LAQSHYA
MEDIA GROUP

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
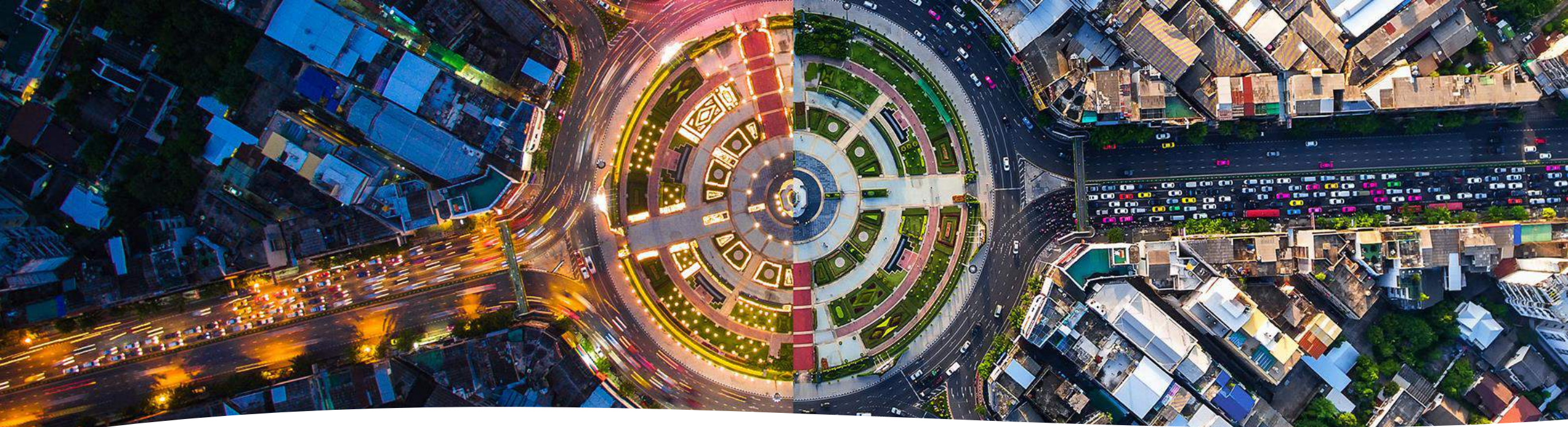
Exhibit 1
Google Maps data proves that travel times are now 90%+ of peak travel times

- Data captured from Google Maps
  - Data on time taken for point-to-point trips every day
- Travel times have exceeded peak times in Mumbai
  - Peak time was measured in January 2020
- Mumbai – Between 90% and 106%
- Delhi – ~70% to 80%
- Bengaluru – Between 93% and ~96%

LAQSHYA
MEDIA GROUP

SHARP

Exhibit 1A: Mumbai 'Morning traffic' takes 90% - 102% of peak time

LAQSHYA MEDIA GROUP

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)
- 97 minutes – October (102% of max time)
- **101 minutes – November (106% of max time)**
- **95 minutes – Maximum Time (January 2020)**
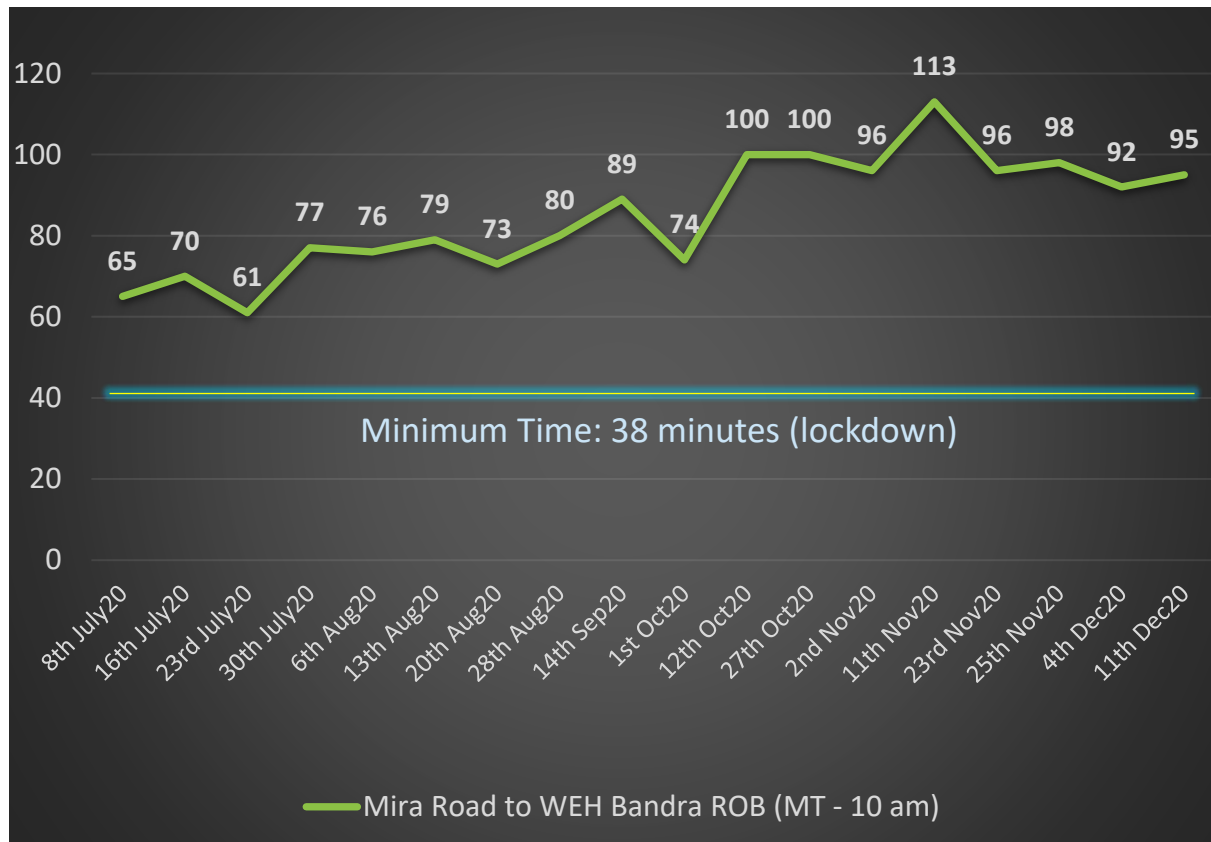
From Bandra ROB to Cuffe Parade

- 26 minutes – Minimum (lockdown)
- 36 minutes – Early July
- 50 minutes – Late August
- 51 minutes – September 3rd week (78% of max time)
- 52 minutes – October (80% of max time)
- **54 minutes – November (83% of max time)**
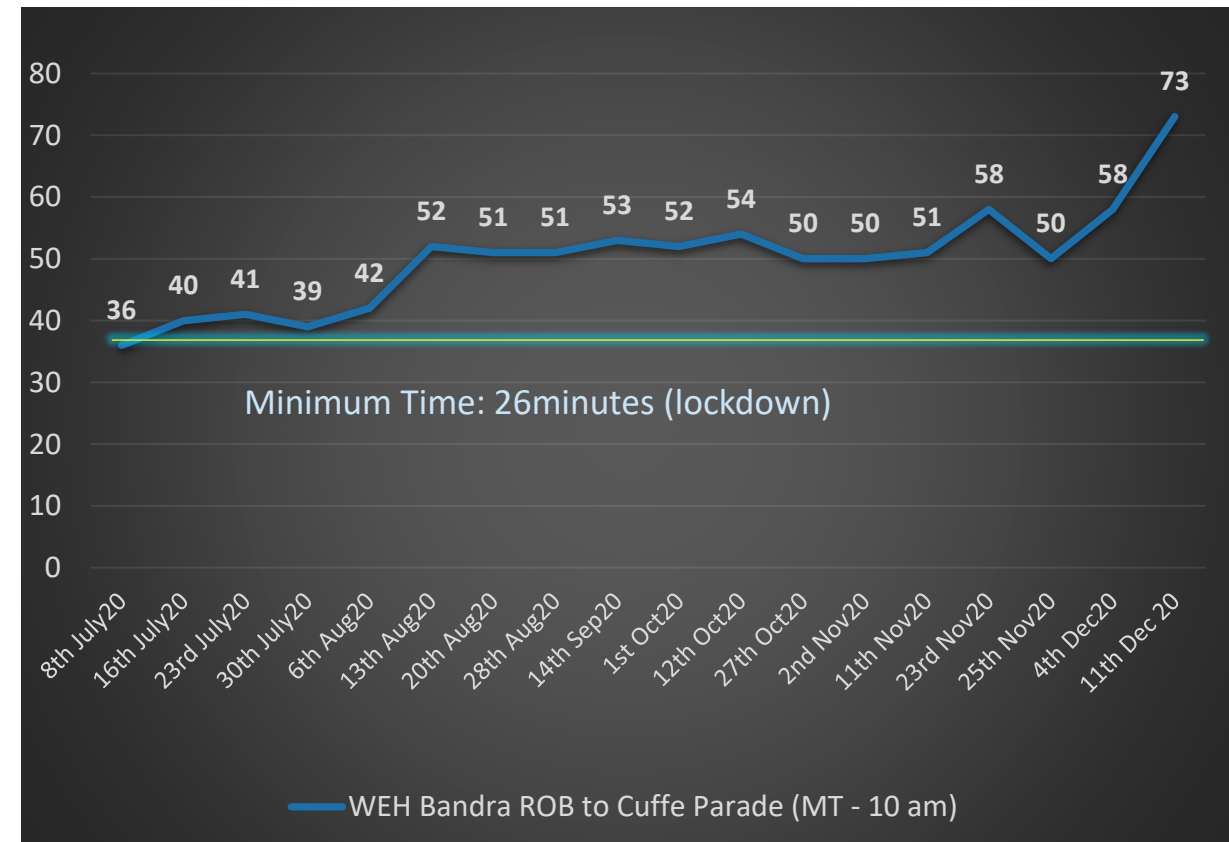- **65 Minutes – Maximum Time (January 2020)**

