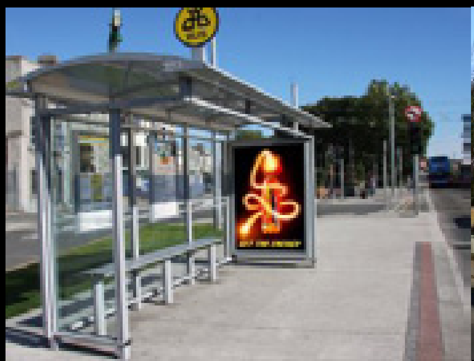
Out of Home Market Review
1st Half 2009

(Cycles 1 - 13)

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1st Half Summary

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Writing the opening line to a piece such as this is tricky, particularly given the year we have all experienced to date in 2009. Balancing a sense of positivity with a sense of reality is difficult. Yes, it has been a tough year and yes, it only half over! However, it would be wrong to look at 2009 to date in purely negative terms. There have been some very encouraging developments for the medium and there are signs of a better second half of the year to come.

One of the areas of encouragement has been the increased levels of activity among some key advertising categories. The Retail Sector, in particular supermarkets and convenience stores, has increased its presence on Out of Home significantly in the first half of 2009. Led mainly by advertisers such as Tesco, Dunnes Stores and SuperValu, the category has recorded an almost 40% increase in display value compared to the same period in 2008.

In many of their campaigns the advertising message has been simple and clear – price and value. Out of Home has proven adept in meeting the needs of these clients, whether in terms of straightforward value for money or in more strategic methods such as localized content and postings or targeted approaches via specific formats.
The 1st half of the year has also seen Tesco enter another hot bed of competition – the mobile telecoms sector. The telecoms category in general remains the top spending category on the medium by a clear margin. Its display value for cycles 1-13 is a healthy €12.5m, slightly down on 2008.

Overall, the display value for the entire market is more or less on par with 2008, although actual spend would have been lower than the same period last year. While some sectors have inevitably withdrawn some investment from all media, categories such as Films and Beers have shown increases in display values in 2009 on Out of Home.

Ambient Media has fared well for the first half of the year. Brand promotions and special offers have increased in importance and this has resulted in an increased level of advertising activity closer to the point of sale. An increase in brand switching has meant that brands now need to fight and shout louder to ensure their place on the shopping list. Brands are using ambient formats to influence purchasing decisions right up to the point of purchase. As a result, new formats such as shopping basket advertising and Store Points have sprung up in response to this demand.

Q3 will see the launch of the Dublin city council bike scheme, which brought Metropoles and Metropanels to Dublin streets last year. Sponsorship opportunities are available in relation to the scheme at present and details are available from PML Group. With the second Lisbon referendum now on the agenda and some traditionally busy times such as back to school, Halloween and Christmas on the way, there is good reason to believe that better times may be ahead.

