

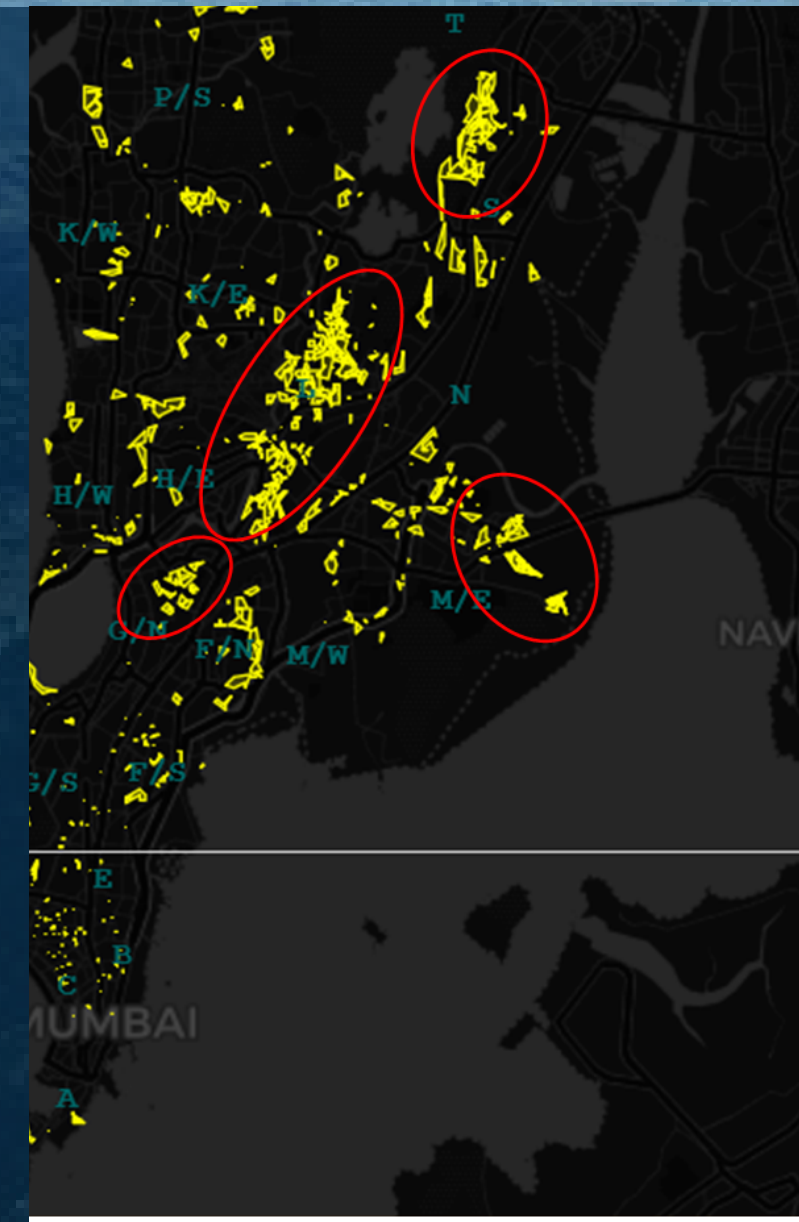
**Containment zones *cannot*
contain the *enthusiasm* of
Indians and Indian businesses!**

June 10, 2020

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Executive Summary

- **Unlock 1.0** came into effect on the 3rd of June across cities in India.
- **Specific containment zones** were created where business activities are limited to essential services. The size and demographics of population in these containment zones has not been stated.
- Businesses are trying to estimate the loss of opportunity because of these containment zones. ***This study seeks to help businesses estimate this loss of opportunity***
- ***SHARP and a selection of other databases were used*** to estimate the size and socio-economic attributes of population living in the containment zones – this process indicated that NCCS D and NCCS E segments compose the primary populations in most containment zones.
- This ***study thus looks at a simulation to estimate the opportunity cost*** if the entire NCCS D&E populations of the top 8 cities were placed in the CZs
- NCCS D&E populations are ~15% of the metro population but have just over 6% of the purchasing power in the metros.
- This ~6% does adds up to ~Rs. 5000 crores across the cities – but most of this is reportedly spent on Foodstuff/FMCG and Housing
- ***Traffic on the roads is fast setting back to normal. Brands must engage with their TG NOW!***

Unlock 1.0



Good News

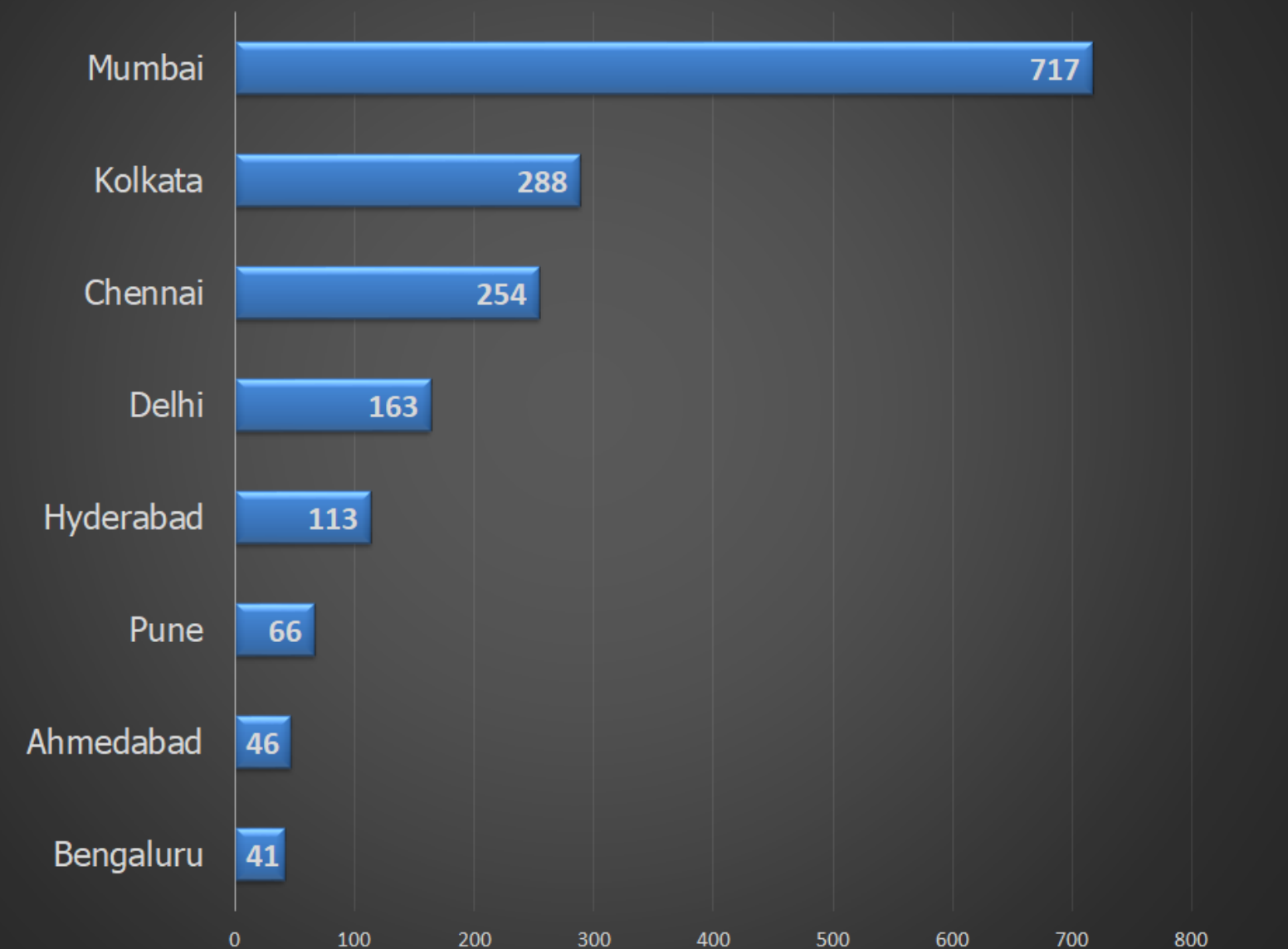


India has started to open up... Apart from small containment zones.

Can containment zones cause significant business loss?

That is the subject of our current study.

Number of Containment Zones as of June 1st week 2020



A sample representation of the containment zones of Mumbai, Delhi & Chennai follows



MUMBAI



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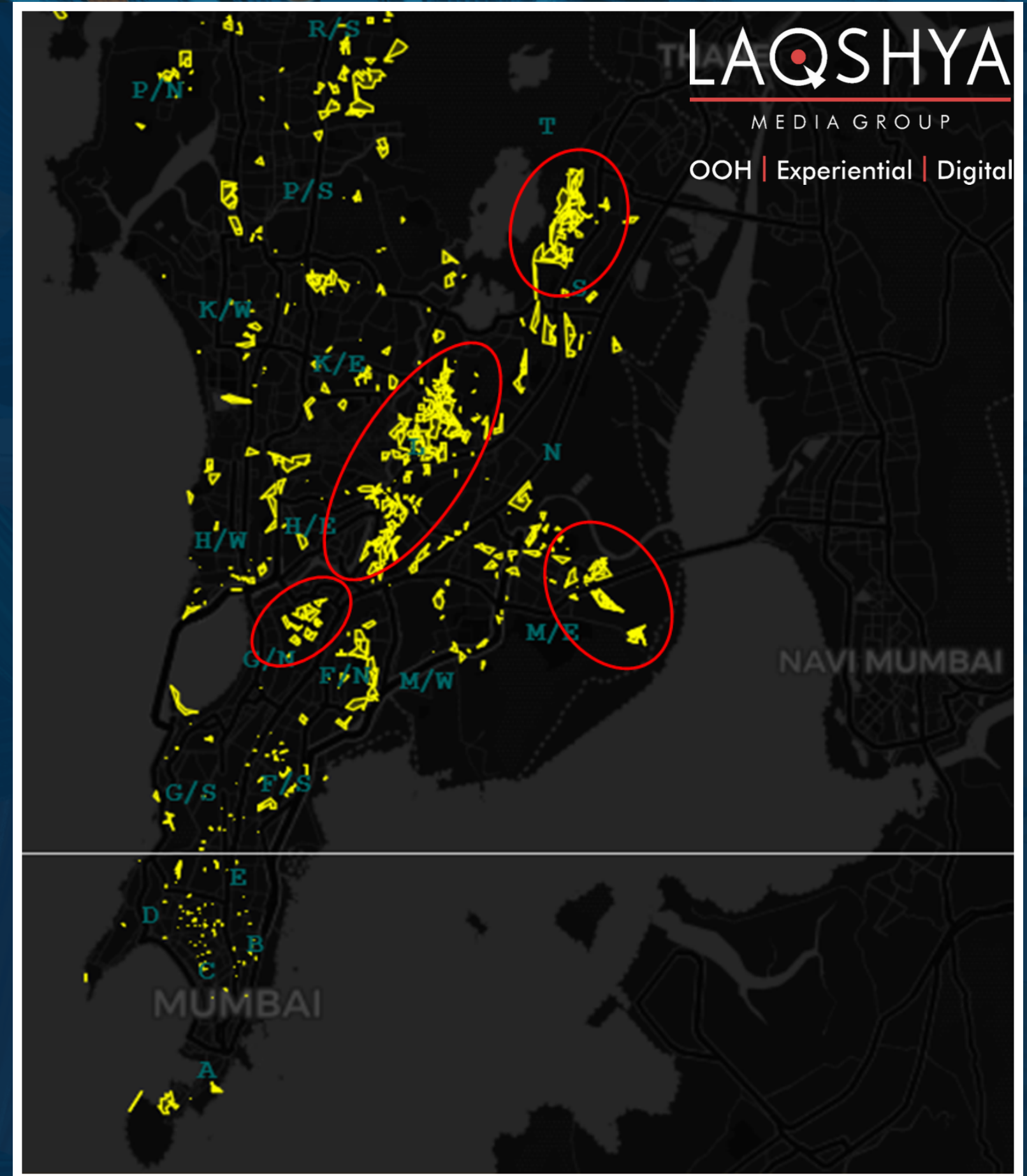
- This map of Mumbai illustrates the number and spread of containment zones. →

