



 **Posterwatch**

**Out of home  
Market Review  
Q1-Q3 2011  
Cycles 1 - 20 (3 Jan - 2 Oct)**

## Out of home Market Review

Q1 - Q3 2011 (Cycles 1 - 20, 3 Jan - 2 Oct)



### Republic of Ireland

Our latest figures for the out of home market in Republic of Ireland, covering Q1-Q3 2011, measure the value of the market at €148m. The figure for the same period in 2010 was €152m. Given cycle 11 2011 was reduced to one week and therefore halved in value, the value of the market is on par with 2010. However, these figures are display values calculated at rate card. In real terms we estimate the market is still down by about 5% on 2010.

#### Top 10 Advertisers Q1-3 2011

1	<b>Unilever</b>	€ 7,507,382
2	<b>Diageo</b>	€ 7,207,865
3	<b>Heineken</b>	€ 5,008,136
4	<b>eircom Group</b>	€ 4,615,694
5	<b>Kraft</b>	€ 4,052,688
6	<b>Vodafone</b>	€ 3,925,983
7	<b>Coca Cola</b>	€ 3,436,017
8	<b>Nestlé</b>	€ 3,035,526
9	<b>Sky TV</b>	€ 2,881,530
10	<b>Kellogg's</b>	€ 2,761,924

#### Top 10 Advertisers Q3 2011 (Cycles 14-20)

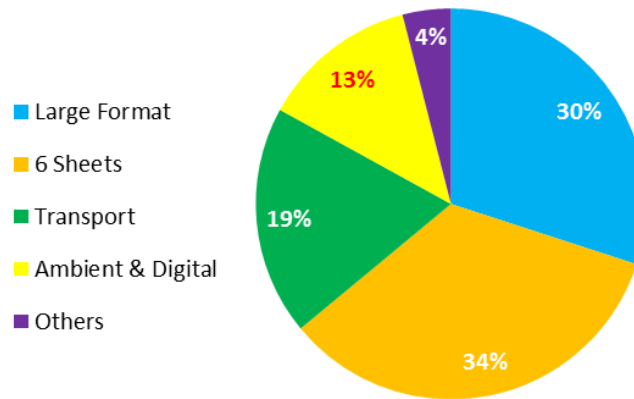
1	<b>Diageo</b>	€ 3,486,226
2	<b>Heineken</b>	€ 2,375,427
3	<b>Unilever</b>	€ 2,163,255
4	<b>eircom Group</b>	€ 1,717,213
5	<b>Kraft</b>	€ 1,634,029
6	<b>Vodafone</b>	€ 1,600,756
7	<b>Coca Cola</b>	€ 1,464,301
8	<b>Kellogg's</b>	€ 1,358,045
9	<b>PepsiCo</b>	€ 1,292,294
10	<b>Sky TV</b>	€ 1,081,996



Diageo's Guinness Arthur's Day on T-Side

Unilever are the most active advertiser on out of home in 2011, with a display value of €7.5m. Diageo are a close second at €7.2m. Looking at Q3 alone, Diageo were the busiest advertiser with activity including campaigns for Arthur's Day and the Rugby World Cup. Although a significant advertising category on out of home, the Beers & Ciders category has reduced its presence by about 23% on the medium in 2011. Diageo, Heineken and Bulmers Ltd have all significantly reduced share of voice on out of home this year.

The pie chart below shows the breakdown of the ROI market by the main out of home formats. As you can see, traditional large formats such as 48 Sheets and Golden Squares, and 6 Sheets account for approx. 2/3 of the entire market. The remaining 1/3 is mostly taken up by the various transport, ambient and digital displays. The “others” section contain items such as bridges , specials etc...48 Sheets alone account for 23% of market value, followed by Adshel 6 Sheets at 20%.

