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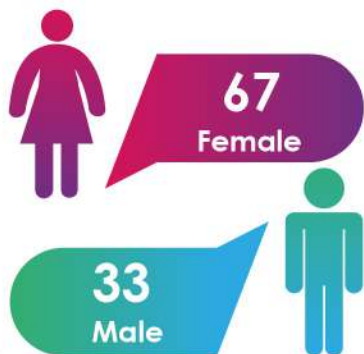
DAILY DIPSTICK 'HEAT AND EAT'
Syndicated Study

ISO 9001:2015 & 27001:2013 Certified

Scale-up

Demographic Profiling (1)

GENDER



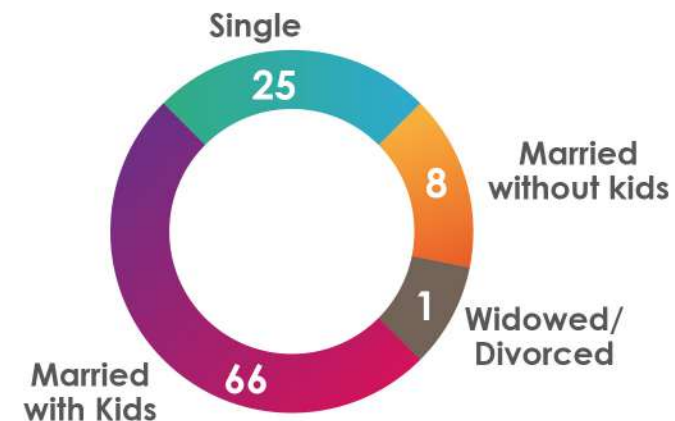
A1. Please choose your gender.

AGE



A2. Could you please mention your age as completed on your last birthday?

LIFE STAGE



A6. There is a list of options on Life stage now. Please choose the one which best describes your current life stage.

CITIES



A3. Please choose the city where you are currently living.

EDUCATION

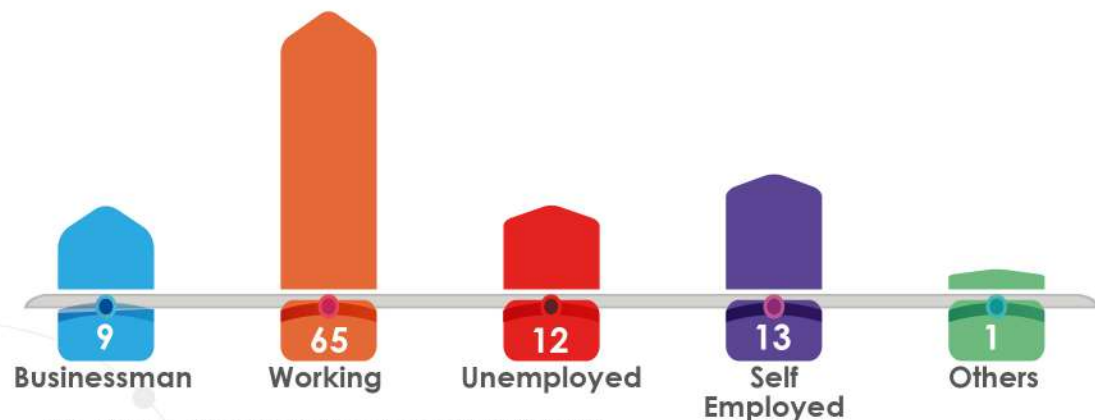


A5. Please choose the highest level of education completed by you on basis of the standard list displayed below.

All fig in % except base
Base: 2,000

Demographic Profiling (2)

OCCUPATION



A4. Please choose your occupational status.

NCCS



A8. You have mentioned your ___ to be the chief wage earner of your family.

Please specify his/her highest level of education.

A12. Which of these items do you have at home?

A10. Please choose which of the following best describes your net monthly household income.

A11. Please choose which of the following best describes your net monthly personal income.



All fig in % except base
Base: 2,000

Consumption of **Ready-to-Eat Food**

Last Consumption of 'Heat & Eat' Products

More than half the respondents claimed to have consumed a Ready-to-Eat (RTE) product within the last 2 weeks. So on an average an RTE product is consumed every fortnight. The consumption would obviously vary according to individual choices, however it is interesting that Females contribute more than males in RTE consumption.



