SUSTAINABLE MOBILITY NETWORK

CMSR Consultants
fostering sustainable partnerships

SURVEY ON

CONSUMER PERCEPTIONS AND INSIGHTS IN THE LAST MILE DELIVERY SECTOR FOR THE TRANSITION TO ELECTRIC VEHICLES (EVS)

ACRONYMS

Acronym	Full Form
AQI	Air Quality Index
CAPI	Computer-Assisted Personal Interviews
CBR	Corporate Business Responsibility
CSR	Corporate Social Responsibility
ESG	Environmental, Social and Governance
EV	Electric Vehicle
FGD	Focus Group Discussion
ICE	Internal Combustion Engine
NGO	Non-governmental Organization
TV	Television
CSR	Corporate Social Responsibility
ESG	Environmental, Social and Governance
EV	Electric Vehicle
FGD	Focus Group Discussion
ICE	Internal Combustion Engine
NGO	Non-governmental Organization
TV	Television

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EXECUTIVE SUMMARY

1. CONTEXT, OBJECTIVES AND METHODOLOGY OF THE RESEARCH

The last mile delivery sector is a critical component of the modern economy, serving as the final link between businesses and consumers in various industries including e-commerce, food delivery, hyperlocal grocery delivery, and logistics. In recent years, there has been a growing emphasis on sustainability and environmental responsibility, leading many companies to consider transitioning their last mile delivery fleets to electric vehicles (EVs). This consumer survey, conducted across 10 cities in 5 Indian States including Delhi, Mumbai and Pune (Maharashtra), Asansol and Kolkata (West Bengal), Coimbatore and Chennai (Tamil Nadu), and Ahmedabad (Gujarat), aims to evaluate key indicators of sustainability, especially those around electrification of fleets of companies operating in the last mile delivery space based on consumer insights. These indicators will enable progressive companies to effectively communicate their transition plans and EV scenarios and will serve to encourage other companies to take substantial actions.

The research employed a mixed-method approach, involving quantitative surveys with 3,752 respondents and qualitative focus group discussions in four cities (two tier 1 cities and two tier 2 cities, each city representing different regions). To ensure a robust representation, 3800 respondents were targeted, with 380 individuals sampled from each city, achieving a 95% confidence level with a 5% margin of error. However, due to some non-responses or incomplete responses, the final dataset comprised 3752 respondents. The respondents for the study were chosen randomly from each city.

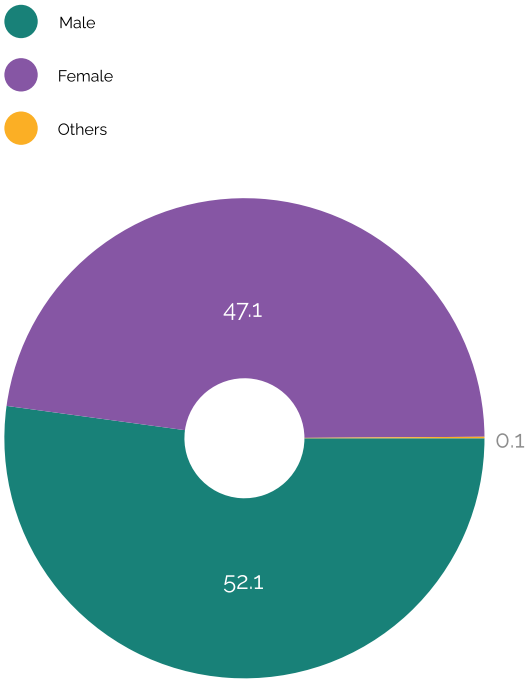
Ethical considerations were prioritised, including informed consent and data confidentiality. Quantitative data was analysed using statistical tools, while qualitative insights were derived from focus group discussions.

Table 1: Sample Achieved

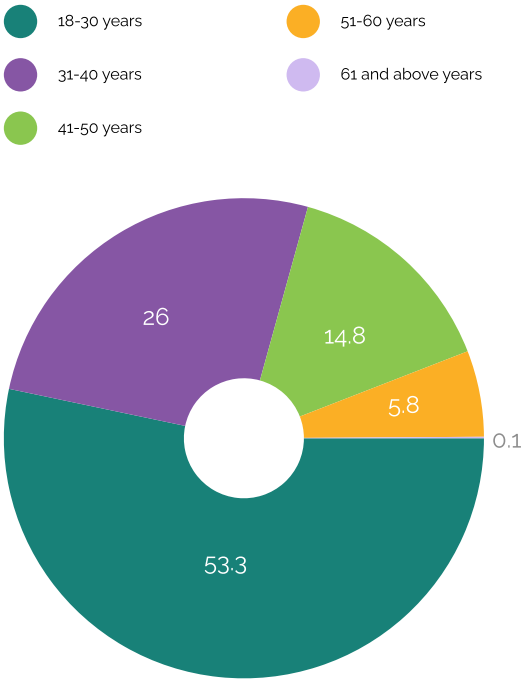
State	City	Sample (Quantitative)	Sample (Qualitative)
Delhi	Delhi	380	1 (20 participants)
Gujrat	Ahmedabad	370	1 (20 participants)
Karnataka	Bangalore	372	
	Hubli-Dharwad	374	
Maharashtra	Mumbai	380	
	Pune	380	
Tamil Nadu	Coimbatore	380	1 (20 participants)
	Chennai	372	
West Bengal	Asansol	373	1 (20 participants)
	Kolkata	371	
Total		**3752**	**4 (80 participants)**

2. DEMOGRAPHICS OF THE SURVEY PARTICIPANTS

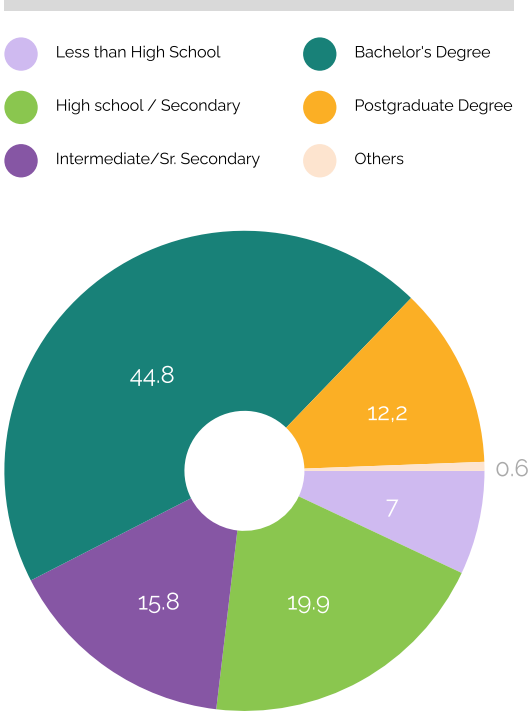
GENDER



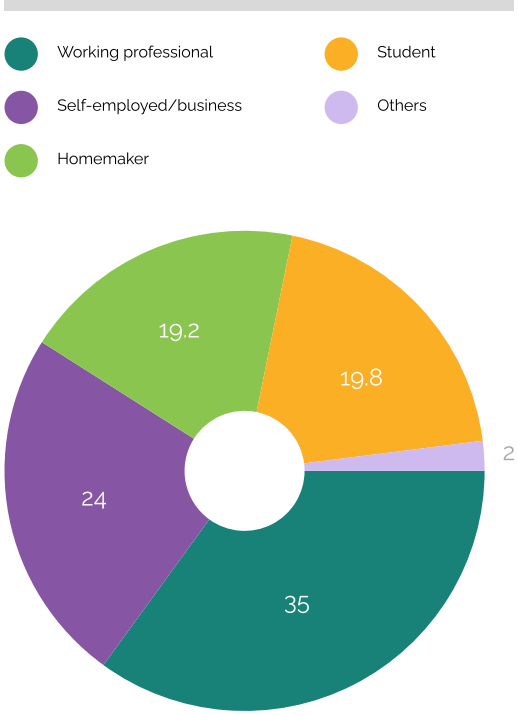
AGE GROUP



EDUCATION



OCCUPATION



3. KEY FINDINGS:

OVERALL AWARENESS OF AIR POLLUTION (AIR QUALITY INDEX), EMISSIONS REDUCTION, ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG) REPORTING AND EV TRANSITION OF FLEETS.

AWARENESS AND UNDERSTANDING ABOUT AIR POLLUTION:

75% of respondents across various cities demonstrated a high or moderate level of awareness regarding air pollution. Cities with the highest awareness levels included Pune/Pimpri-Chinchwad (73%), Chennai (49%), and Bangalore (46%). 56% of respondents expressed dissatisfaction with air quality. Particularly high levels of dissatisfaction were observed in Delhi (86%) and Asansol (84%). 84% of respondents believed air pollution in their cities was increasing, with the highest proportions in Bangalore and Pune/Pimpri-Chinchwad (97% each).

AWARENESS OF AIR POLLUTION MITIGATION MEASURES:

Primary measures adopted to address air pollution included the use of masks (67%), restriction of outdoor activities during poor air quality days (35%), reducing driving or using alternative transportation (34%), and employing air purifiers (26%).

FAMILIARITY WITH CORPORATE BUSINESS RESPONSIBILITY (CBR) ON AIR POLLUTION ACTION AND EMISSION REDUCTION:

48% of respondents demonstrated a moderate level of familiarity with corporate responsibility on air pollution and emission reduction. Age-wise, respondents in the 18-30 age group showed the highest familiarity (40%). 69% of respondents received information regarding companies' initiatives for AQI reduction from social media. Consumers also learned about this through news articles and word-of-mouth.

FAMILIARITY WITH ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG) REPORTING:

59% of respondents were aware of companies' Environmental, Social, and Governance (ESG) compliance initiatives, most of whom learned about these through informal channels like advertisements, posters, and company promotions rather than formal reports. A notable proportion of respondents find it easy (59%) or very easy (24%) to comprehend company reporting on various areas of ESG, though some (16%) stated difficulties in understanding them.

PERCEPTION ON THE IMPORTANCE OF ELECTRIC VEHICLE (EV) ADOPTION AND TRANSITION OF FLEETS BY COMPANIES:

A staggering 98% of respondents expressed the importance of electrifying companies' fleets to combat air pollution and climate emissions. Pune/Pimpri Chinchwad exhibited the highest percentage (83%) of respondents emphasising the importance of EV adoption, followed closely by Asansol (78%) and Kolkata (70%).

4. KEY FINDINGS:

ASSESSMENT OF EXISTING COMPANIES' COMMUNICATIONS:

EFFECTIVENESS OF COMMUNICATION ON AIR POLLUTION ACTION:

55% of respondents found companies' communication regarding air pollution reduction effective to some extent, 37% considered it very effective. However, there is room for improvement, as 8% found it not effective at all.

EFFECTIVENESS OF COMPANIES' COMMUNICATION ON CLIMATE INITIATIVES:

Half of the respondents felt that companies communicate their climate change mitigation and emission reduction efforts somewhat effectively through products or services. Men and older respondents tended to view companies as more effective in their communication efforts.

CONSUMERS AWARENESS OF COMPANIES' COMMITMENTS TO TRANSITIONING TO EVS:

43% of respondents were aware of e-commerce, food delivery, and courier companies' commitments to transitioning to EVs. Pune/Pimpri Chinchwad, Chennai, and Coimbatore emerged as cities with higher awareness levels, whereas Asansol had notably lower awareness (3%). Younger age groups showed higher awareness levels, with 49% of 18-30 years olds being informed about these commitments compared to 20% of those above 60 years. Social media platforms, especially online media (42%), Instagram, and YouTube (40%), served as significant sources of information. Traditional media such as print (24%), TV, and radio (29%) also played a role, alongside word of mouth (31%) and company websites (28%).

LIKELIHOOD OF SHARING INFORMATION:

Over half of the respondents (51%) expressed a high likelihood of sharing information about a company's AQI reduction actions or commitments with friends and family. Notably, all respondents above the age of 50 years reported willingness to share such information.

TRUST IN COMPANIES' CLAIMS AND COMMITMENTS:

Only 31% of respondents expressed complete trust in companies' claims and commitments regarding their transition to EVs, while 45% stated that they somewhat trusted these claims. Concerns were raised regarding the accuracy of companies' claims, particularly regarding recycling and other sustainability practices. Real-time progress on the ground, active communication with consumers, and data transparency were identified as key actions that would increase consumer trust in a company's EV transition plans.

5. KEY FINDINGS:

IMPACT ON PURCHASING DECISIONS:

IMPORTANCE OF COMPANY COMMITMENT TO AIR POLLUTION REDUCTION IN CONSUMER PURCHASING DECISIONS:

A company's dedication to reducing air pollution was a factor influencing their purchasing decisions for 97% of respondents (very important for 56% and somewhat

important for 41%). Younger respondents exhibited a higher tendency to value a company's commitment to air pollution reduction.

IMPORTANCE OF COMPANY COMMITMENT TO CLIMATE ACTION IN CONSUMER PURCHASING DECISIONS:

A majority of respondents (58%) stated they have chosen products or services based on a company's commitment to strong climate action and emission reduction, particularly in cities like Pune/Pimpri-Chinchwad, Ahmedabad, and Bangalore. Older respondents were more likely to prioritise products based on climate action commitment. Respondents cited factors such as renewable energy usage, environmental responsibility commitment, and energy-efficient production methods as significant influences on their purchasing decisions. These factors varied across cities, with respondents from Hubli-Dharwad, Kolkata, and Delhi showing higher sensitivity to such initiatives.

LIKELIHOOD OF SUPPORTING AND PURCHASING FROM COMPANIES TRANSITIONING TO ELECTRIC VEHICLES (EVS):

80% of respondents said they would purchase from companies actively transitioning to EVs (39% very likely to do so and 41% likely to). Age-wise analysis showed higher inclination among older age groups towards purchasing from such companies.

CONSUMER PREFERENCES FOR SUPPORTING SUSTAINABLE SOURCING PRACTICES:

67% of respondents expressed a strong inclination towards companies engaging in sustainable sourcing of technology. Pune/Pimpri Chinchwad, Kolkata, and Hubli-Dharwad emerged as strongholds for sustainable consumer behaviour.

6. KEY FINDINGS:

CONSUMER PREFERENCES ON MOST IMPACTFUL ENVIRONMENTAL INITIATIVES ESPECIALLY ON EV TRANSITION:

MOST IMPACTFUL ENVIRONMENTAL INITIATIVES:

Eco-friendly production methods was the most widely recognised environmental initiative by companies (70%), closely followed by public commitments to environmental responsibility (53%), adoption of sustainable and renewable resources, and the implementation of green technologies in operations (47% each). Transparent reporting on environmental impact was considered the least impactful initiative.

ADHERENCE TO REGULATORY/POLICY TRANSITION TIMELINES:

98% of respondents considered adherence to policy-mandated transition timelines important (65% very important and 33% somewhat important). Cities like Pune/Pimpri Chinchwad, Asansol, and Delhi exhibited the highest proportion of respondents prioritising timely transition.

SUPPORT MECHANISMS FOR JUST LABOUR TRANSITION:

63% of respondents acknowledged the potential impact of EV transition on drivers/ partners, particularly highlighted in cities like Pune/Pimpri-Chinchwad and Hubli-Dharwad. 66% said they would prefer to shop from companies that actively support workers in a just transition to EVs.

MECHANISMS FOR ENSURING SUSTAINABLE SUPPLY CHAIN/ SOURCING:

60% of respondents emphasised the importance of companies prioritising sustainably sourced materials during the EV transition process. Pune/Pimpri-Chinchwad and Asansol exhibited significant support for sustainable practices, indicating a shifting consumer preference towards environmentally conscious supply chain practices.

ADDITIONAL EV TRANSITION FACTORS INFLUENCING CONSUMER PERCEPTION:

Investment in EV charging infrastructure and the use of renewable energy sources in operations emerged as the primary factors influencing consumer perception of companies transitioning to EVs.

7. KEY FINDINGS:

WILLINGNESS TO SWITCH BRANDS BASED ON COMMITMENTS & ACTIONS BY COMPANIES:

CONSUMER WILLINGNESS TO SWITCH BRANDS BASED ON AIR POLLUTION REDUCTION COMMITMENTS:

63% of respondents were willing to switch from their current brands to competitors with stronger commitments to reducing air pollution. The highest proportion of respondents willing to switch were observed in Pune (86%) and Bangalore (81%), while Ahmedabad (27%) and Kolkata (21%) had lower percentages.

Focus group discussions highlighted that consumers value product quality, pricing, and other factors when making purchasing decisions. Participants emphasised the need for companies to effectively demonstrate the benefits of their products to both consumer health and the environment.

CONSIDERATIONS FOR SWITCHING BRANDS BASED ON EMISSIONS REDUCTION COMMITMENTS:

74% of respondents were willing to switch to a brand with a stronger commitment to emission reduction, with an additional 14% considering this possibility.

Geographically, respondents from Pune/Pimpri Chinchwad (85%) and Bangalore (80%) showed the highest willingness to switch brands. Older age groups, particularly those aged 50 years and above, displayed a greater willingness to switch brands.

WILLINGNESS TO SWITCH BRANDS BASED ON ADHERENCE TO STATE MANDATED TRANSITION REGULATIONS AND POLICIES:

66% of respondents were willing to switch to competitor brands complying with mandated transition timelines. Pune/Pimpri Chinchwad, Hubli/Dharwad, and Bangalore showed the highest inclination towards switching brands.

8. KEY FINDINGS:

RECOMMENDING BRANDS BASED ON CLIMATE ACTIONS & COMMITMENTS:

LIKELIHOOD OF RECOMMENDING BRAND BASED ON AIR QUALITY REDUCTION COMMITMENTS & INITIATIVES:

52% of respondents expressed a high likelihood of recommending brands based on their air quality improvement initiatives. Pune (72%) and Hubli/Dharwad (66%) had the highest proportion of such respondents.

LIKELIHOOD OF RECOMMENDING BRANDS BASED ON EMISSIONS REDUCTION COMMITMENTS:

More than 50% of the respondents expressed a strong likelihood of recommending brands based on their emission reduction initiatives.

LIKELIHOOD OF RECOMMENDING COMPANIES TRANSITIONING TO EVS:

69% of respondents expressed a strong inclination to recommend companies transitioning to EVs to their friends or family. Older respondents were more likely to recommend such companies compared to younger age groups.

9. CONCLUSION

The findings of the survey point to growing awareness and concern among consumers regarding environmental issues such as air pollution and climate change. Despite varying levels of awareness across cities, there was a widespread recognition of the detrimental effects of air pollution on health and the environment. Consumers are increasingly looking towards companies to take responsibility and implement measures to address these concerns, with a significant emphasis on transparency and effective communication.

Moreover, the research highlighted a clear consumer preference of supporting companies that demonstrate a commitment to environmental sustainability, whether through reducing air pollution, emissions, or transitioning to electric vehicles. Factors such as product quality, urgency, pricing, and sustainability initiatives influence purchasing decisions, indicating a growing demand for eco-friendly products and services

SECTION 1

INTRODUCTION

1.1 BACKGROUND

The “last-mile delivery sector” refers to the final step of the delivery process where goods are transported from a transportation hub to the final delivery destination. This sector is a critical component of the modern economy, serving as the final link between businesses and consumers in various industries, including e-commerce, food delivery, hyperlocal grocery delivery, and logistics.

The last-mile delivery sector in India faces several challenges, such as traffic congestion, limited delivery time windows, parcel theft and security, address accuracy and access, handling fragile and perishable goods, lack of technological integration, need for improved infrastructure, and meeting increased customer expectations. These challenges highlight the need for innovation and strategic planning in the last-mile delivery sector to enhance its efficiency and customer satisfaction.

One of the many ways through which companies can address the challenges faced by the last-mile delivery sector in India is use of Electric Vehicles for deliveries, which can help in reducing environmental impacts and operating costs (Akshat, Pushp, 2023, et-edge.com). In recent years, there has been a growing emphasis on sustainability and environmental responsibility, leading many companies to consider transitioning their last mile delivery fleets to electric vehicles.

The Indian last-mile delivery market is expected to reach a value of $6-7 billion by 2024, driven by the FMCG, e-commerce, and retail segments. The adoption of technology and the shift towards EVs are key factors contributing to this growth. This sector is a part of the broader logistics industry, which plays a vital role in supporting various industries and has been enhancing its technology-based offerings to meet the diverse needs of different sectors. The last-mile delivery segment is particularly important as it directly affects customer satisfaction and loyalty (Rana, Karvi, Indian Last Mile Delivery Market to reach $6-7 billion by 2024: RedSeer Report, logistics insider.in).

The adoption of Electric Vehicles can offer lower fuel costs compared to traditional vehicles, leading to substantial savings. As EVs have fewer moving parts, they lower maintenance costs and reduce down time. Companies can benefit from various government subsidies and tax benefits. EVs are much more eco- friendly than traditional vehicles as they reduce carbon emissions. They also offer efficiency in city driving. Adoption of EVs can enhance brand image as environmentally responsible entities, thereby attracting customers and improving loyalty. Use of EVs help companies to comply with regulations as India is adopting stricter emission norms. Overall, the shift towards EVs in the last-mile delivery sector can lead to long-term cost savings, improved operational efficiency, and a better environmental footprint.

However, the adoption of Electric Vehicles in India faces several challenges such as high initial cost, lack of charging infrastructure (though improving), service and repair concerns, anxiety about driving range of EVs and availability of charging points between trips and uneven electricity distribution across regions. Also, the time it takes to charge EVs is always a concern. Moreover, there is a lack of awareness among the general public about the benefits and capabilities of EVs.

Addressing these challenges requires concerted efforts from the government, industry, and consumers to create a conducive environment for EV adoption. The government push on sustainable mobility, improvements in infrastructure and increasing customer demand are holding promises for transition to EVs in general and the last mile delivery sector in particular. **FAME II (Faster Adoption and Manufacturing of Electric Vehicles in India Phase II)** scheme, aimed at reducing dependency on fossil fuels and combat air pollution, is proof of commitment to the EV sector, provides financial incentives through a budget outlay of Rs 10,000 crores over a period of 3 years from 2019. About 86% of the total budget is allocated for demand incentives to create a market for EVs. The scheme aims to support the adoption of 7000 e-Buses, 5 lakh e-3 Wheelers, 55000 e-4 Wheeler Passenger Cars (including Strong Hybrid), and 10 lakh e-2 Wheelers by incentivizing advanced battery and registered vehicles. The **Shoonya Campaign** is another initiative by NITI Aayog in collaboration with the Rocky Mountain Institute (RMI) to promote zero-pollution mobility by accelerating the adoption of electric vehicles for ride-hailing and delivery services in India.

1.2 OBJECTIVES OF THE RESEARCH

A consumer driven research was conducted among 3800 respondents spread over 10 cities which included Delhi, Mumbai & Pune (Maharashtra), Asansol & Kolkata (West Bengal), Coimbatore and Chennai (Tamil Nadu) and Ahmedabad (Gujarat). The research aimed to gauge consumer perceptions and insights into providing effective communication around EV transition commitments by e-commerce, logistics providers and other companies operating in the last mile delivery space, establishing a clear pathway for sustainability reporting on the last mile transition for the industry.

The survey specifically aimed to gather insights into:

1. Awareness and understanding of air pollution, its effects, and the relevance of the Air Quality Index (AQI)
2. Perception of corporate responsibility towards reducing air pollution and emission, including awareness of companies' initiatives and communication effectiveness.
3. Influence of environmental initiatives on purchasing decisions and brand loyalty.
4. Perception and trust towards companies' commitments to transitioning to electric vehicles, including factors influencing trust and support mechanisms.
5. Adherence to regulatory/policy transition requirements for EV adoption and support mechanisms for ensuring just labour transition.
6. Importance of sustainable sourcing in the EV transition process and its influence on consumer behaviour.

The research findings were expected to have the following use:

ESTABLISHING CONSUMER DRIVEN PROGRESS INDICATORS:

By identifying key consumer perception trends and progress indicators through the consumer survey, the research provides progressive companies with key insights and consumer sourced indicators on overall reporting by companies on their EV transition

pathway. This would also serve as a future reference point for industry wide reporting by companies of their sustainability and EV transition efforts.

EFFECTIVE COMMUNICATION:

Progressive companies of the Shoonya campaign can use their benchmark scores to effectively communicate their commitment to sustainability and their transition to EVs to stakeholders, including customers, investors, and the general public.

ENCOURAGING ACTION:

Companies will be encouraged to take more substantial actions to improve their scores and align with industry best practices in sustainability and EV adoption.

1.3 METHODOLOGY

The survey employed a mixed-method approach to gather data, combining quantitative and qualitative methods. Quantitatively, 3800 respondents were targeted, with 380 individuals sampled from each city, ensuring a robust representation at a 95% confidence level with a 5% margin of error. However, due to a few non-responses or incomplete responses, the actual dataset used for the report comprised 3755 respondents. These respondents were consumers of companies engaged in last-mile delivery services. Respondents were selected through random sampling, with stratification based on various demographic factors including socioeconomic status, education level, gender, age group, and occupational category.

In the qualitative component, four FGDs were conducted in distinct locations, each representing a different region - North, South, East, and West. The selection of cities for the FGDs aimed at geographical diversity, covering both Tier 1 and Tier 2 cities. Specifically, the FGDs were conducted in Delhi (representing the North, a Tier 1 city), Coimbatore, Tamil Nadu (representing the South, a Tier 2 city), Asansol, West Bengal (representing the East, a Tier 2 city), and Ahmedabad, Gujarat (representing the West, a Tier 1 city). This selection strategy ensured both geographic representation and a mix of urbanization levels, with two Tier 1 cities and two Tier 2 cities included in the sample. A total of 80 participants were included in four FGDs, with 20 participants in each FGD. Each FGD had a diverse representation in terms of gender and various age groups.

Table 1: Sample Achieved

State	City	Sample (Quantitative)	Sample (Qualitative)
Delhi	Delhi	380	1 (20 participants)
Gujrat	Ahmedabad	370	1 (20 participants)
Karnataka	Bangalore	372	
	Hubli-Dharwad	374	
Maharashtra	Mumbai	380	
	Pune	380	
Tamil Nadu	Coimbatore	380	1 (20 participants)
	Chennai	372	
West Bengal	Asansol	373	1 (20 participants)
	Kolkata	371	
Total		**3752**	**4 (80 participants)**

Overall, the study covered a total of 3,835 respondents, combining both quantitative and qualitative data.

1.4 DATA COLLECTION PROCEDURES, INCLUDING ETHICAL CONSIDERATIONS

CMSR Consultants hired and trained research assistants to conduct quantitative data collection, using the CAPI method. A total of five RAs and one field coordinator were engaged in each city to complete the data collection within the stipulated time period. Additional oversight was provided by the core study team members. The

study team at CMSR Consultants was also involved in conducting qualitative data collection with support from local moderators. The research team underwent comprehensive training on the study tools and ethical considerations associated with conducting research involving human subjects.

Participants were provided clear information about the survey's purpose and gave voluntary consent before participation. Verbal consent was obtained in the local languages, covering aspects such as purpose of the study, voluntary participation and rights of the study participants, consent for audio recording and note-taking (in case of FGDs), confidentiality, data protection measures, results of the research, rights to ask questions and contact information. Data confidentiality and anonymity were assured to promote candid responses.

1.5 DATA QUALITY AND MANAGEMENT

All primary data collection was done and supported by research assistants conversant in the local language and with experience in conducting qualitative interviews. CMSR consultants ensured data quality at various levels.
Quality assurance mechanisms implemented during this project included:

- The training session for research assistants familiarized them with the data collection schedule and appropriate interviewing techniques for quality data. Mock testing with role-plays was an important component of the training plan to maintain data reliability.

- Routine data reviews and regular investigator discussions ensured high quality of interview, and appropriate questioning and delivery were maintained to ensure data quality. Additionally, the core research team either conducted or supported research investigators throughout the data collection phase.

- Each qualitative data gathered was transcribed and further translated into the English language for analytical purposes.

- All documents were stored in password protected computers with access to only the study team. Post uploading, the audio records from the recording device were deleted.

1.6 DATA ANALYSIS

When the field work was underway, the core team finalized the analysis plan and worked on the structure of the report. Transcriptions of the FGDs and content analysis were done parallel to the field survey. Following the survey, data collation was automated using eRaay software. Subsequently, the data underwent cleaning and validation for responses within STATA, and a final database was prepared for analysis and table generation. The report's findings are derived from this analyzed data, augmented by key insights from FGDs across the four locations.

Data analysis was conducted by survey locations, with relevant cross-tabulations performed by gender and age-group. In the main report, tables and graphs presenting the overall data are included, while location-specific tables are relegated to the annexure section. This decision was made to enhance document readability and report compactness. However, for clarity, the analysis and interpretation sections directly reference the annexure tables, with page numbers provided for ease of navigation and understanding.

SECTION 2

DEMOGRAPHIC PROFILE

2.1 GENDER

The overall gender breakdown indicated a slight majority of male respondents (52%) compared to female respondents (48%). Bangalore exhibited the highest proportion of male respondents (60%), whereas Delhi had the highest representation of female respondents (57%) (Annex Table 1, Pg. 109). A marginal gender participation gap arose due to two primary factors: the survey did not prioritize achieving equal male-female representation, as it targeted randomly selected individuals, and a higher rate of refusal for participating in the survey was observed among female respondents.