Mira Road to WEH Bandra ROB (MT - 10 am)
Data points: 65, 70, 61, 77, 76, 79, 73, 80, 89, 74, 100, 100, 96, 113, 96, 98, 92, 95
Minimum Time: 38 minutes (lockdown)

WEH Bandra ROB to Cuffe Parade (MT - 10 am)
Data points: 36, 40, 41, 39, 42, 52, 51, 51, 53, 52, 54, 50, 50, 51, 58, 50, 58, 73
Minimum Time: 26minutes (lockdown)

Exhibit 1B: 'Evening traffic' travel time in Mumbai is 91% - 114% of peak

LAQSHYA
MEDIA GROUP

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)
- 106 minutes – October (101% of max time)
- **117 minutes - November (111% 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)
- 54 minutes – October (83% of max time)
- **59 minutes – November (91% of max time)**
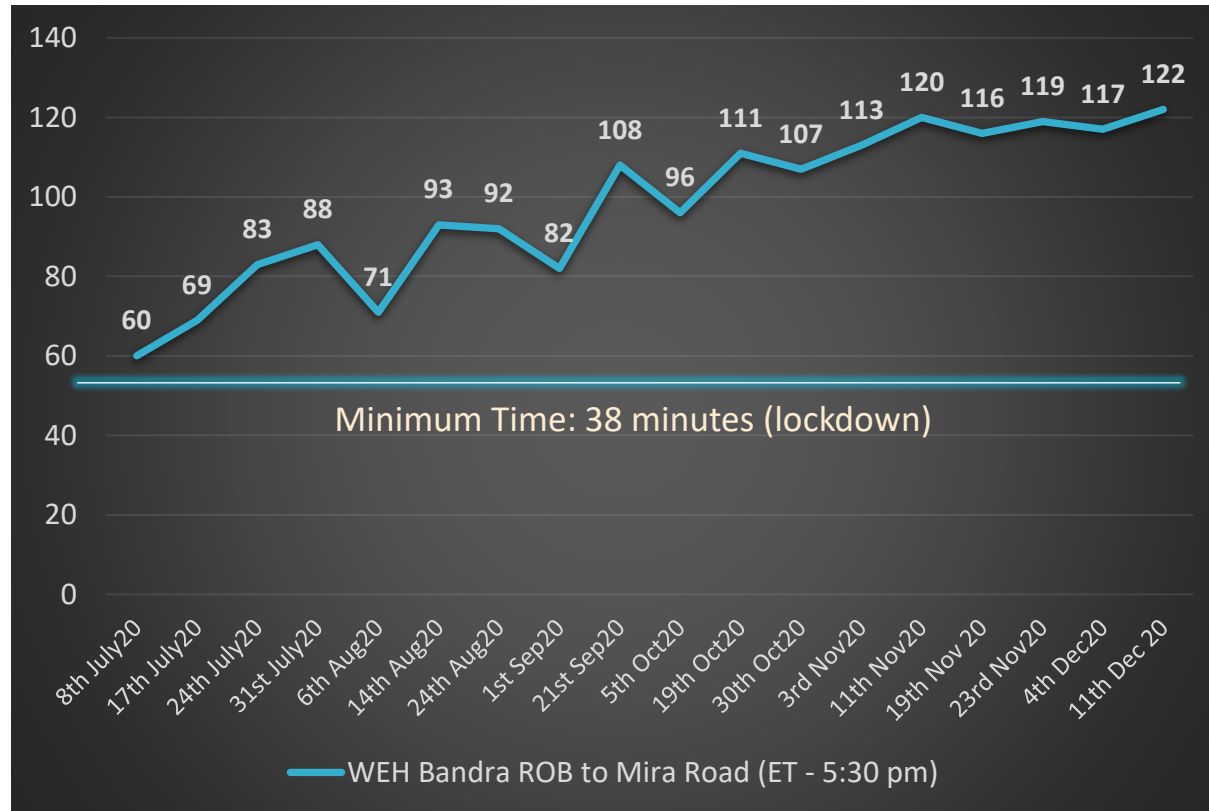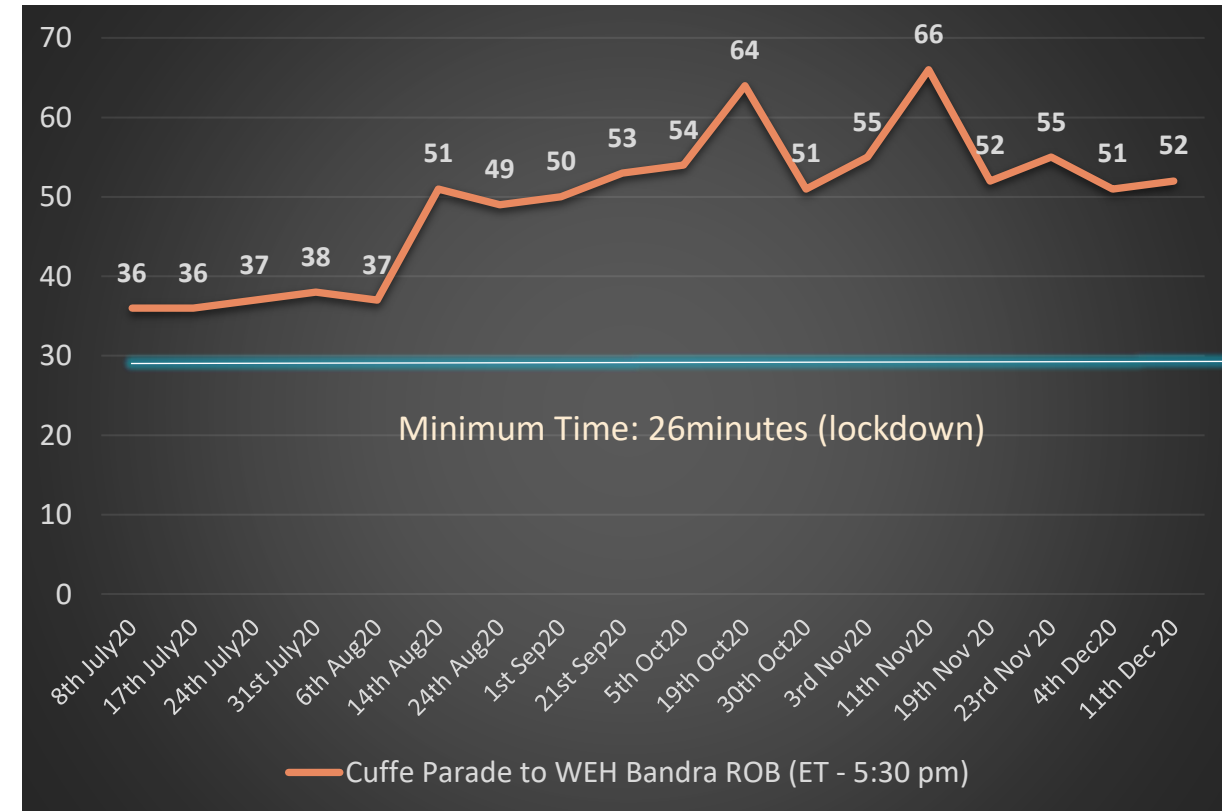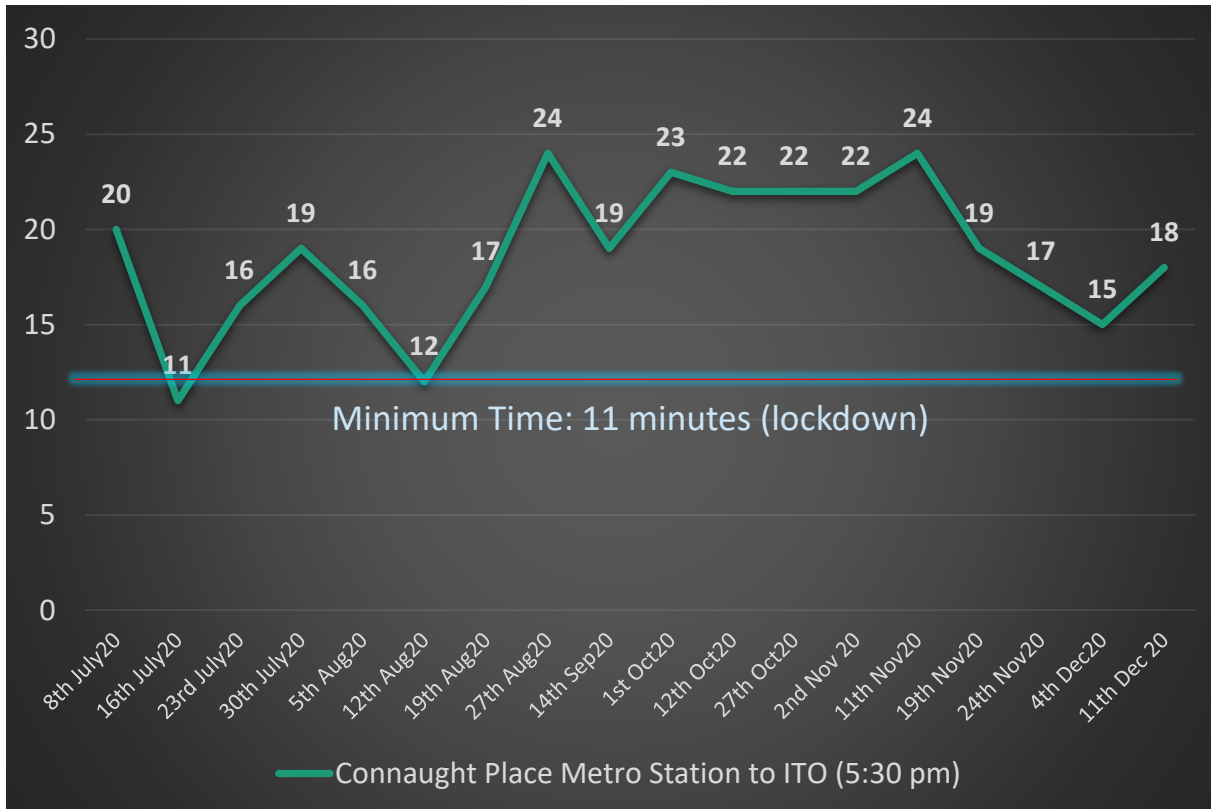- **65 Minutes – Maximum Time (January 2020)**