Today



This week



Last week

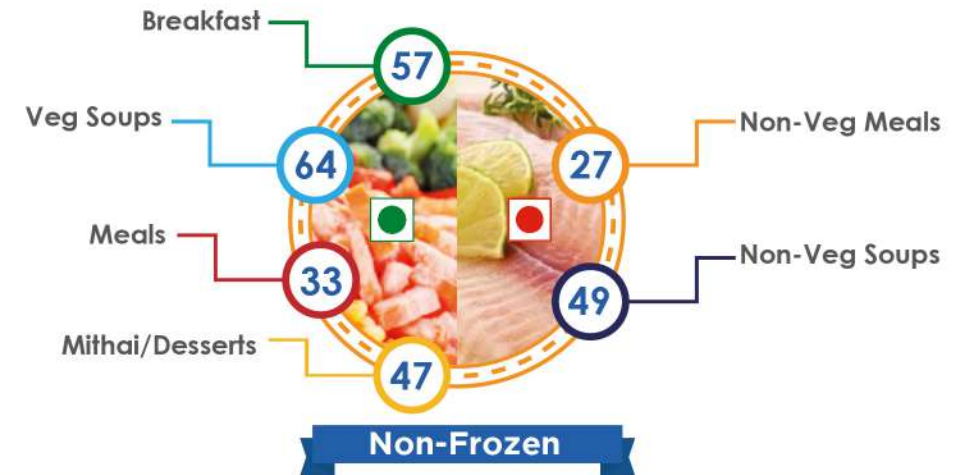


Last month



Last 3-6 months

B2. Could you tell us when was the last time you consumed any 'Heat & Eat' food products?



RTE is also seen more as a 'snack' rather than a 'meal'. So the market for the products is primarily in the convenience food space. This is corroborated by the high preference for 'soups' and lowest preference of a 'meal' amongst both veg/non-veg consumers.

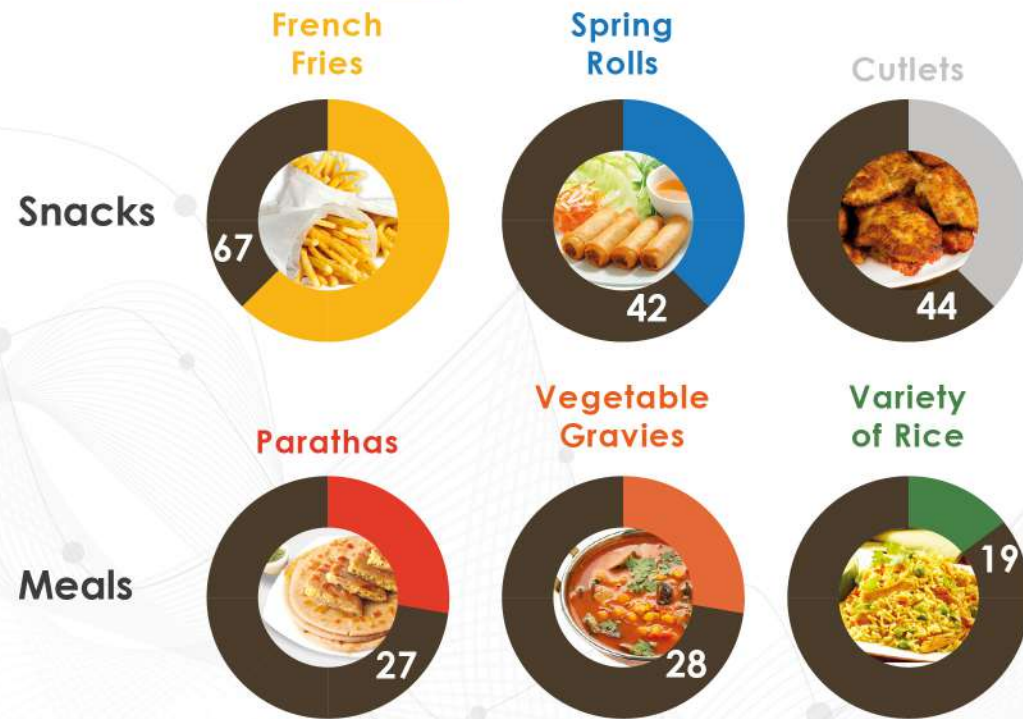
B3. Which of the 'Heat & Eat' product categories mentioned below have you purchased in the last 6 months?

