

White-paper

TRA's Coronavirus Consumer Insights

**A primary research covering 902 respondents
across 16 cities from 10th April to 22nd April, 2020**



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Backdrop

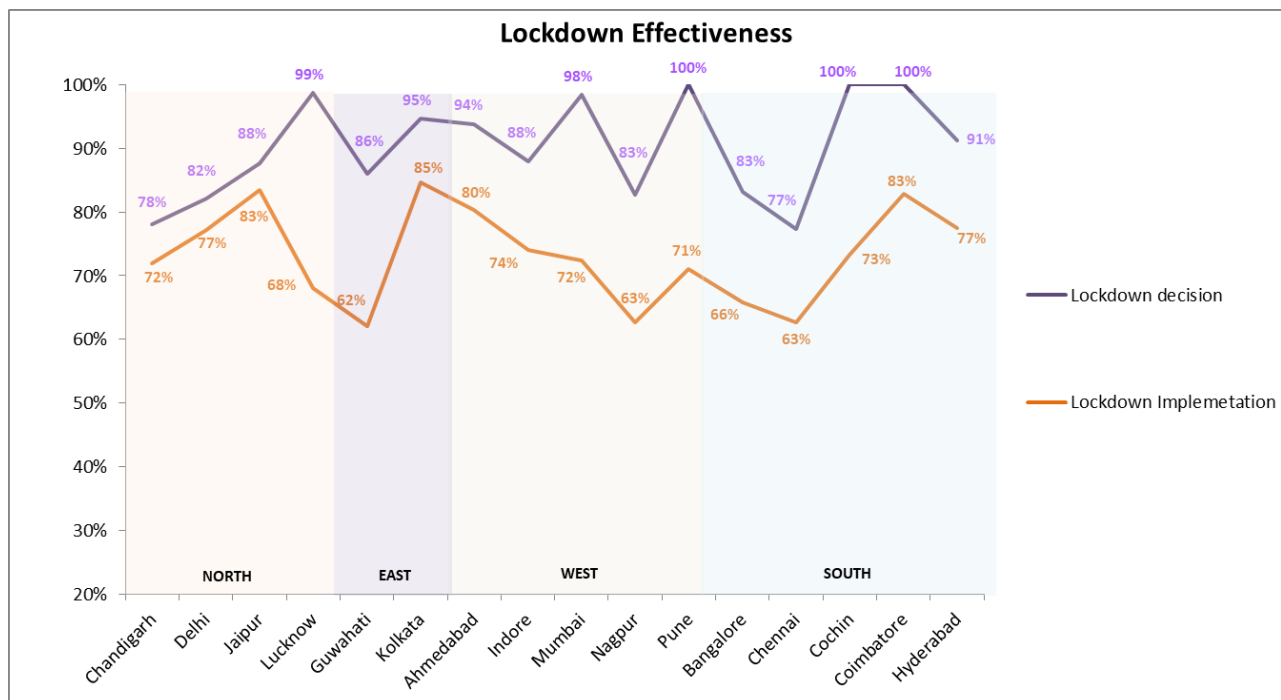
Imagine its end-2020. Things are back to normal. Work-From-Office is the norm, not Work-From-Home. We meet each other in person. Everyone shakes hands as a greeting, some even hug. Travel is possible, when one desires it. You can woo your sweetheart with a surprise dinner at her favourite restaurant, or buy a bottle of alcohol on your way back from work for a get-together you planned for a few friends. This used to be normal. But all of it seems like a half-finished, early morning dream that got rudely broken.

The Coronavirus pandemic, and the subsequent lockdown, has impacted everyone around the globe in almost the same way, some more and others less. In India, the lockdown has been on for nearly a month, with date set for 3rd May 2020, for the opening up. It is uncertain though, just like everything else.

TRA Research, a consumer insights and brand analytics company, brings you **TRA's Coronavirus Consumer Insights 2020, a whitepaper** from a research conducted across 16 cities with 902 urban consumers from 10th April to 22nd April 2020. This paper delves into the perceptions, attitudes, worries, fears and expectations of consumers who have been under voluntary house-arrest for nearly a month.

