



PUBLIC PERCEPTION ANALYSIS DURING LOCKDOWN: Lessons for Sustainability

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GLOBAL
STRATEGIC
COMMUNICATIONS
COUNCIL

- **How are people experiencing the lockdown?**
- **What are the big changes in sentiment, esp towards cleaner cities, less traffic and clean air?**
- **What do people feel about WFH?**

1082 RESPONDENTS ACROSS 10 CITIES

Gender	Percentage
Males	60%
Females	40%
Age	
25 – 34	59%
35 – 44	32%
45 – 55	10%
SEC	
NCCS A	80%
NCCS B	20%
Employment status	
Employee	70%
Self-employed	30%
Total Base	1082

Cities	Percentage
Mumbai	10%
Delhi NCR	10%
Chennai	10%
Bangalore	10%
Hyderabad	10%
Kolkata	10%
Jaipur	10%
Ahmedabad	10%
Pune	10%
Surat	10%
Total Base	1082

Survey Insights

- **PRIORITIES-** 6 out of 10 people enjoying the time they can spend with family. 9 out of 10 are saving time/money.
- **CHANGE IN BEHAVIOUR-** 7 out of 10 people want to continue working from home if that keeps the city and the air clean.
- **PERCEPTIONS-** 8 out of 10 people believe that WFH and less commute will keep the air cleaner.
- **IMPACTS-** 9 out of 10 people said air pollution impacts them personally(health)
- **BENEFITS-** both practical and environmental



SUMMARY

- While these movement restrictions have resulted in lesser pollution, cleaner air, people are also expecting the government to play their part in this maintenance – with a majority (65%) concluding that the government should launch programs that ensure industries go pollution free.
- Half of the population identify lack of proper infrastructure at home, irregular routine schedule and reduction in team bonding as their top struggles.
- However, in spite of challenges, majority of them (70%) are willing to continue working from home post the lockdown is lifted.
- This willingness might be good news for employers who also see benefits of wfh – 9 out of 10 think that their company has saved on operational expense during this time of increased wfh.

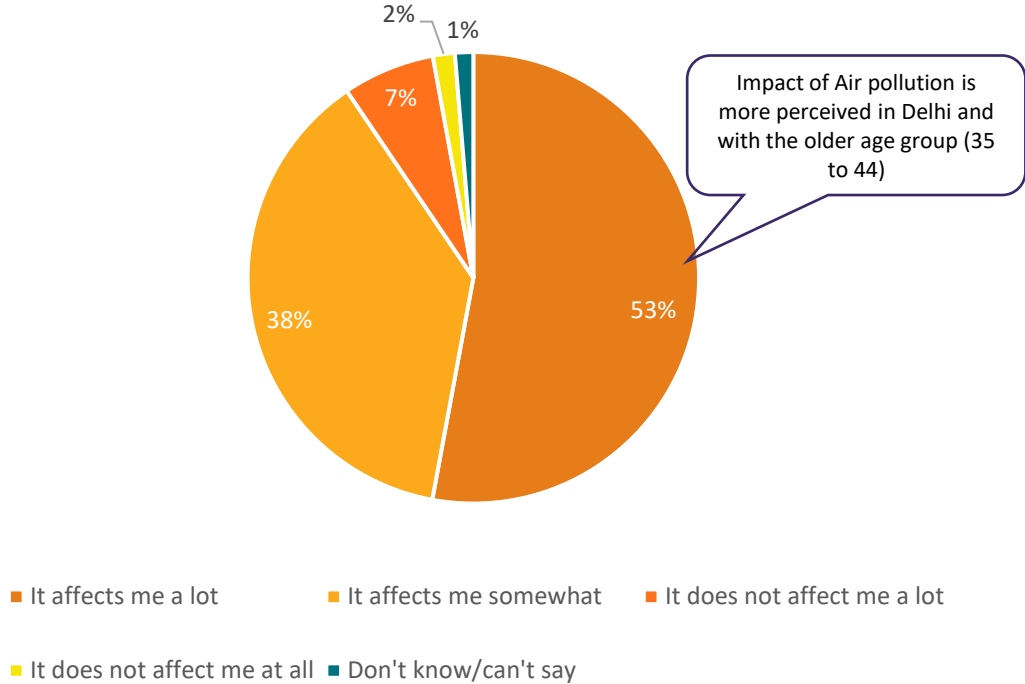
Survey Findings



Indians believe air pollution to be a pervasive problem - more than 90% feel that it impacts them personally.

Evidently, its not just a perception of impact – 1 in 2 also say that they suffer from air pollution related health problems.