All fig in % except base
Base: 2,000

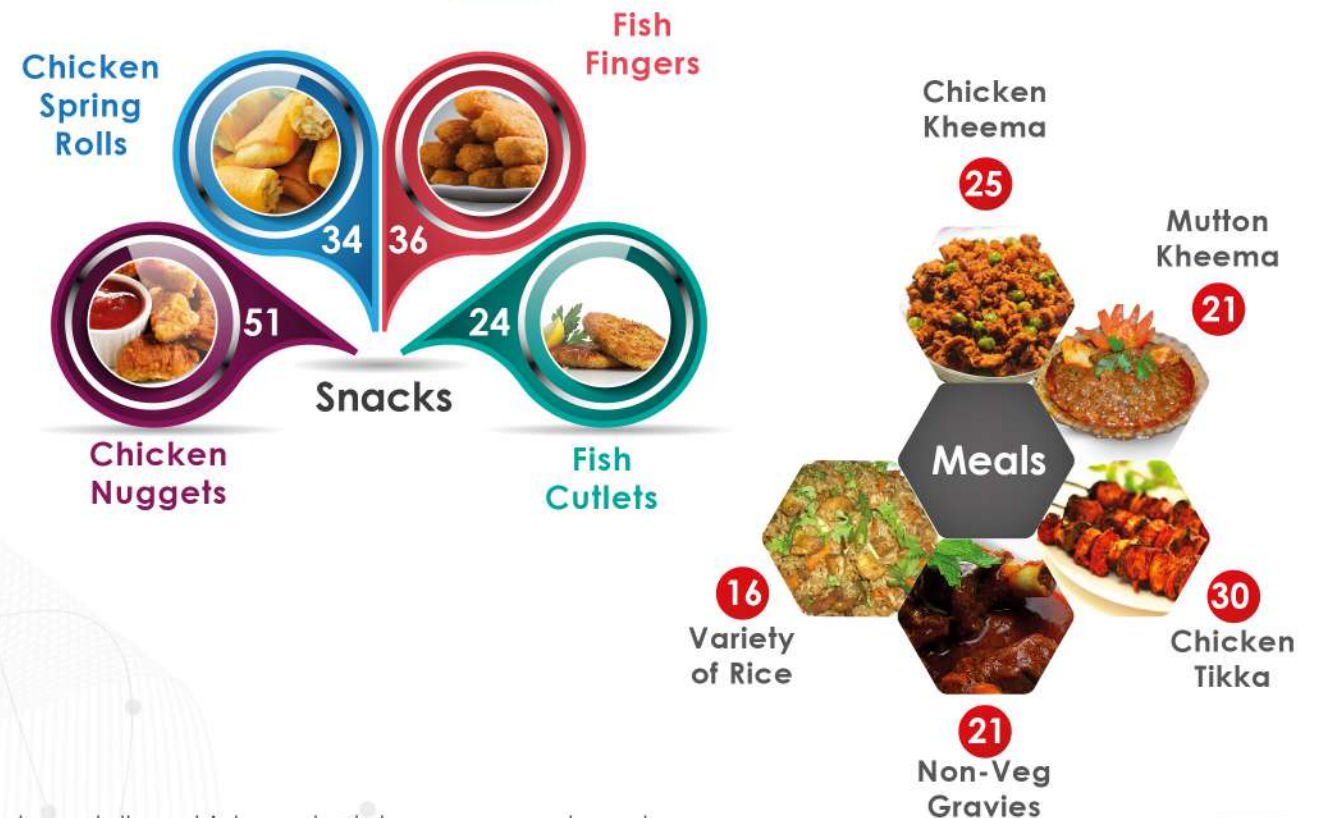
Frozen 'Heat & Eat' Food Products

A wide variety is available across both veg/non-veg products however, consumption more for veg items, which could be a function of preference rather than availability.

