

METHODOLOGY

BRAND TRUST REPORT 2022

Trust is not a solitary response, neither is it a sweeping brand metric. It is contextual and specific when it starts building. And as trust grows, it becomes more generalized and universal. Brand Trust can be understood as a 'framework of expectancy' a person uses in all social, emotional and commercial dealings, and when this expectancy is fulfilled, trust develops. One might expect a brand to deliver goods reliably and on time, however one may not have any expectations of the brand on the way it treats its workers. In the initial stages of trust formation in this case, the former expectation will have an impact on the trust quotient held for the consumer, while the latter expectation may not.

As trust develops in a brand over sustained time, consumers expectancy tends to evolve to include many more aspects of the brand, even those which are unrelated to the initial reasons for the trust placed. As trust grows, all key aspects which are important to the consumers in their personal lives, by extension, also become expected from the brands they trust as well.

Having understood trust to be the elemental aspect which impacts consumer behaviour, TRA spent hundreds of hours with psychologists, sociologists, anthropologists, and communication experts, to understand how the makeup of the human mind, society, culture, and communication impacts trust. This led to the creation of an intricate Brand Trust Matrix, with three nuanced layers comprising of 61 Brand Attributes, 10 Brand Behaviours and 3 Foundations of Trust.

In 2010, once the matrix was tested and honed, TRA launched a primary syndicated research study, one that would give every brand a quotient for Brand Trust. Starting with our first report in 2011 we have been conducting this research in 16 Indian cities with thousands of consumer-influencers each year. While TRA had the matrix which made up trust, it was Indian Statistical Institute, India's premier institute for training and research Statistics, which helped TRA create a Brand Trust Quotient.

This year, TRA's Brand Trust Report is in its 11th edition, and over time has become the most reliable source of authentic consumer trust perception held in brands. Scores of brands associate with TRA's Brand Trust Report every year, and over the years over 200 brands use our 'Power of Trust' symbol as a sign of surety to demonstrate consumers' trust held on them. A similar number of brands use the consumer insights on Brand Trust that TRA's research studies provides. As custodians of trust, we take the onus of maintaining the integrity of the report, its methodology and its rigour, with extreme seriousness.

This year we conducted the research with 1617 consumer-influencers across 16 Indian cities among three target groups, working men, working women and home influencers. We included the last of the respondent set about three years ago after feedback from brands on the importance of the home influencer. At a similar time, the methodology too was refined to add a question on the brand category for each brand mentioned in the questionnaire. As simple as it may sound, when this query is asked for each brand response by the respondent, it increases the length of the questionnaire by one-third in length. The results due to these two inclusions were tedious but made the outcomes of TRA's Brand Trust Report much more robust.

This year's report is special, as it comes after two years of Covid, the pandemic which has altered the perception of relative importance of everything. Many facets which seemed crucial earlier, seem irrelevant now. Brands were unheard of before, have jostled to get their share of minds and wallets. One important advisory with regard to the current report, considering that it is being launched in the midst of the Russian invasion on Ukraine, with global repercussions on people, countries, financial institutions and brands.

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BRAND TRUST REPORT 2022

The fieldwork for the current years report ended on 3rd March 2022, just five days after the invasion started, so the impact of the current global flux is not reflected in the report.

UNDERSTANDING THE BRAND TRUST COMPONENTS

Attempting to quantify something as universal as Trust was not without challenges. The matrix and the study's methodology were under everyone's glare. The science of the Brand Trust Matrix had to be proven and its universal applicability had to be explained, and with perseverance, most of our clients use it as their most important brand metric.

Brand Trust is layered into Brand Trust Attributes, Brand Trust Behaviours and Brand Trust Archetypes. These can be understood as messages, personality and foundations of trust that the brand exudes.

