

Out of Home Market Review

Q1-3 2010

(Cycles 1-20)



Overall Market Value

Q1-3 2010
€152.1m



Q1-3 2009
€150.0m

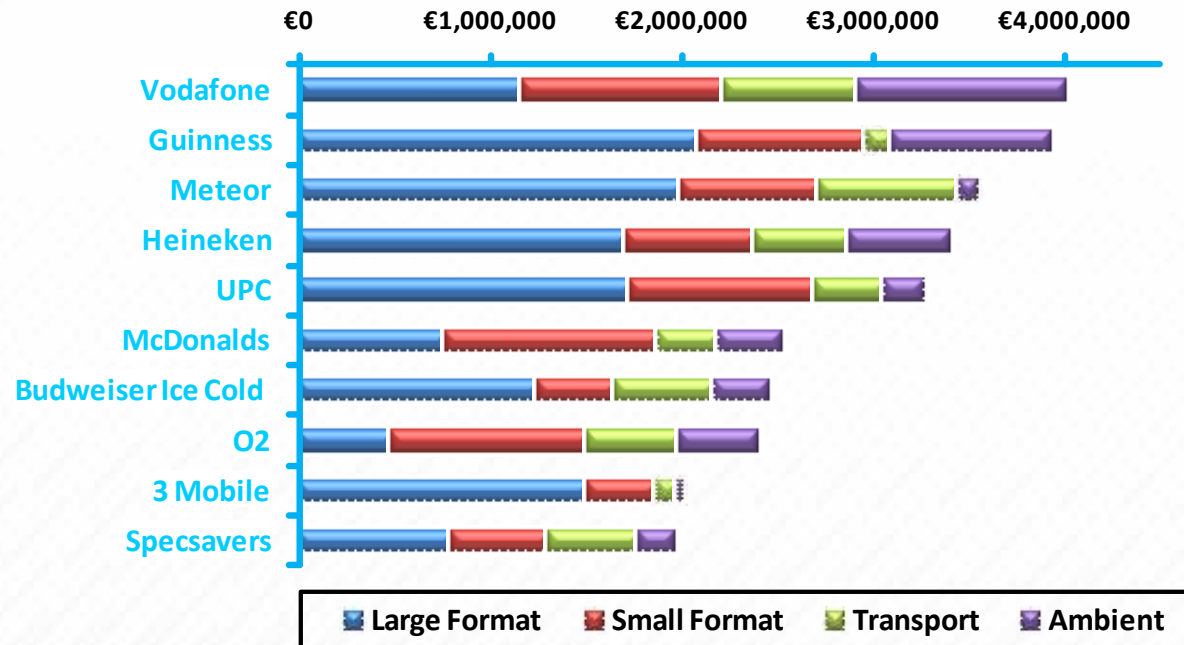
1% Difference

Figures are based on display value

Figures are based on media owner rate cards

ROI Top Brands

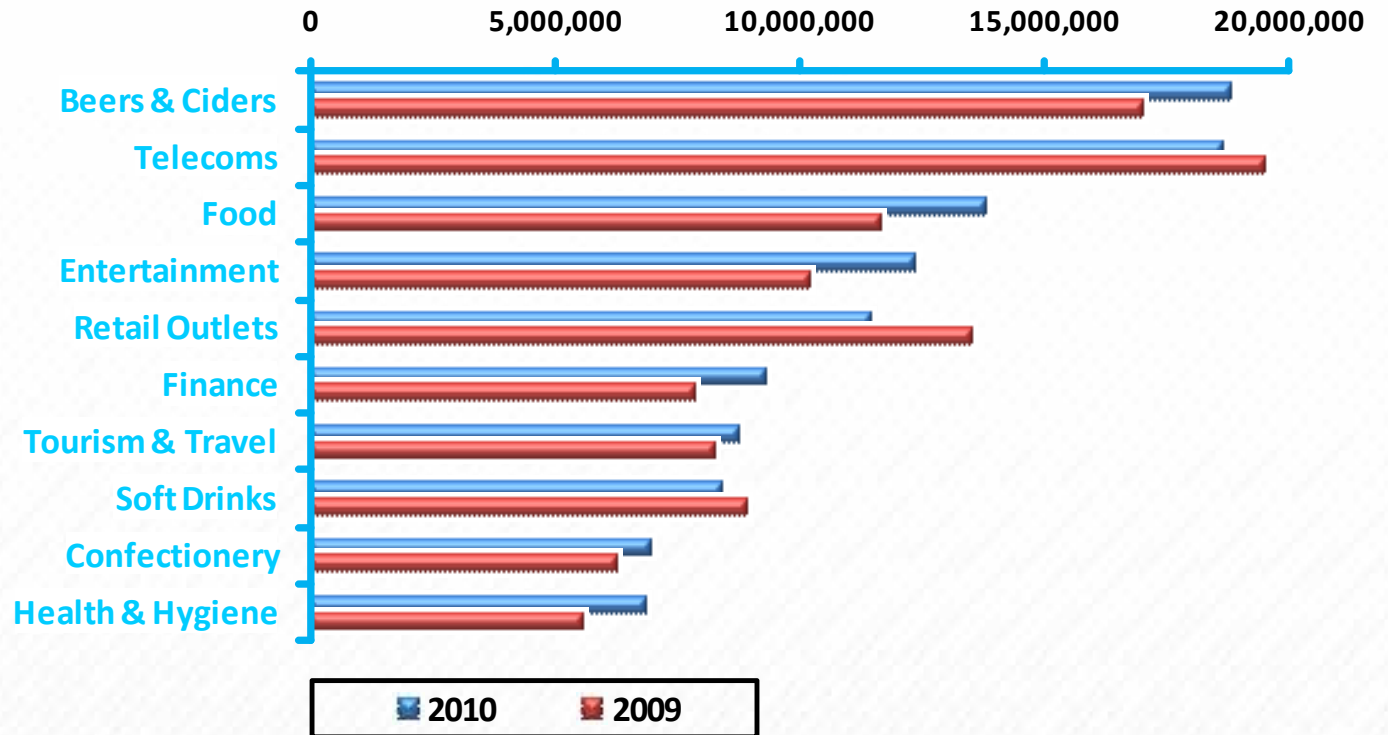
1.	Vodafone	€4,003,391
2.	Guinness	€3,925,944
3.	Meteor	€3,545,003
4.	Heineken	€3,400,881
5.	upc	€3,256,656
6.	McDonalds	€2,517,627
7.	Budweiser Ice Cold	€2,454,440
8.	O2	€2,395,995
9.	3 Mobile	€2,003,644
10.	Specsavers	€1,964,282
11.	Coors Light	€1,903,064
12.	VHI Healthcare	€1,676,640
13.	Lucozade Energy	€1,548,117
14.	Carlsberg Lager	€1,519,037
15.	Coca Cola	€1,437,750
16.	Ulster Bank	€1,340,857
17.	Lyons Tea	€1,203,487
18.	7UP	€1,183,733
19.	Bord Bia	€1,091,590
20.	Bank of Ireland	€1,076,088



Figures are based on display value and media owner rate cards

ROI Top Categories

1.	Beers & Ciders	€18,784,08
2.	Telecoms	€18,620,16
3.	Food	€13,793,65
4.	Entertainment	€12,363,09
5.	Retail Outlets	€11,428,70
6.	Finance	€9,327,395
7.	Tourism & Travel	€8,773,915
8.	Soft Drinks	€8,421,049
9.	Confectionery	€6,951,046
10.	Health & Hygiene	€6,878,619
11.	Media	€6,712,924
12.	Motor Trade	€3,710,277
13.	Wines & Spirits	€3,319,769
14.	Hot Drinks	€2,148,521
