

Out of Home Market Review

Q1 2010

(Cycles 1-7)



Food for Thought

Colum Harmon, Marketing Manager PML Group, reviews Q1 2010 in the Out of Home sector.

The nature and content of the advertising we all encounter on a daily basis tends to be a reflection of the times in which we live. This is no different of the Out of Home sector. In years gone by, cars were a major advertising group in the first part of the year. More recently, Beers and Telecoms have dominated.

These categories are all still heavily involved in Out of Home, as you can see from the table below, but 2010 has seen a slight change in emphasis. Food was the top spending category in cycles 1-7. This is not fast food or food retailers but food products and brands available for purchase in-store. There hasn't really been a dominant player within the category. It is more the case that a wide range of brands such as Kellogg's, Denny, Erin and Roma are all using Out of Home as a means of getting the attention of the household shopper.

This is an interesting development in itself but from an Out of Home perspective it is very encouraging in that it reflects the strength

of the medium in influencing decisions at point of sale. Over one third of the Out of Home spend in this category has been on point of sale formats. Formats such as Purchase Points, Malls, Adbox, Trolley Handles and Citybox all offer the client the chance to communicate with shoppers at the most important time - when they are in a purchasing frame of mind. This has been a real plus for our sector in recent times.



It's also an area that has seen investment on the part of the media owners. CBS have launched Trolley Bay advertising and digital screens in The Square while Bravo is now offering

Store Points in Tesco stores. Our own iQ system highlights the importance of this type of advertising, with our research showing that over 50% of main shoppers go grocery shopping more than once per week.

Entertainment, mainly in the form of films, has been the second most active category in 2010. Releases such as *Invictus*, *Alice in Wonderland* and *How to Train Your Dragon* were among those using Out of Home to the largest extent. The options faced by people with regard to in-home entertainment continue to expand and Out of Home has showcased a number of these in early 2010. Among these was Sky TV, who used *Metropol*es and 48 Sheets to push their HD offering.

There were some very strong individual campaigns in Q1 also. Cadbury used Out of Home to launch the Crème Egg 'season' running from 1st Jan - 4 Apr, Ballygowan 'went pink' to great effect with strong creative and some contravision specials and Aviva completed the migration from Hibernian to Aviva with another large and effective campaign in the early cycles of 2010.