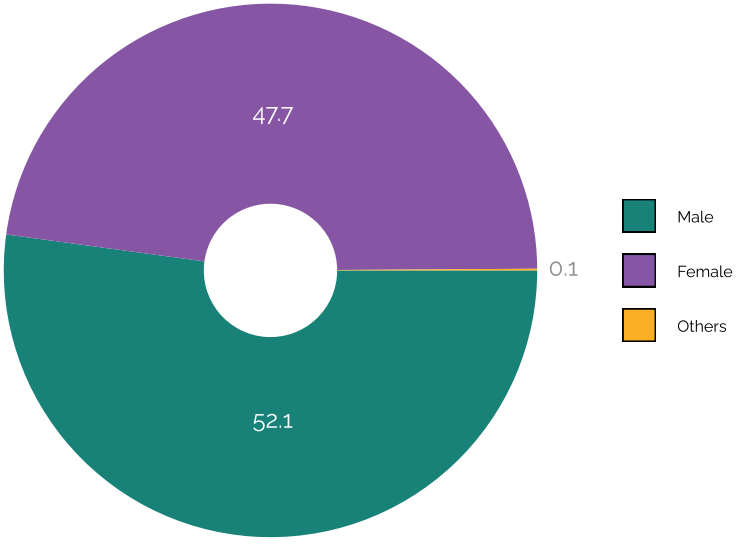


Fig 1: Percentage distribution of respondents by gender (n=3752)

2.2 AGE GROUP

The survey covered a diverse range of age groups. However, majority of respondents were aged 18-30 years, constituting 53% of the total sample. Notably, this demographic was especially prominent in Coimbatore (86%), Chennai (81%), Bangalore and Delhi (57% each). Approximately one-fourth of the respondents fell

within the 31-40 age group, while 15% were in the 41-50 age bracket (Annex Table 2, Pg. 109).

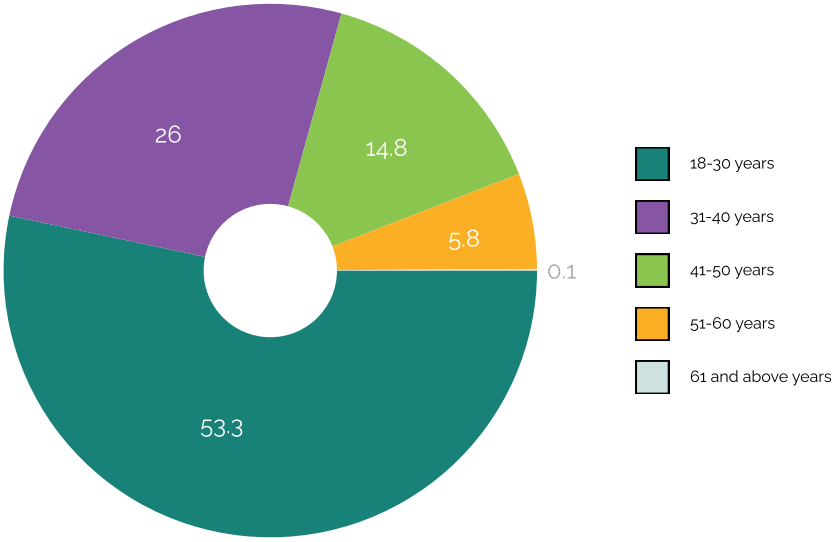


Fig 2: Percentage distribution of respondents by age-group (n=3752)

2.3 EDUCATIONAL STATUS

Across most cities, the majority of respondents had at least a Bachelor's degree, with highest percentage of graduates in Bangalore (71%) and Pune (63%). Nearly 16% and 7% of the sample were educated up to the Intermediate level and below high school respectively (Annex Table 3, Pg. 110).

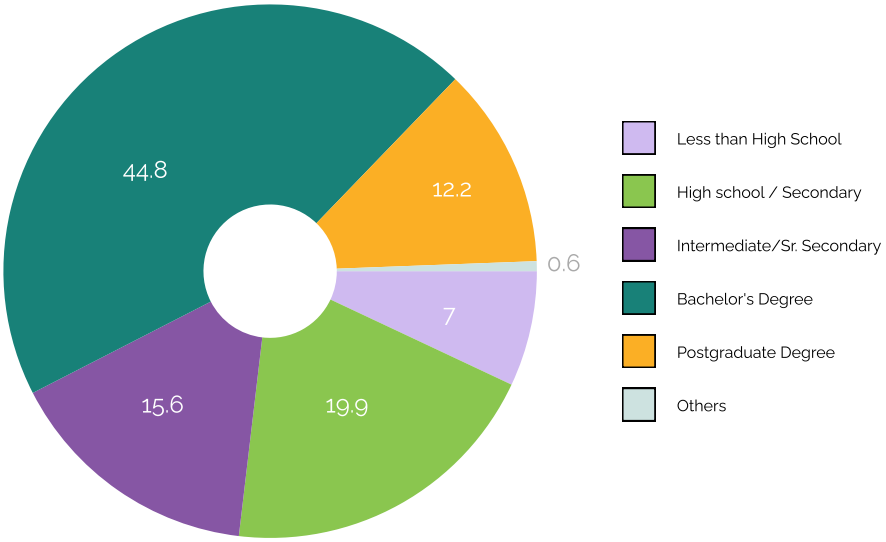


Fig 3: Percentage distribution of respondents by educational status (n=3752)

2.4 OCCUPATIONAL STATUS

Approximately 35% of the respondents were working professionals, highest in Bangalore (70%) followed by Delhi (43%) and Mumbai & Pune (40% each). Those who were self-employed constituted 24% of the sample and 20% were students. Homemakers comprised 19% of the surveyed population. The highest representation of self-employed people was from Dharwad and Ahmedabad, accounting for 50% and 48% of the sample respectively (Annex Table 4, Pg. 111).

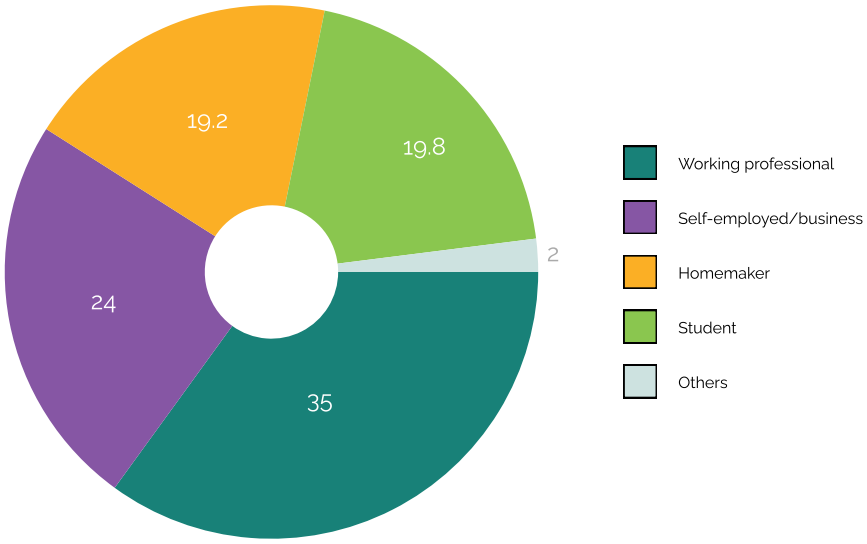


Fig 4: Percentage distribution of respondents by occupational status (n=3752)

2.5 DELIVERY SERVICE PROVIDERS ACROSS CITIES

Among delivery service providers, Amazon emerged as the dominant player, with 74% of respondents using its services. A city-wise analysis revealed that the highest proportion of Amazon users were from Pune/Pimpri-Chinchwad (89%), Mumbai (82%), and Kolkata (82%).

Following closely behind was Flipkart, the second most popular delivery service provider, with a usage rate of 68%, particularly prevalent in Kolkata (88%), Pune/ Pimpri-Chinchwad (71%), and Mumbai (71%). Slightly more than half of the surveyed respondents were availing the food delivery platforms, with Zomato leading at 52%,

followed by Swiggy at 32%. Zomato held a strong presence in cities like Delhi (55%), Mumbai (45%), and Kolkata (52%), while Swiggy was also used by respondents from Bangalore (44%) and Delhi (42%). Overall, less than 7% respondents stated using parcel delivery services (Annex Table 5, Pg. 111).

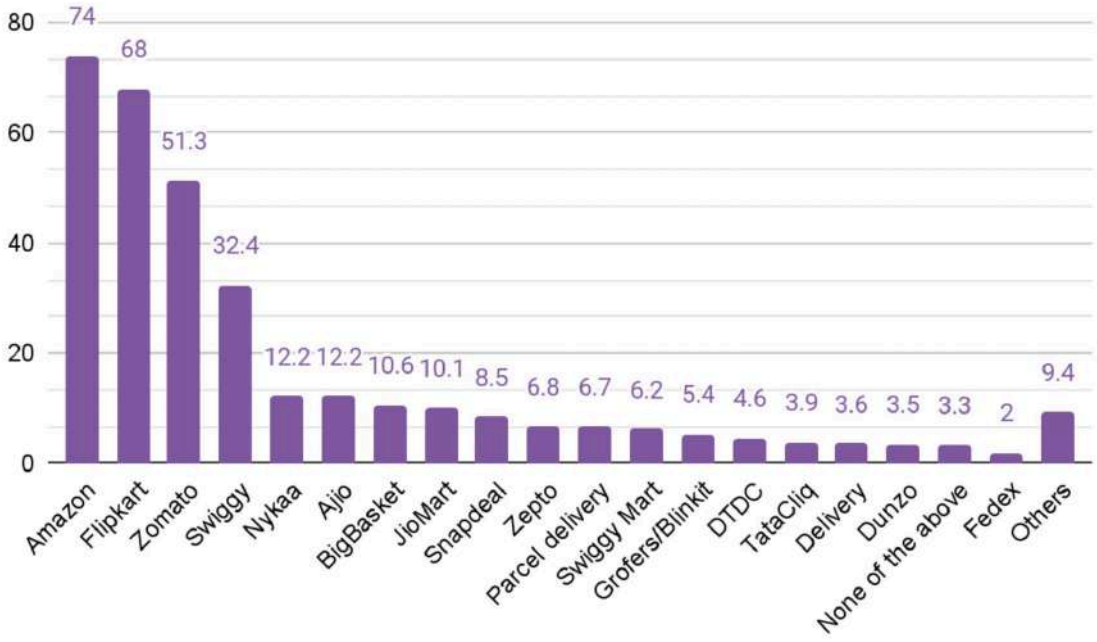


Fig 5: Percentage distribution of respondents by delivery service providers makes utilized for deliveries to their address (n=3752) **Multiple Responses

SECTION 3

AIR POLLUTION AWARENESS AND CORPORATE RESPONSIBILITY: CONSUMER PERCEPTIONS AND BEHAVIOR

3.1 AWARENESS AND UNDERSTANDING ABOUT AIR POLLUTION, AQI & ITS IMPACT ON HUMAN HEALTH AND ENVIRONMENT

3.1.1 LEVEL OF AWARENESS ABOUT AIR POLLUTION

Overall, a substantial number of respondents across various cities (75%) displayed either a high or moderate level of awareness regarding air pollution. The cities with the highest proportions of respondents exhibiting a high degree of awareness about air pollution were Pune/Pimpri-Chinchwad (73%), Chennai (49%), and Bangalore (46%). On the other hand, cities like Hubli/Dharwad (25%) and Mumbai (26%) exhibited lowest awareness levels (Annex Table 6, Pg. 112).

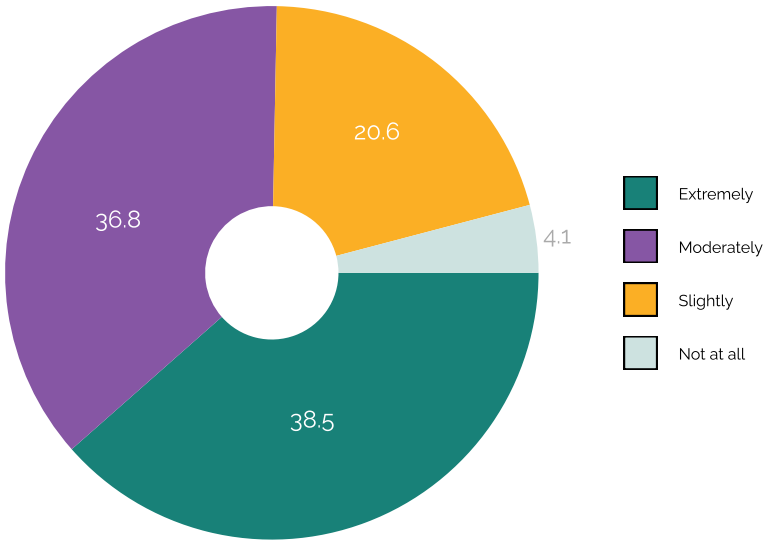


Fig 6: Percentage distribution by awareness about air pollution in their city (n=3752)

3.1.2 RESPONDENTS' PERCEPTION ON AIR QUALITY IN THEIR LOCALITY

The survey also sought to gauge public perception regarding the air quality in their localities concerning human health and the environment. The data revealed a consistent trend of concern regarding air quality across the surveyed localities, with an overall majority of respondents, at 56% expressing dissatisfaction.

Across the sample cities, the highest levels of concern were expressed by respondents in Delhi and Asansol, with 86% and 84% respectively indicating dissatisfaction with the air quality. This sentiment was echoed to a slightly lesser extent by respondents in Kolkata, where 77% shared similar concerns. In contrast, a notable majority of respondents from Hubli-Dharwad, at 87%, reported no issues with the air quality in their locality.

Cities like Mumbai, Chennai, Bangalore, and Pune/Pimpri-Chinchwad exhibited a more mixed perception, with slightly over half of the respondents in each of these cities expressing dissatisfaction with the air quality. Interestingly, the respondents from Hubli-Dharwad stand out as having a notably different perception, with 87% expressing satisfaction with the air quality in their locality (Annex Table 7, Pg. 113).

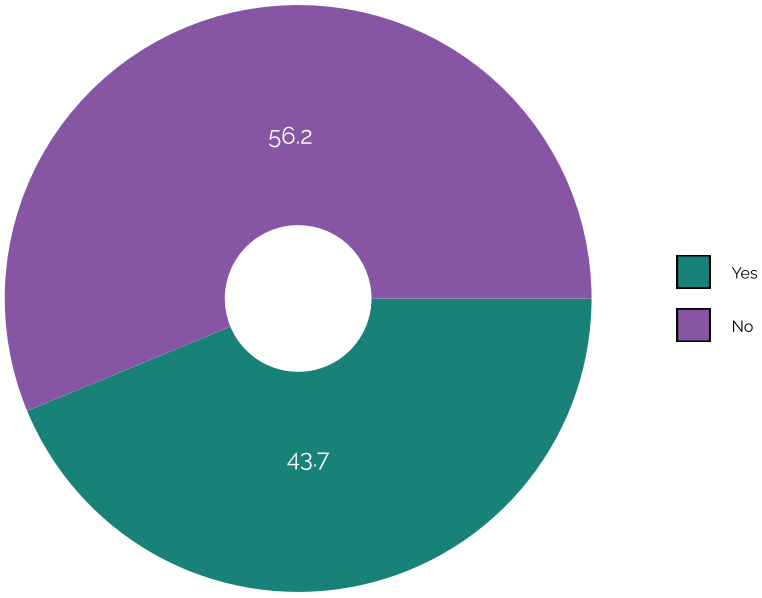


Fig 7: Distribution of respondents based on their perception of the air quality in their locality regarding its suitability for human health and environmental well-being (n=3752)

During the focus groups in Coimbatore, participants pointed out that air pollution and climate change are closely related. According to the majority of the participants, the major cause of air pollution is the increase in the number of vehicles on the roads.

> *"Climate change is primarily driven by several factors, including deforestation, urbanization, greenhouse gas emissions, and rapid industrialization. These activities have profound impacts contributing to global warming and other environmental changes".*

Respondents who indicated that the air quality in their areas was unfavourable for both human health and the environment were further questioned about whether they believed that air pollution in their cities was increasing, decreasing, or remained the same.

Overall, 84% of respondents expressed the view that air pollution in their cities was on the rise. The highest percentages of respondents stating that air pollution was increasing were from Bangalore (97%) and Pune/Pimpri-Chinchwad (97%), followed by Asansol (96%), Kolkata (90%), and Chennai (83%). Similarly, a significant portion of respondents from Delhi (77%) and Mumbai (74%) also felt that the air quality in their cities was deteriorating (Annex Table 8, Pg. 114).

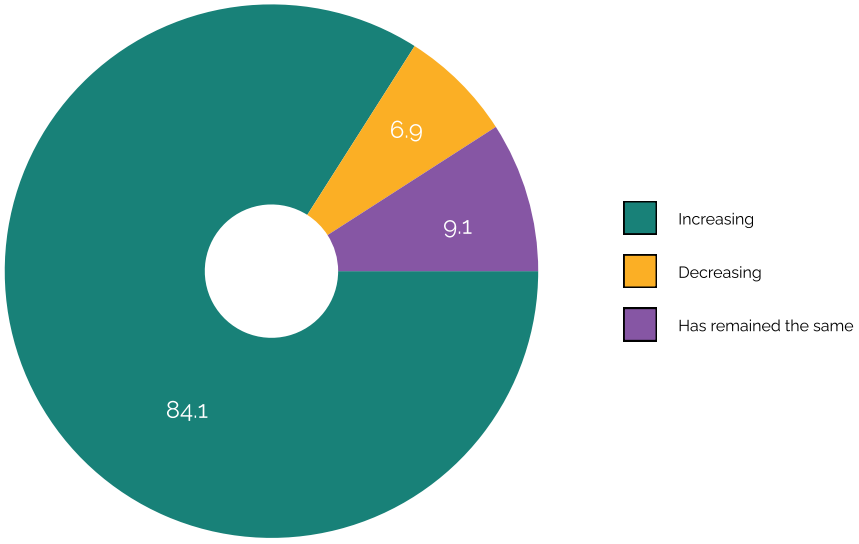


Fig 8: Respondents' perception of pollution trends in their city: Increasing, Decreasing, or Unchanged (n=2110)

At the aggregate level, a significant portion of respondents, approximately 96%, expressed some level of concern about rising air pollution in their cities. Specifically, 55% of respondents indicated being very concerned, while 41% mentioned being somewhat concerned. When examining the data at the city level, some cities stand out for their particularly high levels of concern. Pune/Pimpri-Chinchwad emerged as the city with the highest level of concern, with a staggering 73% of respondents expressing being very concerned about escalating air pollution. This was followed by Bangalore (65%), Asansol (62%), and Ahmedabad (59%). On the other hand, some cities demonstrated lower levels of concern relative to the aggregate. Hubli-Dharwad, for instance, exhibited the lowest level of concern among the sampled cities, with only 23% of respondents expressing being very concerned about air pollution (Annex Table 9, Pg. 114).

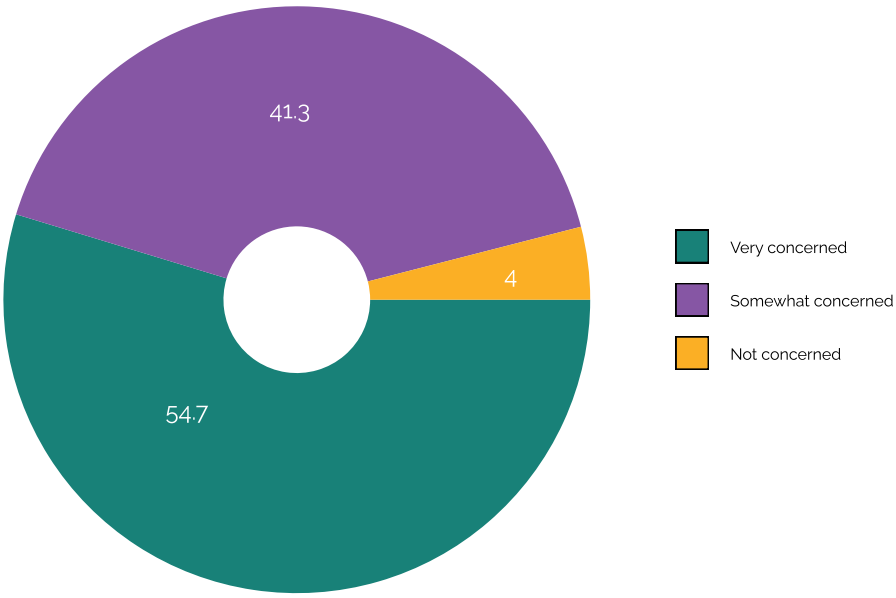


Fig 9: Percentage distribution of respondents indicating their level of concern due to rise/falls in air pollution in their respective cities (n=2110)

3.1.3 RESPONDENTS' FAMILIARITY WITH THE CONCEPT OF AQI

Overall, only 40% of respondents demonstrated both awareness of the AQI and a clear understanding of its significance. Another 43% were aware of the AQI but lacked comprehension of its relevance. Nearly 17% of respondents were neither aware of nor understood the importance of the AQI. Pune/Pimpri-Chinchwad exhibited the highest proportion of respondents with both awareness and understanding of the AQI,

standing at 73%. Chennai followed closely at 53%, while 44%, 42%, and 41% of the respondents of Delhi, Coimbatore, and Ahmedabad respectively had both awareness and understanding of the AQI (Annex Table 10, Pg. 115).

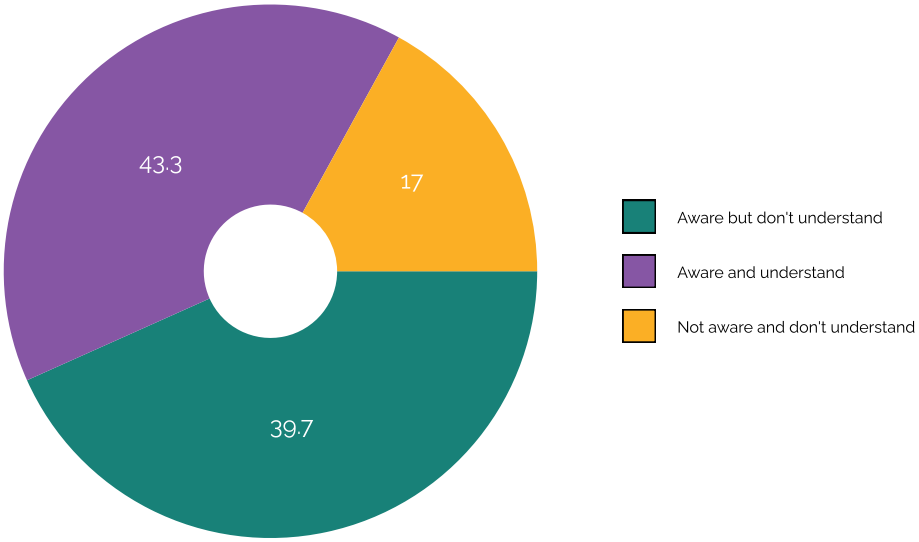


Fig 10: Percentage distribution of respondents by their awareness and understanding of the AQI relevance (n=3752)

Further analysis revealed that there is a significant lack of awareness among respondents regarding the current AQI levels in their respective cities. Overall, 53% of respondents across cities were unaware of the current AQI level. Notably, the highest percentage of respondents lacking knowledge about the AQI levels were from Asansol (95%). Delhi, despite being one of the most polluted cities, had only 50% of respondents claiming awareness of the AQI levels. Mumbai and Kolkata had even lower awareness levels, with only 36% and 17% of respondents respectively claiming awareness. In contrast, cities like Pune/Pimpri-Chinchwad and Ahmedabad demonstrated higher awareness levels, with 76% and 72% of respondents respectively claiming awareness of the AQI levels (Annex Table 11, Pg. 116).

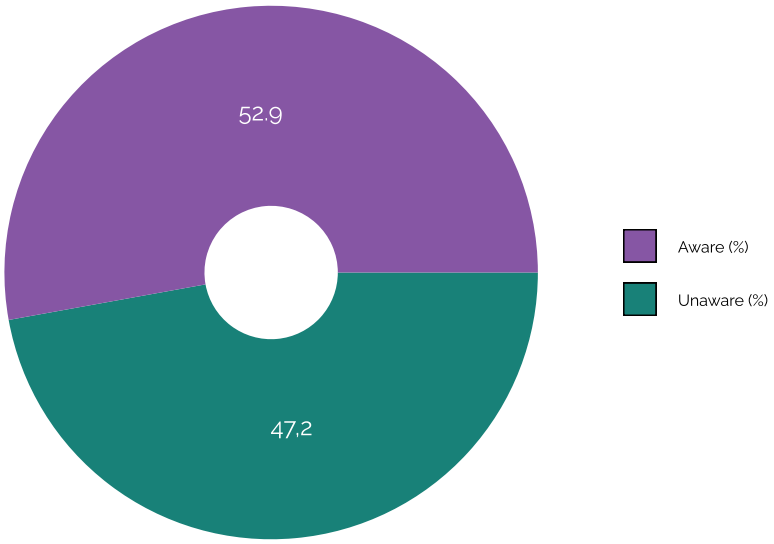


Fig 11: Distribution of respondents' awareness of the current AQI level in their respective areas (n=3752)

3.1.4 EFFECTS OF AIR POLLUTION

Respondents reported various adverse effects of air pollution on their health and daily lives. These effects included irritation to the eyes, nose, and throat (52%), skin issues (53%), breathlessness (47%), respiratory ailments like asthma (32%), and concerns about the health of children (32%). Additionally, respondents also highlighted the economic impact of air pollution, including increased medical expenses, loss of productivity, and travel disruptions.

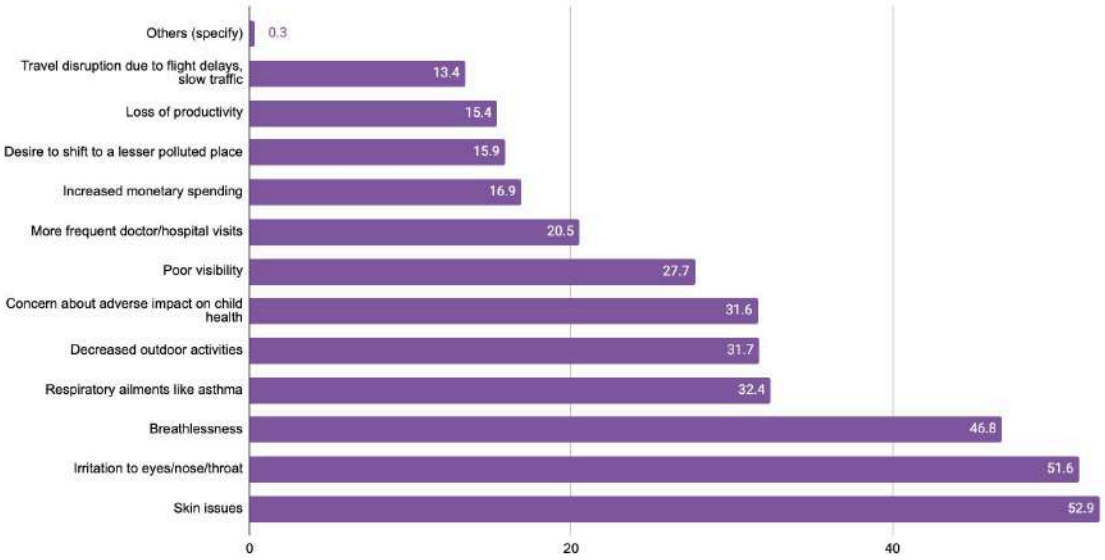


Fig 12: Percentage distribution of respondents reporting the effects of air pollution(n=3752)
** Multiple Responses

The primary measures adopted to address the adverse effects of air pollution was the use of masks, constituting 66% of the responses. Notably, Delhi, Bangalore and Pune recorded the highest adherence to this practice at 87% and 82% respectively, while Kolkata reported the lowest usage rate at 38%. Following mask usage, the next prevalent measure taken was restricting outdoor activities during poor air quality days. Pune/Pimpri-Chinchwad and Mumbai exhibited the highest rates at 46% and 41%, respectively while Kolkata displayed the lowest rates at 16%. Around 34% chose to reduce their driving or use alternative transportation options, with the highest percentage seen in Delhi and Pune. Lastly, nearly a quarter of respondents (26%) reported using air purifiers as a measure to mitigate the impact of air pollution (Annex Table 13, Pg. 118).

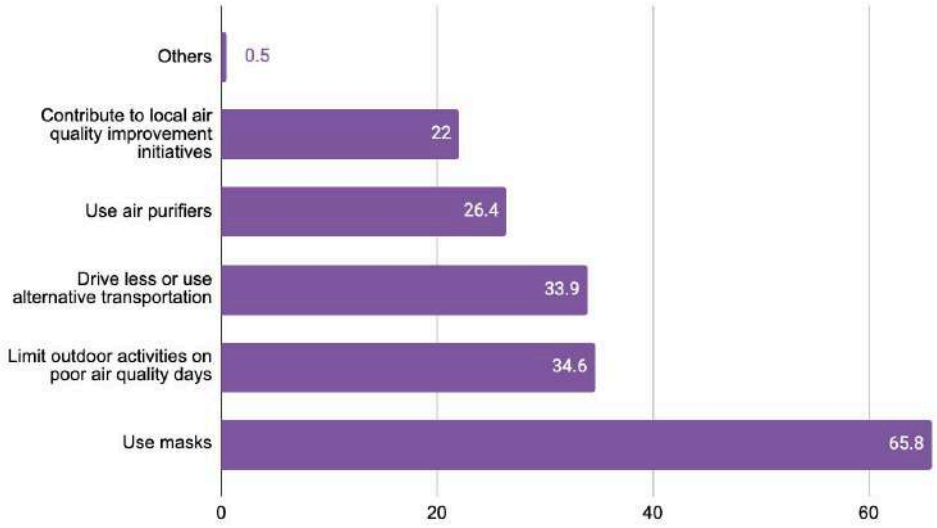


Fig 13: Percentage distribution of respondents based on actions taken to mitigate exposure to poor air quality (n=3752) ** Multiple Responses

3.2 INFORMATION SOURCES ON COMPANY/ PRODUCT

3.2.1 FAMILIARITY WITH THE CONCEPT OF CORPORATE/BUSINESS RESPONSIBILITY FOR REDUCING AIR POLLUTION

Approximately 38% demonstrated a high level of familiarity with the concept of corporate/business responsibility for reducing air pollution and improving AQI.

