



Opportunity in Out of Home



Première

JCDecaux



Now, Near, Next is a collection of thought leadership pieces, research studies and insights from PML Group in response to Covid-19 which aims to help ensure brands can communicate and engage with their customers most effectively now, in the near future and in the more distant future.



What's happening – Now, Near, Next

75% of
counties back
to baseline
driving levels



Dublinbikes
journeys up
77% in May

Traffic level
up 100%
since April



Drive-In
trend
gathers
momentum

79% of rail
users intend
to get back
to pre-Covid
routine



Younger
people
keenest to
return to
workplace

Influencing the
shopping list more
important than ever



Daily
average
footfall of
162,000 in
town last
week

Streets Alive

A real sense of optimism is in the air – both in society as a whole and from our viewpoint in the world of Out of Home media. Our medium is traded primarily in two-week cycles and the current cycle – cycle 13 – is the best performing for the medium since mid-March.

Advertisers including Mondelez, Charleville, Danone, Diageo, Lidl, Kellogg's and Sky are active across numerous formats and environments. This has followed a steady trend of more and more active advertisers gravitating back to OOH.

Advertisers seek audience and the recovery of the OOH audience has been sharp and is gaining momentum week by week, as we have chronicled in this Now Near Next series.





Mobility

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Mobility

Evidence of increased mobility on various modes of transport continues to emerge this week.

At PML Group, we are using multiple sources of mobility data to track behavioural changes in audience movement as the population adapts to their circumstances. These include Locomizer, Apple, Google and Transport Infrastructure Ireland.





Data from JCDecaux and Just Eat dublinbikes this week shows that for the entire month of May, the number of journeys taken via the bike sharing scheme had increased by 77%, compared to April. The same figure for the first half of May had been 64%, indicating a percentage increase considerably higher than 77% in the second half of the month.

These figures are indicative of the returning city centre audience and what makes them even more encouraging is the fact that they are derived from the period before the easing of lockdown restrictions with regard to city centre retail came into effect.





Bonneagar Iompair Éireann
Transport Infrastructure Ireland

The National Road Car Traffic Report released by the TII on Wednesday shows that traffic volumes have doubled over eight weeks from the 22nd April with an overall weekly increase of +5%.

The survey provides traffic trend information derived from a small sample set of traffic counters located on the national road network including major motorways and national roads. The information covers the morning period from 7am until 10am. The trend for car traffic from this period of the day generally correlates closely with the overall daily trend in car traffic at each location.



