



out of home Market Review 2010



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According to our Posterwatch figures for 2010, the total display value of the out of home market in 2010 was just under €200m. The figure for 2009 was €203.2, although 2009 included an extra one week cycle at the end of the year – cycle 27. Therefore, comparing like for like, the value of the market was static in 2010.

It is important to note that these values are based on rate card and include all display, whether paid for or not. In real terms, the market was slightly down on 2009 and about 25% down on its peak in 2008. Advertising budgets have decreased across the board but out of home has maintained its presence on the media schedules of large and small advertisers alike and some of its unique attributes make it indispensable for what advertisers are trying to achieve.

“Our outdoor campaign was essential to raise credible awareness of our category leadership” - **Chris Wooff, Budweiser Brand Team, Diageo**

“We needed to ensure that the rebrand was as cost effective as possible but at the same time we had to reassure the consumer that UPC was the brand that could deliver their entertainment and communication needs. Out of home provided us with a way of doing this by using and creating executions that stood out” - **Rhona Bradshaw, Head of Marketing, UPC**

“The annual Trocaire Lenten campaign is one of our main fundraising initiatives. Outdoor was key to driving awareness for the campaign early in the Lenten period” - **Natalie O’Toole, Fundraising and Marketing Manager, Trocaire.**

The medium is in constant development as technology opens up possibilities in terms of new formats and applications. Digital is growing slowly but 2011 will see major additions in this area. Interactivity, through innovations such as QR codes and opinionators are readily available and were used to great effect in 2010 by Nestlé Polo Mints, among others.

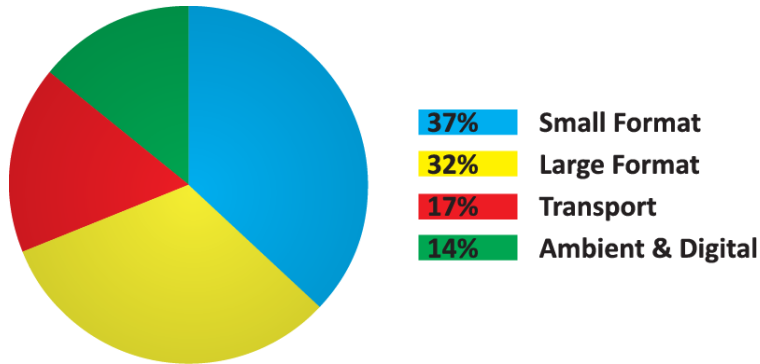
2010 saw Bravo retain the CIE contract, JCDecaux added to the Luas inventory and look set to expand the Dublin Bike Scheme, CBS point of sale options grew and Clear Channel continued to provide innovative options on the 6 Sheet format.



Engaging Audiences: Nestlé Polo Opinionators

Although Ireland did not qualify for the World Cup, the medium did benefit from the football frenzy. Product launches were also a welcome feature in 2010 with large scale campaigns for the likes of eircom eMobile and Bulmers Berry as well as relaunches such as that for UPC.

ROI Format Breakdown 2010



ROI Top 10 Advertisers 2010

1	Diageo	€ 10,984,688
2	Heineken Ireland	€ 9,198,191
3	eircom/Meteor	€ 8,372,276
4	Unilever	€ 7,203,136
5	Vodafone	€ 5,551,739
6	Coca Cola	€ 4,828,975
7	Nestlé	€ 4,316,452
8	UPC	€ 3,622,108
9	GSK	€ 3,418,671
10	Kellogg's	€ 2,991,727

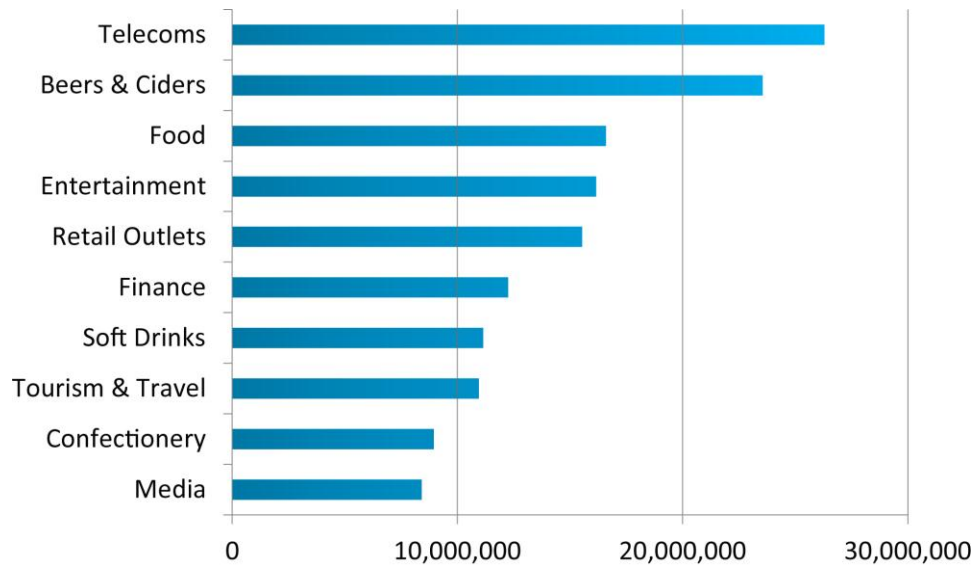
The table above shows the top 10 advertisers in 2010, based on display values.

