The latest issue of our consumer insights update featuring extracts from PML Group’s research resources plus items of interest from home and abroad. Featured in this issue:
Trust in Out of Home

As part of our ongoing iQ research programme we asked our panel of Dublin respondents about their trust in products/services advertised via OOH.

Thinking specifically about Outdoor advertising, to what extent do you agree or disagree with the following statement? “I trust brands/products that I see advertised on OOH.”

69% of all Dublin adults agree they trust brands/products they see advertised on OOH.

35-44 and 45-54 year olds are most likely to trust in brand/products they see advertised on OOH.

Females are more likely than males to trust brands/products advertised on OOH.

OOH – Key Online/Offline Driver

As part of our ongoing iQ research programme we asked our panel of Dublin respondents about their responses to OOH advertisement they’ve seen.

Have you done any of the following things as a direct result of seeing an Outdoor advertising poster in the past 6 months?

37% have made an online purchase based on advertisement they have seen on OOH. This rose to 64% for AB males.

59% have searched online for more information about the company or the product. Males 25-34 were most likely to search online at 72%.

59% have visited a retail outlet/store as a result of seeing OOH advertisement. This rose to 82% when looking at C2 Males.

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Time for a Dynamic Approach

We recently asked our panel of Dublin respondents about the types of information they would like OOH advertising to deliver.

Digital screens incorporating advertising are now located in many areas including Dart stations, airports, supermarkets, shopping malls and store windows. What information would you find useful to be displayed?

Males consider time of day and weather forecast as the most useful information for them to receive (54% v 54%).

Females are more likely than males to want weather forecast displayed.

Highest agreement is females 25-34 years old (time of day at 87%).

Time of day is deemed the most useful in dynamic DOOH advertising @ 65%.

Weather forecast and news updates are considered the 2nd and 3rd most useful information to be displayed.
Noticeability of Advertising

As part of our ongoing iQ research programme, we asked our Dublin panelists what type of ads they tend to notice most.

Thinking of the various media on which you see or hear advertising, what type of ads do you tend to notice most?

**OOH** is viewed as the most noticeable advertising channel.

Following on from OOH, TV and Online advertising are considered the 2nd most noticeable media channel (21% v 21%).

- 41% of DE females notice OOH the most.
- 31% of 45-54 year olds notice OOH the most.

1/4 of all Dubliners tend to notice OOH first.
Summer in Dublin

As part of our ongoing iQ research programme, we surveyed 300 Dubliners to find out what they were most looking forward to about summer 2018.

Here's what they had to say.....

Nice weather and people feeling happier in general. M: 25 - 29, F: 25 - 29

Larger evenings, bright days and plenty of outdoors time! M: 35 - 39, F: 35 - 39

Good weather, long evenings, more options. M: 45 - 49

Music Festivals M: 30 - 44

The most energetic season of the year, full of colours and vibrancy. Blue skies, warm weather M: 20 - 24

TOP 10 WORDS USED:

1. Weather
2. Holidays
3. Sun
4. Time
5. Good
6. Evenings
7. Days
8. Sunshine
9. Family
10. Nice

68% were either very or quite interested in messages relevant to seasonal events.

67% are either very or quite interested in messages relevant to weather e.g. An ice cream advert on a hot day

Ireland experiences up to 17 hours daylight in the height of summer

https://www.freeanddirty.com
In Q1, PML Group researched almost 300 OOH campaigns, below are some of the top recalled campaigns in that period.

1. **McDonald’s Eurosaver**
   - Format: Bus Shelter
   - Media: Mediaworks
   - Creative: TBWA\Dublin
   - OOH Agency: Source out of home

2. **Dunnes Stores**
   - Format: Bus Shelter
   - Media: Carat
   - Creative: In-House
   - OOH Agency: Source out of home

3. **AIB Mortgages**
   - Format: Bus Shelter
   - Media: Starcom
   - Creative: Rothco
   - OOH Agency: Source out of home

4. **permanent tsb - Mortgages**
   - Format: 48 Sheet
   - Media: PHD
   - Creative: Publicis
   - OOH Agency: PML

5. **Ryanair**
   - Format: Superside
   - Media: MediaCom
   - Creative: In-House
   - OOH Agency: Source out of home
OCS (Out of Home Consumer Survey) is a media and lifestyle study exclusive to PML Group which shows how people in Ireland travel, behave and respond to advertising in the OOH environment. For the analysis below we profiled consumers that share and upload content that they’ve found or created 4-7 days a week. Results are indexed against all adults (in brackets).

