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The world is moving again.

In the battle of perceptions versus data, data must prevail.

Perception
versus
Data

- Some Business Managers 'believe' that traffic in India continues to be sparse

- This belief can be disproved by data. All they need to do is look/listen

- Some Business Managers continue to 'believe' that this pandemic has crippled people's will to travel in cities across India

- There is rich data to prove that it has not

Exhibit 1
Google Maps data proves that travel times are now 75%+ of peak travel times

- Data captured from Google Maps
  - Data on time taken for point-to-point trips every day
- Travel times in cities is 'close' to peak
  - Peak time was measured in January 2020
- Mumbai – between 78% and 99%
- Delhi –~70%
- Bengaluru – between 85% and ~90%

# Exhibit 1A: Mumbai 'Morning traffic' takes 78% - 90% of peak time

From Mira Road to Bandra ROB

- 38 minutes – Minimum time (lockdown)
- 70 minutes – July-end
- 80 minutes – August-end
- **85 minutes – September 3rd week (90% of max time)**
- **95 minutes – Maximum Time (January 2020)**
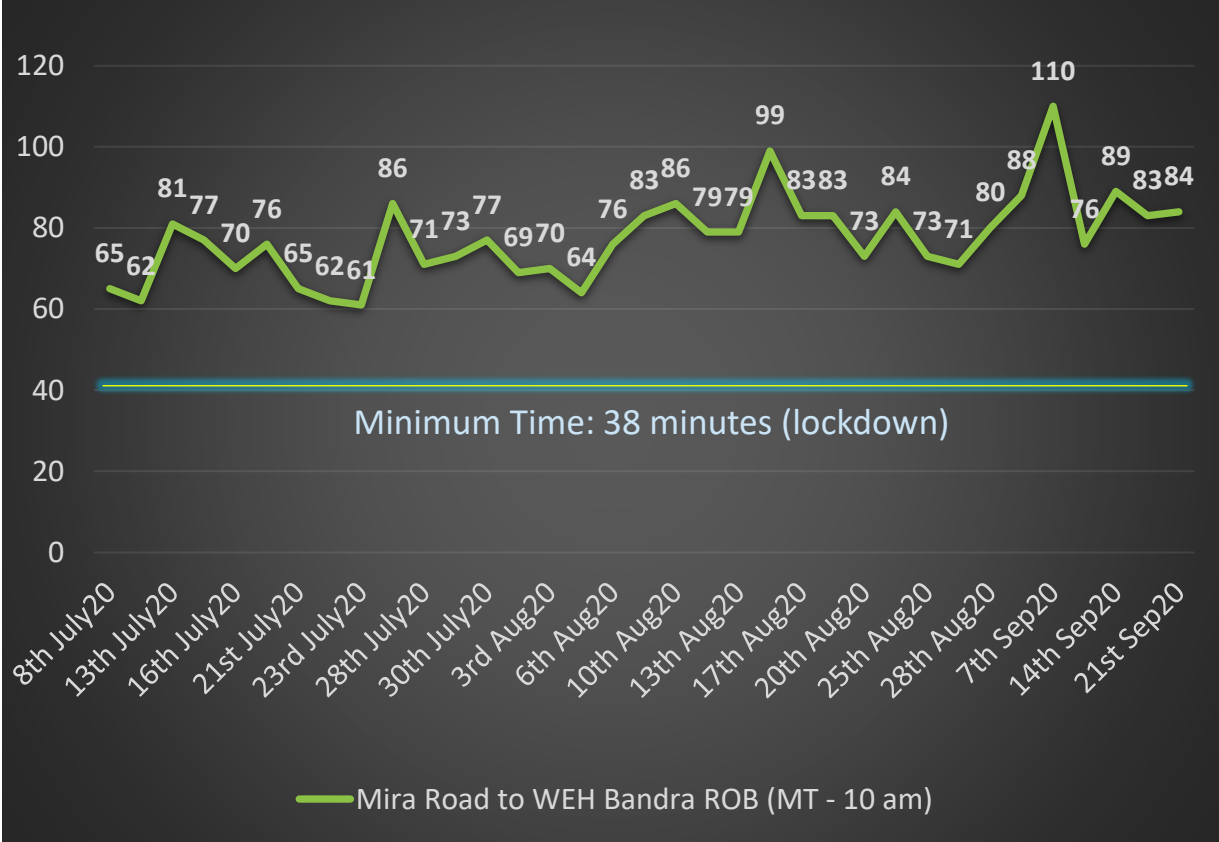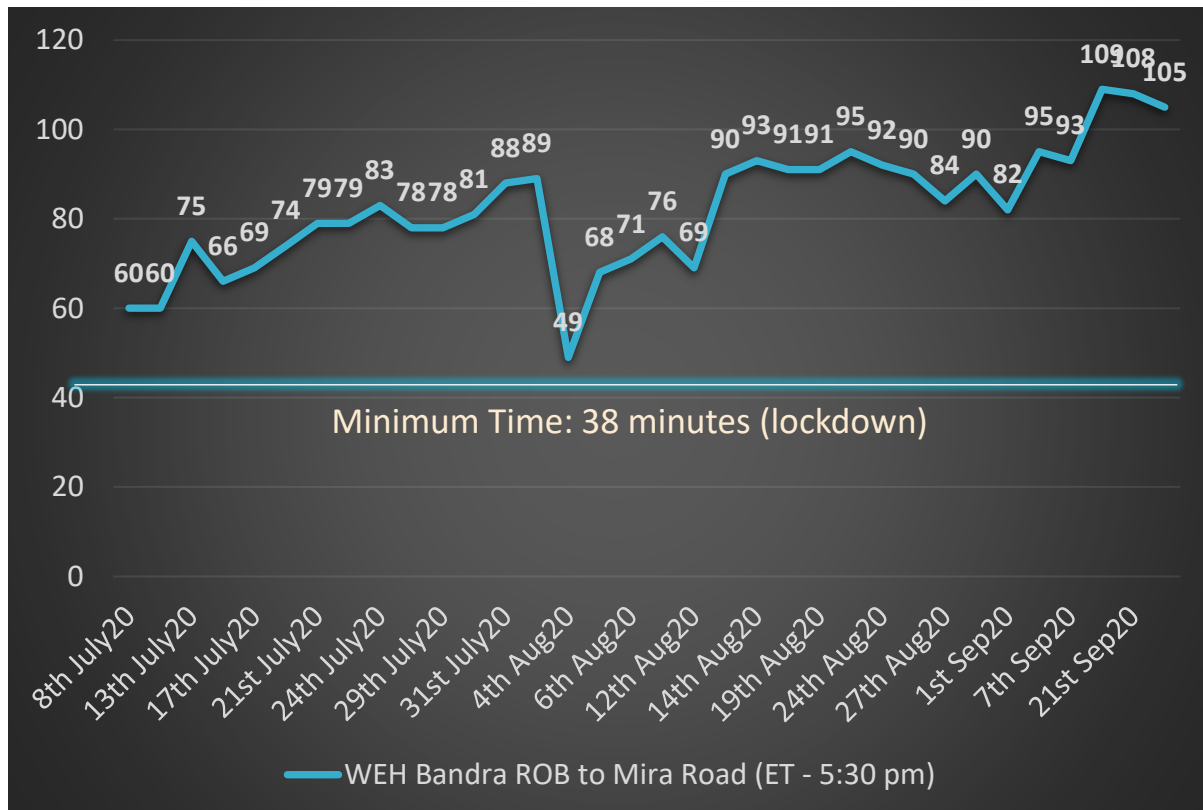
From Bandra ROB to Cuffe Parade

- 26 minutes – Minimum (lockdown)
- 36 minutes – Early July
- 50 minutes – late August
- **51 minutes – September 3rd week (78% of max time)**
- **65 Minutes – Maximum Time (January 2020)**

Mira Road to WEH Bandra ROB (MT - 10 am)