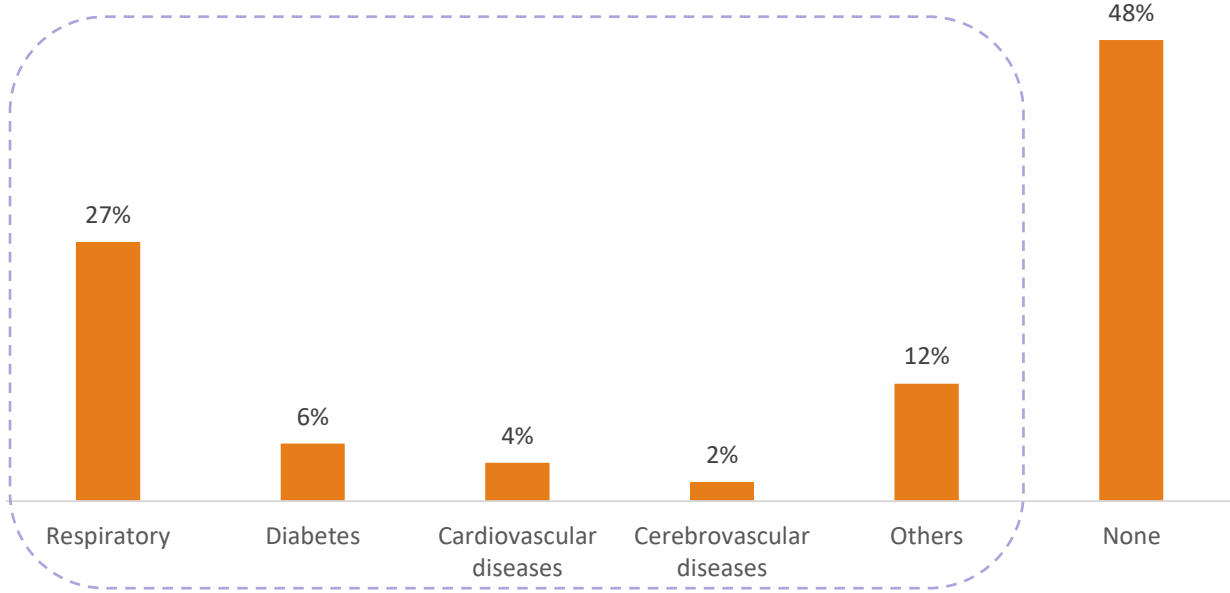
Perceived Impact Of Air Pollution



Base: 1082

QAP1. To what extent would you say air pollution affects you personally?
 QAP2. What air pollution related health problem do you suffer from?

Air Pollution Related Health Problem



Base: 980

*Top 2 box analysis

Therefore, it is not surprising that Indians would be willing to take steps to maintain this fortuitous reduction in air pollution triggered by the COVID-19 induced lockdown.

Interestingly, fewer people would be willing to take the route of public transport/shared mobility to do so - indicating people wants to maintain social distancing

Measures To Maintain Reduction In Traffic, Pollution Levels

Measures People Are Willing To Take	Overall %
I would consciously choose to walk for shorter distance	62%
I would demand to work from home as it will reduce congestion from roads and lead to cleaner air	60%
I would be willing to buy EVs (Electric vehicles) provided the charging infrastructure is in place across the country/in the states around me and prices are made affordable	49%
I would use shared mobility options for cleaner air and less traffic	46%
I would consider public transport options more often as it has environmental & health benefits	41%
I would use public transport for short distance travel	37%
Average	49%

Base: 1082

QAP3. The COVID-19 pandemic has led to many people staying in. This has resulted in reduced traffic, lesser pollution and cleaner air. Keeping that in mind, which of the following, if any, would you do to maintain the same? Please select all options that apply.

People are also expecting the **government** to play their part in this maintenance – with many believing that industries, historically the biggest polluters, should be encouraged to toe the line.

Measures The Government Should Take To Maintain Reduction In Traffic, Pollution Levels