A brief explanation of the foundations is given below:

Brand Trust Foundation	Explanation
Building Capacity to Trust	An environment of Trust is essential for Trustor to assume the necessary vulnerability needed for the trust bond to form. The essential need of this foundation is that the brand must emanate messages and signals that make stakeholder feel comfortable to let their guard down. It has to emerge from a perceived genuineness of the brand. The Brand Behaviours that make up this foundation are: <ul style="list-style-type: none">• Non-Threatening Ambience• Shared Interest• Display Empathy
Creating Perception of Positive Intent	To reinforce consumer trust, brands should display that their intent is benign. The energetic vibe of optimism attracts consumers towards it. Consumers are constantly recalibrating the intent of brands, and small behavioural slips can make them rescure their trust. On the other hand, brands that display their positive intent over long periods of time inevitably beget consumer trust. Perception of a brand's positive intent reflects in three Brand Behaviours which are: <ul style="list-style-type: none">• Demonstrated Sincerity• Altruism• Enthusiasm
Demonstrating Relevant Competence	The Third Foundation of trust highlights the importance of consumers assessing a brand on its ability to fulfil their tangible expectations. Brands need to display their competence and expertise to garner consumer trust by successfully carrying out the promise they claim. By doing so they prove to be worthy for the position they hold. <ul style="list-style-type: none">• Outward Appearance• Perceived Competence• Commanding Respect• Accepting Responsibility

DESIGNING THE QUESTIONNAIRE

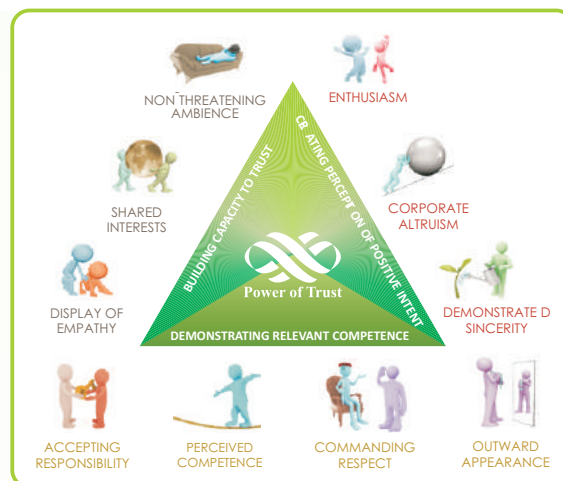
A well-designed questionnaire is crucial to any good syndicated research. Even more so, when the study is attempting to capture consumer perceptions on something as subtle as Brand Trust.

The Brand Trust Questionnaire has three parts to it:

- Recall Quotient:** Each respondent was asked to name five of local, national, and international brands that came to mind. This allowed the interviewer to bring out several brands from the respondent's active memory along with their free associations, as well as reduced selective channelization. While this part of the questionnaire had no implication on the Brand Trust Index, by power of association, it made the actual brand response on Brand Trust more stratified.
- Sub-Conscious Brand Trust Quotient:** In the second part of the questionnaire the respondents were asked to name three brands most suited to each of the 10 Brand Behaviours of Trust. Further, they were then asked to give a suitability score for each brand on a 5-point scale for the Brand Behaviour

mentioned. Finally, the respondents gave the category of the brand mentioned. This part of the response is called Sub-conscious trust because the respondents consciously may not be aware that these Brand Behaviours make up trust.

- c) **Conscious Trust Quotient:** In the third part of the questionnaire, responses recalled in response to 'Most Trusted Brand Name' helped extract conscious trust exhibited by respondents. As in the previous part, respondents also provided the brand's category and a suitability score on a 5-point scale, corresponding to a numeric value for the brand's trustworthiness.



FINDING THE RIGHT RESPONDENTS

The respondents of this study are the consumer-influencers of brands, the 10% of the consumers that exert influence on the remaining 90% in their brand decisions. To ensure that the study captured the perceptions of consumer influencers, several distinguishing criteria were set. Also, three distinct sets of respondents who have an influence on brands was chosen for the study.