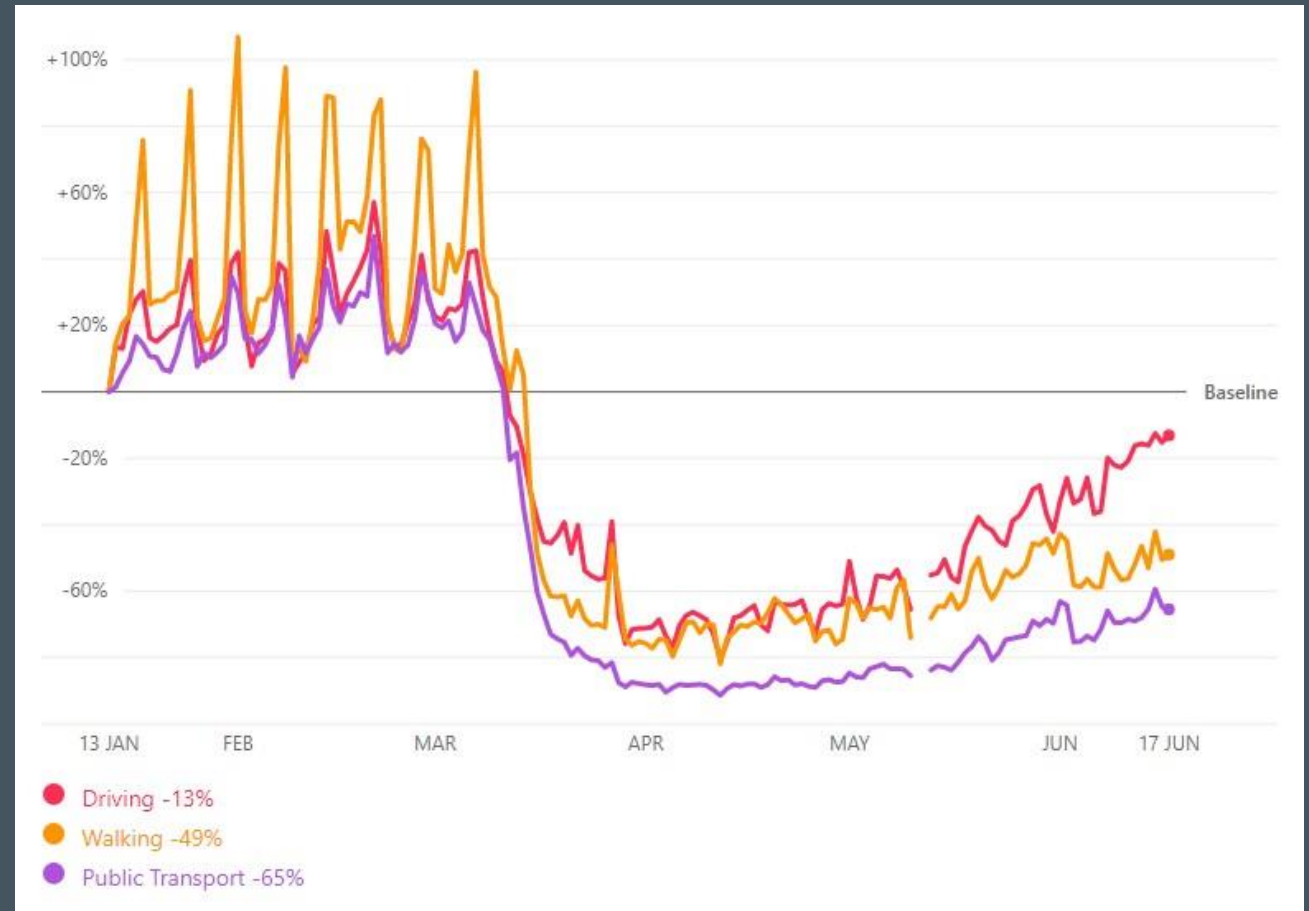


NOW
NEAR
NEXT

75% of counties in Ireland back at baseline levels

Apple's routing requests reveal daily trends in mobility. The latest data to Wednesday 17th June shows **driving in Ireland stands at 87% of start point** in Jan and **up 12% in past week**.

Monday's release showed the highest count of transit in Dublin with a seven day **increase of 23%**. Driving routing requests are now above the baseline figure in **15 of the 20 counties** measured, including Cork at +7%. Driving in Northern Ireland is also now at parity with baseline.

