

FOOD MOODS OF INDIA



Bahar-ka-khana is IN, literally.

India's **online food ordering** sector has seen a steep growth in the number of daily orders and continues a growth trajectory. It is becoming clear that **food tech is increasingly a function of logistics play** and therefore restaurant discovery might not be a deep competitive advantage.

This new **kitchen-centric model** has been feeding the curiosity of start-ups that are fighting neck to neck with traditional business models. With a noticeable **shift of consumers to the online food ordering** platforms, we also witness an interesting pattern in consumer choices in food and beverages.

To uncover the dynamics in this fast-changing ecosystem, this report delves into **deep details of out-of-home food consumption** to understand all the touchpoints and identify all triggers, motivations and influences that play a role in the F&B choice when Indians choose 'Bahar-ka-Khana'.



The research was conducted through online surveys and interviews by Ipsos on behalf of Uber Eats in 13 cities across India. The duration of the survey was from 15th Sep 2019 and 15th Oct 2019 among 4000 NCCS AB Indian consumers aged 15-50 years, who consume out of home food at least once a month.

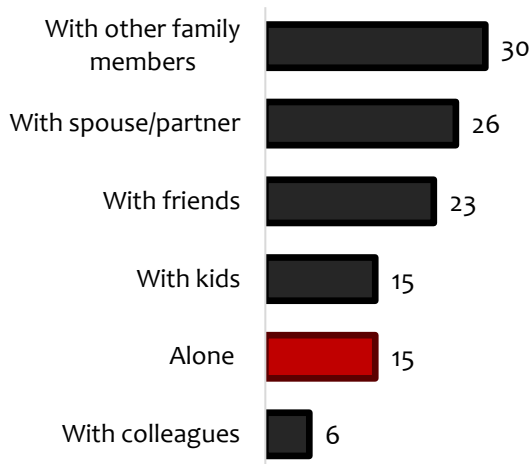
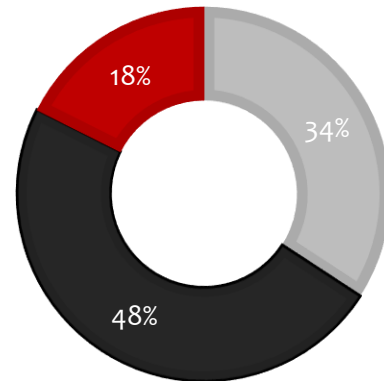
This document elaborates the key findings from the research.

Online delivery + takeaway larger than in-premise dining.

Consumers are getting used to enjoying restaurant food at the comfort and convenience of their homes. Online ordering has grown significantly in recent times.

2 in 3 non-home-cooked food occasions are either order-ins or take-aways. Trends are similar in metros and smaller towns, though takeaway slightly higher beyond metros where delivery relatively is less well spread owing to logistic challenges. However, this is likely to be only a matter of time.

■ Dine in ■ Delivery ■ Takeaway



Food consumption continues to be a group activity where consumers like to share a meal with people around them. Irrespective of eating out or ordering in, restaurant food is consumed mostly in a group and with family, partner or peers.

Noteworthy that 15% consumers do indulge in eating restaurant food alone, for online delivery this is 20% of occasions where consumers order food (mostly at home) and consume it alone.

Despite consuming out of home food often, experimentation is limited. 82% consumers stick to 5 or less restaurants when they are considering out of home food.