WEH Bandra ROB to Cuffe Parade (MT - 10 am)
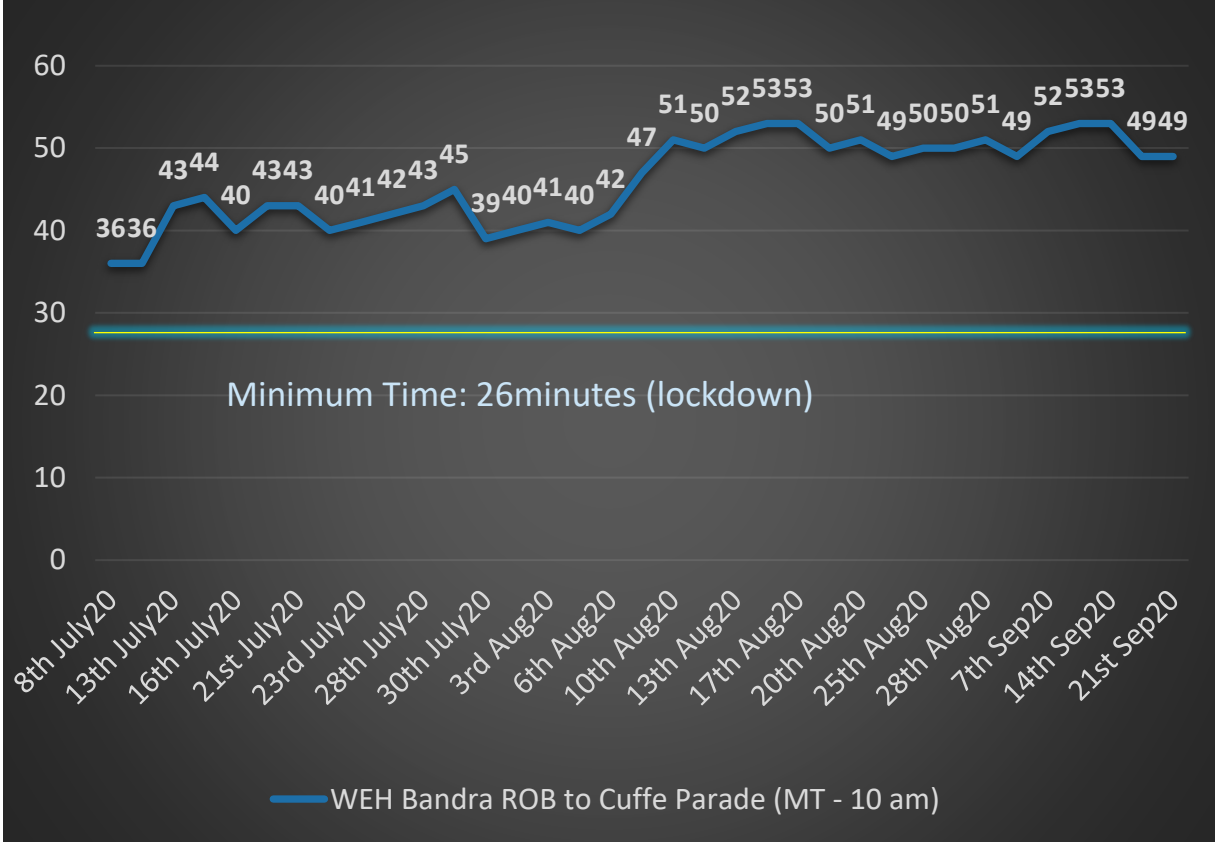
# Exhibit 1B: 'Evening traffic' travel time in Mumbai is 80% - 99% of peak

From Bandra ROB to Mira Road

- 38 minutes – Minimum (lockdown)
- 60 minutes – Early July
- 90 minutes – late August
- **104 minutes – September 3rd week (99% of max time)**
- **105 Minutes – Maximum Time (January 2020)**
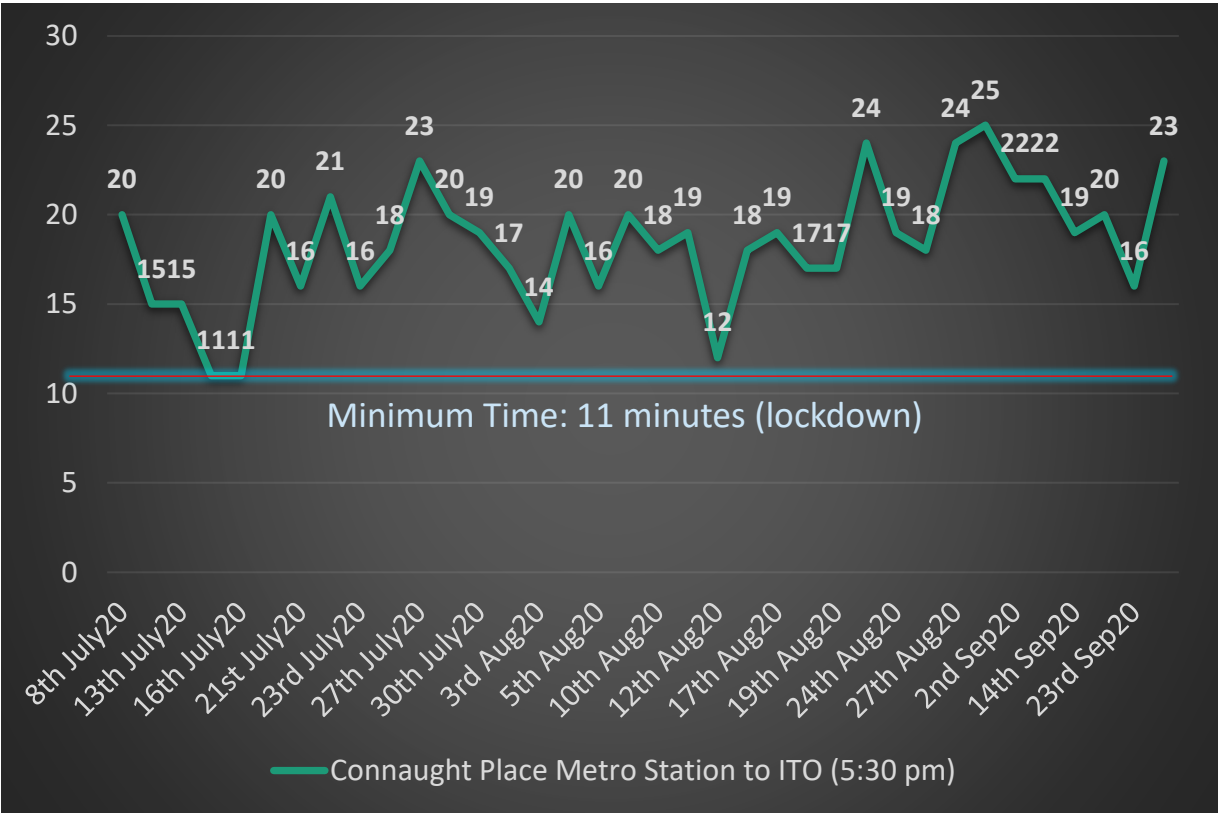
From Cuffe Parade to Bandra ROB

- 26 minutes – Minimum (lockdown)
- 36 minutes – Early July
- 48 minutes – late August
- **52 minutes – September 3rd week (80% of max time)**
- **65 Minutes – Maximum Time (January 2020)**
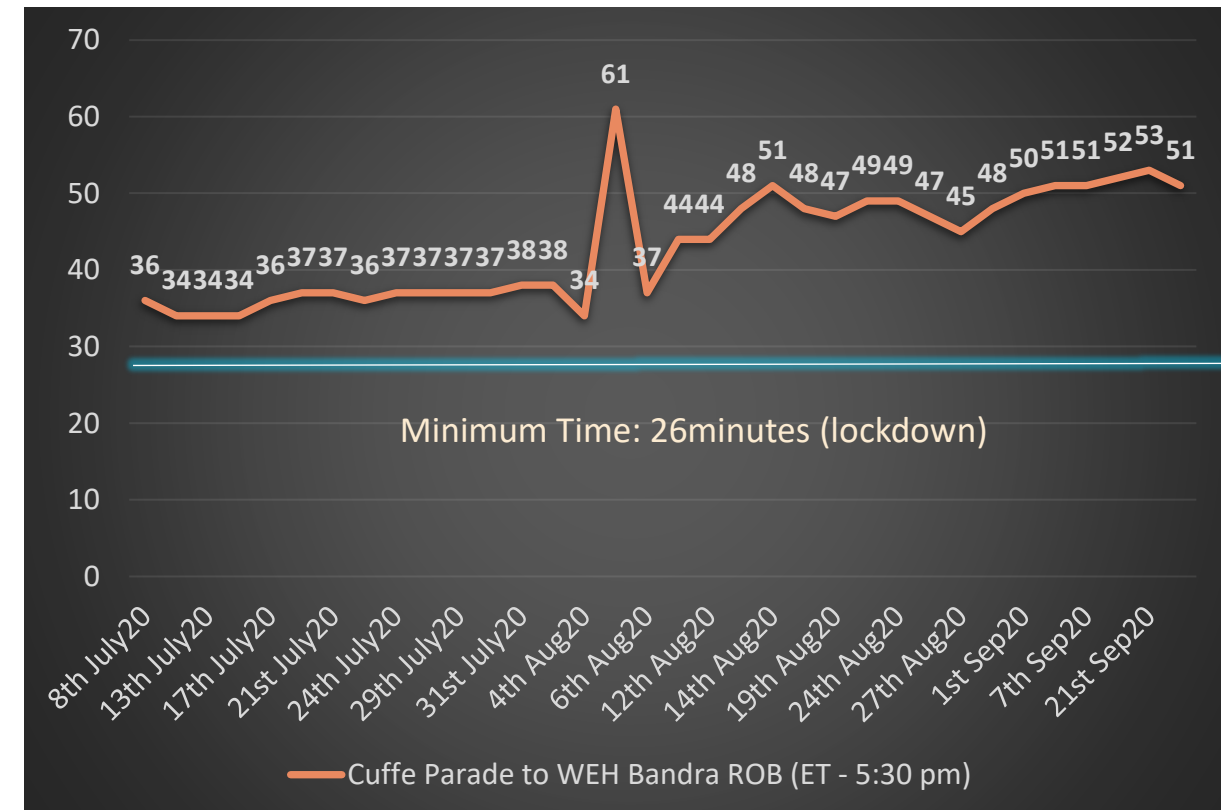
# Exhibit 1C: Traffic in Delhi takes ~70% of peak travel time