Overall Market Value

Q1 2010
€51.7m



Q1 2009
€50.2m

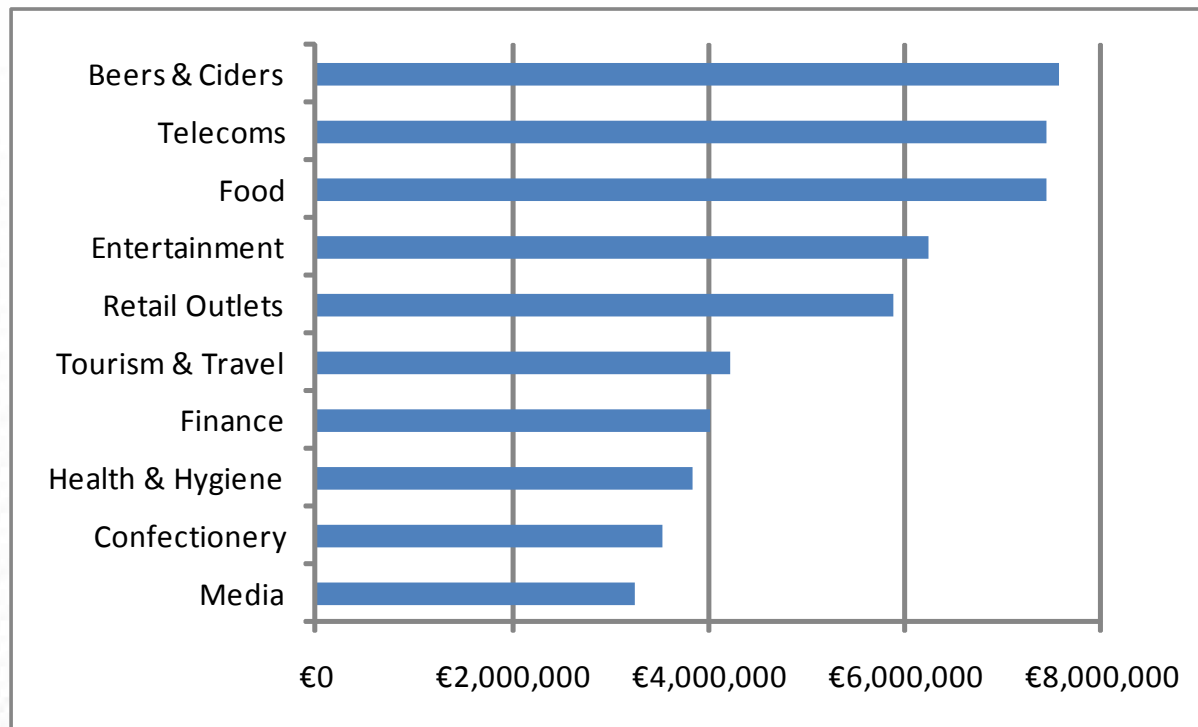
+3% Difference

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

ROI Top 20 Brands

1.	Guinness Rugby	€922,575
2.	UPC - Broadband	€891,581
3.	Coors Light	€843,644
4.	McDonalds Euro saver	€799,954
5.	Specsavers	€798,073
6.	Cadbury Creme Egg	€777,797
7.	Aviva	€676,925
8.	Coca Cola	€577,098
9.	Heineken Lager	€540,868
10.	Denny Foods	€479,730
11.	Heineken Cup	€474,416
12.	Beamish Stout	€471,677
13.	Meteor - Broadband	€454,842
14.	Lyons Tea	€450,025
15.	SuperValu	€431,015
16.	AXA Insurance	€430,608
17.	Nicorette	€410,826
18.	Lucozade Energy	€408,601
19.	Kelloggs Special K	€398,433
20.	Trocaire	€389,007

ROI Top 10 Categories



Rank	Advertiser	Brands Advertised	Display Value
1.	Heineken Ireland	Coors Light, Heineken Lager, Heineken Cup Beamish, Murphy's Stout	€2,685,418
2.	Diageo Ireland	Guinness Rugby, Guinness Draught, Smithwicks, Budweiser Ice Cold, Smirnoff Cocktails	€2,121,621
3.	Unilever	Lyons Tea, Sure Deodorant, Lynx Twist, Surf Twilight Sensations, Ben & Jerry Ice Cream, Dove Go Fresh	€2,111,519
4.	Kellogg's	Special K, Nutri Grain Rugby, Rice Krispies	€1,369,100
5.	Cadbury	Creme Egg, GAA, Flake	€1,295,955
6.	McDonald's	Eurosaver	€1,198,945
7.	GSK	Lucozade Energy, Niquitin, Panadol Extra, Lucozade Alert Plus	€1,144,550
8.	Vodafone	Prepay, Business, iPhone	€1,100,698
9.	UPC	Sports, Home Phone & Fibre Power Broadband	€ 899,381
10.	Warner Bros	Invictus, Clash of the Titans, Valentine's Day, The Blind Side, Sherlock Holmes	€ 813,059

Top 10 on Large Format

1. Coors Light	€561,161
2. Aviva	€556,885
3. Guinness Rugby	€502,955
4. Specsavers	€461,773
5. AXA Insurance	€428,733
6. UPC - Broadband	€421,133
7. McDonald's Euro saver	€364,127
8. Lyons Tea	€318,222
9. Volkswagen	€302,999
10. Lucozade Energy	€295,266

Top 10 on 6 Sheets

1. Cadbury Creme Egg	€503,888
2. Coca Cola	€491,219
3. UPC - Broadband	€400,435
4. McDonalds Euro saver	€385,669
5. O2 - Broadband	€364,525
6. Kellogg's Rice Krispie Squares	€357,057
7. Film - How To Train Your Dragon - Paramount	€331,580
8. Specsavers	€297,299
9. Guinness Rugby	€292,035
10. Kelloggs Rice Krispies	€247,016