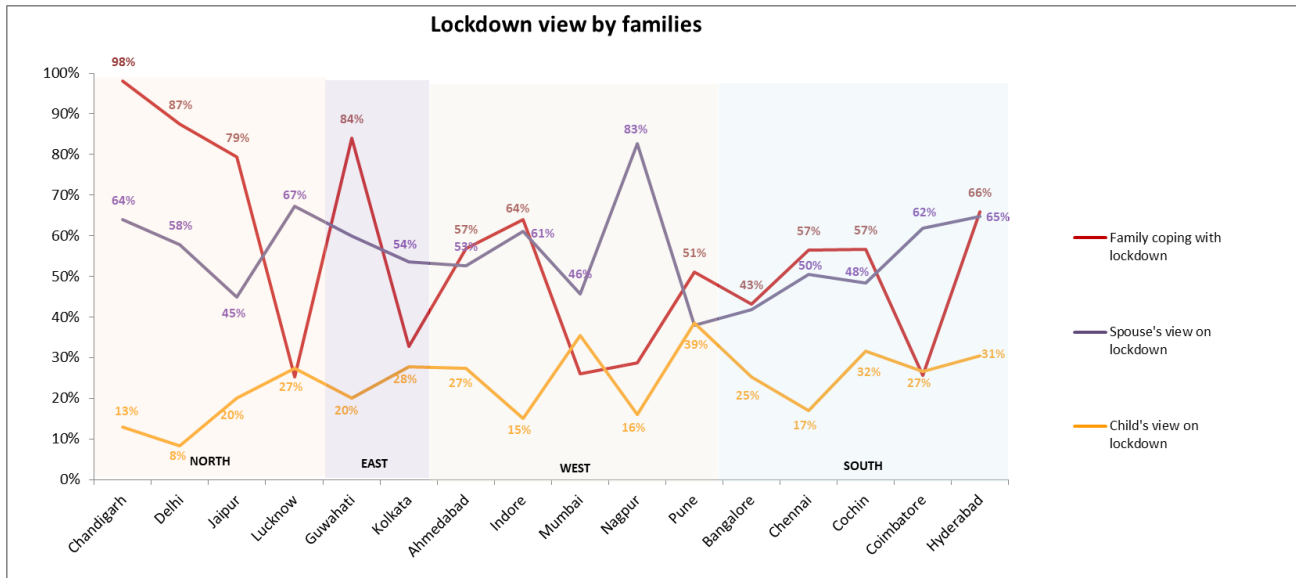
Lockdown Effectiveness

The overall Effectiveness of the Lockdown decision across cities was at 91%, with five of the sixteen cities giving it above 98% or 'Excellent' score. The overall Implementation Effectiveness across cities was however only at 74%. Chennai and Chandigarh rated the Lockdown decision lowest at 77% and 78% respectively. The Lockdown Implementation got a thumbs-up from Kolkata with 85% score, and Jaipur and Coimbatore, also gave it a 'Very Good' rating, with an Implementation Effectiveness score of 83%.



Guwahati scored lowest at 62%, with Chennai and Nagpur at 63%.

Coping with the Lockdown: families



The statistics prove that which is evident. Children dislike the lockdown quite strongly, with an average '(dis)approval' rating just 25%. While Children in Delhi and Chandigarh were not coping with the lockdown well, the family in these cities, quite inversely, was coping the best.

