted.

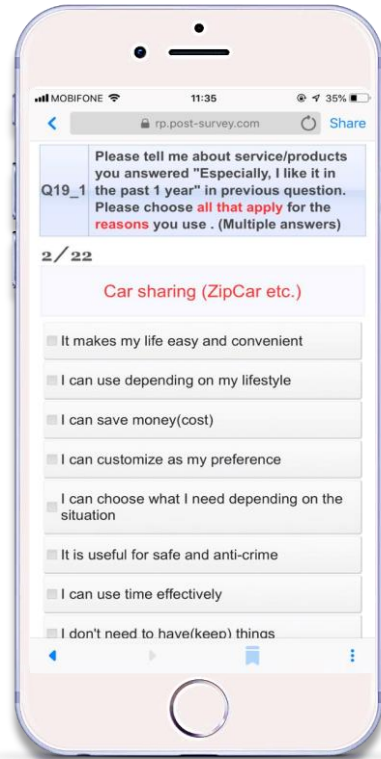
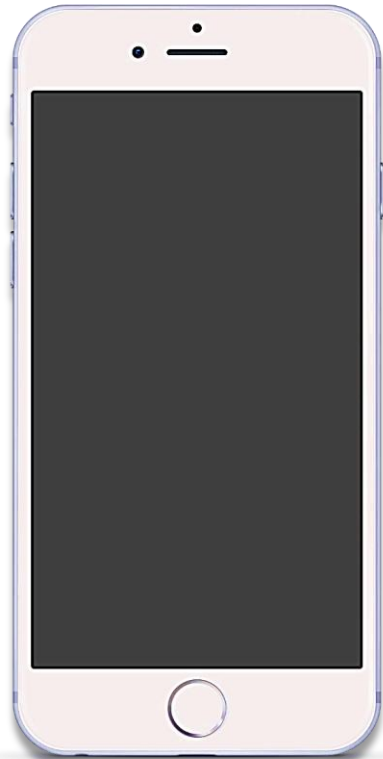


# **Appendix: Intage's Online Research Panel**

# Asian Panel (AP) : INTAGE's Online Research Panel (Online Survey)

## Asian Panel

Quick and Decisive Insights



Strong community with more than 9 millions users+ in Asia.



User-friendly interface.  
Quick access to the survey anywhere at anytime.



Fast & reasonable price for all processes



Various types of information can be collected (photo, video, etc.)