However, a significant number (48%) indicated only a moderate level of familiarity, while 14% were not at all familiar with the concept (Annex Table 14, Pg. 119).

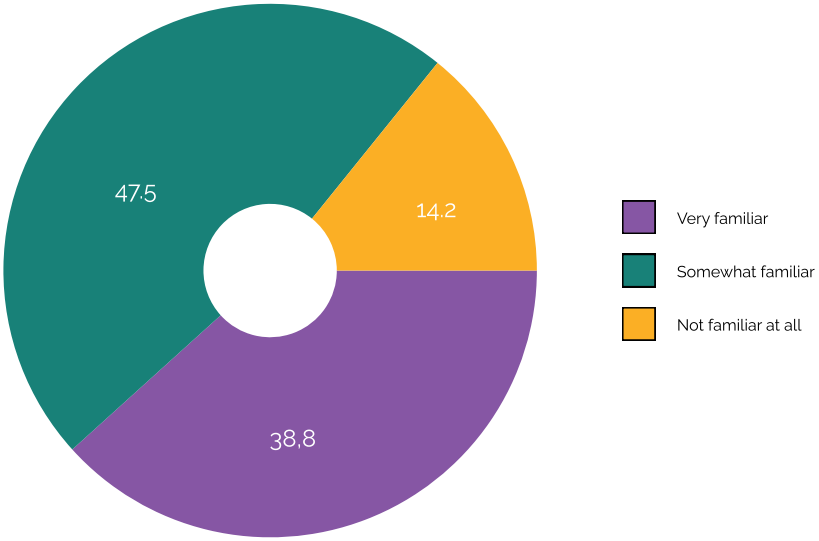


Fig 14: Percentage distribution of respondents by their familiarity with the concept of corporate/ business responsibility for reducing air pollution and improving air quality (n=3752)

Gender-wise analysis indicated that a higher proportion of males (40%) compared to females (37%) stated familiarity with the concept of corporate/business responsibility for reducing air pollution and improving Air Quality Index (AQI).
Similarly, analysis by age groups revealed that respondents in the 18-30 years age group (40%) were very familiar with the concept of CBR, followed closely by the 41-50 age group respondents (38%). Approximately 36% and 35% of respondents belonging to the age groups of 51-60 years and 31-40 years, respectively, reported being very familiar with the concept.

Table 2: Familiarity with the concept of corporate/business responsibility for reducing air pollution and improving air quality by gender and age-group

Characteristics	Very familiar	Somewhat familiar	Not familiar at all
Gender			
Male	**39.9**	**48.2**	**11.9**

Female	**36.5**	**46.8**	**16.7**
Age Group			
18-30 years	**40.1**	**46.8**	**13.1**
31-40 years	**35.2**	**51.4**	**13.4**
41-50 years	**38.1**	**45.5**	**16.4**
51 years and above	**36.4**	**41.5**	**22.1**

The focus groups with participants revealed that several of them were aware of the concept of corporate/business responsibility for reducing air pollution and improving AQI. For instance, participants from Coimbatore mentioned that they had knowledge of the initiatives taken by a few cracker companies in Sivakasi by way of introducing "green crackers" as a measure to reduce pollution. These green crackers are designed to emit lower levels of pollutants compared to traditional firecrackers. Few of them also talked about a few cosmetic companies that encourage their customers to return purchased containers for a special discount to promote reusability and sustainability in the cosmetics industry.

During interactions with participants from Asansol, they stated that they have seen even small businesses taking proactive steps to reduce the environmental impact and raise awareness among their customers.

> *"I recently came across an Instagram business that included a detailed message inside the packaging, printed on paper inserts, explaining their sustainability efforts. Despite being smaller in scale compared to giants like Flipkart, these businesses are making meaningful contributions and go the extra mile by including pamphlets that outline their environmental initiatives, along with helpful tips and guidelines"*
>
> *- 25 year old Woman School Teacher, Asansol*

Asansol participants spoke about brands like Maaza and Frooti transitioning from using plastic straws to paper ones. To reduce plastic waste and promote eco-friendly alternatives. FGD participants from Delhi stated that few companies are now using recycling symbols on plastic bottles and opting for paper wraps over plastic and that some companies retrieve grocery bags upon delivery.

According to participants from Ahmedabad, *"there is a noticeable trend towards accepting battery-powered solutions across various companies and industries. Lithium-based batteries, in particular, are gaining prominence, especially in sectors like courier companies and last-mile delivery services, where battery-operated vehicles are becoming increasingly common".*

3.2.2 FINDING OUT ABOUT A COMPANY'S INITIATIVES FOR AIR POLLUTION (AQI) REDUCTION

Social media emerged as the primary source of information for consumers regarding companies' initiatives for AQI reduction, with 69% of respondents stating so. The highest proportion who stated getting information on the company's initiatives through social media were from Delhi (78%) and Kolkata (77%). Around 43% and 41% respondents resorted to news articles and word of mouth respectively to learn about initiatives undertaken by companies to reduce AQI. Other sources such as product labels/packaging, company websites, and annual reports were also mentioned but to a lesser extent. This highlights the importance of digital platforms and media channels in disseminating information about corporate sustainability efforts (Annex Table 15, Pg. 120).

> *"I recently came across an Instagram business that included a detailed message inside the packaging, printed on paper inserts, explaining their sustainability efforts. Despite being smaller in scale compared to giants like Flipkart, these businesses are making meaningful contributions and go the extra mile by including pamphlets that outline their environmental initiatives, along with helpful tips and guidelines"*
> *- 25 year old Woman School Teacher, Asansol*

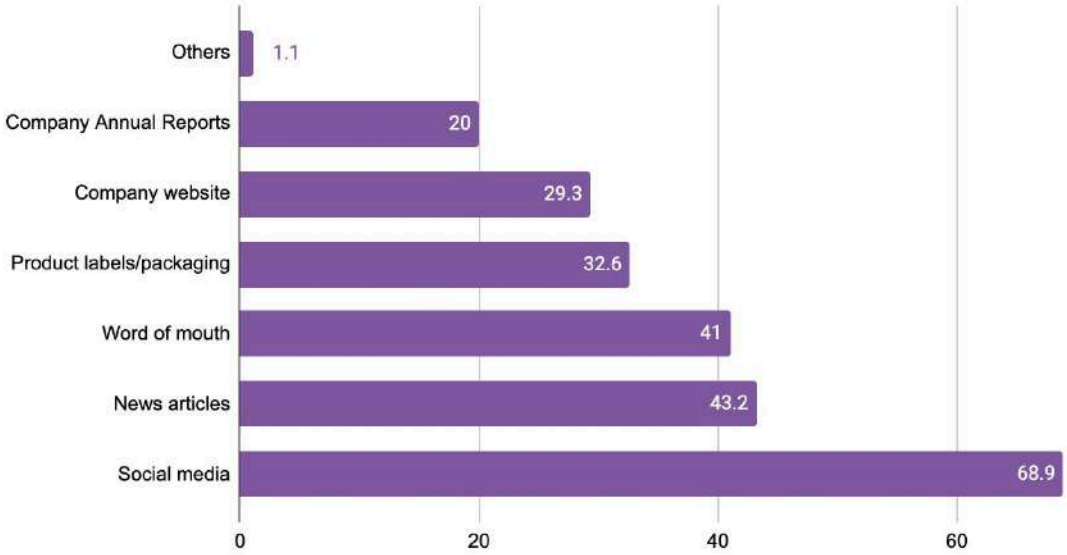


Fig 15: Distribution of respondents by their preferred source of information (n=3752)
** Multiple Responses

Analysis by gender showed that slightly higher proportion of males as compared to females depended on news articles (Males: 44%, Females: 42%) and company annual reports (Males: 22%, Females: 18%) for gathering information about the initiatives taken by companies for AQI reduction.

Table 3: Distribution of respondents by their preferred source of information by gender

Gender	Product labels/ packaging	Company website	Company Annual Reports	Social media	News articles	Word of mouth	Others
Male	31.9	29.5	21.7	68.8	44.2	40.1	0.9
Female	33.3	29.1	18,2	69	42.1	41.8	1.3

As regards different age groups, the older the respondents, the more they relied on word of mouth to learn about company initiatives (51 years & above – 55%, 41-50 years – 53%, 31-40 years – 40%, 18-30 years – 36%). Similarly, the younger group of respondents preferred to check the company websites to understand the company initiatives as compared to the older ones (18-30 years – 30%, 31-40 years – 30%, 41-50 years – 26%, 51 years & above – 23%).

Table 4: Distribution of respondents by their preferred source of information by age-group

Age Group	Product labels/ packaging	Company website	Company Annual Reports	Social media	News articles	Word of mouth	Others
18-30 years	30.4	30.2	19.5	69.1	42.3	36.4	0.8
31-40 years	35.2	30.8	18.3	69.9	43.5	40.3	1.4
41-50 years	33.2	26	22	69.1	44.2	52.7	0.9
51 years & above	39.6	23	27.2	62.7	47	55.3	3.2

FGD participants suggested various means by which the companies could inform the consumers about the environmental initiatives they take such as leveraging digital platforms such as websites, applications, and social media channels like vlogs and reels.

"Social media has emerged as a powerful tool for spreading awareness due to its reach across all age groups. Therefore, companies could effectively showcase their initiatives on their websites or apps and leverage the popularity of vlogs and reels by collaborating with influencers for impactful advertising".

According to FGD participants from Asansol, ***"the actions of prominent figures such as sports icons Ronaldo and Virat Kohli, who have used their social media platforms to advocate for environmental consciousness, showcase the impact and potential of leveraging these platforms for positive change. Their influence can inspire millions of followers to adopt eco-friendly practices, drive discussions on sustainability, and encourage companies to prioritize environmental responsibility"***

Few participants suggested creating dedicated sections on websites or apps that detail sustainability practices, achievements, and ongoing projects of the companies to educate and engage consumers. There were also suggestions on collaborating with influencers to intensify the message and reach a wider audience, especially among younger demographics who are more active on social media.

Participants from Delhi suggested including messaging directly on product packaging as an impactful way for companies to communicate their environmental initiatives.

"It will be effective if the companies advertise on their packaging about the initiatives they are taking for reducing AQI. Companies can follow the example of Hindustan Unilever, which printed donation messages on their product packaging."
– A 41-year-old Participant working in an IT company, Delhi

FGD Participants from Ahmedabad pointed out that several companies are using electric vehicles for last mile delivery. However, most people sitting at homes are not aware that the delivery boy has used electric vehicles. Therefore, they suggested that the companies should take efforts to inform customers about their sustainable practices, such as using electric vehicles for delivery or employing sustainable

packaging. They were of the view that this will raise awareness among consumers and allow them to make informed choices and support environmentally responsible businesses.

> *"If companies will mention the initiatives taken by them on their websites, apps, or packaging, companies can demonstrate their commitment to sustainability and also attract eco-conscious customers who prioritize environmentally friendly practices"*
> *- FGD Participants, Ahmedabad*

3.2.3 INFORMATION SOURCES ABOUT COMPANIES' INITIATIVES RELATED TO AIR POLLUTION REDUCTION

The comprehensive analysis reveals that the preferred source for receiving information about companies' actions against air pollution is social media campaigns (64%). Notably, the highest percentage stating this preference came from Kolkata (79%), followed by Delhi (74%) and Pune (73%). The next favoured sources were mobile apps (47%) and online articles (44%). Hubli/Dharwad had the highest number of respondents (68%) who preferred mobile apps for obtaining such information. Workshops or seminars and infographics are also among the preferred sources, although to a lesser extent at 33% and 23% respectively (Annex Table 16, Pg. 121).

A notable trend emerged from the study wherein a larger proportion of females expressed their preference for social media campaigns (80%) compared to males' (67%) and infographics/visual materials (35% compared to males' 24%) to stay updated on companies' efforts against air pollution. On the other hand, more males (55%) favoured mobile apps compared to females (36%).

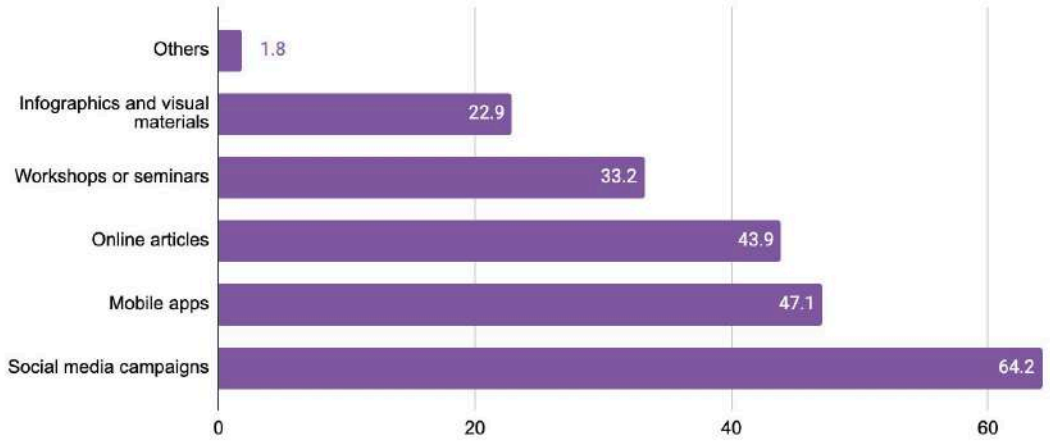


Fig 16: Distribution of respondents by their preference for source of receiving information about a company's actions for air pollution (n=3752) ** Multiple Responses

Table 5: Respondents' preference for source of receiving information about a company's actions for air pollution by gender

Gender	Workshops or seminars	Online Articles	Social media Campaigns	Mobile Apps	Infographics and visual materials	Others
Male	35.2	64.8	63.4	47.8	21.9	1.3
Female	31.0	69.0	65.1	46.3	23.8	2.3

Analysis by age groups indicated that the younger respondents leaned towards seminars/workshops, social media, online articles, and mobile apps to receive such information, while the older demographic showed a greater preference for infographics and visual materials. and visual materials was more among the older group of respondents.

Table 6: Respondents' preference for source of receiving information about a company's actions for air pollution by age-group

Gender	Workshops or seminars	Online Articles	Social media Campaigns	Mobile Apps	Infographics and visual materials	Others
18-30 years	32.5	47.5	63.3	46.0	21.9	1.3
31 - 40 years	34.4	42.1	65.6	47.5	23.8	2.3
41 - 50 years	31.2	37.9	64.8	51.6	23.8	2.3
51 years & above	38.7	35.0	63.1	44.2	23.8	2.3

During the focus groups in Asansol, participants indicated their preference for mobile apps, social media platforms and online articles to receive information about the initiatives taken up by companies.

> *"Traditional forms of advertising, like billboards, have taken a backseat to more interactive audio-visual formats. Today, audio-visual content reigns supreme in the advertising realm, even extending to banners. This shift reflects the evolving perspectives of people, influenced by the rapid pace of modern life. With technology enabling instant information access and evolving preferences, convenience and visual allure have become important in effective communication strategies"*
> *- A 23 year old FGD Participant working as a Product Manager, Asansol*

According to a participant from Ahmedabad, it will be a very good strategy for the companies to collaborate with schools to conduct educational programs, workshops, and campaigns that highlight the importance of sustainability and eco-friendly practices. During the workshops, they can highlight the initiatives taken by them to promote environmental sustainability.

> *"Many companies engage in CSR activities by donating to NGOs, which often receive significant publicity. Similarly, these companies should actively showcase their contributions to environmental protection and generate public awareness about their sustainability efforts"*
> *- FGD Participants, Coimbatore*

3.2.4 EFFECTIVENESS OF COMPANIES' EFFORTS IN CONVEYING AIR POLLUTION REDUCTION THROUGH PRODUCTS AND SERVICES

The majority of respondents (55%) found the communication regarding companies' efforts to reduce air pollution through their products or services to be effective to some extent indicating that there is room for improvement in communication strategies employed by companies. Approximately 37% considered the communication by the companies very effective. Only 8% of respondents found the communication not effective at all (Annex Table 17, Pg. 121).

According to FGD participants from Asansol, *"Zomato has highlighted its eco-friendly approach in their app, where they restrict the use of cutlery and plastic polythene. They provide detailed information about the plastic used, including its micron count and whether it is disposable or not, demonstrating their commitment to sustainability".*

Higher proportion of males (39%) believed that companies communicate their efforts to reduce air pollution (reduce AQI) through their products or services very effectively as compared to females (35%). There was not a significant difference observed among various age groups regarding their perceptions on the effectiveness of the company's communications

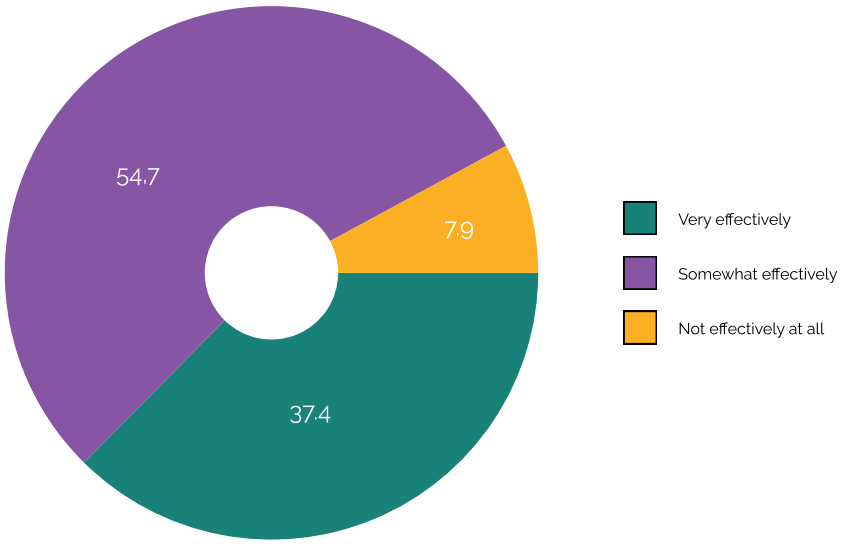


Fig 17: Distribution of respondents' perceptions on the effectiveness of companies' communication regardingair pollution reduction efforts (n=3752)

Table 7: Distribution of respondents' perceptions on the effectiveness of companies' communication regarding air pollution reduction efforts by gender and age-group

Characteristics	Very effectively	Somewhat effectively	Not effectively at all
Gender			
Male	39.1	53.2	7.6
Female	35.5	56.3	8.2
Age Group			
18-30 years	38.5	53.5	8.0
31-40 years	34.2	57.4	8.4
41-50 years	39.5	53.4	7.0
51 years and above	37.3	55.3	7.4

During the focus groups, several participants across the cities pointed out that Companies need to better advertise their environmental initiatives to raise consumer awareness and that the initiatives that they are currently taking are not sufficient.

> *"Companies should improve their advertising strategies by communicating their commitment to sustainability through different marketing channels. This kind of approach will help to build trust and loyalty among environmentally conscious consumers"*
> *– A 67-year-old Businessman, Delhi*

3.2.5 LIKELIHOOD OF SHARING INFORMATION

More than half of the respondents (51%) expressed a high likelihood of sharing information about a company's AQI reduction actions or commitments with friends and family. Additionally, 44% indicated a moderate likelihood of sharing such information, while only 5% stated that they are not likely to share it at all. This indicates a generally positive inclination among consumers to spread awareness about corporate initiatives aimed at reducing air pollution (Annex Table 18, Pg. 122).

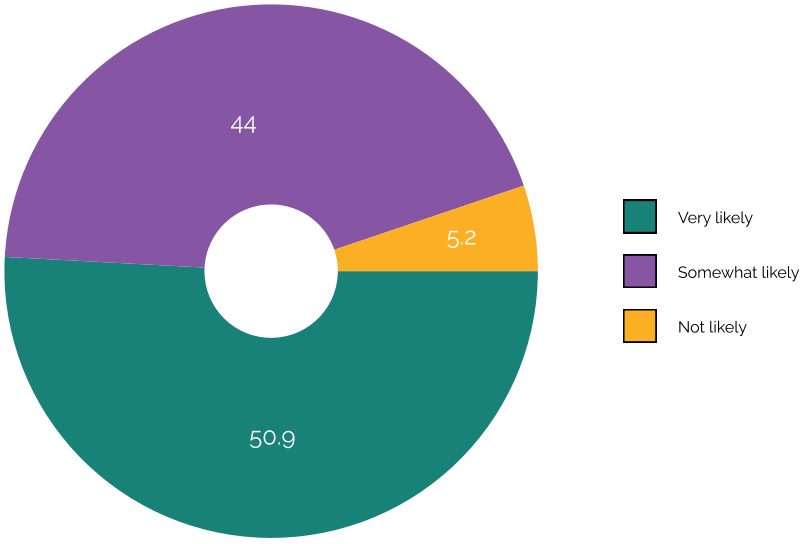


Fig 18: Distribution of respondents by likelihood to share information (n=3752)

Both the gender and age group-wise analysis did not show any significant differences as regards to the likelihood of sharing information with others.

Table 8: Distribution of respondents by likelihood to share information by gender and age-group

Characteristics	Very likely	Somewhat likely	Not likely
Gender			
Male	50.3	44.3	5.4
Female	51.5	43.6	4.9
Age Group			
18-30 years	50.4	43,9	5.7
31-40 years	50,5	45,3	4.2
41-50 years	51.8	41,9	6,3
51 years and above	54.8	43.3	1.8

3.3 THE INFLUENCE OF COMPANY COMMITMENT ON PURCHASING DECISIONS

3.3.1 IMPORTANCE OF A COMPANY'S COMMITMENT TO AQI REDUCTION IN CONSUMER PURCHASING DECISIONS

The data indicates that a significant majority of respondents across various cities considered a company's commitment to reducing air pollution as an important factor influencing their purchasing decisions. Specifically, 56% of respondents viewed it as very important, while 41% considered it somewhat important. Only a marginal 3% found it not important at all (Annex Table 19, Pg. 123).

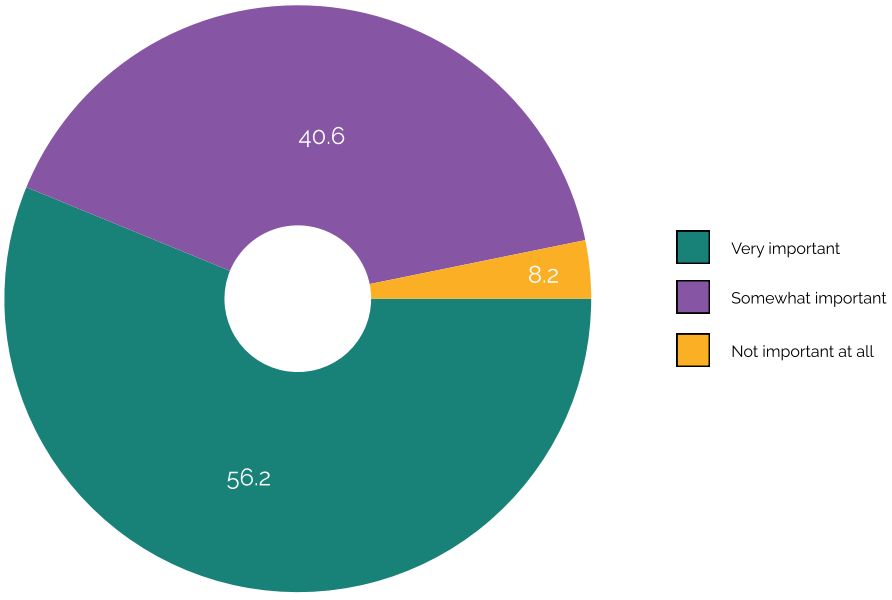


Fig 19: Distribution of respondents by importance of a Company's Commitment to reducing air pollution (AQI Reduction) in their purchasing decision (n=3752)

Not much of a difference was observed between male and female respondents in terms of their perception on the importance of a company's commitment to reducing AQI in their purchasing decisions.

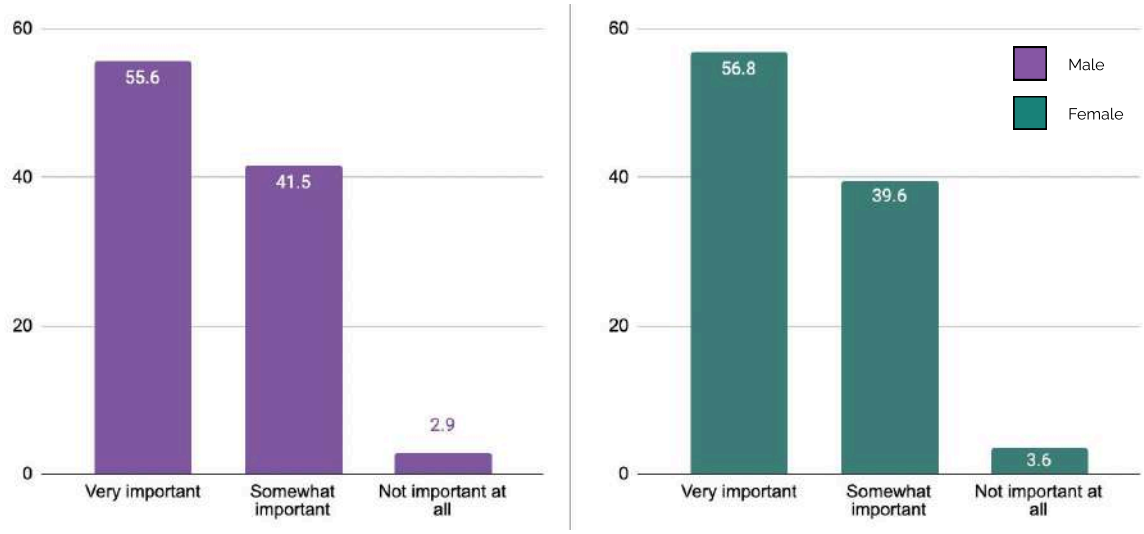


Fig 20: Gender-wise distribution of respondents by importance of a Company's Commitment to reducing air pollution (AQI Reduction) in their purchasing decision

Regardless of age, respondents generally shared a similar perception regarding the importance of a company's commitment to reducing AQI in their purchasing decisions.

Table 9: Age-group wise distribution of respondents by importance of a Company's Commitment to reducing air pollution (AQI Reduction) in their purchasing decision

Age Group	Very important	Somewhat important	Not important at all
18-30 years	57.1	39.3	3.6
31-40 years	52.8	44.2	3.0
41-50 years	58.3	39.5	2.2
51 years and above	57.6	38.7	3.7

The majority of participants in the FGDs held across various locations emphasized the significance of a company's commitment to reducing air pollution, stating that it would impact their purchasing choices. Nevertheless, a significant number of participants noted that while this commitment was important, it was not the sole factor guiding their purchasing decisions. They also considered other factors such as product quality, urgency and pricing before making a final choice. A student from Delhi stated,

"My decision will depend on the urgency. For urgent orders, prioritizing speed might outweigh environmental considerations. However, for non-urgent orders, I would choose the eco-friendly option".

Participants also highlighted that they are hesitant to pay extra for sustainable practices, fearing that these costs will continue to rise. They were of the view that even small price increases can deter purchases. Most of the participants, especially from Delhi and Ahmedabad, were of the opinion that consumers should not be charged extra for environmentally friendly options, such as paper bags. In the words of a 29-year old BPO employee from Ahmedabad, *"I firmly believe that both individuals and companies share equal responsibility for environmental protection. However, it is disheartening to see companies/businesses imposing additional charges under the guise of sustainability. It is really unfortunate that some stores persist in charging for bags despite government advisories"* The consensus among participants was clear: companies must prioritize sustainability without resorting to price hikes. They emphasized that businesses should bear the costs associated with sustainability initiatives, rather than burdening consumers with additional charges.
According to a homemaker from Coimbatore, *"Generally, I do not focus much on packaging or a company's emphasis on environmentally sustainable initiatives; instead, I give importance to the products I order. However, now that we are discussing this topic, I realize that these aspects are also crucial factors that should be considered and prioritized"*

According to a homemaker from Coimbatore, *"Generally, I do not focus much on packaging or a company's emphasis on environmentally sustainable initiatives; instead, I give importance to the products I order. However, now that we are discussing this topic, I realize that these aspects are also crucial factors that should be considered and prioritized"*

> *"I will assess both the product's usability period and its durability. However, my purchasing decision isn't solely based on a company's commitment to sustainability and reduced air pollution. If the same product is offered at a lower price by a company that doesn't prioritize air pollution reduction, I would still choose to buy from that company"*
> *– A 29 year old Customer Care Executive, Ahmedabad*

Few participants mentioned that they might accept slightly longer delivery times instead of higher prices. Instead of extra charges, consumers suggest companies provide information on their environmental efforts with each order *"if sustainability fees are added, it would become a financial burden for consumers. To build trust, companies should refrain from charging anything extra and instead incorporate sustainability costs into product prices"* - A Senior Citizen, Delhi

3.3.2 PRIORITIZING PRODUCTS OR SERVICES BASED ON A COMPANY'S COMMITMENT TO REDUCING AIR POLLUTION (AQI REDUCTION)

A substantial portion of respondents (59%) stated that they have actively chosen to purchase a product or service from a company based on its commitment to reducing air pollution. This further highlights the impact of environmental responsibility on consumer behaviour. Interestingly, there are slight variations across different cities, with Pune/Pimpri-Chinchwad exhibiting the highest percentage (87%) of consumers who have made such purchasing decisions (Annex Table 20, Pg. 124).

