

White-paper

TRA's Coronavirus Consumer Insights - 2

(Consumer insights comparison between
Lockdown 1.0 to Lockdown 3.0)

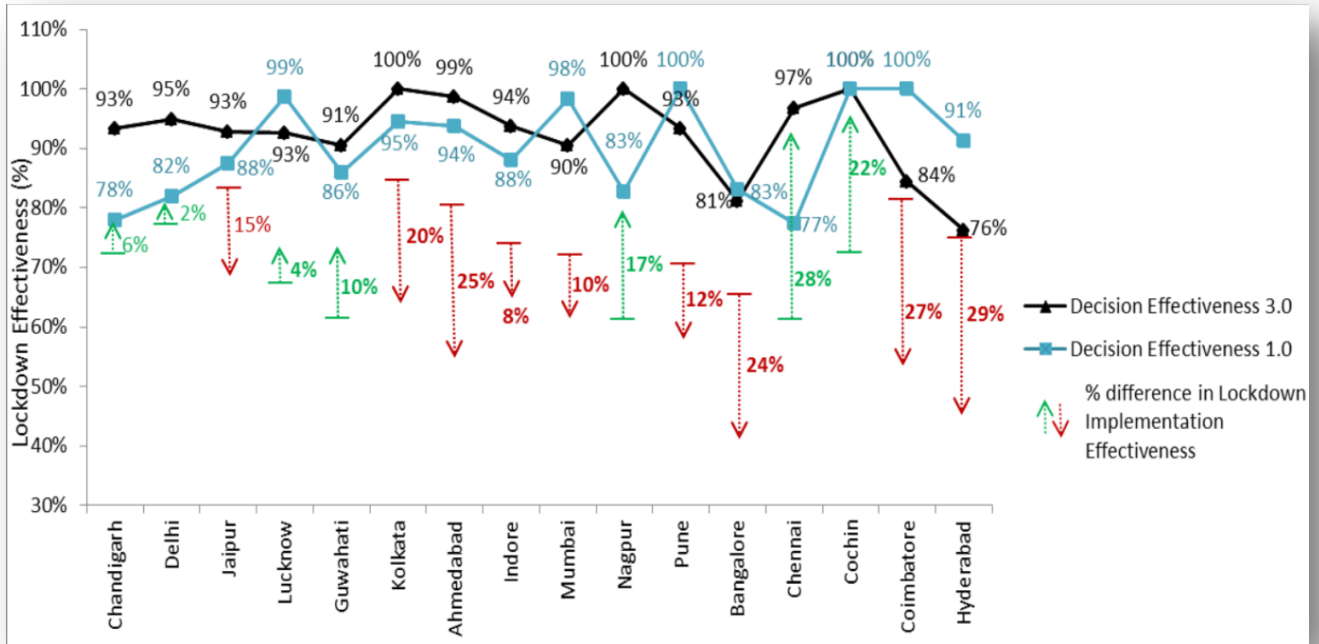
A primary research covering 902 respondents
across 16 cities from 30th April to 21st May, 2020



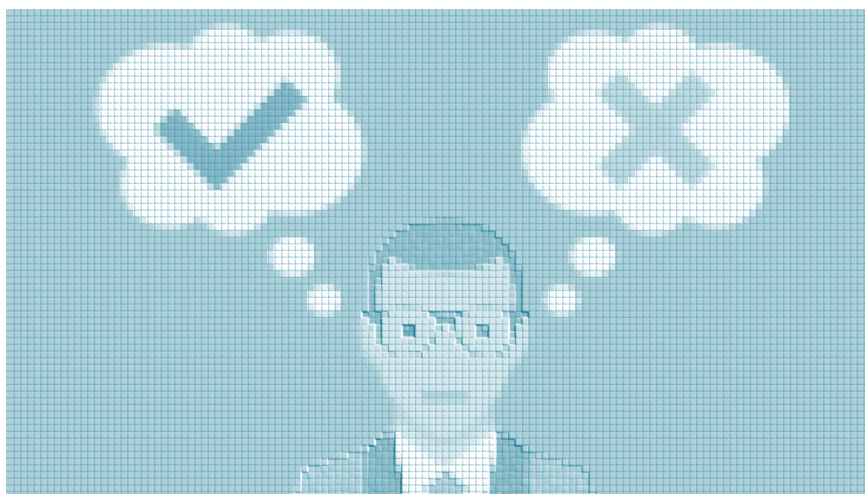
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Lockdown Decision and Implementation effectiveness