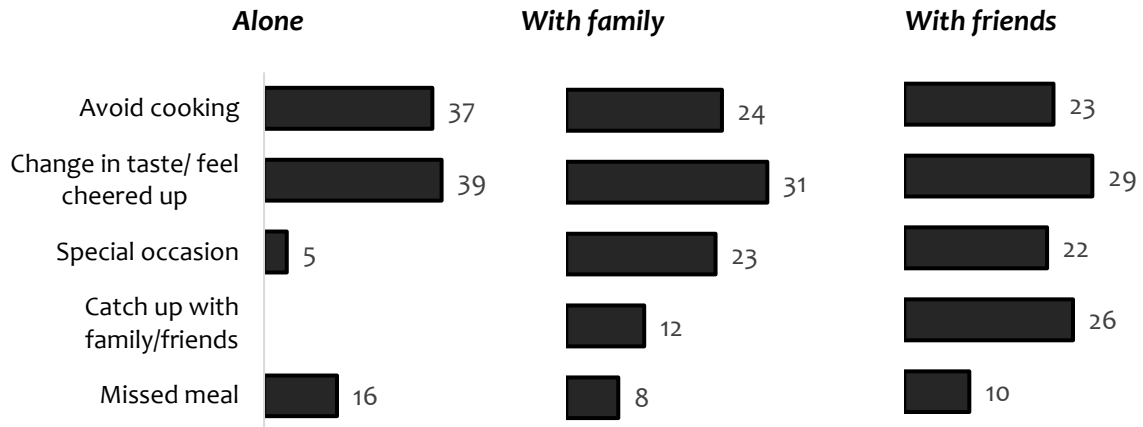
Online aggregators have brought an array of choice to the dinner table enticing consumers to try different cuisines and expand their food repertoire. As a result, while ordering in, consumers have a larger consideration set of restaurants, almost 50% ordering from 4 or more restaurants.

Heavy consumers are more experimentative whereas light consumers are habit driven. As consumers get more comfortable with consuming restaurant food on a regular basis, they gain more confidence in trying food from different restaurants. However, it is noteworthy, that given that the multitude of restaurants available, both offline and online, consumers continue to choose from a limited repertoire.

Indulging in non-home food is **not for special occasions only.**

Overall 1 out of every 4 occasions for bahar-ka-kahna is to avoid the cooking chore thus making it a regular affair at home. This trigger is expectedly much higher among solo consumption occasions. People are now ordering restaurant food and serving to guests without guilt, as when hanging out with friends, consumers would like to avoid spending time in their kitchens.

Reasons for choosing out-of-home food:



Families, especially the nuclear families, find it convenient to enjoy a restaurant meal at home when they are celebrating special occasions. Comfort of home and the taste of favourite restaurant food – best of both worlds.

With dual-income families, now urban India has witnessed changes in lifestyle with increasing changes in daily routines and food habits. The demand for quick access to food that is affordable in rates is on the rise.

Consumers are time pressed and thus there is an increasing need to spend quality time with families. This has gradually built the need to home delivery or take out services to save the time and energy that would otherwise go into cooking up a meal at home.

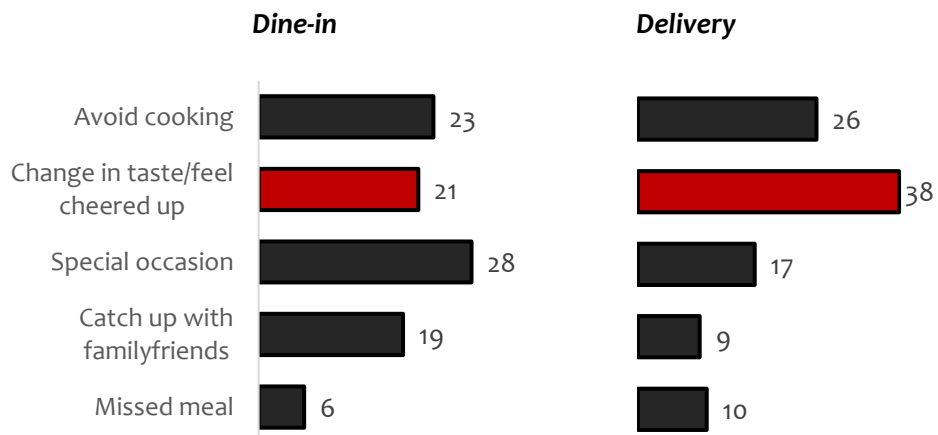


Bahar-ka-khana is often chosen as a ‘**mood lifter**’ on blue days.

While for visiting a restaurant, special occasions and catch-ups with family and friends are the key reasons, breaking the monotony is a bigger trigger for order-ins. On 4 out of 10 occasions, ‘bahar-ka-khana’ plays a significant role in lifting spirits, a trend starker amongst women.