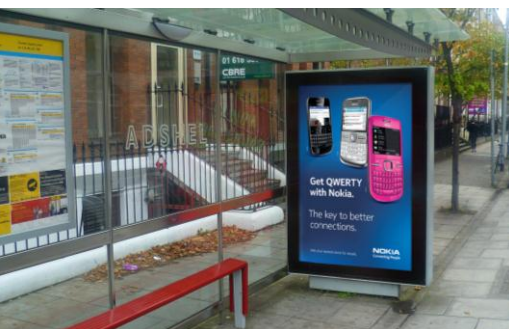


#### Top 10 Categories Q1-3 2011

1	Telecoms	€ 17,994,358
2	Beers & Ciders	€ 14,338,729
3	Food	€ 12,314,996
4	Film	€ 10,430,167
5	Confectionery	€ 9,214,550
6	Tourism & Travel	€ 7,902,101
7	Retail Outlets	€ 7,891,721
8	Media	€ 7,800,935
9	Finance	€ 7,317,342
10	Soft Drinks	€ 7,283,626

#### Top 10 Categories Q3 2011 (Cycles 14-20)

1	Beers & Ciders	€ 7,050,907
2	Telecoms	€ 5,804,263
3	Food	€ 4,239,504
4	Film	€ 3,863,836
5	Finance	€ 3,342,346
6	Soft Drinks	€ 3,272,036
7	Confectionery	€ 3,223,515
8	Media	€ 2,752,673
9	Tourism & Travel	€ 2,568,361
10	Retail Outlets	€ 2,440,443

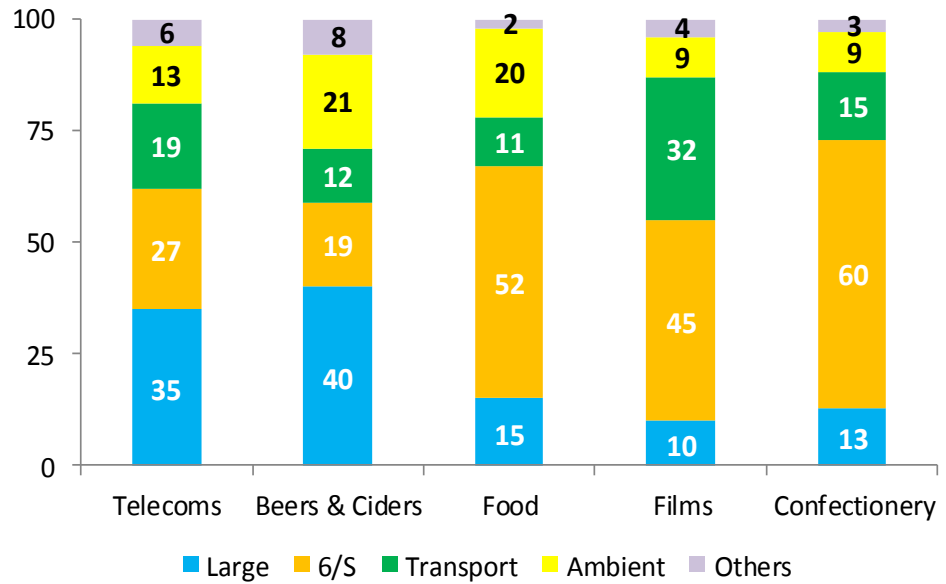


Nokia Qwerty on Adshel

The above table shows that Telecoms is very much the biggest category on out of home in 2011. Apart from the major mobile and landline providers, there were some other significant campaigns in the category in Q3. Most notable among these was Nokia Qwerty, with display value almost reaching €500k. The medium continues to work effectively for the movie category and Q3 was no exception with the likes of The Smurfs, Cowboys & Aliens and Harry Potter all featuring.

The chart below displays where the top categories are placing their money in terms of the different types of formats on out of home. For instance, 52% of the Food category display value was on 6 Sheets, reflecting a heavy point of sale bias. 32% of Films display value was on transport – an excellent way of reaching a young, city centre audience.