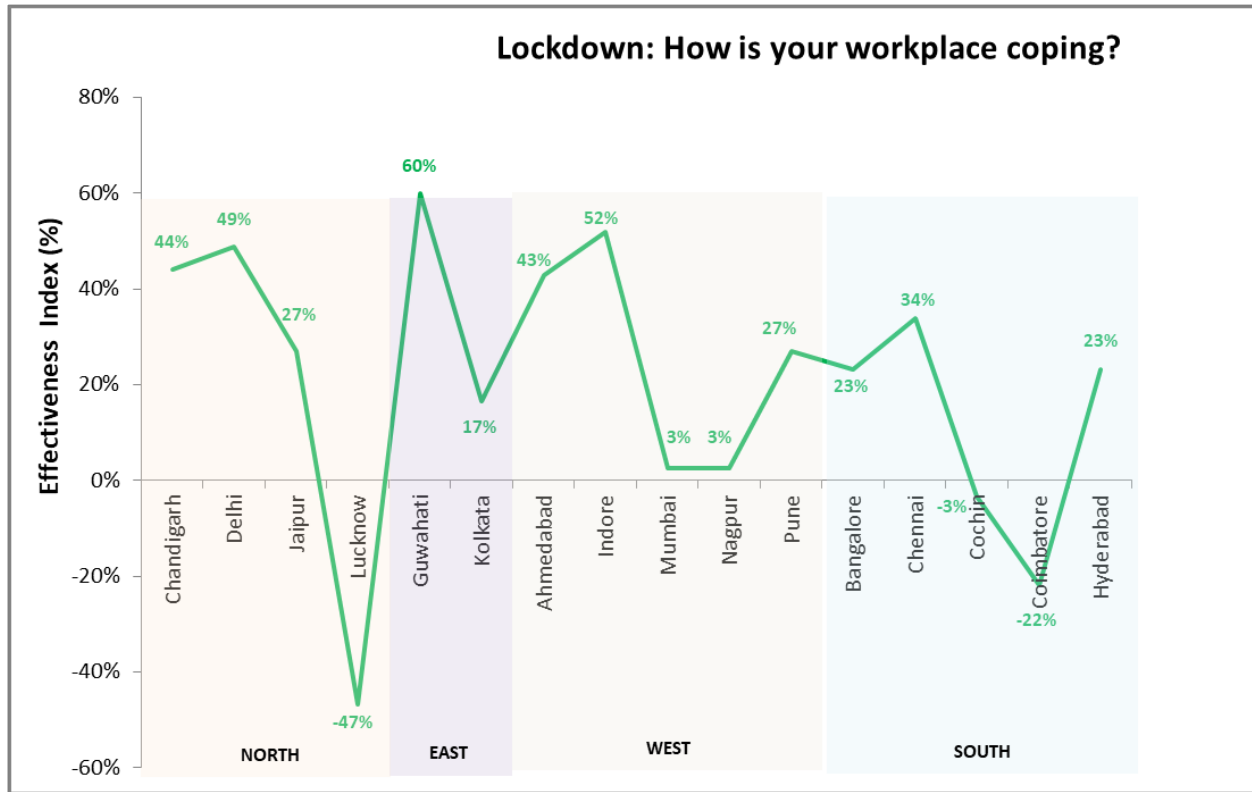


Children most impacted by the lockdown finding it difficult to cope

The respondents' spouse's view on the lockdown gets an average score of 53%, as also does the score for the family's coping with the lockdown (51%). There is a good chance that the child's challenges with the lockdown are being considered as an everyday tantrum, rather than being addressed directly, else the differences in the child's score and the family's score would not be so steep.

Home is everything during the lockdown – your restaurant, your theatre, your gym and naturally, this is where the most pressures are being felt too.

How the workplace is coping with the lockdown



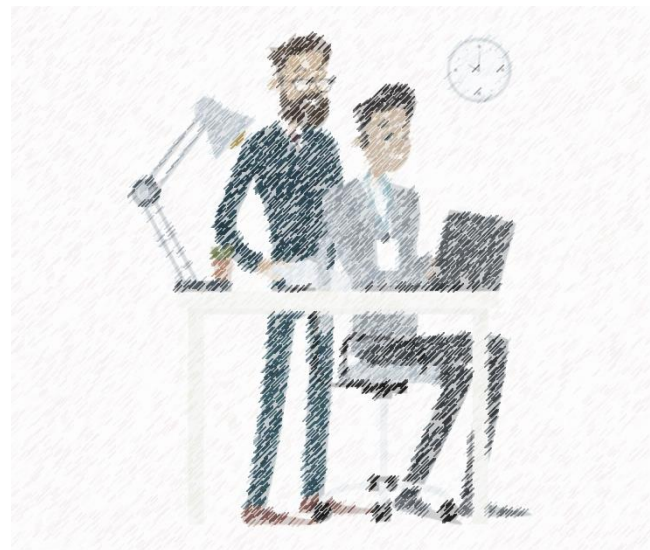
When we start using terms like WFO as an aberration than the rule, it in likelihood shows on the minds of the people. Not all companies or cities have been able to adapt to work related lockdown well, and it shows in this analysis.

Among metros, workplace coping with pandemic is best in Delhi, worst in Mumbai

When asked how the workplace is coping with the lockdown, the city responses varied sharply, with three cities showing a