Vegetarian



Non-Vegetarian



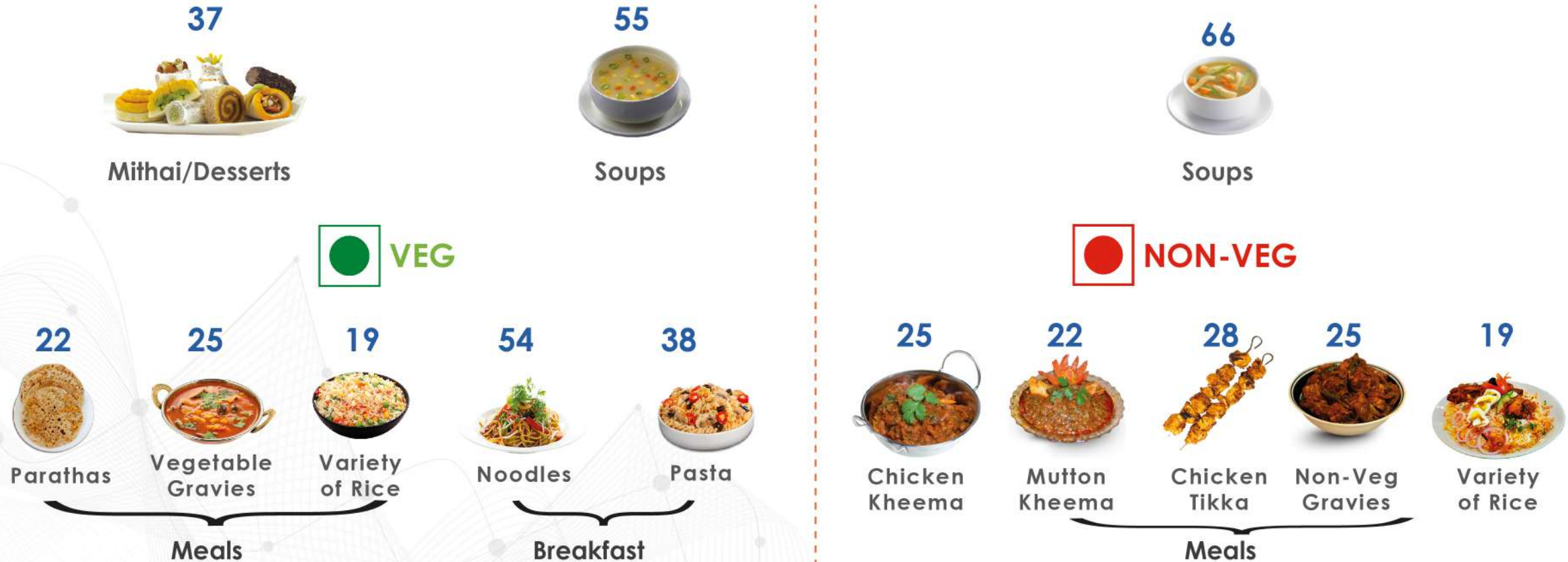
B4(a). Given below is a list of various VEG 'Heat & Eat' food products. Could you please tell us which products have you purchased in the last 6 months?

B4(b). Given below is a list of various NON-VEG 'Heat & Eat' food products. Could you please tell us which products have you purchased in the last 6 months?

All fig in % except base
Base: B4(a): 2,000 & B4(b): 1,400

Non-Frozen 'Heat & Eat' Food Products

Despite the various options available for satiating individual palettes, the consumption preference certainly leans towards snack items.