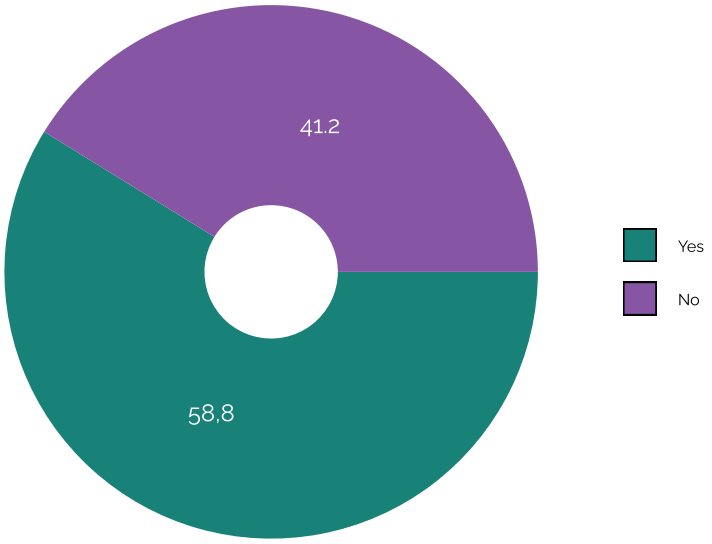


Fig 21: Distribution of respondents (consumers) preferences for products or services based on company's commitment to air quality improvement (AQI reduction) (n=3752)

During the focus groups, several participants mentioned that they purchase products from companies that focus on sustainability and use eco-friendly products for packaging. Some participants mentioned that they prefer purchasing glass bottles for sauce and jams over plastic pouches or squeezable packs although they are convenient to use. According to a middle-aged housewife from Delhi, "I choose glass-bottled ketchup or jam and prefer refillable sachets over single-use packaging, as it can help reduce waste". Few others stated that they make it a point to purchase products from companies that use recyclable containers and packaging for their products. I choose to buy cosmetics from brands like "Mama Earth" and "Oriflame" because they use recyclable white or transparent bottles for their packaging - A 37-year-old woman school teacher from Asansol

3.3.3 MOST IMPACTFUL ENVIRONMENTAL INITIATIVES INFLUENCING CONSUMER PURCHASING DECISIONS

The analysis indicates that among various environmental initiatives, the utilization of eco-friendly production methods emerges as the most impactful across all surveyed cities, with an average of 70% of respondents recognizing its significance in shaping their purchasing decisions. Following closely behind is the initiative of companies publicizing their commitment to environmental responsibility, with an average of 53% of respondents considering it impactful.

Additionally, the adoption of sustainable and renewable resources, along with the implementation of green technologies in operations, were both acknowledged by 47% of respondents each as influential in their purchasing decisions. Transparent reporting on environmental impact emerged as the least impactful environmental initiative according to respondents in influencing their decision to purchase from a company.

Table 10: Distribution of respondents by most impactful environmental initiatives on purchase decision (n=3752) **Multiple Responses

Publicized commitment to environmental responsibilities	Use of eco-friendly production methods	Adoption of sustainable and renewable resources	Implementation of green technologies in operations	Transparent reporting on environmental impact	Others
53.1	69.9	46.7	46.9	25.5	0.1

The location-wise analysis reveals that the majority of respondents from Asansol (81%), Delhi (77%), Pune (77%), Bangalore (72%), Coimbatore (72%), and Mumbai (70%) expressed that they would be influenced to purchase from a company if it employed eco-friendly production methods (Annex Table 21, Pg. 124).

> *I think people will want to support companies that make products in eco-friendly ways and use eco-friendly packaging as they will feel like they're part of something important*
> *– FGD Participant, Coimbatore*

Hubli-Dharwad (74%), Kolkata (70%) and Delhi (68%) had the highest proportion of respondents who resonated with the initiative of companies publicizing their commitment to environmental responsibility (Annex Table 21, Pg. 124). "Recently, some firecracker companies in Sivakasi have introduced green crackers to mitigate pollution. However, due to their higher cost, people do not prefer to purchase them" shared a 41-year-old entrepreneur trainer from Coimbatore

Analysis based on age categories revealed that higher number of respondents belonging to the older age groups (61% - above 51 years & 60% - 41-50 years) expressed their inclination to purchase from companies that implement eco-friendly production methods, as compared to the younger age groups, (18-30 years - 51%, 31-40 years – 53%). Likewise, a higher number of women (55%) as compared to men (52%) acknowledged the significance of companies publicizing their commitment to environmental responsibility. While 51% to 61% respondents in the age groups of 18 – 60 years supported this initiative, surprisingly none in the above 60 years favoured this initiative.

Table 11: Gender and age-group wise distribution of respondents by most impactful environmental initiatives on purchase decision

Characteristics	Publicized commitment to environmental responsibilities	Use of eco-friendly production methods	Adoption of sustainable and renewable resources	Implementation of green technologies in operations	Transparent reporting on environmental impact
Gender					
Male	51.7	68.8	46.8	45.2	24.7
Female	54.6	71.0	46.5	48.8	26.3
Age Group					
18-30 years	50.6	68.5	45.0	44.3	23.9
31-40 years	52.5	72.7	45.3	49.7	24.5
41-50 years	60.1	69.9	50.5	51.3	29.4
51 years and above	61.3	69.1	58.5	47.9	33.6

"I usually order food from Swiggy and Zomato as they have changed their packaging to eco-friendly alternatives. One change that I have noticed is that they no longer provide cutlery like spoons, tissues, and straws with orders. Instead, customers now have the option to opt in if they need these items. It is good to see such initiatives from these companies"
– A 41 year old Woman Content Developer, Coimbatore

3.4 CONSUMER BEHAVIOUR AND BRAND PERCEPTION IN RELATION TO AIR QUALITY IMPROVEMENT INITIATIVES

3.4.1 CONSIDERATIONS FOR SWITCHING BRANDS FOR STRONGER AIR POLLUTION REDUCTION COMMITMENT

According to the survey findings, 63% of respondents expressed a willingness to switch from their current brand to a competitor with a stronger commitment to reducing air pollution. Additionally, 24% respondents reported that they might consider switching, while only 13% denied any intention of switching brands. Pune (86%) and Bangalore (81%) had the highest proportion of respondents willing to switch brands based on a stronger commitment to reduce pollution. However, a majority of respondents from Ahmedabad (27%) and Kolkata (21%) were not interested in switching brands even if the competitor company had a stronger commitment to reducing pollution (Annex Table 22, Pg. 125).

Analysis by gender unveiled that male respondents (65%) were more likely to switch from their current brands to a competitor brand as compared to females (61%).

The data revealed that younger respondents, particularly those aged between 18 and 40 years, are more inclined to switch brands based on a company's commitment to reducing air quality index (AQI) compared to older age groups. Specifically, 64% of respondents in the 18-40 age group expressed a willingness to switch brands, while only 60% and 56% of respondents in the 41-50 and above 51 age groups, respectively, indicated a similar likelihood.

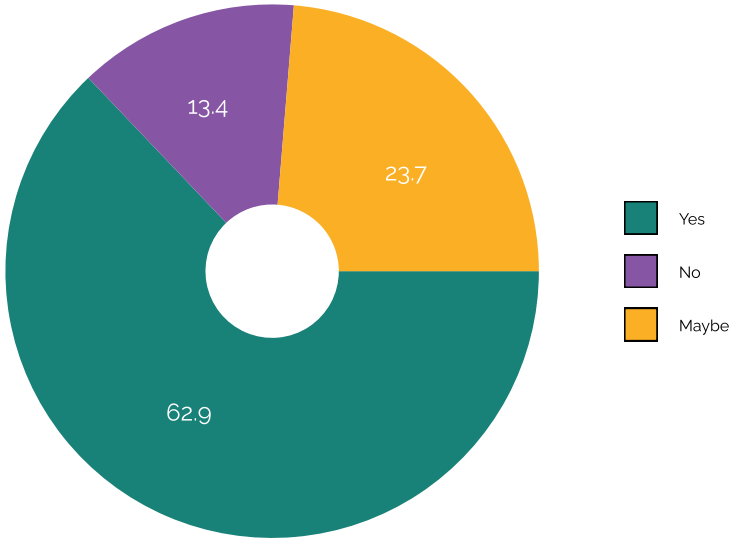


Fig 22: Percentage Distribution of Respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to reducing air pollution (AQI reduction) (n=3752)

Table 12: Gender and age-group wise distribution of respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to reducing air pollution (AQI reduction)

Characteristics	Yes	No	Maybe
Gender			
Male	64.6	14.2	21.2
Female	61.0	12.6	26.5
Age Group			
18-30 years	64.2	13.4	22.4
31-40 years	63.3	11.9	24.8
41-50 years	59.9	15.9	24.2
51 years and above	56.2	13.8	30.0

During the focus groups, numerous participants from various cities emphasized that while they value a company's strong commitment to reducing environmental pollution and promoting sustainability, they also take into account several other factors. These factors were the quality of the product, pricing, and the delivery time, among others, before making their purchasing decisions.

> *"I will only consider switching from my current brand to another if companies can effectively demonstrate how their products benefit both consumers' health and the environment. I would also look into how they excel in these aspects compared to other similar companies"*
> ***– A 21-year-old student, Ahmedabad***

According to a 32-year-old male working in an MNC in Coimbatore, "My primary considerations when choosing a product are its quality and cost. If both meet my budgetary constraints, I will then take into account the initiatives taken by the company".

3.4.2 LIKELIHOOD OF RECOMMENDING BRAND TO OTHERS BASED ON ITS AQI REDUCTION INITIATIVES

Regarding the likelihood of recommending brands based on their air quality improvement initiatives, the majority (52%) of respondents expressed a high likelihood of recommending with majority from Pune (72%) and Hubli/Dharwad (66%) stating so. Another 42% indicated being somewhat likely to recommend. Only 6% of respondents stated that they were not likely to recommend a brand based on its air quality improvement initiatives (Annex Table 23, Pg. 126).

The analysis by gender did not reveal any significant difference. However, the analysis by age groups showed that a majority of respondents in the older age groups were more likely to recommend brands based on the initiatives taken by them for air quality improvement. While 57% and 55% in the age groups of 51 years & above and 41-50 years were more likely to recommend, the corresponding figures for 31-40 years and 18-30 years was 50% and 52% respectively.

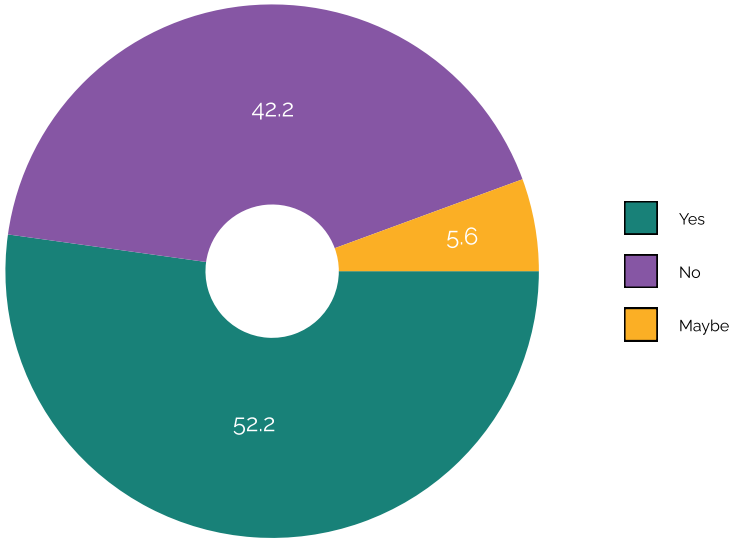


Fig 23: Percentage distribution of respondents by their likelihood to recommend brand based on its air quality improvement (AQI reduction) initiatives (3752)

Table 13: Gender and age-group wise distribution of respondents by their likelihood to recommend brand based on its air quality improvement (AQI reduction) initiatives

Characteristics	Very likely	Somewhat likely	Not likely
Gender			
Male	51.6	42.2	6.2
Female	52.9	42.1	5.0
Age Group			
18-30 years	52.1	41.2	6,7
31-40 years	49.9	44.9	5.2
41-50 years	55.1	41.5	3.4
51 years and above	56.7	39.6	3.7

SECTION 4

CONSUMER AWARENESS AND BEHAVIOUR IN EMISSION REDUCTION EFFORTS

4.1 FAMILIARITY WITH THE CONCEPT OF CORPORATE/BUSINESS RESPONSIBILITY FOR REDUCING EMISSIONS AND COMBATING CLIMATE CHANGE

The study revealed a balanced level of familiarity among respondents regarding corporate/business responsibility for reducing emissions and combating climate change. A combination of very familiar (40%) and somewhat familiar (48%) responses indicates a reasonable awareness of the concept. However, it is noteworthy that 12% of respondents reported being not familiar at all. The highest proportion of respondents who stated that they were very familiar with corporate/business responsibility were from Pune/Pimpri Chinchwad (77%) and Ahmedabad (64%), while the lowest proportions were from Asansol (22%) and Kolkata (26%) (Annex Table 24, Pg. 127).

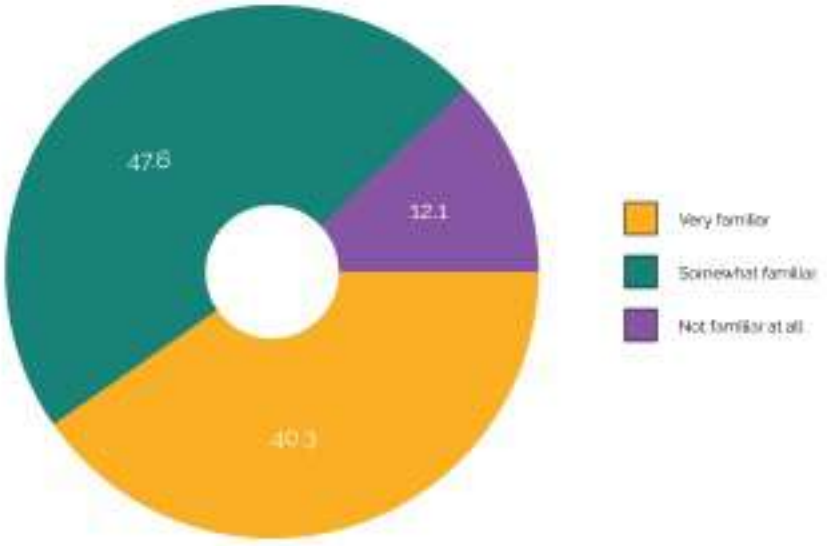


Fig 24: Percentage distribution of respondents by their familiarity with the concept of corporate/business responsibility for reducing emissions and combating climate change (n=3752)

Gender-based analysis indicated that a higher proportion of male respondents (43%) were highly familiar with CBS for emission reduction and climate change mitigation, compared to female respondents (38%). Likewise, when considering age groups, 44% of participants aged 18-30 were more acquainted with Corporate/Business Responsibility (CBR) in contrast to 35% in both the 31-40 and 51 years and older age brackets.

Table 14: Gender and age-group wise distribution of respondents by their familiarity with the concept of corporate/business responsibility for reducing emissions and combating climate change

Characteristics	Yes	No	Maybe
Gender			
Male	42.6	48.1	9.3
Female	37.8	47.1	15.1
Age Group			
18-30 years	43.6	45.5	10.9
31-40 years	35.0	51.8	13.2
41-50 years	40.1	47.5	12.5
51 years and above	35.0	48.4	16.6

Several respondents across the cities were aware of the fact that many companies have transitioned to battery-powered scooters for last-mile delivery to reduce emissions.

"I have noticed that there is a growing trend towards a complete shift to electric vehicles in the future. This shift is evident in the widespread adoption of lithium-based batteries, especially in courier companies and last-mile delivery services, as most of them are opting for battery-operated vehicles"
– A 30-year-old lab technician, Asansol , Asansol

During the focus groups, while the majority of the participants appreciated the transition to electric vehicles for the last mile delivery to reduce emissions, few of them expressed concerns about the production of lithium batteries contributing to pollution. Some others expressed doubts regarding whether the current charging infrastructures can adequately support a complete transition to electric vehicles. Participants in the focus group discussion (FGD) from Asansol expressed the view that solely transitioning to electric vehicles (EVs) for the last mile delivery is insufficient in effectively reducing pollution and emissions. Based on the perspective of a 31 year old school coordinator from Asansol, ***"While ordering from platforms like Flipkart, if your order is dispatched from Mumbai to Kolkata, it might be sent by flight for quicker delivery. However, upon arrival in Kolkata, items are typically transported by road using trucks or lorries for the final leg of the journey. Although using flights for delivery can expedite the process, it contributes to higher emissions compared to trains, especially since trains predominantly use electric engines now, reducing pollution greatly".***

As per a female school teacher from Coimbatore, ***"I wholeheartedly support initiatives like Big Basket's use of e-vehicles. While transitioning to electric vehicles is important for reducing emissions, it is equally important to ensure that our electricity infrastructure can support this shift. We must invest in renewable energy sources and smart grid technology to manage increased demand for electricity. I am of the opinion that this should be a collaborative effort involving governments, utility companies, and the private sector".***

FGD participants from Delhi were of the view that several companies are making significant efforts to reduce pollution and emissions. Some of the key initiatives mentioned by the participants were using alternative materials for packaging to reduce plastic usage, transitioning from petrol vehicles to electric vehicles for transportation, and implementing measures to control emissions.

4.2 IMPORTANCE OF A COMPANY'S COMMITMENT TO CARBON EMISSION REDUCTION IN CONSUMER PURCHASING DECISIONS

Nearly half of the respondents (46%) emphasized that a company's commitment to reducing carbon emission is very important for influencing their purchasing decisions while another 48% mentioned that it is somewhat important. However, a minority of 7% did not consider it important at all. This indicates a growing trend among consumers to align their purchasing decisions with eco-friendly practices (Annex Table 25, Pg. 127).

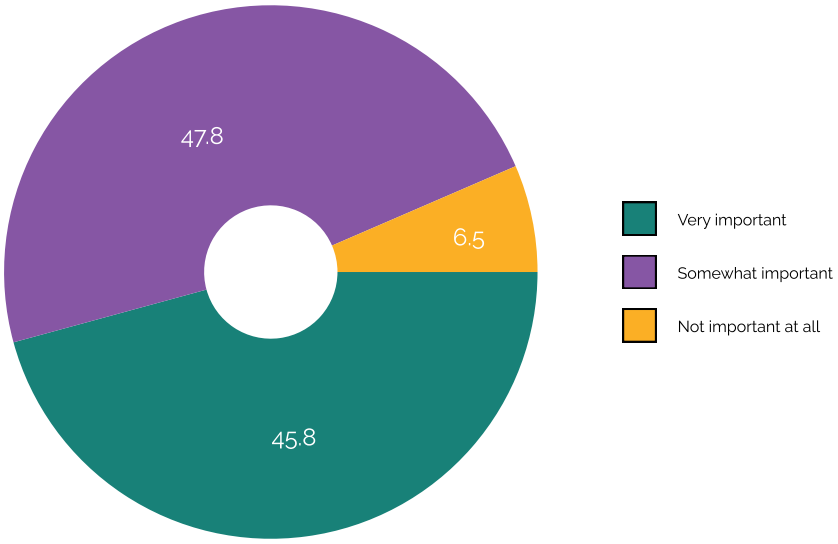


Fig 25: Distribution of respondents by importance of a Company's Commitment to reducing carbon emission reduction in their purchasing decision (n=3752)

Nearly 40% of male respondents considered a company's commitment to reducing carbon emissions as an important factor that can influence their purchasing decisions, whereas only 19% of female respondents shared the same sentiment.

During the focus groups, several respondents from Ahmedabad mentioned that if a company uses electric vehicles for delivering a product, they would be willing to wait longer for their product. This willingness to support electric vehicles indicates that the consumers are aware of environmental issues and wish to contribute positively to sustainability efforts taken by companies.

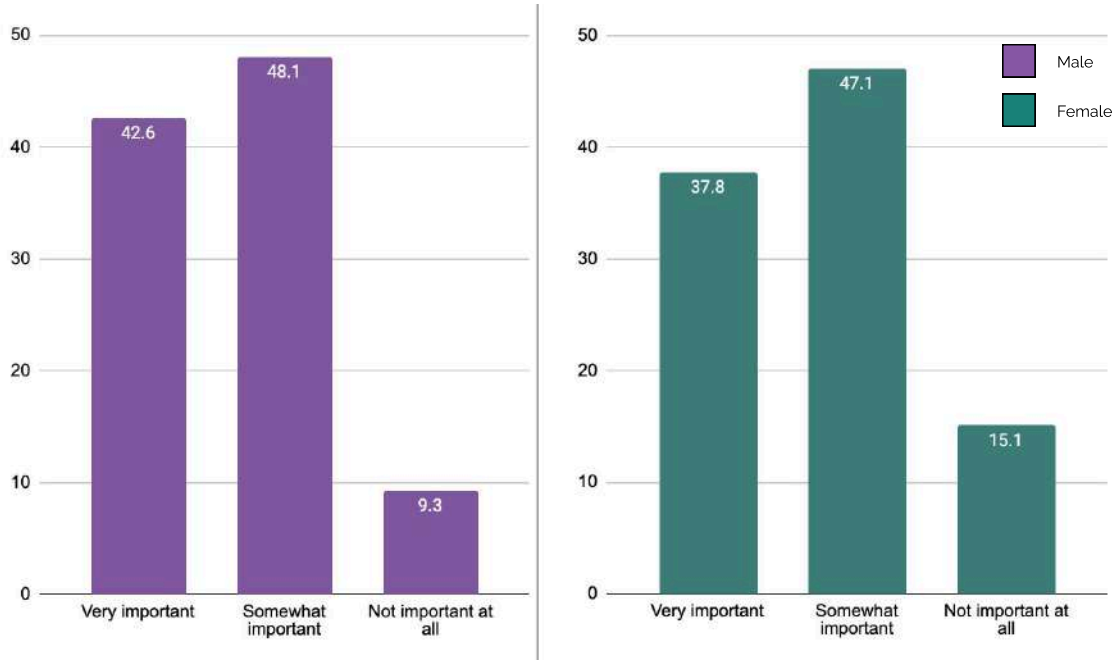


Fig 26: Gender-wise distribution of respondents by importance of a Company's Commitment to reducing carbon emission reduction in their purchasing decision

> *"I would not mind waiting a little longer if a company uses electric vehicles for their last-mile delivery"*
> *– A 43-year-old homemaker, Ahmedabad*

In Asansol, participants highlighted that it is very important to reduce the emissions caused by the delivery vehicles and emphasized that it is as crucial as cutting down on plastic use. ***"These vehicles emit harmful substances like suspended particulate matter (SPM), which can lead to health issues such as cancer. To address this issue, companies should transition to electric or hybrid vehicles, plan more efficient delivery routes, and ensure proper maintenance of their vehicles. Additionally, using filters to reduce emissions could be a potential solution.***

4.3 PRIORITIZING PRODUCTS OR SERVICES BASED ON A COMPANY'S COMMITMENT TO STRONG CLIMATE ACTION AND EMISSION REDUCTION

A significant majority of respondents (58%) stated that they have chosen to purchase a product or service based on a company's commitment to strong climate action and emission reduction. This indicates that more and more consumers have started to align their purchasing decisions based on the company's commitment to reduce emissions. City-wise analysis indicated that the highest proportion of respondents stating so were from Pune/Pimpri-Chinchwad (87%), Ahmedabad (76%) and Bangalore (75%) (Annex Table 26, Pg. 128).

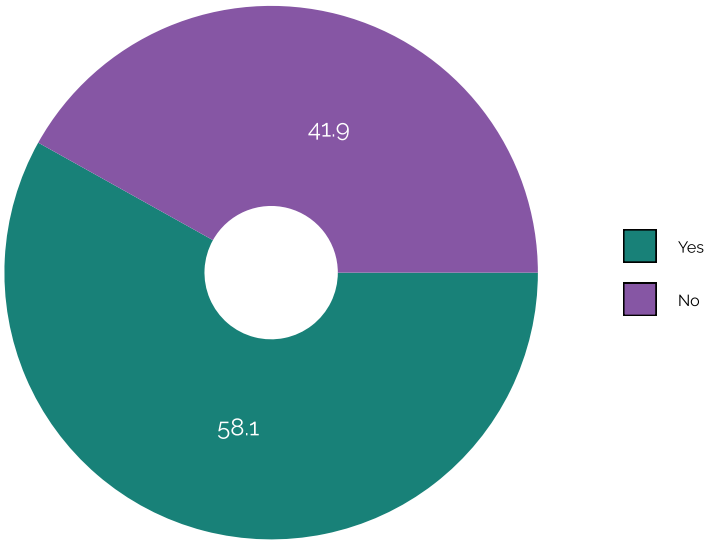


Fig 27: Distribution of respondents (consumers) preferences for products or services based on company's commitment to strong climate action and emission reduction (n=3752)

A higher percentage of males (62%) than females (54%) stated that they had chosen a product or service based on the company's commitment to reduce emissions.

The age group-wise analysis indicated that younger respondents are more likely to purchase products or services from companies based on their commitment to take climate action compared to older age groups. Specifically, 61% of respondents aged 18-30 and 58% of those aged 31-40 reported making purchases from such companies. In contrast, only 53% of respondents aged 41-50 and 47% of those aged above 51 stated doing the same.

Table 15: Distribution of respondents (consumers) preferences for products or services based on company's commitment to strong climate action and emission reduction by gender and age group

Characteristics	Yes	No
Gender		
Male	61.7	38.3
Female	54.1	45.9
Age Group		
18-30 years	60.7	39.3
31-40 years	58.3	41.7
41-50 years	53.1	46.9
51 years and above	46.5	53.5

4.4 CLIMATE ACTION AND EMISSION REDUCTION RELATED FACTORS INFLUENCING CONSUMERS PURCHASING DECISIONS

Factors related to climate action and emission reduction significantly influence consumers' purchase decisions. The most influential factor for respondents' purchase decisions regarding a company was the use of renewable energy sources in their operations, with 67% of respondents considering it significant. The highest proportion of respondents stating so were from Hubli-Dharwad (76%), Kolkata (75%) and Delhi (70%). This was followed by a company's publicized commitment to environmental responsibility, which influenced 56% of respondents, and the adoption of energy-

efficient production methods, (49%). Additionally, 38% of respondents mentioned that they would also consider purchasing from a company if it implements sustainable supply chain practices, while 21% would be influenced by transparent reporting on the company's carbon footprints (Annex Table 27, Pg. 129).

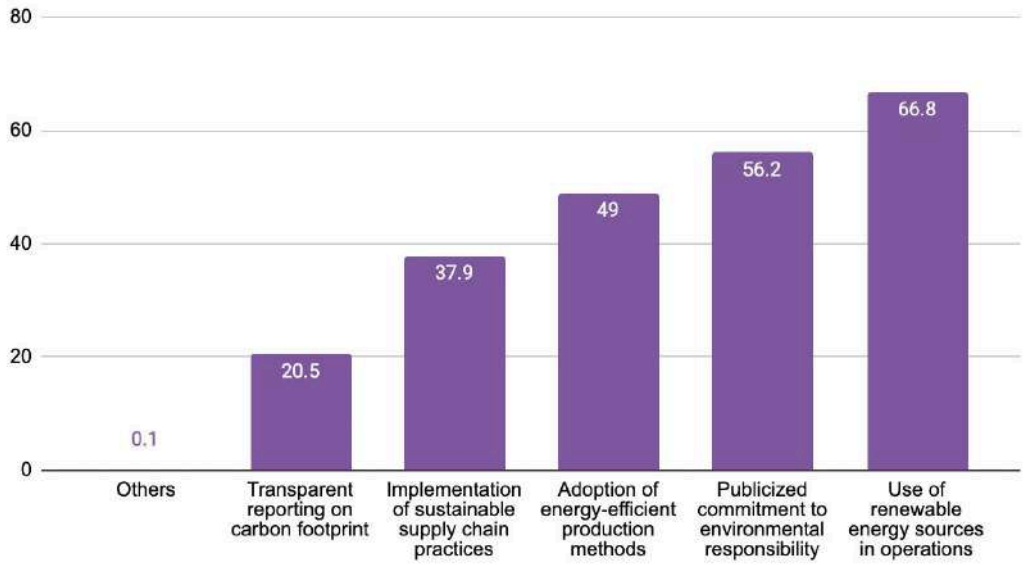


Fig 28: Percentage breakdown of respondents indicating factors related to climate action and emission reduction as influential in their decision to purchase from a specific company (n=3752)

During the focus groups, participants mentioned that while they would like to support and purchase from companies that focus on climate action and emission reduction, some of these companies charge extra for their sustainable initiatives. This pricing strategy acts as a deterrent for consumers, impacting their willingness to support such companies.