From Connaught Place Metro to ITO

- 11 minutes – Minimum (lockdown)

- 18 minutes – Early July

- 25 minutes – late August

- **20 minutes – September 3rd week**

- **38 Minutes – Maximum Time (January 2020)**

From Nehru Place to Ashram Metro

- 11 minutes – Minimum (lockdown)

- 18 minutes – Early July

- 24 minutes – late August

- **25 minutes – September 3rd week**

- **34 Minutes – Maximum Time (January 2020)**
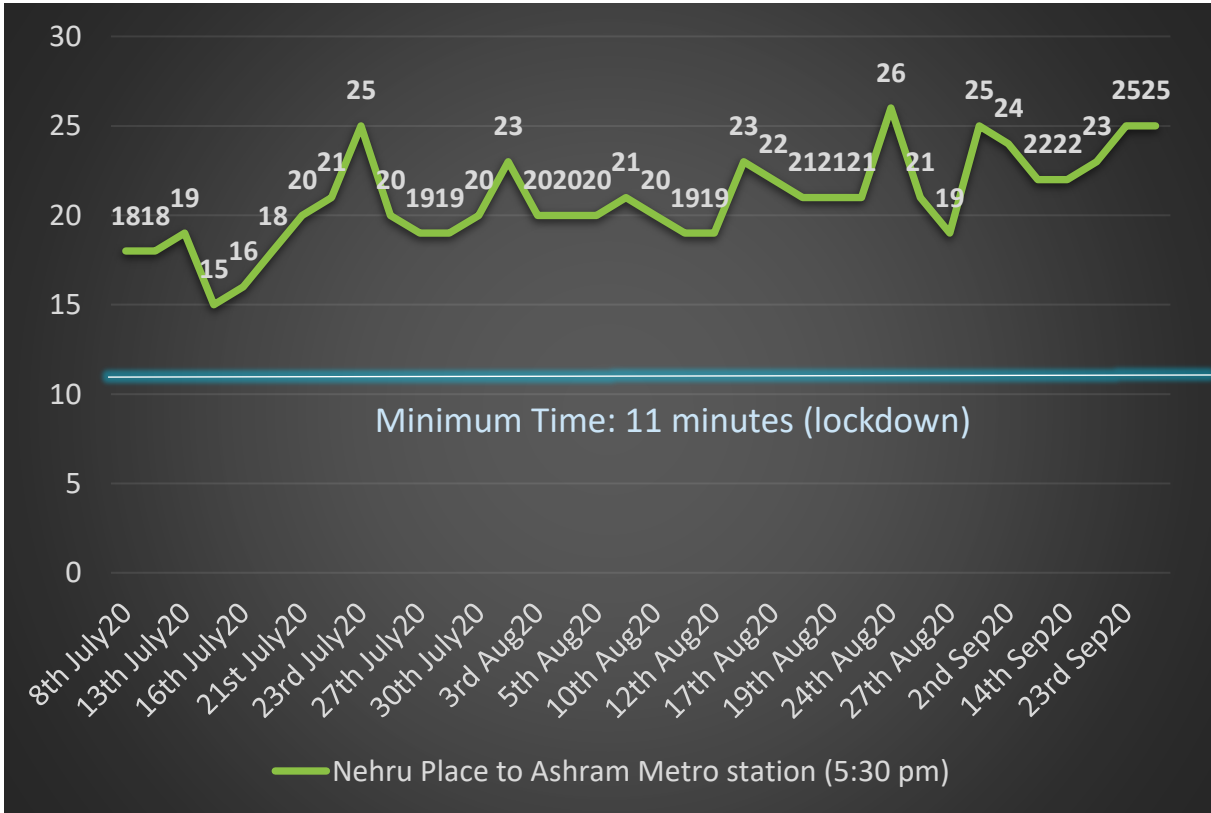
Exhibit 1D: Bengaluru travel times are ~85% to 90% of peak
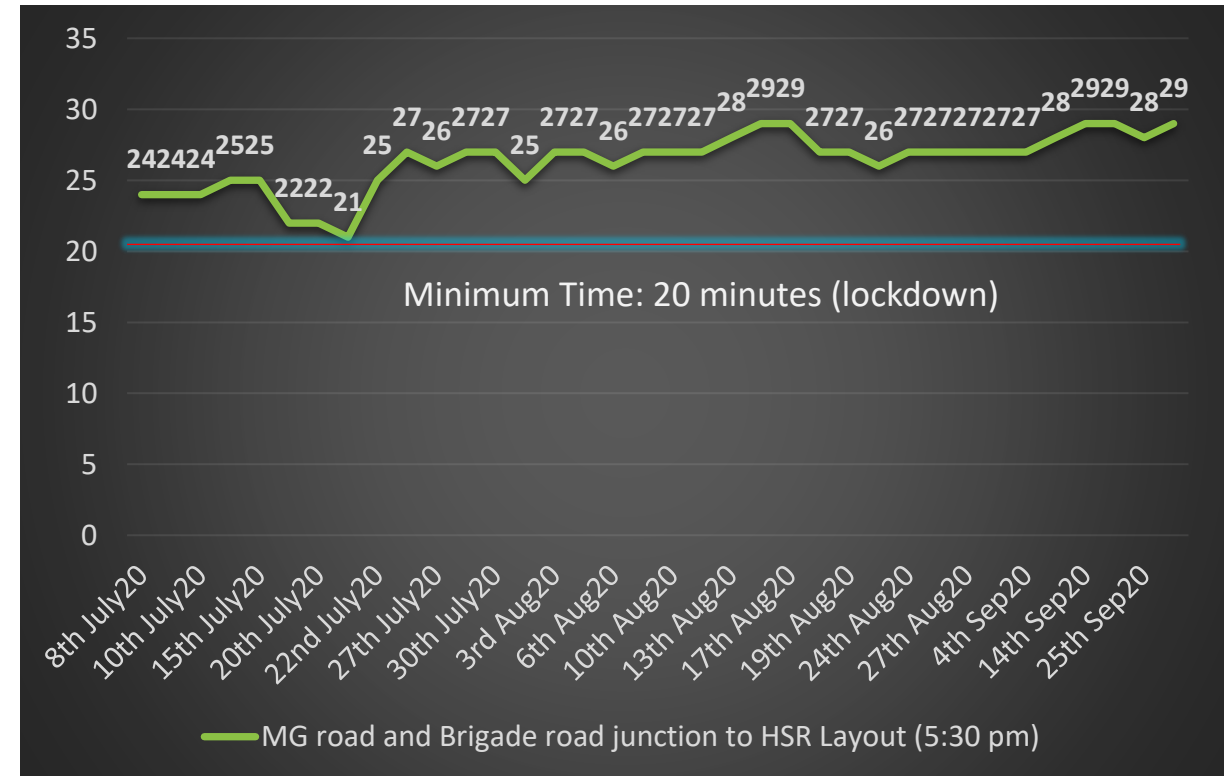
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From Yeshwanthpur to Indiranagar

- 28 minutes – Minimum (lockdown)

