

Out of Home Market Review

Q1- Q3 2009

(Cycles 1 - 19)



PML
GROUP

POSTERWATCH



Q1-Q3 2009

Cycles 1-19

PML
GROUP

Overall Market Value

Q1 - Q3 2009

€143.9m



Q1 - Q3 2008

€144.9m

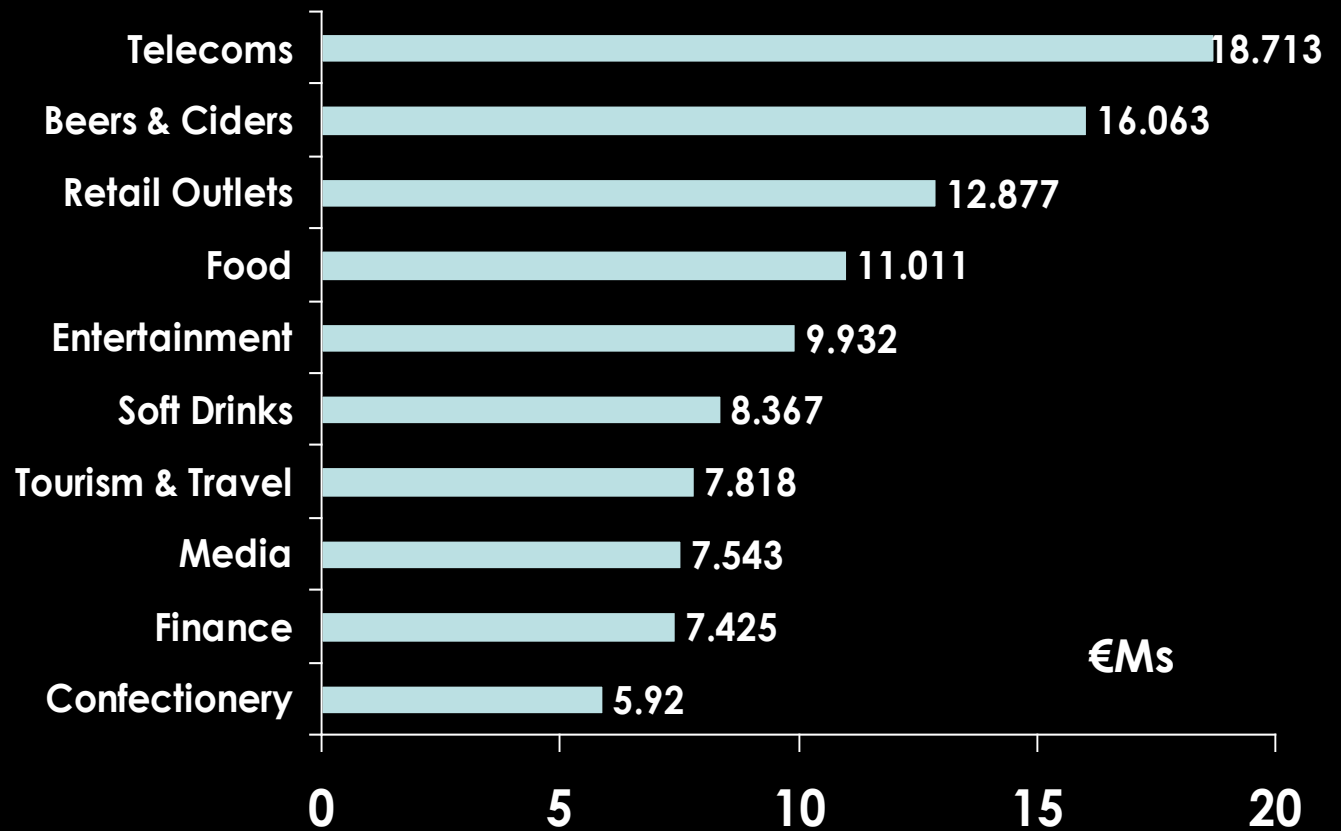
-0.7% Difference

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

ROI Top 20 Brands

1. Vodafone	€3,899,031
2. Guinness	€3,320,172
3. Tesco	€3,318,474
4. Heineken Lager	€3,316,183
5. Meteor	€2,602,540
6. Budweiser Beer	€2,530,405
7. 11811	€2,344,421
8. O2	€1,963,181
9. 3 Mobile	€1,947,508
10. Coca Cola	€1,915,756
11. Hibernian Aviva	€1,760,539
12. UPC	€1,708,342
13. SuperValu	€1,612,997
14. McDonald's	€1,496,319
15. 7UP Free	€1,454,871
16. Coors Light	€1,452,198
17. Carlsberg	€1,391,288
18. Gum Litter Task Force	€1,386,250
19. National Lottery	€1,306,774
20. Bank of Ireland	€1,295,825

ROI Top 10 Categories





Q1-Q3 2009
Cycles 1-19



ROI Top 10 Advertisers Q1 - Q3 2009

Rank	Advertiser	Brands Advertised	Display Value
1	Diageo	Guinness, Budweiser, Carlsberg, Smirnoff, Smithwick's	€8,535,004
2	Heineken Ireland	Heineken, Coors Light, Murphy's	€5,661,292