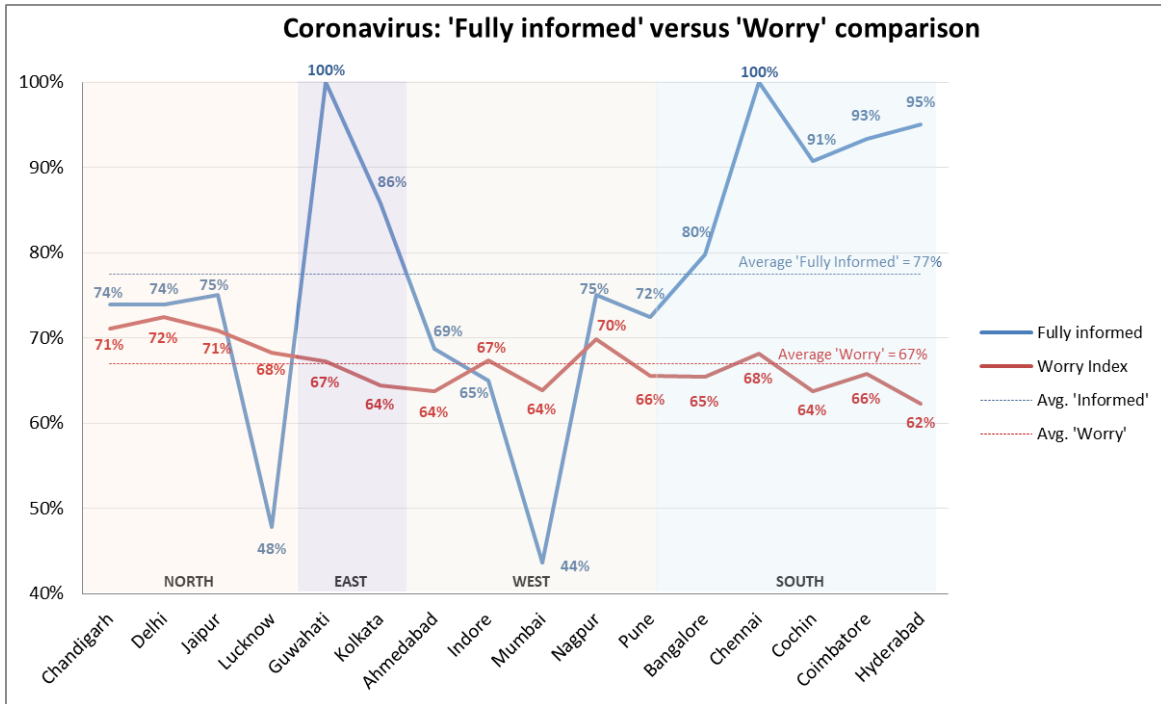
negative index, namely, Lucknow (Very Poor) Coimbatore and Cochin (Poor). Mumbai and Nagpur were marginally near zero or 'acceptable' line. Jaipur, Pune, Hyderabad and Kolkata feel that their workplaces are coping 'Good'.

The cities which have given 'Workplace Coping' Excellent rating are Guwahati (60%), Indore (52%) and Delhi (49%).



Pandemic 'Awareness' versus 'Worry' comparison

The awareness index of the disease was based on three respondent answers– 'Fully Informed', 'Somewhat Informed' and 'Not Informed', and only the first two were considered for calculating the awareness index. The Awareness Index shows sharp troughs and crests across cities, with regions showing specific trends.



Despite the large amounts of information available on Covid-19 through multiple sources, the city with the lowest 'Fully Informed' score is, quite surprisingly, Mumbai, at 44%. Lucknow has the second-lowest 'Fully Informed' score at 48%. Among the high scorers, Chennai's 'Fully Informed' score was 100%, a credit it shares with Guwahati.

'Fully Informed' score least in Mumbai, highest in Chennai & Guwahati



The average of all cities for the 'Fully Informed' score is 77%, and the region which scores the highest on this score is the East at 93%, despite Kolkata being at 86%. South is second best in 'Fully Informed' score at 92%, even though it is pulled down by the 80% score of Bangalore.

The respondents' 'Worry Index' average of cities, measured on six parameters about the disease and its implications to family, health and economy, is at 67%, which translates to 'Very Worried'. The North seems to worry the most, with Delhi display the highest

