



THINKING HATS

# MILK & DAIRY PRODUCTS CONSUMPTION BEHAVIOR DURING COVID-19

## DIGITAL RESEARCH INSIGHTS

BY : THINKING HATS CONSUMER INSIGHTS, INDIA

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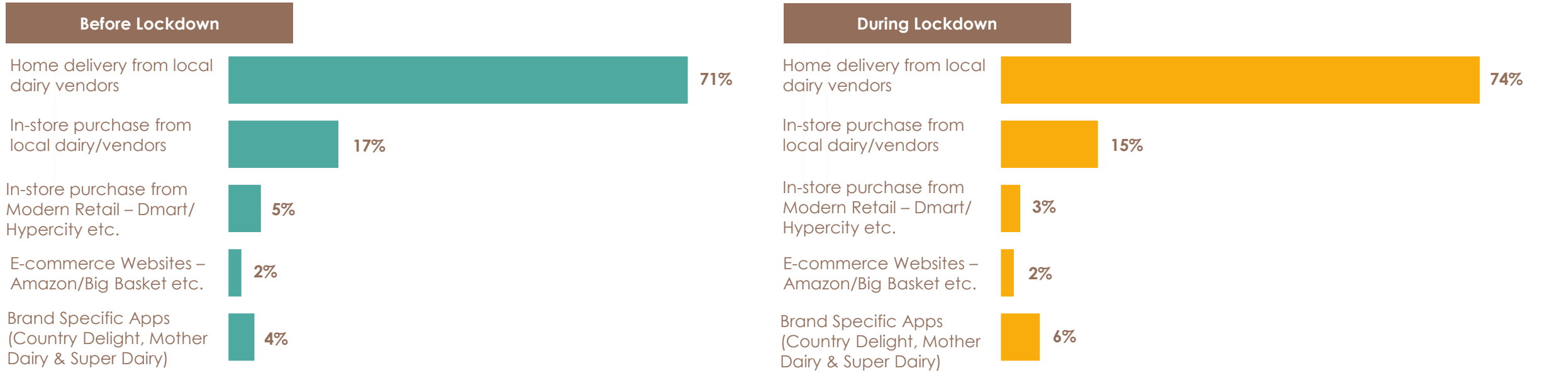
## RESEARCH DESIGN

Thinking Hats conducted a Digital Survey via. its Proprietary Platform: **'APPtitude'** on the purchase behavior for Milk & Dairy Products during the lockdown

240 consumers belonging to NCCS A1, A2, A3, B1 were targeted across 3 Metros : Mumbai, Delhi & Bangalore



# MILK PURCHASE BEHAVIOR : BEFORE & DURING LOCKDOWN



- Home delivery from local dairy vendors is still the most preferred purchase option (during and before the lockdown period)
- In-store purchase from local dairy/vendors has sustained at 15% as compared to 17% before lockdown
- Milk purchase from Modern Retail, E-commerce Websites & Brand specific Apps attribute to 2-6% of purchase preference (with no significant shift in behavior during the lockdown)
- **Milk purchase behavior almost remains unchanged during lockdown**





# MILK CONSUMPTION

## BEHAVIOR (WEEKLY)

	Delhi	Mumbai	Bangalore
Before Lockdown	13.1 Litres	12.1 Litres	6.8 Litres
During Lockdown	13.8 Litres	13.6 Litres	6.6 Litres

- On an average, during the lockdown phase, consumers have consumed 11.1 Litres of milk as compared to 10.7 Litres (before lockdown), weekly
- Consumption during the lockdown increased by 7% in NCCS A1,A2 and 3% in NCCS A3,B1
- Milk consumption seems to be higher in Mumbai and Delhi while in Bangalore consumption remains the same