- **Number of containment zones in Mumbai = 717**

- Large concentration is observed in *areas that are among the economically less-affluent parts of the city.*



Dharavi
Govandi
Kurla West
Saki Naka
Nahur
Bhandup



Source: MCGM - <https://stopcoronavirus.mcgm.gov.in/insights-on-map>

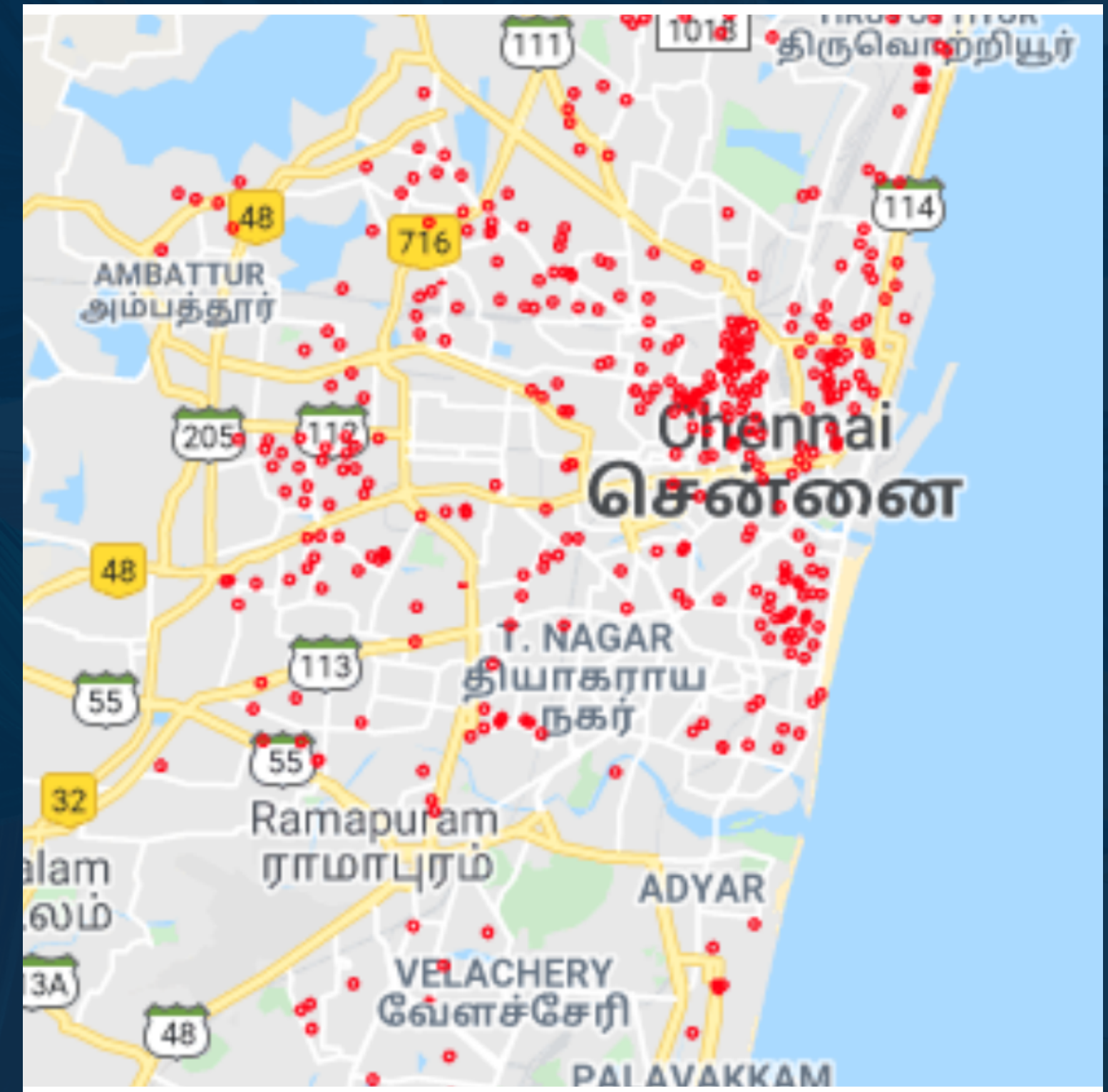
CHENNAI

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- **Number of containment zones in Chennai = 254**

- There are diminutive zones in various parts of the city
- However, the key concentration lies in the northern part of Chennai



Source - <https://www.covidhotspots.in/>

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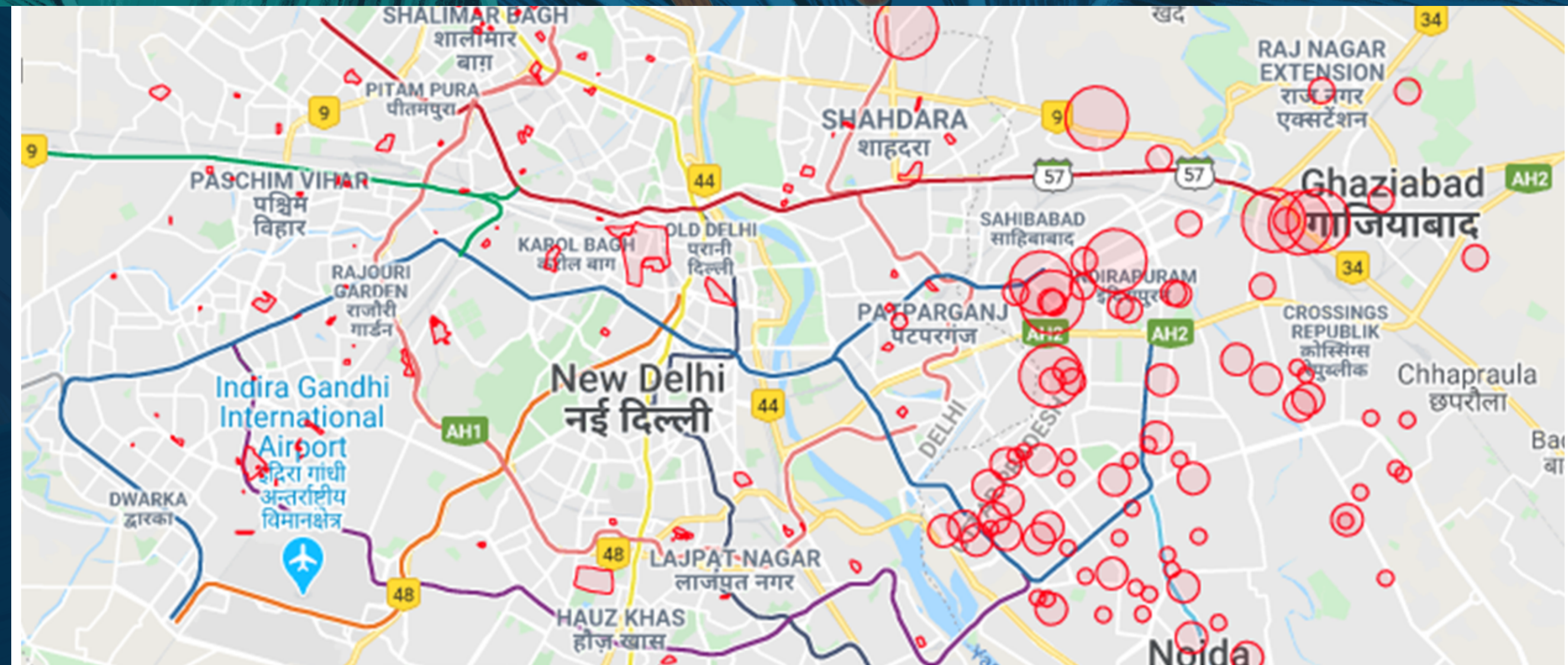
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DELHI 



- A significant number are present in the eastern and north eastern parts of Delhi.

- *These are the economically low-affluence parts of the Delhi NCR region.*



Source - <https://www.covidhotspots.in/>



- **Number of containment zones in Delhi = 163**

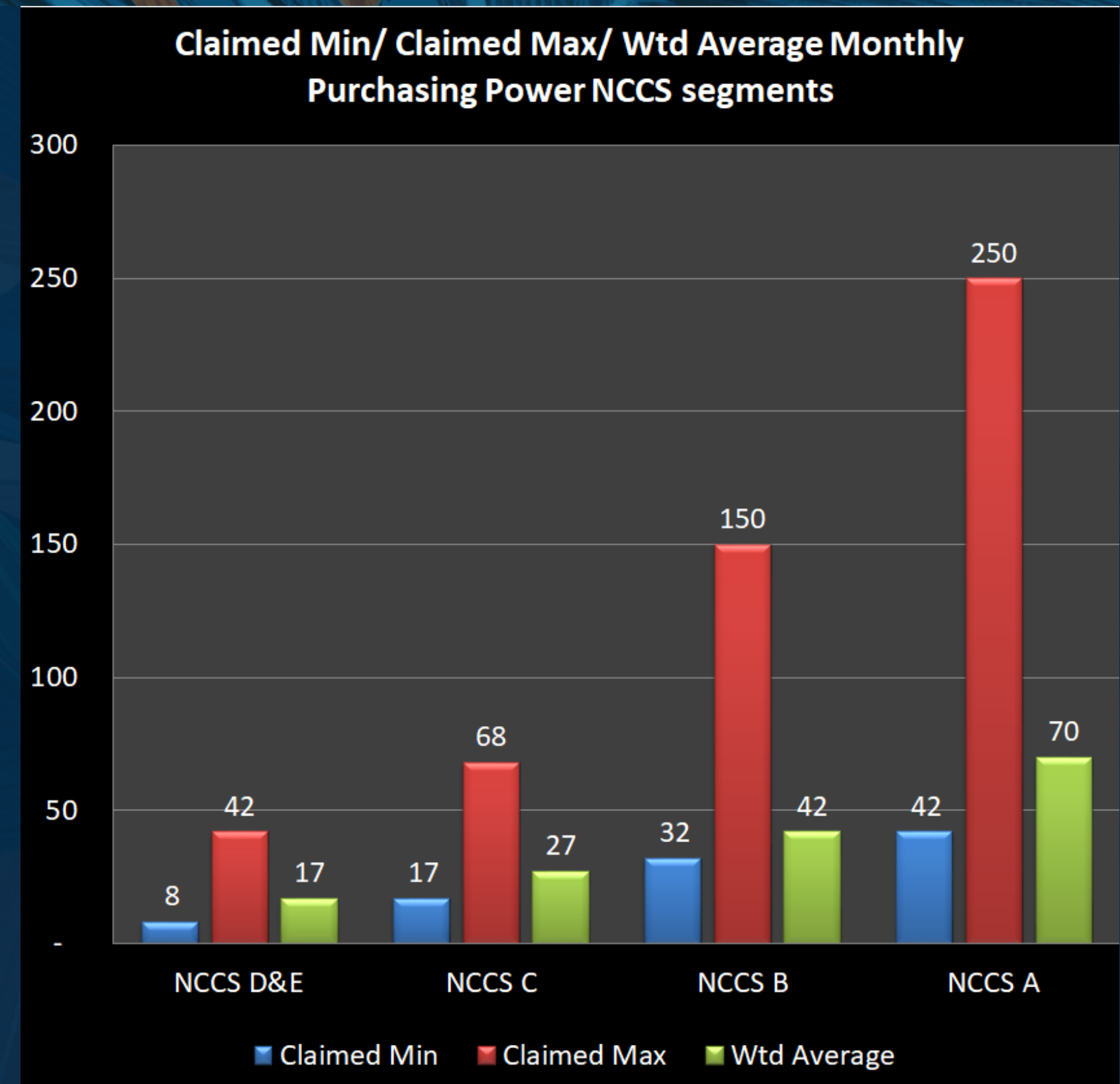
✓ There is no accurate count of the **population** in the **containment zones**.

