

Out of Home Market Review

Q1 2009

(Cycles 1 - 7)



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As was the case across the entire advertising industry in this country, quarter one of 2009 has been a challenging time for the Out of Home sector. However, the medium is proving resilient and continues to attract investment and support from some of the top advertisers and brands in the land.

As you will see in this report, traditionally strong Out of Home categories such as Telecoms, Beers & Ciders and Entertainment are still very active on a wide range of roadside, transit and ambient formats. The display value for the entire sector in cycles 1-7 (29 Dec – 5 Apr) was €50.2m, a slight decrease on the same period in 2008.

The rebranding of Hibernian Aviva provided a significant boost to the sector in the early part of 2009 and its various bursts of activity has made the brand number one in terms of display value for quarter one, with a value of almost €1.5m. Guinness, through a combination of rugby sponsorship and

the 250th anniversary campaign came in at number two.

Looking at sheer numbers of campaigns, the Film sector has been the most prolific – over 25 individual movie campaigns combined to give an overall display value of over €3m.

Although not as active as in the same period in 2008, the Telecoms category is still the top spending category on the medium. O2, Vodafone, Eircom and 11811 are all among the top 10 brands for the year to date. An encouraging aspect for our medium over the first part of the year has been the large number of campaigns for other media on Out of Home. Newspapers, TV stations and radio stations have all used Out of Home extensively.

In Northern Ireland, the display value of the market stood at Stg£9.85m, up from Stg£9.21m in 2008. The government has been the top advertiser in Q1, through agencies such as the Health Promotion Agency and Fire & Rescue Service. Retail

and Tourism have also been extensively active.

From a PML Group perspective, we continue to move forward and Q1 saw the relaunch of our Ambient division as AmbientPlus, with an expanded brief including digital media. Their new web site can be accessed at www.ambientplus.ie. Q2 will see the launch of some new research initiatives from PML Group and more details will follow.

The changing nature of the economy and the industry is also becoming apparent in the creative executions seen on Out of Home and other media in recent times. Price and Offer led designs are becoming more and more visible and sectors such as supermarkets, airlines and fast food restaurants have taken their price wars to the streets in 2009 – a recession buster's dream come true, but hey, every little helps!