Weariness grows with time, and good decisions can seem bad, in such extreme case of lockdown. However, contrarily, barring a few cities, the general consensus about the 'Decision Effectiveness' from Lockdown 1.0 to Lockdown 3.0 only seems to have gone through a rise. The few cities which had a poorer perception of the Decision Effectiveness as they transitioned Lockdown 3.0 are Hyderabad and Coimbatore.

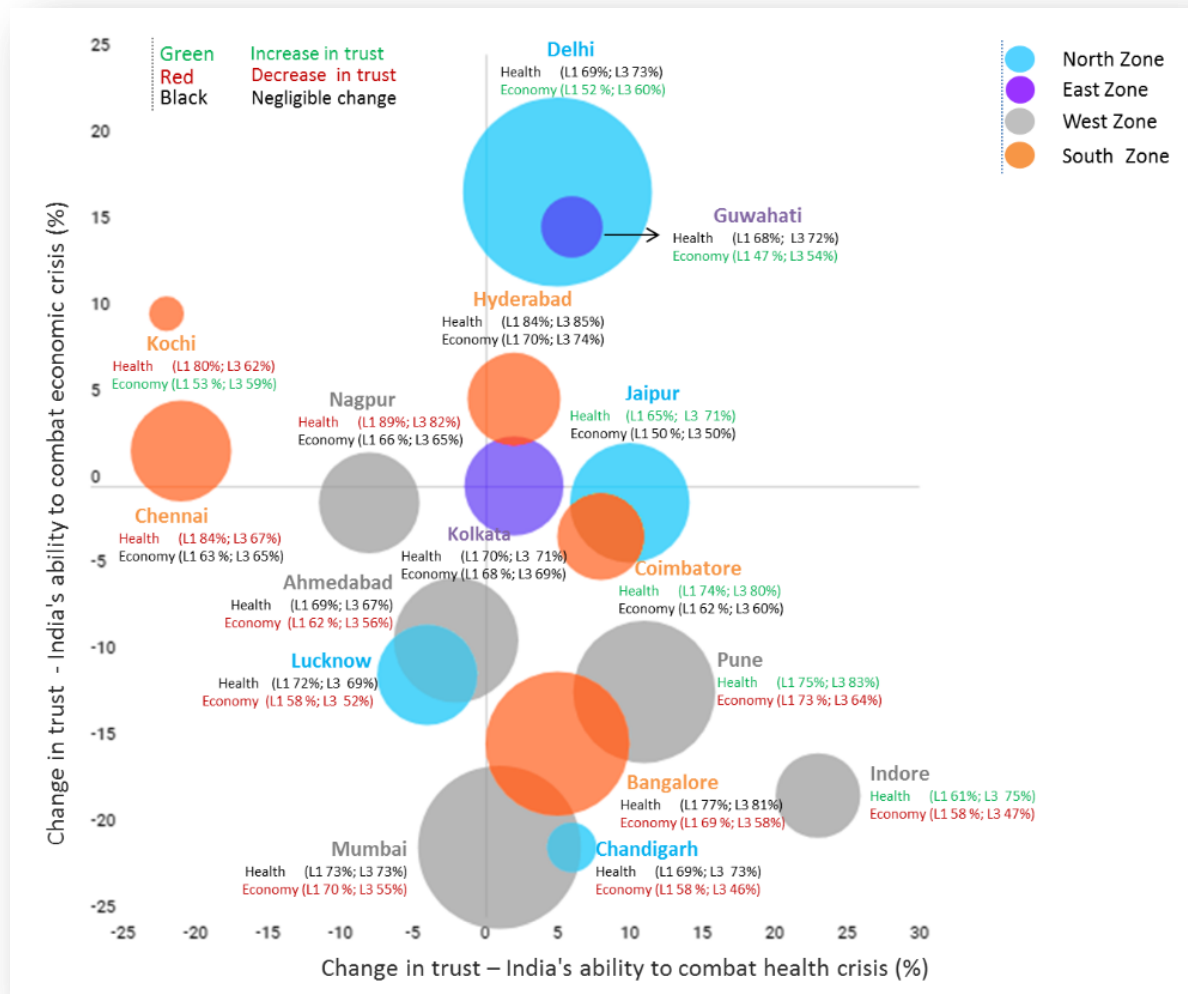


When considering the Lockdown Implementation Effectiveness difference between Lockdown 1.0 and Lockdown 3.0, nine of the sixteen cities had a significant lowering on the Effectiveness Index. The only cities which showed any significant increase on the Lockdown Implementation Effectiveness were Chennai (up 28%), Kochi (up 22%) and Nagpur (up 17%).



Trust in India's ability to overcome health and economic pandemic

Of the four quadrants, the top-right quadrant which represents the High-High segment, and the bottom-left quadrants representing the Low-Low segment, both remain relatively empty, showing that no city has improved or decreased trust on both parameters, in the country's ability to recover from the Health and Economic Crisis, simultaneously. Most cities hover around the axis, moving on one axis or the other, showing the change in trust in India's recovery from either Health or the Economic crisis. Reader may note the following (i) the size of the bubble represents the population



of the city under consideration, (ii) the numbers for L1 and L3 represent the Trust Indices in recovery of Health and Economic crisis, and (iii) the coordinates in the graph represent the percentage change in the indices represented as $(L1-L3)/L1$, where L1 and L3 are the two different lockdown periods.

Kolkata sits right in the center of the quadrants showing no trust change in both Health and Economy