Diageo had the highest level of display in 2010, at almost €11m. This is made up of a combination of a number of brands and campaigns including Guinness Arthur's Day, Budweiser Ice Cold and Carlsberg Comedy.

The launch of eMobile and ongoing campaigns for Meteor made the eircom group the top telecoms advertiser on the medium in 2010. UPC rebranded in 2010 and with out of home playing a major role in this process, the brand features in the top 10 at number 8.

Top food advertiser was Nestlé, with display value of over €4.3m. Various confectionery products, cereals and coffee made up this total. Other advertisers to feature in the top 10 include Vodafone, GSK and Kellogg's.

ROI Top 10 Categories 2010



Looking now at categories of advertisers, Posterwatch reveals that Telecoms was most active in 2010. The category as a whole had a display value in excess of €26m. This includes mobile operators, handset producers, internet providers etc...

eircom Group, Vodafone and UPC make up about 2/3 of this value, with a combined value of over €17m. Beers and Ciders come in at 2nd place, with the category dominated by two advertisers – Diageo and Heineken.

Although Telecoms and Beers & Ciders are the top two categories, both have decreased in value compared to 2009. However, the next two most popular categories both increased in value in 2010. These were the Food and Entertainment categories. As more point of sale formats have come on board, such as Trolley Bays, Digital Screens and Store Points etc..food advertisers are competing more and more at point of purchase.



Effective Communication: eMobile launch on ooh

Top campaigns in the entertainment sector included the films 'How to Train Your Dragon' and 'The A-Team'.

ROI Top 20 Brands 2010

Below are the top 20 individual brands on ooh in 2010. The top 5 are very much dominated by Telecoms and Beer brands. All the below values include sponsorship activity e.g. Heineken Cup included in Heineken Lager figure.

Apart from Beers and Telecoms, major brands on ooh last year included McDonald's, Specsavers and Coca Cola.

1	Meteor	€ 6,431,308	11	Coca Cola	€ 2,304,459
2	Vodafone	€ 5,551,739	12	Ulster Bank	€ 2,268,549
3	Guinness	€ 4,767,852	13	Carlsberg Lager	€ 2,186,233
4	Heineken Lager	€ 4,684,895	14	3 Mobile	€ 2,159,633
5	UPC	€ 3,622,558	15	VHI	€ 1,984,354
6	McDonald's	€ 2,687,504	16	Lucozade Energy	€ 1,700,303
7	O2	€ 2,608,289	17	SuperValu	€ 1,226,685
8	Budweiser	€ 2,530,080	18	Beamish Stout	€ 1,194,588
9	Specsavers	€ 2,399,612	19	eMobile	€ 1,058,976
10	Coors Light	€ 2,358,661	20	Lyons Tea	€ 1,034,135

The tables below display the top brands on each of the main format types in 2010 – Large Format, 6 Sheet and Transport. Similar information on the Ambient and Digital markets can be obtained from our AmbientPlus annual report at www.ambientplus.ie.