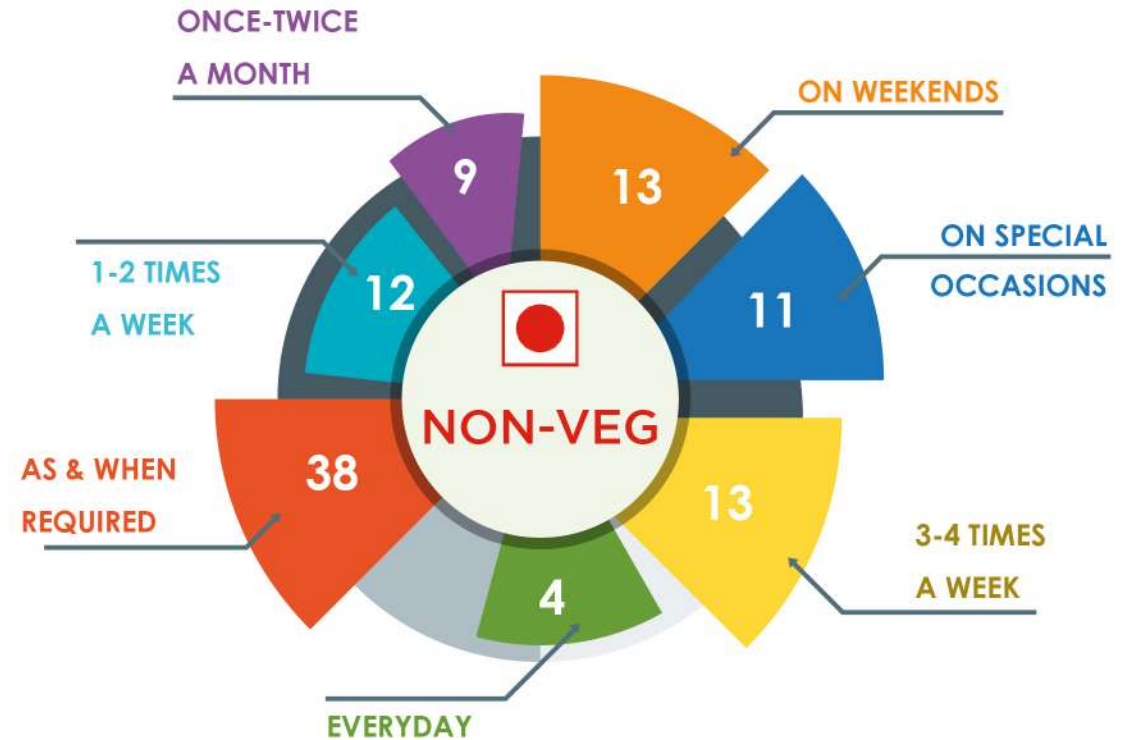
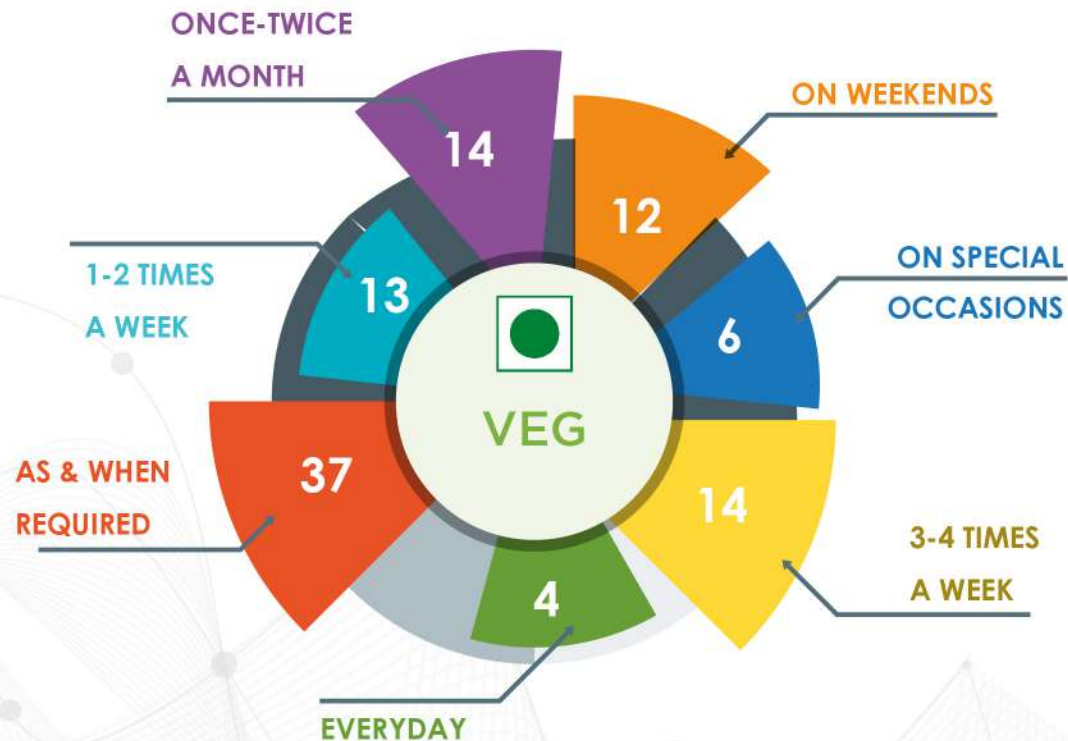


B4(a). Given below is a list of various VEG 'Heat & Eat' food products. Could you please tell us which products have you purchased in the last 6 months?