# MILK BRAND PREFERENCES ACROSS GEOGRAPHIES

Before Lockdown

During Lockdown

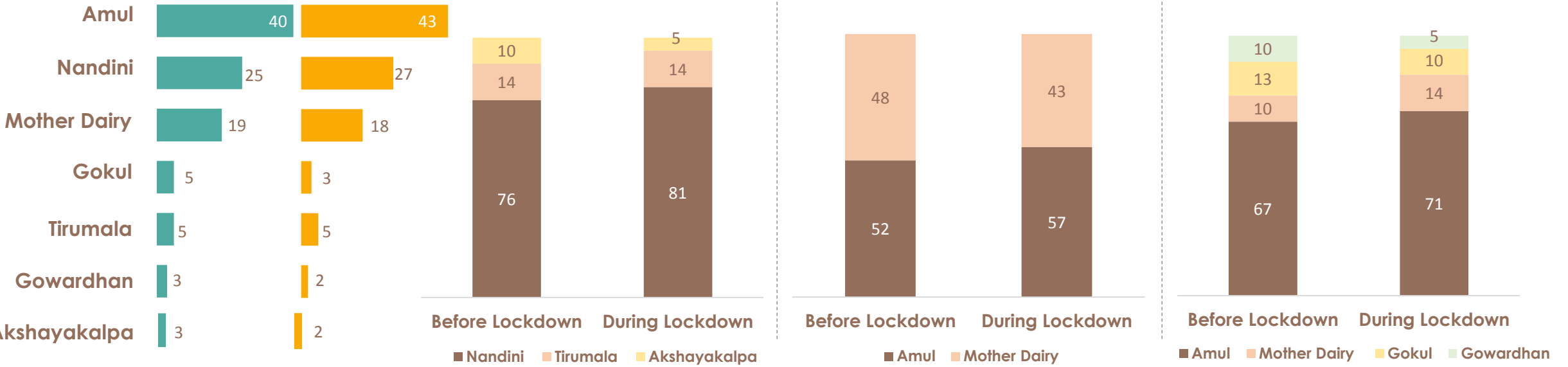
Nos. in %

Overall

Bangalore

Delhi

Mumbai



- At an overall level, the 7 most preferred brands have sustained their preference among consumers even during the lockdown phase
- Nandini (81%) enjoys highest preference amongst other national brands in Bangalore
- Amul (57%) & Mother Dairy Milk (43%) are most purchased brands in Delhi while in Mumbai, Amul continues to lead significantly in purchase preference against other brands (even during the lockdown)



# MILK CONSUMPTION PURPOSES : DURING LOCKDOWN



With Tea/Coffee  
(98%)



Plain Milk  
(68%)



Curd/Buttermilk/  
Paneer (58%)



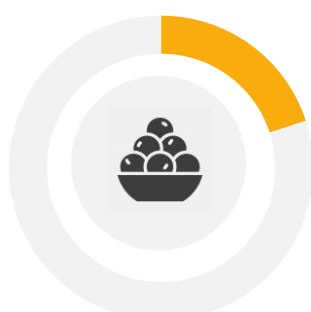
Milk Shake  
(36%)



Baking  
(37%)



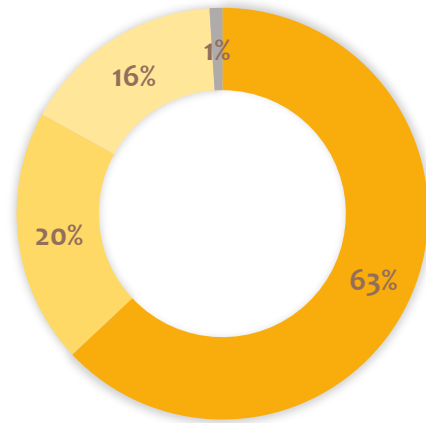
With Cereals/Fruits  
(21%)



Desi Sweet  
Preparation (20%)



# MILK POWDER CONSUMPTION DURING LOCKDOWN



- Haven't bought before the lockdown nor during
- Used to buy before and have continued to purchase during the lockdown
- Not purchased before but started during lockdown
- Used to buy before and currently buying more during the lockdown

- 16% consumers have started purchasing milk powder during lockdown
- Among consumers who have purchased milk powder, 73% consumers have bought milk powder as a backup option during the lockdown.
- 27% consumers in Bangalore have purchased milk powder only during the lockdown phase, followed by Mumbai (13%) and Delhi (7%)



# CONSUMPTION BEHAVIOR ACROSS CATEGORIES

01

On an average, mostly consumers are consuming less quantity of other dairy products (apart from Milk) currently during the lockdown