Minimum Time: 38 minutes (lockdown)

WEH Bandra ROB to Mira Road (ET - 5:30 pm)

Minimum Time: 26minutes (lockdown)

Cuffe Parade to WEH Bandra ROB (ET - 5:30 pm)

Exhibit 1C: Traffic in Delhi takes ~60 - 80% of peak travel times...

From Connaught Place Metro to ITO

- 11 minutes – Minimum (lockdown)
- 18 minutes – Early July
- 25 minutes – late August
- 20 minutes – September 3rd week
- 24 minutes – October (70% of max time)
- **22 minutes – November (60% of max time)**
- **38 Minutes – Maximum Time (January 2020)**

From Dhaula Kaun to NH8 Gurgaon Toll Plaza

- 30 minutes – Minimum (lockdown)
- 35 minutes – July
- 44 minutes – August
- 37 minutes – September
- 37 minutes – October (82% of max time)
- **36 minutes – November (80% of max time)**
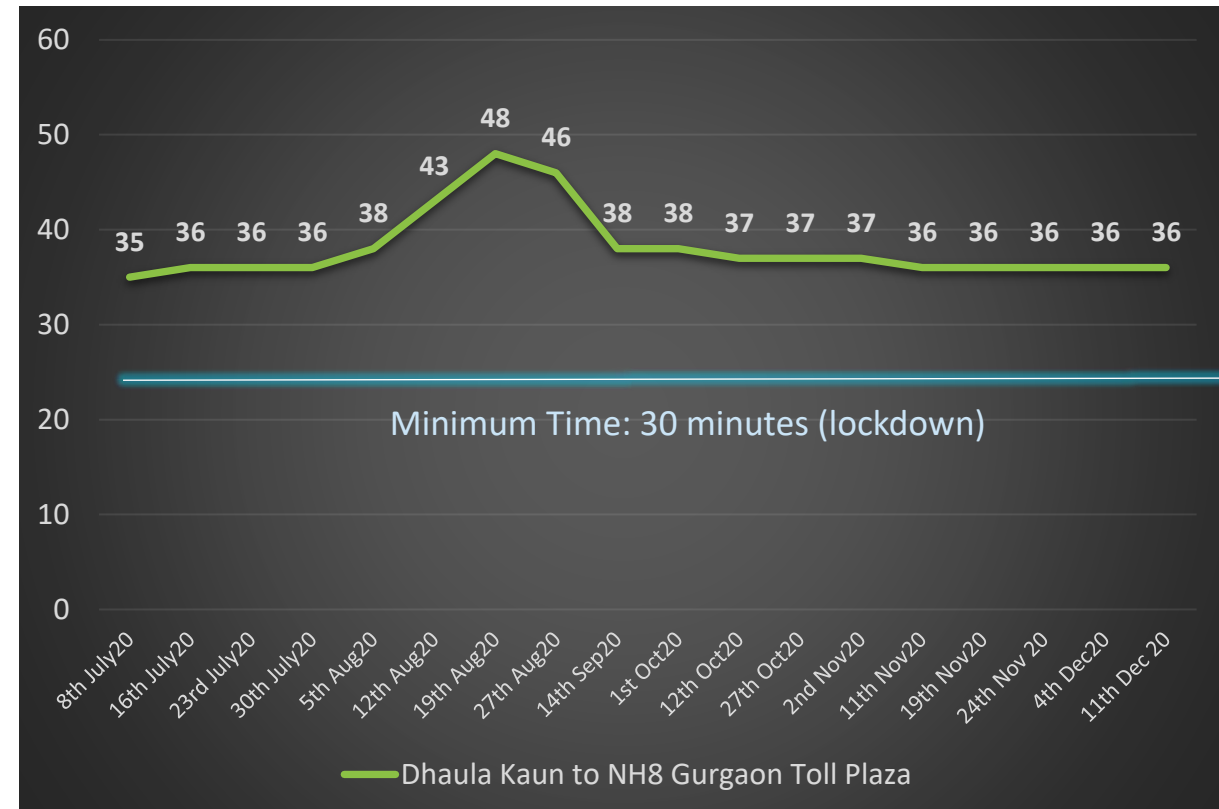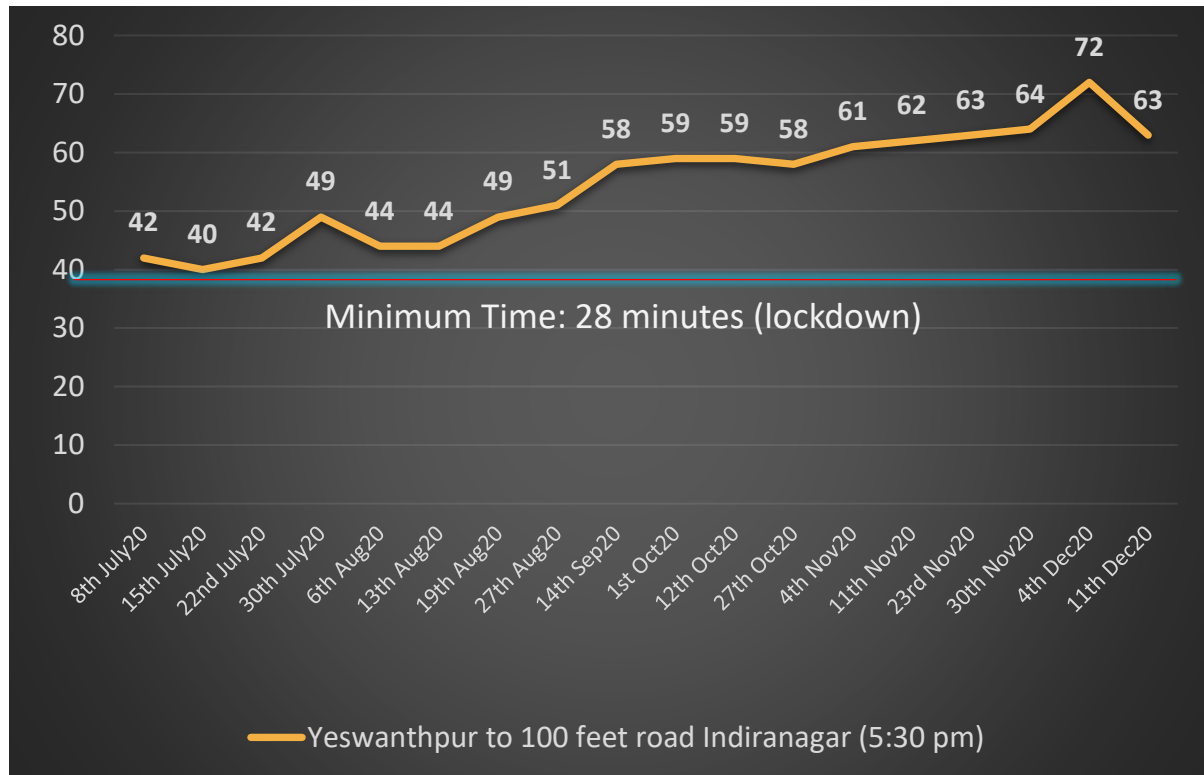- **45 Minutes – Maximum Time (January 2020)**