> *""Some companies charge more for their products, saying it's to help the environment. Like Tata Sampann products are very expensive, so people might not buy them. Even if companies save money by using electric vehicles, they usually don't make things cheaper for customers, so prices stay high"*
>
> *– FGD Participant working with American Express, Delhi*

Another participant from Ahmedabad mentioned about Blink it promotes pesticides-free products sourced directly from farms. However, he noted that the cost of these products is higher compared to regular products. He added that Blinkit also offers emergency services, and consumers might prioritize cost over environmental concerns during emergencies.

4.5 FINDING OUT ABOUT A COMPANY CLIMATE ACTION AND EMISSION REDUCTION INITIATIVES

When asked about how they learn about a company's initiatives for climate action and emission reduction, the majority of respondents (72%) stated that they find out through social media. This was followed by 48% of respondents who mentioned news articles, and 41% who rely on word of mouth. Additionally, 34% of respondents learnt about these initiatives through product labels or packaging, and 32% visit company websites to gather information (Annex Table 28, Pg. 129).

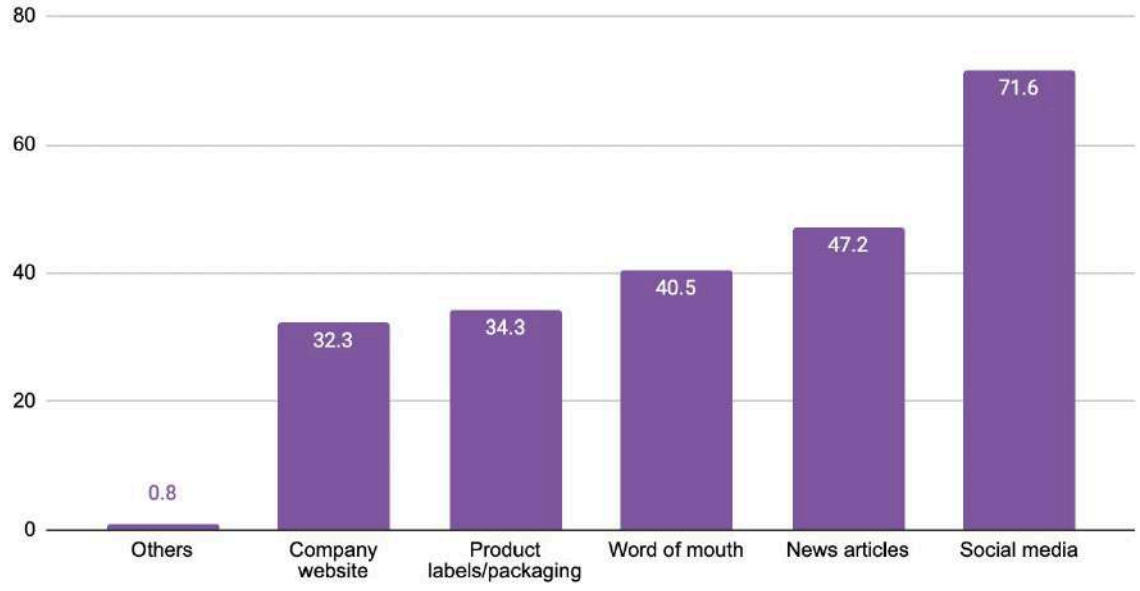


Fig 29: Distribution of respondents by sources for learning about companies' climate action and emission reduction initiatives (n=3752) **Multiple Responses

Focus group participants from Coimbatore stated that they have seen many companies use Twitter to communicate their sustainability initiatives. ***"I have seen some companies using advertisements, banners, and video clips, to engage with their audience. There are also companies that share their ideas and initiatives on their portals and websites, to make it more accessible to the public".***

Some participants from Delhi mentioned that they had seen advertisements on television regarding companies' initiatives for climate action, while others stated that they had heard social media influencers talking about certain companies transitioning towards sustainability. Few of them also learnt about company initiatives through their websites. ***"I have gone through the website of Mama Earth where it has been mentioned that they are involved in tree plantation initiatives as part of their sustainability efforts. The website also highlights that Mama Earth uses only environmentally friendly and safe ingredients in their products. Their stance against animal testing is also mentioned" – A middle aged homemaker, Delhi***

A Custom Care Executive from Ahmedabad working in a BPO, pointed out that he has seen initiatives taken by Unilever in creating awareness about reducing plastic usage through campaigns on platforms like Instagram. According to another participant from Ahmedabad, ***"Platforms like Swiggy offer customers the option to choose delivery using E-vehicles. While this may result in a slightly longer wait time for the delivery, it will contribute positively to reducing carbon emissions".***

4.6 EFFECTIVENESS OF COMPANIES' EFFORTS IN COMMUNICATING CLIMATE CHANGE MITIGATION AND EMISSION REDUCTION VIA THEIR PRODUCTS AND SERVICES

Overall, half of the sample respondents believed that companies communicate their efforts to mitigate climate change and reduce emissions only somewhat effectively through their products or services. However, 45% believed that companies are able to communicate very effectively, while a small proportion of 5% think companies do not communicate effectively at all (Annex Table 29, Pg. 130).

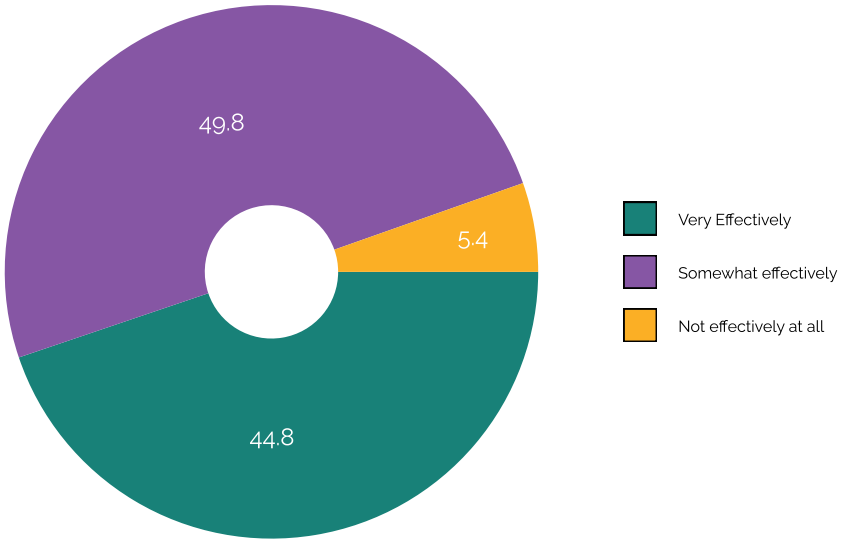


Fig 30: Distribution of respondents based on their perceptions of companies' effectiveness in communicating climate change mitigation and emission reduction via their products and services

The analysis shows that a slightly higher percentage of male respondents (46%) than female respondents (44%) perceived companies to be very effective in communicating their efforts to mitigate climate change and reduce emissions. No significant difference was noted among different age groups regarding their perception of companies in their effectiveness in communicating their efforts to mitigate climate change and reduce emissions

Table 16: Distribution of respondents based on their perceptions of companies' effectiveness in communicating climate change mitigation and emission reduction via their products and services by gender and age-group

Characteristics	Very effectively	Somewhat effectively	Not effectively at all
Gender			
Male	45.9	48.6	5.5
Female	43.6	51.1	5.3

Age Group			
18-30 years	45.6	48.9	5.5
31-40 years	43.3	51.7	5.0
41-50 years	45.1	48.6	6.3
51 years and above	43.3	52.1	4.6

During the focus groups, participants across the cities were of the view that companies are not able to effectively communicate their efforts to mitigate climate change and reduce emissions through their products or services. Participants from Ahmedabad were of the view that while many companies are promoting the use of electric vehicles, they are not effectively creating awareness about this initiative across all platforms. They were of the view that there is a need to create more awareness through various channels and platforms so that a larger audience is informed about the benefits of using electric vehicles

> *"When a delivery is made to a customer's home, they may not be aware of whether the delivery partner is using a regular or electric vehicle. Therefore, companies should mention such information, either on various social media platforms, websites or on the packaging, to inform customers about the use of electric vehicles or sustainable packaging. This transparency will help customers make informed choices and encourage them to prefer companies that prioritize environmental sustainability."*
> *– A 32-year-old Engineer, Ahmedabad*

Asansol participants opined that companies should incorporate clear messaging on their packaging regarding their environmental initiatives because only then can they effectively inform and influence consumers' decisions and encourage them to support companies that prioritize sustainability.

During qualitative interactions with participants from Coimbatore, it was noted that the majority of people who order online lack awareness about the sustainability initiatives undertaken by companies because these initiatives are not adequately highlighted or communicated.

> *"Delivery apps should incorporate a template in delivery apps with company offers and logos showcasing their commitment to being pollution-free and eco-friendly. By including an eye-catching logo that symbolizes sustainability and environmental responsibility, customers will naturally notice and become more aware of these initiatives. This logo can serve as a visual cue for customers to associate the company with eco-friendly practices, making it easier for them to make informed choices and support sustainable businesses. Standardizing such templates across delivery apps can effectively raise awareness and encourage environmentally conscious decision-making among consumers"*
> *- Student, Coimbatore*

4.7 CONSUMER BEHAVIOR AND BRAND PERCEPTION IN RELATION TO EMISSION REDUCTION

4.7.1 CONSIDERATIONS FOR SWITCHING BRANDS FOR STRONGER COMMITMENT TO EMISSION REDUCTION

Approximately 66% of the respondents indicated a willingness to switch from their current brand to a competitor brand if the competitor demonstrated a stronger commitment to emission reduction, with 21% willing to consider this possibility. However, 14% of the respondents stated that they would not switch from their current brand under any circumstances. The highest proportion of respondents who were willing to switch brands were from Pue/Pimpri Chinchwad (85%) and Bangalore (80%) (Annex Table 30, Pg. 131).

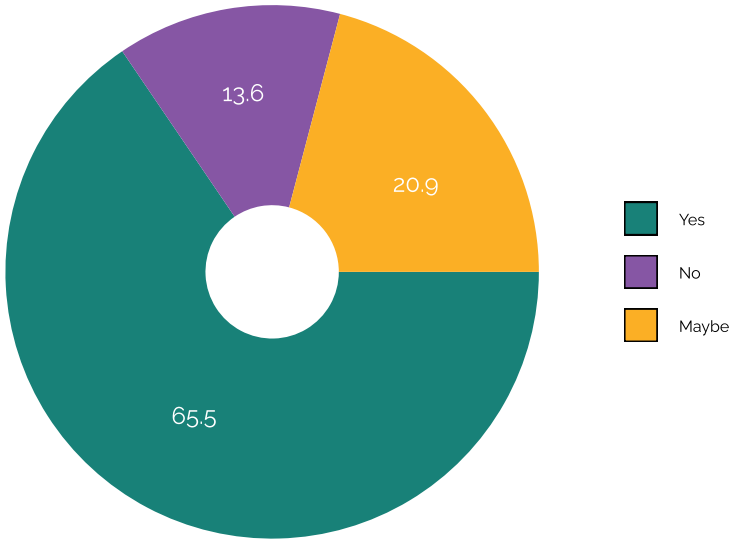


Fig 31: Percentage Distribution of Respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to emission reduction (n=3752)

Higher proportion of male respondents (68%) indicated that they would switch brands provided the competitor brand has strong commitment towards emission reduction as compared to females (64%). Likewise, a slightly higher proportion of younger respondents expressed their willingness to transition from their current brand as compared to older groups of respondents.

Table 17: Gender and age-wise distribution of Respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to emission reduction

Characteristics	Yes	No	Maybe
Gender			
Male	67.6	13.7	18.8
Female	63.5	13.4	23.2
Age Group			

18-30 years	**66.2**	**14.5**	**19.2**
31-40 years	**66.5**	**12.2**	**21.3**
41-50 years	**63.0**	**13.2**	**23.8**
51 years and above	**61.8**	**12.0**	**26.3**

During discussions with participants in Delhi, one of them shared that he used to buy a certain brand of jam packaged in a plastic jar. He later switched to a different brand that used glass jars. However, he did express his concern about the possibility of the glass jar breaking during transportation.

An FGD participant from Ahmedabad stated that he usually prefers to purchase products from Blink It as they use paper bags for packaging its products. However, he mentioned that there were instances where the paper bags tore due to the weight of items like 2.5-liter cold drink bottles and frozen goods, resulting in wet and damaged bags. He suggested that Blink it could use thermocol instead of paper bags for cold drinks and frozen products.

> *"Swiggy and Instamart are the best for ordering frozen items because of their excellent packaging. When I ordered ice cream from them last week, the packaging was specially designed with a silver coating inside the bag. This helped protect the items from the external atmosphere, ensuring they don't melt even during long-distance travel"*
> *– A 37-year-old Homemaker, Ahmedabad*

4.7.2 LIKELIHOOD OF RECOMMENDING BRAND TO OTHERS BASED ON ITS EMISSION REDUCTION INITIATIVES

More than 50% of the respondents expressed a strong likelihood of recommending a brand to others when considering its emission reduction initiatives, 44% indicate they are somewhat likely to recommend, while other 6% stated that they are not likely to recommend a brand based on its emission reduction efforts (Annex Table 31, Pg. 131).

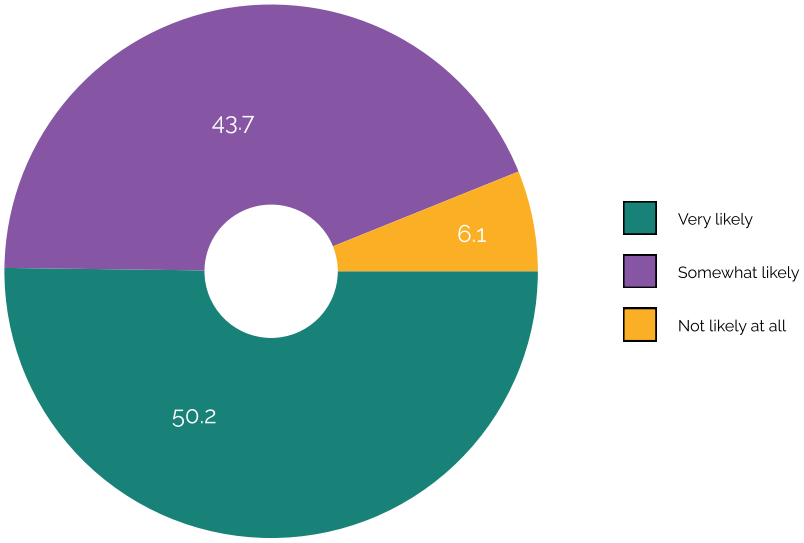


Fig 32: Percentage distribution of respondents by their likelihood to recommend brand based on its emission reduction initiatives (n=3752)

The gender-wise analysis suggests that there is no difference between male and female respondents in terms of recommending brands to others based on their emission reduction initiatives. Similarly, there is also no significant difference among different age groups in this regard.

Table 18: Gender and age-wise distribution of respondents by their likelihood to recommend brand based on its emission reduction initiatives

Characteristics	Very likely	Somewhat likely	Not likely
Gender			
Male	**50.1**	**43.2**	**6.6**

Female	50.2	44.3	5.5
Age Group			
18-30 years	50.5	42.6	6.9
31-40 years	49.3	45.5	5.1
41-50 years	48.9	45.5	5.6
51 years and above	53.9	41.0	5.1

4.8 AWARENESS ABOUT COMPANIES ESG REPORTING

Overall, 59% of the respondents indicated that they were aware of reports released by companies detailing their ESG compliance initiatives and progress, including key actions and commitments toward environmental and social sustainability. The highest proportion of respondents stating this were from Pune/Pimpri Chinchwad (86%) and Ahmedabad (84%), followed by Chennai (72%) and Bangalore (72%) (Annex Table 32, Pg. 132).

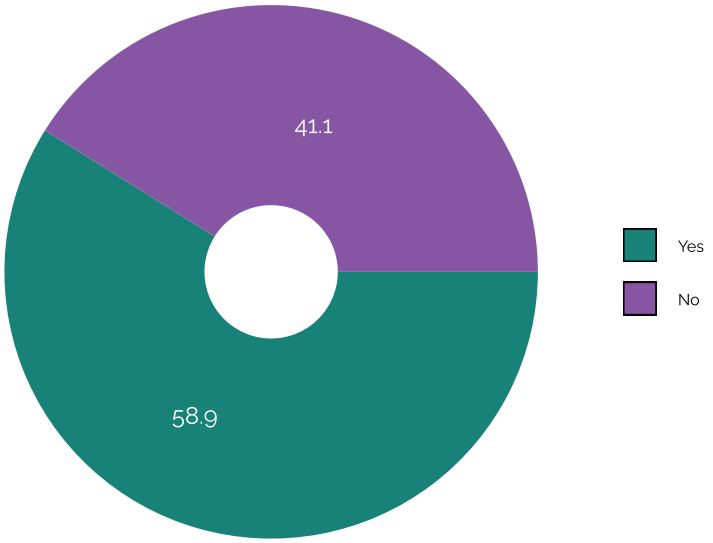


Fig 32: Percentage distribution of respondents by their likelihood to recommend brand based on its emission reduction initiatives (n=3752)

The awareness of the company reports detailing their ESG compliance initiatives was higher among males (62%) than females (42%).

It is important to note that the majority of respondents haven't encountered formal reports or report formats. However, they indicated that they become aware of companies' environmental and social sustainability initiatives and commitments through brief advertisements, posters, and highlighted points disseminated or promoted by the companies.

According to a 25-year-old Accountant from Ahmedabad, few companies are using Twitter to communicate their sustainability initiatives. He stated that he has seen some companies using advertisements, banners, and video clips, to engage with their audience. *"There are also companies that share their ideas and initiatives on their portals and websites, to make it more accessible to the public".*

An FGD participant from Coimbatore stated that he had come across an article discussing Green Supply Chain Management, highlighting how some companies have begun recycling their products as part of their sustainability efforts.

> *"I came to know about environmental initiatives taken by companies through advertisements. I learnt about the initiatives taken by Amazon because while shopping from Amazon, people can participate in programs that allow them to donate items for recycling"*
> *– A Homemaker, Ahmedabad*

Among respondents aware of reports on ESG compliance initiatives by companies, the majority (17%) cited social media platforms such as Facebook as their source of information. This was followed by television/radio (16%) and print media (15%). Additionally, social media platforms like Instagram, reels, YouTube, and vlogs were mentioned by 13% of respondents, while 12% stated that they learned about these initiatives through LinkedIn posts (Annex Table 33, Pg. 133).

Table 19: Distribution of respondents by source of information regarding ESG reporting by companies (n=2210) **Multiple Responses

Media-Print	Media-Online	Company websites	Social media-Facebook/X/ threads posts	Social media-Instagram/ facebook reels, youtube shorts & vlogs
14.5	2.4	0.2	17.2	13.2

Social media-Linked-in posts	TV/ Radio	Word of mouth	Whats app	Mobile apps of the company	Others
11.7	16.2	4.1	10.1	7.5	2.9

"I learnt about Mama Earth's environmental initiatives of using sustainable products, tree planting and reduced use of plastic through TV advertisements and social media influencers"
- A middle aged Homemaker, Delhi

The majority of respondents (60%), find it somewhat easy to comprehend company reporting in various areas. Additionally, 24% of the respondents express that they find it very easy to understand, while 16% indicate difficulties in comprehending the company's reporting (Annex Table 34, Pg. 134).

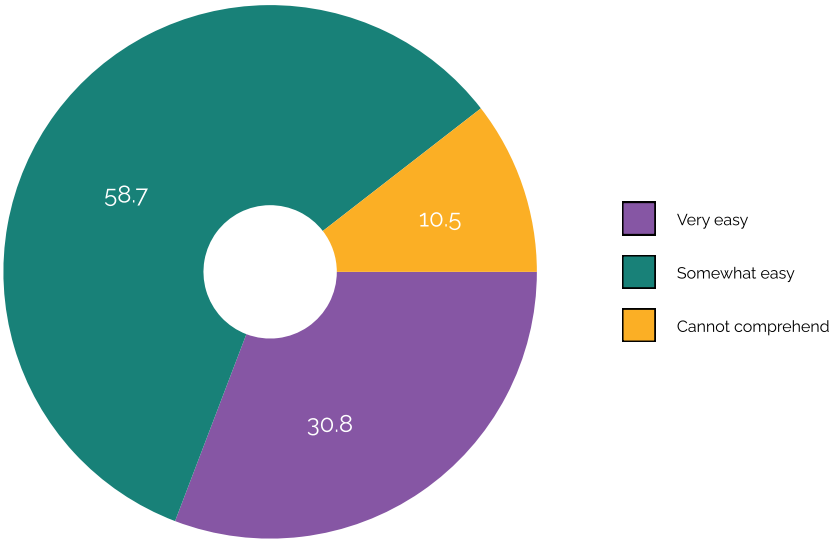


Fig 34: Respondents' perceived ease of understanding company reporting across various areas (n=2210)

SECTION 5

UNDERSTANDING CONSUMER PERCEPTIONS, PREFERENCES, AND SUPPORT FOR EV ADOPTION AND SUSTAINABLE PRACTICES IN COMPANIES

5.1 AWARENESS AND PERCEPTION OF EV ADOPTION BY COMPANIES

5.1.1 PERCEPTION OF RESPONDENTS ON THE IMPORTANCE OF COMPANIES UTILIZING EVS IN THEIR OPERATIONS

A significant proportion 98% of respondents believed that it is important (very important - 65%, somewhat important – 33%) for companies to integrate electric vehicles into their operations to tackle air pollution and climate emissions. These findings suggest a high level of awareness and concern among respondents regarding the environmental impact of transportation choices made by businesses. Among the surveyed locations, Pune/Pimpri Chinchwad had the highest percentage of respondents (83%) who believed that it is "very important" for companies to use electric vehicles. Following closely were Asansol (78%) and Kolkata (71%), showing significant support for the adoption of electric vehicles (Annex Table 35, Pg. 134).

There was no noticeable trend across different age groups regarding their perception of the significance of companies integrating electric vehicles into their operations.

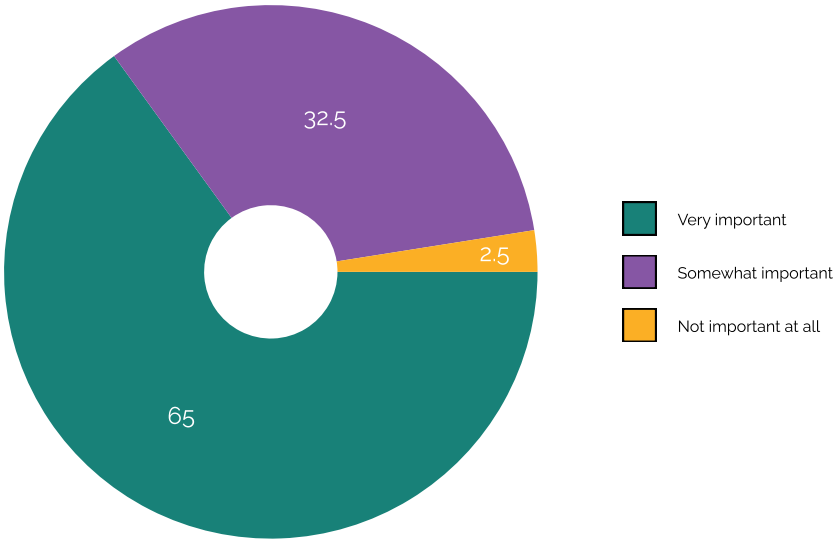


Fig 35: Percentage distribution of respondents by their perception on the importance of companies utilizing EVs in their operations (n=3752)

Table 20: Age-group wise distribution of respondents by their perception on the importance of companies utilizing EVs in their operations

Age Group	Very Important	Somewhat important	Not at all important
18-30 years	66.6	30.3	3.1
31-40 years	61.0	37.1	1.9
41-50 years	64.8	32.9	2.4
51 years and above	68.7	30.4	0.9

Most of the FGD participants were aware that several companies are using electric vehicles for their last mile deliveries. Participants particularly mentioned that they had come across Big Basket, Porter, Zomato, Swiggy and Zepto using electric vehicles for deliveries. Apart from this, some of them also mentioned that Dunzo and Zepto have started to use jute and paper bags.

According to a FGD participant from Ahmedabad, *"Swiggy offers the option of selecting e-vehicles for deliveries, which may require a slightly longer wait time but I usually opt for the electric vehicles because it is beneficial for the environment".*

Interactions with participants across the cities revealed that they believed it is very important for companies to integrate electric vehicles in their fleets to reduce emissions.

> *"Choosing environmentally friendly practices like using E-vehicles for deliveries can significantly benefit future generations by reducing pollution, a major cause of various health issues. It is crucial for companies to incorporate E-vehicles into their last-mile delivery systems, and the general public should also consider adopting these vehicles to contribute to a cleaner and healthier environment"*
> *- 41-year-old Engineer, Ahmedabad*

5.1.2 RESPONDENTS' AWARENESS OF COMPANIES' COMMITMENTS TO TRANSITIONING TO EVS

At an aggregate level, around 43% of respondents were aware of e-commerce, food delivery, hyperlocal grocery, and courier companies' commitments to transitioning to electric vehicles. City-wise analysis revealed that awareness was highest among respondents from Pune/Pimpri Chinchwad (68%), Chennai (67%), and Coimbatore (60%). However, a significant majority of respondents (57%) were unaware of such commitments, indicating a potential gap in information dissemination.

When considering gender, female respondents (40%) showed lower levels of awareness about company commitments to EV compared to males (46%). Interestingly, in terms of age groups, the analysis did not reveal any consistent patterns regarding awareness levels.

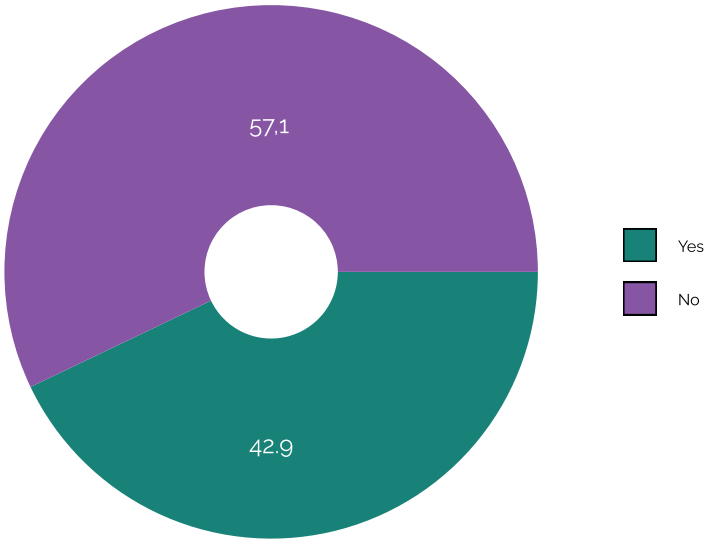


Fig 36: Percentage distribution of respondents by their awareness on companies (e-commerce, food delivery, hyperlocal grocery and courier companies)' commitments to transitioning to EVs (n=3752)

5.1.3 COMPANY COMMUNICATION REGARDING EV TRANSITION PLANS

Overall, only 46% of respondents reported that they had received information about companies' EV transition plans while a substantial portion (54%) remained uninformed, highlighting potential challenges in communication and outreach efforts by companies. The awareness levels were lowest among the respondents of Asansol (11%) and Kolkata (16%) (Annex Table 36, Pg. 135).

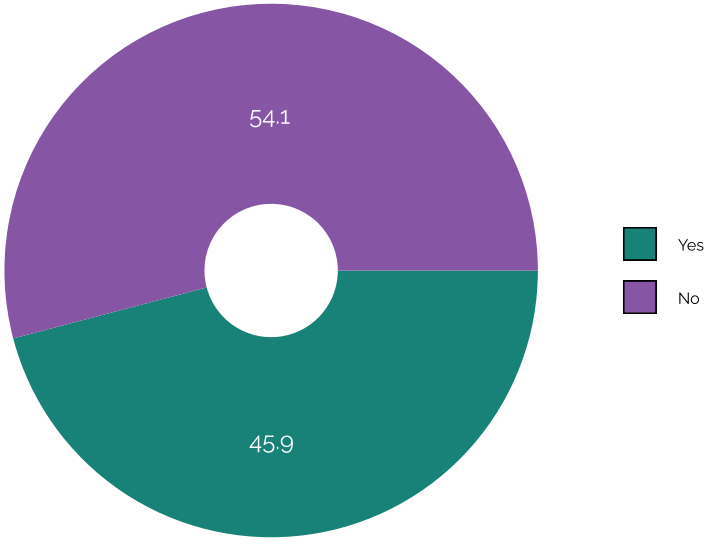


Fig 37: Percentage distribution of respondents based on receipt of information from companies regarding their EV transition plans and medium of information receipt (3752)

An interesting trend emerged in the analysis by different age groups regarding awareness of companies' commitments to transition to electric vehicles. The data showed that the younger the age group of the respondents, the higher their awareness levels about these commitments. Specifically, nearly 49% of respondents in the 18-30 years age group stated that they had received information about company commitments, followed by 45% in the 31-40 years age group. In comparison, 40%, and 33%, in the age groups of 41-50 years and above 51 years, respectively, reported the same level of awareness.