- Colum Harmon

Overall Market Value

1st Half 2009	V	1st Half 2008
€96.5m		€96.0m

0.5% Difference

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

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1st Half 2009
Cycles 1-13

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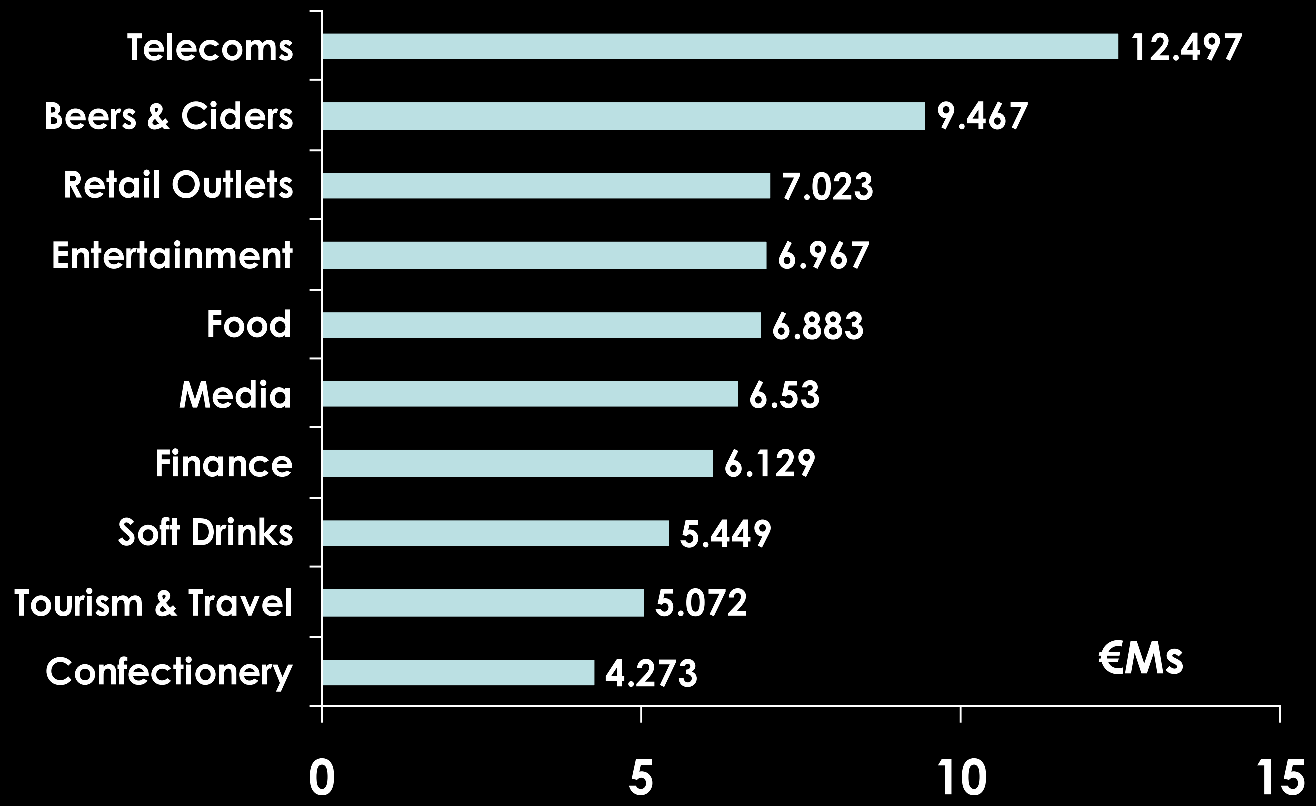
ROI Top 20 Brands

1. Heineken Lager	€2,299,244
2. Vodafone	€2,035,493
3. Guinness	€1,904,814
4. O2	€1,844,605
5. Hibernian Aviva	€1,755,013
6. Coca Cola	€1,654,180
7. 3 Mobile	€1,617,303
8. Eircom	€1,590,462
9. Tesco	€1,564,038
10. 11811	€1,560,683
11. Budweiser	€1,429,828
12. Meteor	€1,422,273
13. UPC	€1,313,758
14. Bank of Ireland	€1,169,795
15. 7UP Free	€1,135,493
16. SuperValu	€1,132,436
17. 4FM	€ 971,337
18. Carlsberg	€ 936,965
19. Meas Drink Aware	€ 815,942
20. Budget Travel	€ 773,487

ROI Top 10 Categories



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1st Half 2009

Cycles 1-13

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ROI Top 10 Advertisers 1st Half 2009

Rank	Advertiser	Brands Advertised	Display Value
1	Diageo	Guinness, Budweiser, Carlsberg, Smirnoff Cocktails	€4,821,079
2	Heineken Ireland	Heineken, Coors Light, Murphy's	€3,580,886
3	Eircom	11811, Internet & Phone Bundles	€3,202,145
4	Coca Cola	Burn, Coca Cola, Diet Coke, Sprite, River Rick	€3,117,023
5	Unilever	Ben & Jerry, Comfort, Dove, HB Ice Cream, Persil, Vaseline	€2,888,295
6	Kellogg's	Various Kellogg's cereals	€2,538,652
7	Vodafone	Various Vodafone products and services	€2,035,446
8	O2	Various O2 products and services	€1,967,155
9	Hibernian Aviva	Hibernian re-brand, Hibernian Aviva Health	€1,755,012
10	Tesco	Tesco Retail, Tesco Mobile	€1,564,038

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1st Half 2009

Cycles 1-13

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Top 10 on Large Format

1. Hibernian Aviva	€1,459,599
2. Heineken Lager	€1,122,927
3. Guinness	€ 941,698
4. Tesco	€ 940,146
5. Vodafone	€ 878,806
6. UPC	€ 870,272
7. 3 Mobile	€ 810,291
8. O2	€ 786,587
9. Budweiser	€ 690,189
10. Bord Gais	€ 513,038