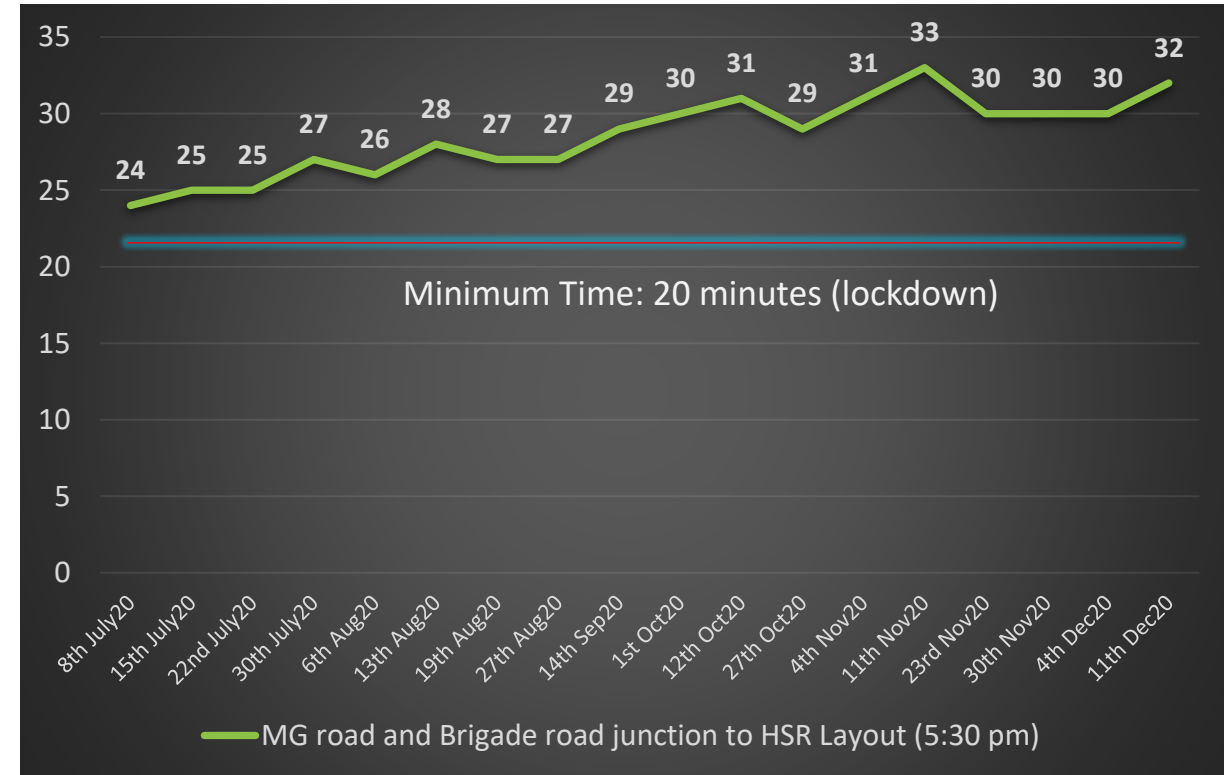# Exhibit 1D: Bengaluru travel times are ~91 to 97% of peak times

From Yeshwanthpur to Indiranagar

- 28 minutes – Minimum (lockdown)
- 44 minutes – Early July
- 53 minutes – late August
- 58 minutes – late September (90% of max time)
- 59 minutes – October (91% of max time)
- **63 minutes – November (96% 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)
- 31 minutes – October (91% of max time)
- **31 minutes – November (91% of max time)**
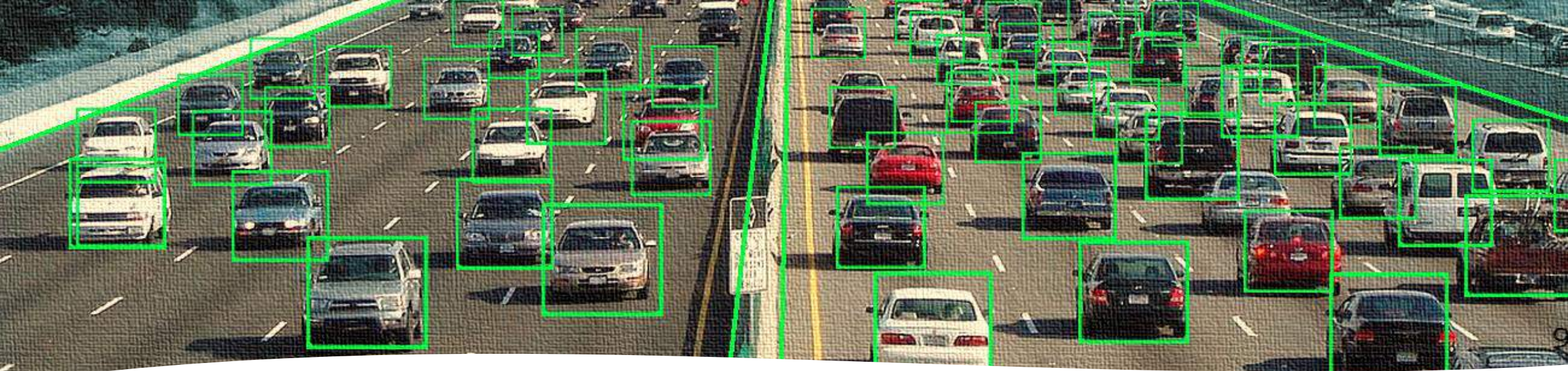- **34 Minutes – Maximum Time (January 2020)**

Minimum Time: 28 minutes (lockdown)

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

Minimum Time: 20 minutes (lockdown)

—— 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 – Mumbai now has 97+% traffic with long dwell times in traffic…

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 **98% of the peak** of October 2019.

At the **Bandra Turner Road Crossing**, human traffic is **96% of the peak** of pre-Diwali numbers in 2019.