- 44 minutes – Early July

- 53 minutes – late August

- **58 minutes – late September (90% of max time)**

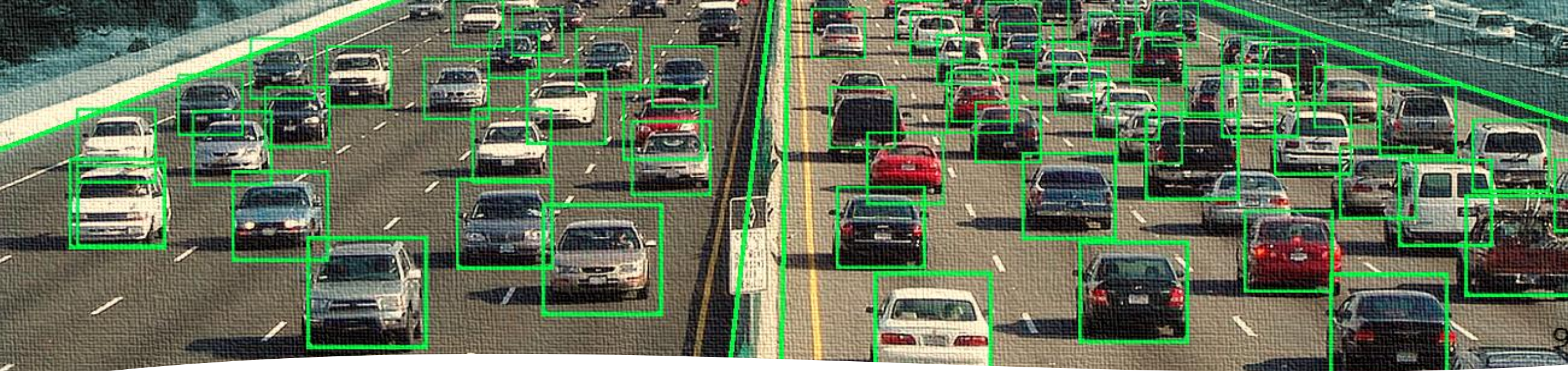- **65 Minutes – Maximum Time (January 2020)**
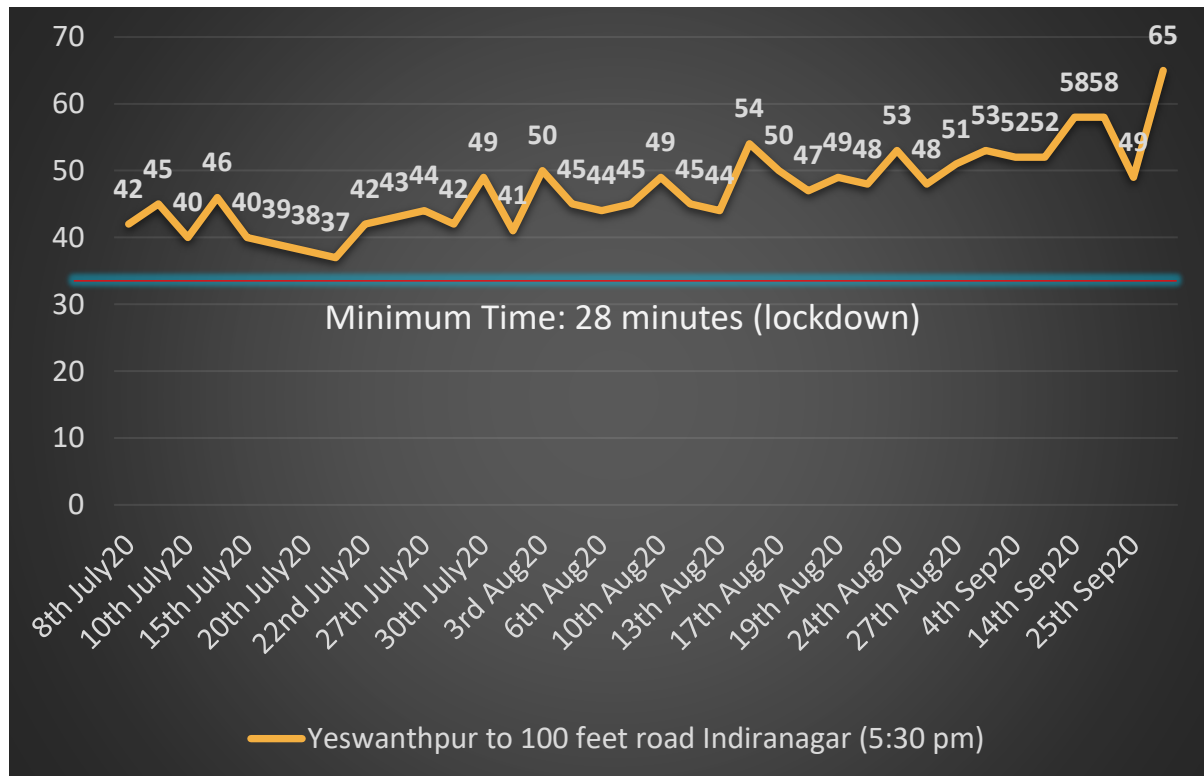
From MG/Brigade Road Junction to HSR Layout

- 20 minutes – Minimum (lockdown)

- 25 minutes – Early July

- 27 minutes – late August

- **29 minutes – late September (85% of max time)**

- **34 Minutes – Maximum Time (January 2020)**

Yeswanthpur to 100 feet road Indiranagar (5:30 pm)

MG road and Brigade road junction to HSR Layout (5:30 pm)

Exhibit 2
New, cutting-edge data from app-data aggregators is spawning a new level of analytics that prove that traffic numbers are real.

- SHARP from Laqshya provides accurate residential and traffic computations for ~30,000 geo-tagged locations across 32 cities in India

- Uses metadata* (anonymized data) from ~200 million handsets/2 billion time- stamps from across India.

- With the help of this metadata, plus data from its commissioned traffic count study, and from its mega-outreach programme with a telecom company, SHARP has the capability to compute accurate traffic quantity and quality

*Lifesight.io supplies data as per GDPR regulations for data privacy

Exhibit 2A – The return of the Automobiles

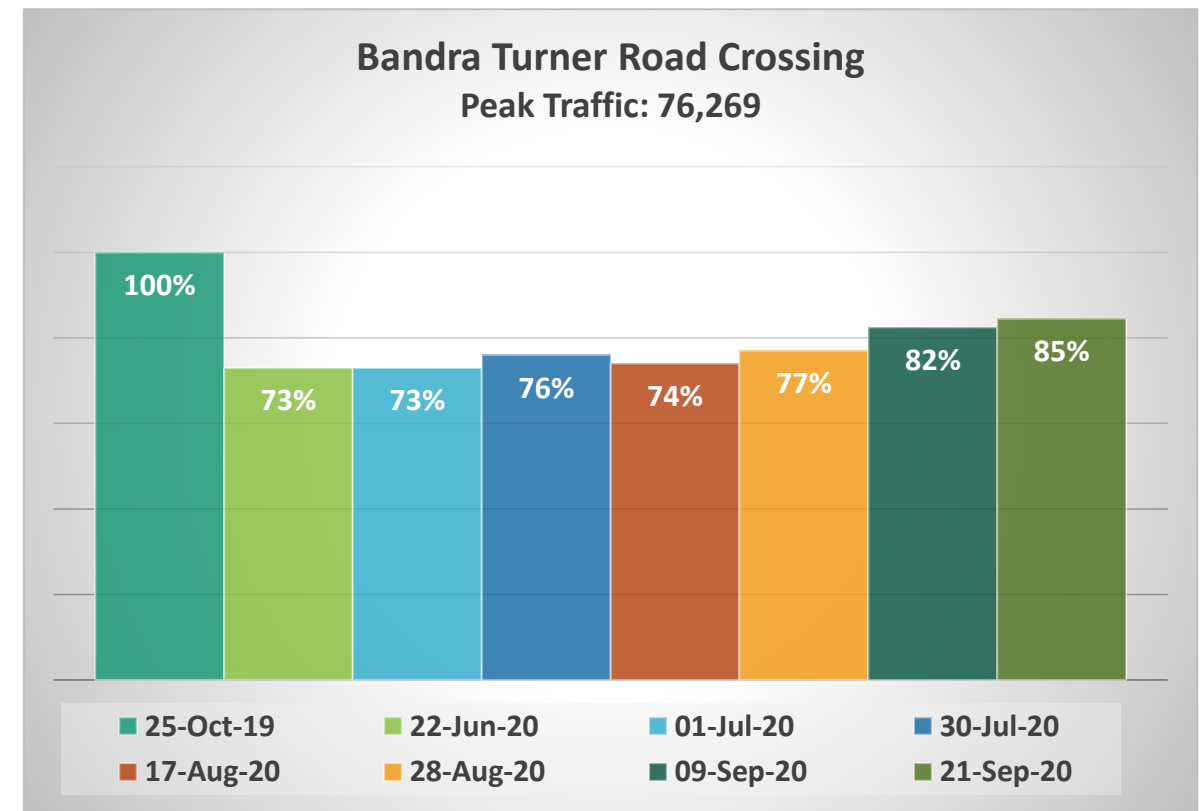One drive down the highway in the evening, and it's easy to perceive the 'return of the automobiles'.