Top 10 on 6 Sheets

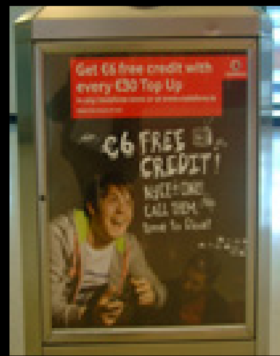
1. Eircom	€1,074,704
2. 11811	€ 967,572
3. Coca Cola	€ 784,785
4. Bank of Ireland	€ 672,405
5. Heineken Lager	€ 609,876
6. McDonald's	€ 504,766
7. 7UP Free	€ 483,867
8. Tesco	€ 465,046
9. Comfort Concentrate	€ 391,121
10. Bord Bia	€ 376,650

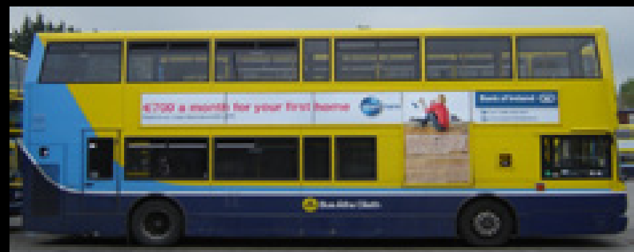
Top 10 on Transit

1. Meteor	€659,786
2. O2	€535,853
3. 11811	€420,457
4. Bank of Ireland	€359,371
5. 4FM	€357,595
6. 3 Mobile	€315,195
7. Burgerking	€309,430
8. 7UP Free	€288,782
9. Vodafone	€278,959
10. Guinness	€258,375

Top 10 on Ambient

1. Coca Cola	€484,286
2. Vodafone	€412,750
3. Eircom	€343,254
4. Budweiser	€333,324
5. O2	€295,007
6. Guinness	€221,161
7. Heineken Lager	€217,773
8. 7UP Free	€195,788
9. 11811	€167,774
10. Nicorette	€159,560





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Cycles 1-13

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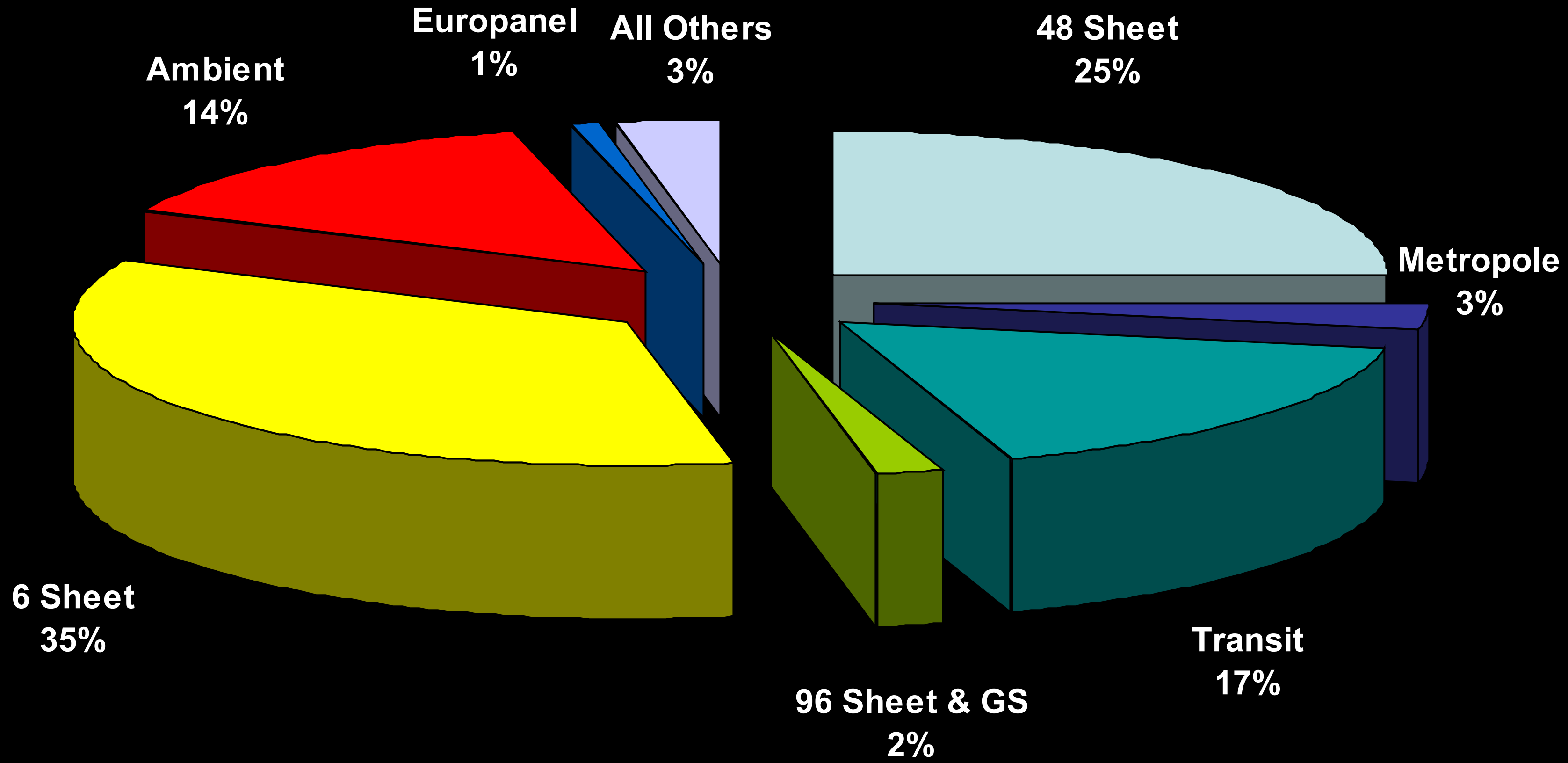
Republic of Ireland - Breakdown by Format