The three major groups of respondents were Salaried Males, Salaried Females and Home Influencers. The other criteria for selection of the respondents were as under:

General criteria

- Age criteria – 21 to 50 years
- SEC – A/B only

Home influencer criteria

- English & one local/ regional language proficiency with above 3 out of 5 score on speak, read & write
- Home influencer influence score to be 4 out of 5 in each of the below criteria

Purchasing electronic item/s at their home

Recommendation on branded products purchase done by their friends

Selection on the next education institution of her child/ward

Residing in a society with 100 or more flats

For salaried respondents

Monthly salary income more than INR 20,000/-

Must be employed in an organization having:
more than 200 employees across branches (pan-India)

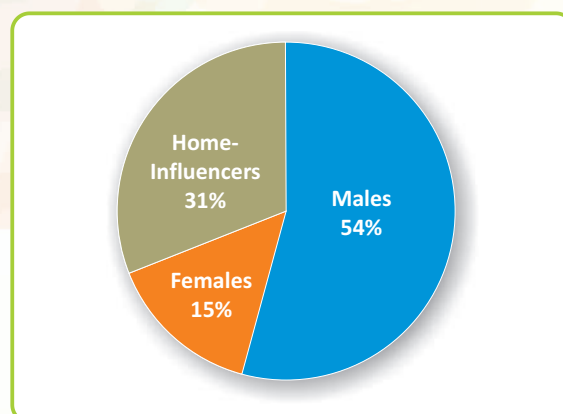
OR

must be employed in an organization having more than INR 50 Crores turnover

Must not be employed with a courier company, Public Relations, Market Research, Advertising, BPO, or KPO

Not more than 15 interviews to be conducted in any one organization across its offices in India

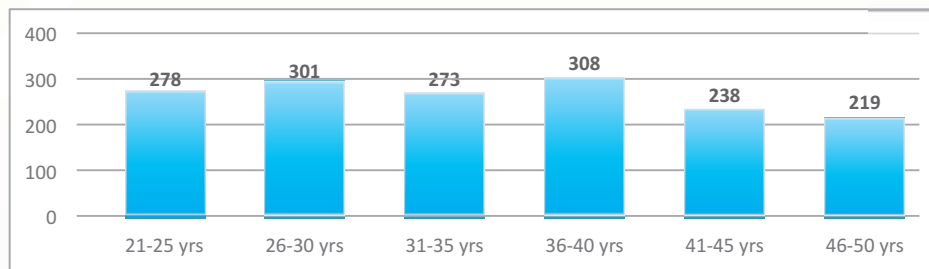
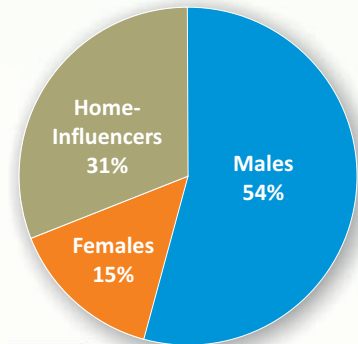
Visiting cards were to be collected from every respondent



SAMPLING CRITERIA

a) Gender and age-based criteria

The total gender and age sampling was done on the basis of the census division among the 16 cities. Among the women, the home influencers and salaried women were in the ratio 67% & 33% respectively.



b) City-based criteria

16 cities were considered for the survey, representative of urban India. The number of respondents sampled in each city depended on the GDP of the city, as it was most representative of transactions in the city.

