

Out of Home Market Review

1st Half 2010

(Cycles 1-13)



Overall Market Value

1st Half 2010
€98.4m



1st Half 2009
€96.6m

2% Difference

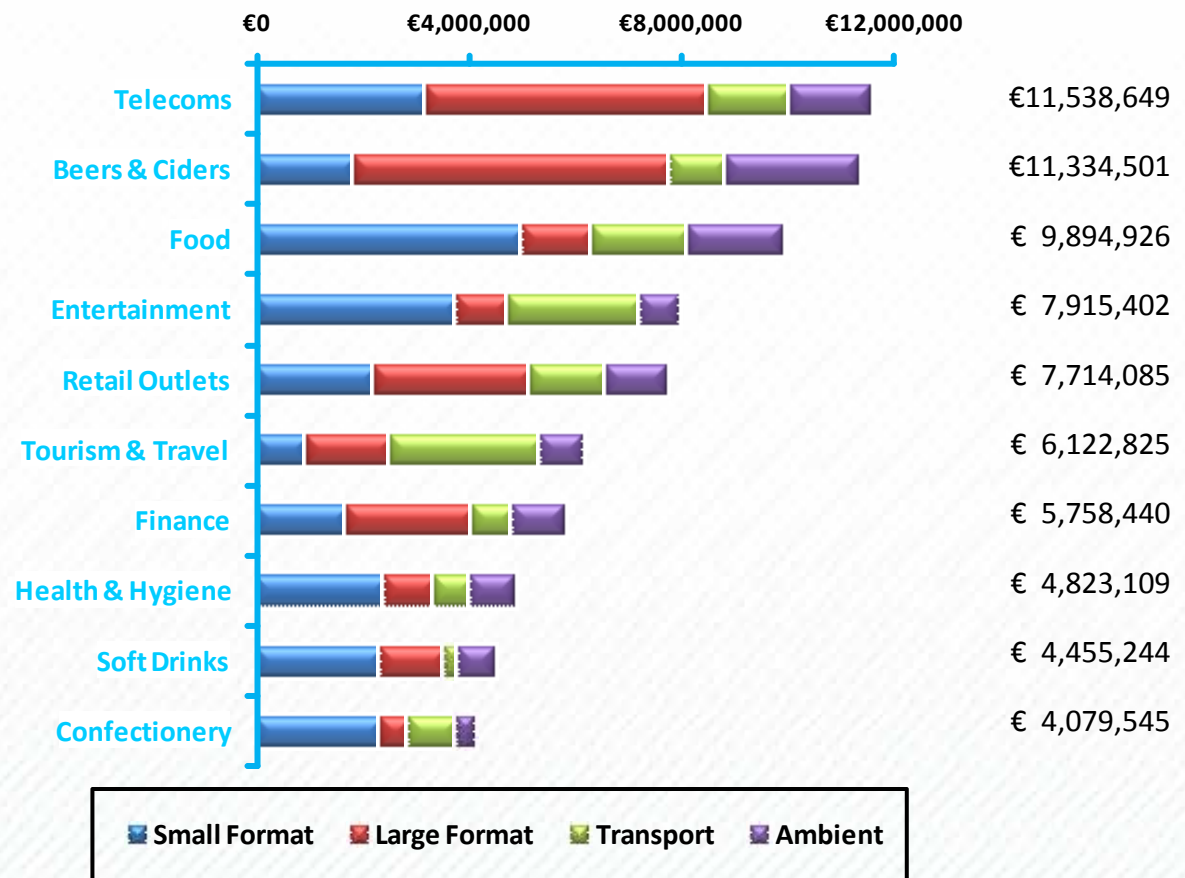
Figures are based on display value

Figures are based on media owner rate cards

ROI Top 20 Brands

1. Vodafone	€2,577,752
2. Guinness	€2,396,662
3. UPC	€2,161,195
4. Heineken	€2,160,080
5. McDonald's	€2,004,382
6. 3 Mobile Network	€1,688,307
7. Specsavers	€1,511,088
8. O2	€1,453,588
9. Meteor	€1,421,440
10. Budweiser Ice Cold	€1,346,719
11. Coors Light	€1,334,886
12. Lyons Tea	€1,020,711
13. Coca Cola	€1,012,737
14. Bank of Ireland	€ 959,037
15. Beamish Stout	€ 845,027
16. Cadbury Creme Egg	€ 777,797
17. Lucozade Energy	€ 730,440
18. Aviva	€ 695,121
19. SuperValu	€ 668,212
20. Kellogg's Special K	€ 665,017