15.	Industry & Commerce	€1,857,653



Figures are based on display value and media owner rate cards

Top 10 Advertisers

Rank	Advertiser	Brands Advertised	Display Value
1.	Diageo Ireland	Budweiser, Guinness Rugby, Guinness - Arthur's Day Celebration, Carlsberg, Guinness Hurling, Smithwick's, Carlsberg Comedy Carnival, Smirnoff Flavours	€9,257,047
2.	Heineken Ireland	Coors Light, Heineken Lager, Beamish, Heineken Cup, Murphy's, Oxegen	€7,120,912
3.	Unilever	Dove Men + Care, Lyons Tea, Sure Deodorant, Persil Small & Mighty, Birds Eye, HB Magnum, Ben & Jerry's	€5,667,078
4.	eircom/Meteor	eircom - Next Generation Broadband, eMobile Meteor - Internet, Broadband, Sim Only, Top Up Offer, Coverage	€4,518,337
5.	Vodafone	Mobile Internet, Prepay, Broadband in a Box, iPhone, Roaming, Business, GAA	€4,003,391
6.	Coca Cola	Coca Cola, Coke Zero, Diet Coke, Fruice, Fanta	€3,561,109
7.	upc	Digital TV, Fibre Power Broadband and Home Phone	€3,256,656
8.	GSK	Lucozade Energy, Niquitin, Lucozade Sport, Panadol Extra, Ribena	€3,049,197
9.	Nestlé	Nestlé Cereals, Nestlé Kit Kat, Nestlé Aero, Rowntree Randoms, Rowntree Fruit Pastilles, Nestlé Polo Mints, Nestlé Milkybar Raisin & Biscuit	€2,641,926
10.	McDonald's	Eurosaver Menu, Wraps, Local Store Activity	€2,517,627