✓ The **containment areas**, as per **Laqshya Media's SHARP**, are the **hubs for NCCS D&E population segments**.

✓ To estimate the extent of loss of business from the containment zones, this study estimates the loss to business if **the entire NCCS D&E population** were placed **in containment zones**.

Estimate of Purchasing Power Range across NCCS segments

- The range of purchasing power was estimated for each NCCS segment, using a combination of updated data from:
 - www.censusindia.gov.in, MRUC, Kantar's TGI and www.smartcities.gov.in combination with www.sharp.laqshyagroup.com
 - A dipstick was conducted across 8 cities; minimum 30 respondents from each NCCS segment

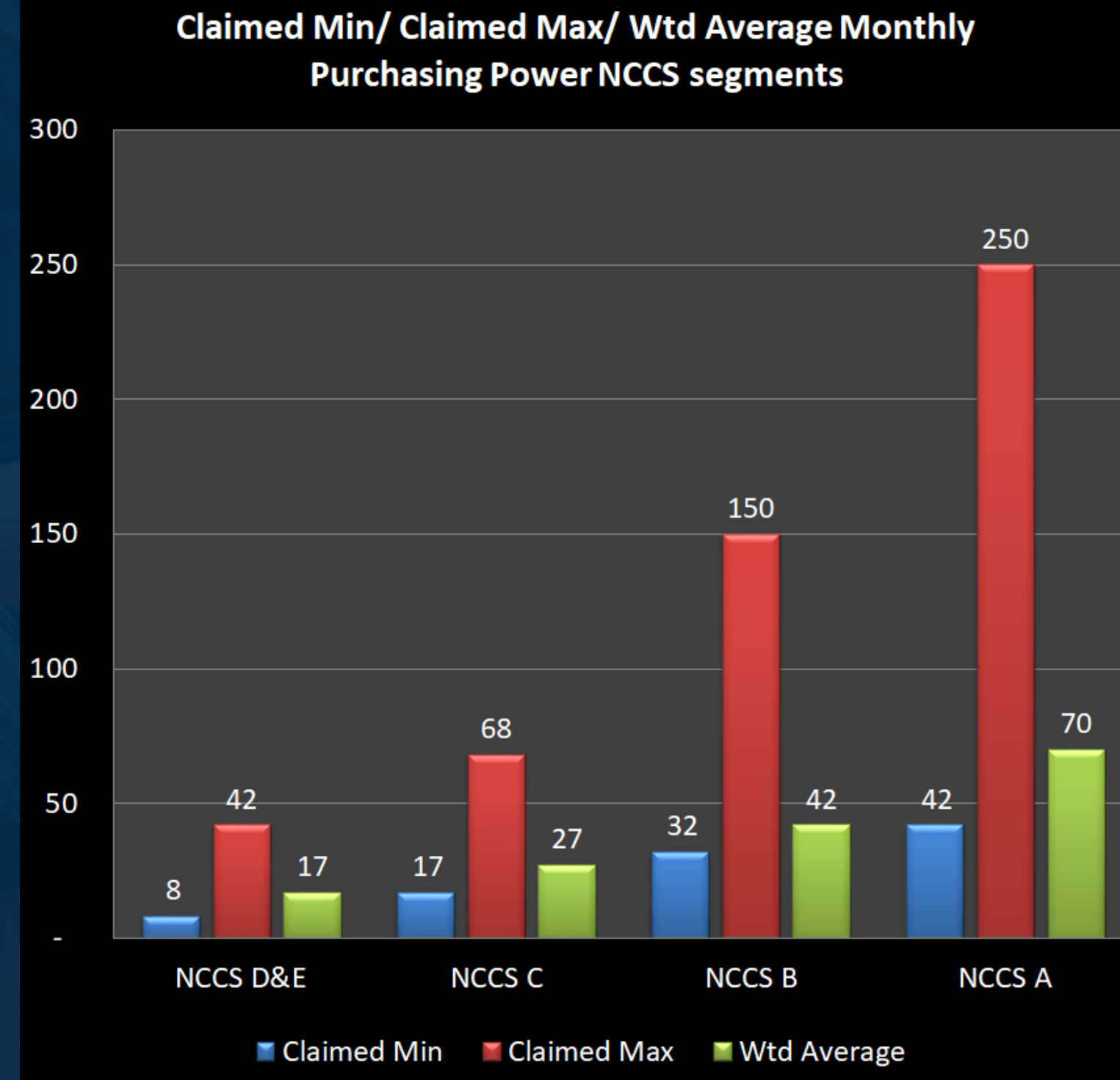


NCCS D&E – Rs. 17k per month
Range of 8k-42k per month

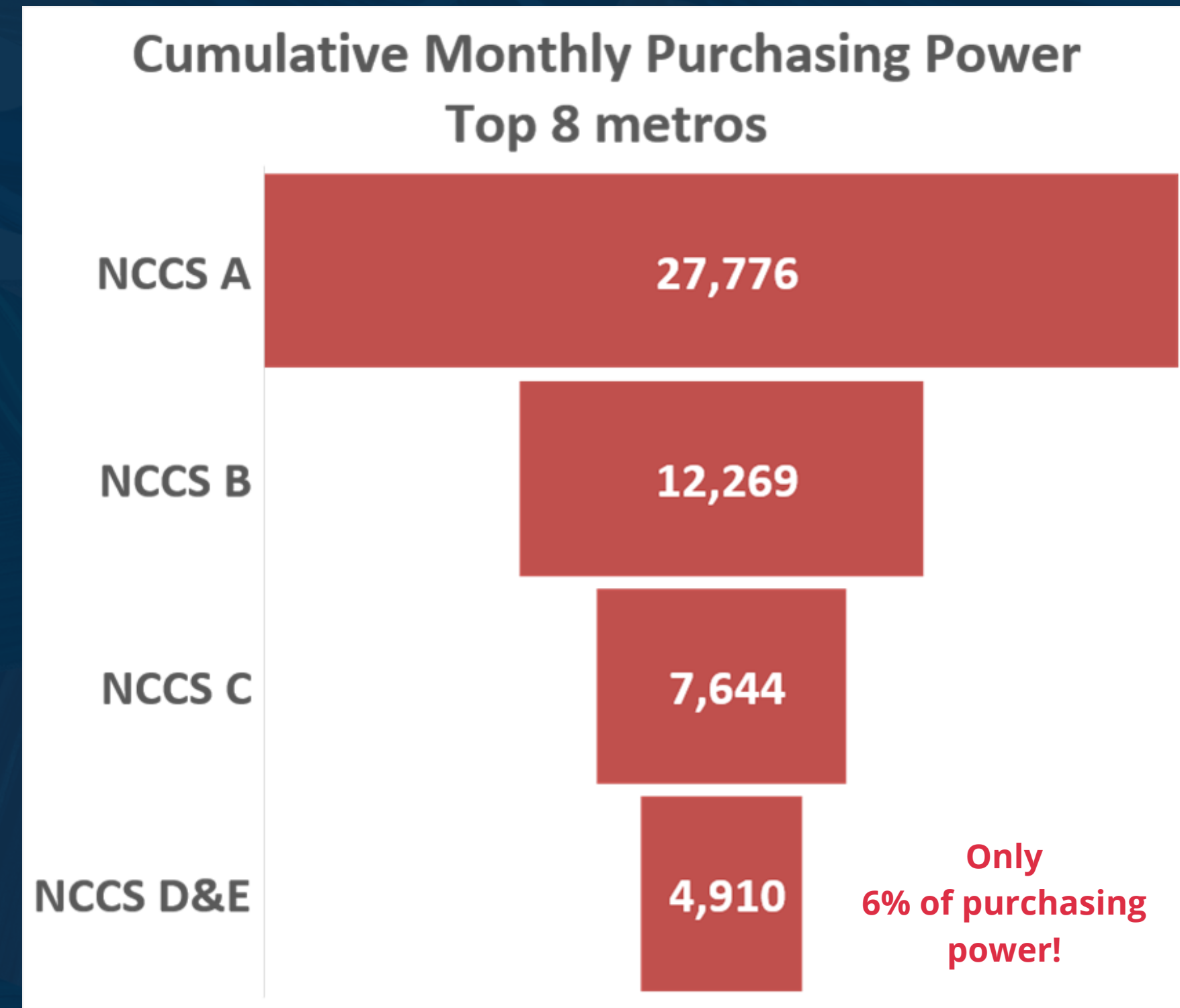
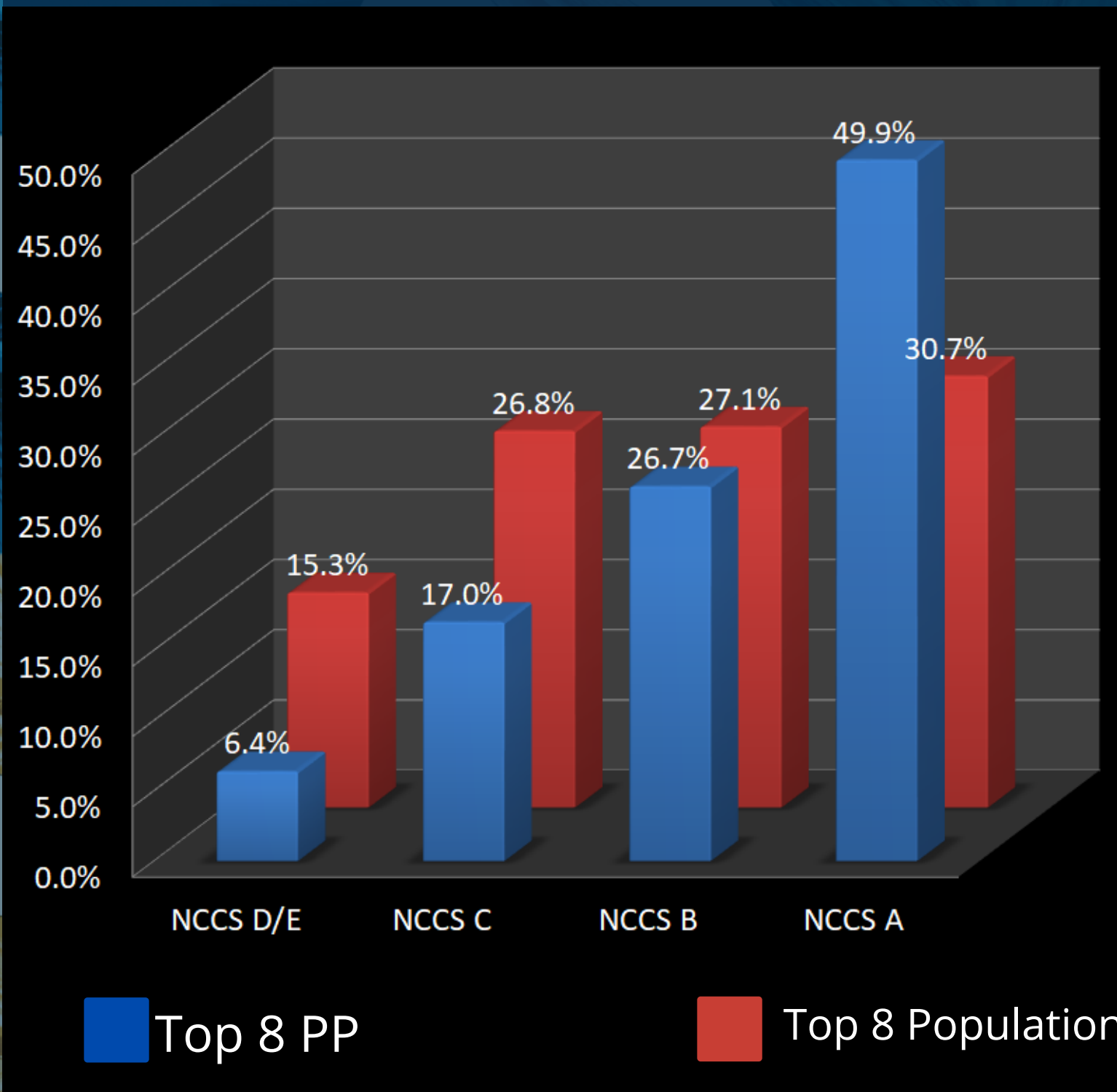
NCCS C – Rs. 27k per month
Range of 17k – 68K per month