ROI Top Categories



Top 10 Advertisers

Rank	Advertiser	Brands Advertised	Display Value
1.	Diageo Ireland	Budweiser, Carlsberg Lager, Guinness Rugby Guinness Hurling, Guinness Draught, Smithwick's, Smirnoff Cocktails, Carlsberg Cat Laughs	€5,301,503
2.	Heineken Ireland	Heineken Lager, Coors Light, Beamish, Heineken Cup, Murphys, Heineken Oxegen	€4,828,337
3.	Unilever	Dove Men + Care, Birds Eye, Lyons Tea, HB Magnum, Sure Deodorant, Lynx Twist Surf Twilight Sensations	€3,786,990
4.	Vodafone	Mobile Internet, Broadband in a Box, iPhone, GAA, Business	€2,577,752
5.	UPC	TV - Broadband - Phone	€2,161,195
6.	eircom-Meteor	Meteor Internet, Coverage, eircom Broadband, 11811	€2,020,312
7.	McDonald's	Eurosaver, Wraps	€2,004,392
8.	Kellogg's	Special K, Nutri-Grain, Rice Krispies	€1,989,019
9.	Coca Cola	Coca Cola, Fruice, Coke Zero, Fanta	€1,944,879
10.	GSK	Lucozade Energy, Niquitin, Panadol Extra, Panadol Advance	€1,766,076

Top 10 on Large Format

1. UPC	€1,074,213
2. Guinness Rugby	€ 796,484
3. Coors Light	€ 762,775
4. 3 Mobile Network	€ 728,508
5. Budweiser Ice Cold	€ 662,247
6. Specsavers	€ 649,003
7. Aviva	€ 575,081
8. Heineken Lager	€ 521,803
9. Lucozade Energy	€ 511,278
10. AXA Insurance	€ 502,959

Top 10 on 6 Sheets

1. UPC	€ 658,360
2. Coca Cola	€ 526,124
3. McDonald's Euro saver	€ 506,919
4. Cadbury Crème Egg	€ 503,888
5. Kellogg's Rice Krispie Squares	€ 411,894
6. Specsavers	€ 406,197
7. O2 - Broadband	€ 383,115
8. Denny Foods	€ 346,766
9. How To Train Your Dragon - Paramount	€ 343,375
10. Tesco Mobile	€ 309,898

Top 10 on Transport

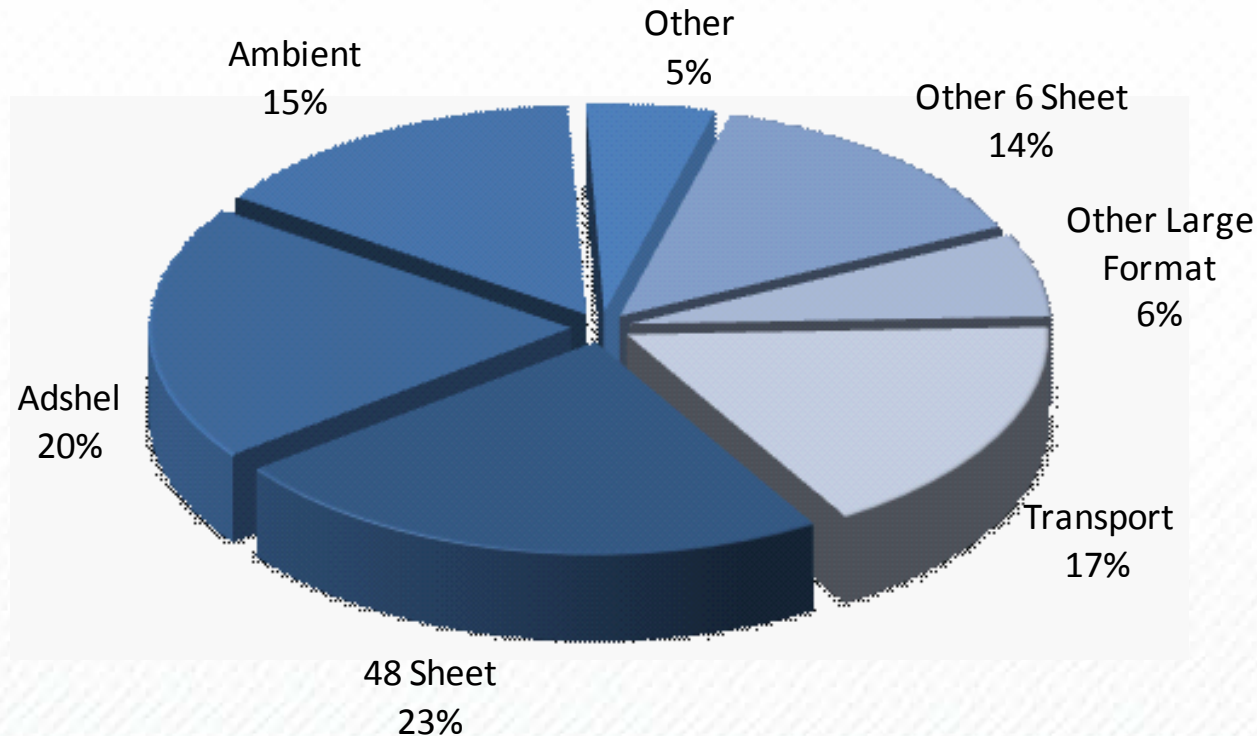
1. Roma Foods	€ 309,525
2. Specsavers	€ 299,538
3. UPC	€ 287,472
4. Kellogg's Nutri Grain Rugby	€ 245,710
5. Budweiser Ice Cold	€ 222,366
6. O2 - Prepay	€ 221,716
7. European Commission - Gender Pay Gap	€ 218,495
8. Heineken Lager	€ 210,017
9. Bank of Ireland - Mortgages	€ 200,013
10. Nestlé Kit Kat	€ 192,299