3	Eircom	11811, Internet & Phone Bundles	€4,774,926
4	Coca Cola	Burn, Coca Cola, Diet Coke, Sprite, River Rick, Nestea	€4,132,686
5	Unilever	Ben & Jerry, Comfort, Dove, HB Ice Cream, Persil, Vaseline, Lynx, Lyon's Tea, Sure	€4,009,341
6	Vodafone	Various Vodafone products and services	€3,899,031
7	Kellogg's	Various Kellogg's cereals and bars	€3,753,279
8	Tesco	Tesco Retail, Tesco Mobile	€3,318,474
9	GSK	Lucozde - Apple, Energy, Sport, Panadol, Ribena	€2,752,941
10	Meteor	Various Meteor products and services	€2,602,450



Top 10 on Large Format

1. Tesco	€1,806,766
2. Guinness	€1,722,606
3. Vodafone	€1,656,552
4. Heineken Lager	€1,579,785
5. Hibernian Aviva	€1,464,375
6. UPC	€1,105,533
7. Meteor	€1,083,730
8. 3 Mobile	€ 934,627
9. Budweiser	€ 928,993
10. O2	€ 810,885

Top 10 on 6 Sheets

1. Eircom	€1,483,442
2. 11811	€1,428,056
3. McDonald's	€1,182,165
4. Tesco	€1,020,689
5. Coca Cola	€ 954,878
6. Vodafone	€ 833,912
7. Heineken Lager	€ 804,309
8. Bank of Ireland	€ 771,477
9. 7UP Free	€ 679,613
10. Gum Litter Task Force	€ 676,488

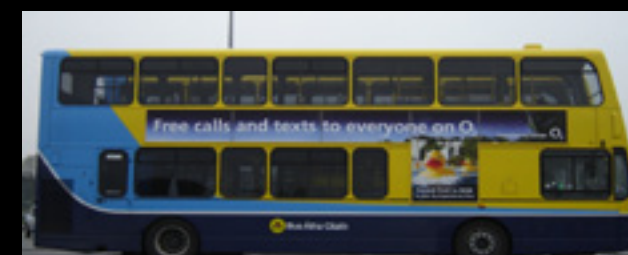
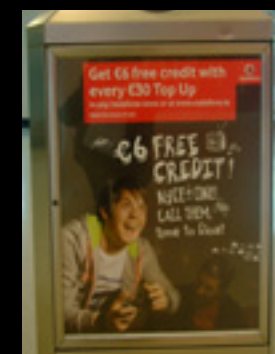