Reasons for choosing out-of-home food (for women):



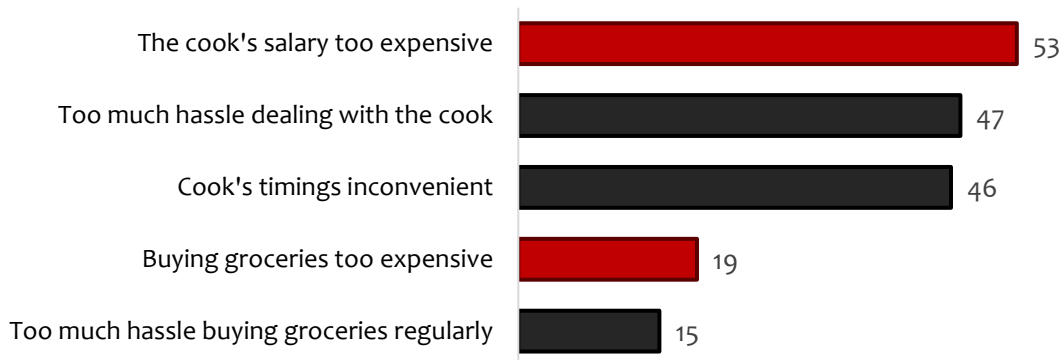
With stress levels in urban India rising, consumers seek occasional comfort in food. Bahar-ka-khana which is available at the tap of a phone is fast becoming the choice for respite.

Ordering food seems **more economical than hiring a cook.**

Consumers have also realised that ordering food is not only convenient, it works out to be more economical than employing a cook. Added to that is the advantage of not having to bother about stocking groceries and dealing with a cook.

The comfort in consuming bahar-ka-khana often without health hazards have given consumers of making restaurant food a part of their diet, replacing home -cooked food frequently.

Almost 4 in 5 consumers have not hired a cook, the **reasons for this decision being:**

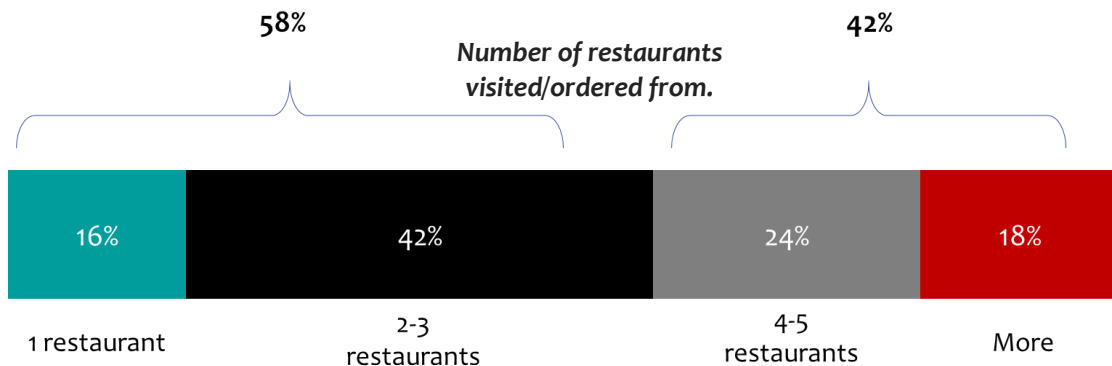


This dual advantage makes ordering in an almost obvious choice for Indian urban consumers.



Despite a large variety of options available, **experimentation is limited.**

There is a large and diverse universe of restaurants both offline and online. In fact, online with the inclusion of cloud kitchens the choice seems almost indefinite. One would possibly expect consumers to exercise this choice and keep experimenting with new cuisines and food types across different restaurants.



The reality is contrary. Over 80% of the consumers visit/order from a maximum of 5 restaurants. For online orders, the experimentation is marginally high only. It is evident that consumers are operating largely on auto pilot, repeating the same restaurants irrespective of the need or occasion.

Appeal of the cuisine/ food type and offers and discounts available are the key lens when looking for a restaurant. In case of home delivery, discounts are slightly more important.

All other factors are largely incidental. Interestingly, the food order is to a large extent agnostic to company and occasion, unless it is a special celebratory occasion.