Top 10 on Ambient

1. Coors Light	€ 554,736
2. Beamish Stout	€ 397,500
3. Planyourbreak.com	€ 331,494
4. Ulster Bank	€ 280,112
5. Jagermeister	€ 272,095
6. Bulmers Original	€ 263,436
7. Guinness Rugby	€ 255,565
8. Nestlé Cereals	€ 229,700
9. O2	€ 226,775
10. Tesco Mobile	€ 219,750



Republic of Ireland - Breakdown by Format



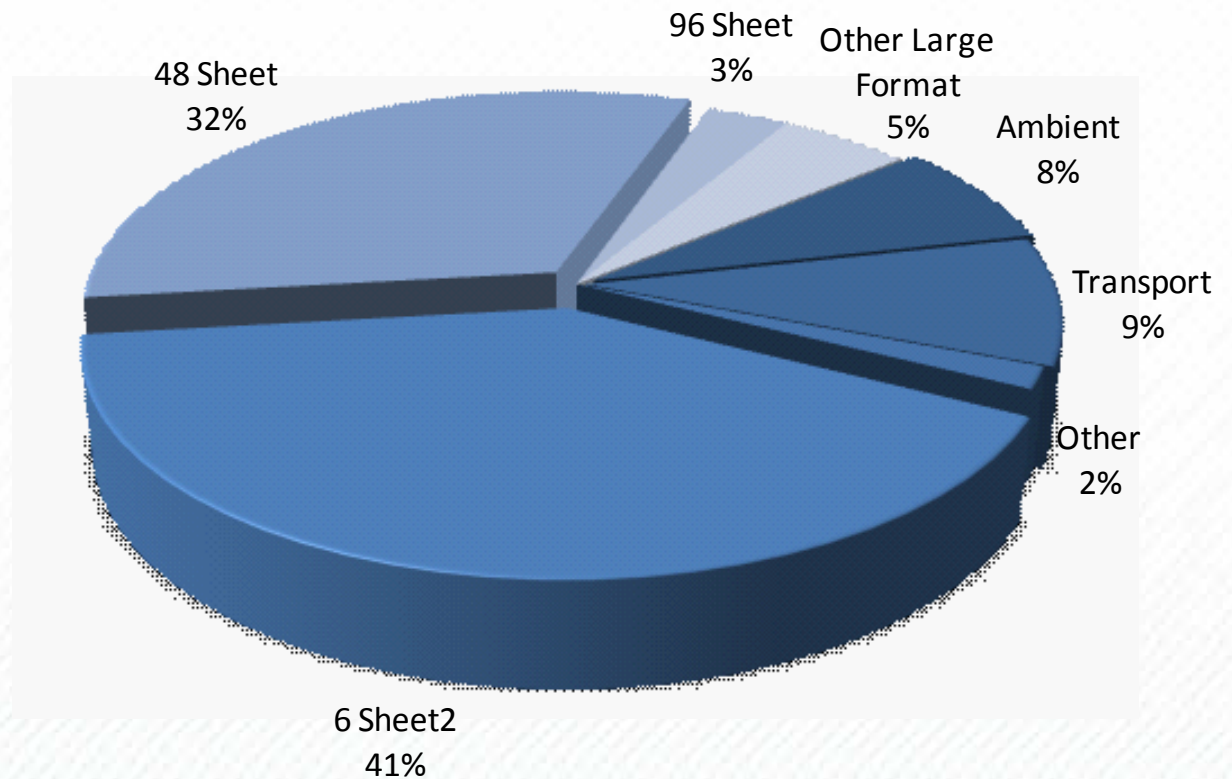
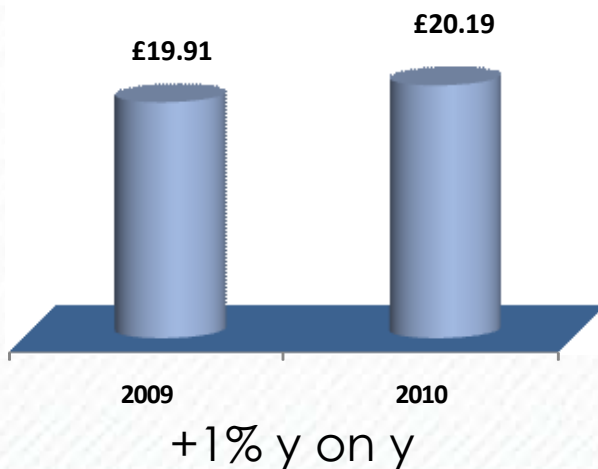
Others include: Impact Units, 12 Sheets, Bridges, etc...