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

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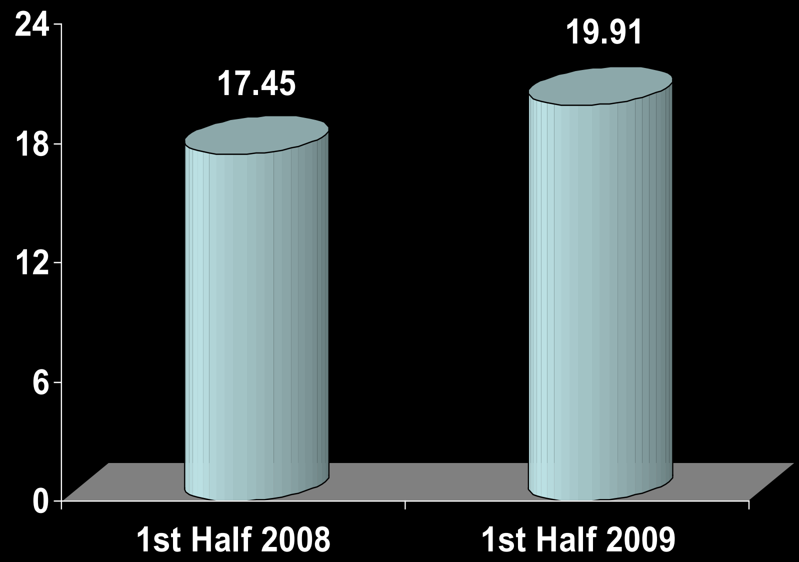
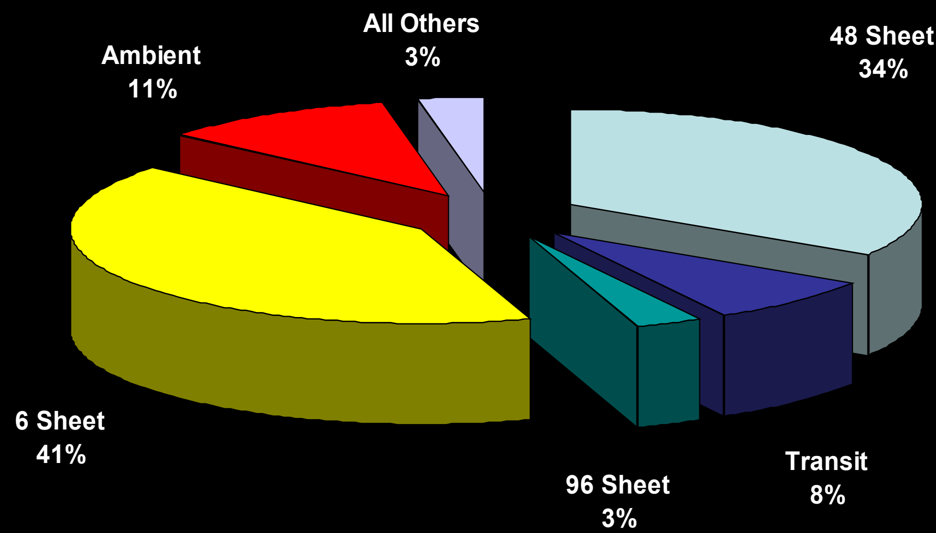
Northern Ireland Market