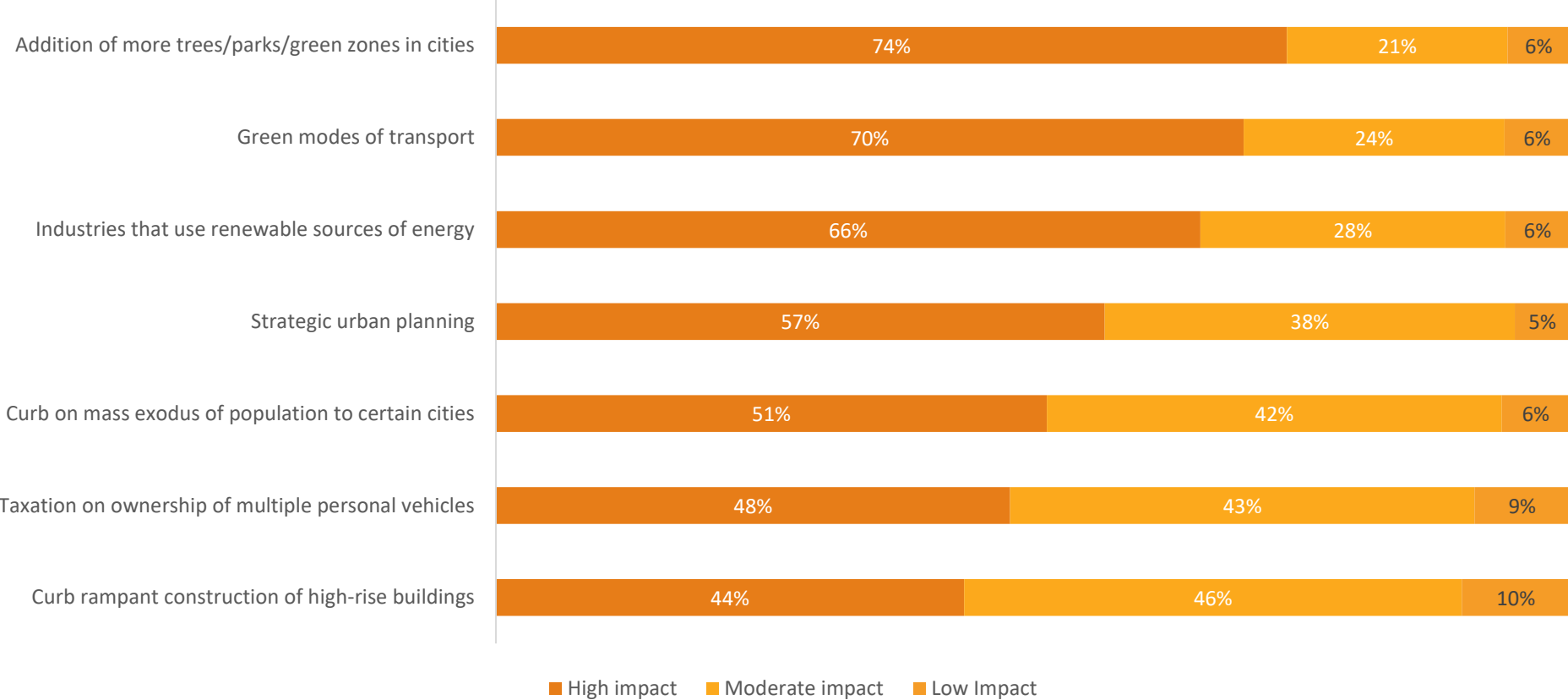
Measures People Want The Government To Take	Overall %
Government should launch a time-bound program for industries who are harmful to environment (e.g. chemical industry, steel and cement industry etc.) to go pollution-free	65%
Government should focus on restoring the ecological balance (protecting the forests & wildlife) in and around my city	64%
Government should incentivize buying Electric Vehicles (EVs)	59%
Government should prioritise funding for more electric public transport	57%
Government should gradually open up the roads allowing only people to walk and cycle	57%
Government should move from highly polluting coal power stations and diesel generators to solar, wind and hydropower	57%
Average	60%

Base: 1082

QAP4. The COVID-19 pandemic has led to many people staying in. This has resulted in reduced traffic, lesser pollution and cleaner air. Keeping that in mind, which of the following, if any, should the government do to maintain the same? Please select all options that apply.

Overall, people believe that *going green* via additional parks, eco-friendly transport and industries using clean energy, will have the highest impact on reducing levels of pollution.