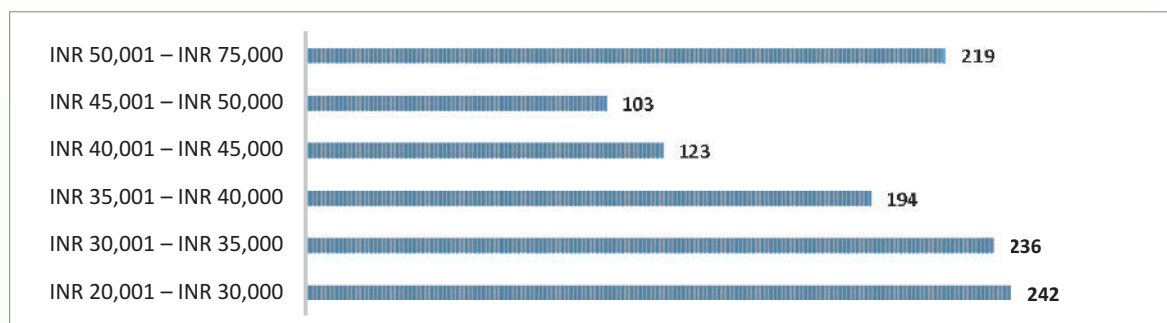
Cities covered

North	Delhi, Lucknow, Chandigarh, Jaipur
East	Kolkata, Guwahati
West	Mumbai, Pune, Ahmedabad, Nagpur, Indore
South	Chennai, Hyderabad, Bangalore, Coimbatore, Kochi

Derived respondent demographics

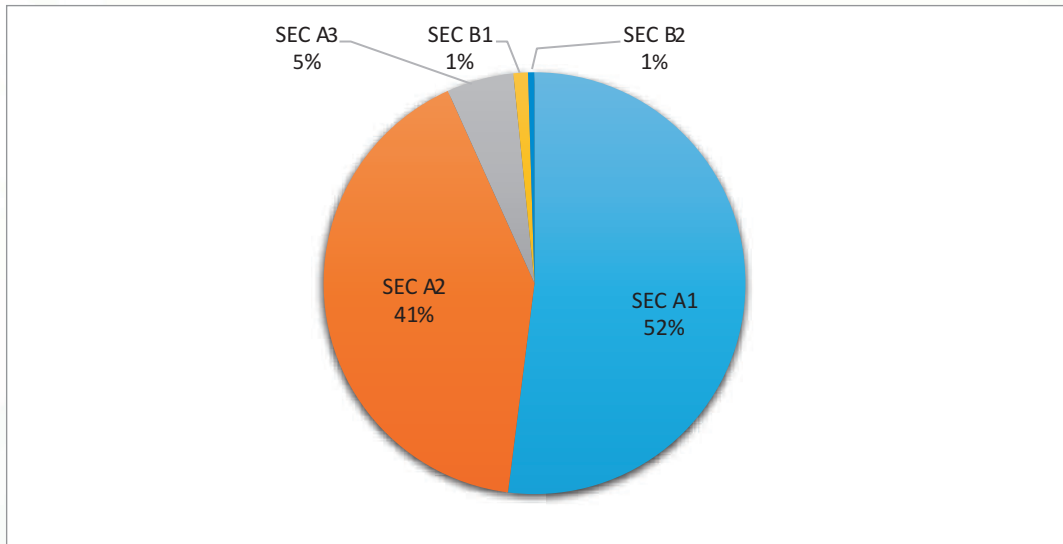
a) Income-based demographics

The respondents had a monthly income exceeding INR 20,000 as shown by the graph of income distribution given below



d) SEC-based criteria

841 (52%) respondents were from SEC A1, 41% were SEC A2, 5% respondents were from SEC A3 and 1.6% were from SEC B1 & B2



COLLECTING THE DATA

The fieldwork was conducted between 15th December 2021 and 3rd March 2022, by more than 300 fieldwork personnel, Each interview took an average of 25 minutes, thus adding up to more than 670 hours of total research time. Nearly 0.35 million data points were collected and more than 8,000 unique brands emerged from the study.

Due to the evolving circumstances, conducting face-to-face interviews increased health risks for interviewers as well as respondent. In addition, travel restrictions and social distancing measures made fieldwork challenging and where physical interviews were not possible, telephonic interviews were conducted.