Similarly, a higher proportion of male respondents (48%) had information about the transition to electric vehicles compared to female respondents (43%).

Table 21: Gender and age-wise distribution of respondents based on receipt of information from companies regarding their EV transition plans and medium of information receipt

Characteristics	Yes	No
Gender		
Male	**48.2**	**51.8**
Female	**43.4**	**56.7**
Age Group		
18-30 years	**49.2**	**50.8**
31-40 years	**45.2**	**54.8**
41-50 years	**40.4**	**59.6**
51 years and above	**32.7**	**67.3**

Respondents who had stated that they had received information about companies' commitment towards transition to EVs, were asked the source of information. Social media platforms, particularly online media (42%), Instagram and YouTube (40%) and Facebook (28%), emerged as significant sources of information. Traditional media such as print (24%), TV & radio (29%) also played a role in disseminating information. Word of mouth (31%) and company websites (28%) were other notable sources mentioned by respondents (Annex Table 37, Pg. 136).

Table 22: Distribution of respondents by source of information from companies about their EV transition plans (*Base (N): 3752)

Media-Print	Media-Online	Company websites	Social media-Facebook/X/ threads posts	Social media-Instagram/ facebook reels, youtube shorts & vlogs
23.9	42	27.8	28	39.7

Social media-Linked-in posts	TV/ Radio	Word of mouth	Whats app	Mobile apps of the company	Others
20	28.9	30.6	15.8	8.2	0.4

According to FGD participants from Asansol, "Social media platforms, such as Instagram, are incredibly powerful tools for spreading awareness. ***Companies can use their social media presence to share their sustainability initiatives, whether through posts, stories, or advertisements. Additionally, including information about their environmental efforts on product packaging or inserts can educate consumers and reinforce their commitment to sustainability".***

5.2 FACTORS INFLUENCING PERCEPTION

5.2.1 EV TRANSITION FACTORS INFLUENCING CONSUMER PERCEPTION OF COMPANIES

Respondents were asked about the factors related to the transition to electric vehicles that influenced their perception of companies. The majority of respondents (69%) mentioned investment in EV charging infrastructure, closely followed by the use of renewable energy sources in operations (68%). Additionally, nearly 46% stated that they would be influenced by transparent reporting on environmental impact. The data indicates that a significant majority of respondents from Delhi, Asansol, Mumbai, and Pune/Pimpri-Chinchwad (ranging from 75% to 89%) stated that their perception of a company would depend on the company's investment in EV charging infrastructure. On the other hand, a majority of respondents from Kolkata, Asansol, and Hubli/Dharwad mentioned that their perception would depend on companies using renewable energy sources in their operations (Annex Table 38, Pg. 137).

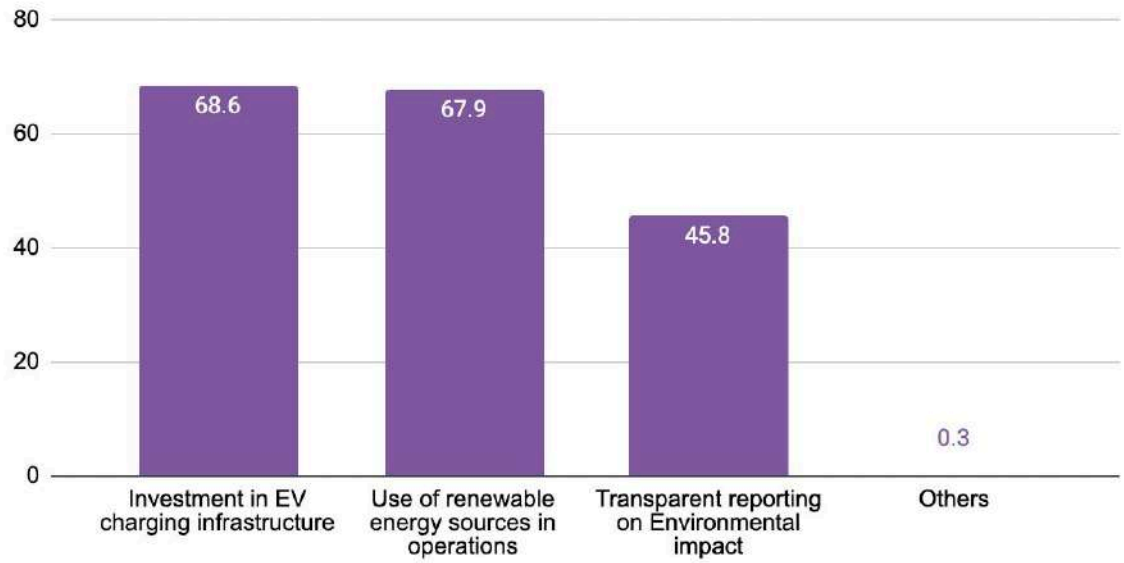


Fig 38: Distribution of respondents indicating factors influencing their perception of companies (n=3752)
**Multiple responsesa

5.2.2 TRUSTING COMPANIES' CLAIMS AND COMMITMENTS REGARDING THEIR TRANSITION TO ELECTRIC VEHICLES

In general, only 31% of respondents expressed complete trust in companies' claims and commitments regarding environmental initiatives, while 45% stated that they somewhat trusted these claims. A further 20% of respondents remained neutral on the matter, while a relatively low 5% indicated that they do not trust the claims and commitments made by companies (Annex Table 39, Pg. 137).

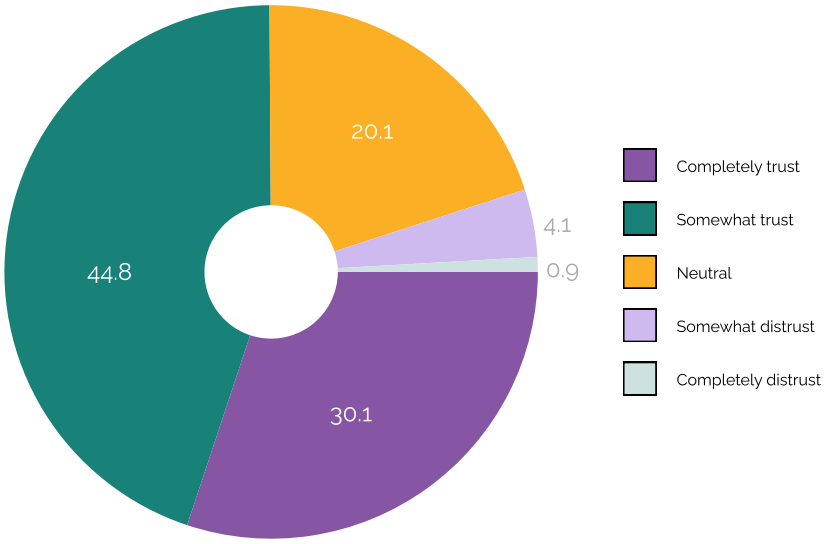


Fig 39: Percentage distribution of respondents by their trust on companies' claims and commitments regarding their transition to electric vehicles (n=3752)

During the focus groups, a participant from Delhi raised concerns about companies claiming to recycle but expressed skepticism about fully trusting their claims. Likewise, a respondent from Ahmedabad pointed out that it is important to first check the motivations of companies for transitioning to electric vehicles. According to him, while some may genuinely aim to reduce pollution and emissions as part of their commitment to environmental sustainability, others may do so for meeting regulatory requirements or as a strategic move for positive publicity and to enhance their brand image as environmentally conscious organizations.

> *"While several companies' apps claim they are working to reduce plastic waste, we are not sure if it is true. It is difficult to verify the accuracy of this statement"*
> *– 36-year old Male Supervisor, Asansol*

5.2.3 ACTIONS OR INFORMATION THAT WOULD INCREASE CONSUMERS TRUST IN A COMPANY'S EV TRANSITION PLANS

A significant majority of respondents emphasized that real-time progress or changes on the ground (63%) would increase their trust in a company's electric vehicle (EV) transition plans. This was closely followed by active and consistent communication with consumers (57%) and data transparency (50%).Here it is important to mention that although during the survey, only half of the respondents mentioned data transparency, during the focus groups, majority of participants across the locations expressed the belief that companies ought to prioritize transparency with their customers in order to gain their trust. Approximately 26% of respondents indicated that if a company commits to clear-cut transition milestones, they would trust them.

The highest proportion of respondents who stated that their trust in a company's transition plans would increase if they provide real-time progress were from Delhi (82%), Asansol (78%), Kolkata (75%), and Pune/Pimpri Chinchwad (75%). Similarly, maximum respondents who emphasized a company's active communication with consumers were from Hubli/Dharwad (80%), Kolkata (77%), and Asansol (71%). These findings highlight the importance of transparency, communication, and tangible progress in building trust among consumers regarding companies' EV transition plans (Annex Table 40, Pg. 138).

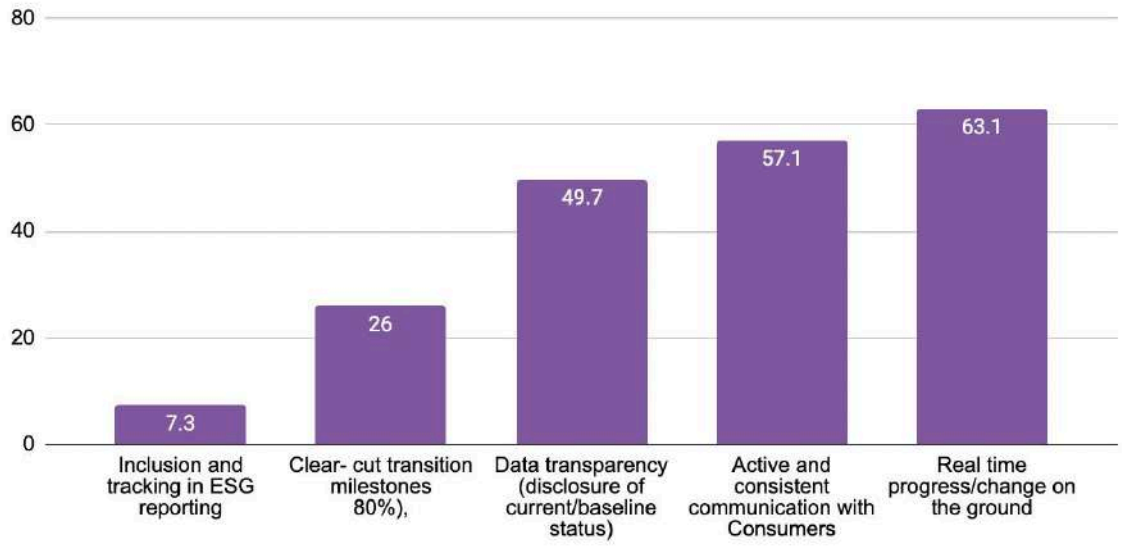


Fig 40: Percentage breakdown of respondents indicating actions or information that would bolster their trust in a company's transition plans to EVs (n=3752)

5.2.4 LIKELIHOOD OF SUPPORTING A COMPANY TRANSITIONING TO EVS

The overall trend suggests a positive inclination among respondents, with 39% (Very likely) and 41% (Likely) expressing their support to companies actively transitioning to electric vehicles in their purchasing decisions. Another 17% remained neutral in the matter and only 2% (unlikely) and 1% (very unlikely) expressed reluctance to support companies in their transition to electric vehicles. Maximum respondents who expressed that they would be very likely to support companies actively transitioning to electric vehicles were from Pune/Pimpri Chinchwad (73%) and Hubli/Dharwad (68%) (Annex Table 41, Pg. 139).

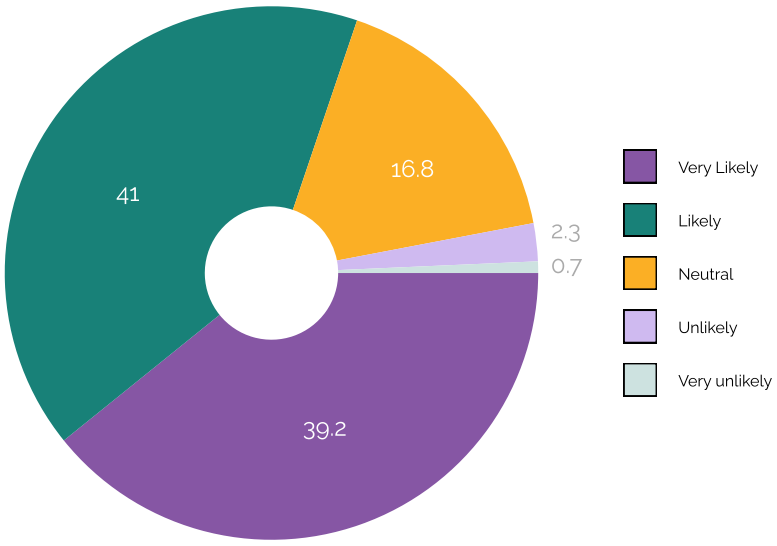


Fig 41: Percentage breakdown of respondents indicating actions or information that would bolster their trust in a company's transition plans to EVs (n=3752)

An equal proportion of males and females (39% each) mentioned that they would most likely support companies actively transitioning to electric vehicles in their purchasing decisions. In terms of age demographics, the highest level of support for companies transitioning to electric vehicles was observed among respondents aged 51 years and above, with a majority (43%) expressing their support. This was followed by the 41-50 years age group at 42%. In comparison, approximately 39% of respondents aged 18-30 years and 37% of respondents aged 31-40 years indicated similar support for this transition.

Table 23: Percentage distribution of respondents indicating likelihood of supporting a company transitioning to EVs by gender and age-group

Characteristics	Very likely	Likely	Neutral	Unlikely	Very unlikely
Gender					
Male	38.9	40.3	17.6	2.6	0.6
Female	39.4	41.8	16	2	0.7
Age Group					
18-30 years	39.1	38.4	19.1	2.6	0.9
31-40 years	36.7	45.7	15.1	2.1	0.4
41-50 years	42.2	41.5	13.4	2.2	0.7
51 years and above	42.9	42.9	12.4	1.4	0.5

Through qualitative interactions conducted across various locations, it was evident that the majority of participants in focus group discussions (FGDs) expressed support for companies transitioning to electric vehicles. This support stemmed from the desire to reduce pollution and emissions, reflecting a growing awareness and concern for environmental sustainability among the participants.

> *"Big Basket is using E-Vehicles in Chennai and I wholeheartedly support this kind of idea. I would be happy to engage with companies that use electric vehicles or sustainable products. Being part of such initiatives would make me feel like I am contributing to meaningful causes"*
> *– A Homemaker, Coimbatore*

A young male participant from Ahmedabad,pursuing a computer course stated, "I believe that if one company adopts new sustainability practices like using e-vehicles for their deliveries, it will inspire others in the industry to follow suit. This can create a positive momentum towards reducing pollution"

5.2.5 CONSIDERING PURCHASES FROM COMPANIES PROMOTING AND SUPPORTING ELECTRIC VEHICLES

A significantly high percentage (69%) of the respondents expressed that they would be more inclined to purchase products or services from a company that actively promotes and supports electric vehicles, 20% were unsure or neutral about their purchase from such companies while 11% stated that they will not be inclined to purchase from the companies promoting electric vehicles. City wise analysis revealed that Pune/Pimpri-Chinchwad (87%), Hubli-Dharwad (84%) and Kolkata (80%) had the highest proportion of respondents who stated their inclination to purchase products/ services from companies that promotes electric vehicles (Annex Table 42, Pg. 139).

As compared to other age groups, maximum respondents in the 31-40 years age group (73%) showed an inclination to purchase from the companies supporting electric vehicles while in case of other age groups, 66% to 68% stated the same.

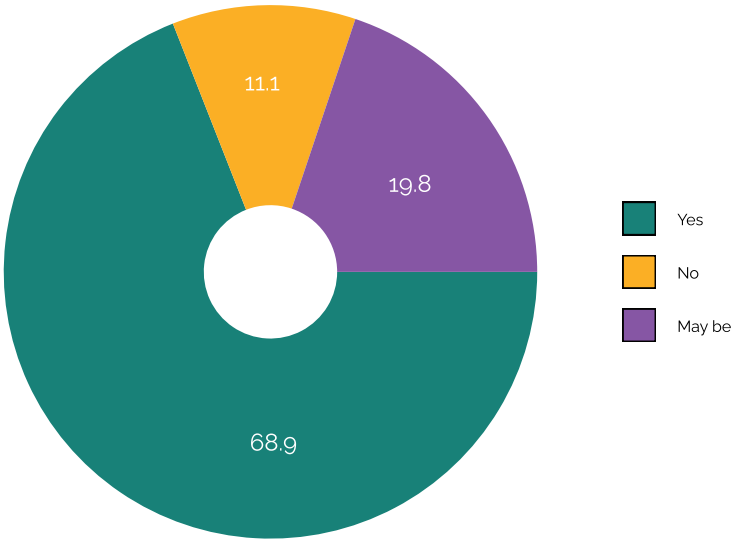


Fig 42: Percentage distribution of respondents indicating their inclination to purchase from companies supporting EVs (n=3752)

Table 24: Percentage distribution of respondents indicating their inclination to purchase from companies supporting EVs by age-group

Age Group	Very Important	Somewhat important	Not at all important
18-30 years	68.2	13.2	18.6
31-40 years	72.7	8.8	18.5
41-50 years	67.7	9.6	22.7
51 years and above	65.9	6.0	28.1

5.2.6 LIKELIHOOD OF RECOMMENDING COMPANIES TRANSITIONING TO EVS

Majority of the respondents (69%), expressed a strong inclination to recommend companies actively transitioning to electric vehicles to their friends or family. An additional 20% of respondents indicated that they might recommend such companies

while 11% were not interested in recommending them to their friends and family (Annex Table 43, Pg. 140).

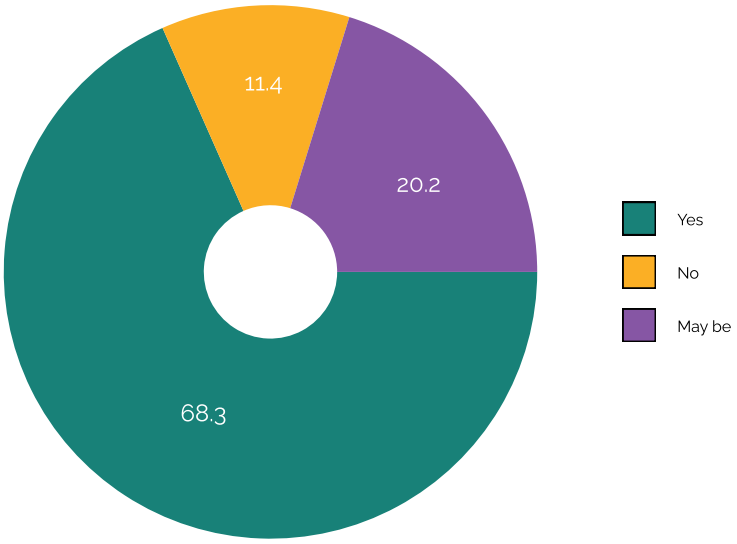


Fig 43: Distribution of respondents by their likelihood of recommending companies transitioning to EVs (n=3752)

The analysis based on age groups revealed that there was no consistent trend among respondents of different age groups in terms of their recommending companies transitioning to EVs to others.

Table 25: Distribution of respondents by their likelihood of recommending companies transitioning to EVs by age-group

Age Group	Yes	No	Maybe
18-30 years	**67.1**	**12.5**	**20.4**
31-40 years	**70.3**	**10.3**	**19.5**
41-50 years	**67.9**	**11.4**	**20.8**
51 years and above	**71.9**	**6.9**	**21.2**

5.2.7 SUGGESTIONS FOR IMPROVING COMPANY COMMUNICATION AND COMMITMENT IN TRANSITIONING TO EVS

When asked about suggestions for companies to enhance their communication and commitment regarding the transition to electric vehicles, the majority of respondents (68%) emphasized the importance of companies actively communicating their commitments. Following closely, 57% of respondents believed that companies should prioritize data transparency. Additionally, 45% of respondents suggested that companies should establish clear milestones for achieving the transition to electric vehicles. A smaller percentage, 13%, expressed that companies should actively report on the status of their transition effort (Annex Table 44, Pg. 141).

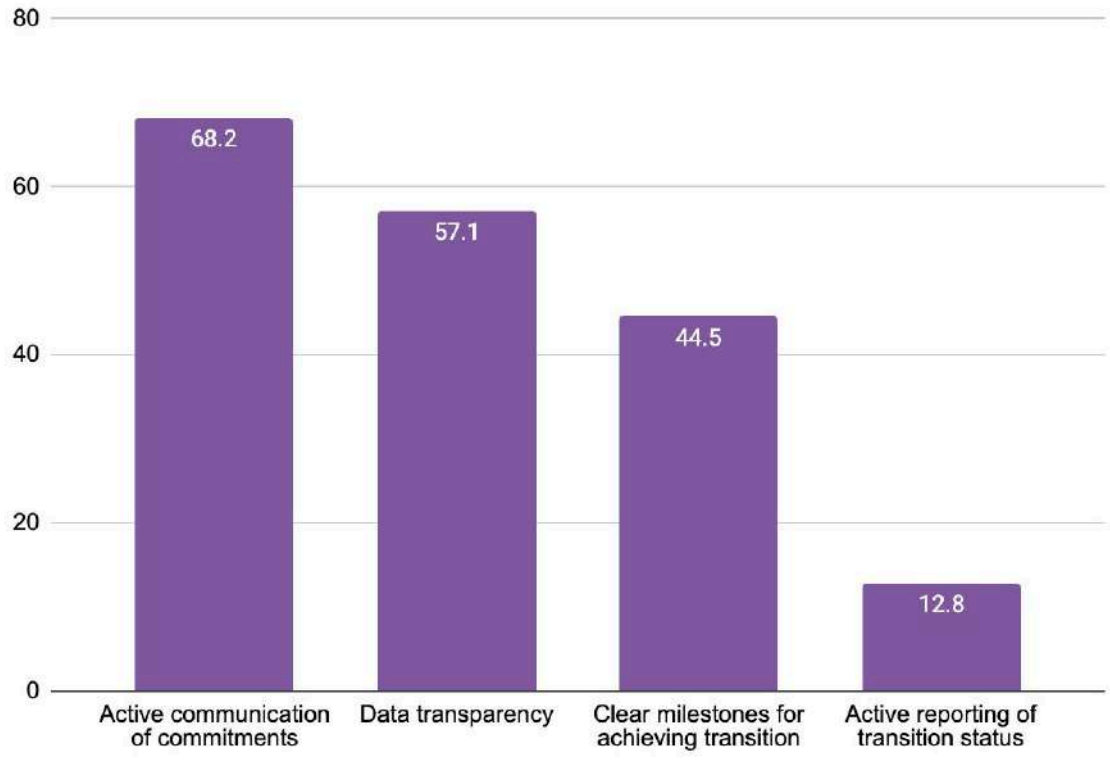


Fig 44: Distribution of respondents by their suggestions for companies to improve their communication and commitment regarding the transition to electric vehicles (n=3752) **Multiple Responses

5.3 ADHERENCE TO REGULATORY/POLICY: TRANSITION REQUIREMENT OF TIMELINES

5.3.1 IMPORTANCE OF TIMELY TRANSITION

The data suggests that, according to 65% of the respondents, it is very important for the delivery companies to adhere to the transition timelines/requirements in their state. Additionally, 33% find it somewhat important, while only 2% regard it as not important at all. City-wise analysis shows that Pune/Pimpri Chinchwad (84%), Asansol (79%) and Delhi (73%) had the highest proportion of respondents who believed that it is very important for companies to adhere to the transition timelines/requirements in their state (Annex Table 45, Pg. 141).

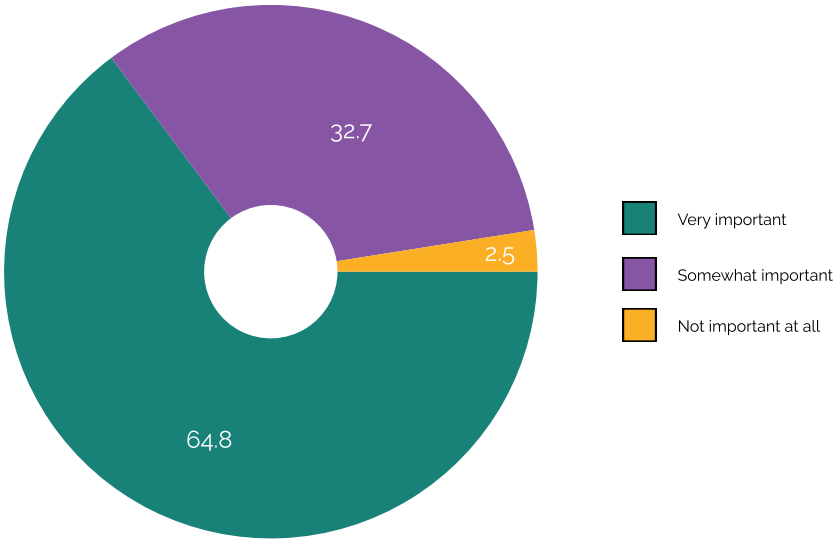


Fig 45: Percentage distribution of respondents indicating importance of adhering to transition timelines/ requirements for delivery companies (n=3752)

5.3.2 WILLINGNESS TO SWITCH BRANDS

Overall, a significant majority of respondents (66%) expressed their willingness to switch from their current brand to a competitor brand if the competitor adheres to the transition requirements of their states, and they also indicated they would recommend it to others. The highest number of respondents stating this were from Pune/Pimpri Chinchwad (86%), Hubli/Dharwad (78%), and Bangalore (77%). Additionally, 21% of respondents at the aggregate level mentioned that they might be willing to switch brands, while 13% were not willing to do so (Annex Table 46, Pg. 142).

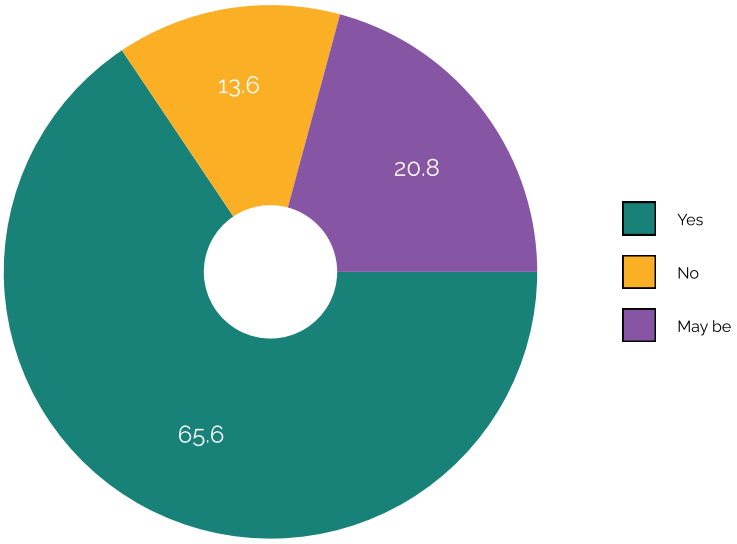


Fig 46: Percentage distribution of respondents based on their inclination to switch from their current brand to a competitor, while also advocating for them to others, aligning closely with the transition regulations mandated by the state (n=3752)

5.4 SUPPORT MECHANISMS FOR ENSURING JUST LABOUR TRANSITION

5.4.1 IMPACT OF EV TRANSITION ON WORKERS

Overall, 63% of the respondents believed that the transition to EV vehicles by companies would have an impact on drivers/partners while 16% did not think so. Around 21% expressed uncertainty, stating that maybe there could be an impact while 16% believed that there would not be any impact on the drivers/partners. City-wise analysis revealed that maximum respondents who anticipated the impact on drivers/partners were from Pune/Pimpri-Chinchwad (83%) and Hubli-Dharwad (80%) (Annex Table 47, Pg. 143).

During the focus groups, participants from Coimbatore were of the view that transitioning to electric vehicles could have an impact on the drivers. ***"Transitioning to electric vehicles may be challenging for the delivery agents, especially considering the cost implications. Many delivery agents working for companies like Swiggy and Zomato may face financial difficulties in acquiring e-vehicles due to their higher costs compared to traditional petrol or diesel vehicles.***

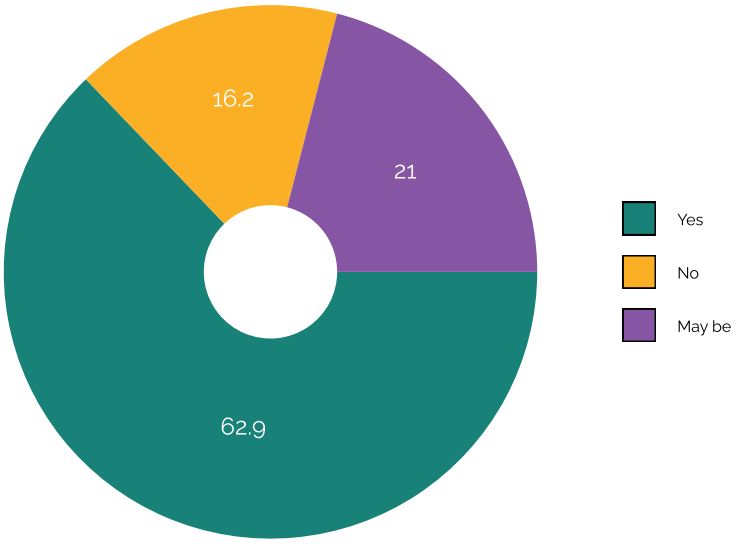


Fig 47: Percentage breakdown of respondents expressing their views on how the transition to electric vehicles (EVs) by companies would impact drivers and partners (n=3752)

Few participants mentioned that many people, who often struggle to find jobs, turn to delivery roles as a means of income. Therefore, they opined that transitioning to electric vehicles will impact them especially those who rely on second-hand vehicles for their livelihoods since the higher cost of E-Vehicles can make it financially unfeasible for these agents.