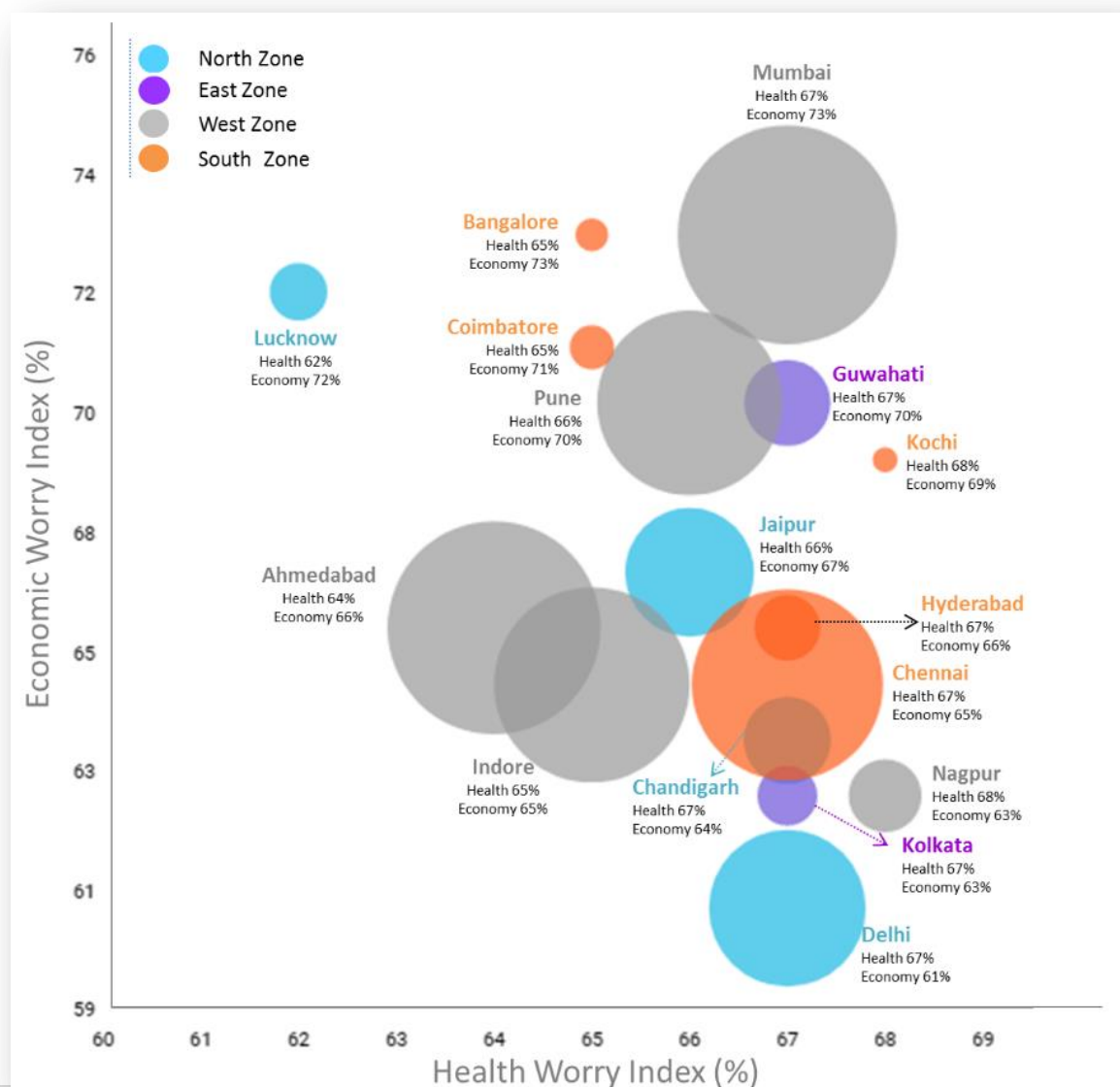


parameters from Lockdown 1.0 to Lockdown 3.0. Staying with the cities on the axes, only Delhi and Guwahati show a significant Trust improvement on India's ability to combat the economic crisis, while Mumbai, Chandigarh, Bangalore, Lucknow and Ahmedabad show a decrease in Trust from Lockdown 1.0 with regard to India's ability to combat the economic crisis. These cities have a negligible change in their Health outlook.

Moving on to the other axis, in terms of India's ability to combat the health crisis, Coimbatore shows some distinct trust increase, but Chennai and Nagpur show a decrease in trust in the ability to meet the health crisis with effectiveness, while their economic outlook is unchanged from Lockdown 1.0. Kochi's trust on the ability to recover from Health is lower, while its economic outlook has improved. Indore and Pune on the other hand have an improved trust in health recovery, but a lower trust in economic recovery.