Northern Ireland



Northern Ireland Market

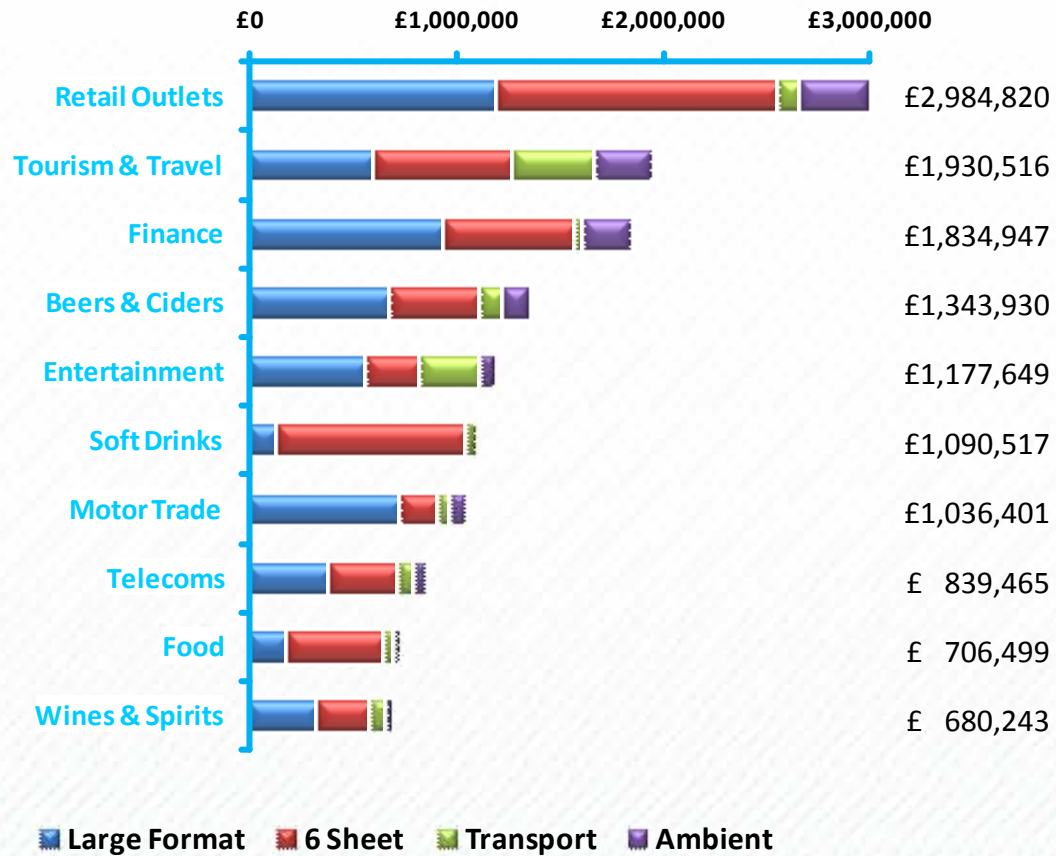
Overall Market Value
1st Half 2010
Stg £Ms



NI Top 20 Brands

1. KFC	£831,343
2. Ulster Bank	£662,089
3. Northern Bank	£484,828
4. McDonald's	£449,640
5. Harp Lager	£443,470
6. Coca Cola	£419,260
7. Oxfam	£373,190
8. Northern Ireland Tourist Board	£308,101
9. easyJet	£186,445
10. Mencap	£186,360
11. NI Fire & Rescue Service	£185,795
12. Orange Consumer	£180,908
13. Botanic Inns Limited	£178,016
14. Lucozade Energy	£176,862
15. Airtricity	£174,655
16. D.O.E - Road Safety	£170,118
17. Lynx	£169,305
18. Action Cancer	£156,940
19. Guinness - Black Lager	£156,238
20. Brennans Bread	£156,095

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