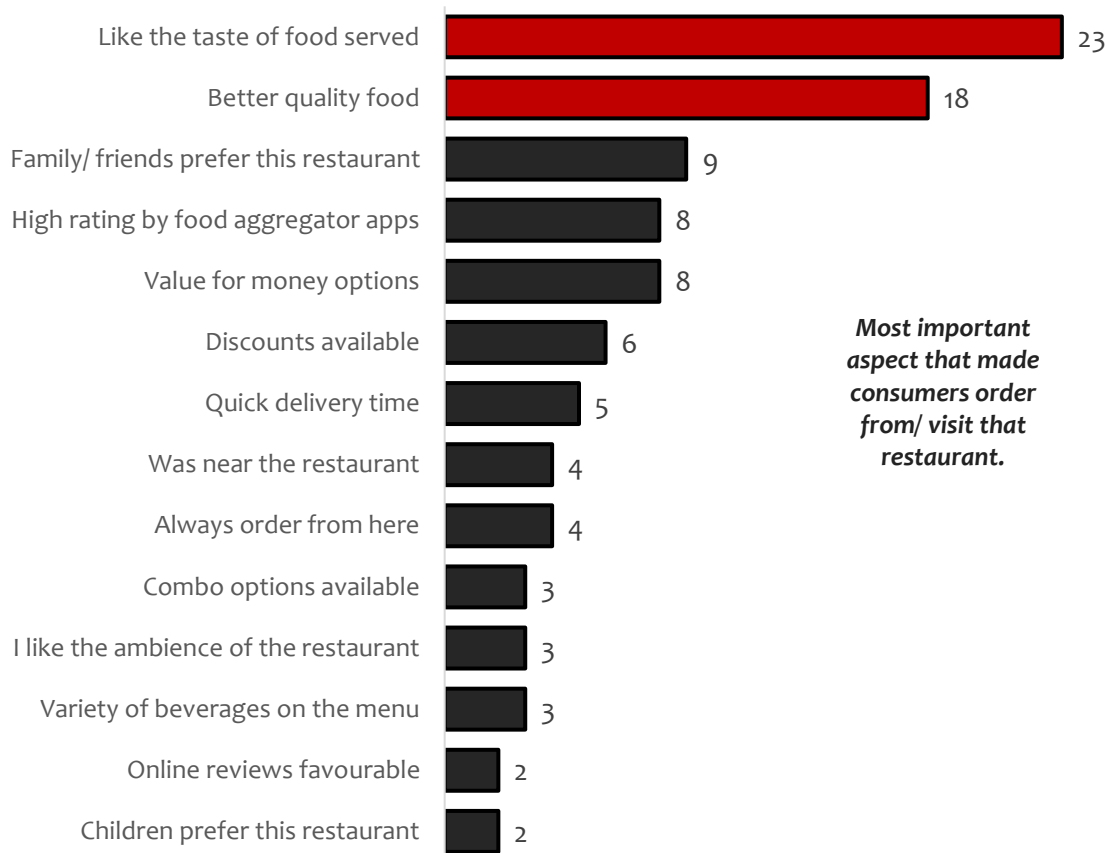
Factors considered before considering a restaurant:



What's on the table more important than where the table is.

The choice of restaurants is heavily basis the specific food served at the restaurant and this is true for both online ordering as well as consumption at the premise. Taste is the predominant driver of choice along with the perception of good quality (a function of experiencing the food).

Given that the destination food is the key differentiator for choosing a restaurant, it makes little difference if the food is ordered in rather than making the effort to visit the restaurant.



Interestingly, even for in-premise food consumption, ambience is less important as compared to the experience of the food. 17% consumers choose a restaurant based on the ambience including the choice of company whereas almost double that, 42% choose basis the taste and quality of food. As cloud kitchens become more popular, giving consumers a variety of choice in terms of cuisine and food types, ordering in food is likely to keep growing as a phenomenon.

Restaurants need to consciously work towards making the in-premise consumption experience distinctive enough to entice consumers.

Meal-in-a-box makes convenience more convenient.

Not only has the concept of ordering in become a matter of convenience, consumers are choosing convenient packaging to make the consumption experience easier.