Health and Economic worry Indices

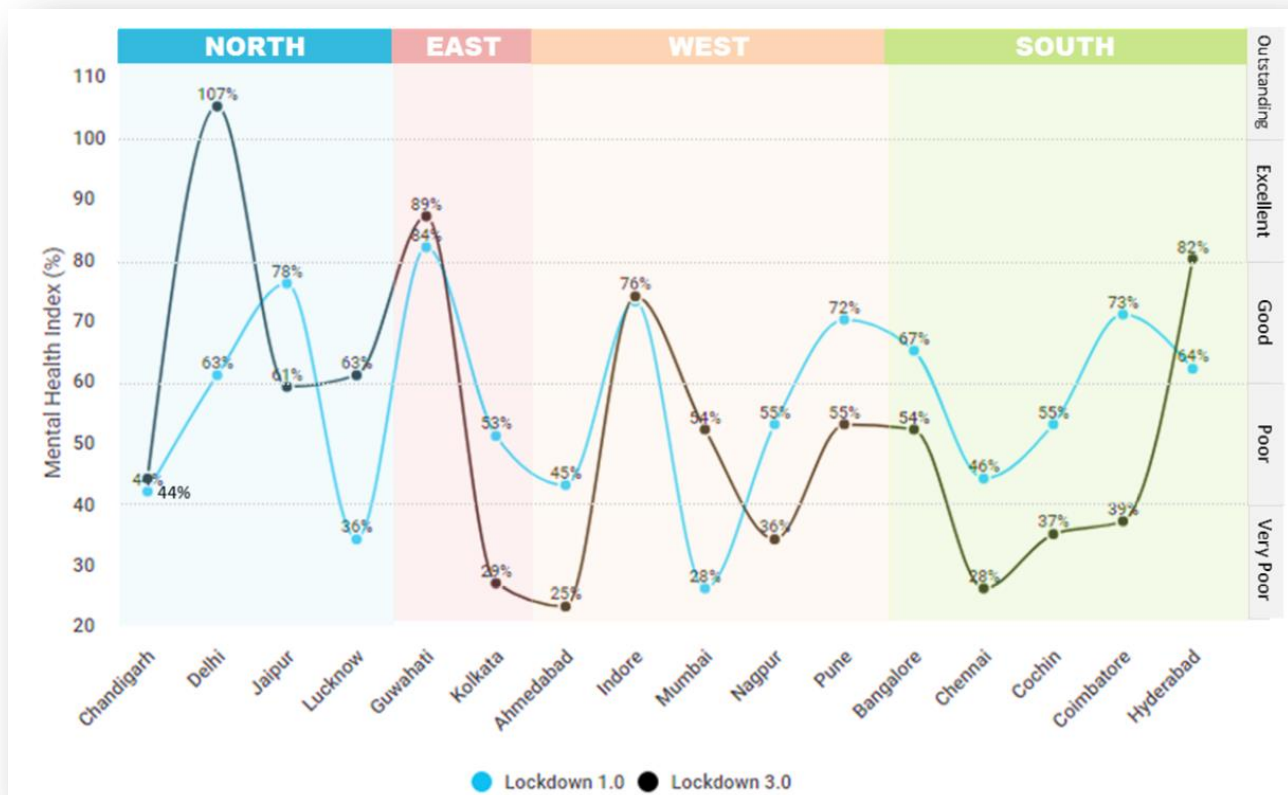
Worry is a nasty reality, and when it hits on two fronts, Economic and Health, it quadruples. This graph is on a worry scale, with 100% as the highest Worry Index. The bubble size shows the confirmed Covid-19 cases per million in each city as on 27th May, 2020, since the number of cases may have an impact the probability of health and economic anxieties.



It is counter-intuitive that there is no correlation found between the number of confirmed Covid-19 cases and the Health and Economic Worry Indices. In fact, though Western India has the highest number of confirmed cases per million, the Worry Indices in this region do not seem to be much different than the rest of the country. Specifically, Ahmedabad and Indore demonstrate comparatively lower worry as compared to the Covid incidence rate in the cities. The entire band of worry across the cities is in the 'High' to 'Extremely High' range on both counts, with Health Worry ranging between 62% to 68%, and Economic Worry ranging between 61% and 73%. Mumbai displays the highest Worry on both counts (Health Worry Index at 67% and Economy Worry Index at 73%) with average worry at 70%. Delhi displays the lowest average Worry Index at 64% (Health Worry Index at 67% and Economy Worry Index at 61%).

Mental Wellbeing Index (MWBI)

Mental Wellbeing is measured as a person's ability to cope with various worries they may encounter. It is the sum of the cognitive, behavioural, emotional and spiritual wellbeing of a person. Worries may be real or imagined, but the easiest way to explain worry is as 'advancement of anxiety'. Coping counterbalances worry, and it is a person's ability to deal with responsibilities, problems, or difficulties successfully or in an adequate manner. During a serious and continued crisis like the current lockdown, the coping ability may increase or decrease against worries depending on several personal and environmental factors. The first edition of TRA's whitepaper Coronavirus Consumer Insights – 1 was published on 24th April 2020. This whitepaper compares the change in mindsets of citizens from Lockdown 1.0 to Lockdown 3.0.