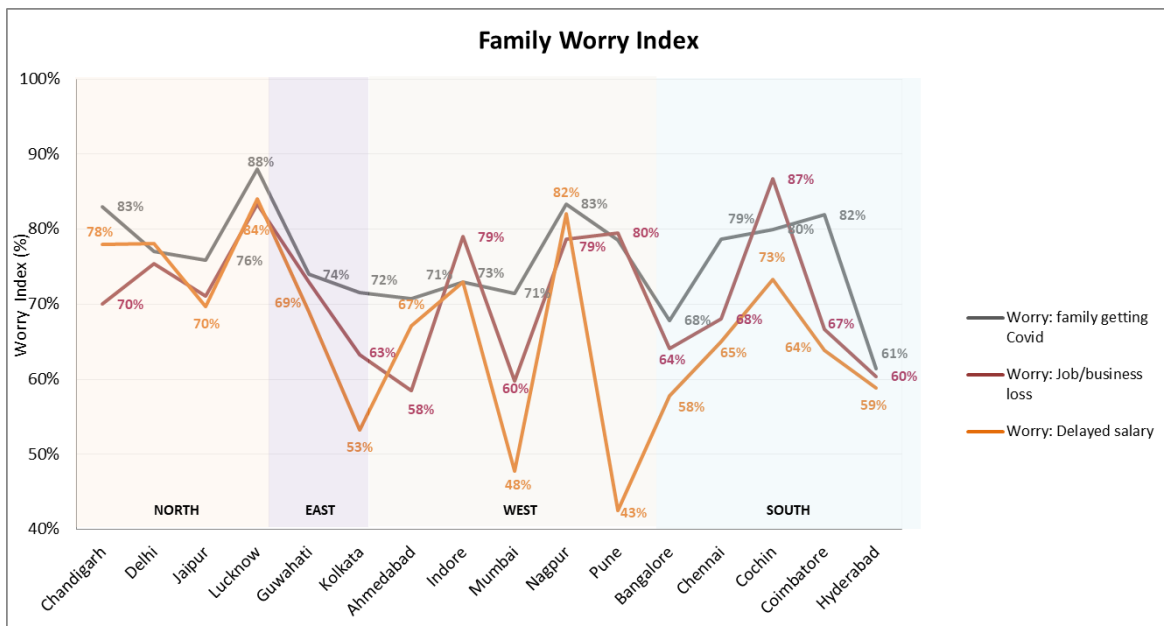
‘Worry Index’ at 72%. Close behind are Chandigarh and Jaipur at 71% each, and Nagpur is just marginally below at 70%. Other cities hover around the average and Hyderabad displays the least ‘Worry Index’ at 62%, bordering on ‘Moderately Worried’.

The ‘Worry’ Indices analysis

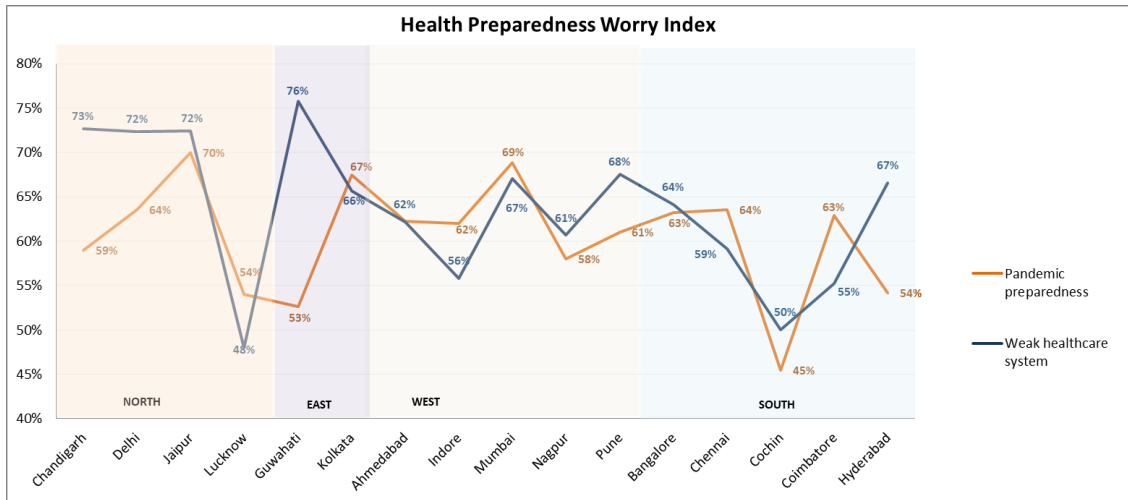
The ‘Worry’ Indices cover six questions in all, with three pertaining to family health and personal finances, two pertaining to Pandemic preparedness, and one regarding the Economic impact. The clubbed index was discussed in the section above. The overall Family Worry Index was at 68%, Pandemic Preparedness Worry Index was 65%, and the Economic Impact Worry Index was at 66%, showing that the personal worries overshadowed any other worry of the citizens.