NCCS B – Rs. 42k per month
Range of 32k-150k per month

NCCS A – Rs. 70k per month
Range of 42k to 250k+ per month

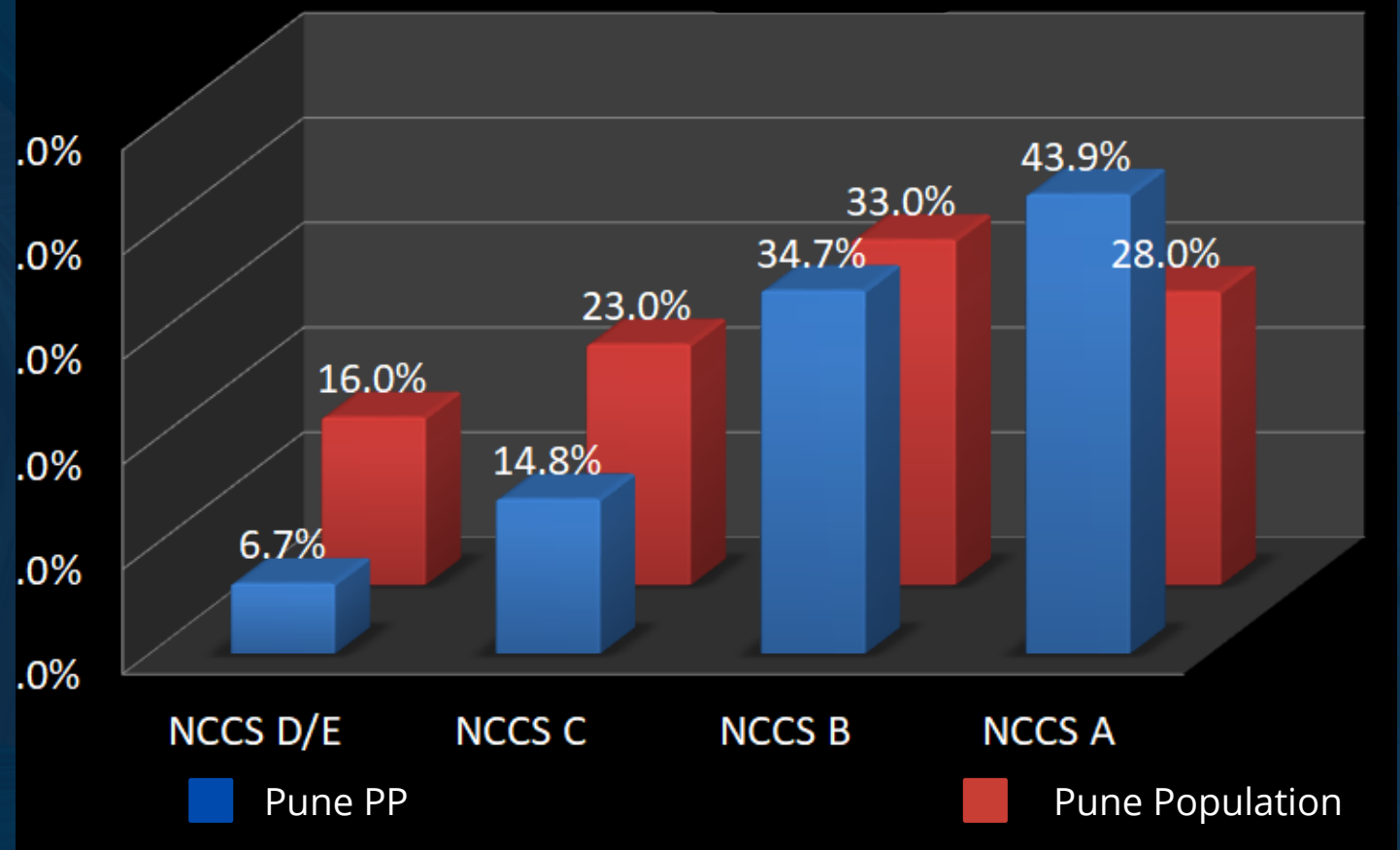
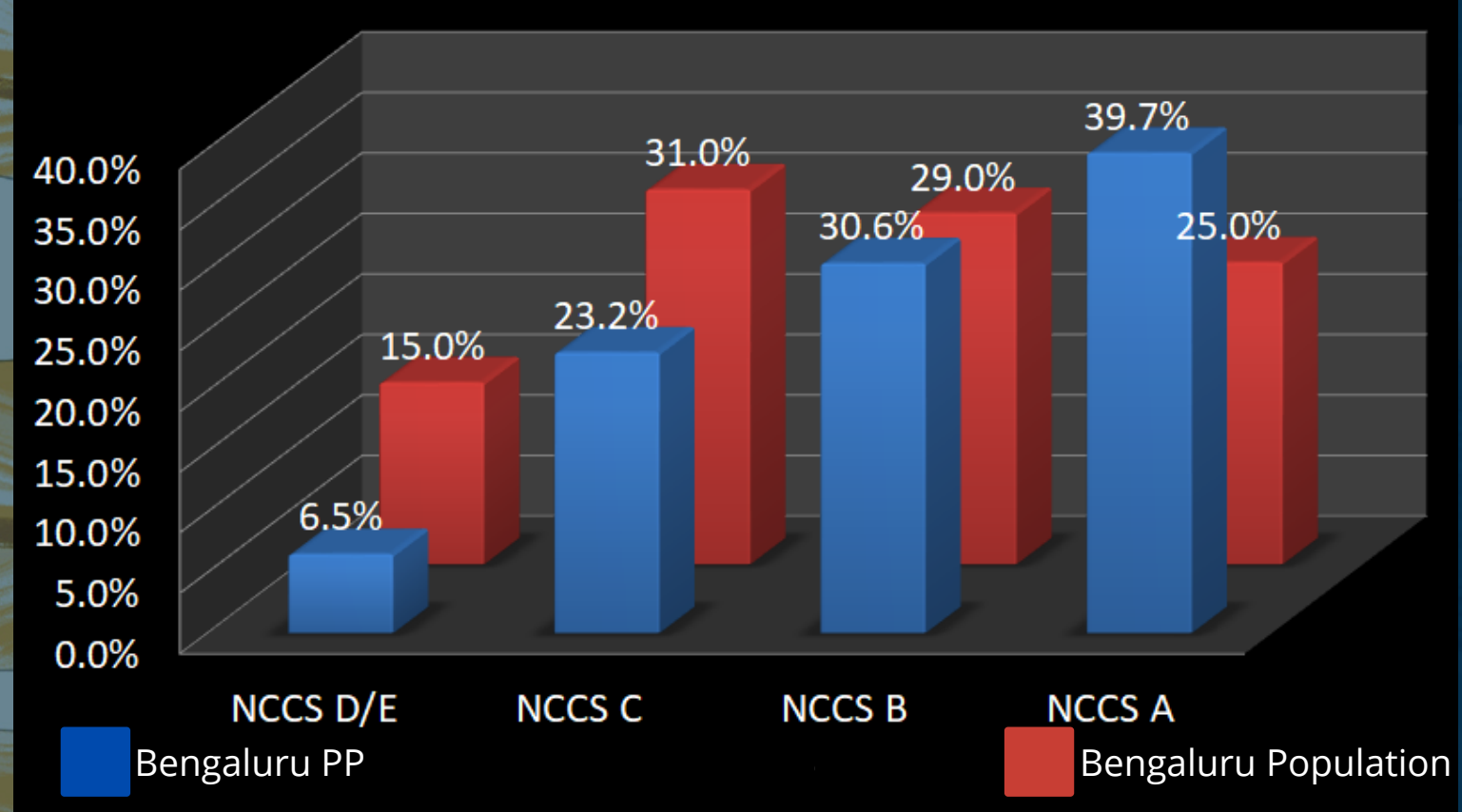
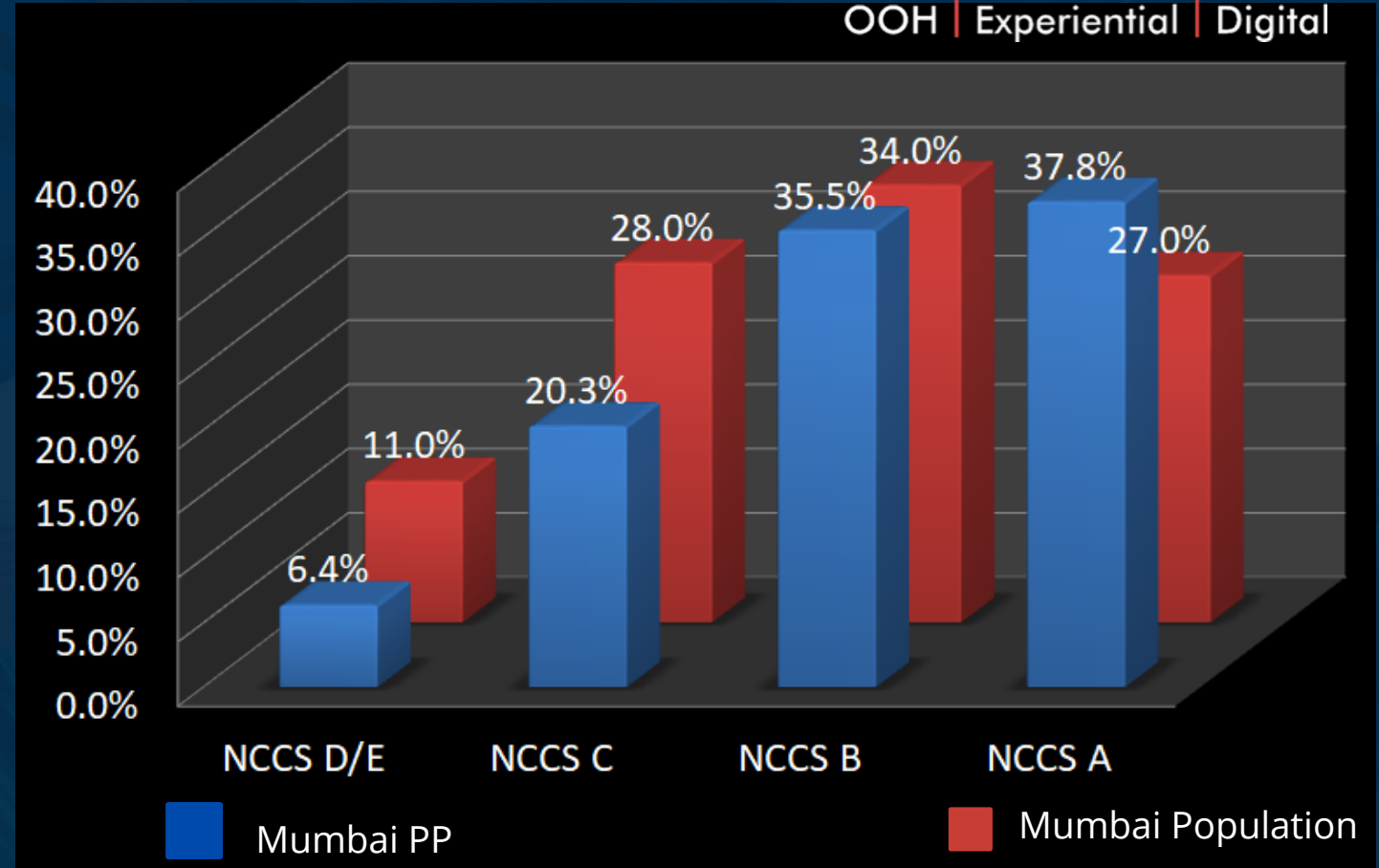
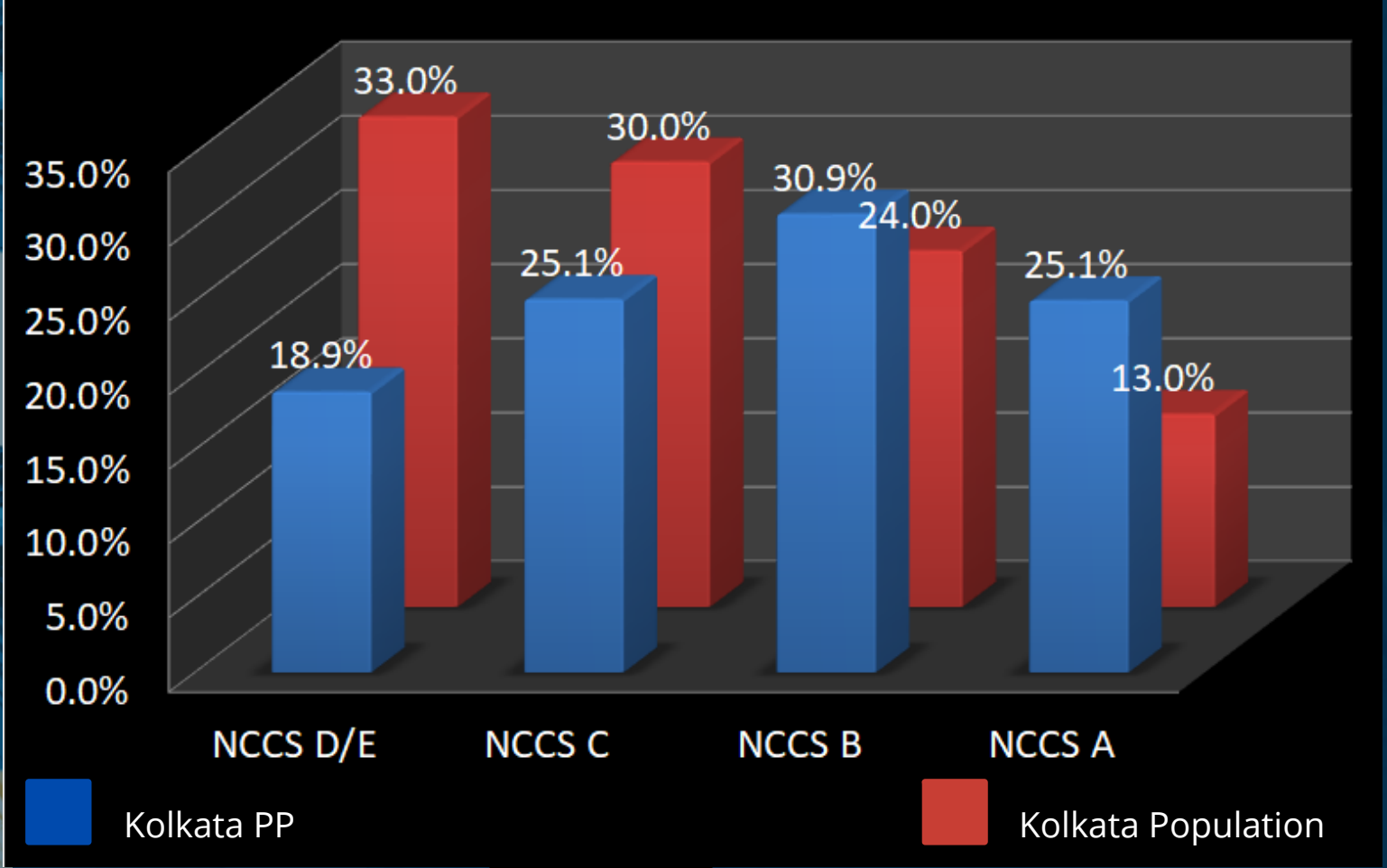