- Colum Harmon

POSTERWATCH



Q1 2009

Cycles 1-7

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Overall Market Value

Q1 2009

€50.2m



Q1 2008

€51.9m

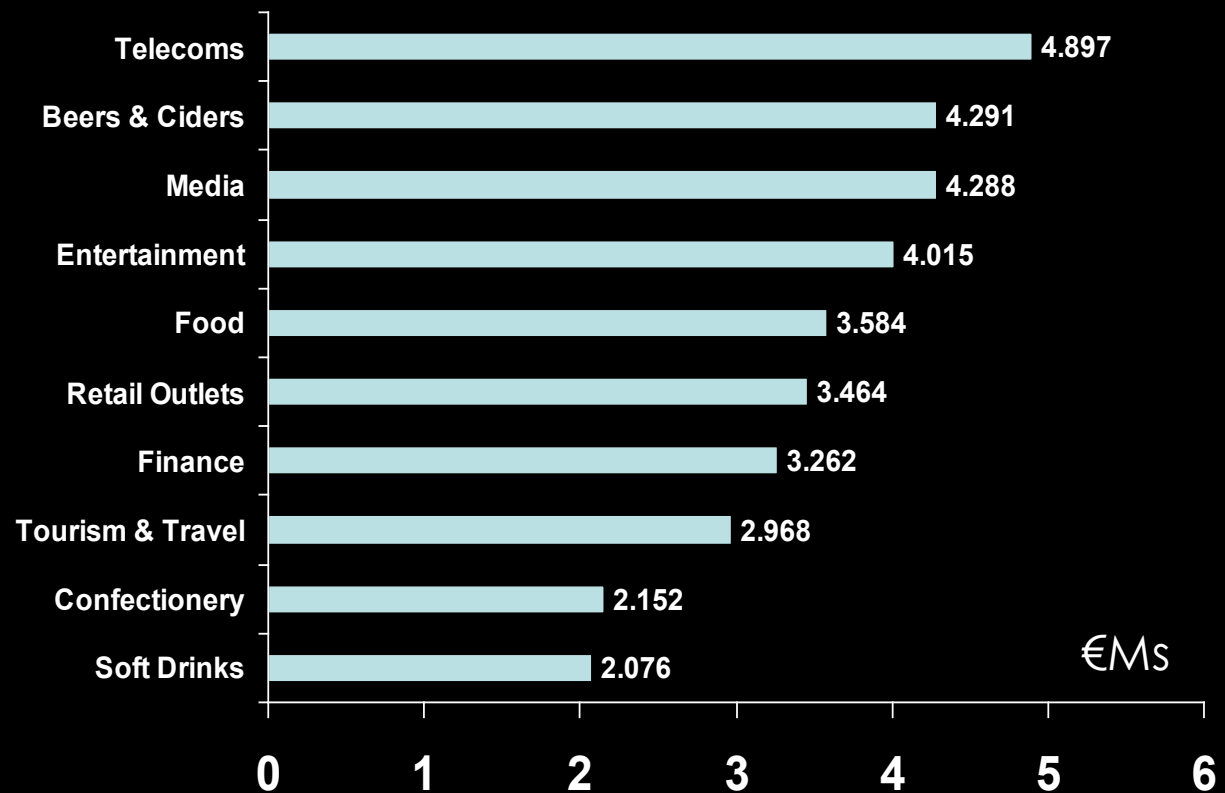
-3% Difference

- . Figures are based on display value
- . Figures are based on media owner rate cards

ROI Top 20 Brands

1. Hibernian Aviva	€1,429,747
2. Guinness	€1,299,357
3. O2	€1,292,152
4. UPC	€ 921,585
5. Heineken Lager	€ 920,730
6. Coca Cola	€ 897,917
7. Vodafone	€ 833,077
8. Budget Travel	€ 772,407
9. Eircom	€ 749,560
10. Meteor	€ 723,625
11. 11811	€ 717,052
12. SuperValu	€ 713,323
13. MEAS	€ 708,526
14. Cadbury Creme Egg	€ 619,501
15. 3 Mobile Network	€ 616,528
16. Nicorette	€ 491,211
17. 4FM	€ 459,615
18. Bord Gais	€ 457,135
19. Budweiser	€ 428,898
20. Samsung Pixon	€ 412,941

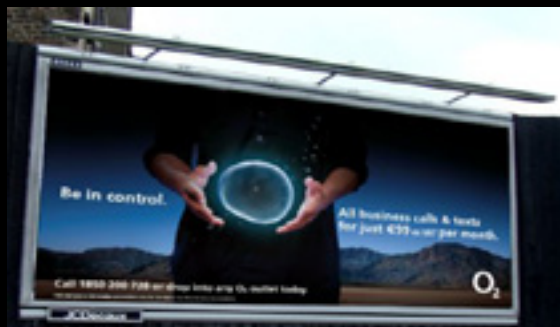
ROI Top 10 Categories





ROI Top 10 Advertisers Q1 2009

1. Diageo	- Guinness, Budweiser, Bud Light, Carlsberg	€2,336,902
2. Eircom	- Various Eircom services, 11811	€1,466,612
3. Hibernian Avivia	- Hibernian Re-brand & Health	€1,429,747
4. Coca Cola	- Coca Cola, Coke Zero, Burn, River Rock	€1,400,098
5. Heineken Ireland	- Heineken, Coors Light	€1,372,413
6. O2	- Various O2 products and services	€1,292,152
7. Kellogg's	- Various Kellogg's cereals	€1,103,373
8. Unilever	- HB, Ben & Jerry, Lyons Tea, Comfort	€1,019,057
9. Cadbury	- Caramel, Creme Egg, Dairy Milk, Wispa	€ 983,686
10. UPC	- Various UPC products and services	€ 921,585