Measures To Reduce The Levels Of Pollution



Base: 1082

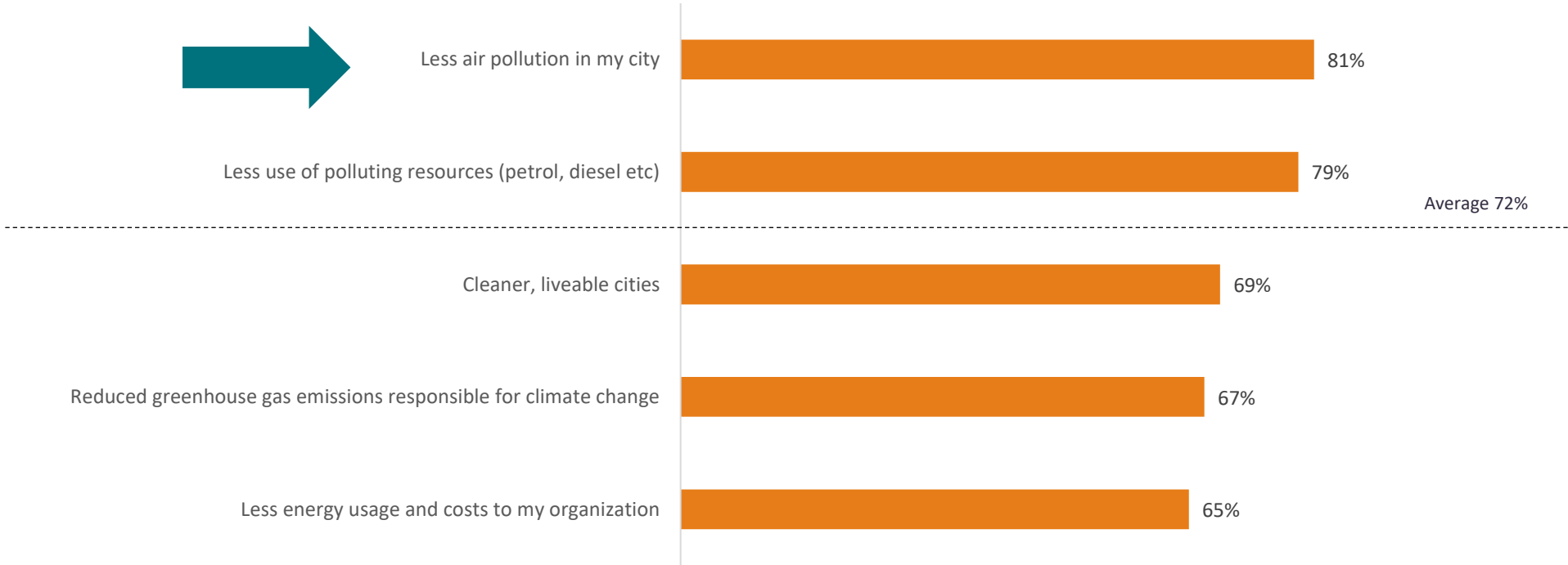
At an overall level, which of the following, if any, do you think would have the most impact to reduce the levels of pollution?

Survey Findings



And while *going green* is one way to reduce overall levels of pollution, 8 out of 10 feel that working from home will reduce air pollution in their city