Delhi (NCR) citizens display an 'Outstanding' rating in the Mental Wellbeing Index, with the citizenry's coping skills bettering their worries. Guwahati at 89% MWBI and Hyderabad at 82% MWBI both display 'Excellent' Mental Wellbeing. Indore displays an unchanged MWBI score at 76% and continues to display 'Good' Mental Wellbeing.

Ahmedabad displays the lowest Mental Wellbeing at 25% followed by Chennai at 28% and Kolkata, facing the dual crises of Covid-19 and Amphan is at 29% MWBI. Along with these cities, Nagpur (36%), Kochi (37%) and Coimbatore (39%) also display 'Very Poor' Mental Wellbeing.



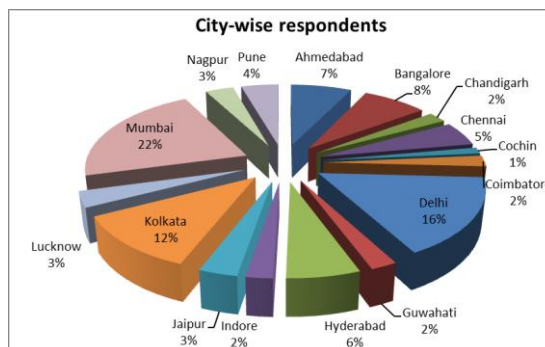
Four cities showed improved Mental Wellbeing between Lockdown 1.0 and Lockdown 3.0. Delhi (NCR) was leading and the city displays Outstanding Mental Wellbeing at 107% with Coping higher than Worry. The city also shows the highest rise in Mental Wellbeing Index (rise of 44%) from Lockdown 1.0. Lucknow showed a 27% improvement in the Mental Wellbeing Index to now display Good on the MWBI scale. Mumbai has a rise in MWBI of 26%, though still at a Poor on the MWBI metric. Hyderabad is the only other city where Mental Wellbeing Index has shown a rise of 18%, rising from Good to Excellent Mental Wellbeing. All other cities either did not show any change in the MWBI or showed a decrease in Mental Wellbeing.

The City Mental Wellbeing heatmap shows the data in a different format, clearly showing the deterioration of Mental Wellbeing in a majority of the cities with significant exceptions as stated in the above paragraph (Green indicates better MWBI, and colour changes progressively toward Red showing worse MWBI).

City	L1 MWBI	L3 MWBI
Chandigarh	44%	46%
Delhi	63%	107%
Jaipur	78%	61%
Lucknow	36%	63%
Guwahati	84%	89%
Kolkata	53%	29%
Ahmedabad	45%	25%
Indore	75%	76%
Mumbai	28%	54%
Nagpur	55%	36%
Pune	72%	55%
Bangalore	67%	54%
Chennai	46%	28%
Kochi	55%	37%
Coimbatore	73%	39%
Hyderabad	64%	82%

Who we surveyed

TRA conducted telephonic interviews with 902 consumer-respondents from 16 Indian cities with sampling divided as per the city population as shown in the graph. 61% respondents were SEC A1, 32% were SEC A2, 5% were SEC A3. All respondents were between 21 years to 50 years of age, and 87.5% of the respondents were males.



About TRA Research

TRA Research, a Commiscent Group company, is a consumer insights and brand intelligence Company dedicated to understanding and analyzing stakeholder behavior through two globally acclaimed proprietary matrices of Brand Trust™ and Brand Desire™. TRA Research conducts primary research with consumers and stakeholders to assist brands with their business decisions based on Consumer Behavior insights.

TRA Research is consulting brands on transitioning during and after the Covid-19 crisis, to help them be more aligned to consumer and client expectations.

TRA Research is the also the publisher of TRA's Brand Trust Report™ and of TRA's Most Desired Brands™.

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