Family concerns: In the Family Worry Index, the highest concern across cities was that the family may contract the disease (74%), Job/business loss was the second biggest concern (68%), and delayed salary was third (62%). Lucknow displayed the highest Family Worry Index at 85%, followed by Nagpur at 81% and Cochin at 80%. Mumbai and Hyderabad had the lowest Family Worry Index at 60%, with Bangalore and Kolkata close behind at 63% each.

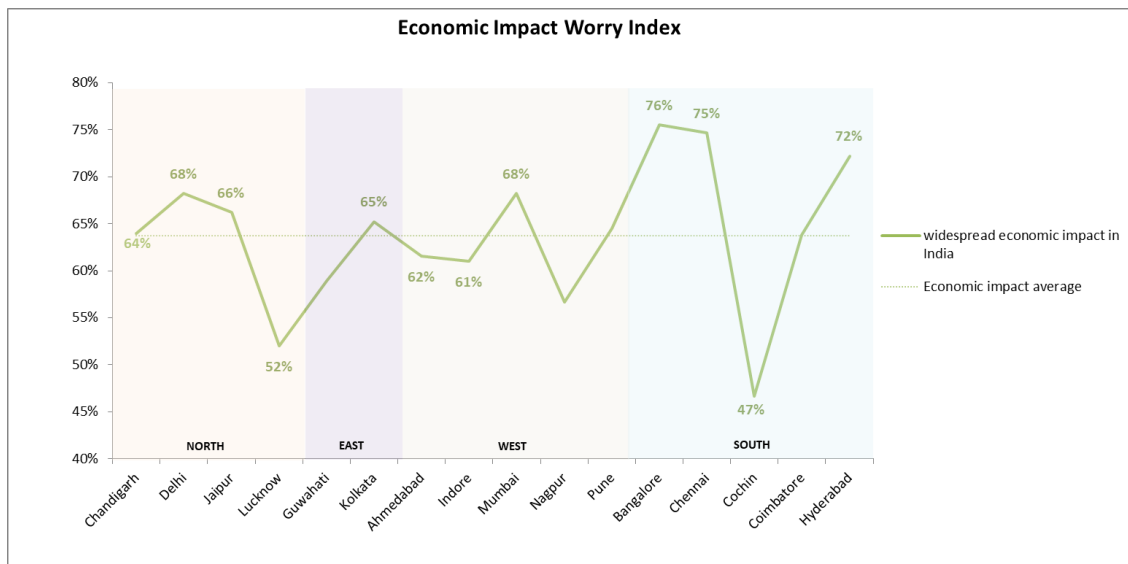


Health Preparedness concerns: The citizens seem less worried about India’s Health Preparedness, possibly due to family worries occupying much of their concerns. The Pandemic Preparedness Worry Index is at 63% and the Worry Index about India’s Weak Healthcare System was slightly higher at 66%.