At **Jog Flyover, Western Express Highway**, human traffic (number of people in vehicles, on 2-wheelers and pedestrians) is **86% of the peak** of October 2019.
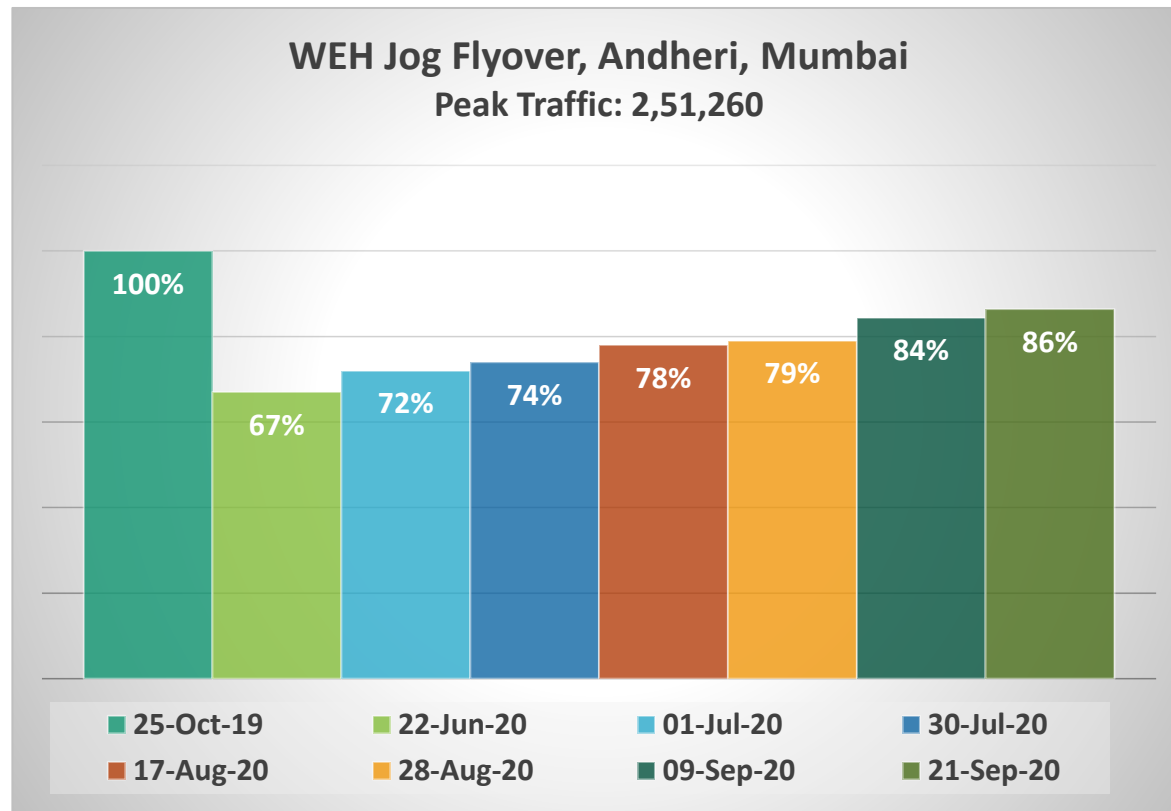
At the **Bandra Turner Road Crossing**, human traffic is **85% of the peak** of pre-Diwali numbers in 2019.

WEH Jog Flyover, Andheri, Mumbai
Peak Traffic: 2,51,260

100%
67%
72%
74%
78%
79%
84%
86%

Bandra Turner Road Crossing
Peak Traffic: 76,269

100%
73%
73%
76%
74%
77%
82%
85%

■ 25-Oct-19   ■ 22-Jun-20   ■ 01-Jul-20   ■ 30-Jul-20
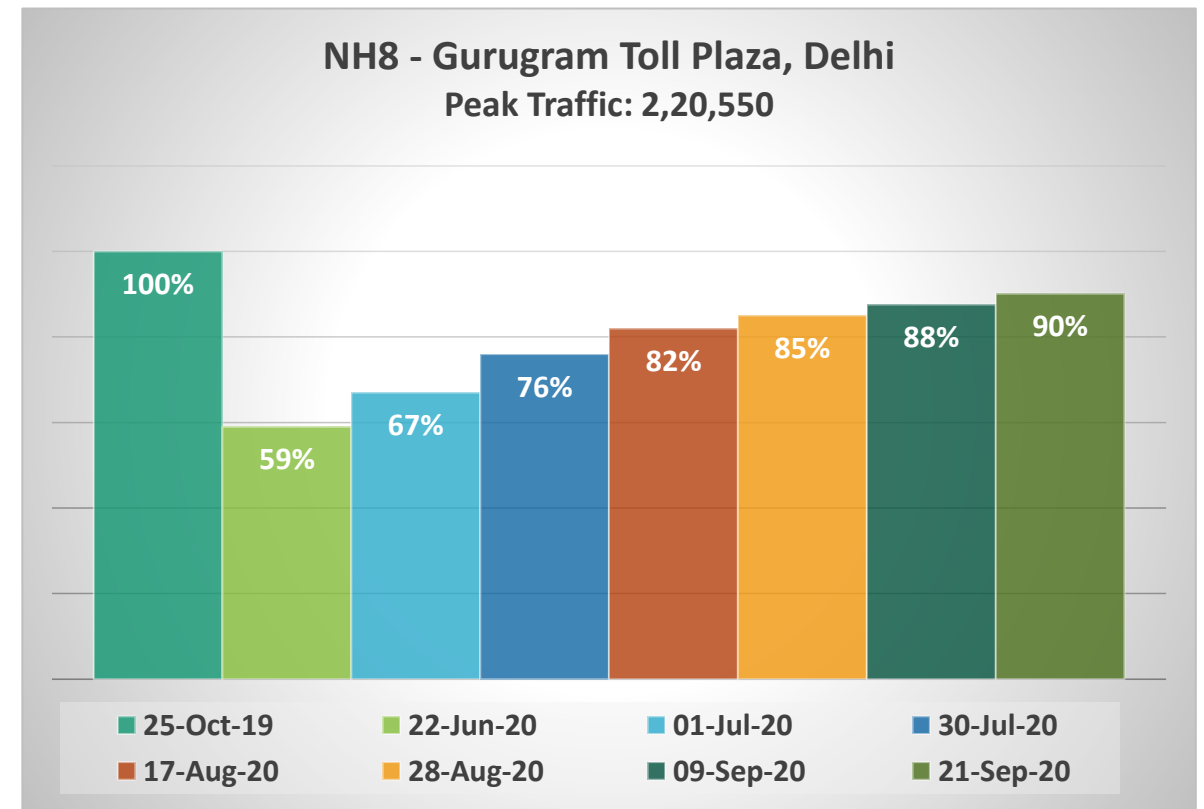■ 17-Aug-20   ■ 28-Aug-20   ■ 09-Sep-20   ■ 21-Sep-20

Exhibit 2B – Delhi with clean air and ~90% people

The lockdown allowed Delhi's air to heal. And now that its traffic is almost normal, the businesses can heal too.