TRA surveys were conducted using an app specifically created for the purpose. Not only does it capture brand data more accurately than Paper-and-Pen-Interview (PAPI), but it also captures several parts of the interview that facilitate

- Respondent authentication
- Voice Recognition
- Geo-Location
- Time stamping
- Home-door pictures/visiting cards



Respondent authentication



Voice Recognition



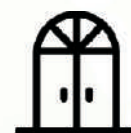
Geo-location



Time stamping



Visiting Card



Home Door Pictures

TRA insists on data accuracy with multiple level of scrutiny. Interviewers' testing, process quality, 100% back-checks, stringent quotas, data inspection at multiple levels, all of which ensured extremely high scrutiny.

MEASURING THE BRAND TRUST INDEX (BTi)

The Brand Trust Index® is a subtle measure of Brand Trust and takes into account the overt and covert Brand Trust influences – those aspects of Brand Trust that normally remain hidden from scrutiny.

The three measured parameters on Brand Trust were:

- Frequency – number of times a brand gets mentioned across all the interviews
- Position – the average position that the brand was mentioned on - first, second or third, among the three brands asked for each brand query
- Suitability – the average suitability that the brand was given on a rating scale of one to five

This part of the Brand Trust Index® can be represented as:

$$\frac{SD_0}{SD_i} \times P_{5i} \times O_{5i} \times X_{5i} \times 0.5$$

The other direct and visible influence on Brand Trust® was the respondent's replies to the question on the Most Trusted Brands. Additionally, this parameter is also measured on the same three parameters as above and is multiplied by 0.67 to equate the five-point scale of conscious trust to the three-point scale of the sub-conscious trust. The second part of the Brand Trust equation can be represented as

$$P_{7i} \times O_{7i} \times X_{7i} \times 0.67 \times 0.5$$

The addition of these gave us the Brand Trust Index, represented by the following formula:

$$\frac{SD_0}{SD_i} \times P_{5i} \times O_{5i} \times X_{5i} \times 0.5 + P_{7i} \times O_{7i} \times X_{7i} \times 0.67 \times 0.5$$

Where:

- SD₀ represents overall brand suitability score standard deviation
- SD_i represents all ith brand suitability standard deviation
- O_{5i} represents ith brand occurrence frequency of the Brand Trust question
- P_{5i} represents ith brand average positions of Brand Trust question
- X_{5i} represents the ith brand average suitability
- O₇ represents the brand frequency of occurrence of the Recall question
- P_{7i} represents all ith brand average positions of the Recall question

APPLICATIONS OF BRAND TRUST™

a) Power of Trust' Symbol

Over 200 brands license the 'Power of Trust' symbol as sign of surety that their brand is trusted by consumers. The 'Power of Trust' symbol has been used in marketing communications of brands in ATL advertising, POP, product packaging, social media, email signatures, among other ways. The brands which feature as Most Trusted in many of TRA's reports, use it to profess the brand's ability to garner the trust of consumers in successive years.



b) Consumer Insights Report

Several brands commission TRA for the consumer insights analysis called Buying Propensity Report as intricate insights are available in the syndicated study. Some brands have used the Buying Propensity report to discuss future-relevant strategies, while some investment bankers and PE funds use this data to make investment decisions in other brands. The applications of the Buying Propensity are only limited by the imagination of the brand.

c) Introspective Intervention

The most interesting part of the application of TRA's Brand Trust methodology has been when brands have commissioned TRA for doing a bespoke study with the brand's stakeholders using 'The Brand Trust Matrix' to bring recommendations to align internal actions to stakeholder Trust.

d) Brand Counsel

TRA helps brands align their external brand and communication initiatives to Trust, Desire and Buying Propensity, creating Trust Audits for agencies to ensure all messages are aligned to gaining better brand trust, by giving the brand a complete consumer-centric approach.