B4(b). Given below is a list of various NON-VEG 'Heat & Eat' food products. Could you please tell us which products have you purchased in the last 6 months?

All fig in % except base
Base: B4(a): 2,000 & B4(b): 1,400

Frequency Consumption of 'Heat & Eat' Food Products



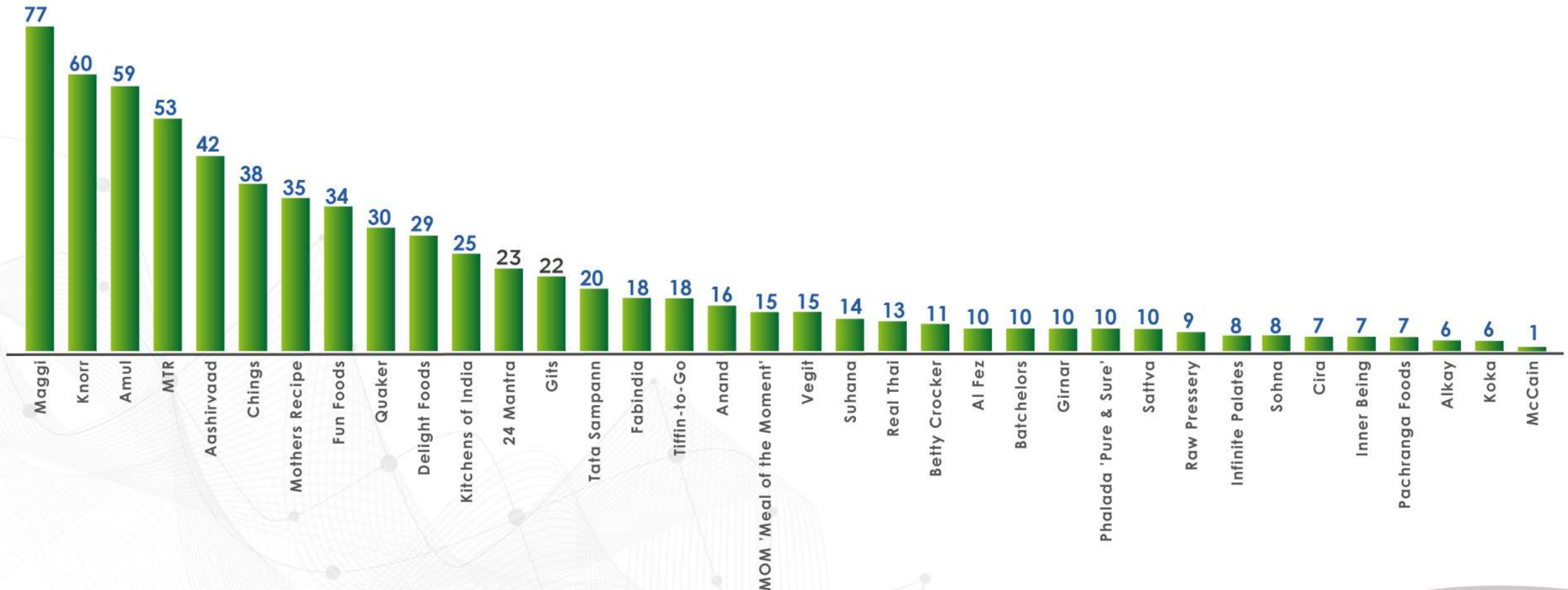
B5(a). Could you please tell us how frequently do you use/prepare VEG 'Heat & Eat' food products? It could be for your own consumption or for your family. Please answer for all occasions of consumption.

B5(b). Could you please tell us how frequently do you use/prepare NON-VEG 'Heat & Eat' food products? It could be for your own consumption or for your family. Please answer for all occasions of consumption.

All fig in % except base
Base: 2,000

Veg 'Heat & Eat' Brand Preference

A Pan-India presence of the bigger brands seems to have enabled them to garner a significant market share as compared to the remaining competition. It also helps that the vegetarian option allows them to cater to a much wider consumer base.