WEH Jog Flyover, Andheri, Mumbai
Peak Traffic: 251,260

100% 67% 72% 74% 78% 79% 84% 86% 90% 93% 95% 96% 98% 98%

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, 07-Oct-20, 23-Oct-20
09-Nov-20, 25-Nov-20, 04-Dec-20, 11-Dec-20

Bandra Turner Road Crossing
Peak Traffic: 76,269

100% 73% 73% 76% 74% 77% 82% 85% 88% 92% 93% 94% 95% 96%

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, 07-Oct-20, 23-Oct-20
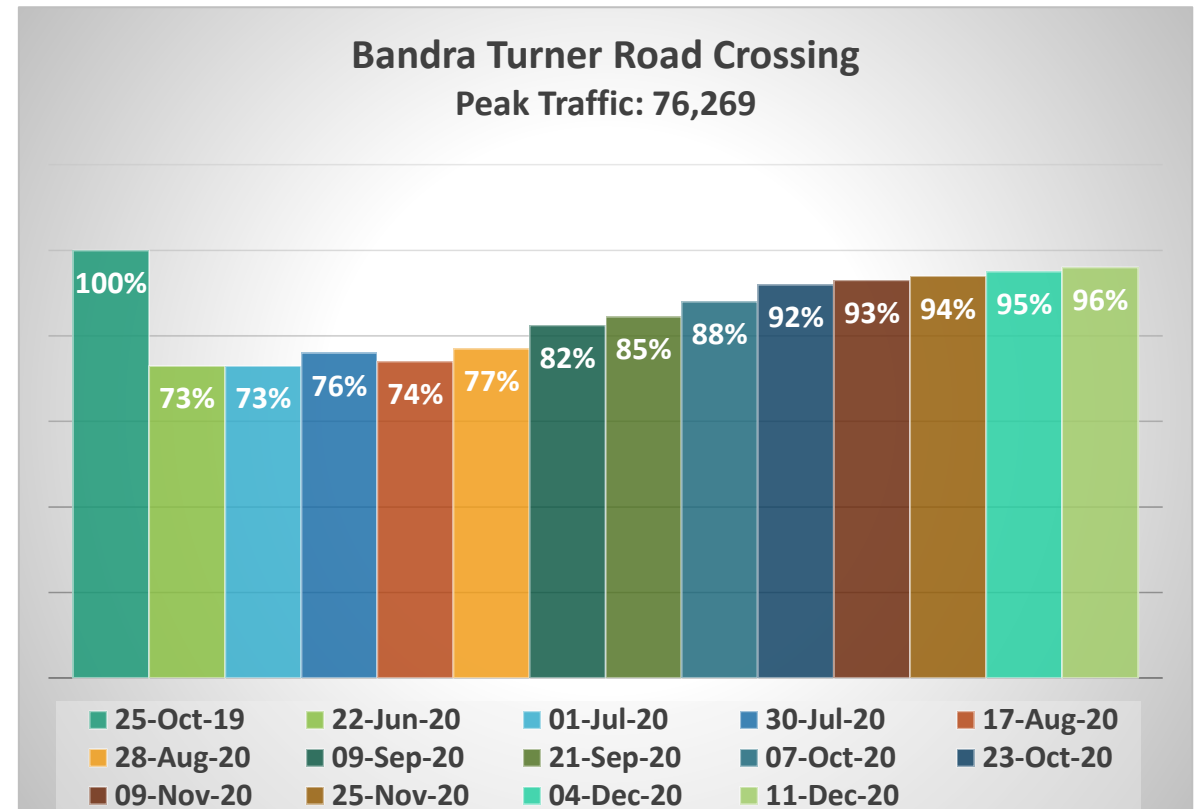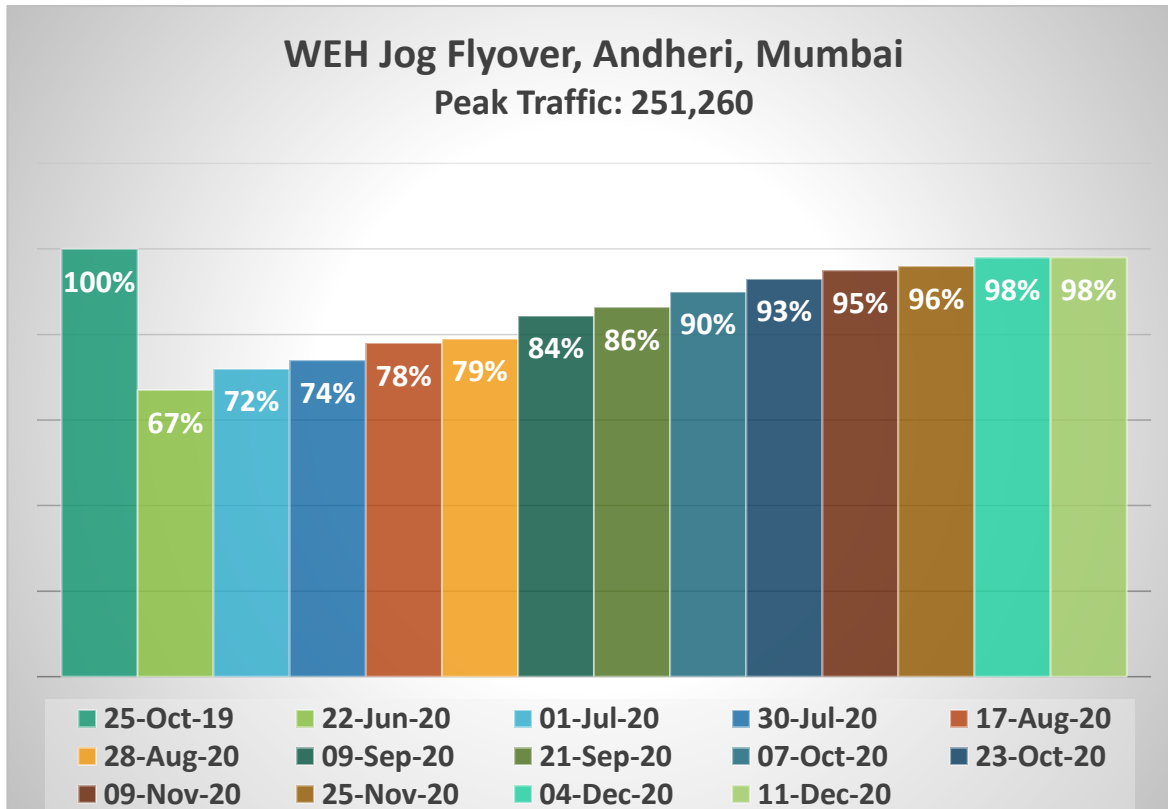09-Nov-20, 25-Nov-20, 04-Dec-20, 11-Dec-20

Exhibit 2B – Delhi with ~93% people saw a huge surge in traffic pre-Diwali

A very busy Diwali was followed with a slight drop in overall traffic towards the end of the month due to spurt in cases post Diwali

At the famous **ITO Crossing,** human traffic (people in vehicles, on 2-wheelers plus pedestrians) is at **93%** 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 **93%** of Peak traffic (pre-Diwali, 2019).

ITO Crossing, Delhi
Peak Traffic: 177,895

Values: 100%, 66%, 69%, 79%, 83%, 84%, 88%, 88%, 91%, 93%, 97%, 90%, 93%, 93%

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
- 07-Oct-20
- 23-Oct-20
- 09-Nov-20
- 25-Nov-20
- 04-Dec-20
- 11-Dec-20