Top 10 on Large Format

1. Hibernian Aviva	€1,303,573
2. UPC	€ 662,849
3. O2	€ 623,755
4. Guinness	€ 584,471
5. Budget Travel	€ 503,682
6. Bord Gais	€ 457,135
7. Heineken	€ 395,819
8. 3 Mobile Network	€ 375,833
9. Opel Insignia	€ 334,724
10. Vodafone	€ 333,361

Top 10 on 6 Sheets

1. Eircom	€547,079
2. Coca Cola	€529,382
3. 11811	€450,192
4. Cadbury Creme Egg	€352,855
5. Meas Drink Aware	€309,929
6. Heineken	€290,663
7. Comfort Concentrate	€273,060
8. SuperValu	€269,047
9. Budget Travel	€268,725
10. Bank of Ireland	€253,240



Top 10 on Transit

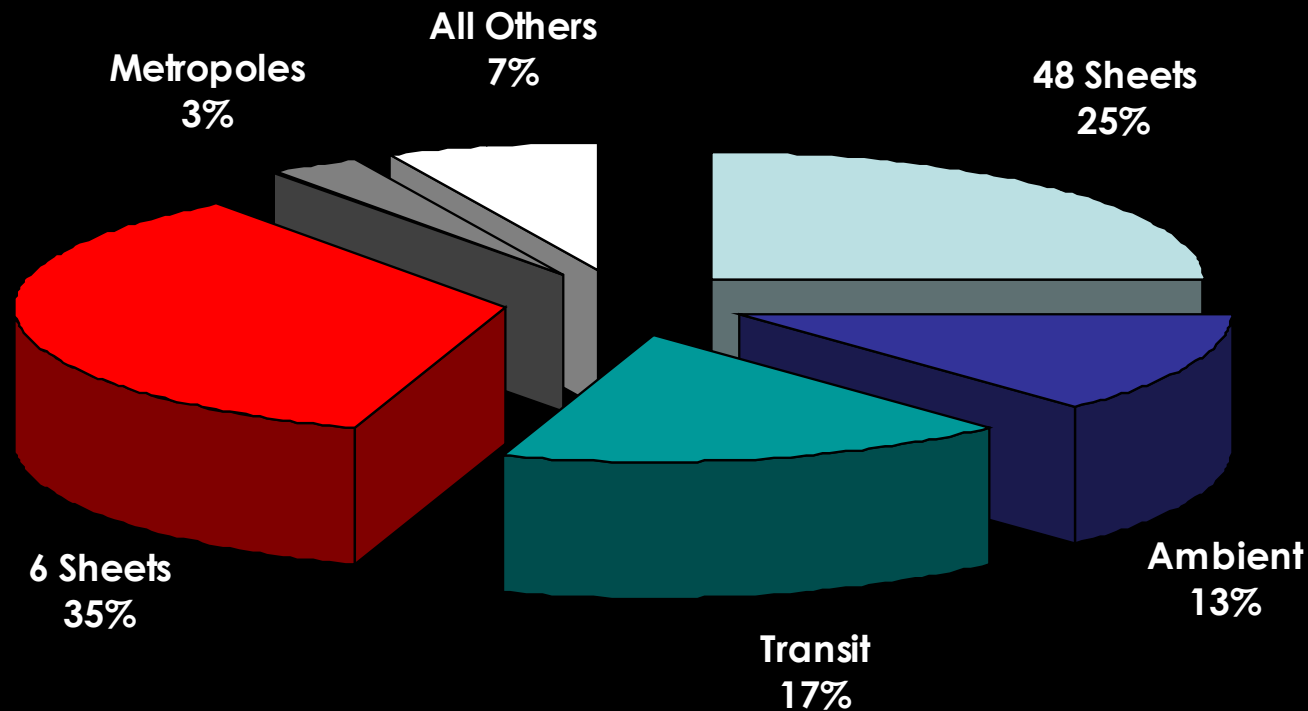
1. Meteor	€298,054
2. O2	€238,079
3. Guinness	€224,575
4. Lemsip	€222,857
5. Cadbury Creme Egg	€222,446
6. Bank of Ireland	€187,459
7. Barry's Tea	€164,987
8. 11811	€162,986
9. Vodafone	€157,825
10. Burgerking	€157,040