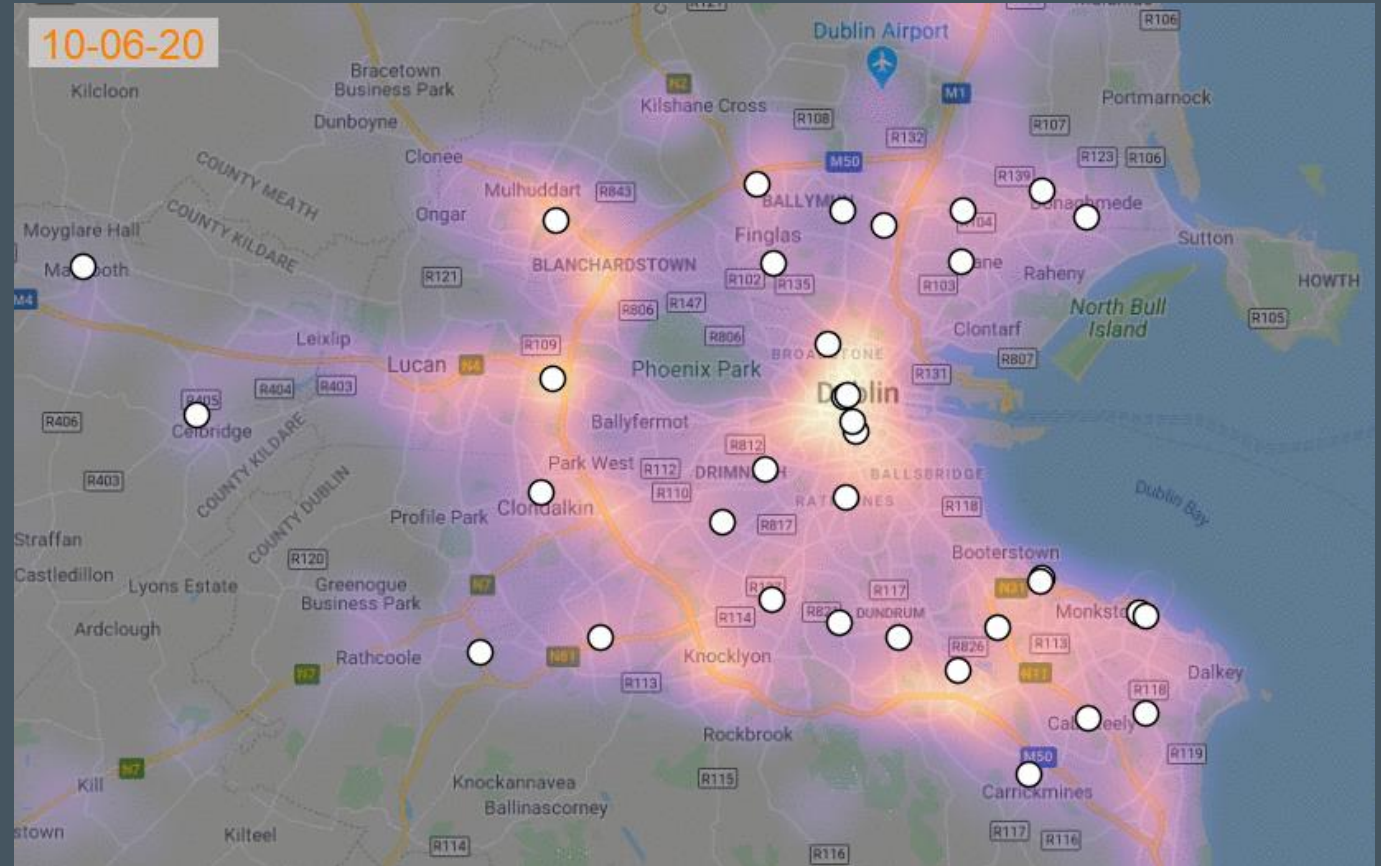


locomizer

Locomizer and Shopping Centres

This week we've fused Locomizer auto volumes with the 119 shopping centres contained in our Pinpoint mapping database of POIs. The timeframe covers six days in the lead up to and including Monday 15th June when shopping centres opened to the public as part of the government's roadmap. Hotspots are visualised based on a combination of time and users giving a complete picture of mobility.

The heatmap here shows activity in and around key retail destinations including Dundrum, Blanchardstown and Liffey Valley while also reporting strong city centre auto mobility which encompasses both cars and buses. These outputs can be further overlaid with OOH panels to give brands the opportunity to engage the expanding OOH audience on path to purchase.





Leisure

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Drive-In matches help fire football's flames

A 12 metre x 5 metre LED screen will allow up to 800 people to watch the Everton v Liverpool derby match from a maximum of 200 cars at the RDS. Sport, whether witnessing live at stadia or via TV, is for so many a shared experience that they long to be part of again and initiatives like this are a welcome opportunity for fans to be part of a collective again, in a safe environment.

The Ballsbridge venue is extensively served with high quality digital and classic roadside OOH formats and events such as these will drive traffic in these areas at traditionally less busy weekend and night times.





Pubs and cinemas set for earlier reopening

With restaurants already allowed to open from June 29th, there was more good news this week for the hospitality and leisure sectors with pubs and cinemas looking set to reopen in the near future.

Research from Amarach this week indicates that 34% of respondents claim they will be among the first back to their favourite restaurant or pub when they reopen. Our own research conducted by IpsosMRBI in April highlighted eating out, cinema and pubs among the activities people were most looking forward to doing again as lockdown restrictions eased.