At the famous **ITO Crossing,** human traffic (people in vehicles, on 2-wheelers plus pedestrians) is at **88%** of the super-peak pre-Diwali traffic of 2019.
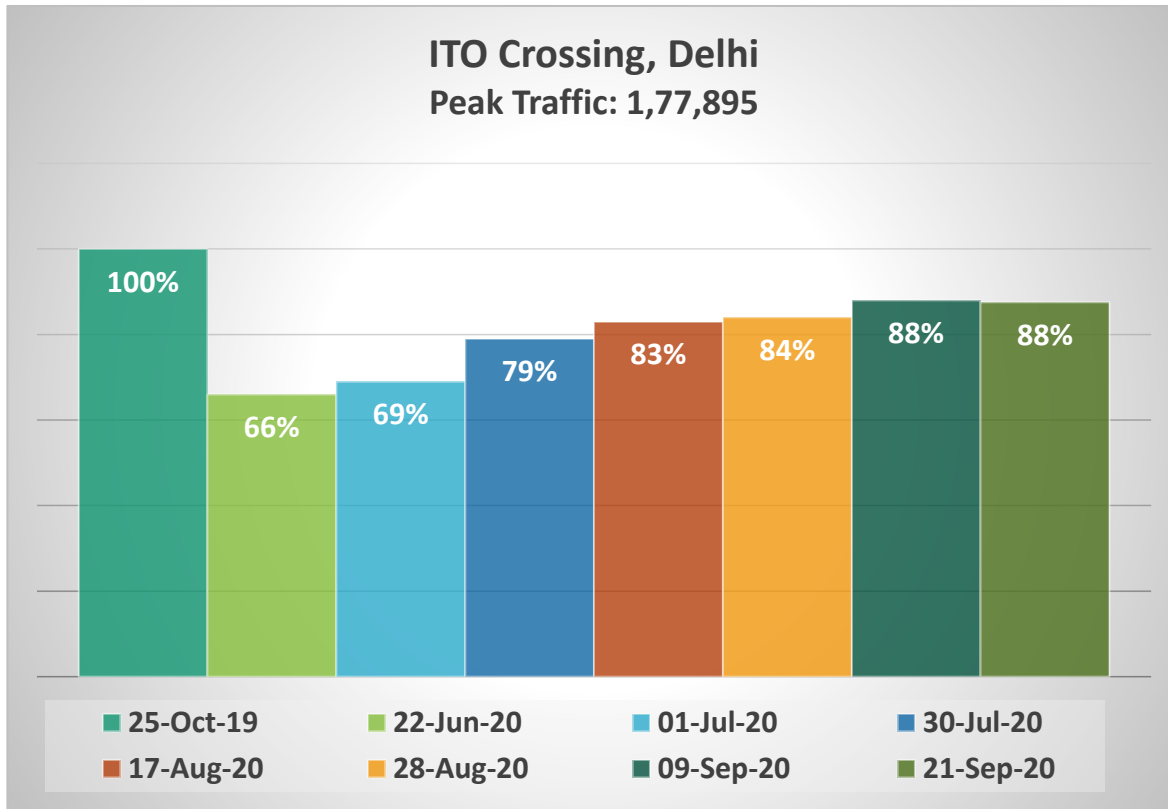
On **NH8, Delhi's largest road**, where Delhi meets Gurugram, the erstwhile Toll plaza, human traffic is back to **90%** of Peak traffic (pre-Diwali, 2019).

ITO Crossing, Delhi
Peak Traffic: 1,77,895

100% | 66% | 69% | 79% | 83% | 84% | 88% | 88%

25-Oct-19 | 22-Jun-20 | 01-Jul-20 | 30-Jul-20
17-Aug-20 | 28-Aug-20 | 09-Sep-20 | 21-Sep-20

NH8 - Gurugram Toll Plaza, Delhi
Peak Traffic: 2,20,550

100% | 59% | 67% | 76% | 82% | 85% | 88% | 90%

25-Oct-19 | 22-Jun-20 | 01-Jul-20 | 30-Jul-20
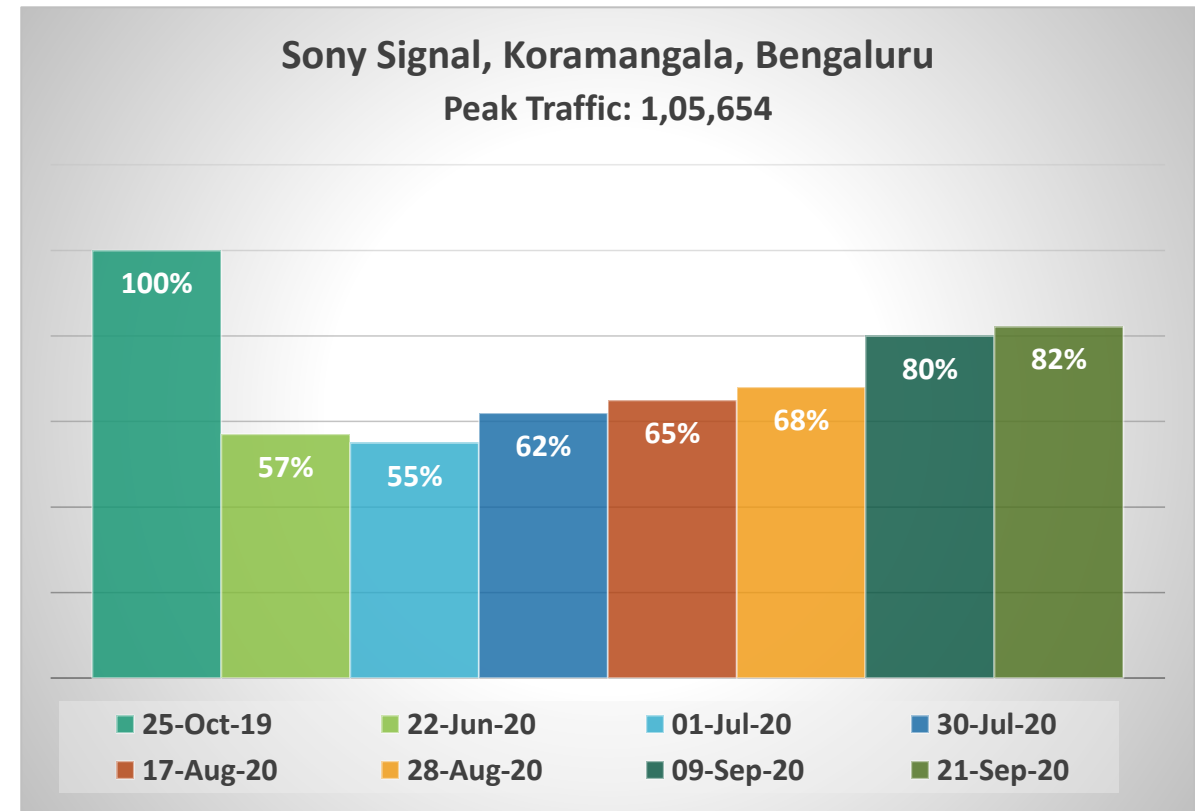17-Aug-20 | 28-Aug-20 | 09-Sep-20 | 21-Sep-20

Exhibit 2C – Bengaluru, most amenable to WFH, has 82+%

The IT industry, HQ'd in Bengaluru, is the least impacted in terms of work delivery. That is evident as traffic build-up is the least as compared to Delhi & Mumbai, but still exceeds 80% overall.

On the 100ft Road in **Indira Nagar**, human traffic (people in vehicles, on 2-wheelers plus pedestrians) is at **85%** of the super-peak pre-Diwali traffic of 2019.
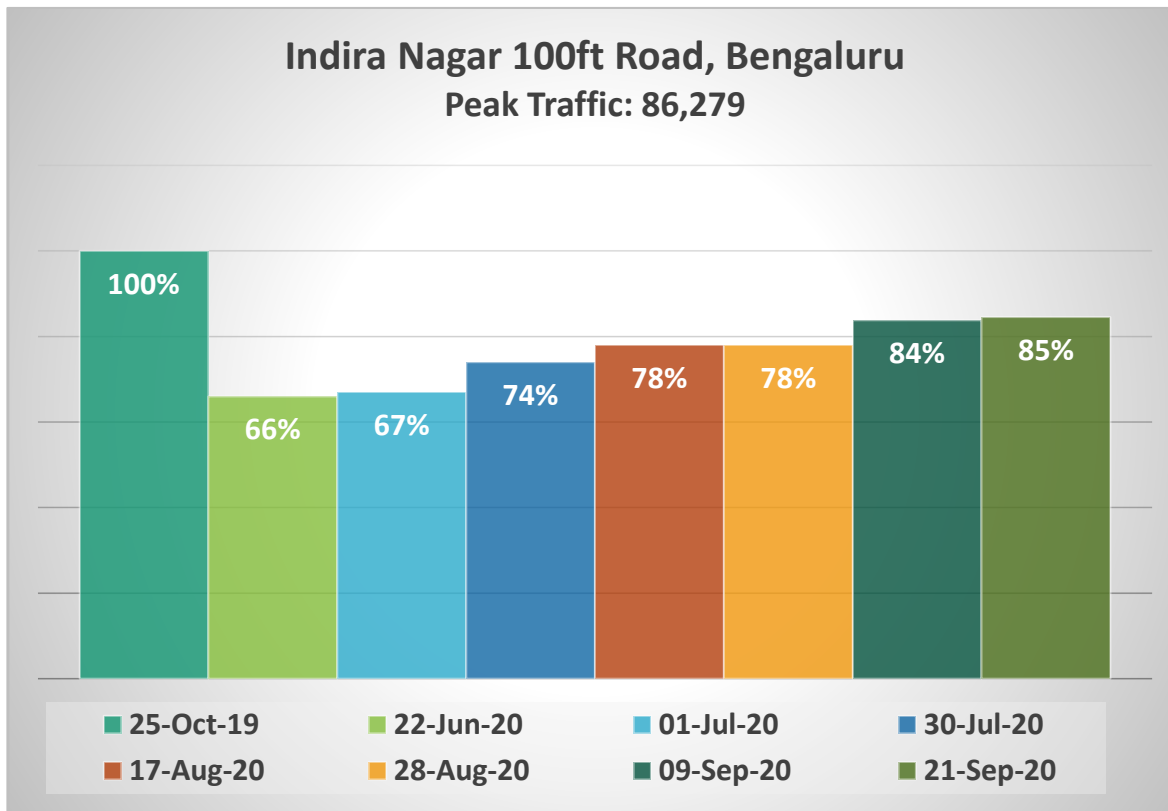
Around the IT-industry hub of **Koramangala,** human traffic is 'only' **82%** of the pre-Diwali peak of 2019.