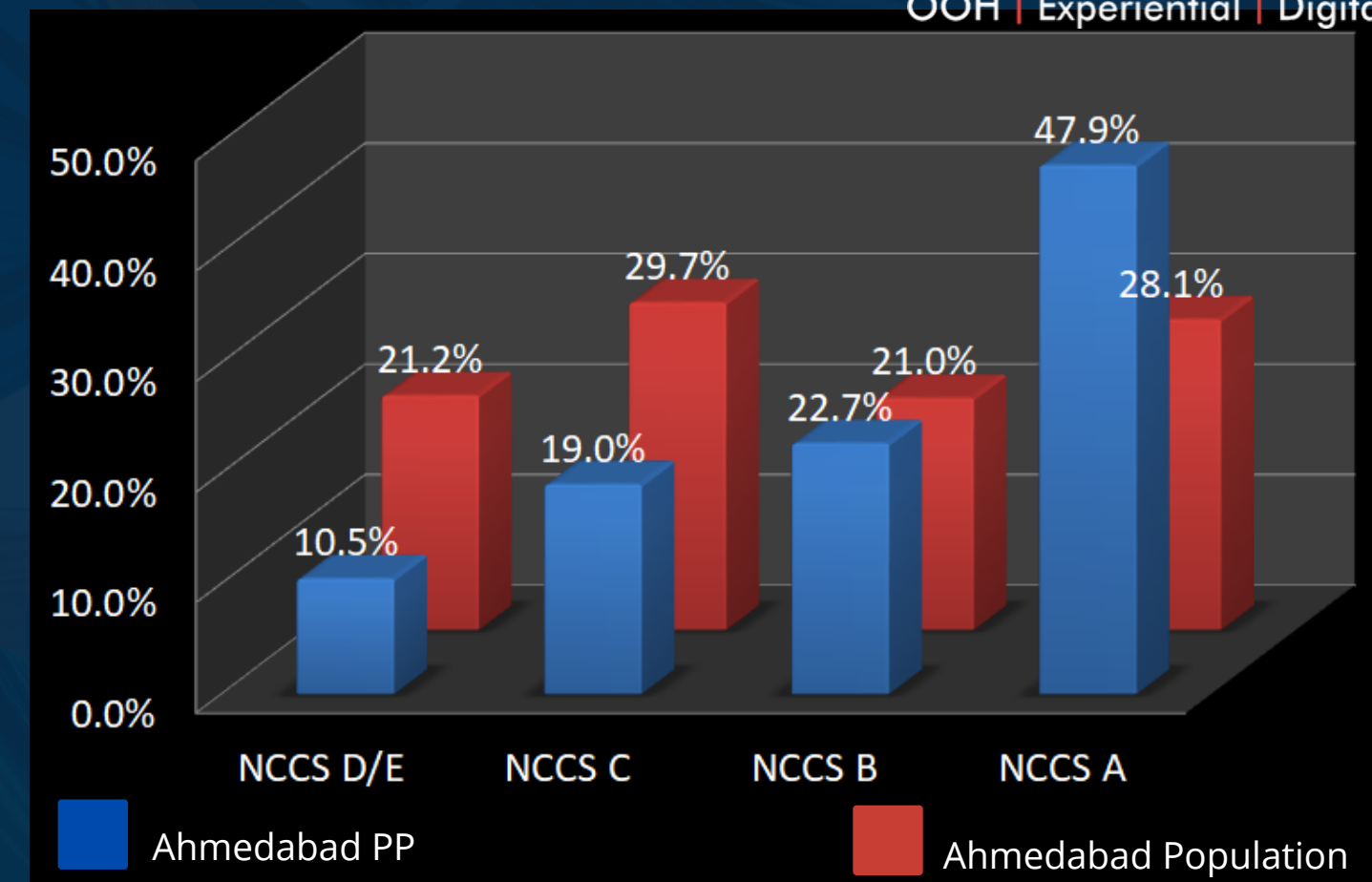
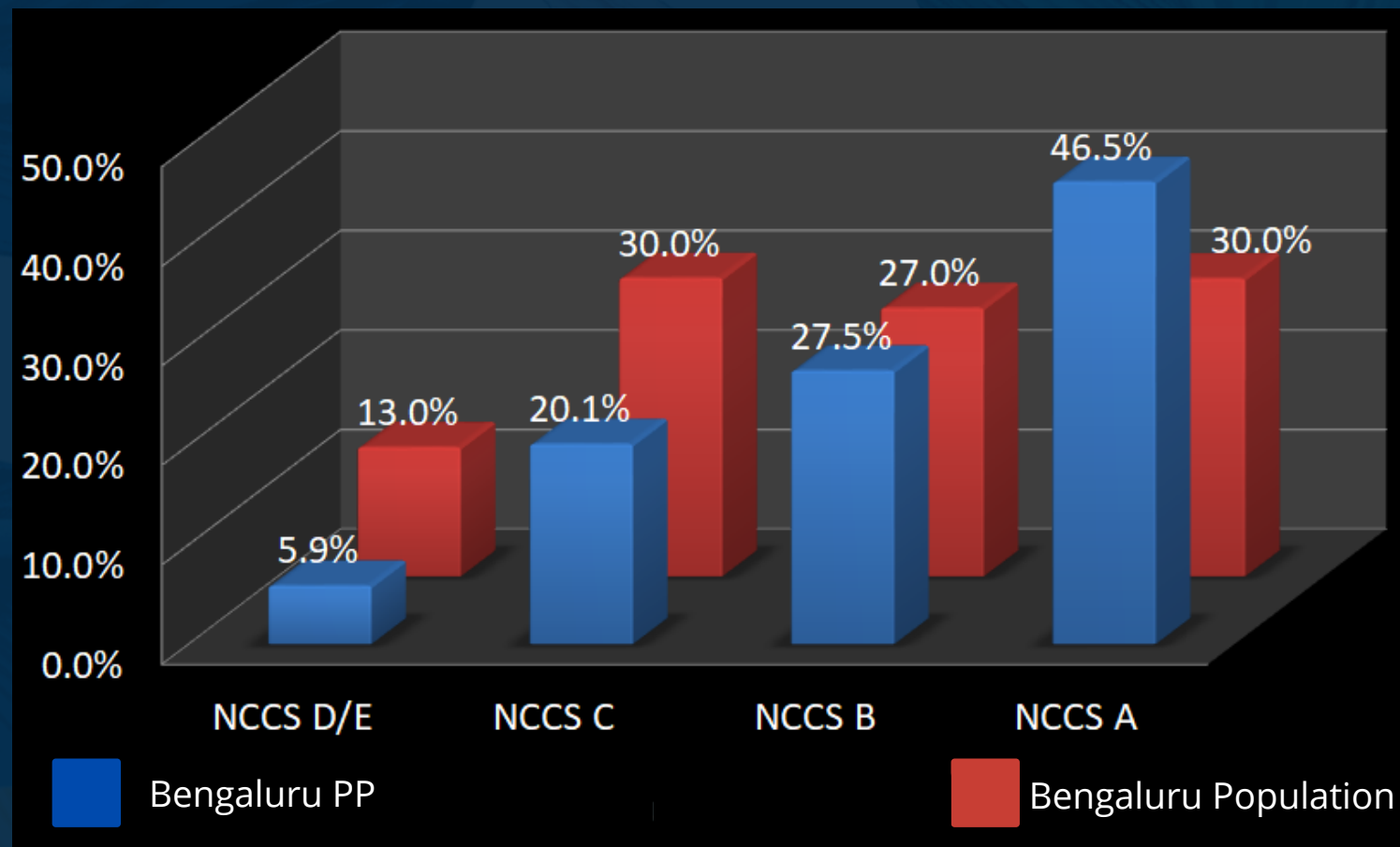
NCCS D&E: 15% POPULATION AND 6% (~5k Cr) PURCHASING POWER ACROSS THE TOP 8 METROS