NH8 - Gurugram Toll Plaza, Delhi
Peak Traffic: 220,550

Values: 100%, 59%, 67%, 76%, 82%, 85%, 88%, 90%, 92%, 95%, 98%, 93%, 94%, 93%

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
- 07-Oct-20
- 23-Oct-20
- 09-Nov-20
- 25-Nov-20
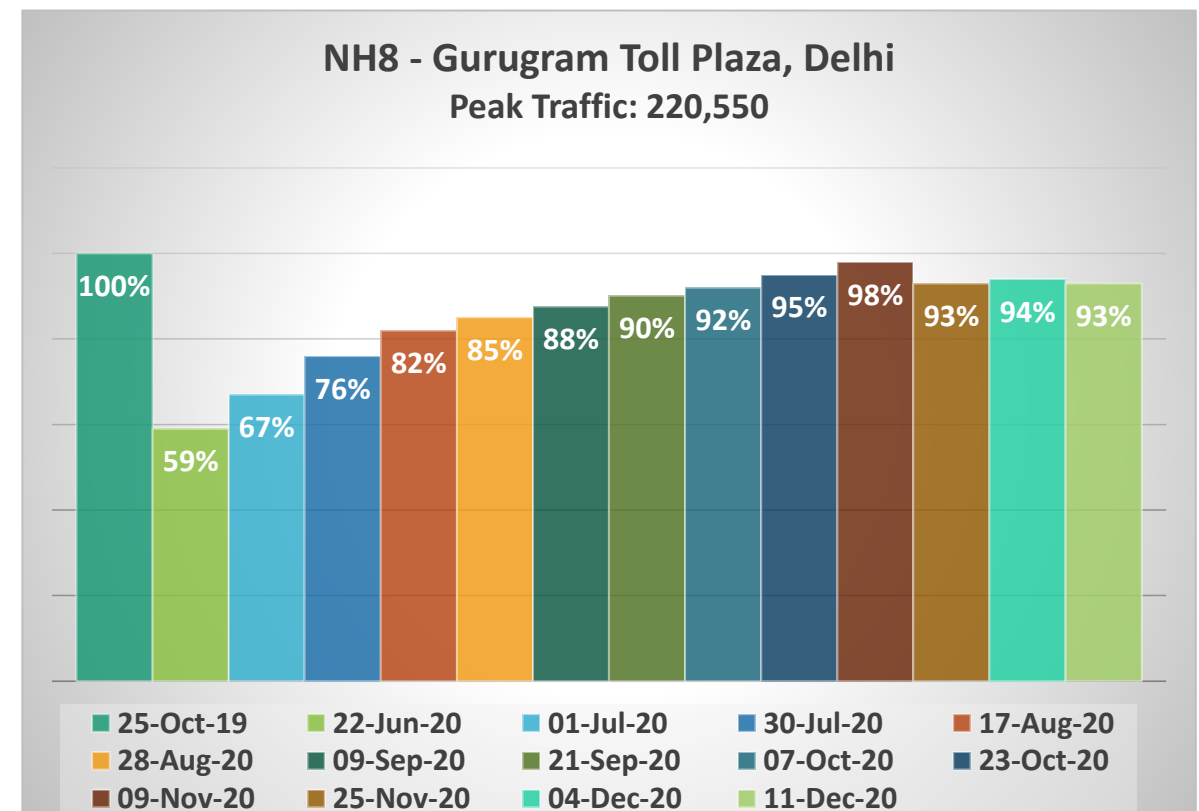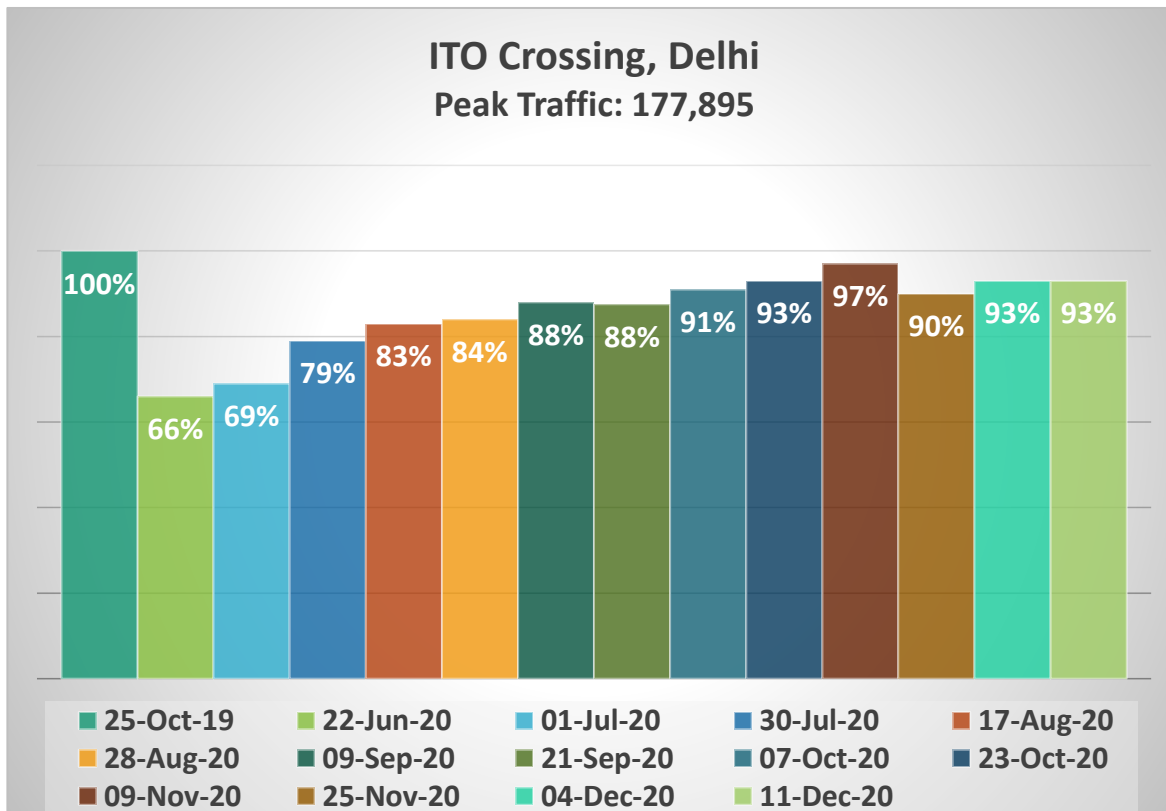- 04-Dec-20
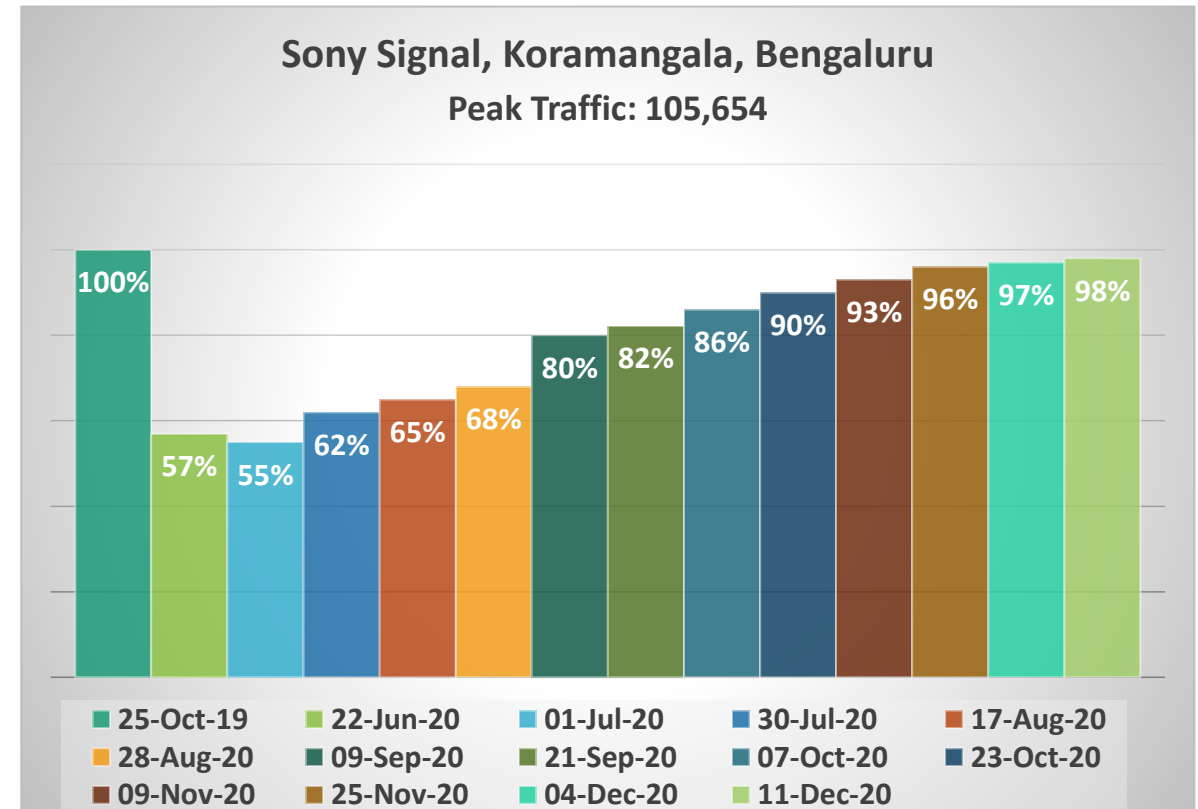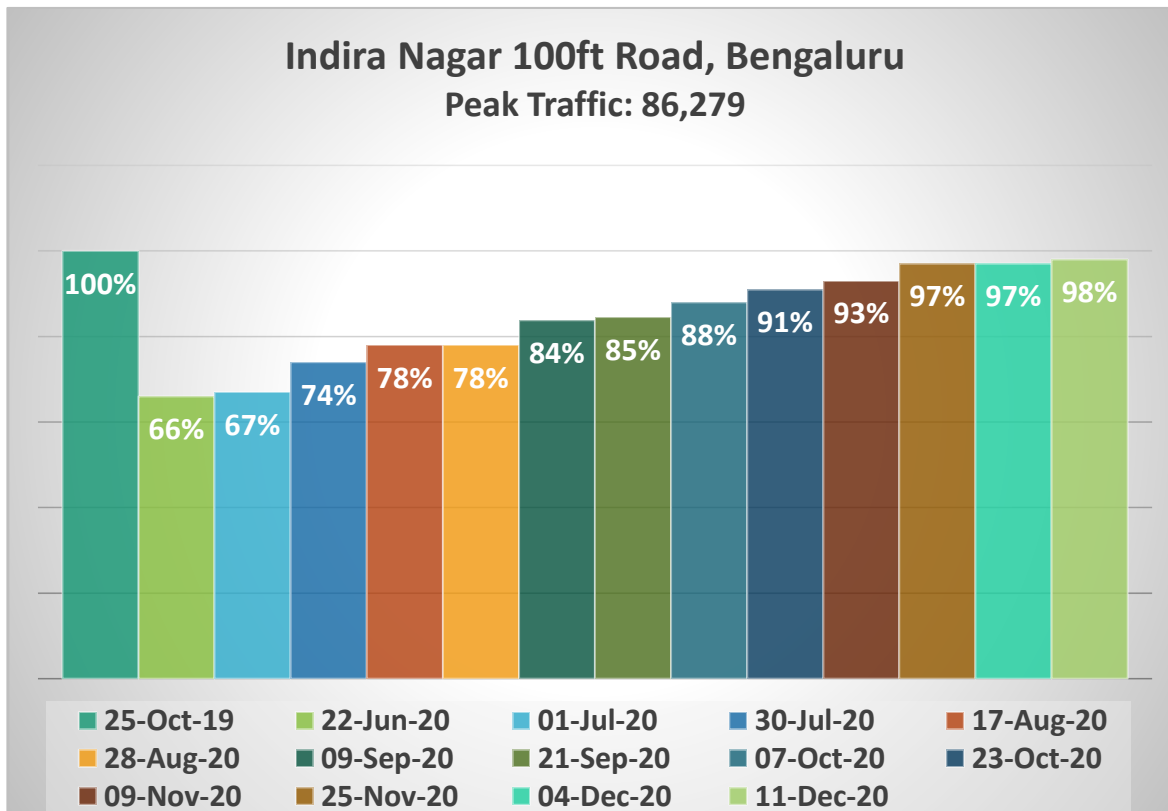- 11-Dec-20