Top 10 on Ambient

1. O2	€226,453
2. Eircom	€197,404
3. Guinness	€187,181
4. Nicorette	€145,714
5. Coca Cola	€144,350
6. Budweiser	€136,304
7. 11811	€103,874
8. Ulster Bank	€ 88,750
9. Paddy Power	€ 84,500
10. Kellogg's Special K	€ 83,070



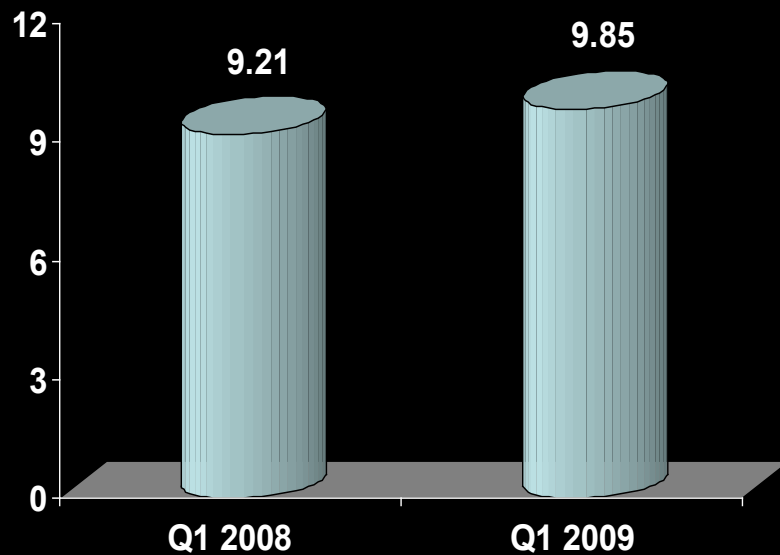
Republic of Ireland - Breakdown by Format



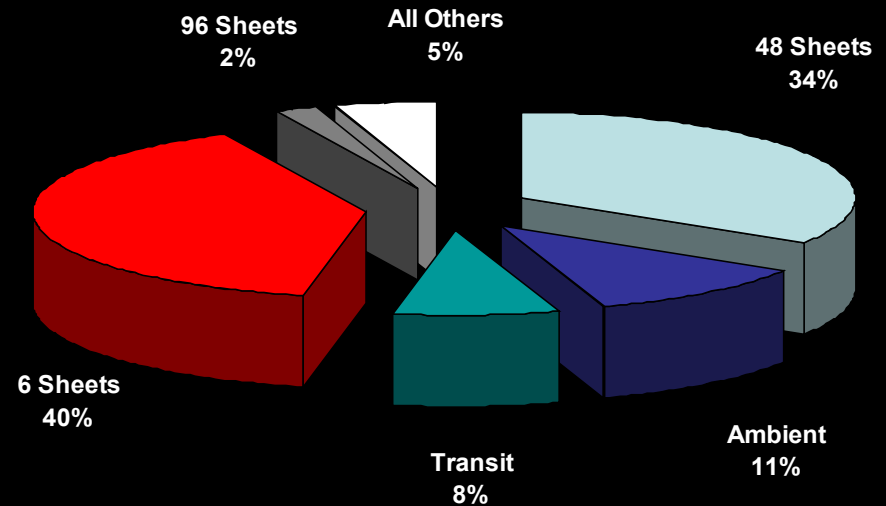
Others include: Impact Units, 12 Sheets, Bridges, etc...