Top 5 Categories – Breakdown by Format



Kellogg's All Bran Golden Crunch on Purchase Point



### Top 10 Brands Q1-3 2011

1	<b>Vodafone</b>	€	3,925,983
2	<b>Meteor</b>	€	2,980,987
3	<b>Sky TV</b>	€	2,881,530
4	<b>Heineken Lager</b>	€	2,749,422
5	<b>Guinness</b>	€	2,291,033
6	<b>UPC</b>	€	2,218,662
7	<b>Carlsberg Lager</b>	€	2,211,396
8	<b>O2</b>	€	2,132,671
9	<b>7UP Free</b>	€	2,110,996
10	<b>HB Collection</b>	€	1,802,686

### Top 10 Brands Q3 2011 (Cycles 14-20)

1	<b>Vodafone</b>	€	1,600,756
2	<b>Heineken Lager</b>	€	1,450,854
3	<b>Guinness</b>	€	1,431,769
4	<b>Sky TV</b>	€	1,081,996
5	<b>UPC</b>	€	1,043,089
6	<b>Meteor</b>	€	1,008,066
7	<b>7UP Free</b>	€	916,711
8	<b>Carlsberg Lager</b>	€	886,724
9	<b>Ulster Bank</b>	€	618,316
10	<b>Cadbury Dairy</b>	€	617,400

(please note all figures above include sponsorship e.g. Vodafone Comedy, Ulster Bank GAA etc..)

In terms of individual brands, Vodafone have the highest display value, both across the entire year and Q3. Competitors Sky TV and UPC have been very active in 2011, although the products and services being advertised are quite different. Guinness and Heineken are prominent in Q3 after their Rugby World Cup campaigns.

Looking forward to Q4 and year end, we envisage a strong business period with the presidential election coming up and cycle 26 offering Christmas advertisers two full weeks of display prior to Christmas day.

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UPC on Golden Square



## Out of home Market Review

Q1 - Q3 2011 (Cycles 1 - 20, 3 Jan - 2 Oct)



### Northern Ireland

In Northern Ireland, the Q1-Q3 2011 Posterwatch display value for the out of home market was £29.6m. Comparing to the 2010 figure of £30.9m for the same period, it should be noted that Cycle 11 of 2011 was a one week period with half the display value. Allowing for this, the value of the market is similar to 2010. Please note that all display values quoted refer to media ratecard.

#### Top 10 Advertisers Q1-3 2011

1	<b>Diageo</b>	£	1,816,244
2	<b>Coca Cola</b>	£	1,360,676
3	<b>KFC</b>	£	1,006,362
4	<b>Northern Bank</b>	£	959,132
5	<b>Translink</b>	£	891,537
6	<b>McDonald's</b>	£	791,100
7	<b>Ulster Bank</b>	£	725,991
8	<b>NI Fire &amp; Rescue</b>	£	661,897
9	<b>NITB</b>	£	542,797
10	<b>Henderson Group</b>	£	531,857

#### Top 10 Advertisers Q3 2011 (Cycles 14-20)

1	<b>Diageo</b>	£	958,901
2	<b>Coca Cola</b>	£	587,768
3	<b>McDonald's</b>	£	405,470
4	<b>Translink</b>	£	399,194
5	<b>Ulster Bank</b>	£	372,818
6	<b>KFC</b>	£	336,415
7	<b>NI Fire &amp; Rescue</b>	£	257,805
8	<b>NITB</b>	£	236,845
9	<b>Henderson Group</b>	£	229,759
10	<b>C&amp;C Belfast</b>	£	196,788



Diageo's Guinness Arthur's Day on 48 Sheet

In NI, the top advertiser in Q1-3 was Diageo with a total display value of £1,816,244. The most notable ooh activity from the Diageo brand portfolio in Q3 has been for Guinness Arthur's Day. This was a multi-format campaign including 48 sheets, 96 sheets, T-Sides, and Backlits.