Environmental Benefit Of WFH

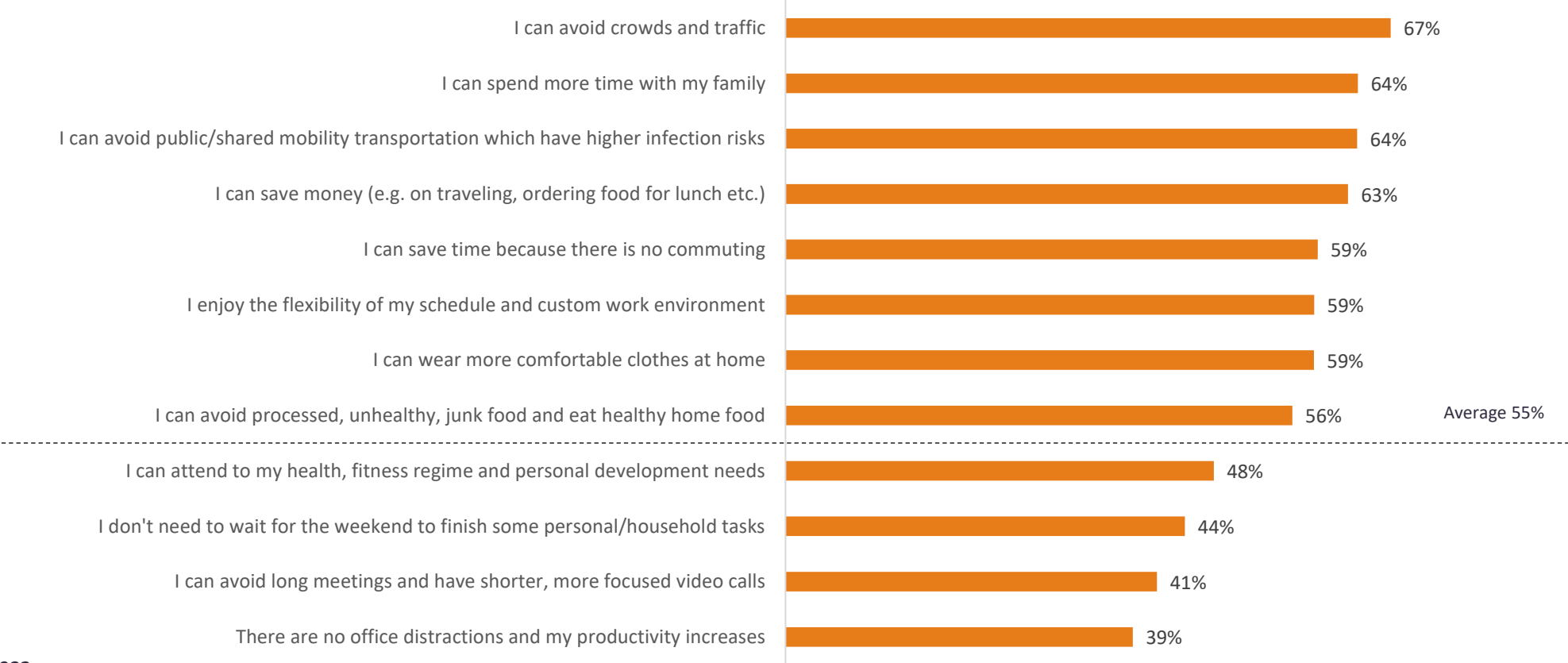


Base: 1082

MQ2a. Thinking a little more about advantages, which among the following, if any, do you consider as environmental benefits to working from home? Please select that all apply.

WFH evidently creates a win-win situation practical and environmental benefits - more time with family and saving money as important as avoiding traffic

Advantages Of WFH



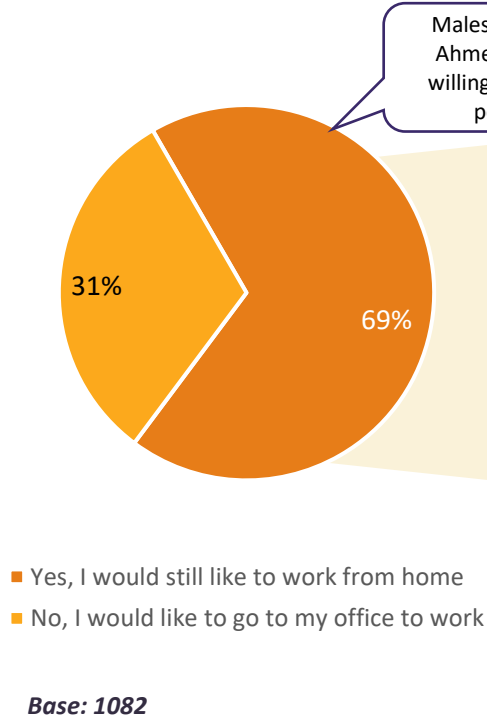
Base: 1082

MQ2. According to you, what are the advantages of working from home? Please select that all apply.

Evidently continued WFH post lockdown is a viable option for many – and most would like to do so to not only avoid traffic, but to enjoy the resultant clean air

WFH the entire month!

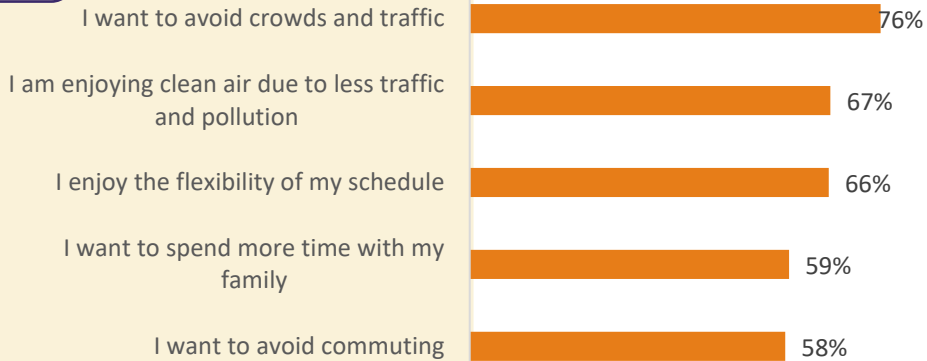
Willingness To Continue WFH Post Lockdown



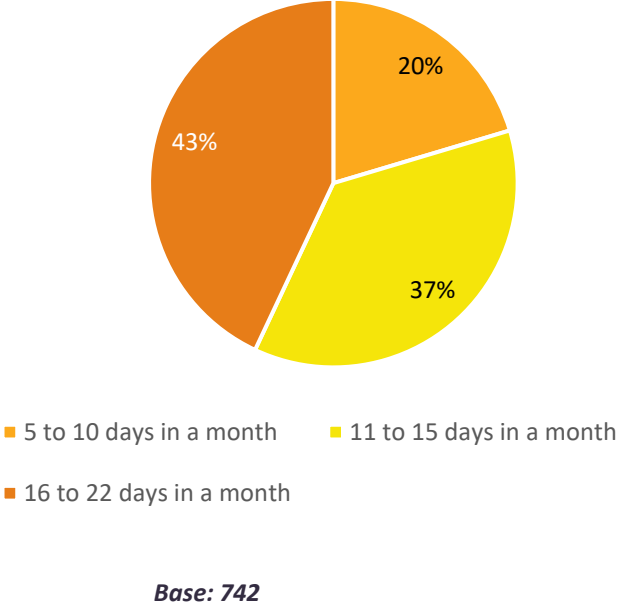
Males and people from Ahmedabad are more willing to continue WFH post lockdown