**PLACES ADVERTISING IS NOTICED**

- 56% Cinemas
- 52% Shopping Malls
- 45% Bus/Tram Stops
- 44% Billboards
- 40% The Supermarket
- 38% Petrol Service Station
- 36% Passing by a bus/tram
- 34% The High Street

**POSTER/SCREENS INFLUENCING SPONTANEOUS PURCHASES**

- 27% Movie/Theatre tickets (240)
- 25% Toiletries/Cosmetics (231)
- 19% Soft drinks (227)
- 18% Sweets and snacks (202)
- 17% Fast food (193)
- 17% Athletic Wear (231)
- 17% Newspapers/Magazines (277)
- 16% Personal electronics (195)
- 15% DIY/Homeware/Furniture (184)

**INTEREST IN DIGITAL SCREEN INFO/ADS - VERY INTERESTED**

- 39% News (106)
- 35% Offers (107)
- 33% Day (173)
- 32% Time (142)
- 30% Weather (147)
- 27% Seasonal (146)
- 27% Countdown (155)
- 25% Sports (123)

**TRUST**

- 70% say they are more likely to respond/click on an advert on their smartphone for a brand they trust if they have recently seen a poster for the same brand (146)

**ADVERTISING RESPONSES IN PAST 7 DAYS**

- 33% talked to friends/family/colleagues about the brand advertised (195)
- 29% searched online/Googled for further information (115)
- 28% searched online for a film trailer/cinema times (162)
- 28% Made a purchase online (177)
- 27% Made a purchase in a shop, supermarket, restaurant, cinema etc. (115)
- 26% Taken a picture (152)
- 13% Checked/searched a hashtag or search term on a poster/digital screen (302)
- 7% Tweeted/posted on a blog/social networking site about the brand advertised (176)

**Digital Screens**

- 59% Advertising on digital screens creates the impression of a quality brand (125)
- 57% Poster/screens often create a reason to search online (124)
- 55% Advertising on digital screens suggest that the brand is a market leader (133)
- 46% Like ads that use live social media feeds in their digital screen advertising (170)
- 37% Like using their mobile phone to interact with an advertisement on a billboard (218)
- 36% Have interacted with a touch screen digital poster (190)

To find out more about OCS contact:
James Byrne // Marketing Manager // 01 668 2900 // James@pmlgroup.ie
Dublin’s Footfall Analysis

BNP Paribas Real Estate recently published a fully comprehensive Pan-European footfall analysis. The below information outlines Dublin’s footfall along three main city centre areas.

Redevelopment projects to attract new retailers

In an economy operating at almost full capacity, Dublin’s prime retail streets continue to benefit from recovery in Irish spending power. The combination of stronger than expected economic growth plus employment growth in high value added sectors is encouraging the redevelopment of the office and retail landscape of the city. A result of this is that investor and occupier interest in street retailing is expected to remain solid.

From Mass Market to Up Market
Mixed (Mass Market to Luxury)

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Grafton, Henry, and Mary Streets

The 515 metre-long-pedestrianised Grafton Street is Irish retailers’ most sought-after location. Starting its route from Ireland’s oldest University, it adds a tourist dimension to a large retail offer. The street is anchored by Brown Thomas exclusive department store, a place where most upmarket brands have concessions since unlike many other capital cities, Dublin has no defined “luxury” retail pitch. Reconfiguration of smaller units over recent years allowed for international and domestic retailers seeking space to come into Dublin. The impact of this strategy was positive with additions like & Other Stories, Hugo Boss, Urban Decay, Space NK, Molton Brown and Victoria’s Secret. In the surroundings, Meyer Bergman and Hines are redeveloping large premises into iconic retail sites. Henry/Mary Streets show a strong footfall over the combined 575 metres thoroughfare. Units here are fully occupied, with a considerable number of UK high street operators as well as domestic and international ones. Marks & Spencer, Debenhams and Dunnes specialty stores are key landmarks on the scene, as is the Ilac Centre which has recently seen substantial refurbishment. Combined with a wide range of clothing and footwear retailers (Topshop, Ms Selfridge, Next, Zara, River Island, H&M) the offering makes the axis a very popular shopping destination. Henry Street is well known as the home of the Arnott’s department store, which was purchased by the Selfridge Group in 2015, with plans in the pipeline to modernise and extend the front of the store. Mary Street, which follows directly on from Henry, was considered somewhat secondary until Jervis Shopping Centre opened in 1996. It is home to Ireland’s busiest flagship store Penney’s (Primark) which also serves as the headquarters of the global retailer. Footfall in downtown is likely to increase as the LUAS (light rail system in Dublin) extensions are almost complete; given the proximity of Grafton and Henry/Mary streets to stops, these locations will undoubtedly gain.
More than half of commuters now use public transport in Dublin

The number of people travelling into Dublin’s City Centre using bus, train or Luas every morning has reached record levels, according to figures published today by Dublin City Council and the National Transport Authority.

The figures are included in the Canal Cordon Report, 2017 on mode share of people coming into the City Centre. The field work for the report was conducted over a number of days in November of last year.

107,160 people came into the city centre using bus, train or tram, the largest number recorded since the Cordon count began in 1980. This now means that over half of all journeys into the city in the morning are made on public transport.

Good news too for cycling and walking. 12,447 people cycled into the city centre – the highest number ever – with walkers accounting for 25,000 people crossing the canal cordon. Mode share for cycling is at 5.9%, with walking at 11.8%.

70% of all inbound trips crossing the canal cordon were made by a sustainable mode which includes cycling, walking, taxi and other public transport. The sustainable mode share has grown year-on-year since 2010. In the last 11 years the share for sustainable modes has grown by 9 percentage points.