Figures are based on display value and media owner rate cards

Top 10 on Large Format

1. Guinness	€2,098,962
2. Meteor	€2,002,793
3. upc	€1,731,738
4. Heineken	€1,716,449
5. 3 Mobile	€1,510,528
6. Budweiser Ice Cold	€1,254,311
7. Vodafone	€1,174,052
8. Barnardos	€1,104,065
9. VHI Healthcare	€ 980,292
10. Coors Light	€ 905,937

Top 10 on Small Format

1. McDonald's	€1,111,370
2. Vodafone	€1,055,681
3. O2	€1,016,896
4. upc	€ 967,378
5. Guinness	€ 868,025
6. Coca Cola	€ 830,916
7. Bord Bia	€ 810,084
8. Meteor	€ 713,967
9. Heineken	€ 673,893
10. Bank of Ireland	€ 608,308



Top 10 on Transport

1. Meteor	€ 732,674
2. Vodafone	€ 693,715
3. Budweiser Ice Cold	€ 513,878
4. Heineken	€ 489,513
5. O2	€ 484,983
6. Specsavers	€ 470,622
7. Burgerking	€ 389,092
8. upc	€ 365,094
9. European Commission	€ 315,830
10. McDonalds	€ 313,168

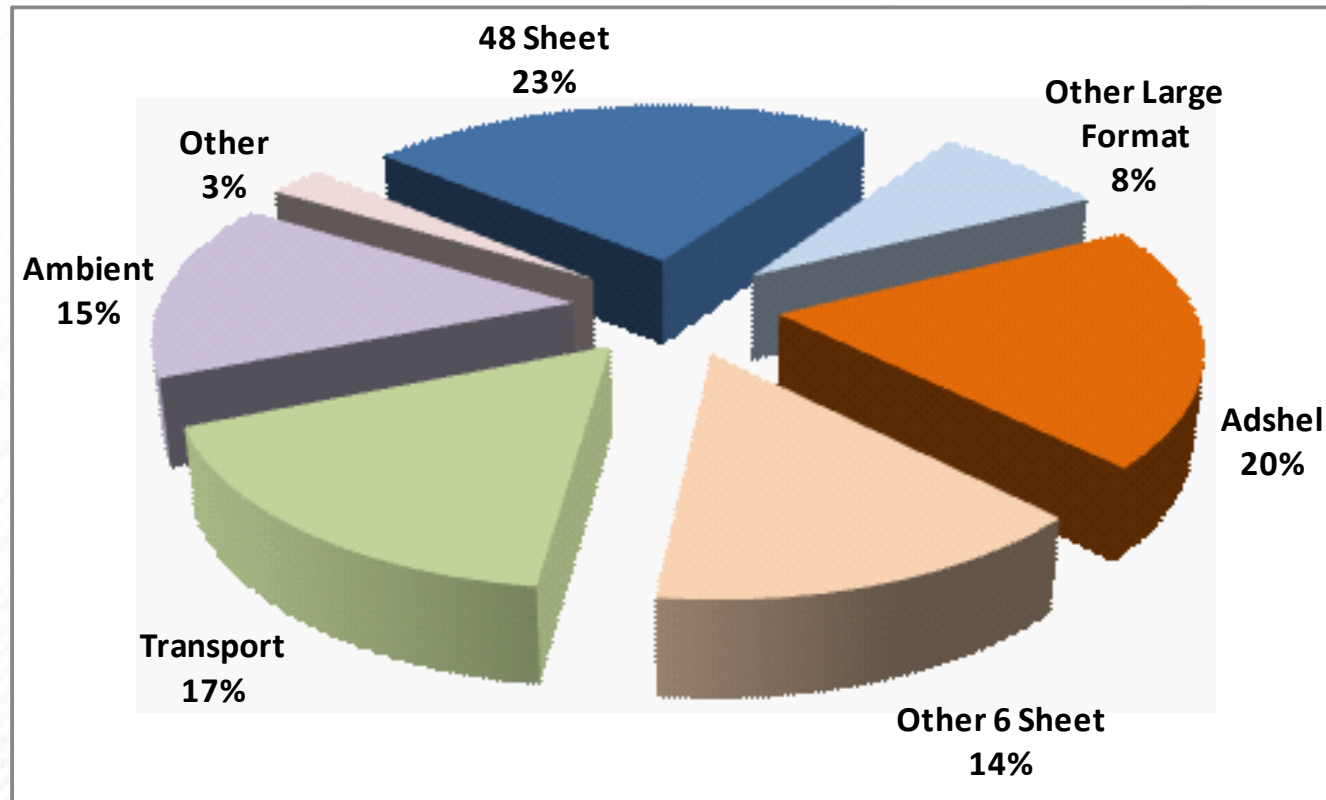
Top 10 on Ambient

1. Vodafone	€1,079,943
2. Guinness	€ 825,250
3. Coors Light	€ 824,736
4. SuperValu	€ 563,230
5. Ulster Bank	€ 544,724
6. Heineken	€ 521,026
7. Beamish Stout	€ 442,500
8. O2	€ 403,596
9. Nestle Cereals	€ 396,950
10. 7UP	€ 387,549