# COVERAGE

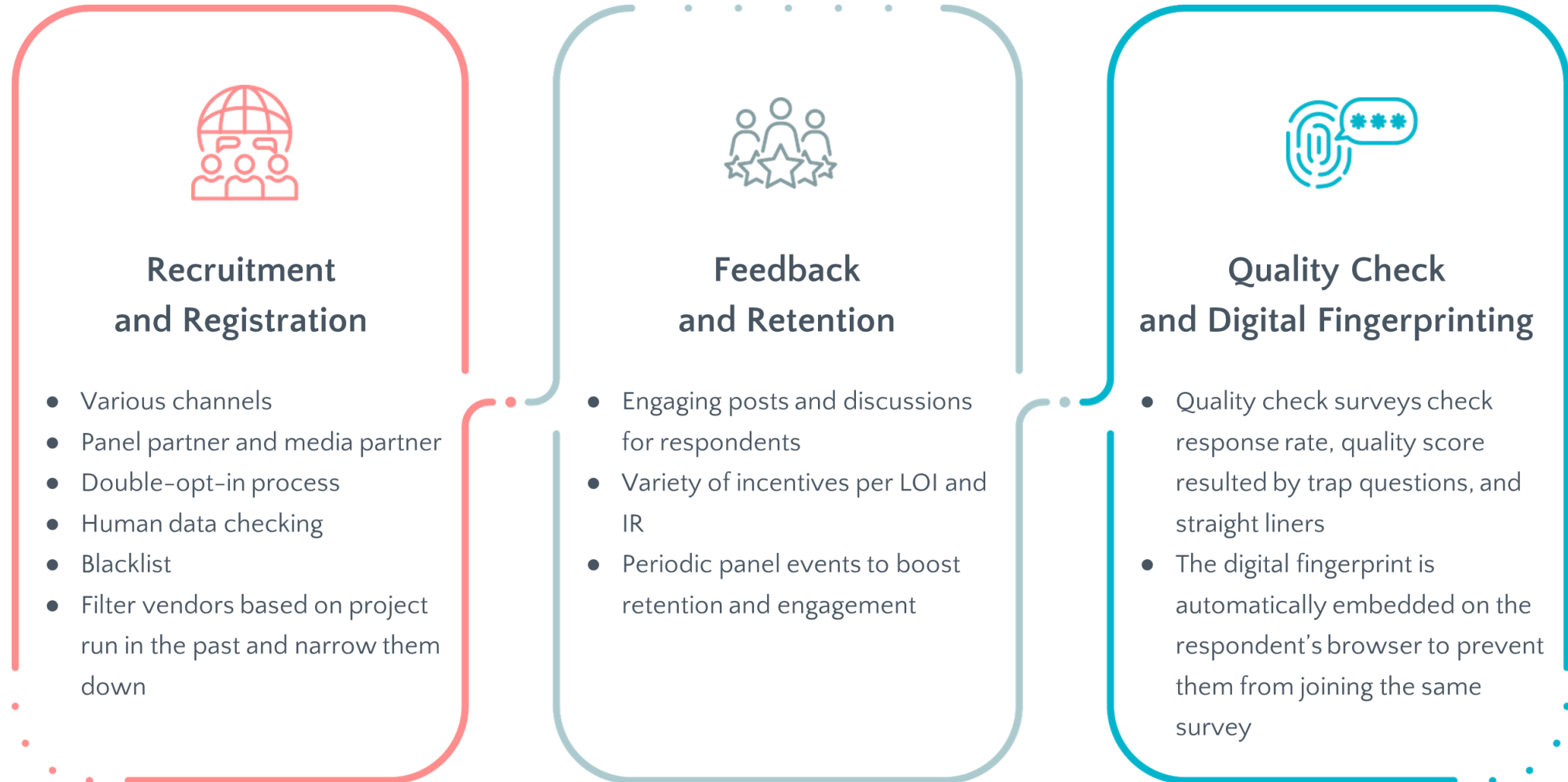
Extensive coverage and detailed profiling for your Asian research needs.  
Our panels are always growing!

MARKET	PANEL SIZE
JAPAN	2,739,841
CHINA	4,091,768
KOREA	369,478
SINGAPORE	122,337
INDONESIA	1,907,299
THAILAND	1,549,855

MARKET	PANEL SIZE
VIETNAM	871,253
TAIWAN	415,749
HONG KONG	21,186
MALAYSIA	331,879
PHILIPPINES	555,703
INDIA	124,715

# QUALITY CONTROL (1/2)

INTAGE applies the following standards to ensure quality data:



# QUALITY CONTROL (2/2)



## Panel Recruitment Management

- Maintain a representative online population by recruiting panelists through diverse routes: online advertising on local websites such as search engines, social networks, and online shopping sites
- Verify user's mobile phone and email address verification at the sign-up stage
- Analyze the access/usage log within one month after signing up



## Detailed Panel Profiles

- 47 detailed profile questions at one-month/six-month/12-month intervals
- Profiles are updated with the latest information every month, like smartphone model details



## Panel Activity Management

- Increase loyalty to panel website/mobile app access and activities through Daily Quickpoll
- Increase activity by rewarding panelists who complete surveys
- Open monthly event for all panels and specific ages



## Data Quality Management

- Conduct a Tutorial Survey which educates panelist on precautions in online survey responses
- Minimize bad samples by reviewing the survey logic
- Send the notice/alert email to bad samples. Eliminate the panelists after three flags

# INTAGE Group

**INTAGE Group is the Asia leading provider** of market information and consumers' understanding, which has global capabilities with market access practice across 10+ countries that enables us to provide clients with the most complete and comprehensive view of market & consumers.



**No.1**

Market Leader in Asia



**60+ years**

Experience



**10+**

Countries & Regions

# Thank you!



**INTAGE INDIA Pvt. Ltd.**

[Contact]  
[info@intageindia.in](mailto:info@intageindia.in)