Overall Market Value
Stg £Ms



2009 includes Ambient Media

NI Format Breakdown
1st Half 2009



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1st Half 2009

Cycles 1-13

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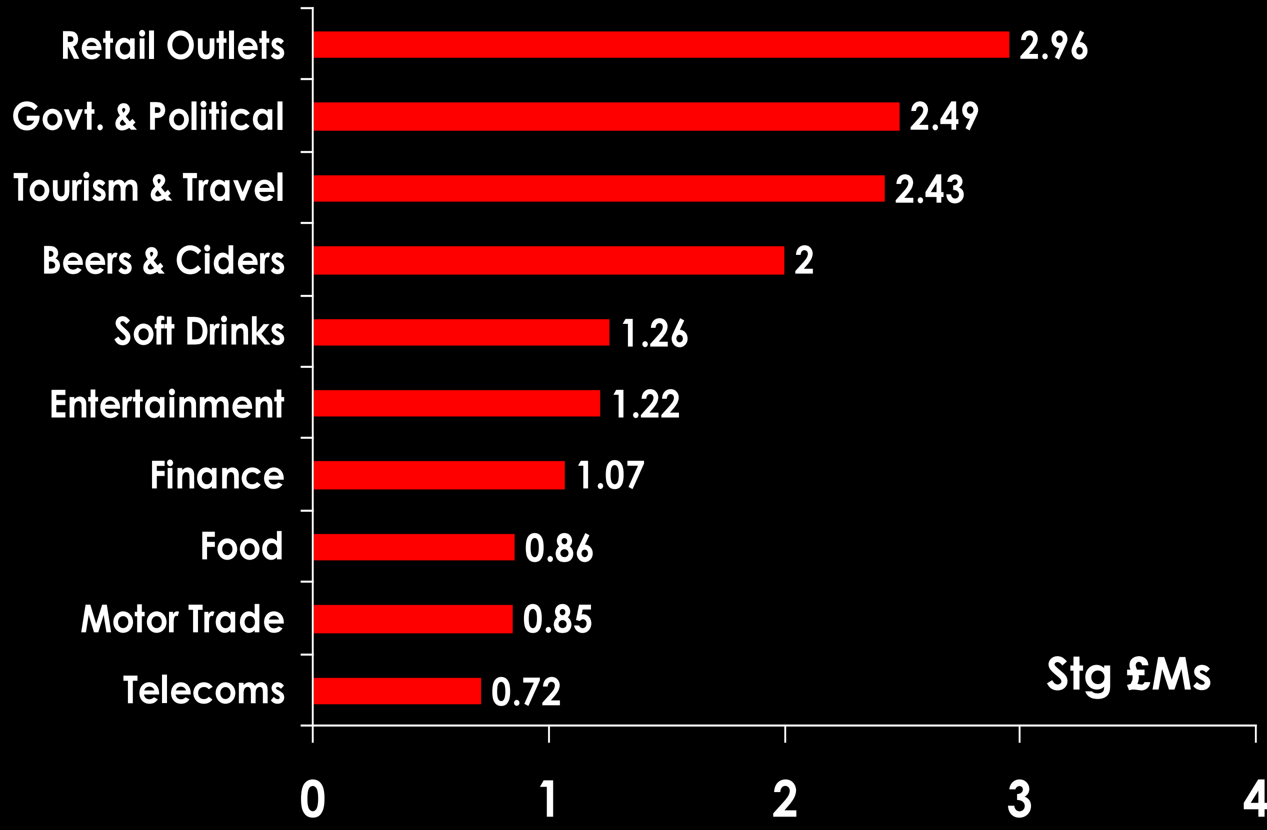
NI Top 20 Brands

1. KFC	£873,520
2. NI Fire & Rescue	£570,715
3. Health Promotion Agency	£538,170
4. Guinness	£489,735
5. McDonald's	£426,060
6. Harp Lager	£378,103
7. Coca Cola	£372,290
8. NI Tourist Board	£298,369
9. Northern Bank	£296,215
10. Vodafone	£292,801
11. Aer Lingus	£288,514
12. Ulster Bank	£275,160
13. Magner's Original	£275,009
14. Coors Light	£261,468
15. Odyssey Arena	£253,475
16. Simon Community	£234,865
17. BT	£229,104
18. easyJet	£219,879
19. Lucozade	£218,840
20. Invest NI	£198,880

NI Top 10 Categories



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1st Half 2009
Cycles 1-13

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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:
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