02

Most impacted categories are - Desi sweets (47%)  
Paneer, Butter, Cheese, Flavored Dahi and Flavored Milk (41-43%)

03

Packaged Products like buttermilk is less consumed the most, due to shortage/unavailability followed by others like Curd and Paneer





# CATEGORY TRENDS IN THE TIMES OF CORONA..



## DALGONA COFFEE

Bangalore shows higher traction of following the 'Dalgona Coffee' trend (13%) as compared to Mumbai & Delhi

## HALDI MILK

Haldi Milk consumption during Corona sees a spike in Delhi (13%)



# WHAT'S IN STORE, POST COVID-19?

## BRAND PERCEPTION & USAGE ASSESSMENT

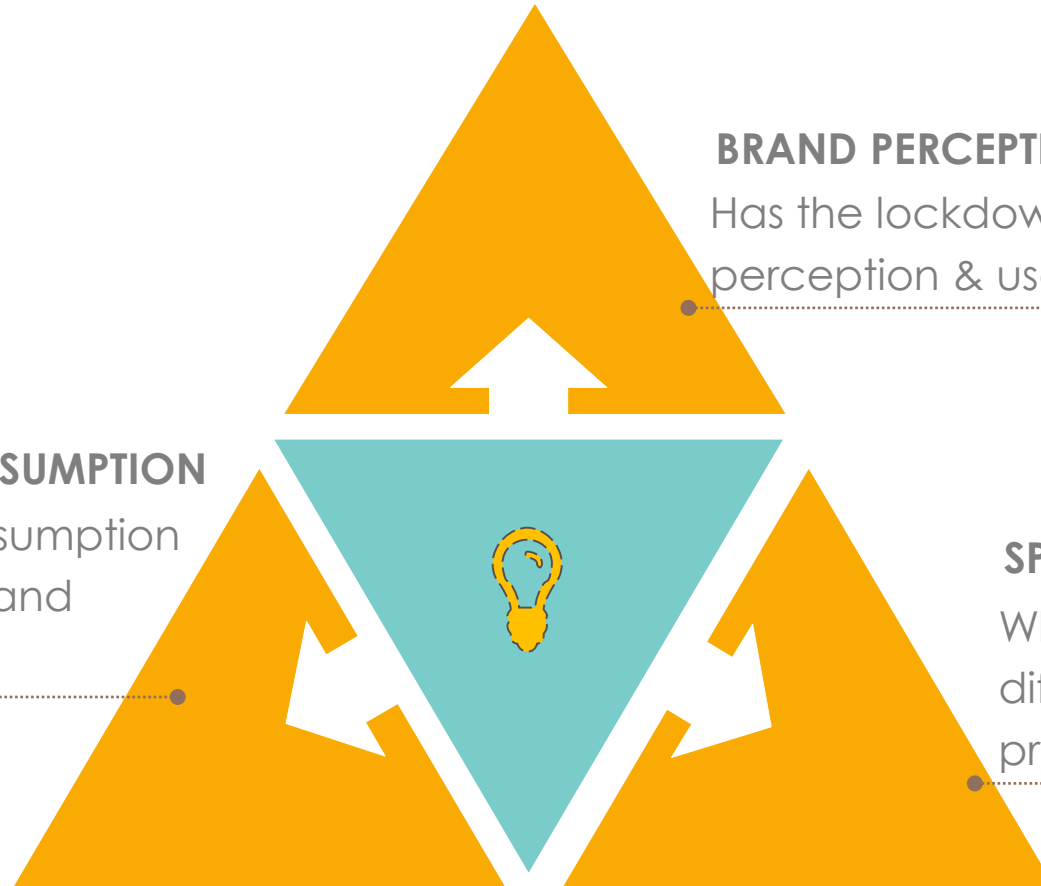
Has the lockdown brought a shift in brand imagery, perception & usage behaviour?

## BEHAVIOURAL SHIFT IN MILK CONSUMPTION

Post lockdown, how will milk consumption patterns change across cohorts and geographies?

## SPECIFIC PRODUCT RANGE INSIGHTS

What do consumers prefer across different milk variants and other dairy products?





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FOR MORE INSIGHTS,  
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