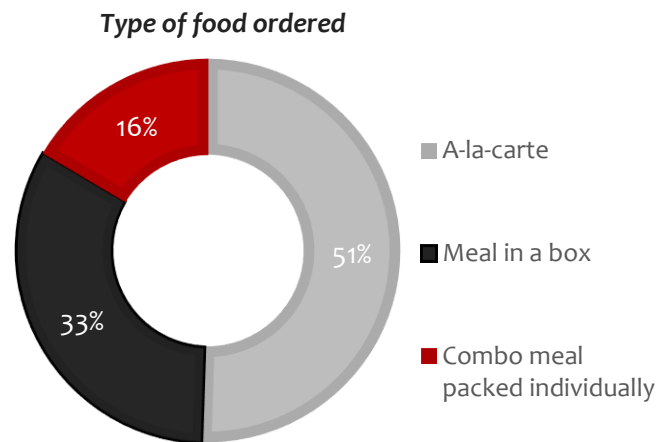
Although, food mostly ordered a-la-carte, but all-in-one meal bowls see favour amongst almost 1 in 3 consumers. Specifically, for delivery, 51% order a combo meal or a meal in a box.

Since consumers are pressed for time and are also not experimenting a lot across the restaurants listed, a readily put together meal combination works very well and are order spontaneously.

Yet the convenience does not end at that! It's interesting to note that in case of ordered in food, 35% eat straight out of the box. Thus, the convenience is stretched not only to not cooking at home but also not worrying about using utensils and getting then cleaned!

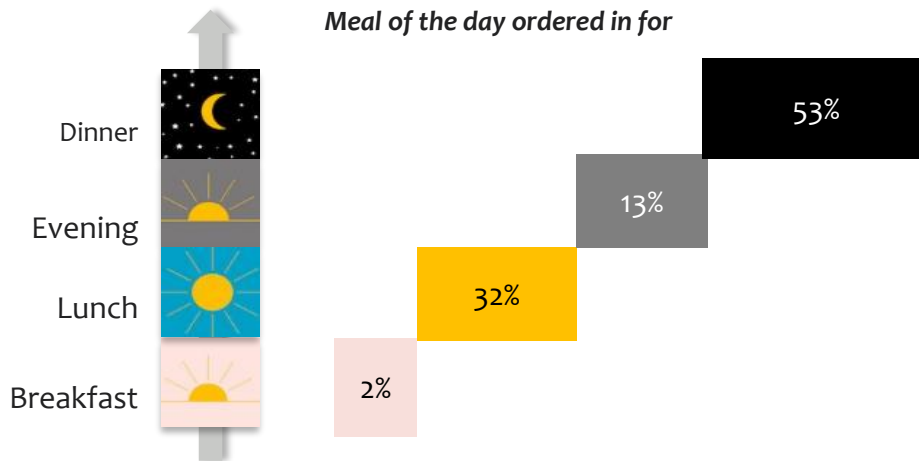
Beverage and dessert orders limited; hardly ever ordered solus. On average consumers order 2 items (food + 1 of dessert/beverage). More than half of the occasions, consumers order only food.

While 2 in 3 have some beverage with their food; only half of them order them from the restaurant. Often the beverage is not ordered with food but bought separately from the neighbourhood store – possibly because of economy and variety of pack sizes available.



Breakfast considered important, outsourcing options limited.

Online orders predominantly in the second half of the day when consumers are tired after the day and cooking a meal seems a tedious affair. 82% consumers, however, consume a home cooked breakfast as they realize the importance of consuming a meal before getting on with their work and the energy levels are also high at the beginning of the day.



While less than majority of the consumers choose a home-made breakfast, half of the same group of people do not worry about ordering dinner. This seems a function of options available currently on the online food delivery or restaurant apps. Breakfast comes across like a home delivery opportunity missed, which could be addressed by an array of 'hot and fresh' morning meals.



	Breakfast	Mid-morning meal	Lunch	Evening snack	Dinner	Post dinner snack
Before 8 am	Highlighted					
8 am - 10 am	Highlighted					
10 am - 12 noon	Highlighted	Highlighted				
12 noon - 2 pm		Highlighted	Highlighted			
2 pm - 4 pm			Highlighted			
4 pm - 6 pm				Highlighted		
6 pm - 8 pm				Highlighted	Highlighted	Highlighted
8 pm - 10 pm					Highlighted	Highlighted
10 pm - 12 midnight						Highlighted
Post 12 midnight						Highlighted

There is a tendency of ordering delayed meals.