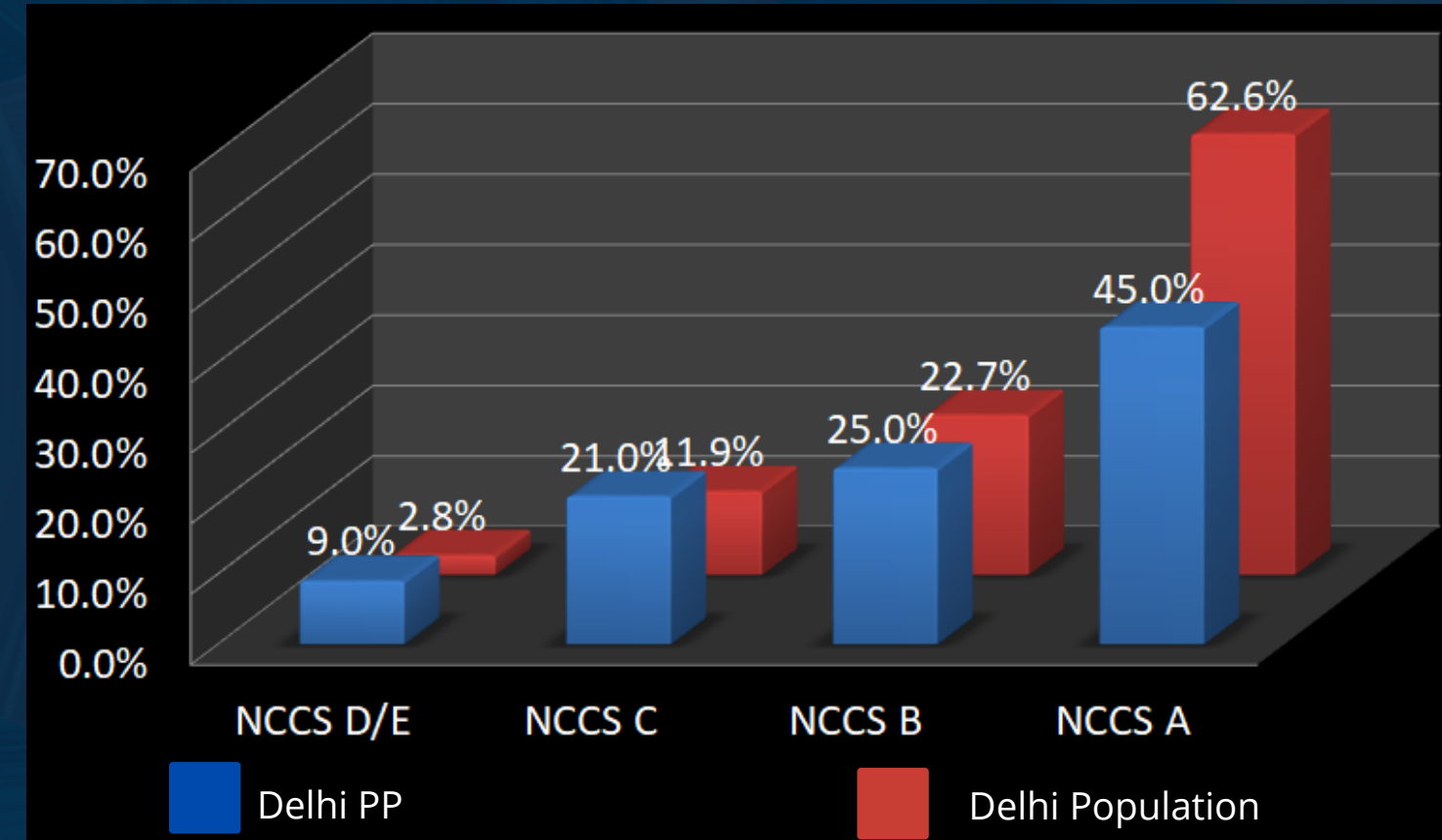
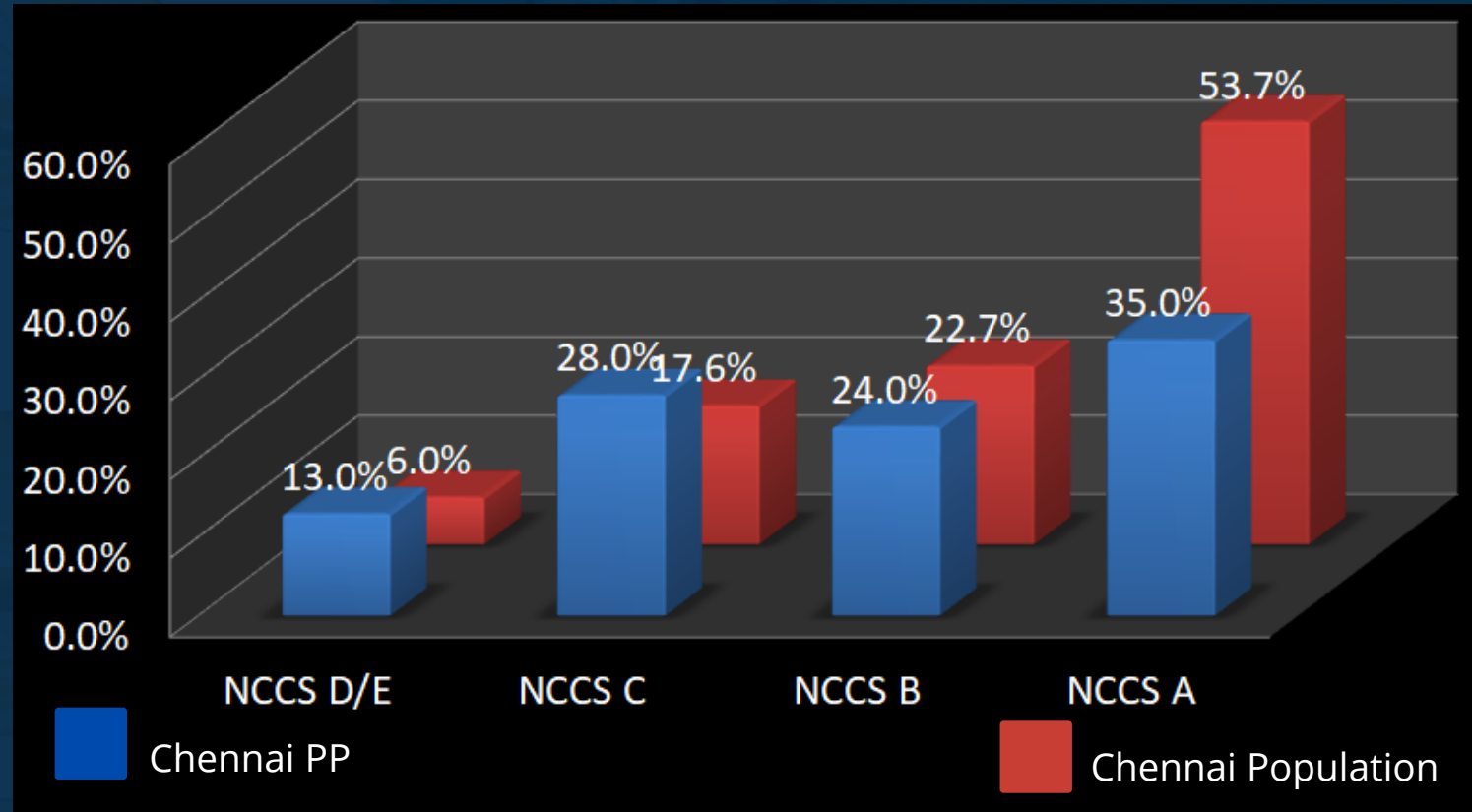
Rs. '000 crores