Top 10 on Transport

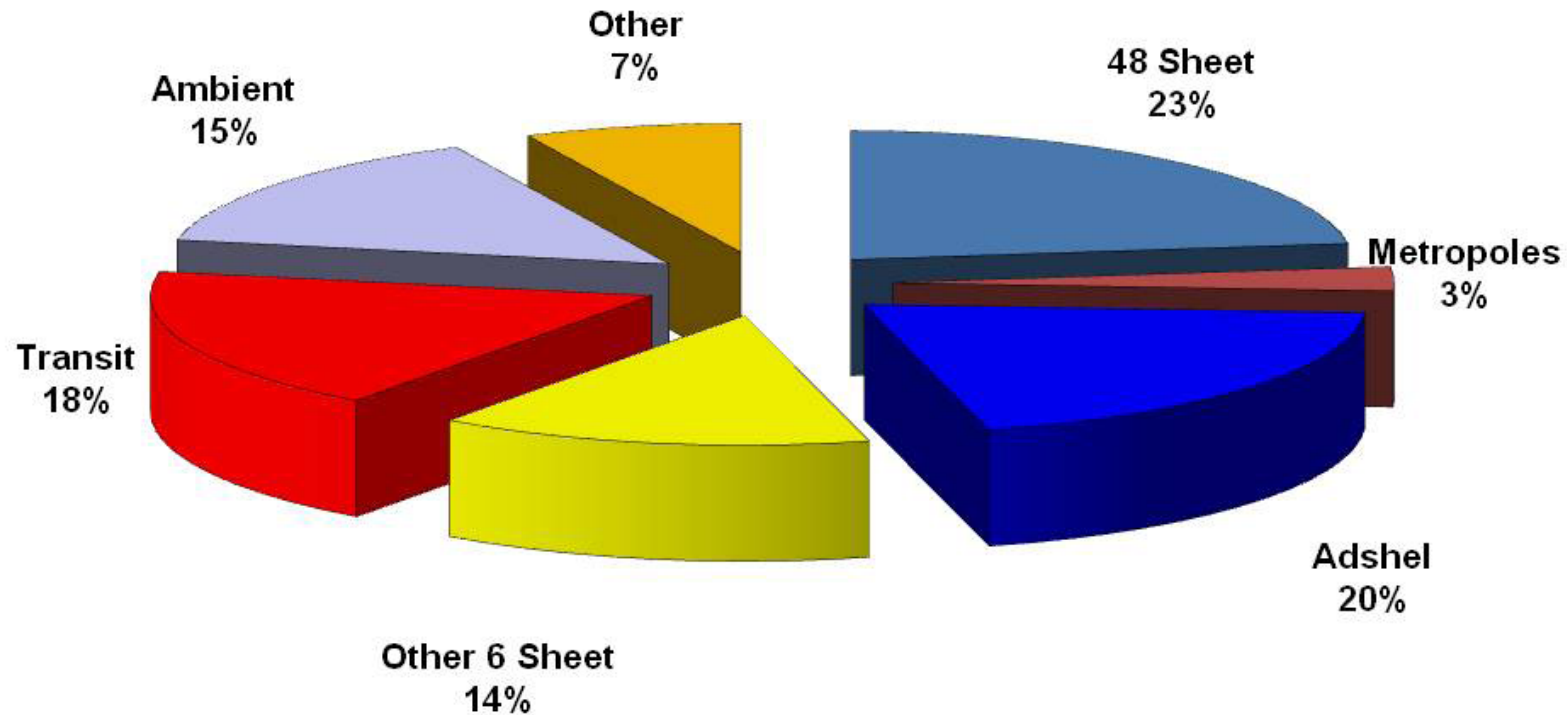
1. Roma Foods	€253,345
2. Kellogg's Nutri Grain Rugby	€183,685
3. Cadbury Creme Egg	€171,605
4. Vodafone Prepay	€147,823
5. Unilever Pricing Campaign	€147,606
6. Heineken Lager	€142,795
7. McDonald's Euro saver	€131,787
8. Egyptian Tourism	€131,326
9. Beamish Stout	€129,205
10. Film - Green Zone	€127,832

Top 10 on Ambient

1. Topaz Service Station	€295,240
2. Coors Light	€276,736
3. Guinness Rugby	€215,500
4. Planyourbreak.com	€197,514
5. SuperValu	€197,280
6. Beamish Stout	€172,500
7. O2	€168,805
8. Jagermeister	€168,320
9. Living TV	€160,910
10. Denny Foods	€155,124



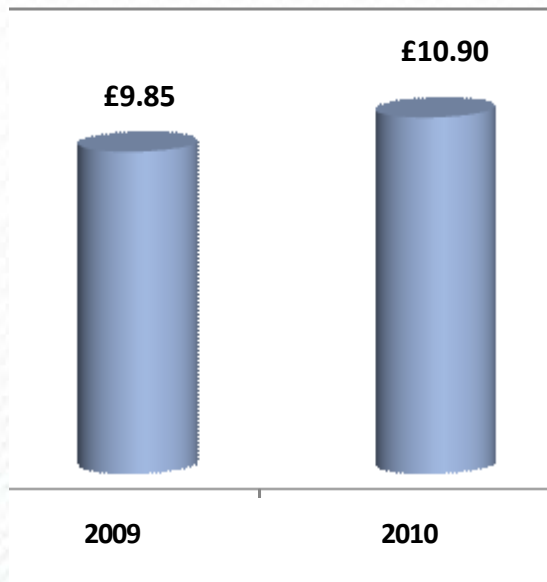
Republic of Ireland - Breakdown by Format