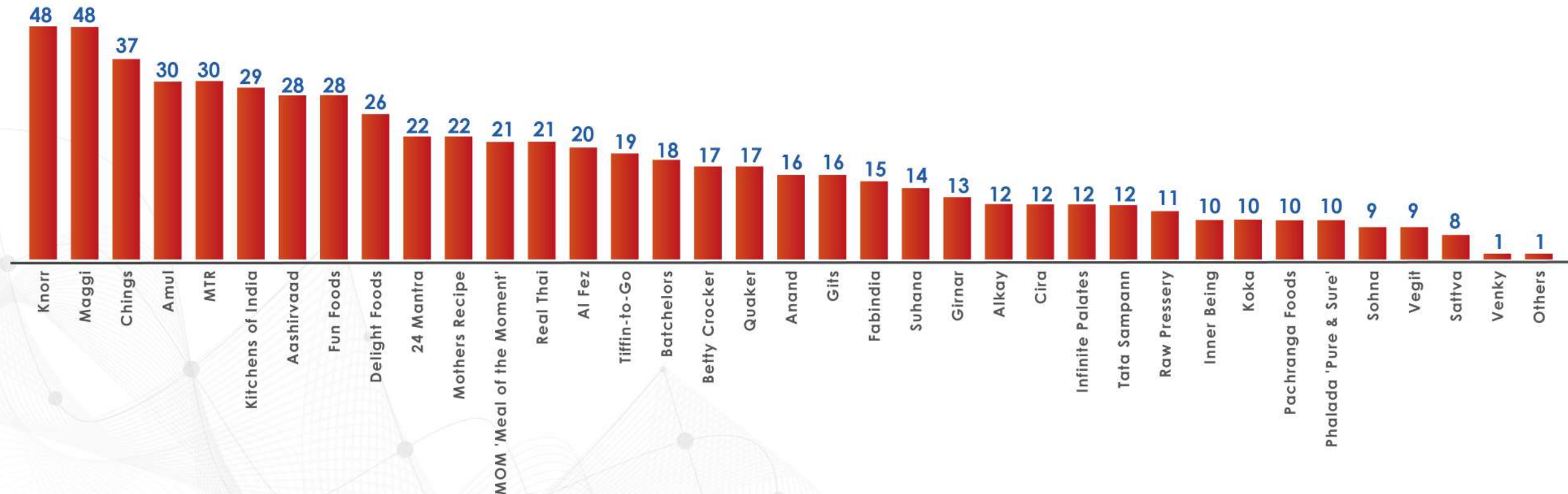


B6(a). Could you please tell us which brands do you use in VEG 'Heat & Eat' food products?