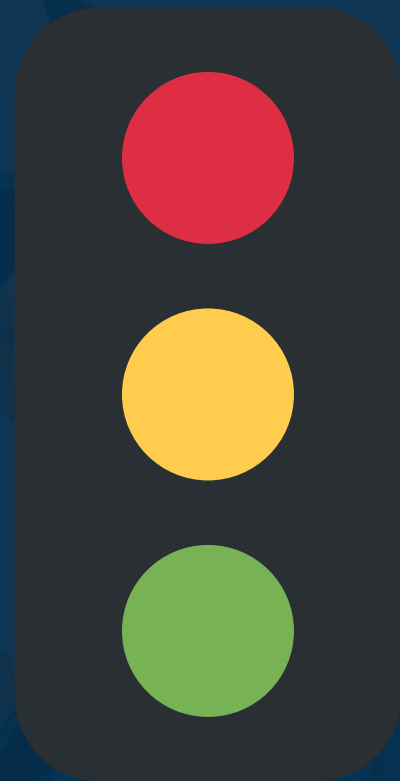
**NCCS
POPULATION
AND
PURCHASING
POWER ACROSS
CITIES**





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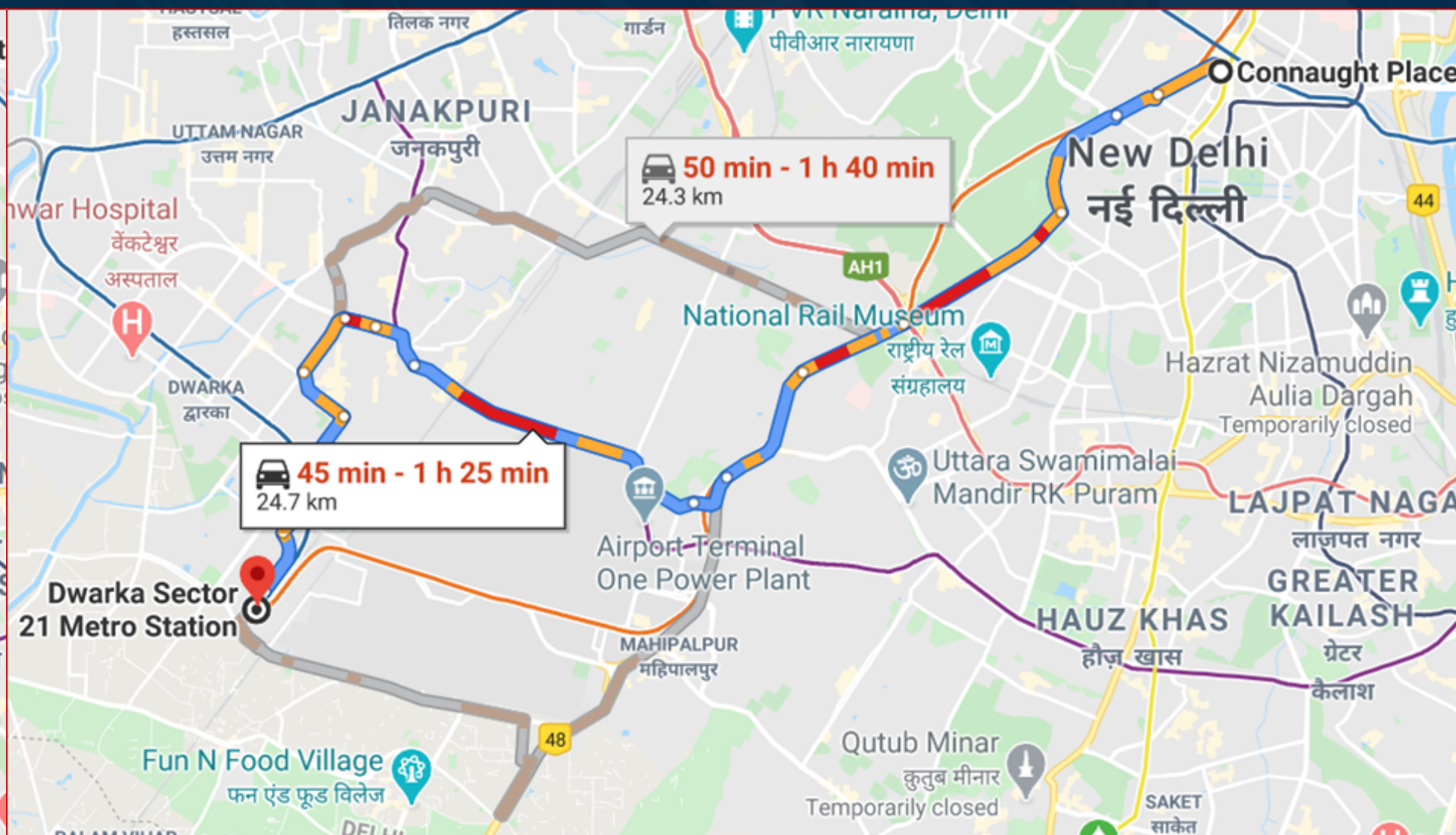
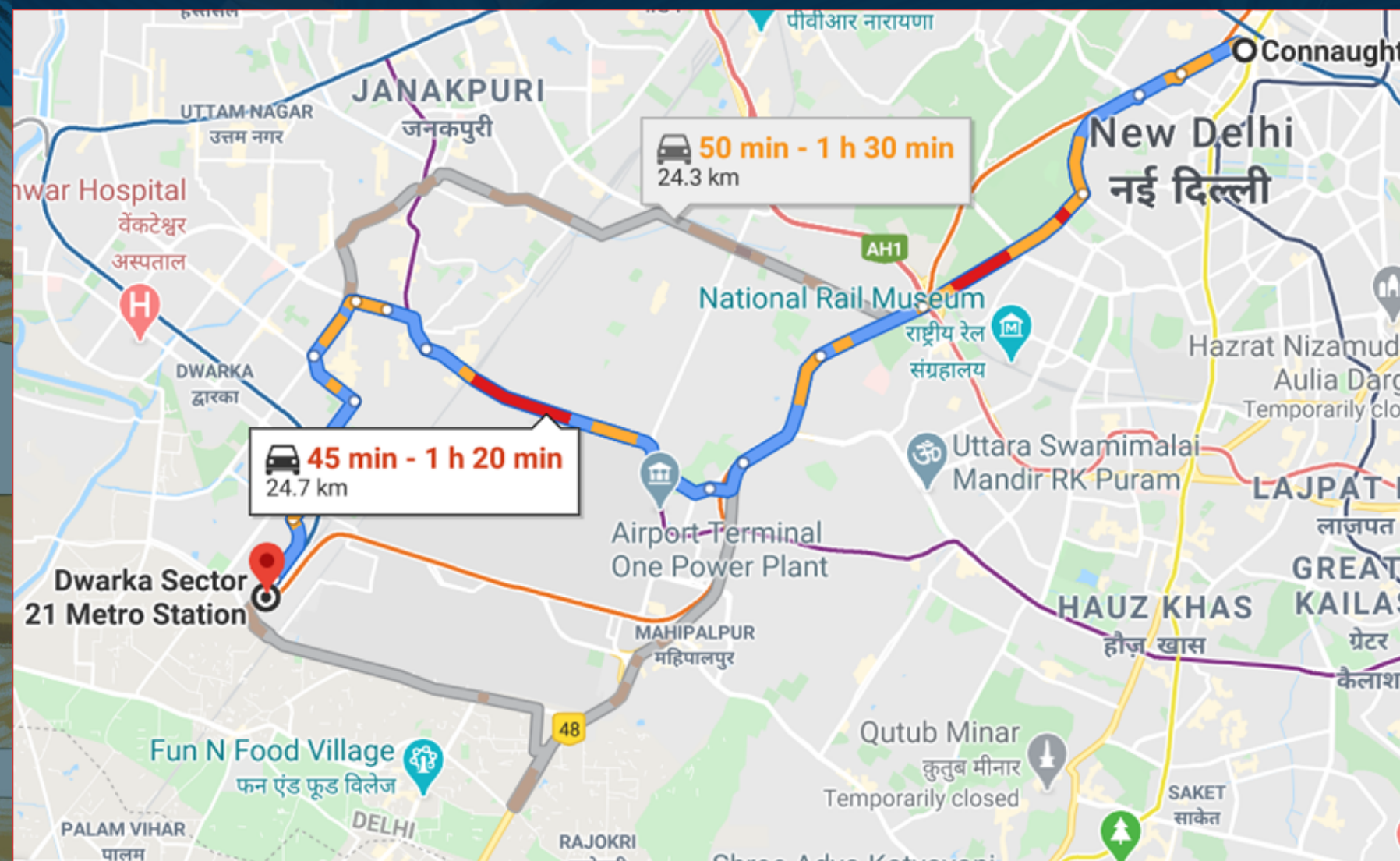
Travel times are fast
getting back to
'Normal' in
Delhi NCR, Bengaluru
and Mumbai.

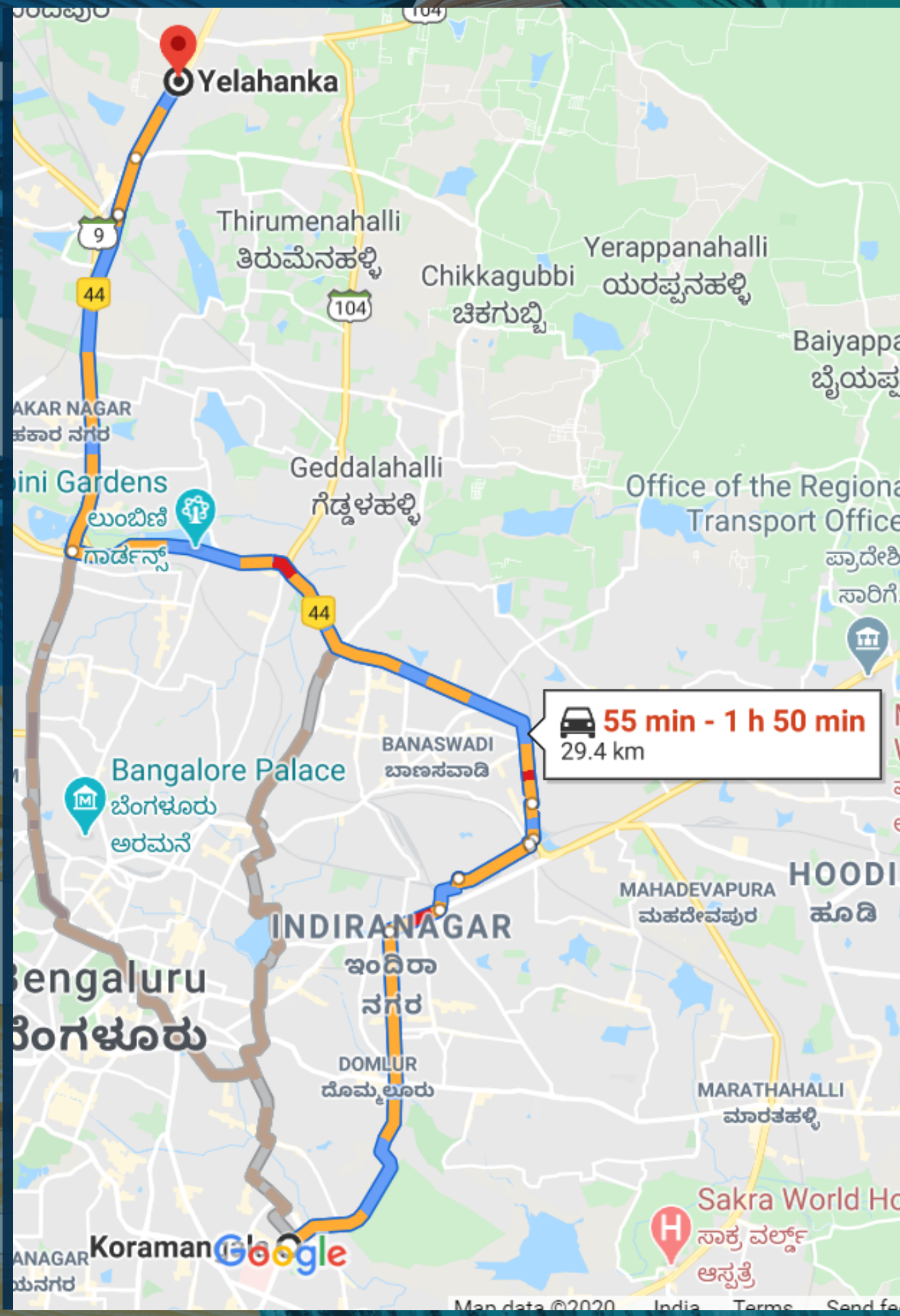
DELHI

The **RED** Lines are BACK!