Northern Ireland Market

Overall Market Value
Stg£Ms



NI Format Breakdown
Q1 2009

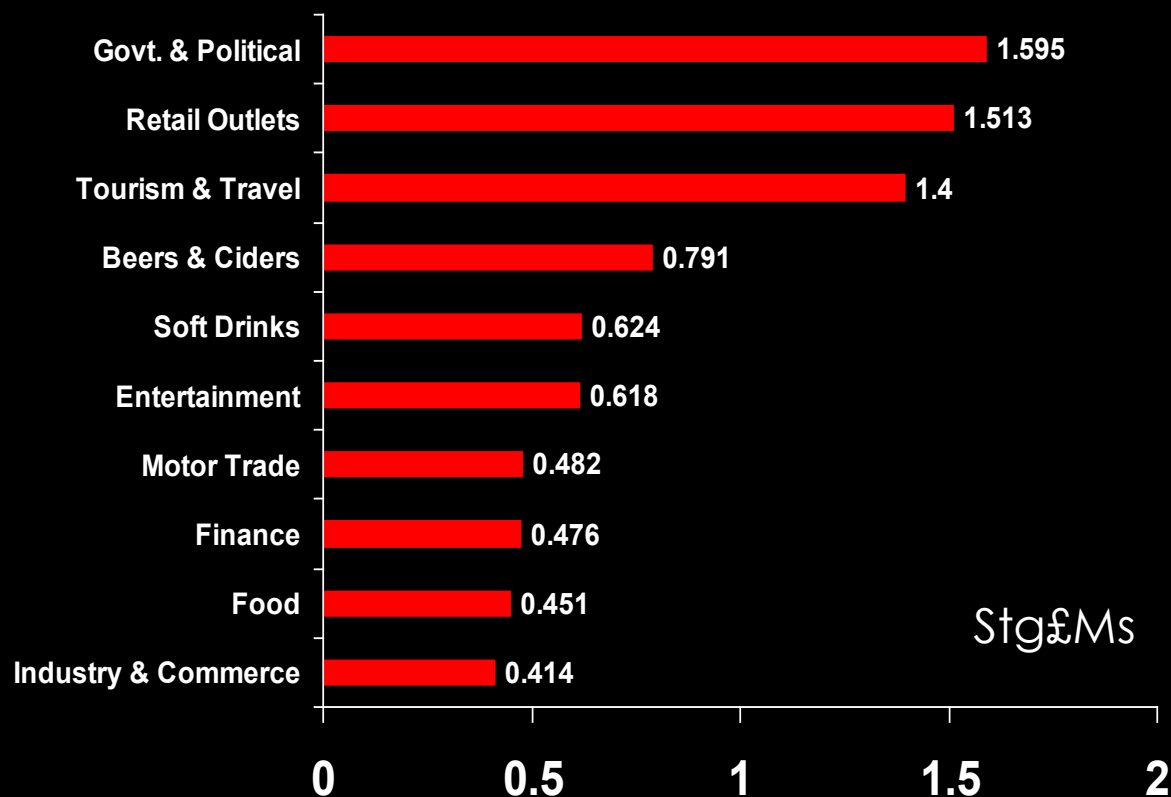




NI Top 20 Brands

1. KFC	£477,860
2. Health Promotion Agency	£433,225
3. NI Fire & Rescue	£382,655
4. Guinness	£351,700
5. McDonald's	£288,035
6. Coca Cola	£265,450
7. Aer Lingus	£231,195
8. NI Tourist Board	£195,901
9. Odyssey	£193,055
10. Magners Original	£189,863
11. easyJet	£169,316
12. Axa Insurance	£137,760
13. Northern Bank	£111,680
14. flybe	£104,943
15. Virgin Media	£ 99,695
16. Belfast Telegraph	£ 94,340
17. Falcon Holidays	£ 92,070
18. Renault Motors	£ 83,375
19. Carlsberg	£ 80,845
20. River Rock Water	£ 80,805

NI Top 10 Categories



Methodology

The figures contained in this report are based on published Media Owner rate cards and refer to display values only.

The figures are drawn from PML Group's exclusive Posterwatch service, which monitors 100% of roadside and transport panels (interior and exterior) every two weeks.

The figures also include Ambient Media.

For further details on 14 years of Posterwatch data please contact Colum Harmon on: 01 668 2900 or colum@pml.ie