ROI Top Brands 2010 by Format Type

Large Format

1.	Meteor	€ 3,360,623
2.	Heineken	€ 2,136,081
3.	Guinness	€ 1,967,440
4.	UPC	€ 1,806,741
5.	Vodafone	€ 1,575,697
6.	Carlsberg	€ 1,242,622
7.	VHI	€ 1,195,562
8.	3 Mobile	€ 1,082,640
9.	Coors Light	€ 1,044,186
10.	Budweiser	€ 1,041,811



Standing out: Guinness on Metropole

6 Sheets

1.	Vodafone	€ 1,389,755
2.	Meteor	€ 1,309,280
3.	Coca Cola	€ 1,204,860
4.	McDonald's	€ 1,219,019
5.	Guinness	€ 1,095,312
6.	O2	€ 1,029,949
7.	UPC	€ 964,564
8.	Tesco	€ 932,467
9.	Heineken	€ 926,457
10.	Lucozade Energy	€ 638,649



Market domination: McDonald's Euro Saver on 6 Sheet

Transport

1.	Meteor	€1,345,470
2.	Vodafone	€ 830,316
3.	Heineken	€ 588,232
4.	Specsavers	€ 584,667
5.	O2	€ 531,777
6.	Budweiser	€ 523,888
7.	UPC	€ 416,256
8.	McDonald's	€ 332,898
9.	Roma Foods	€ 312,775
10.	Lyons Tea	€ 287,370



Moving up: Vodafone on Dublin Bus T-Side

Meteor were by far the largest brand on large formats in 2010, more than €1m in display value ahead of Heineken Lager and Guinness. Large formats include 48 Sheets, Europanel, Metropoles, 96 Sheets and Golden Squares.

The effectiveness and value of multi-format campaigns can be seen in the fact that many of the top brands on large formats also appear on the top 10 lists for 6 sheets and transport. Indeed, four brands – Meteor, Vodafone, Heineken and UPC – appear on all three top 10 lists. Many more appear on two of the lists and a lot of these would also feature strongly in the ambient and digital areas also.

Vodafone were most active on 6 Sheets in 2010 with a display value of almost €1.4m. The 6 Sheet market continues to expand, with over 8,800 now available across roadside, transport and point of sale formats.

Conclusion

Like all media, out of home is facing its fair share of challenges in 2011. However, there are many reasons to be optimistic for our medium.

Our own iQ research and recent research by CBS Outdoor indicate that Irish people are spending a great deal of time out of home and using mobile technologies on the move. It means out of home is in a great position to communicate with consumers while they have the opportunity to investigate further or purchase. Point of sale opportunities are also expanding and it is an area where digital out of home is becoming most prominent.

Note: NI 2010 Posterwatch Update below.

NI 2010 Posterwatch Update

In Northern Ireland, the Posterwatch display value of the out of home market was £40.5m in 2010. Allowing for the additional one week cycle in 2009, the market display value for 2010 was static YoY compared to the 2009 figure of £41.4m.

Whilst many advertising budgets have contracted, the out of home industry in NI has benefited from new product launches, increased share of media budgets and the introduction of advertisers onto the medium. Most notably, there has been considerable growth in display value from the finance and grocery retail sector, particularly convenience store advertising.

In May 2010, the NI out of home industry launched JNOR. The Coverage & Frequency system is an extension of the research-based model already established in the Republic Of Ireland market and has been an important step forward in providing accountability to advertisers.

There has been significant investment by CBS



Influencing Purchase: Ballygowan on 6 Sheet

Outdoor through the development of their Retail 6 Sheet inventory. As well as expanding the coverage of panels across NI into more Tesco, Asda and Dunnes Stores, many of the displays have been repositioned to deliver increased consumer targeting.

NI Top 10 Advertisers 2010

1	Diageo	£ 2,419,752
2	Coca Cola	£ 1,785,806
3	KFC	£ 1,497,585
4	Ulster Bank	£ 1,480,912
5	Northern Bank	£ 937,930
6	Translink	£ 927,863
7	McDonald's	£ 917,105
8	NI Fire & Rescue Service	£ 767,272
9	C&C Group	£ 634,764
10	BT	£ 632,563

As in ROI, Diageo was the top advertiser in NI in terms of display value. With a total value of £2.42m, this included brands such as Harp Lager, Carlsberg Lager, Guinness and Bushmills Whiskey. In May 2010 Diageo launched Guinness Black Lager into the NI market, representing a display value of almost £350k of the total advertiser figure.