Top 10 on Transit

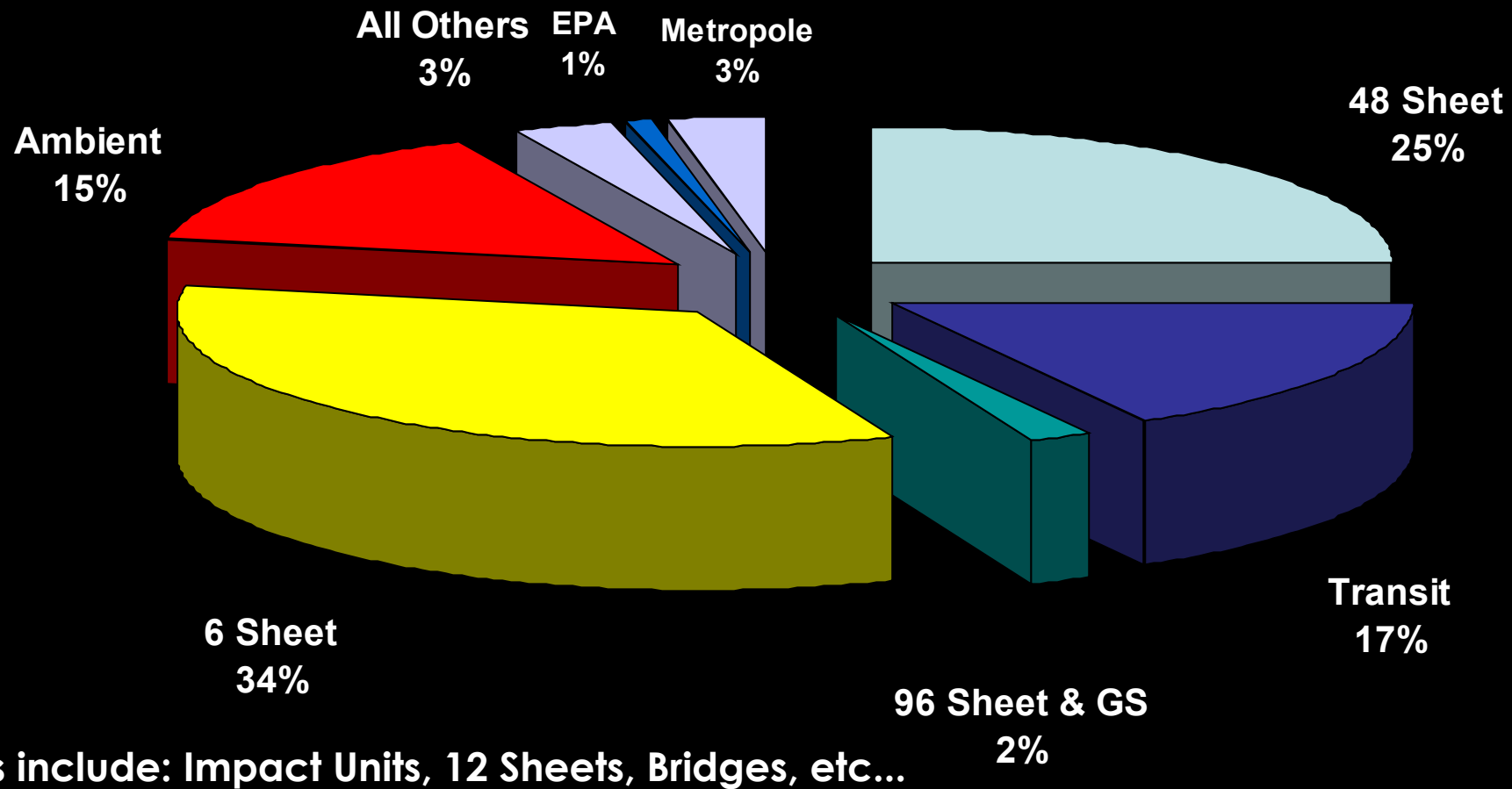
1. Meteor	€923,244
2. 11811	€696,191
3. O2	€536,404
4. Vodafone	€480,210
5. 4FM	€468,150
6. Guinness	€450,241
7. Burgerking	€433,952
8. Gum Litter Task Force	€420,537
9. Tesco	€407,150
10. Bank of Ireland	€359,371