Traffic on Friday,
Feb 21, 2020 at
5:50 PM

Traffic on
Tuesday, June 9,
2020 at 5:50 PM





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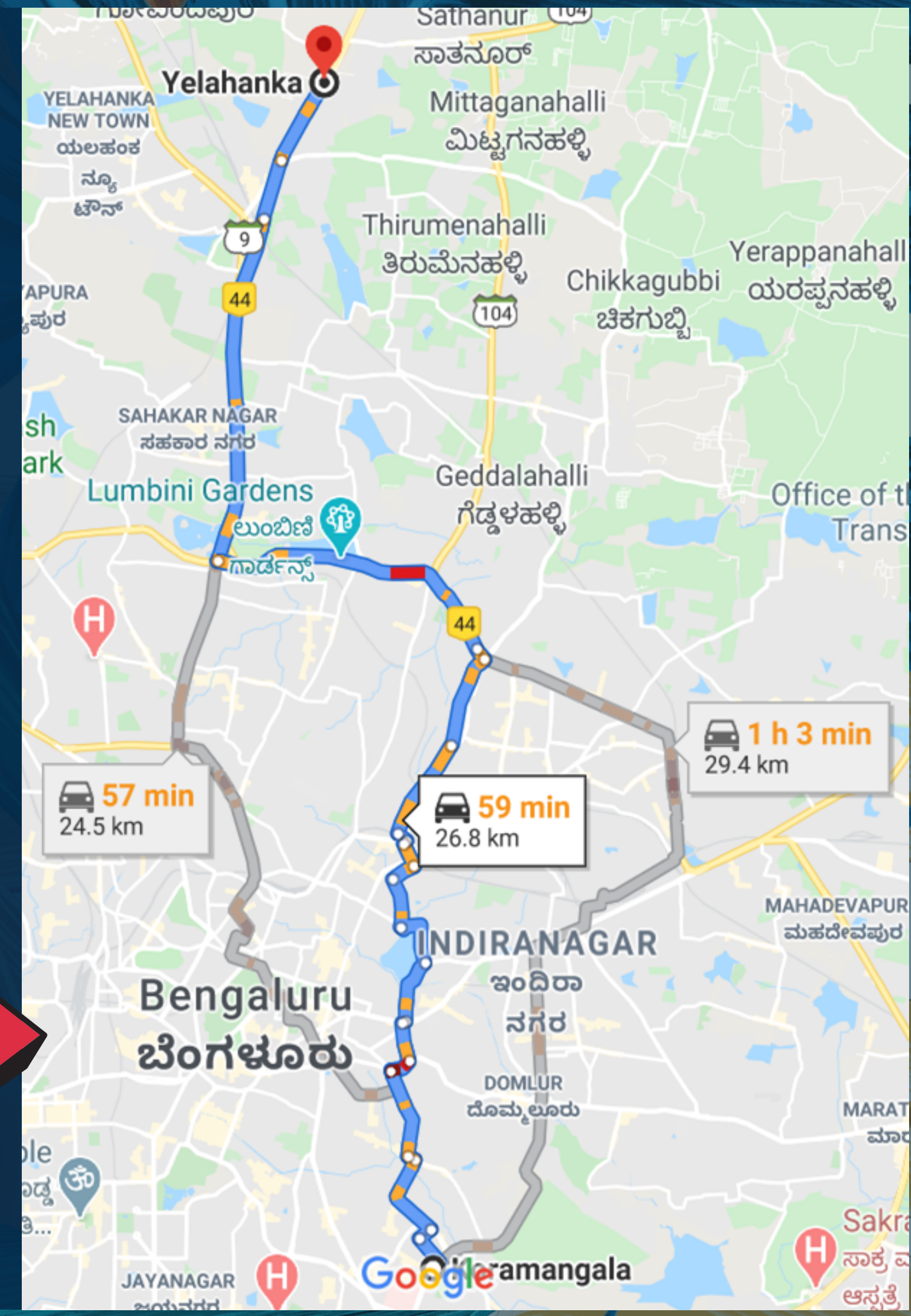
MEDIA GROUP

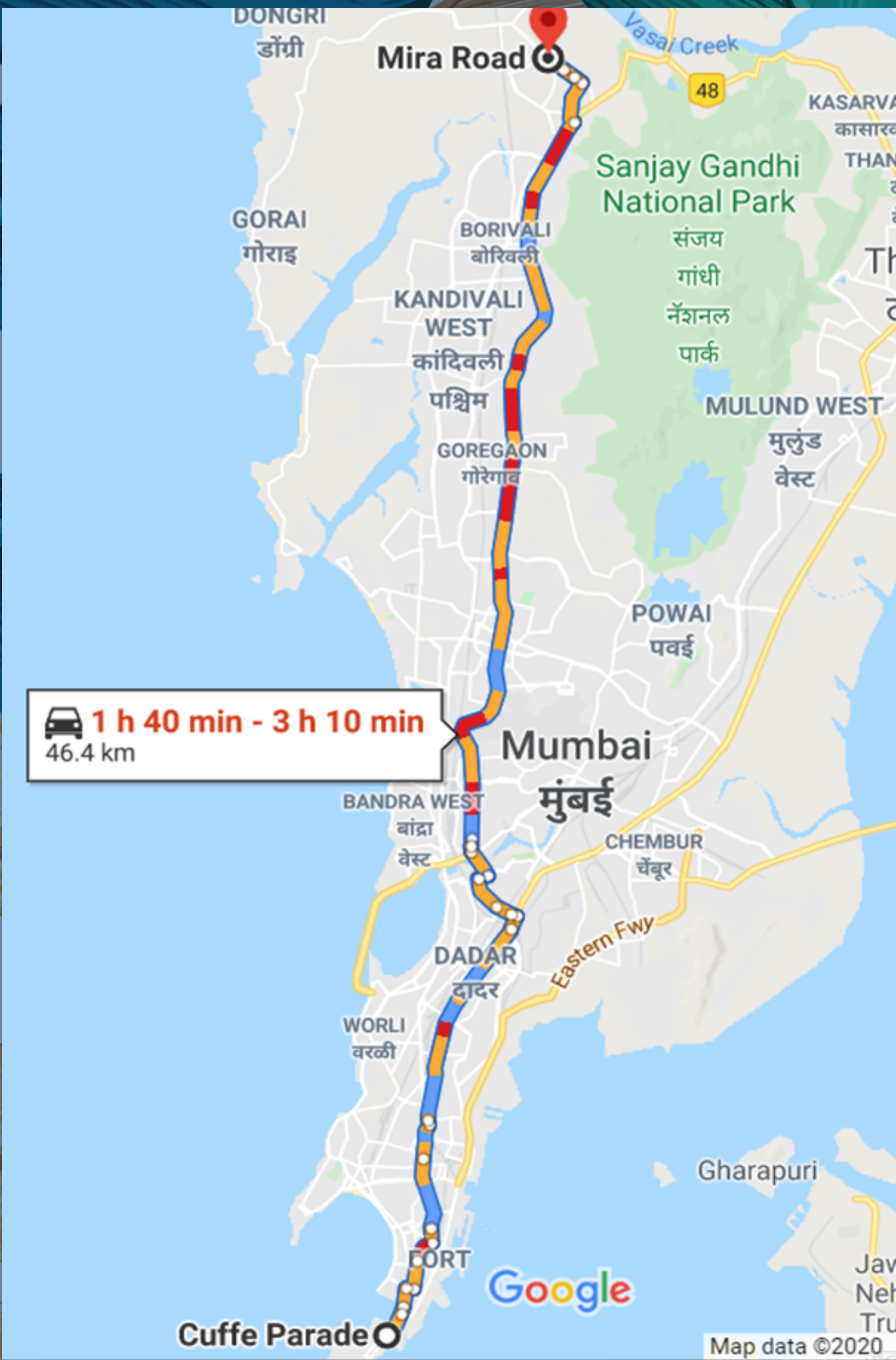
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BENGALURU
The **RED** Lines
are **BACK!**

Traffic on
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2020 at 5:50 PM



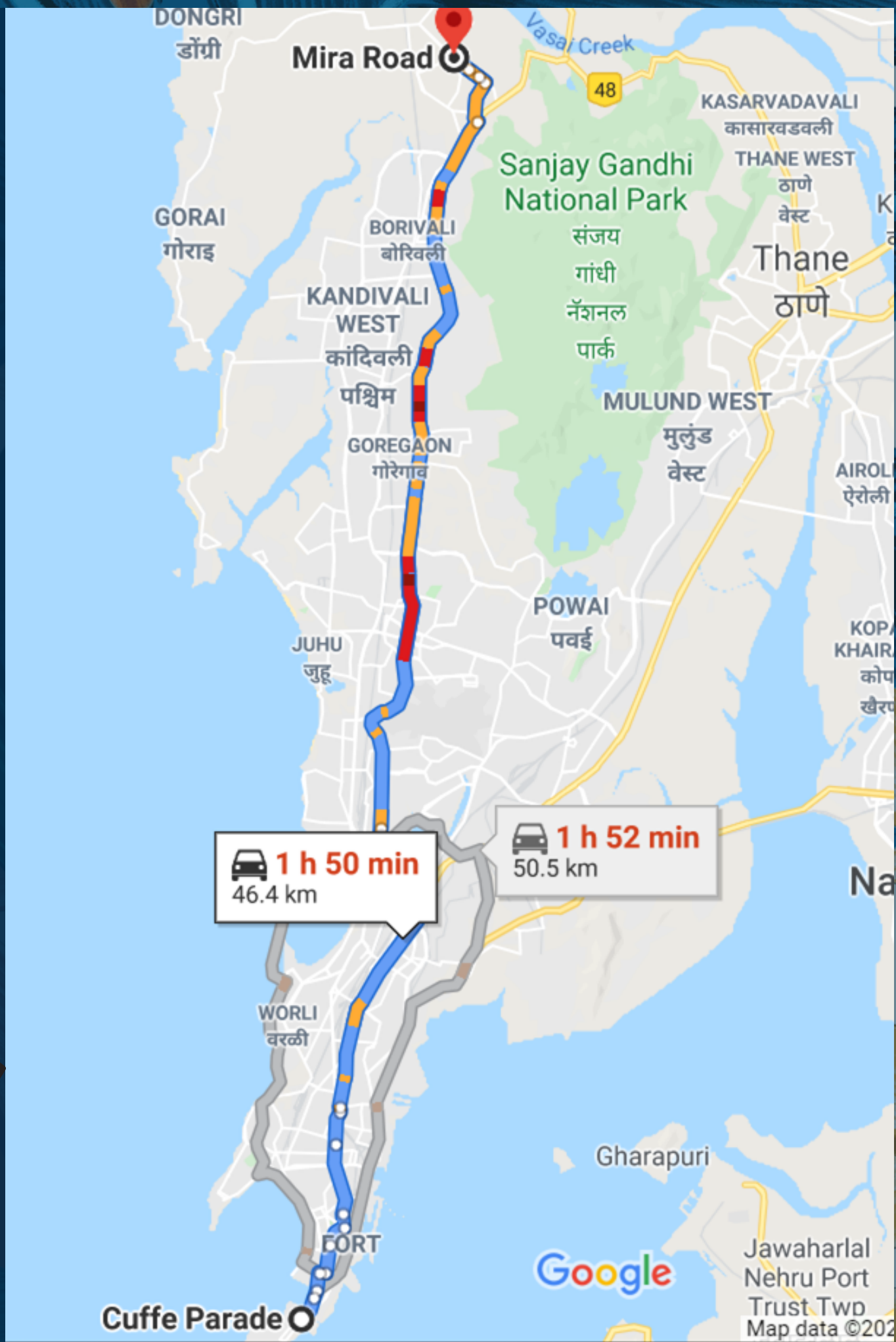


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Traffic on Friday,
 Feb 21, 2020 at
 5:50 PM

MUMBAI
 The **RED** Lines
 are BACK!

Traffic on
 Tuesday, June 9,
 2020 at 5:50 PM



Even if the containment zones are sealed and the entire NCCS D&E population is inaccessible, **94% of the purchasing power of the cities is available** for brands across verticals.

The only verticals that may continue to see some impact are:

FMCG



ESSENTIAL GOODS



HOUSING



In sum

- ✦ The containment zones will not impact the businesses targeted at NCCS A, B and C.
- ✦ Therefore, brands that start engaging with these segments (A, B and C) now will gain more than brands that don't.
- ✦ ***Traffic is building up on the roads again! This is the time to get back to your TG.***





THANK YOU!

Laqshya Media Insights Group
June 10, 2020

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