Indira Nagar 100ft Road, Bengaluru
Peak Traffic: 86,279

- 100%
- 66%
- 67%
- 74%
- 78%
- 78%
- 84%
- 85%

Legend:
- 25-Oct-19
- 22-Jun-20
- 01-Jul-20
- 30-Jul-20
- 17-Aug-20
- 28-Aug-20
- 09-Sep-20
- 21-Sep-20

Sony Signal, Koramangala, Bengaluru
Peak Traffic: 1,05,654

- 100%
- 57%
- 55%
- 62%
- 65%
- 68%
- 80%
- 82%

Legend:
- 25-Oct-19
- 22-Jun-20
- 01-Jul-20
- 30-Jul-20
- 17-Aug-20
- 28-Aug-20
- 09-Sep-20
- 21-Sep-20

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Few buy a vehicle while staying at / working from home

- Between June and September, 2020, people in India bought: 38.4+lakh 2-Wheelers, 6.5+ lakh Passenger Vehicles and 2.57+ lakh Tractors (Source: FADA)
- Overall, passenger vehicle sales have gone from 62% (June 20 vs June 19) to ~110% (Sep 20 vs Sep 19).
- Tractor sales for June/July/Aug/Sep 2020 are 138% as compared to the corresponding period in 2019.
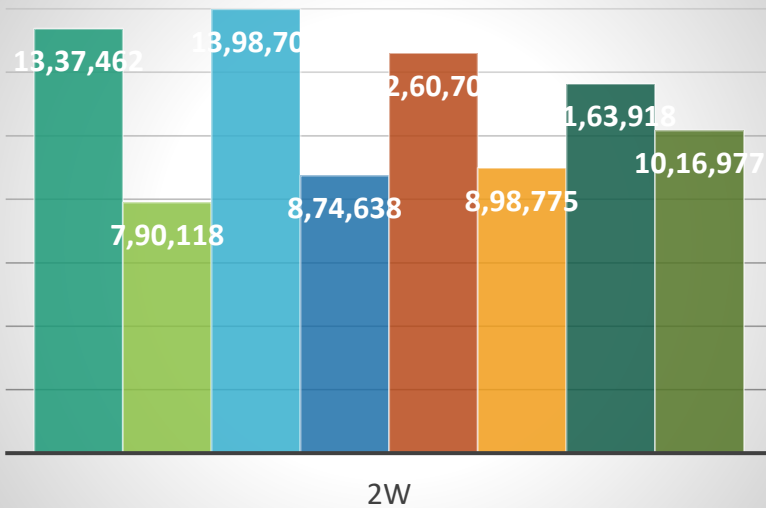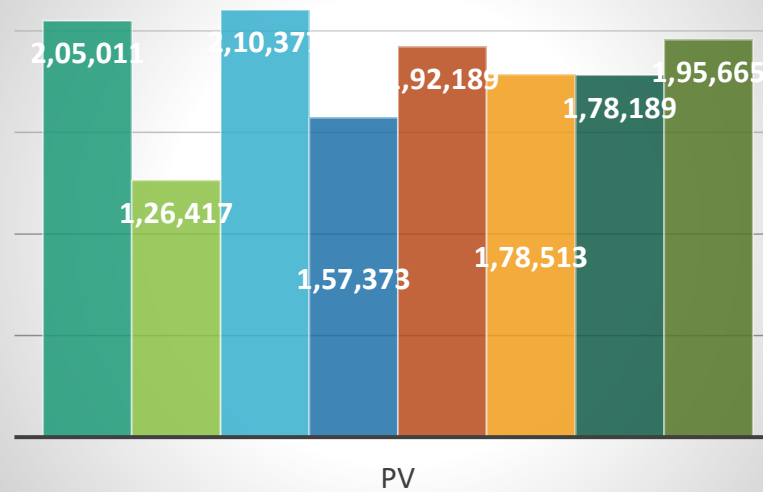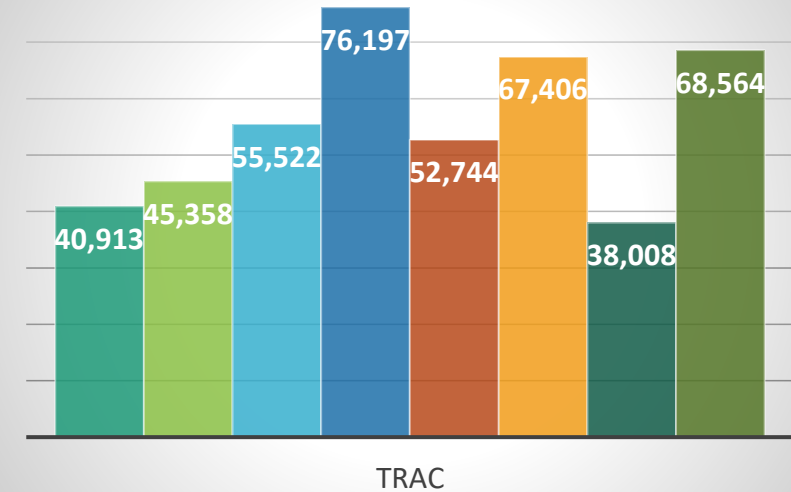
The lockdown period was great for ecommerce:

- **Beauty & wellness** has witnessed an unprecedented order volume growth of around **130%** [*]

- Followed by **FMCG** with a growth of **55%** [*]

- Third: **Agriculture and health & pharma** with **38%.** [*]

- **Brand websites** have witnessed **88% order volume growth** as compared to **32% order volume growth on marketplaces**. [*]

- Currently, **Tier II** and beyond cities contribute around **66% of the total online consumer demand** in India and this share is expected to rise in the coming years. [*]

- Another interesting trend observed is **Tier II and beyond cities** have seen a **significant reduction of ~23% in overall returns**. This change can be attributed to increasing technology adoption, improved last-mile delivery, and customer centric return policies.

- The Indian eCommerce Sector has already become a heavyweight segment with a market size of **$50 billion**. In the coming five years, this figure will further grow more than three times to reach a market size of **$188 billion**.[#]

How can this growth be sustained?

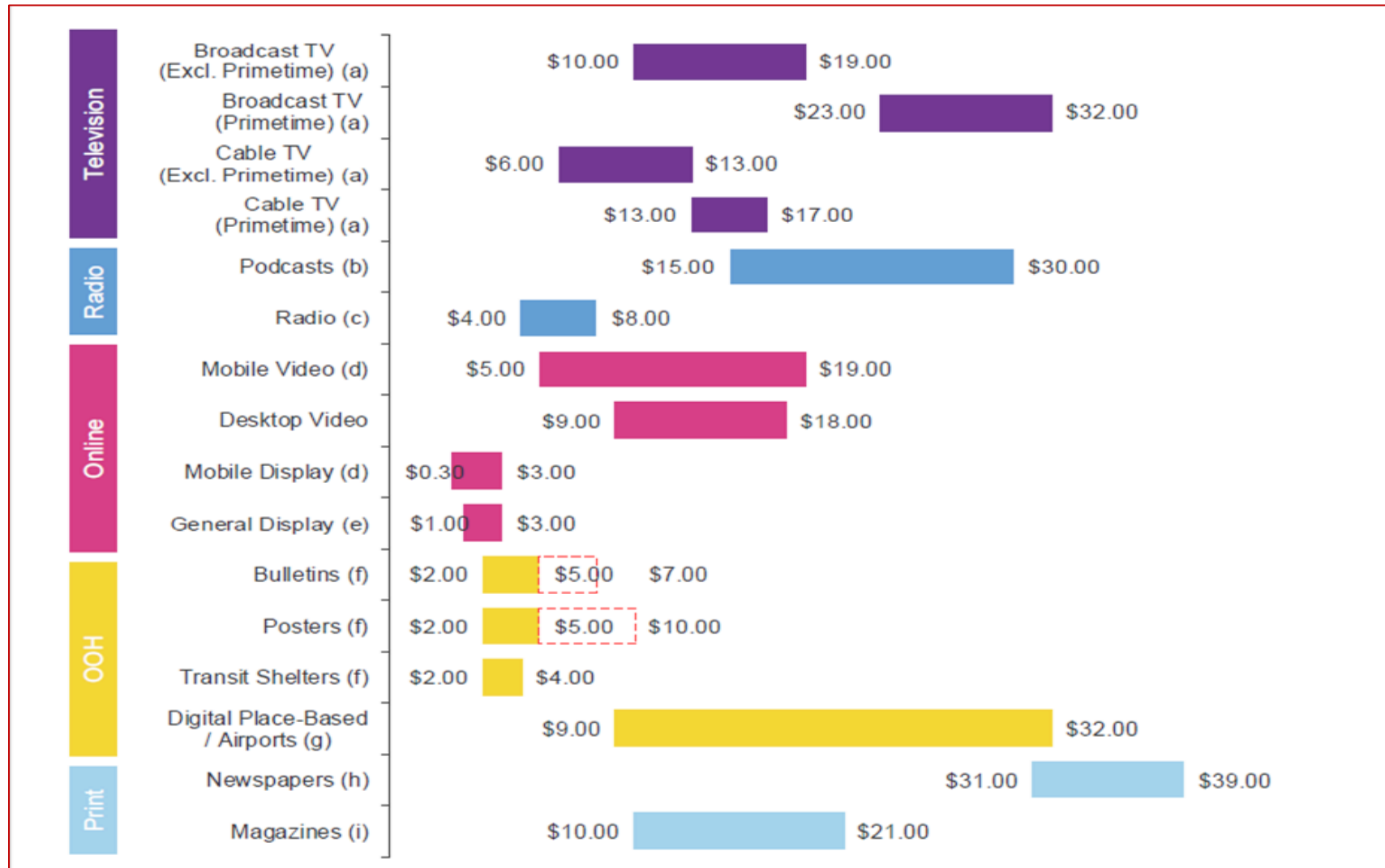[*] Unicommerce Report, 2020; [#] Economic Times, Jan 20, 2020