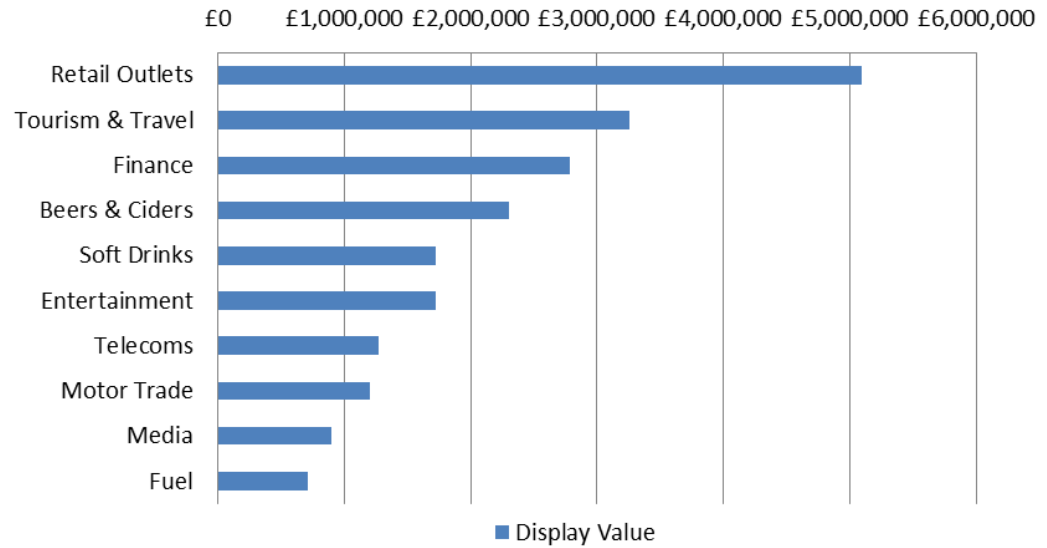
Following the success of the Arthur's Day events, a new creative appeared on the street with a 'Thanks for joining the celebrations' message.

Northern Bank have remained active throughout the 3rd Quarter with campaigns for Mortgages, Freedom Live and the launch of their new smartphone App for Android and iPhone platforms.

Henderson Group have made the Top 10 Advertisers with campaigns on 48 Sheet, 6 Sheet and Phone Kiosk for their Spar, Eurospar and Vivoxtra brands.

## NI Top Categories

The top category of advertisers, according to Posterwatch was Retail Outlets, with a total display value of £5.1m. This sector includes supermarkets, convenience retail, restaurants and shopping centres.