Highlighted cells are the peak ordering time slots in each meal.

Biryani and North Indian top the chart, but **Desi Chinese** and **Pizza** have found space on the table too.

Perceptions about different cuisines are quite distinct and consumers believe there are clear strengths and weaknesses. Biryani seems to be universally owned as a regional food in many parts of India and does not fall in any one cuisine (considered North Indian, Mughlai mostly).

	Offers excellent tasting food	Offers food enjoyed by children	Offers food suited to Indian palate
	American Authentic Chinese Desi Chinese	American Desi Chinese Italian	North Indian South Indian Other Indian Mughlai
	Mediterranean Japanese Other Indian	Thai North Indian South Indian	American Authentic Chinese Italian

	Has health options available	Has light food options suitable for snacks
	Thai Japanese South Indian Coastal	American Thai Mediterranean Mexican
	Authentic Chinese Desi Chinese	Desi Chinese North Indian Mughlai

	Great for celebrations/ special occasions	Has value for money food options	Great home delivery options
	Italian Mughlai	South Indian	Desi Chinese
	South Indian	American Italian	Thai North Indian South Indian

Consumers prefer healthy; **do not necessarily order healthy.**

In terms of preference, consumers often choose cuisines which they know are relatively healthier. However, their orders tell a different story! They eventually end up choosing the more popular and possibly tried and tested items from the restaurants of choice.

Thus, it's important to note that while consumers are always seeking variety and are conscious about their health, their choices in bahar-ka-khana don't reflect that.

Cuisines preferred

1. South Indian, North Indian
2. Desi Chinese
3. Mughlai
4. Other Indian
5. Italian
6. Authentic Chinese
7. Mexican
8. Mediterranean
9. Thai
10. American
11. Japanese

Cuisines ordered

1. North Indian, Mughlai
2. Desi Chinese
3. Italian
4. American
5. South Indian
6. Other Indian
7. Authentic Chinese
8. Mediterranean
9. Mexican
10. Japanese
11. Thai

South Indian food is considered far healthier as compared to Chinese such that the preference of South Indian cuisine = 2 times that of Chinese cuisine. However, actual occasions of order of South Indian = $\frac{3}{4}$ th that of Chinese.

This could be a function of auto pilot behaviour or not being able to find what one is looking for. Possibly consumers are seeking healthy choices in familiar formats – an opportunity that could be tapped into.



Food delivery making way for **date nights at home.**

36% of all Bhakar-ka-Khana occasions with spouses/partners are order ins, indicating that home is becoming the place of choice for spending a romantic evening. This is clearer in the nature of the order too. Consumers loose their purse strings significantly more (order value being 3 times compared to a solo order and similar to a larger group order) and spend on other items apart from the basic meal, especially desserts.

The consumers also far more conscious while placing the order and the expectation from the app is also more. When ordering solo, consumers are more keen on the discounts. Consumers also make an effort to lay the table more often when it's a couple meal!



	Solo	Couple
Average Order Value	INR 450	INR 1300
Desserts ordered	21%	37%
Eat straight out of the box	35%	12%

Unwinding with favourite food emerging as a date with oneself.

With the lives becoming more hectic and stressful by the day, people seem to be in a need of taking time out for themselves. These are the moments when they feel the need to retreat and recharge.

The key need for such moments is an experience that soothes, comforts and takes away the stresses and strains of their daily lives. For such occasions, people often order 'bahar ka khana' to savour solo me-time.



19% of occasions where food is ordered in, consumers choose to unwind and relax alone. Enjoying the company of their favourite food at the comfort of their homes, acts as a date with oneself, which becomes the much-needed time with oneself that helps consumers refresh and rejuvenate.

Noteworthy that this phenomenon holds for both singles and married consumers, finding some time for oneself with ordered food is equally important and sought after.

Role of the food here is to provide comfort, consumers seek familiarity and ofcourse convenience.