LAQSHYA
MEDIA GROUP

Exhibit 2C – Bengaluru has seen a consistent growth in overall traffic numbers to reach 98+%

Traffic recovery in Bengaluru has now happened with 95% of the consumers back on the roads...

On the 100ft Road in **Indira Nagar**, human traffic (people in vehicles, on 2-wheelers plus pedestrians) is at **98%** of the super-peak pre-Diwali traffic of 2019.

Around the IT-industry hub of **Koramangala,** human traffic is 'only' **98%** of the pre-Diwali peak of 2019.

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

100% 66% 67% 74% 78% 78% 84% 85% 88% 91% 93% 97% 97% 98%

■ 25-Oct-19	■ 22-Jun-20	■ 01-Jul-20	■ 30-Jul-20	■ 17-Aug-20
■ 28-Aug-20	■ 09-Sep-20	■ 21-Sep-20	■ 07-Oct-20	■ 23-Oct-20
■ 09-Nov-20	■ 25-Nov-20	■ 04-Dec-20	■ 11-Dec-20	

Sony Signal, Koramangala, Bengaluru
Peak Traffic: 105,654

100% 57% 55% 62% 65% 68% 80% 82% 86% 90% 93% 96% 97% 98%

■ 25-Oct-19	■ 22-Jun-20	■ 01-Jul-20	■ 30-Jul-20	■ 17-Aug-20
■ 28-Aug-20	■ 09-Sep-20	■ 21-Sep-20	■ 07-Oct-20	■ 23-Oct-20
■ 09-Nov-20	■ 25-Nov-20	■ 04-Dec-20	■ 11-Dec-20	

Sales numbers continued to rise in the festive period...
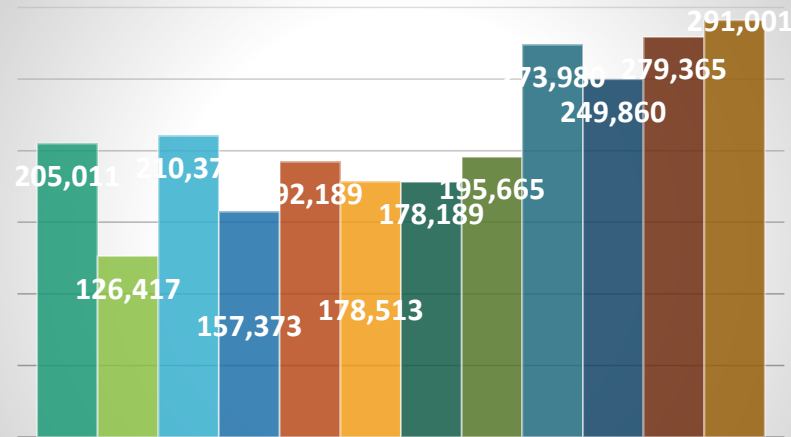
- Between June and November 2020, people in India bought: 60.3+ lakh 2-Wheelers, 11.98+ lakh Passenger Vehicles and 3.61+ lakh Tractors (Source: FADA)

- Overall, passenger vehicle sales have gone from 62% (June 20 vs June 19) to ~104% (Nov 20 vs Nov 19)

- Tractor sales for June to November 2020 are 135% as compared to the corresponding period in 2019
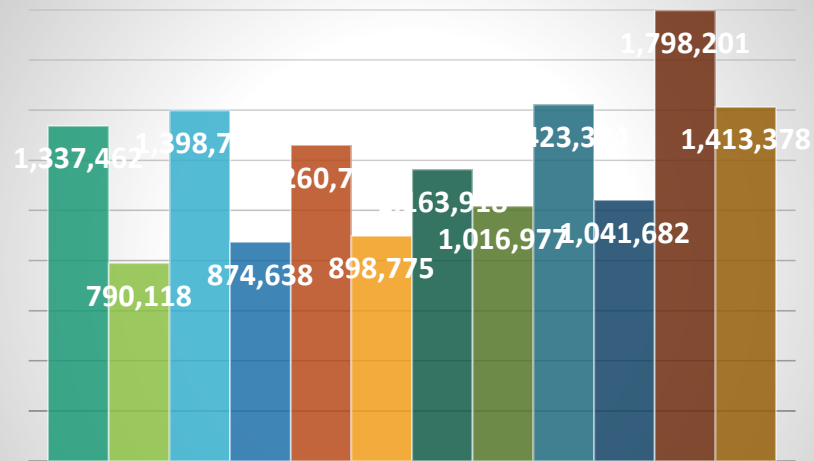
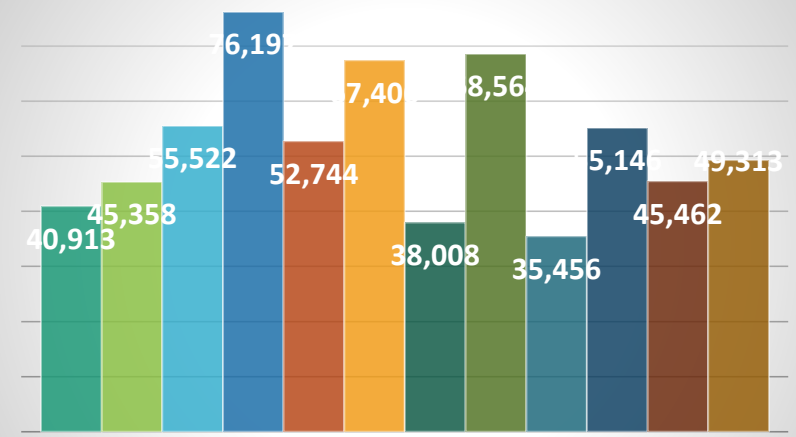# The lockdown period was great for ecommerce:

- **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**.[#]