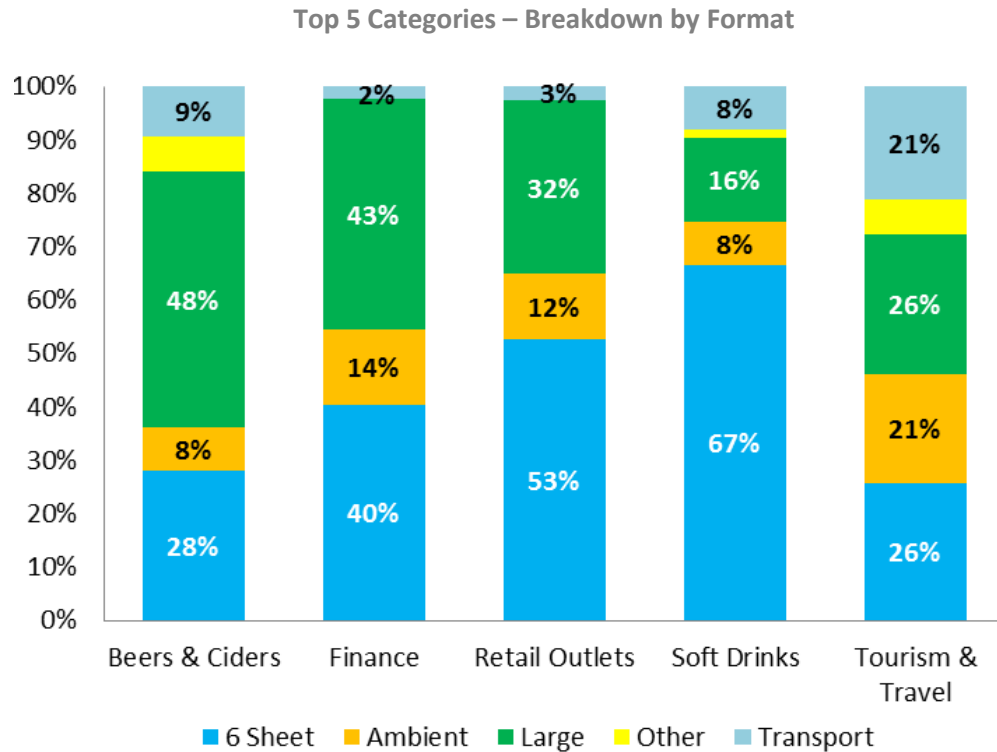


Victoria Square 48 Sheet Special Build

The Tourism & Travel sector is ranked in 2<sup>nd</sup> position with a display value of £3.3m. This category comprises of transport, tourism and airline organisations. Advertisers in the sector include Northern Ireland Tourist Board (£543k) and easyJet (£219k).

There has been a 40% increase in ooh display value within the fuel sector this year compared to the same period in 2010. Brand activity has included Firmus Energy, Phoenix Natural Gas, Airtricity and Power NI (formerly NIE), with their ooh campaigns reaching out to consumers amidst the increased competition within the sector.

The below chart shows the out of home format breakdown by the top 5 categories in terms of display value. For example, 67% of the Soft Drinks category display was on 6 Sheet, reflecting a heavy point of sale weighting. Nearly half the display value of Beers & Ciders was on large format i.e. 48 Sheets, 96 Sheets and Golden Squares.



Detailed below are the top 10 individual brands on ooh for the year to date (Q1-3) and Q3 separately. All values are based on ratecard and are from Posterwatch – a PML group service which monitors display value on all ooh panels.

**Top 10 Brands Q1-3 2011**

1	<b>KFC</b>	£	1,006,362
2	<b>Northern Bank</b>	£	959,132
3	<b>McDonald's</b>	£	780,548
4	<b>Ulster Bank</b>	£	722,631
5	<b>NI Fire &amp; Rescue</b>	£	661,897
6	<b>Coca Cola</b>	£	653,959
7	<b>Carlsberg Lager</b>	£	618,034
8	<b>NITB</b>	£	542,797
9	<b>Axa Insurance</b>	£	512,970
10	<b>Oxfam</b>	£	495,990

**Top 10 Brands Q3 2011 (Cycles 14-20)**

1	<b>McDonald's</b>	£	402,105
2	<b>Ulster Bank</b>	£	371,858
3	<b>Harp Ice Cold</b>	£	370,545
4	<b>KFC</b>	£	336,415
5	<b>Coca Cola</b>	£	261,568
6	<b>NI Fire &amp; Rescue</b>	£	257,850
7	<b>NITB</b>	£	236,845
8	<b>Spar</b>	£	229,759
9	<b>Carlsberg Lager</b>	£	213,715
10	<b>Northern Bank</b>	£	170,280

Individual brands KFC and McDonald's are well represented across the year and Q3 respectively. In Q3 Ulster Bank has had a sustained presence on ooh, moving it to No.2 position in terms of display value for the Quarter. NI Fire & Rescue Service is consistently in the top 10 with campaigns throughout the year.

Looking ahead to Q4, we expect a healthy end to the year with activity from various sectors, including retail and drinks, in the run up to Christmas. This year sees cycle 26 falling in the two weeks before Christmas giving advertisers full display value before Christmas day.