5.4.2 IMPORTANCE OF SUPPORT MECHANISMS

Slightly more than 65% respondents expressed that it is very important for companies to ensure that their driver/partners are actively supported in the EV transition process, while 33% felt that it was somewhat important. Only a mere 2% did not think it important to support drivers/partners while transitioning to EV. Maximum respondents from Pune/Pimpri Chinchwad (83%) Asansol (77%) and Delhi (73%) believed that it is very important for companies to support their drivers/partners while transitioning to EVs (Annex Table 48, Pg. 143).

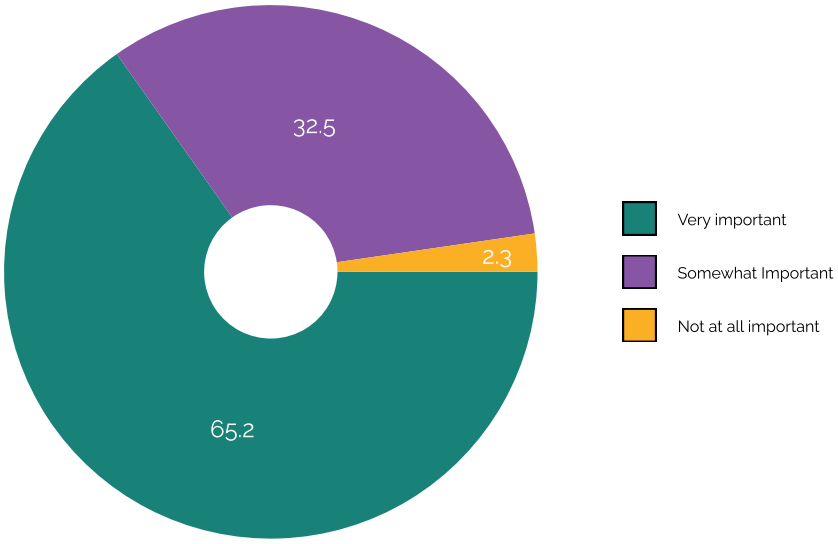


Fig 48: Percentage distribution of respondents indicating the importance of companies providing active support for their driver/partners during the transition to EVs (n=3752)

5.4.3: CONSUMER PRIORITIES FOR SUPPORTING COMPANIES

Overall, 66% of the respondents stated that they would prioritize shopping from a company which actively supports its workers in ensuring a just EV transition, with the highest number of respondents from Pune/Pimpri Chinchwad (86%) and Hubli/ Dharwad (81%) stating so. Around 22% expressed a possibility to do so, while 12% indicated that they would not prioritize shopping from a company that will support its workers in ensuring a just EV transition (Annex Table 49, Pg. 144).

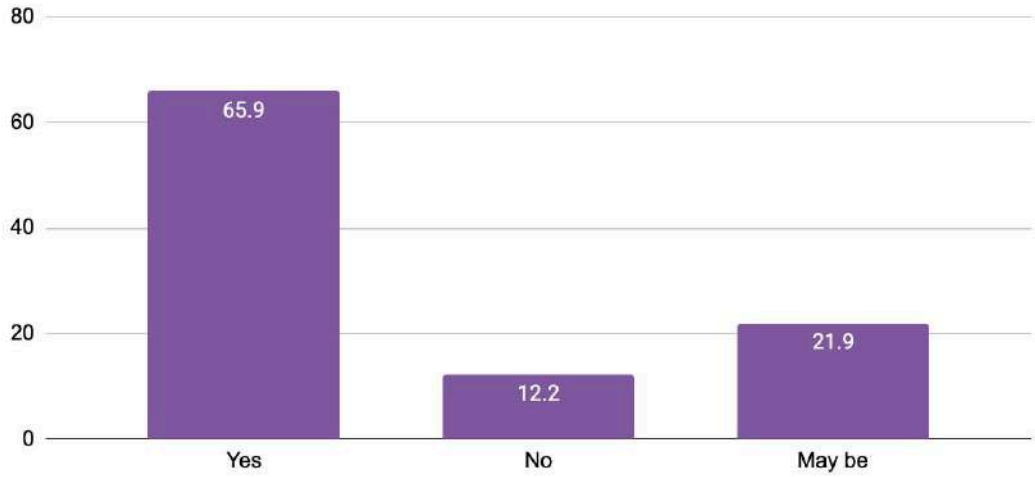


Fig 49: Percentage distribution of respondents based on whether they would prioritize shopping from a company actively supporting its workers to ensure a fair transition to EVs (n=3752)

5.5 MECHANISMS FOR ENSURING SUSTAINABLE SUPPLY CHAIN/SOURCING

5.5.1 IMPORTANCE OF SUSTAINABLE SOURCING

A significant portion (60%) of respondents were of the view that it is very important for companies to prioritize the use of sustainably mined minerals and components during the EV transition process with an additional 33% considering this aspect somewhat important. Only 3% of respondents indicated that they do not consider it important and another 4% mentioned that they were not aware of sustainably mined minerals and components. Maximum respondents from Pune/Pimpri-Chinchwad (84%) and Asansol (72%) felt it important that companies prioritize using sustainably mined minerals while transitioning to EV (Annex Table 50, Pg. 145).

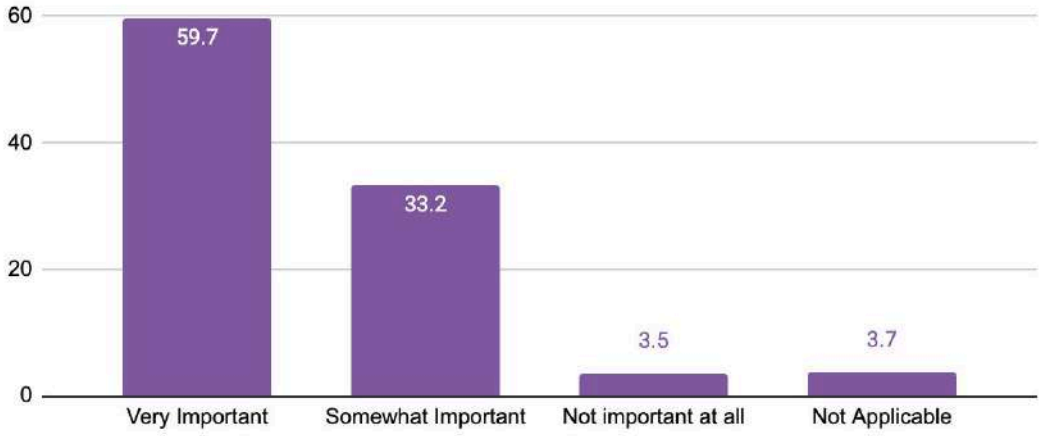


Fig 50: Distribution of respondents by their perceived importance of companies ensuring sustainably mined minerals and components in technology and vehicles adopted during the EV transition process (n=3752)

5.5.2 CONSUMER PREFERENCES FOR SUPPORTING SUSTAINABLE PRACTICES

The majority of respondents (67%) across the sample cities showed a strong preference for shopping from companies that actively support their manufacturers in ensuring sustainable sourcing of technology and components. On the other hand, 22%

of respondents were unsure about this aspect, and 11% showed no inclination towards shopping from companies that ensure sustainably mined materials. The highest proportion of respondents strongly inclined towards supporting companies with sustainable sourcing practices were from Pune/Pimpri Chinchwad (88%), Kolkata (81%), and Hubli-Dharwad (80%). These findings suggest a growing awareness and preference among consumers for companies that prioritize sustainability in their supply chain practices, particularly regarding technology and component sourcing (Annex Table 51, Pg. 145).

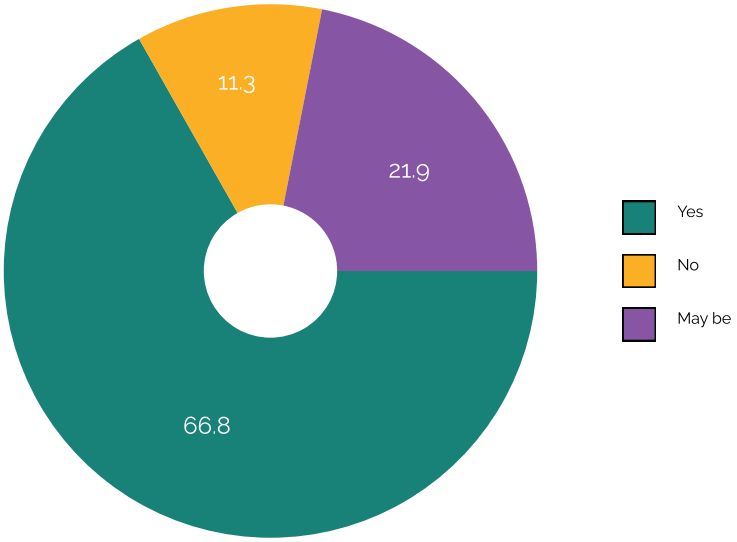


Fig 51: Percentage breakdown of respondents expressing a preference for patronizing companies that actively support their manufacturers in ensuring sustainable sourcing of technology and components (n=3752)

SECTION 6

KEY TAKEAWAYS

→ HEIGHTENED CONSUMER AWARENESS OF ENVIRONMENTAL ISSUES:

Consumers are acutely aware of pressing environmental challenges, particularly air pollution and increasing greenhouse gas emissions. They are also knowledgeable about technical aspects of these issues, reflecting a well-informed public concerned about climate change.

→ DEMAND FOR CORPORATE ACTION ON ENVIRONMENTAL CHALLENGES:

There is a strong consumer demand for companies to take decisive actions to address environmental challenges, including reducing air pollution and emissions. Consumers expect businesses to address a broad spectrum of environmental concerns proactively.

→ EXPECTATIONS FOR CORPORATE SOCIAL RESPONSIBILITY AND TRANSPARENCY:

Transparency, Transparency, Transparency:
Consumers are increasingly calling for greater transparency from companies about their environmental efforts and sustainability commitments. Clear and honest communication about initiatives, especially those involving air pollution reduction, emission control, and electric vehicle (EV) adoption, is crucial.

Perceived Gaps in Communication:
Many consumers feel that companies fall short in effectively communicating their sustainability efforts. There's a need for businesses to enhance their

communication strategies to clearly convey their environmental actions and the sustainable benefits of their products and services.

Low Trust in Corporate Claims:
To build credibility, companies must be more proactive in their communications, utilize effective channels, and provide detailed information on their environmental initiatives and sustainability efforts.

→ SUSTAINABILITY AS A KEY FACTOR IN CONSUMER CHOICES:

Brand Switching Based on Sustainability:
Consumers are increasingly willing to make purchasing decisions based on a company's sustainability practices. Businesses with strong environmental credentials can attract and retain customers who prioritize sustainability in their buying decisions.

→ SUPPORT FOR ELECTRIC VEHICLE TRANSITION:

Alignment with Consumer Preferences:
There is significant consumer support for companies that transition to electric vehicles. Embracing EV adoption can enhance a company's brand image and align with consumer expectations. Effective communication of EV transition plans is essential to gain consumer trust and backing.

Infrastructure Investment Needed:
The widespread adoption of electric vehicles requires substantial investment in EV charging infrastructure. Companies should prioritize these investments to meet consumer demand and support the EV transition.

→ REGULATORY COMPLIANCE AS A CONSUMER PRIORITY:

Adherence to Regulations:
Consumers expect companies, especially those in the last-mile delivery sector, to comply strictly with regulations regarding emissions and air pollution. Meeting regulatory requirements is crucial to maintain consumer trust and avoid penalties.

→ SUPPORT FOR JUST LABOR TRANSITION:

Worker Transition to EVs:
Ensuring a fair transition for workers in the delivery sector to electric vehicles is essential. Companies should provide support such as training programs, financial assistance, and job security measures to facilitate this shift and meet consumer expectations for social responsibility.

→ EMPHASIS ON SUSTAINABLE SOURCING:

Preference for Sustainably Sourced Materials:
Consumers expect companies to prioritize sustainable sourcing throughout their supply chains. Businesses are encouraged to adopt and communicate sustainable sourcing practices, contributing to environmental conservation and meeting consumer demands for sustainability.

These insights underscore the growing consumer expectation for companies to integrate and transparently communicate their environmental and social responsibility efforts, particularly in the context of transitioning to more sustainable practices and technologies.

ANNEXURE - 1

LOCATION-WISE TABLES

Annex Table 1: Percentage distribution of respondents by gender

Location	Male	Female	Others
Delhi	42.3	57.1	0.5
Mumbai	50	50	0
Kolkata	53.1	46.9	0
Chennai	45.7	54	0.2
Bangalore	59.9	40	0
Pune/ Pimpri-Chinchwad	50.2	49.4	0.2
Coimbatore	57.1	42.8	0
Ahmedabad	57.5	42.4	0
Hubli-Dharwad	52.4	47.3	0.2
Asansol	53.3	46.6	0
Overall	52.1	47.7	0.1

Annex Table 2: Percentage distribution of respondents by age-group

Location	18-30 years	31-40 years	41-50 years	51-60 years	61 and above years
Delhi	57.1	34.7	7.4	0.5	0.3
Mumbai	42.6	29.7	19.7	7.9	0
Kolkata	42.6	25.9	22.6	8.6	0.3
Chennai	80.9	10	5.9	3	0.3
Bangalore	57.3	33.3	6.7	2.4	0.3

Pune/ Pimpri-Chinchwad	37.9	29.2	23.7	9.2	0
Coimbatore	85.8	9.5	3.7	0.8	0.3
Ahmedabad	50.8	30.3	14.6	4.3	0
Hubli-Dharwad	39.6	30	22.5	8	0
Asansol	38.6	27.4	20.9	13.1	0
Overall	53.3	26	14.8	5.8	0.1

Annex Table 3: Percentage distribution of respondents by educational status

Location	Less than High School	High school / Secondary	Intermediate/ Sr. Secondary	Bachelor's Degree	Post-graduate Degree	Others
Delhi	7.6	7.1	30.5	41.6	12.4	0.8
Mumbai	7.9	24	21.6	38.2	8.2	0.3
Kolkata	8.6	35.9	16.7	32.9	5.9	0
Chennai	3.8	8.6	2.2	57.5	26.9	1.1
Bangalore	3	5.9	4	71	14	2.2
Pune/ Pimpri-Chinchwad	3.9	10.3	10	63.2	12.6	0
Coimbatore	2.4	6.3	2.6	64	24	0.8
Ahmedabad	14.9	31.6	23.2	21.9	8.4	0
Hubli-Dharwad	8.8	36.1	23	27.3	4.6	0.3
Asansol	9.1	34.1	21.7	30	4.8	0.3
Overall	7	19.9	15.6	44.8	12.2	0.6

Annex Table 4: Percentage distribution of respondents by occupational status

Location	Working professional	Self-employed /business	Homemker	Student	Others
Delhi	43.4	13.4	18.2	21.8	3.2
Mumbai	40	22.4	26.1	10.8	0.8
Kolkata	28	22.9	30.5	18.3	0.3
Chennai	38.2	9.1	9.1	42.5	1.1
Bangalore	69.9	10.8	7.3	11.6	0.5
Pune/ Pimpri-Chinchwad	40.3	25	15.3	8.4	11.1
Coimbatore	35.5	10.3	7.9	44.7	1.6
Ahmedabad	17.8	47.8	24.6	9.2	0.5
Hubli-Dharwad	16.8	50.3	17.1	15.2	0.5
Asansol	19.8	29	36.2	15	0
Overall	35	24	19.2	19.8	2

Annex Table 5: Percentage distribution of respondents by delivery service providers makes deliveries to their address

Delivery services	Delhi	Mumbai	Kolkata	Chennai	Bang alore	Pune/ Pimpri Chinc hwad	Coim batore	Ahme dabad	Hubli-Dhar wad	Asansol	Over all
Amazon	76.1	81.6	82.2	76.1	60.8	88.7	72.1	70.8	59.4	72.4	74
Flipkart	67.4	70.8	88.4	67.2	51.9	70.8	67.6	66.8	58	70.8	68
Zomato	54.5	44.5	52	38.7	45.7	57.9	52.4	42.7	62.3	62.5	51.3
Nykaa	24.7	9.5	4.9	12.1	10.5	15.8	12.6	12.7	15	3.8	12.2

Ajio	9.2	9.7	3.8	19.4	12.6	11.1	23.4	9.7	19.8	3.2	12.2
Snapdeal	17.6	3.4	3.8	6.7	4.3	15.8	9.2	10	10.4	3.2	8.5
Zepto	11.1	8.4	3.5	12.4	7	11.1	2.4	3.2	5.6	3.5	6.8
Swiggy Mart	8.2	2.1	1.1	6.7	11.6	13.2	7.4	4.6	4.3	2.7	6.2
Swiggy	42.4	39.7	37.7	30.1	44.1	33.4	37.6	20	11.8	26.5	32.4
BigBasket	8.7	8.2	17.5	14	10.5	18.4	8.7	9.2	3.7	7.2	10.6
Dunzo	1.8	8.2	0.5	6.2	6.2	6.6	2.1	1.1	1.9	0.8	3.5
Grofers/ Blinkit	25.8	7.6	3.8	2.7	4	4.2	0.3	2.2	1.9	1.1	5.4
JioMart	18.2	13.9	11.1	8.9	3.8	10	8.2	10.8	7	9.4	10.1
Milk Basket	1.6	0.3	0.8	1.3	0	4.2	0.5	2.2	4	0	1.5
Parcel delivery players like DHL/ BlueDart	7.6	16.6	3	8.1	3	8.2	4.7	1.4	2.1	12.3	6.7
Fedex	2.4	5.3	1.1	1.9	0.3	2.4	1.3	1.6	3.5	0	2
GATI	0.8	0.3	0.8	0.5	0.5	1.1	0.3	0.3	1.6	0	0.6
Delivery	2.1	6.1	0.8	5.1	3.2	2.1	5.8	4.3	5.9	0.5	3.6
DTDC	2.9	9.5	2.4	5.1	7.8	2.1	6.3	0.3	1.3	8	4.6
Others	34.7	10	7.5	4.6	2.7	6.1	4.7	1.6	0.3	0.5	7.3
None of the above	0.3	1.3	3.5	5.1	1.1	0	3.4	4.1	2.4	11.8	3.3

Annex Table 6: Percentage distribution by awareness about air pollution in their city

Location	Extremely	Moderately	Slightly	Not at all
Delhi	27.1	36.3	35.5	1.1
Mumbai	25.8	44.2	28.7	1.3
Kolkata	27	38.3	22.4	12.4

Chennai	49.2	40.9	7.8	2.2
Bangalore	45.7	48.7	4.6	1.1
Pune/ Pimpri-Chinchwad	73.2	20	6.6	0.3
Coimbatore	35.8	48.2	13.2	2.9
Ahmedabad	45.7	42.7	11.1	0.5
Hubli-Dharwad	25.4	31.3	41.7	1.6
Asansol	30.6	18	33.8	17.7
Overall	38.5	36.8	20.6	4.1

Annex Table 7: Distribution of respondents based on their perception of the air quality in their locality regarding its suitability for human health and environmental well-being

Location	Yes	No
Delhi	14.4	85.5
Mumbai	43.4	56.5
Kolkata	22.9	77
Chennai	47.8	52.1
Bangalore	48.1	51.8
Pune/ Pimpri-Chinchwad	49.4	50.5
Coimbatore	53.6	46.3
Ahmedabad	55.1	44.8
Hubli-Dharwad	86.9	13.1
Asansol	15.8	84.1
Overall	43.7	56.2

Annex Table 8: Respondents' perception of pollution trends in their city: Increasing, Decreasing, or Unchanged

Location	Increasing	Decreasing	Has remained the same
Delhi	77.2	12.3	10.5
Mumbai	74.4	9.8	15.8
Kolkata	89.9	1.1	9.1
Chennai	83	4.1	12.9
Bangalore	96.9	2.1	1
Pune/ Pimpri-Chinchwad	96.9	1.6	1.6
Coimbatore	80.1	8	11.9
Ahmedabad	62.1	19.3	18.7
Hubli-Dharwad	57.1	20.4	22.5
Asansol	95.5	3.2	1.3
Overall	84.1	6.9	9.1

Annex Table 9: Percentage distribution of respondents indicating their level of concern due to rise/falls in air pollution in their respective cities

Location	Very concerned	Somewhat concerned	Not concerned
Delhi	42.8	56.9	0.3
Mumbai	49.3	48.8	1.9
Kolkata	50.4	39.9	9.8
Chennai	54.1	41.8	4.1
Bangalore	65.3	33.7	1

Pune/ Pimpri-Chinchwad	73.4	26.6	0
Coimbatore	51.7	42.1	6.3
Ahmedabad	59	33.7	7.2
Hubli-Dharwad	22.5	55.1	22.5
Asansol	61.8	36	2.2
Overall	54.7	41.3	4

Annex Table 10: Percentage distribution of respondents by their awareness and understanding of the AQI relevance

Location	Aware and understand	Aware but don't understand	Not aware and don't understand
Delhi	44	46.3	9.7
Mumbai	31.3	46.6	22.1
Kolkata	21.8	51.2	27
Chennai	54	32.8	13.2
Bangalore	37.1	55.1	7.8
Pune/ Pimpri-Chinchwad	73.4	22.9	3.7
Coimbatore	42.1	42.4	15.5
Ahmedabad	41.4	48.9	9.7
Hubli-Dharwad	35.8	58	6.2

Asansol	15.6	29.5	55
Overall	39.7	43.3	17

Annex Table 11: Distribution of respondents' awareness of the current AQI level in their respective areas

Location	Aware (%)	Unaware (%)
Delhi	50.3	49.7
Mumbai	36.3	63.7
Kolkata	17.3	82.8
Chennai	52.4	47.6
Bangalore	54.3	45.7
Pune/ Pimpri-Chinchwad	76.1	24
Coimbatore	50.5	49.5
Ahmedabad	72.2	27.8
Hubli-Dharwad	56.4	43.6
Asansol	5.4	94.6
Overall	47.2	52.9

Annex Table 12: Percentage distribution of respondents reporting the effects of air pollution

Air pollution	Delhi	Mumbai	Kolkata	Chennai	Bangalore	Pune/ Pimpri-Chinchwad	Coimbatore	Ahmedabad	Hubli-Dharwad	Asansol	Total
Irritation to eyes/nose/ throat	77.6	52.9	53.6	47	25.5	51.6	40.3	41.4	66.3	59	51.6
Skin issues	64.7	42.1	38.3	54.6	53.8	76.8	46.3	51.1	51.6	49.1	52.9
Decreased outdoor activities	32.4	27.9	22.1	25	30.1	34.5	33.9	36.2	54.3	20.4	31.7
Breathlessness	71.3	44.7	71.4	34.1	28.8	50.5	28.9	32.7	25.1	80.4	46.8
Poor visibility	39.2	24.7	45.8	19.6	18.8	42.6	17.6	23	21.7	23.6	27.7
Concern about adverse impact on child health	33.9	37.4	51.2	19.6	9.1	42.6	14.5	24.1	28.9	54.2	31.6
Respiratory ailments like asthma	54.2	42.6	54.2	22.6	9.7	44.5	17.4	13	12.8	52.5	32.4
Increased monetary spending	14.2	25	25.3	9.4	6.5	29.2	12.4	21.1	5.9	20.1	16.9
Loss of productivity	13.2	19.5	8.9	11	11.6	22.4	13.9	21.1	6.4	25.7	15.4

Desire to shift to a lesser polluted place	9.7	25.3	18.3	12.9	10.2	31.6	15.8	13	7.8	13.9	15.9
Travel disruption due to flight delays, slow traffic	10.5	28.4	9.2	9.9	12.1	22.4	11.3	11.4	9.4	9.1	13.4
More frequent doctor/ hospital visits	8.2	37.9	28.6	9.9	4	22.1	9.7	17.8	15.5	51.5	20.5
Others (specify)	0.8	0.5	0	0.5	0	0.3	0.5	0.5	0	0	0.3
None of the above	0.5	1.1	9.7	5.9	3.2	0.3	8.9	0.5	10.2	0	4

Annex Table 13: Percentage distribution of respondents based on actions taken to mitigate exposure to poor air quality

Location	Use air purifiers	Limit outdoor activities on poor air quality days	Use masks	Drive less or use alternative transportation	Contribute to local air quality improvement initiatives	Others
Delhi	25	32.4	87.4	45	21.8	2.9
Mumbai	29.5	40.5	68.7	38.4	24.2	0.3

Kolkata	8.1	16.2	37.7	14.6	13.2	0
Chennai	22.8	28.5	64.2	31.5	16.1	0.5
Bangalore	19.6	30.1	81.5	25.5	13.2	0
Pune/Pimpri-Chinchwad	29.2	45.5	81.6	52.6	18.4	0.5
Coimbatore	24.2	32.9	66.3	32.1	15.3	0.5
Ahmedabad	47.3	38.4	51.9	33	17.3	0
Hubli-Dharwad	54	43.9	56.1	34.8	42.8	0
Asansol	4.3	37.5	60.6	31.1	37.8	0
Overall	26.4	34.6	65.8	33.9	22	0.5

Annex Table 14: Percentage distribution of respondents by their familiarity with the concept of corporate/business responsibility for reducing air pollution and improving air quality

Location	Very familiar	Somewhat familiar	Not familiar at all
Delhi	30.5	61.6	7.9
Mumbai	32.6	49.7	17.6
Kolkata	14.8	53.1	32.1
Chennai	40.9	43.8	15.3
Bangalore	35.8	57.8	6.5
Pune/Pimpri-Chinchwad	74.7	23.7	1.6
Coimbatore	38.7	44	17.4

Ahmedabad	60.5	38.1	1.4
Hubli-Dharwad	34.5	58.3	7.2
Asansol	19.3	45	35.7
Overall	38.3	47.5	14.2

Annex Table 15: Distribution of respondents by their preferred source of information

Location	Product labels/ packaging	Company website	Company Annual Reports	Social media	News articles	Word of mouth	Others
Delhi	25	39.7	10.5	77.6	45.8	36.1	2.6
Mumbai	38.7	30.3	19.7	60.5	62.4	51.3	2.9
Kolkata	44.7	28	20.2	76.8	41.2	76.3	0
Chennai	32.3	28	15.3	59.1	39.8	24.7	0.8
Bangalore	22.3	33.3	16.4	68.8	40.6	12.1	0
Pune/Pimpri-Chinchwad	30.8	45.3	31.6	69.5	34.2	31.6	0
Coimbatore	16.6	24.5	22.1	65.8	42.9	25	0.3
Ahmedabad	26.5	21.1	24.1	63.2	33	32.4	0
Hubli-Dharwad	39.8	22.7	27.5	67.1	57	40.6	0
Asansol	49.3	19.6	12.6	80.4	34.6	79.9	4.6
Overall	32.6	29.3	20	68.9	43.2	41	1.1

Annex Table 16: Distribution of respondents by their preference for source of receiving information about a company's actions for air pollution

Location	Workshops or seminars	Online articles	Social media campaigns	Mobile apps	Infographics and visual materials	Others
Delhi	33.2	50.3	74.2	44.2	30.3	1.8
Mumbai	29.2	43.4	65.5	42.4	29.5	9.5
Kolkata	39.4	39.9	79.2	50.4	34.8	0
Chennai	27.7	43	53.8	49.2	18.3	0.3
Bangalore	27.6	63.9	62.8	27	6	0
Pune/Pimpri-Chinchwad	28.4	52.9	73.4	58.4	13.9	0.5
Coimbatore	25.3	50	58.2	36.8	14.7	1.1
Ahmedabad	36.8	32.7	45.4	48.6	13.2	0
Hubli-Dharwad	37.2	31.3	60.4	68.4	24.1	0
Asansol	48.8	34.6	71.6	46.9	44.2	4.3
Overall	33.2	43.9	64.2	47.1	22.9	1.8

Annex Table 17: Distribution of respondents' perceptions on the effectiveness of companies' communication regarding air pollution reduction efforts

Location	Very effectively	Somewhat effectively	Not effectively at all
Delhi	24.7	68.2	7.1
Mumbai	22.4	64.2	13.4

Kolkata	37.2	56.1	6.7
Chennai	37.4	48.7	14
Bangalore	28	65.9	6.2
Pune/Pimpri-Chinchwad	76.3	20	3.7
Coimbatore	30.3	57.4	12.4
Ahmedabad	49.7	41.9	8.4
Hubli-Dharwad	34.8	60.4	4.8
Asansol	33.2	64.1	2.7
Overall	37.4	54.7	7.9

Annex Table 18: Distribution of respondents by likelihood to share information

Location	Very likely	Somewhat likely	Not likely
Delhi	54.2	43.2	2.6
Mumbai	40	53.7	6.3
Kolkata	52.8	44.5	2.7
Chennai	47	44.1	8.9
Bangalore	45.7	53	1.3
Pune/Pimpri-Chinchwad	72.9	25	2.1
Coimbatore	36.8	52.6	10.5
Ahmedabad	43.2	44.6	12.2

Hubli-Dharwad	61.5	34	4.6
Asansol	54.4	45	0.5
Overall	50.9	44	5.2

Annex Table 19: Distribution of respondents by importance of a Company's Commitment to reducing air pollution (AQI Reduction) in their purchasing decision

Location	Very important	Somewhat important	Not important at all
Delhi	37.9	54.5	7.6
Mumbai	57.1	41.3	1.6
Kolkata	59.8	39.1	1.1
Chennai	66.1	30.9	3
Bangalore	58.9	40.9	0.3
Pune/Pimpri-Chinchwad	81.6	17.4	1.1
Coimbatore	51.3	43.4	5.3
Ahmedabad	64.3	32.4	3.2
Hubli-Dharwad	43.1	51.6	5.4
Asansol	41.8	54.4	3.8
Overall	56.2	40.6	3.2

Annex Table 20: Distribution of respondents by importance of a Company's Commitment to reducing air pollution (AQI Reduction) in their purchasing decision

Location	Yes	No
Delhi	57.6	42.4
Mumbai	55.8	44.2
Kolkata	31.5	68.5
Chennai	68	32
Bangalore	72.3	27.7
Pune/Pimpri-Chinchwad	87.1	12.9
Coimbatore	62.6	37.4
Ahmedabad	73.2	26.8
Hubli-Dharwad	57.2	42.8
Asansol	22.3	77.8
Overall	58.8	41.2

Annex Table 21: Distribution of respondents by most impactful environmental initiatives on purchase decision

Location	Publicized commitment to environmental responsibilities	Use of eco-friendly production methods	Adoption of sustainable and renewable resources	Implementation of green technologies in operations	Transparent reporting on environmental impact	Others
Delhi	68.4	77.4	42.9	51.8	12.1	0
Mumbai	57.6	70.3	58.9	62.6	34.5	0.3

Kolkata	70.1	62.3	60.1	70.6	40.2	0
Chennai	46.8	65.3	43	35.5	26.9	0.3
Bangalore	30.1	71.8	29.8	34.9	13.7	0
Pune/ Pimpri-Chinchwad	53.2	77.4	53.2	42.6	18.4	0.3
Coimbatore	30.8	71.8	40	33.9	22.1	0.3
Ahmedabad	43.5	60.3	36.8	31.9	14.1	0.3
Hubli-Dharwad	73.8	61	39.6	31.6	28.6	0
Asansol	56.3	80.7	62.2	73.5	44.5	0
Overall	53.1	69.9	46.7	46.9	25.5	0.1

Annex Table 22: Percentage Distribution of Respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to reducing air pollution (AQI reduction)

Location	Yes	No	Maybe
Delhi	65	5.8	29.2
Mumbai	52.4	13.2	34.5
Kolkata	49.3	20.5	30.2
Chennai	65.6	18.6	15.9
Bangalore	81.2	7	11.8

Pune/Pimpri-Chinchwad	86.3	4	9.7
Coimbatore	62.6	17.9	19.5
Ahmedabad	56.2	27.6	16.2
Hubli-Dharwad	72.2	11	16.8
Asansol	37.8	9.1	53.1
Overall	62.9	13.4	23.7

*Base (N): 3752

Analysis by gender unveiled that male respondents (71%) were more likely to switch from their current brands to a competitor brand as compared to females (60%). All respondents aged 50 years and above were ready to switch brands if a competitor brand commits to reduce air pollution, while 65-67% of respondents in the age groups of 18-40 years expressed their willingness to do so. However, only 43% of respondents in the 41-50 years age group stated the same readiness to switch brands.