Top 10 on Ambient

1. Budweiser	€853,524
2. Vodafone	€773,590
3. Coca Cola	€550,558
4. Eircom	€509,329
5. Guinness	€432,241
6. O2	€376,253
7. Coors Light	€320,020
8. Nestlé Cereals	€254,610
9. KFC	€235,776
10. 7UP Free	€224,756

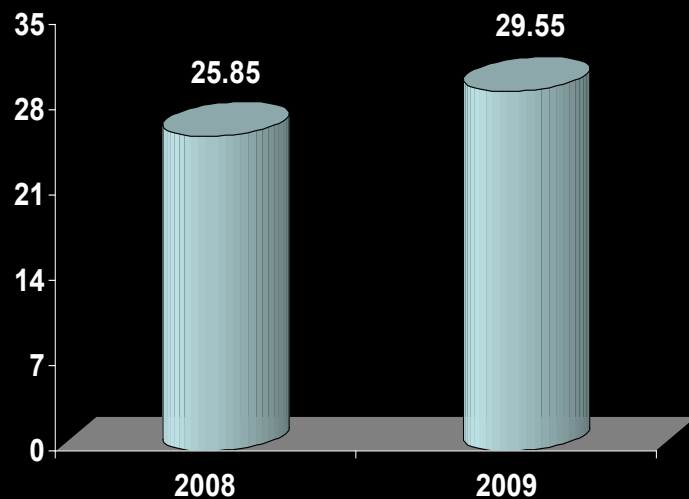


Republic of Ireland - Breakdown by Format



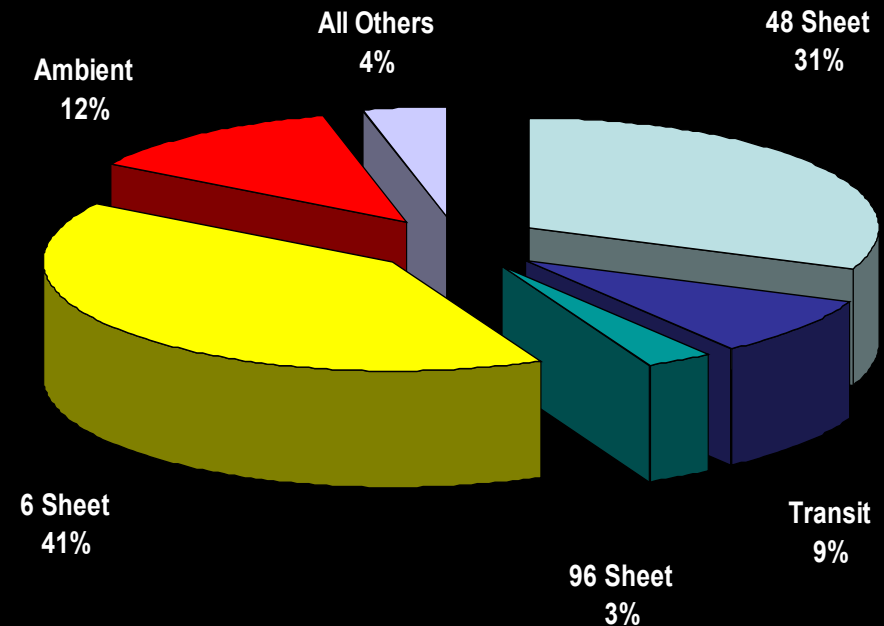
Northern Ireland Market

Overall Market Value
 Q1 -Q3 2009
 Stg £Ms



2009 includes Ambient Media

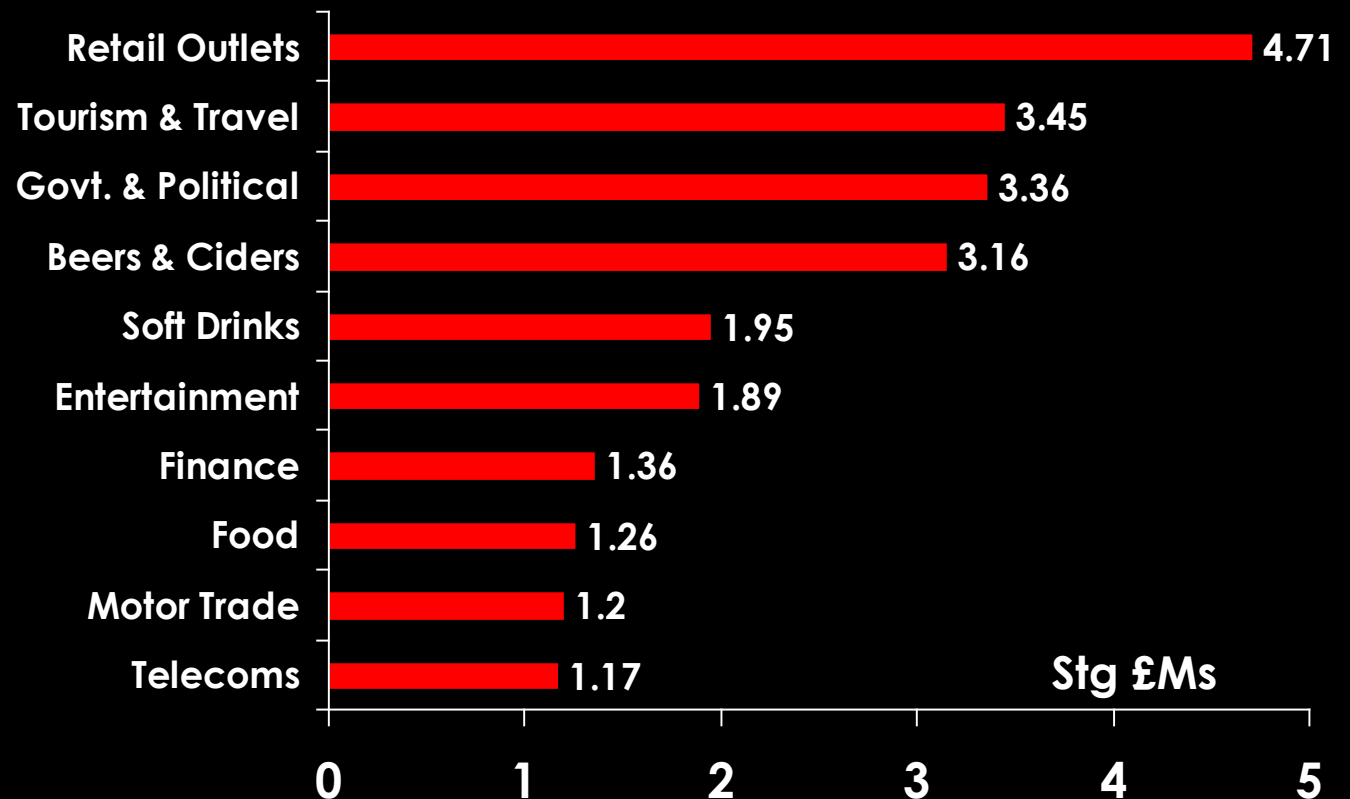
NI Format Breakdown
 Q1 - Q3 2009



NI Top 20 Brands

1. KFC	£1,334,680
2. McDonald's	£ 758,190
3. NI Fire & Rescue	£ 739,600
4. Guinness	£ 732,542
5. Harp Lager	£ 672,778
6. Coca Cola	£ 451,840
7. Diet Coke	£ 401,800
8. Lucozade Energy	£ 401,115
9. Ulster Bank	£ 374,429
10. Magner's Pear	£ 352,760
11. Vodafone	£ 350,616
12. NI Tourist Board	£ 348,270
13. Magner's Original	£ 344,470
14. BT	£ 341,195
15. Coors Light	£ 322,008
16. Aer Lingus	£ 320,775
17. Northern Bank	£ 309,990
18. Brennan's Bread	£ 278,650
19. Simon Community	£ 274,605
20. Odyssey Arena	£ 269,485

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 on: 01 668 2900 or colum@pml.ie