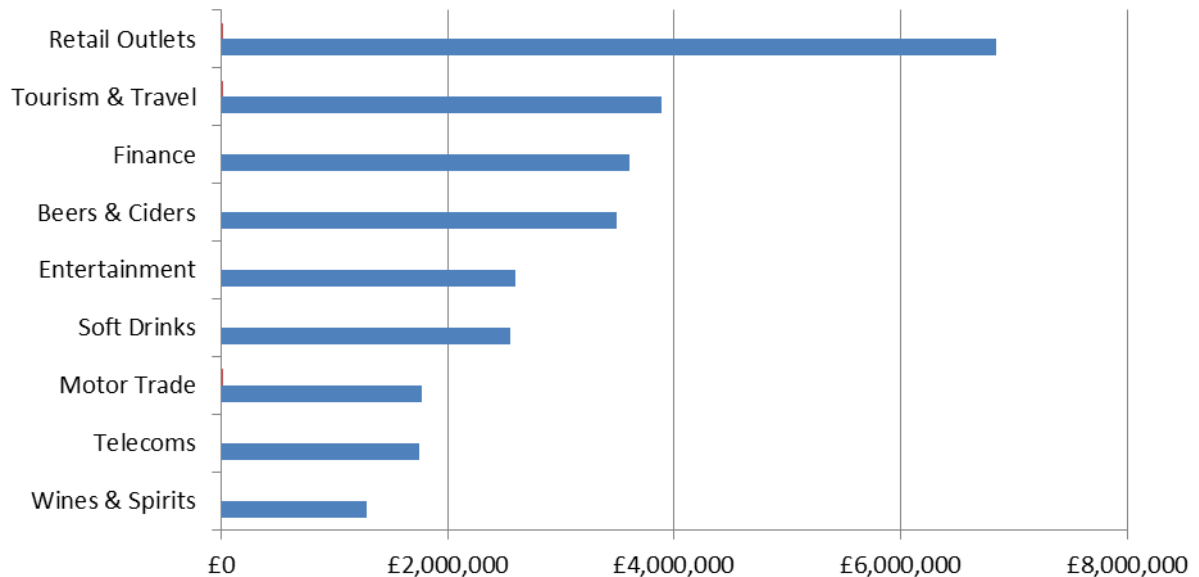
We saw an increase in activity for Tennent's Lager which has contributed to the C&C Group display value of £634,764. Other brands in their portfolio include Magners Irish Cider, Becks Vier and Budweiser.

Within the financial sector, both Ulster Bank and Northern Bank feature in the top 10 list as a result of regular activity throughout 2010 including long-term Airport branding.

The quick service restaurant (QSR) industry is well represented within the top 10 list by KFC in position 3 and McDonald's in position 7. Their combined values represent 85% of the total display value of the 'Restaurant/QSR' sector.

Other advertisers to feature in the top 10 include Coca Cola, Translink, NI Fire & Rescue Service and BT.

NI Top 10 Categories 2010



The top category of advertisers, according to Posterwatch, was Retail Outlets in 2010 with a total display value of £6.8m. The sector includes convenience retail, restaurants and shopping centres. The out of home market has seen an increase in the level of grocery retail activity in 2010, particularly from Asda, Lidl, Mace & Centra.

Despite an 11% reduction in display value of the Tourism & Travel sector when compared to 2009, it remains in 2nd position. In contrast, the value of activity from the finance sector has risen by 80% to £3.6m in 2010 compared to £2m in 2009. This is primarily the result of upweighted activity by Northern Bank and Ulster Bank but also increased spend from Santander following their rebranding.



Street Dominance: Northern Bank on Wrapped Adshel

The drinks industry is strongly represented within the top 10 sectors with Beers & Ciders in 4th position, Soft Drinks in 6th position and Wines & Spirits featuring in 10th position.

Other sectors featured in the top 10 include Entertainment, Motor Trade and Telecoms.

Detailed below are the top 20 individual brands on ooh in 2010. All values include sponsorship activity e.g. Guinness Rugby sponsorship is included in the Guinness figure.

Many of the drinks brands feature in the top 20 however other brands include Northern Ireland Tourist Board, Spar, Brennans Bread, Jet2.com and easyJet.

NI Top Brands 2010

1	KFC	£ 1,497,585	11	Carlsberg Lager	£ 399,763
2	Ulster Bank	£ 1,480,912	12	Lucozade Energy	£ 392,149
3	Coca Cola	£ 957,756	13	Spar	£ 361,566
4	Northern Bank	£ 937,930	14	D.O.E. Road Safety	£ 353,823
5	McDonald's	£ 917,105	15	Guinness Black	£ 349,355
6	NI Fire & Rescue	£ 767,272	16	Brennans Bread	£ 305,280
7	Harp Ice Cold	£ 739,783	17	Coors Light	£ 304,665
8	Guinness	£ 586,513	18	Tennent's Lager	£ 298,766
9	NI Tourist Board	£ 578,163	19	Jet2.com	£ 287,346
10	BT Consumer	£ 446,285	20	easyJet	£ 263,284