In the post-lockdown period,
where should the advertisement budgets go?

A comparison of media costs and effectiveness

For retail and ecommerce marketers

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Invest in media where cost is low…

Television
- Broadcast TV (Excl. Primetime) (a): $10.00 – $19.00
- Broadcast TV (Primetime) (a): $23.00 – $32.00
- Cable TV (Excl. Primetime) (a): $6.00 – $13.00
- Cable TV (Primetime) (a): $13.00 – $17.00

Radio
- Podcasts (b): $15.00 – $30.00
- Radio (c): $4.00 – $8.00

Online
- Mobile Video (d): $5.00 – $19.00
- Desktop Video (d): $9.00 – $18.00
- Mobile Display (d): $0.30 – $3.00
- General Display (e): $1.00 – $3.00

OOH
- Bulletins (f): $2.00 – $5.00 – $7.00
- Posters (f): $2.00 – $5.00 – $10.00
- Transit Shelters (f): $2.00 – $4.00
- Digital Place-Based / Airports (g): $9.00 – $32.00

Print
- Newspapers (h): $31.00 – $39.00
- Magazines (i): $10.00 – $21.00

PJ SOLOMON
US MAJOR
MEDIA CPM
COMPARISON

And recall is high!

- Based on PJ Solomon independent study of the five primary advertising media
- Ad recall defined as ad effectiveness in which respondents were exposed to ads and then at a later point in time, asked if they remembered the ad on and aided/unaided basis
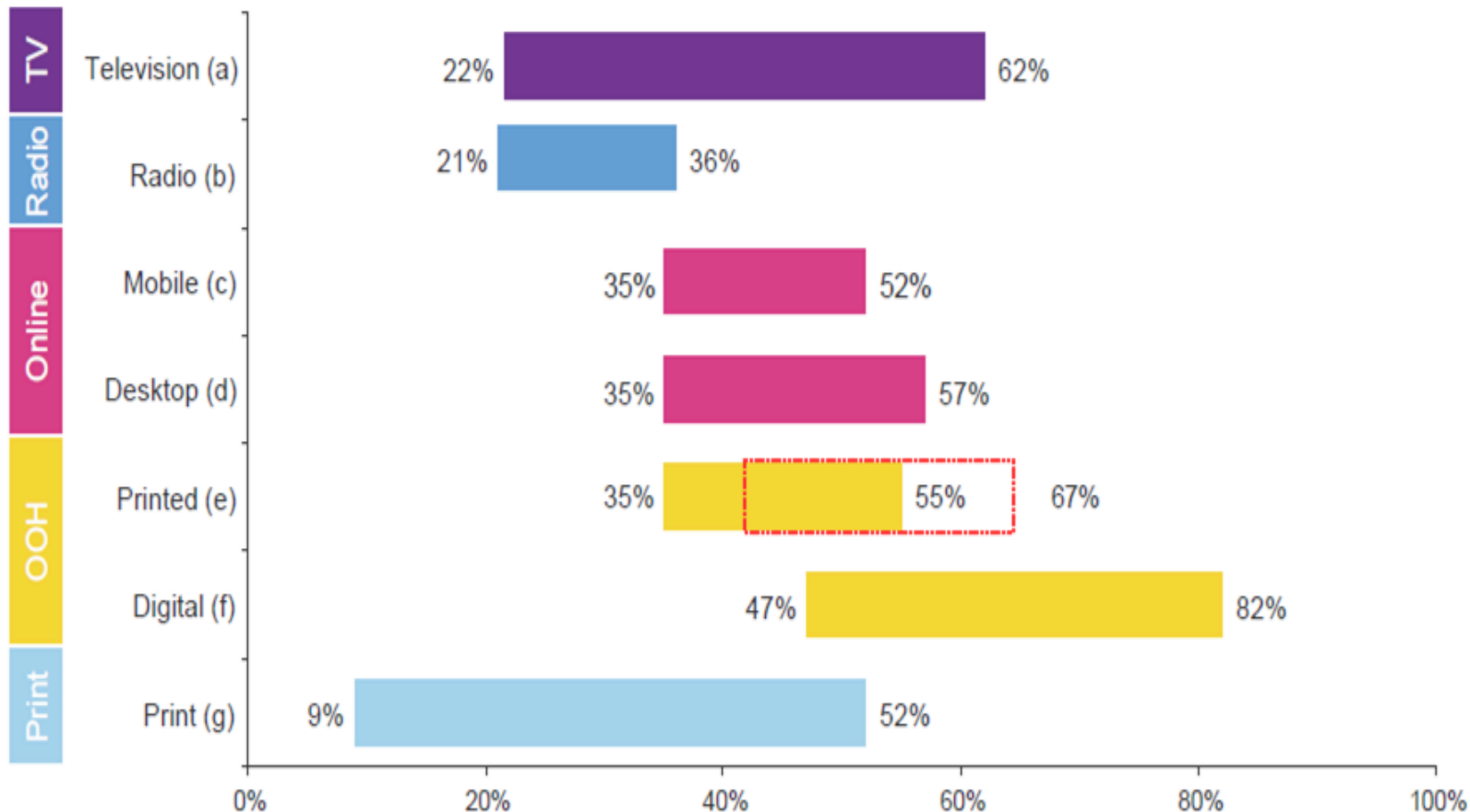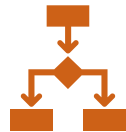
In Sum
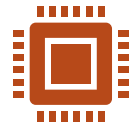
Data-driven marketing is more effective today than ever before

The quantum of data available and analytical techniques have both grown by leaps and bounds

The business leaders today must not lose the way by following 'gut feel', belief, opinion.

There are millions of opportunities 'back on the roads'

All they need to do is take a look!

About Laqshya Media Insights Group

- This report has been created by the Laqshya Media Insights Group, the division also responsible for developing the software platform called Strategic Hyperlocal AI-aided Reach Planner (SHARP), one of the world's most advanced, data-rich OOH planning platforms.

  - SHARP uses a complex algorithm that combines Census data, data from a commissioned market research study, data from a telecom partner and 2 billion app aggregator records a day to generate dynamic traffic patterns for its users.

- LMIG also compiles OOH, Experiential and Digital Intelligence to make data-driven plans for clients across the group

- The team at LMIG is a combination of engineers, data analysts, strategists and researchers across 3 cities.

- The team holds 8 engineering patents and has published several papers (www.Laqshyagroup.com/report.html)

- Founded in 1997, **Lashya Media Group** is the largest comprehensive marketing communications group in India

- Laqshya Media Group leads the development of cutting-edge technological solutions to contemporize the landscape of advertising services in India

- Functioning primarily in the Outdoor, Events and Digital verticals.

- It currently employs over 400 professionals across 22 offices.

For more exciting reports, please connect with us at:

www.laqshyagroup.com/report.html

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