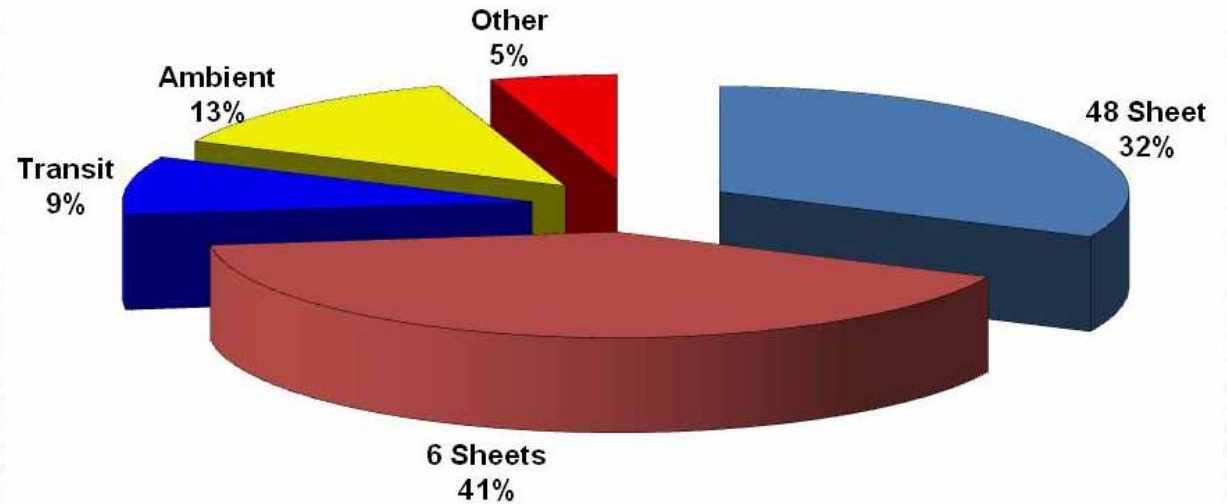
Others include: Impact Units, 12 Sheets, Bridges, etc...

Northern Ireland Market

Overall Market Value
Q1 2010
Stg £Ms



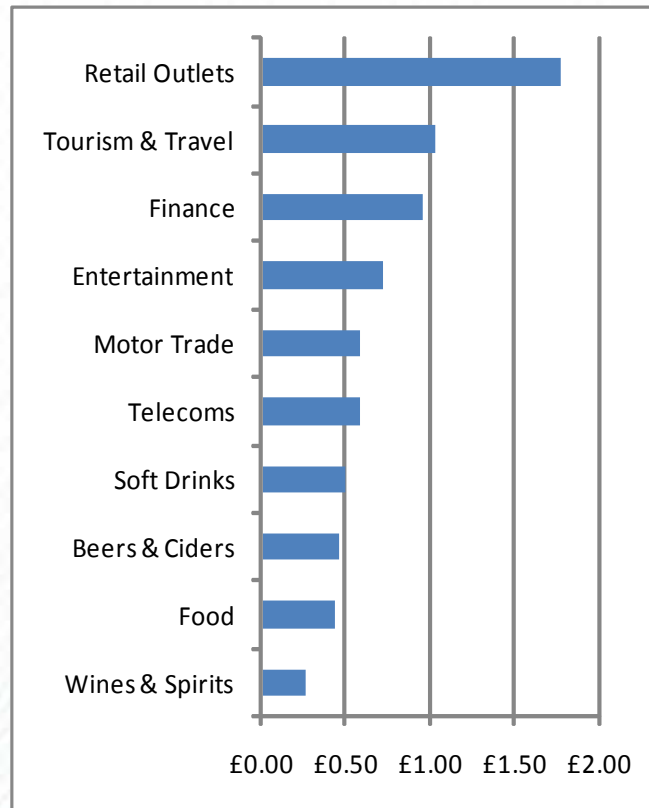
NI Format Breakdown
Q1 2010



NI Top 20 Brands

1.	KFC	£583,557
2.	Ulster Bank	£317,538
3.	MC Donald's	£277,715
4.	Coca Cola	£240,945
5.	Oxfam	£207,340
6.	Northern Bank	£206,946
7.	Harp Lager	£152,303
8.	NI Fire & Rescue Service	£149,490
9.	Orange Consumer	£143,370
10.	Brennans Bread	£135,920
11.	easyJet	£132,610
12.	NI Human Rights Comm	£129,755
13.	Axa Insurance	£128,985
14.	Health & Safety Exec	£119,785
15.	NI Tourist Board	£119,627
16.	Drumbo Park	£114,842
17.	HPA - Children & Young People	£113,285
18.	Lucozade Energy	£109,813
19.	Surf	£109,275
20.	Falcon	£106,710

NI Top 10 Categories



Stg £Ms



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 or James Byrne on 01 668 2900 or colum@pmlgroup.ie; james@pmlgroup.ie