Also, people who are currently working in Technology sectors more willing to continue WFH as compared to people who are working in Banking & finance and health & Pharmaceutical sector

Reasons Of Continuing WFH



Number Of Days Willing To WFH

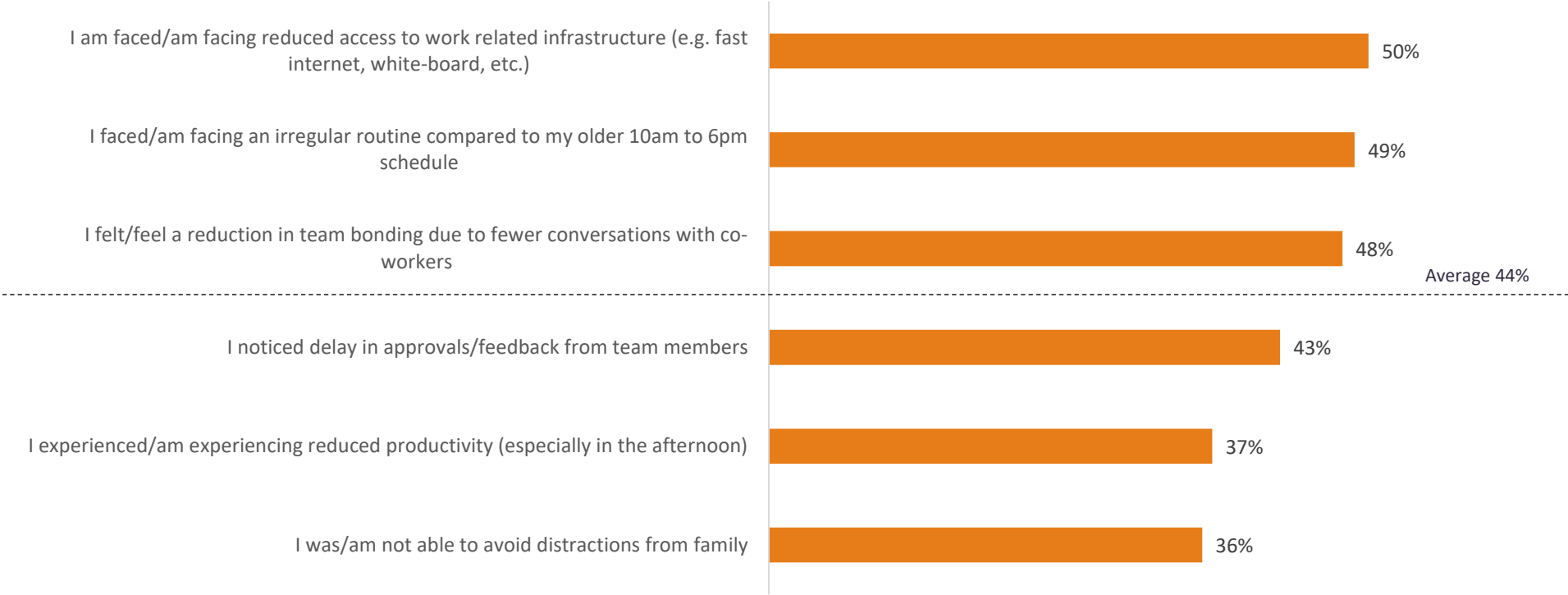


MQ4. Once this lockdown is lifted, would you still like to continue working from home?
 MQ5. What are some of the reasons because of which you would still like to continue working from home?
 MQ5a.. There are roughly 22 working days in a month, how many days do you think you can work from home and be equally or more productive than when working form office?

But while most people want to *WFH*, challenges exist – reduced access to work infrastructure, irregular work routine, decreased team bonding top the list for people.

This indicates that along with the practical, the emotional aspect of wellbeing is also on people’s minds when it comes to *WFH*.