Figures are based on display value and media owner rate cards

Republic of Ireland - Breakdown by Format



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

Figures are based on display value and media owner rate cards

Northern Ireland



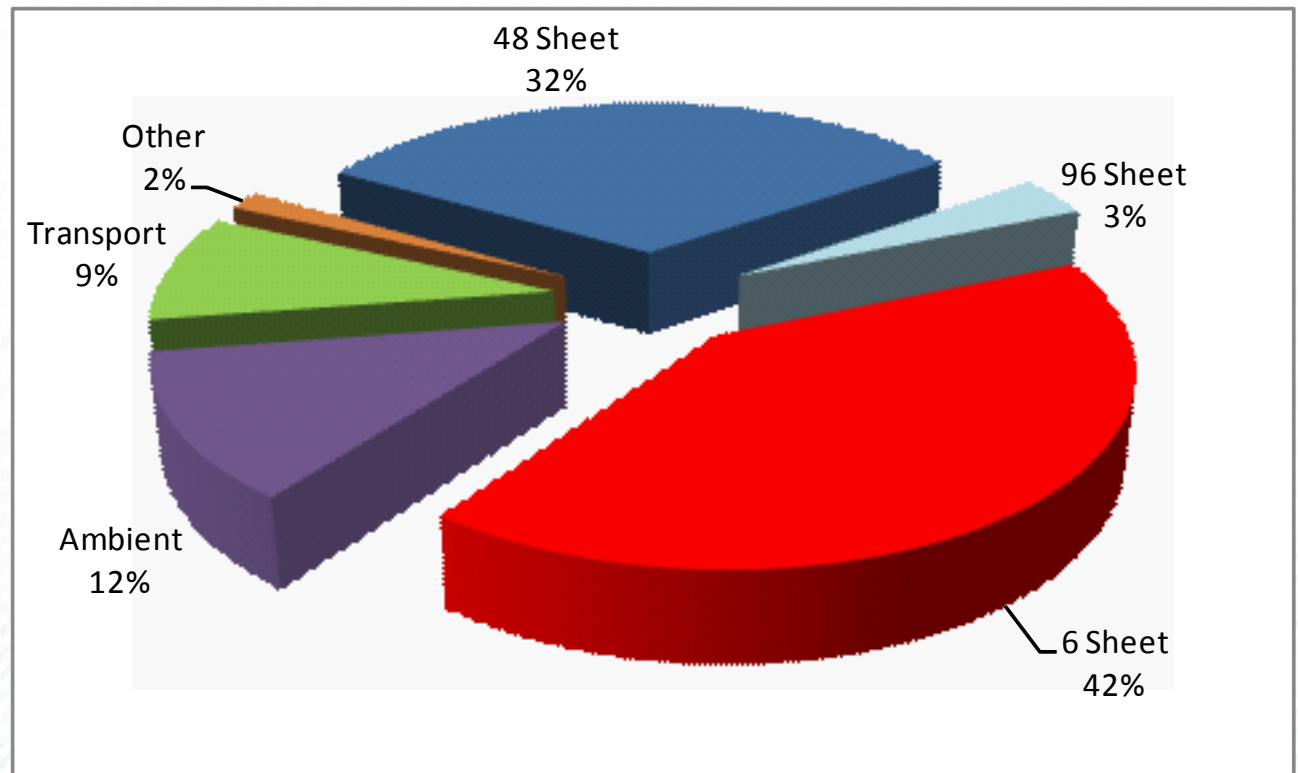
Northern Ireland Market

Overall Market Value

Q1-3 2010
£30.9m

v
Q1-3 2009
£31.3m

-1% difference

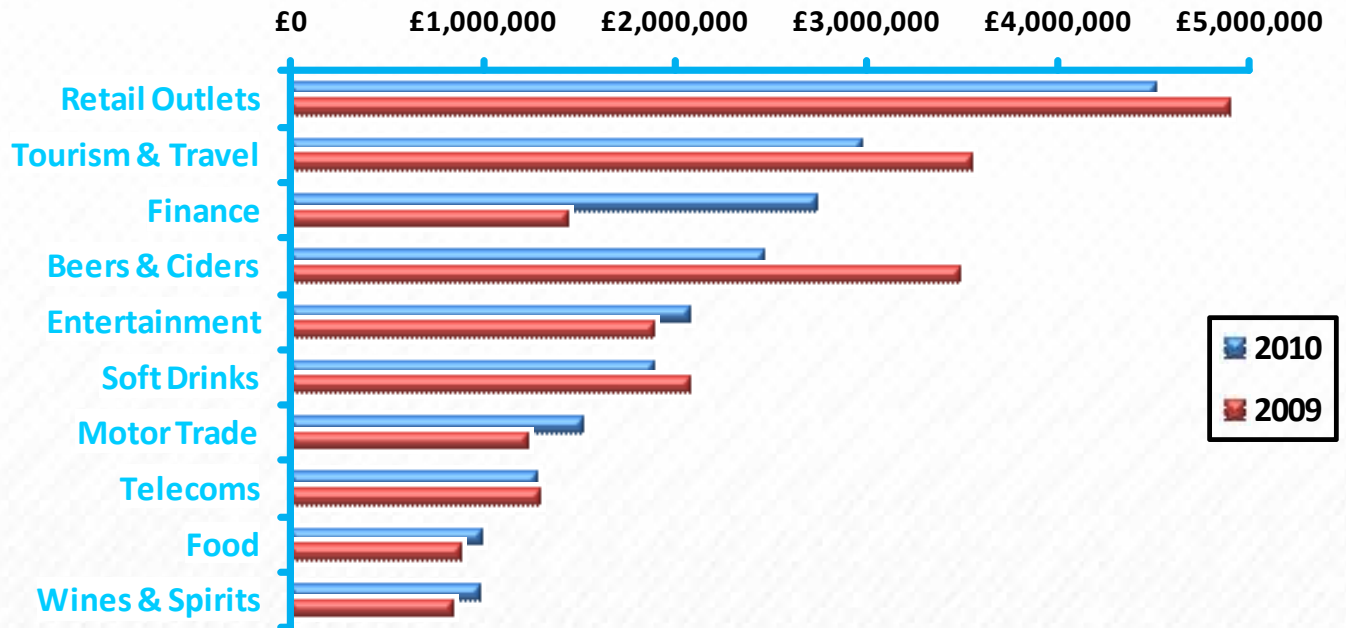


Figures are based on display value and media owner rate cards

NI Top Brands

1. KFC	£1,111,774
2. Ulster Bank	£ 991,186
3. McDonald's	£ 727,325
4. Northern Bank	£ 721,471
5. Harp Lager	£ 696,925
6. Coca Cola	£ 551,930
7. BT	£ 464,983
8. Northern Ireland Tourist Board	£ 455,747
9. NI Fire & Rescue Service	£ 358,114
10. Lucozade Energy	£ 329,160
11. Guinness	£ 344,837
12. Sky	£ 335,267
13. Brennans Bread	£ 271,535
14. Guinness Black Lager	£ 268,650
15. Action Cancer	£ 258,270
16. Jet2.com	£ 252,469
17. Lynx	£ 248,615
18. Spar	£ 244,292
19. easyJet	£ 240,870
20. Coke Zero	£ 231,930

NI Top Categories



Figures are based on display value and media owner rate cards

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