All fig in % except base
Base: 2,000

Non-Veg 'Heat & Eat' Brand Preference

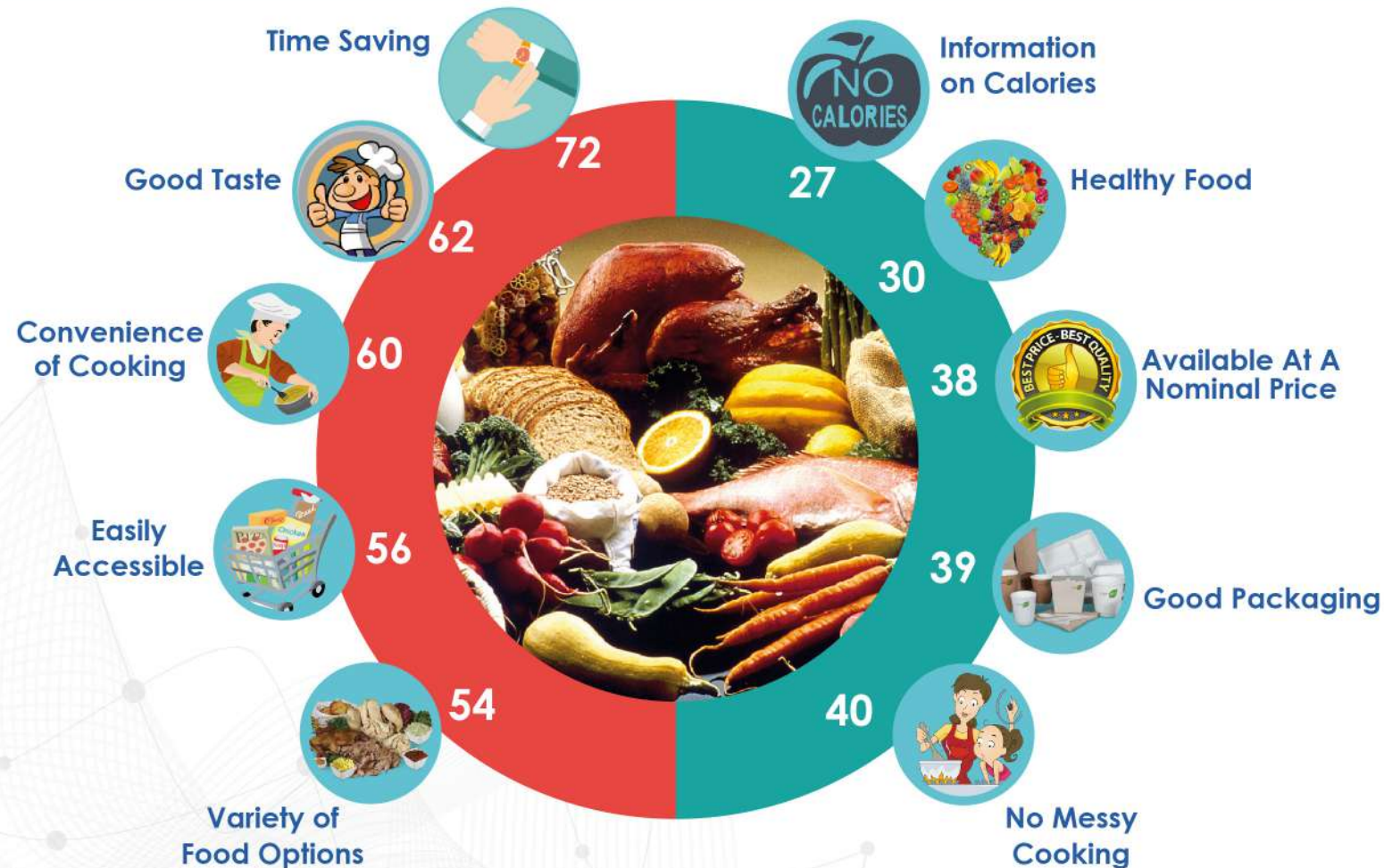
Maggi and Knorr continue being the biggest brand in the non-veg category as well, however their share is not as dominant as it is in the veg category. This could be due to the presence of many more regional brands, probably catering to a more individualistic palette of non-veg consumers across different cities across India.



The presence of some 'veg only' brands in the non-veg category seems to be out of place, however it could be due to the respondent's latent preference of these brands leading to an incorrect attribution.

Reasons for Purchasing 'Heat & Eat' Food Products

Convenience and Choice, expectedly, seem to be the key reason for consumption of RTE foods. While the marketing initiatives have historically been communicating the taste or price benefits, they do not feature as high in the reasons for preference.



B7. Could you please tell us, what are your main reasons behind purchasing 'Heat & Eat' food products? Please rank as per your preferences.

All fig in % except base
Base: 2,000

Summary 'Heat & Eat' **Food Products**

- 1 in every 3 consumers have consumed some form of Heat & Eat product in this week.
- Females consume it more than males.
- Snacks and Soups form the key consumed Heat & Eat products in both Veg and Non-Veg segments.
- French Fries, the most consumed snack is however had by less than 70% of the consumers.
- Chicken Nuggets, the loved non-veg snack is consumed by just about 50% consumers.
- Time saving and Convenience of Cooking are the most sought after benefits. Over 50% consumers look for variety of items too.
- Maggi, Knorr, Amul & MTR are the most used brands in both Veg and Non Veg segments at an overall level, even though their penetration varies at different cities.
- Some local flavours are also popular like:
 - Delight Foods & MoM – Meal of the Moment in Mumbai
 - Al Fez in Kolkata
 - Delight Foods, Batchelors, Betty Crocker in Pune
 - Mother's Recipe & Real Thai in Bangalore



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