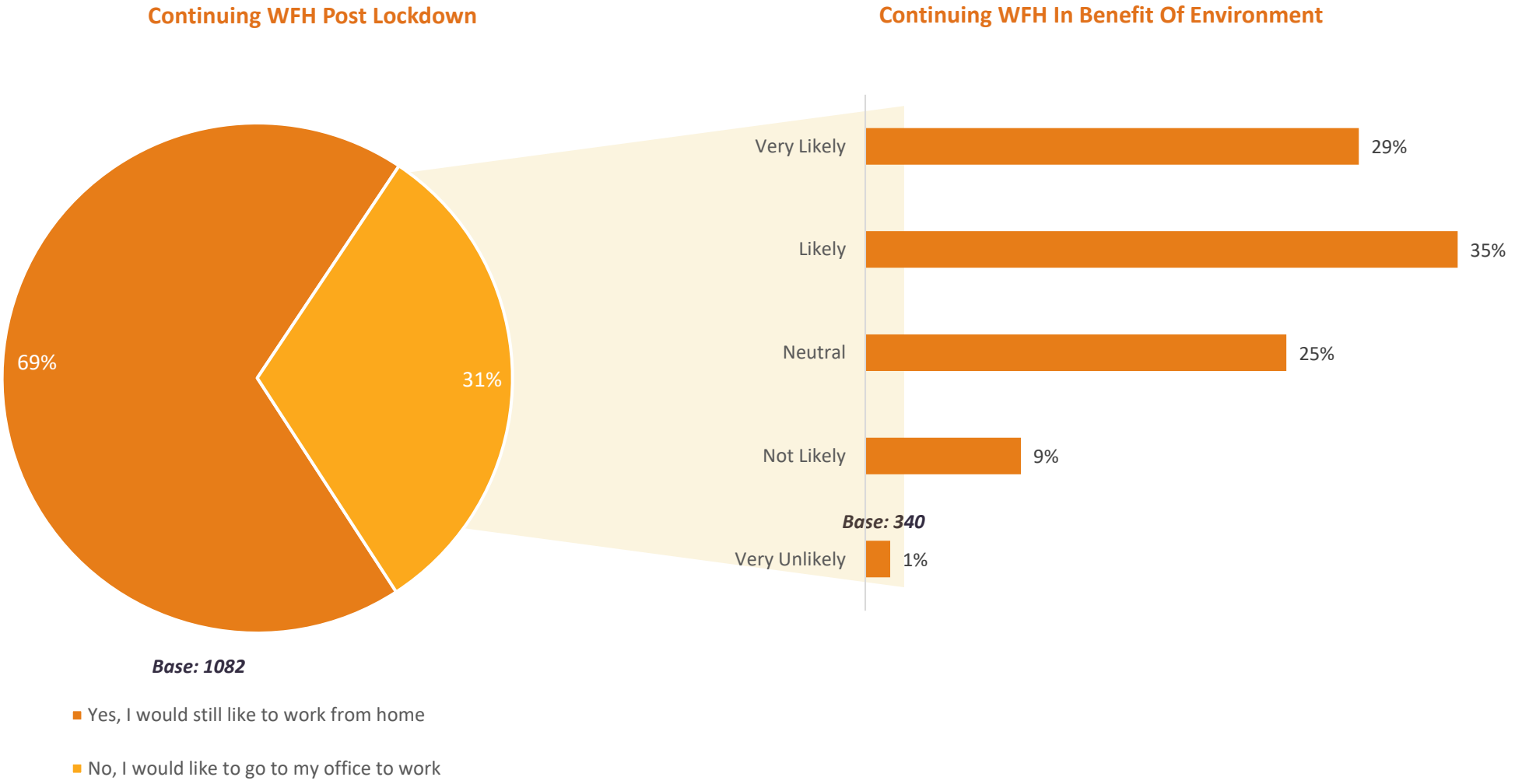
Challenges Of WFH



Base: 1082

MQ3. According to you, what were the challenges you experienced while working from home? Please select all that apply.

And even if some are not immediately ready to continue WFH, a *nudge* that involves communicating its resultant environmental benefits might influence people's decision.

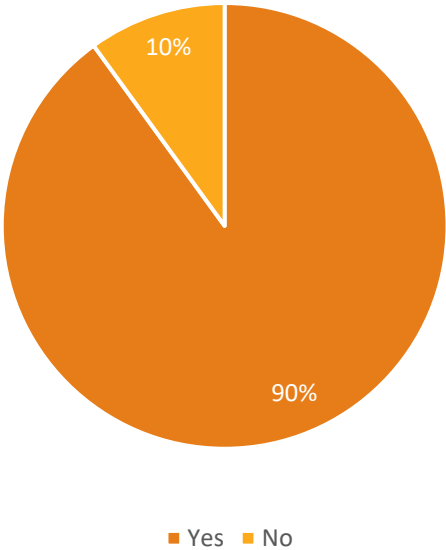


MQ4. Once this lockdown is lifted, would you still like to continue working from home?
MQ6. Many articles theorize that by opting to work from home, there are larger benefits to the society. The air gets cleaner, cities less congested and there is an overall reduction in pollution. In this situation how likely are you to want to work from office?