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Figure 2 – Numbers of people crossing the Canal Cordon by mode of travel 2006-2017
A report published by Transport Infrastructure Ireland shows how economic growth is affecting travel times for busy commuters.

**ROADS USAGE OVER THE DAY**

Profile of the usage of the National Roads Network by time of day

The peak periods on our National Roads are extending outwards due to increased demand and congestion. In the morning, the peak period lasts between 6.30am and 9.30am whilst in the evening, the peak covers the period between 3:30pm and 6:30pm. Peak traffic hours have a level of traffic some 30% to 50% above off-peak levels. The M50 is the most used road in the country with daily weekday traffic of up to 145,000 along its busiest sections. The peaks on the M50 are more prolonged than other roads with significant traffic flows being maintained during off-peak periods. The trend of 'peak hour spreading' continued in 2017, with the peak period share of total daily M50 traffic reducing by 0.5% in the PM Peak period compared to the previous year.

Source: TII National Transport Model, 2017
TRIP DURATION
NATIONAL ROADS AND REGIONAL ROADS - AM PEAK

Profile of the trips made on the National and Regional Roads network by their duration

Across the road network, a significant portion of trips that people make are of short duration. In total, 39% of trips are of 15 minutes duration or less.

TRIP DISTANCE
NATIONAL AND REGIONAL ROADS - AM PEAK

Profile of the trips made on the National and Regional Roads network by their distance

Across the road network, a significant portion of trips that people make are short distance. In total, just over 50% of trips on the National and Regional road network are 15 kilometres or less.
Traffic growth was 3.0% across the network in 2017.

The highest regional growth recorded in 2017 was in the Mid-West and Border with 3.9% for the year. The Midlands and Mid-East also experienced significant growth at 3.5%. The South West and West had the lowest year on year growth at 1.1% and 2.1% respectively.

For HGVs Dublin and South-East recorded the highest regional growth at 4.6%. The West and South-West had the lowest year on year growth at 0.9% and 2.9% respectively.

The greatest year on year traffic growth by road type was recorded on motorways; where traffic has increased 4.0% for all vehicles and 4.8% for HGVs.
Irish shoppers make up to eight visits to a supermarket every month, spending an average of 34 minutes each time, according to new research from V360°, the shopper agency. This works out at just over two days a year inside a supermarket!

While we may go to the supermarket to shop for particular items, this research shows we are very open to distraction while there, with 92% saying we have come home without the item we specifically went to pick up!

92% also admit to buying something different than they intended after they were exposed to in-store advertising. This isn’t just a once off, as nearly half of us claim to do this on a fairly regular basis. We’re also open to persuasion when shopping, with 79% saying they have bought food or drink items after receiving a free sample.

Irish shoppers are also quite thrifty! Nearly 8 out of 10 (78%) say that if they forget their reusable shopping bag, they have refused to purchase a plastic bag and instead tried to carry home all of their items by hand!

While many of us will go to the shops to shop, 71% say they have gone to a supermarket just to get out of the house for a while. This is especially common in those aged under 35, with 80% of them saying they have done this. Just over one third of us (36%) have also used a trip to the supermarket as an opportunity to catch up with friends and find out what is going on in the local community.

Some of our less than admirable habits as shoppers were also highlighted in the research by V360°:

• One quarter (24%) admit to ordering food at the deli, changing their minds and leaving the item on a shelf without purchasing

• 15% of shoppers or their children have eaten something in store and not paid for this item when checking-out

• 41% of shoppers who are parents admit that they have left their child in a shopping aisle to have a tantrum while they continued their shop
Eoghan Phelan, Joint Managing Director of V360°, says:

“Our recent research gives a real insight into some of the typical behaviours that people engage in when shopping. A better understanding of shopper needs and behaviour can lead to providing better retail and product solutions. This, in turn, will help ease the burden for shoppers while helping retailers and suppliers succeed and thrive in today’s extremely competitive market.”

V360° is a new multi-disciplinary shopper agency which delivers a full shopper solution from insight and strategy right through to final execution. The agency, operated by industry experts The Visualise Group, combines three-way insight into consumers, shoppers and retailers to create shopper solutions that solve business challenges and ultimately creates positive enduring change in shopper behaviour.
OOH & Mobile Made for each other

Many studies show that OOH is excellent at driving Mobile and Online activations.

Source: Mobility Report 2015, Ericsson

Future Consumer in 5 years: 90% of mobile traffic

FUTURE
CONSUMER
IN
5 YRS: 90%
OF
MOBILE
TRAFFIC

75%
of under 30's own a smartphone

75%
OF UNDER 30'S
OWN A
SMARTPHONE

24%
SPEND PER DAY: 3 HRS
ON THEIR PHONES

18-29 yrs
90%
#active social media users

Source: Outperform, Ipsos and Route, UK 2013

OOH and MOBILE
MADE FOR EACH OTHER

OOH drives to mobile

Source: Outperform, Ipsos and Route, (UK 2015, J5 campaigns, 16-44 year olds)

+55% →
MADE FOR RETAIL

Source: Smarter - Drive to Web, JCDecaux France
For further details on any piece of research featured in Explore please contact:
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