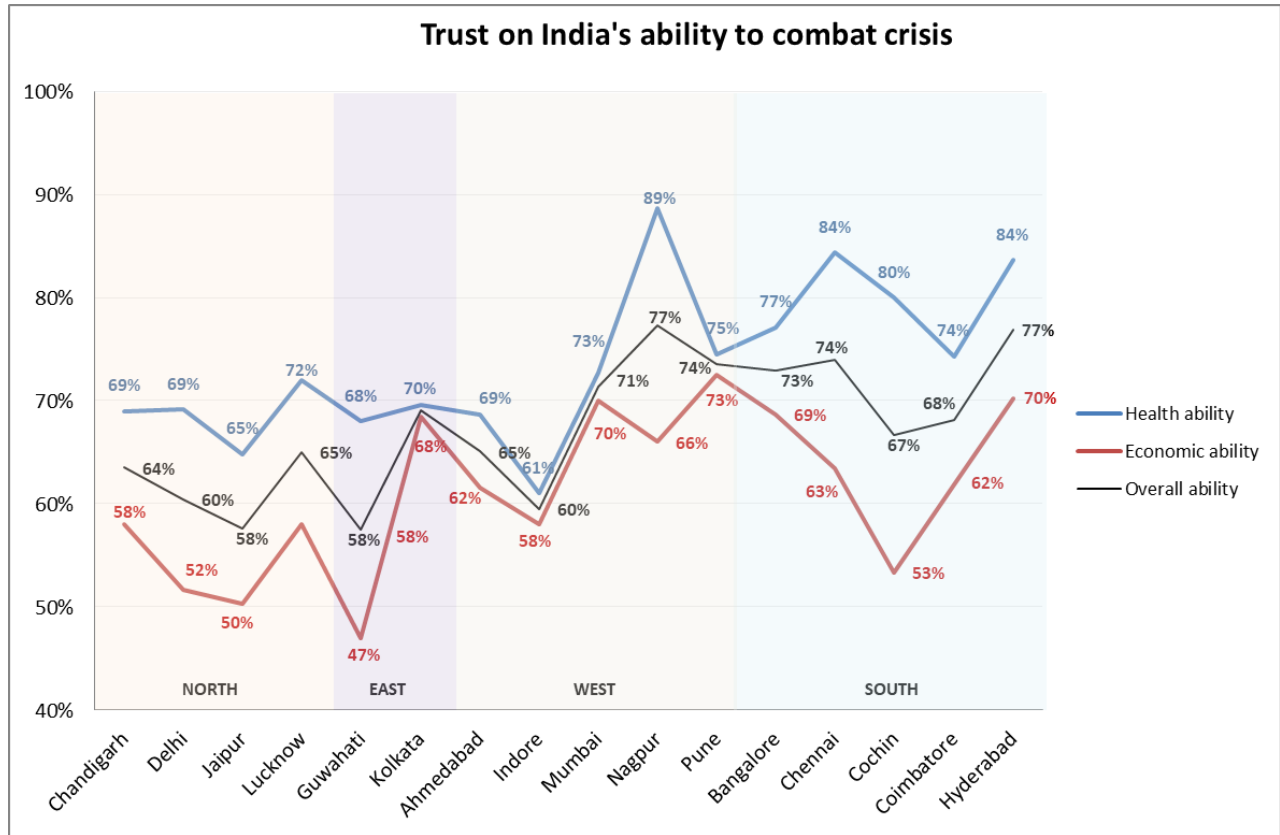
Economic Impact concerns: Bangalore and Chennai had the highest two concerns regarding the Economic Impact, at 76% and 75% respectively, followed by Hyderabad at 72%. The least Economic Impact Worry Indices were displayed by Cochin at 47% and Lucknow at 52%

The North region showed the highest combined Worry Index at 71%, some points above the national average of 67%.



Trust on India's Health and Economic ability to combat the crisis

Consumers' trust on India's Health Ability to combat crisis is considerably high, at 73%, while their trust on India's Economic Ability to combat crisis is significantly lower at 63%. Nagpur is most optimistic about the trust on India's Health Ability, at 89%, followed by Chennai and Hyderabad at 84% respectively. Indore's trust on India's Health Ability is the lowest among 16 cities at 61%, followed by Jaipur at a Health ability trust score of 65%.



On the other hand, the consumers' trust on India's Economic Ability to overcome the crisis is lowest in Guwahati, at 47%, followed by Jaipur at 50%. The highest optimism in India's ability to overcome the economic crisis is shown by Pune at 73%, followed by Mumbai and Hyderabad at 70%.

Maharashtra consumers' trust (considering the three cities of Mumbai, Nagpur and Pune) display the highest overall optimism about the ability to overcome the overall crisis (considering Health/Economic factors), at 74%. North India displays the lowest optimism (62%) with regard to the country's ability to overcome the overall Health/Economic crisis.



Knowledge gaps

Seventeen questions regarding knowledge of consumers on symptoms and transmission of Covid-19 were imparted to the respondents and accorded +10 for correct answers, -10 for wrong answers and -5 for 'Don't Know'. A heat map of age versus Knowledge quotient is shown to stark contrasts among different ages.

The highest Knowledge Quotient about Covid-19, symptoms and transmission is in the age group of 28 to 40 years. The lowest informed age-group on both symptoms and transmission is from 21 years to 24 years, followed by the age-group between 46 years to 50 years. It is, perhaps, these two age groups that need to be targeted specifically to ensure they are better informed.

The Knowledge Quotient on Transmission is only one-third of the Knowledge Quotient on Symptoms, showing a wide knowledge gap with many myths regarding transmission still weighing on minds of consumers. Just to make a point, many believed that the coronavirus is transmitted by eating meat, eggs or in unclean places, and more specific information needs to be disseminated to help break the myths of Covid transmission.