Annex Table 23: Percentage distribution of respondents by their likelihood to recommend brand based on its air quality improvement (AQI reduction) initiatives

Location	Yes	No	Maybe
Delhi	54.7	42.6	2.6
Mumbai	45.3	51.6	3.2
Kolkata	55.8	41.5	2.7
Chennai	51.9	40.6	7.5
Bangalore	45.2	52.7	2.2
Pune/Pimpri-Chinchwad	72.6	25.5	1.8
Coimbatore	36.6	50	13.4

Ahmedabad	38.1	44.9	17
Hubli-Dharwad	65.5	28.9	5.6
Asansol	56.3	43.4	0.3
Overall	52.2	42.2	5.6

Annex Table 24: Percentage distribution of respondents by their familiarity with the concept of corporate/business responsibility for reducing emissions and combating climate change

Location	Very familiar	Somewhat familiar	Not familiar at all
Delhi	28.4	55	16.6
Mumbai	29.5	52.1	18.4
Kolkata	25.9	54.7	19.4
Chennai	43.8	46.2	10
Bangalore	37.9	59.4	2.7
Pune/Pimpri-Chinchwad	76.8	19	4.2
Coimbatore	41.3	48.7	10
Ahmedabad	63.8	33	3.2
Hubli-Dharwad	33.2	59.6	7.2
Asansol	22.3	48.5	29.2
Overall	40.3	47.6	12.1

Annex Table 25: Distribution of respondents by importance of a Company's Commitment to reducing carbon emission reduction in their purchasing decision

Location	Very important	Somewhat important	Not important at all
Delhi	31.3	56.6	12.1
Mumbai	43.4	53.7	2.9

Kolkata	50.4	46.4	3.2
Chennai	53.8	40.9	5.4
Bangalore	46.2	51.9	1.9
Pune/Pimpri-Chinchwad	75	22.9	2.1
Coimbatore	42.1	46.3	11.6
Ahmedabad	40	46.2	13.8
Hubli-Dharwad	40.4	52.7	7
Asansol	34.9	60.6	4.6
Overall	45.8	47.8	6.5

Annex Table 26: Distribution of respondents (consumers) preferences for products or services based on company's commitment to strong climate action and emission reduction

Location	Yes	No
Delhi	39.5	60.5
Mumbai	55.3	44.7
Kolkata	31	69
Chennai	68.6	31.5
Bangalore	75.3	24.7
Pune/Pimpri-Chinchwad	86.6	13.4
Coimbatore	64	36.1
Ahmedabad	76.2	23.8
Hubli-Dharwad	59.1	40.9
Asansol	25.5	74.5
Overall	58.1	41.9

Annex Table 27: Percentage breakdown of respondents indicating factors related to climate action and emission reduction as influential in their decision to purchase from a specific company

Location	Publicized commitment to environmental responsibility	Use of renewable energy sources in operations	Adoption of energy-efficient production methods	Implementation of sustainable supply chain practices	Transparent reporting on carbon footprint	Others
Delhi	69.5	77.6	51.1	30.8	10.3	0.3
Mumbai	52.9	68.4	62.4	51.3	26.8	0.3
Kolkata	74.7	71.7	65.5	48.5	30.2	0
Chennai	52.2	58.9	40.1	35.2	24.7	0.3
Bangalore	33.9	68.3	28.8	23.4	16.7	0.3
Pune/ Pimpri-Chinchwad	64.5	67.4	60	44.2	15.5	0
Coimbatore	36.3	67.6	43.2	32.9	19.2	0.3
Ahmedabad	43.5	52.4	39.7	31.6	11.9	0.3
Hubli-Dharwad	75.7	65.5	38	27	23.3	0
Asansol	58.7	70	60.9	54.2	26.5	0
Overall	56.2	66.8	49	37.9	20.5	0.1

Annex Table 28: Distribution of respondents by sources for learning about companies' climate action and emission reduction initiatives

Location	Product labels/ packaging	Company website	Social media	News articles	Word of mouth	Others
Delhi	25	41.1	78.2	51.3	36.3	1.6

Mumbai	38.9	35	71.5	74.5	65.3	2.8
Kolkata	53.9	35.1	98.1	57.5	88.6	0
Chennai	34.4	29.6	64.2	46.5	28	0.8
Bangalore	25.3	29.6	70.7	44.1	9.7	0
Pune/Pimpri-Chinchwad	38.9	50.3	66.1	44.2	30.3	0
Coimbatore	19.7	36.8	71.3	41.8	27.6	0.5
Ahmedabad	26.5	27	67.8	38.4	24.1	0
Hubli-Dharwad	38	29.7	72.5	59.1	39.3	0
Asansol	51.7	19.3	82.3	34.9	80.7	2.9
Overall	34.3	32.3	71.6	47.2	40.5	0.8

Annex Table 29: Distribution of respondents based on their perceptions of companies' effectiveness in communicating climate change mitigation and emission reduction via their products and services

Location	Very Effectively	Somewhat effectively	Not effectively at all
Delhi	32.1	62.6	5.3
Mumbai	27.1	64.5	8.4
Kolkata	42.9	54.5	2.7
Chennai	46	46.8	7.3
Bangalore	42.5	56.2	1.3
Pune/Pimpri-Chinchwad	81.8	16.6	1.6
Coimbatore	40.8	46.6	12.6
Ahmedabad	56.5	36	7.6
Hubli-Dharwad	41.2	54.3	4.6
Asansol	37	60.1	3
Overall	44.8	49.8	5.4

Annex Table 30: Percentage Distribution of Respondents based on their willingness to transition from their current brand to a competitor with a stronger dedication to emission reduction

Location	Yes	No	Maybe
Delhi	69.5	5.3	25.3
Mumbai	55	15	30
Kolkata	61.5	16.7	21.8
Chennai	66.7	19.4	14
Bangalore	80.1	7.5	12.4
Pune/Pimpri-Chinchwad	85.5	4.2	10.3
Coimbatore	64.7	20.5	14.7
Ahmedabad	63	27.6	9.5
Hubli-Dharwad	74.6	9.4	16
Asansol	34.9	10.5	54.7
Overall	65.5	13.6	20.9

Annex Table 31: Percentage distribution of respondents by their likelihood to recommend brand based on its emission reduction initiatives

Location	Very likely	Somewhat likely	Not likely at all
Delhi	52.6	44.5	2.9
Mumbai	42.4	52.1	5.5
Kolkata	57.4	41	1.6
Chennai	46.2	44.4	9.4
Bangalore	44.9	53.8	1.3

Pune/Pimpri-Chinchwad	75.8	22.4	1.8
Coimbatore	37.1	51.3	11.6
Chennai	46.2	44.4	9.4
Ahmedabad	38.4	42.4	19.2
Hubli-Dharwad	57	36.1	7
Asansol	49.6	49.3	1.1
Overall	50.2	43.7	6.1

Annex Table 32: Distribution of respondents by their awareness of ESG Reporting and source of information

Location	Yes	No
Delhi	50.3	49.7
Mumbai	52.9	47.1
Kolkata	41.8	58.2
Chennai	71.8	28.2
Bangalore	71.5	28.5
Pune/Pimpri-Chinchwad	85.5	14.5
Coimbatore	65.8	34.2
Ahmedabad	84.3	15.7
Hubli-Dharwad	51.3	48.7
Asansol	13.7	86.3
Overall	58.9	41.1

Annex Table 33: Distribution of respondents by source of information regarding ESG reporting by companies

Location	Media-Print	Media-Online	Company websites	Social media-Facebook/X/ threads posts	Social media-Instagram /facebook reels, youtube shorts & vlogs	Social media-Linkedin posts	TV/ Radio	Word of mouth	Whatsapp	Mobile apps of the company	Others
Delhi	7.9	0	0.5	12	10.5	8.9	26.2	9.4	15.7	8.9	0
Mumbai	14.4	0.5	0	14.9	17.9	3.4	5	4	14.9	12.4	2.5
Kolkata	12.9	2.6	0	16.1	7.1	5.8	25.2	3.2	15.5	9.7	1.9
Chennai	19.1	6.7	0	16.1	10.9	12.7	18.7	1.9	7.1	3.4	3.4
Bangalore	12.8	7.1	0	38.7	13.5	6.8	7.1	3.4	2.6	4.1	3.8
Pune/ Pimpri-Chinchwad	33.9	0	0	22.2	10.5	7.1	11.7	3.1	8.9	2.2	0.6
Coimbatore	8.4	1.6	0.8	14.8	20	15.6	22.8	2.4	5.2	2.8	5.6
Ahmedabad	3.2	0.3	0.3	10.3	14.1	20.2	18.9	5.1	13.1	10.3	4.2
Hubli-Dharwad	7.8	3.1	0	4.7	14.6	12.5	14.6	5.7	12.5	21.4	3.1
Asansol	31.4	0	0	9.8	17.7	7.8	15.7	3.9	9.8	2	2
Overall	14.5	2.4	0.2	17.2	13.4	11.7	16.2	4.1	10.1	7.5	2.9

Annex Table 34: Respondents' perceived ease of understanding company reporting across various areas

Location	Very easy	Somewhat easy	Cannot comprehend
Delhi	35.7	42.9	21.4
Mumbai	30	60	10
Kolkata	42.9	42.9	14.3
Chennai	36.5	51.2	12.3
Bangalore	27	68.4	4.6
Pune/Pimpri-Chinchwad	20	60	20
Coimbatore	29.1	55.6	15.3
Ahmedabad	0	100	0
Hubli-Dharwad	11.1	88.9	0
Asansol	0	0	0
Overall	30.8	58.7	10.5

Annex Table 35: Percentage distribution of respondents by their perception on the importance of companies utilizing EVs in their operations

Location	Very important	Somewhat important	Not important at all
Delhi	60.5	37.9	1.6
Mumbai	56.3	42.6	1.1
Kolkata	70.6	29.4	0
Chennai	63.7	32.5	3.8

Bangalore	54.8	43.3	1.9
Pune/Pimpri-Chinchwad	83.4	15.5	1.1
Coimbatore	64.7	29.5	5.8
Ahmedabad	67.3	29.7	3
Hubli-Dharwad	50.8	43.1	6.2
Asansol	78	21.2	0.8
Overall	65	32.5	2.5

Annex Table 36: Percentage distribution of respondents based on receipt of information from companies regarding their EV transition plans and medium of information receipt

Location	Yes	No
Delhi	39	61.1
Mumbai	44.7	55.3
Kolkata	16.4	83.6
Chennai	52.4	47.6
Bangalore	60	40.1
Pune/Pimpri-Chinchwad	81.8	18.2
Coimbatore	57.9	42.1
Ahmedabad	70	30
Hubli-Dharwad	24.9	75.1
Asansol	11.3	88.7
Overall	45.9	54.1

Annex Table 37: Distribution of respondents by source of information from companies about their EV transition plans

Location	Media-Print	Media-Online	Company websites	Social media-Facebook/X/threads posts	Social media-Instagram/facebook reels, youtube shorts & vlogs	Social media-Linked-in posts	TV/Radio	Word of mouth	Whatsapp	Mobile apps of the company	Others
Delhi	22.3	21.9	19.5	26.6	32	18.8	23.8	21.9	1.2	0.8	1.6
Mumbai	38.2	37.6	32.9	35.9	44.7	27.1	35.9	50.6	14.1	7.6	0
Kolkata	42.6	24.6	27.9	26.2	45.9	24.6	50.8	55.7	36.1	11.5	0
Chennai	28.7	42.6	25.6	20	29.2	19	14.9	16.4	12.8	16.4	0
Bangalore	15.7	61	14.3	6.3	19.7	8.1	10.3	12.6	7.6	13	0
Pune/ Pimpri-Chinchwad	26	51.8	35.7	37.6	48.6	21.2	42.1	28.9	18	6.4	0
Coimbatore	15.9	45.9	28.6	20.9	37.3	15	25.5	19.5	17.7	5.5	0.5
Ahmedabad	17.8	27.8	26.6	28.2	34	13.1	23.6	34.4	21.2	2.7	0.8
Hubli-Dharwad	22.6	17.2	11.8	18.3	51.6	30.1	32.3	55.9	21.5	8.6	2.2
Asansol	31	47.6	47.6	76.2	66.7	47.6	33.3	40.5	26.2	26.2	0
Overall	23.9	42	27.8	28	39.7	20	28.9	30.6	15.8	8.2	0.4

Annex Table 38: Distribution of respondents indicating factors influencing their perception of companies

Location	Use of renewable energy sources in operations	Investment in EV charging infrastructure	Transparent reporting on Environmental impact	Other (please specify)
Delhi	72.4	81.8	43.9	0.3
Mumbai	72.4	75	49.7	0.3
Kolkata	83.6	62	70.9	0
Chennai	66.1	55.4	38.7	1.1
Bangalore	53.8	53	35.5	0
Pune/Pimpri-Chinchwad	63.2	83.4	37.1	0
Coimbatore	57.6	58.4	35.8	0.5
Ahmedabad	61.6	56.5	32.7	0
Hubli-Dharwad	72.7	70.9	45.2	0.5
Asansol	75.9	88.5	68.6	0
Overall	67.9	68.6	45.8	0.3

Annex Table 39: Percentage distribution of respondents by their trust on companies' claims and commitments regarding their transition to electric vehicles

Location	Completely trust	Somewhat trust	Neutral	Somewhat distrust	Completely distrust
Delhi	11.6	62.1	24.2	1.8	0.3
Mumbai	19	44.7	34.2	1.8	0.3
Kolkata	37.7	49.3	11.3	1.4	0.3
Chennai	32	30.4	32.5	3.8	1.3
Bangalore	19.6	54.6	19.9	4.6	1.3

Pune/Pimpri-Chinchwad	66.6	24.2	7.9	1.3	0
Coimbatore	16.6	41.6	31.1	7.1	3.7
Ahmedabad	28.9	36.5	24.3	9.2	1.1
Hubli-Dharwad	51.6	30.8	7.8	9.1	0.8
Asansol	18	74.3	7.2	0.5	0
Overall	30.1	44.8	20.1	4.1	0.9

Annex Table 40: Percentage breakdown of respondents indicating actions or information that would bolster their trust in a company's transition plans to EVs

Location	Active and consistent communication with Consumers	Real time progress/ change on the ground	Data transparency (disclosure of current/ baseline status)	Clear- cut transition milestones 80%),	Inclusion and tracking in ESG reporting
Delhi	56.3	82.1	62.6	27.4	3.2
Mumbai	60.3	61.1	53.9	45.8	13.7
Kolkata	76.5	74.7	61.2	34.8	10.2
Chennai	46.4	47.5	35.1	17.2	8
Bangalore	37.3	56.3	43.4	11	4
Pune/ Pimpri-Chinchwad	66.1	75	54.5	15.3	6.3
Coimbatore	43.2	51.8	41.8	17.4	7.6
Ahmedabad	33.8	57.8	46.8	16.8	6.5
Hubli-Dharwad	79.7	46.3	34.8	38.2	11.2
Asansol	71.3	78	62.7	36.2	1.9

Overall	57.1	63.1	49.7	26	7.3

Annex Table 41: Percentage distribution of respondents indicating likelihood of supporting a company transitioning to EVs

Location	Very Likely	Likely	Neutral	Unlikely	Very unlikely
Delhi	28.2	57.1	13.2	1.3	0.3
Mumbai	31.6	36.8	31.3	0.3	0
Kolkata	41.8	52.3	5.7	0.3	0
Chennai	40.6	27.4	26.9	4	1.1
Bangalore	28.2	52.2	18.6	1.1	0
Pune/Pimpri-Chinchwad	73.4	21.6	4.2	0.8	0
Coimbatore	28.4	35.8	27.4	6.1	2.4
Ahmedabad	31.1	34.6	28.1	5.1	1.1
Hubli-Dharwad	67.7	17.1	9.4	3.7	2.1
Asansol	20.6	75.6	3.5	0.3	0
Overall	39.2	41	16.8	2.3	0.7

Annex Table 42: Percentage distribution of respondents indicating their inclination to purchase from companies supporting EVs

Location	Yes	No	May be
Delhi	70.8	9.5	19.7
Mumbai	59.7	6.8	33.4
Kolkata	80.3	2.2	17.5

Chennai	60.5	19.9	19.6
Bangalore	78.8	8.1	13.2
Pune/Pimpri-Chinchwad	86.6	4.2	9.2
Coimbatore	59.5	22.4	18.2
Ahmedabad	61.1	20.3	18.7
Hubli-Dharwad	83.7	8.6	7.8
Asansol	50.7	9.1	40.2
Overall	68.9	11.1	19.8

Annex Table 43: Distribution of respondents by their likelihood of recommending companies transitioning to EVs

Location	Yes	No	May be
Delhi	70.5	9.2	20.3
Mumbai	58.4	7.9	33.7
Kolkata	72	6.5	21.6
Chennai	59.4	19.9	20.7
Bangalore	77.4	6.5	16.1
Pune/Pimpri-Chinchwad	86.6	6.1	7.4
Coimbatore	57.9	20.3	21.8
Ahmedabad	54.3	21.1	24.6
Hubli-Dharwad	82.6	7	10.4
Asansol	64.1	10.2	25.7
Overall	68.3	11.4	20.2

Annex Table 44: Distribution of respondents by their suggestions for companies to improve their communication and commitment regarding the transition to electric vehicles

Recommend	Delhi	Mumbai	Kolkata	Chennai	Bangalore	Pune/ Pimpri-Chinchwad	Coimbatore	Ahmedabad	Hubli-Dharwad	Asansol	Total
Active communicat-ion of commitments	72.1	72.1	83	56.7	53	79.2	59.5	55.9	78.1	72.4	68.2
Data transparency	72.9	48.4	63.9	48.7	62.9	71.8	46.3	52.4	23.5	80.4	57.1
Clear milestones for achieving transition	52.6	58.4	55.8	29.3	22.3	43.2	29.5	37	59.4	57.6	44.5
Active reporting of transition status	7.4	21.6	18.6	15.6	6.7	7.4	13.7	6.2	20.1	10.7	12.8

Annex Table 45: Percentage distribution of respondents indicating importance of adhering to transition timelines/requirements for delivery companies

Location	Very important	Somewhat important	Not important at all
Delhi	73.4	25.8	0.8
Mumbai	63.7	34.2	2.1
Kolkata	71.7	28	0.3

Chennai	68.6	29.6	1.9
Bangalore	61.6	36.8	1.6
Pune/Pimpri-Chinchwad	84.2	15.8	0
Coimbatore	61.1	32.9	6.1
Ahmedabad	56.5	39.2	4.3
Hubli-Dharwad	27.8	64.7	7.5
Asansol	79.4	20.1	0.5
Overall	64.8	32.7	2.5

Annex Table 46: Percentage distribution of respondents based on their inclination to switch from their current brand to a competitor, while also advocating for them to others, aligning closely with the transition regulations mandated by the state

Location	Yes	No	May be
Delhi	68.4	6.1	25.5
Mumbai	51.3	9.2	39.5
Kolkata	72	11.1	17
Chennai	53	24.5	22.6
Bangalore	76.6	6.7	16.7
Pune/Pimpri-Chinchwad	86.3	4.5	9.2
Coimbatore	55	24	21.1
Ahmedabad	50.3	26.8	23
Hubli-Dharwad	77.5	12.8	9.6
Asansol	65.4	10.7	23.9
Overall	65.6	13.6	20.8

Annex Table 47: Percentage breakdown of respondents expressing their views on how the transition to electric vehicles (EVs) by companies would impact drivers and partners

Location	Yes	No	May be
Delhi	60	8.2	31.8
Mumbai	45.8	21.3	32.9
Kolkata	62.5	5.4	32.1
Chennai	50.8	28.8	20.4
Bangalore	66.4	19.9	13.7
Pune/Pimpri-Chinchwad	82.9	7.4	9.7
Coimbatore	49.5	29.2	21.3
Ahmedabad	64.1	19.5	16.5
Hubli-Dharwad	80	11.2	8.8
Asansol	67	10.7	22.3
Overall	62.9	16.2	21

Annex Table 48: Percentage distribution of respondents indicating the importance of companies providing active support for their driver/partners during the transition to EVs

Location	Very important	Somewhat Important	Not at all important
Delhi	73.2	26.3	0.5
Mumbai	66.1	33.7	0.3
Kolkata	64.2	35.6	0.3
Chennai	64.8	32	3.2

Bangalore	64.3	34.4	1.3
Pune/Pimpri-Chinchwad	83.2	16.8	0
Coimbatore	59	35.5	5.5
Ahmedabad	63.8	31.1	5.1
Hubli-Dharwad	36.9	57.2	5.9
Asansol	76.7	22.8	0.5
Overall	65.2	32.5	2.3

Annex Table 49: Percentage distribution of respondents based on whether they would prioritize shopping from a company actively supporting its workers to ensure a fair transition to EVs

Location	Yes	No	May be
Delhi	72.1	8.4	19.5
Mumbai	47.9	7.6	44.5
Kolkata	72.8	3.8	23.5
Chennai	52.4	21.5	26.1
Bangalore	76.1	7	16.9
Pune/Pimpri-Chinchwad	85.8	5.5	8.7
Coimbatore	55.3	23.7	21.1
Ahmedabad	50.3	22.4	27.3
Hubli-Dharwad	81	10.7	8.3
Asansol	64.9	11.8	23.3
Overall	65.9	12.2	21.9

Annex Table 50: Distribution of respondents by their perceived importance of companies ensuring sustainably mined minerals and components in technology and vehicles adopted during the EV transition process

Location	Very Important	Somewhat Important	Not important at all	Not Applicable
Delhi	58.7	23.7	2.4	15.3
Mumbai	49.5	35.5	2.6	12.4
Kolkata	62.8	36.4	0	0.8
Chennai	61	32	4	3
Bangalore	58.1	40.1	1.6	0.3
Pune/Pimpri-Chinchwad	84	15.8	0.3	0
Coimbatore	55.8	36.3	5.5	2.4
Ahmedabad	64.9	30.3	4.1	0.8
Hubli-Dharwad	29.4	56.4	13.1	1.1
Asansol	72.4	26.3	1.1	0.3
Overall	59.7	33.2	3.5	3.7

Annex Table 51: Percentage breakdown of respondents expressing a preference for patronizing companies that actively support their manufacturers in ensuring sustainable sourcing of technology and components

Location	Yes	No	May be
Delhi	65.3	7.6	27.1
Mumbai	42.1	12.4	45.5

Kolkata	80.6	1.9	17.5
Chennai	53.2	18.6	28.2
Bangalore	79.3	4	16.7
Pune/Pimpri-Chinchwad	87.6	3.7	8.7
Coimbatore	60.3	19	20.8
Ahmedabad	46	26	28.1
Hubli-Dharwad	79.7	10.2	10.2
Asansol	73.7	9.9	16.4
Overall	66.8	11.3	21.9

ABOUT THE REPORT

RESEARCH AGENCY:

CMSR Consultants
fostering sustainable partnerships

The survey has been conducted by **CMSR Consultants** Pvt. Ltd., a multidisciplinary research and communication consultancy with specialisation in Social Research, communication research, Policy Research, Evaluations and Development Communications. The organisation has a pan-India presence and a strong network of Regional Partners and Business Associates. CMSR has undertaken several large scale projects and initiatives across the country and is widely known in the sector for its focus on sub-sectors including Agriculture, Livelihood, Gender, Environment & Climate Change, Health & Nutrition, WASH, etc. **www.cmsrconsultants.com**

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SUSTAINABLE MOBILITY NETWORK

The survey has been commissioned by the **Sustainable Mobility Network (SMN)**. The SMN is a network of organisations from across India that work on transportation and mobility issues. Key member organisations include:

Climate Group is an international non-profit, publicly launched in 2004, with offices in London, Amsterdam, Beijing, New Delhi, and New York. Our mission is to drive climate action, fast. Our goal is a world of net zero carbon emissions by 2050, with greater prosperity for all. We do this by forming powerful networks of business and government, unlocking the power of collective action to move whole systems such as energy, transport, the built environment, industry, and food to a cleaner future. Together, we're helping to shift global markets and policies towards faster reductions in carbon emissions.

Purpose is a global social impact organization that, for over 15 years, has been using storytelling and insight-led campaigns to engage and mobilize communities. Our campaigns aim to shift power, change narratives and behaviors, and influence decision makers to drive systemic change. With offices in North America, Brazil, UK & Europe, Kenya, India and Indonesia & APAC we work with leading organisations, businesses and philanthropies to inspire people to reimagine the world and use their power to make it happen.

Asar Social Impact Advisors (Asar) works on social and environmental issues by conducting research, ground truthing, and understanding local contexts in order to build innovative strategies that are rooted in reality. Asar convenes conversations and helps build relationships between various stakeholders to be able to sustain collaborations essential to catalyse momentum and result in change.

Climate Trends is a research-based consulting and capacity building initiative that aims to bring greater focus on issues of environment, climate change and sustainable

development. We specialise in developing comprehensive analyses of complex issues to enable effective decision making in private and public sector

Waatavaran is an organisation which works hyper-locally to slow down climate change and mitigate its impact on vulnerable communities. We believe in nurturing the symbiotic relationship that co-exists between humans and nature to create a climate just habitable environment for everyone. We are actively working on resolving air pollution issues that currently plague the urban areas and are building a Sustainable Forest Management in the tribal villages of Maharashtra State.

Established in 2008, **Environment Conservation Society (SwitchON Foundation)** is a registered non governmental organisation dedicated to work towards equitable and sustainable development. Our journey commenced from a cycle ride undertaken by a handful of socially passionate youth in order to propagate the idea of environmental awareness across the youth and the marginal communities of the country. The seeds of ideas sowed in the journey laid the foundation for SwitchON's work. Over the years we have focussed on a multi-pronged approach to attain sustainable development. We have over a decade of experience in designing programmes to promote clean energy access , sustainable agribusiness, capacity building to enhance rural livelihoods and holistic wellbeing of the marginalised communities across Eastern India. We have also worked extensively across the urban sphere, especially in Kolkata to promote sustainable lifestyle and general well-being of the citizens.

SUSTAINABLE MOBILITY NETWORK

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