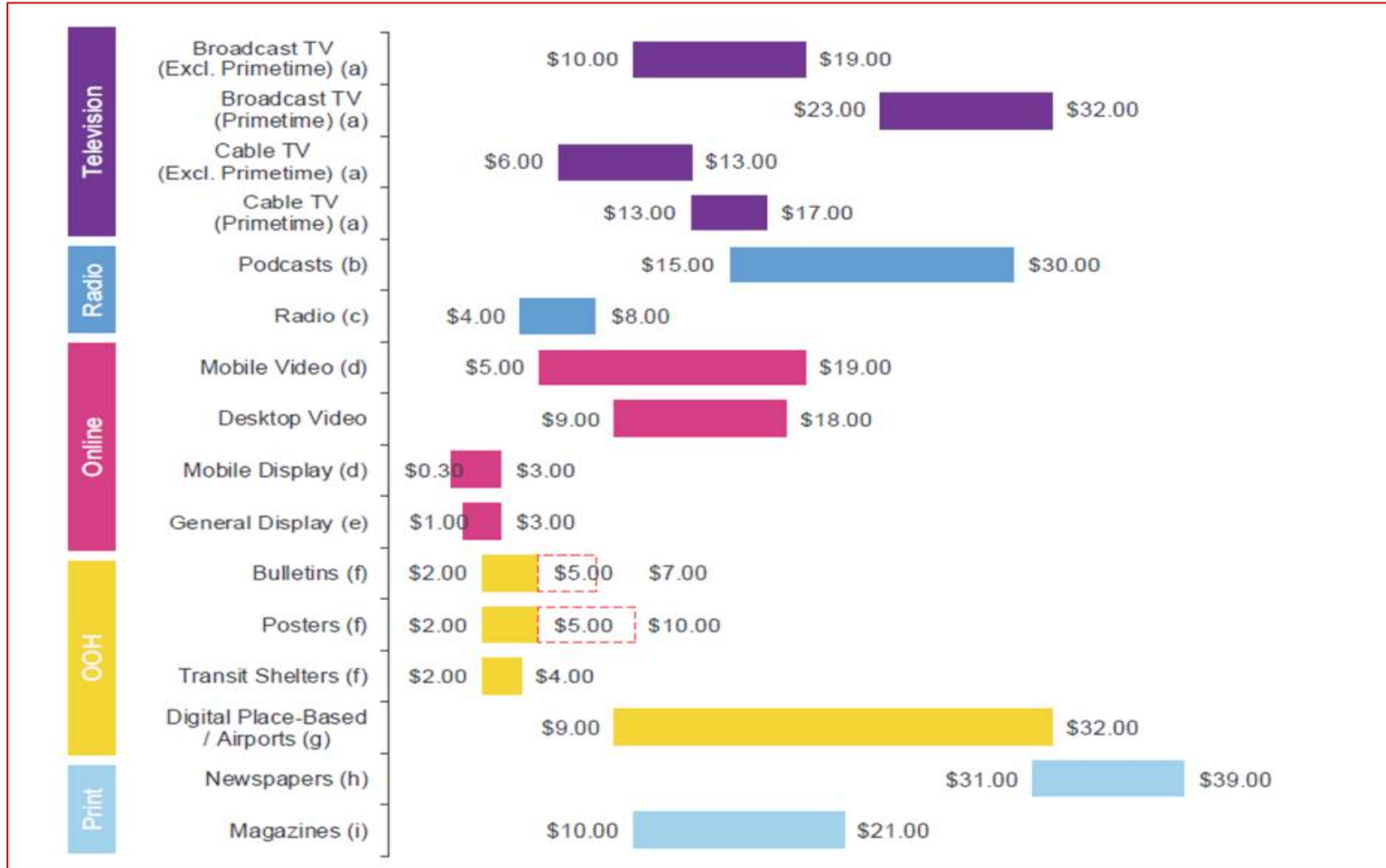## How can this growth be sustained?

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

In the post-lockdown period, where should the advertisement budgets go?
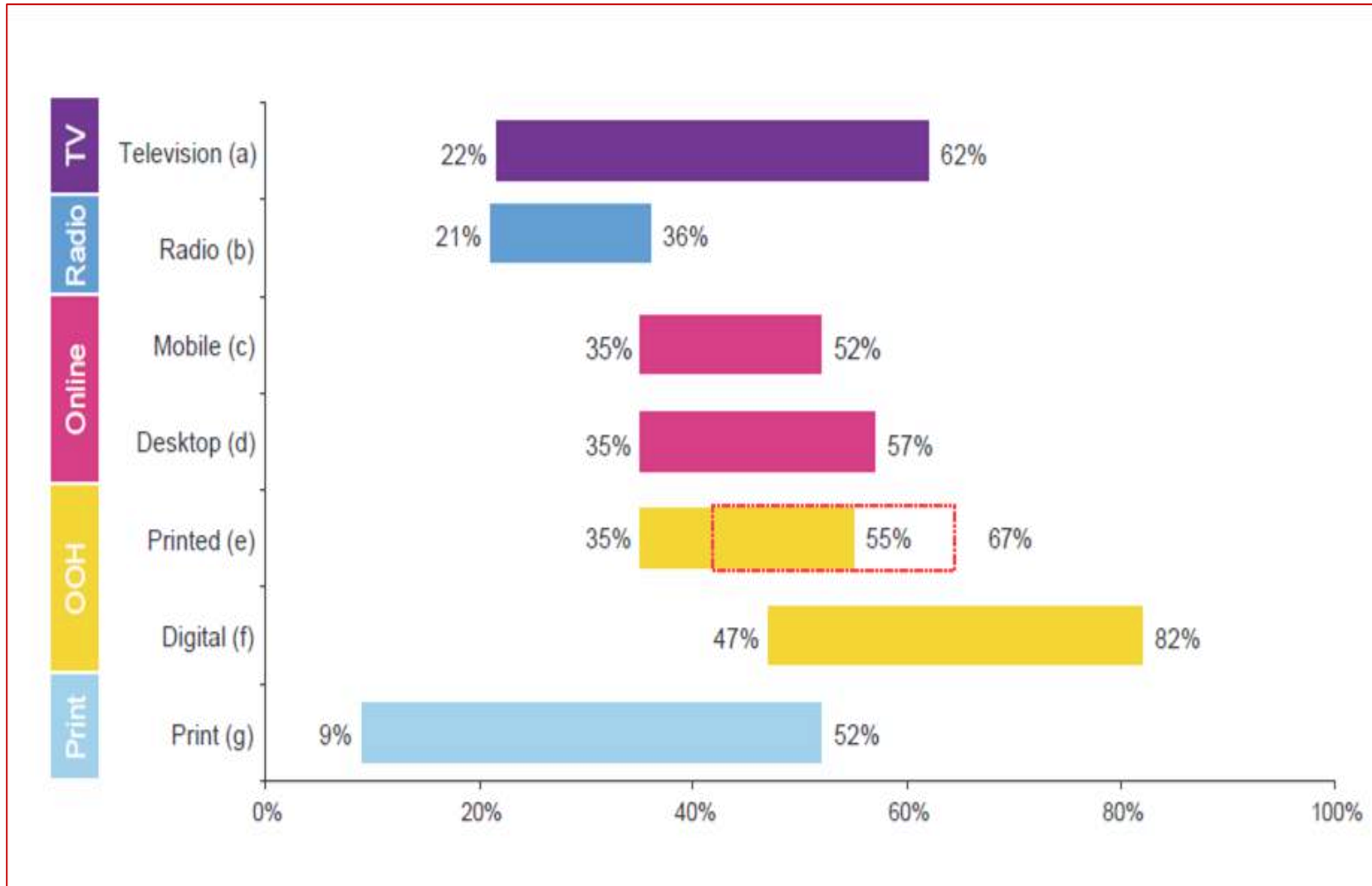
A comparison of media costs and effectiveness

For retail and ecommerce marketers

LAQSHYA
MEDIA GROUP

Invest in media where cost is low…

PJ SOLOMON
US MAJOR
MEDIA CPM
COMPARISON

Category	Medium	Low	High
Television	Broadcast TV (Excl. Primetime) (a)	$10.00	$19.00
Television	Broadcast TV (Primetime) (a)	$23.00	$32.00
Television	Cable TV (Excl. Primetime) (a)	$6.00	$13.00
Television	Cable TV (Primetime) (a)	$13.00	$17.00
Radio	Podcasts (b)	$15.00	$30.00
Radio	Radio (c)	$4.00	$8.00
Online	Mobile Video (d)	$5.00	$19.00
Online	Desktop Video	$9.00	$18.00
Online	Mobile Display (d)	$0.30	$3.00
Online	General Display (e)	$1.00	$3.00
OOH	Bulletins (f)	$2.00	$7.00 ($5.00)
OOH	Posters (f)	$2.00	$10.00 ($5.00)
OOH	Transit Shelters (f)	$2.00	$4.00
OOH	Digital Place-Based / Airports (g)	$9.00	$32.00
Print	Newspapers (h)	$31.00	$39.00
Print	Magazines (i)	$10.00	$21.00

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
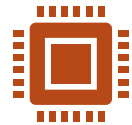
Data-driven marketing is more effective today than ever before

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!

LAQSHYA
MEDIA GROUP

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, **Laqshya 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

LAQSHYA
MEDIA GROUP