(*numbers show Knowledge Quotient)

AGE	Knowledge regarding COVID19 symptoms	Knowledge regarding COVID19 transmission
21 years	40	70
22 years	225	75
23 years	210	-25
24 years	625	105
25 years	1250	300
26 years	1070	340
27 years	1125	475
28 years	2045	1145
29 years	1380	410
30 years	4070	560
31 years	1610	490
32 years	1640	595
33 years	1315	540
34 years	1635	680
35 years	2455	650
36 years	1065	470
37 years	1355	560
38 years	2070	870
39 years	1030	425
40 years	3665	295
41 years	755	485
42 years	1380	665
43 years	600	250
44 years	540	80
45 years	1710	695
46 years	565	65
47 years	650	375
48 years	485	345
49 years	145	260
50 years	1180	425



City-wise Knowledge Quotient

While most cities are relatively aware about the disease symptoms, they are considerably ill-informed about the disease spread. Misinformation is highest about disease spread in Delhi (score -510) followed by Chandigarh (-145). These are followed by Lucknow (60), Cochin (140), Pune (160), Guwahati (185) and Indore (200).

Delhi scored the highest in terms of the knowledge on symptoms, followed by Mumbai which was nearly two-third lower in this quotient. Mumbai's Knowledge Quotient on Disease spread was the highest among all cities, taking its combined Knowledge Quotient to the highest among all cities. If knowledge and awareness are important parts of combating the virus, then the gaps are stark and evident.

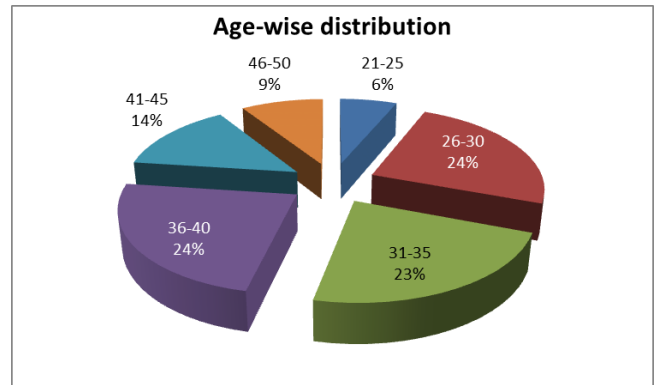
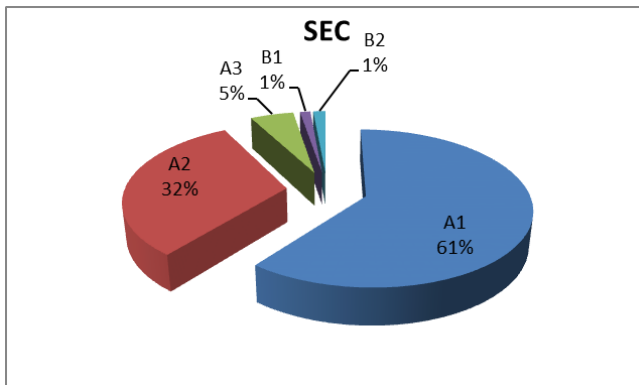
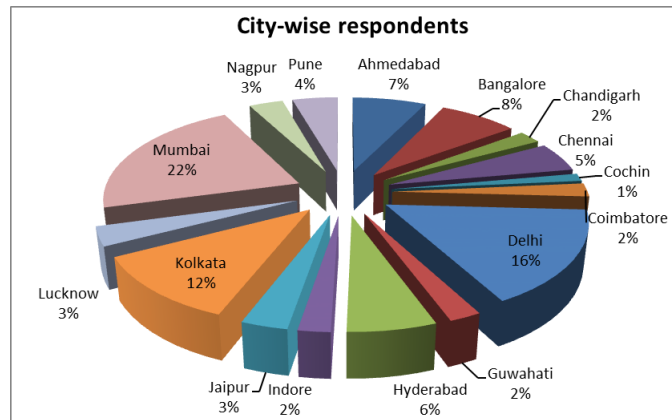
(*numbers show knowledge quotient)

City	Knowledge Score - Symptoms	Knowledge Score - Disease Spread	Knowledge Score - Overall
Chandigarh	1205	-145	1060
Delhi	8410	-510	7900
Jaipur	1170	305	1475
Lucknow	2080	60	2140
Guwahati	1080	185	1265
Kolkata	3680	1850	5530
Ahmedabad	2360	955	3315
Indore	950	200	1150
Mumbai	5210	5040	10250
Nagpur	1660	880	2540
Pune	370	160	530
Bangalore	3045	1425	4470
Chennai	2115	815	2930
Cochin	895	140	1035
Coimbatore	960	430	1390
Hyderabad	2700	885	3585

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 Comniscient 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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