Employers also see benefits to WFH- 9 out of 10 think that their company has saved on operational expense

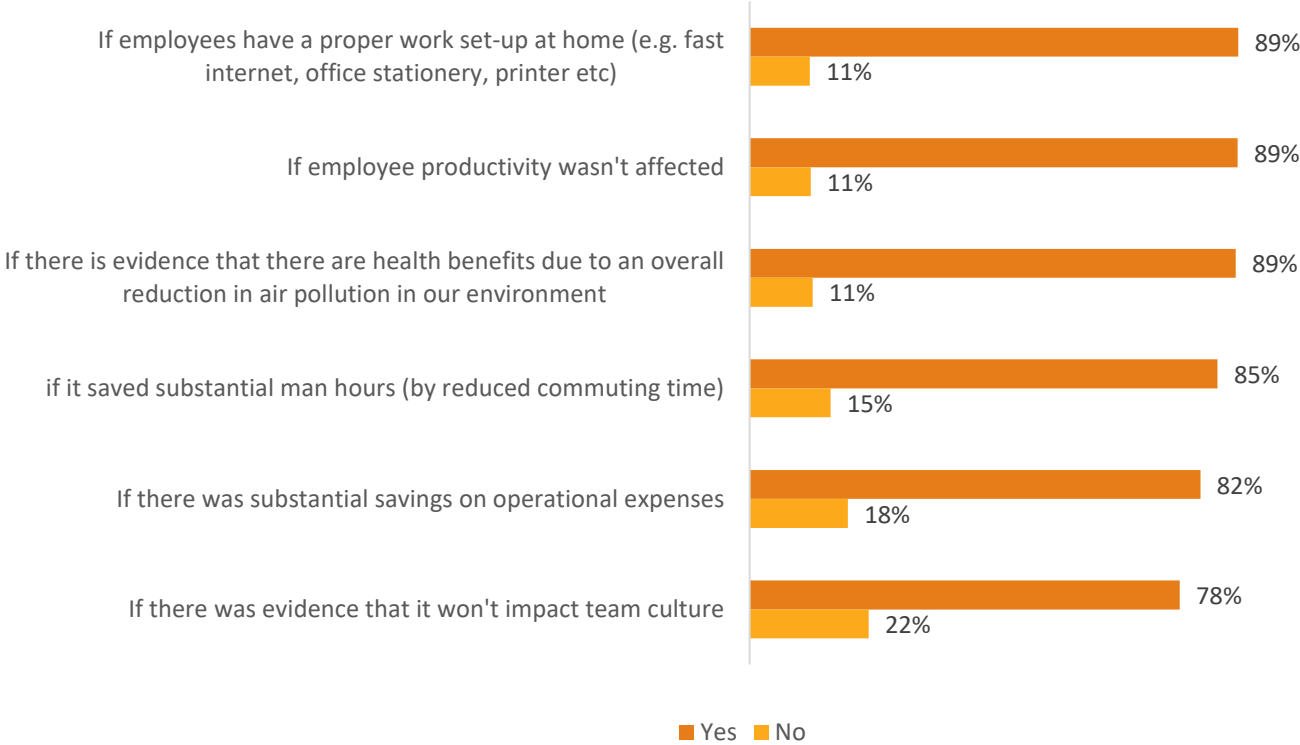
...and they would encourage *wfh* if proper work infrastructure is in place, and productivity is maintained.

Has Company Saved On Operational Expenses Since Employee Was Asked To WFH



Base: 248

Situation In Which Company Will Encourage Employees To WFH



MQ7. As an employer do you think your company saved on operational expenses since employees were asked to work from home?
 MQ8. The COVID-19 pandemic has made many industries re-design the way they work. One of the most common ways, has emerged to be 'work-from-home'.
 From the following, in which situation would companies allow/encourage their employees to work from home?

SUMMARY

PEOPLE ARE LIVING THROUGH PARALLEL CRISES AND ARE AWARE OF IT

BRINGING THE WORLD TO A GRINDING HALT WILL BRING 7-8PC DROP IN ANNUAL EMISSIONS- TACKLING CLIMATE CHANGE NEEDS FIXING STRUCTURAL AND SYSTEMIC ISSUES.

PUBLIC PERCEPTIONS HAVE CHANGED. IT WILL TAKE TIME TO CHANGE BEHAVIOUR.

CHANGED PERCEPTION MUST BE SEIZED WISELY FOR A LONGER TERM VIEW OF REDUCING POLLUTION, EMISSIONS, AND STRESS ON OUR RESOURCES. (POLICY MAKING)

STIMULUS HAS BEEN ANNOUNCED- LET'S NOT WASTE A CRISIS. MAKE IT GREEN!