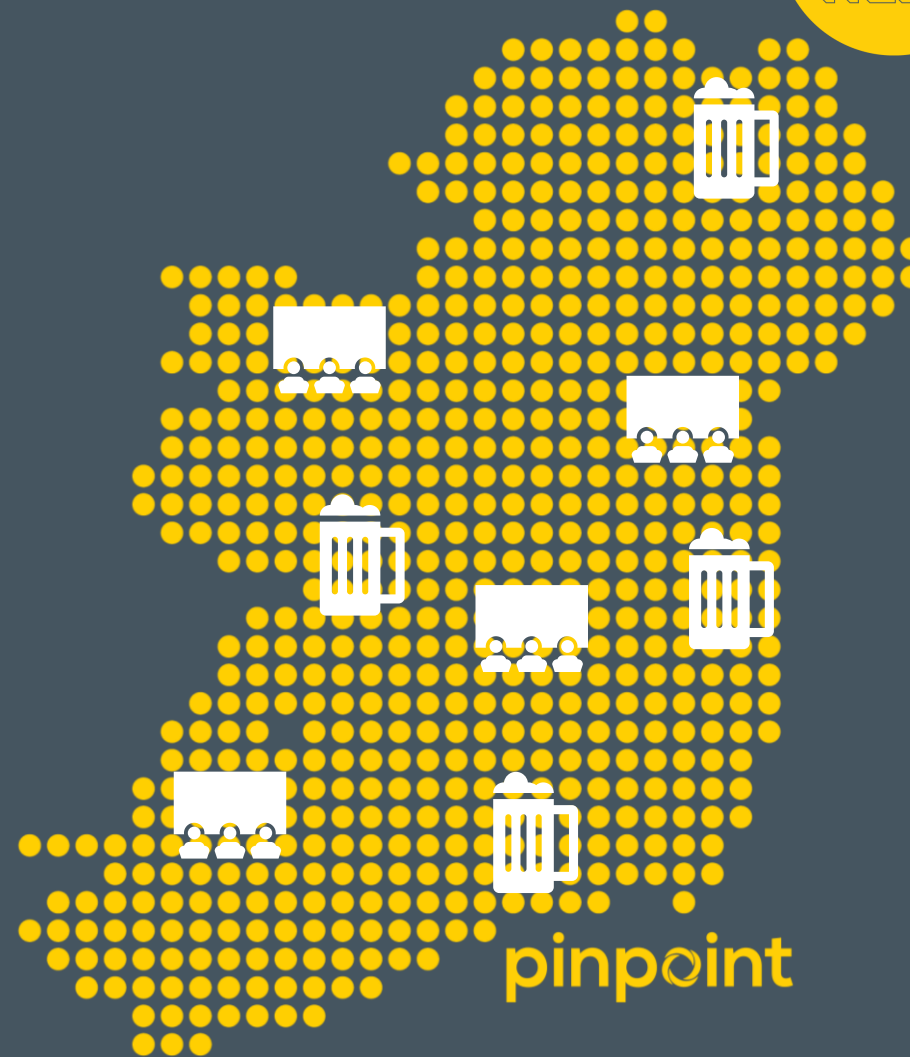
NOW
NEAR
NEXT

Pubs and cinemas set for earlier reopening

For movie fans, it appears that they may be able to get their fix sooner than expected with Extra.ie reporting earlier in the week that cinemas may be moved to an earlier phase of the government roadmap than previously anticipated. Cineworld in the UK this week confirmed all its cinemas would be open by July 10th and some sooner.

The CineD network of 42 screens across 22 locations nationally is an ideal platform to engage film fans. Likewise, digital screens in shopping malls can also target cinema goers at these locations.

Just as retail reopenings attracted large queues and well times, we would also expect a high demand among consumers to reconnect with friends and family through these channels.



All pubs and cinemas mapped on our Pinpoint platform



Pubs and cinemas set for earlier reopening

Further research from the US and released locally this week by Wide Eye Media also highlights consumers desire to return to the big screen.

Highlights of NCM USA Wave 3 Survey May 21st-27th



Cinema Going:

95% enjoy going, 93% miss going, and 82% prefer it to watching a new movie at home

Once restrictions are lifted, 'Going to the Movies' is ranked as the #1 activity respondents are looking forward to doing!

Future moviegoing plans include:

- o Going more frequently or as frequently as they did before cinema closed
- o Arriving earlier to the cinema as compared to before COVID-19
- o Attending the movies more often during the week (Mon-Thurs) and during earlier showtimes (mornings) compared to before COVID-19
- o Accepting new measures for reopening cinema

53,000 Golf Bookings in One Minute!

The appetite of Irish people to return to sport and outdoor pursuits was highlighted this week with figures showing record levels of golf club bookings in Ireland and UK since courses reopened on a restricted basis on May 18th.

BRS, the online golf booking system, have seen record breaking numbers in recent weeks in terms of users, sessions and bookings on their platform. Users on their website and app increased by 83% year on year and bookings reached a peak of 53,300 in one minute during the week of June 1st as golfers rushed to secure a coveted slot.





Kellogg's Cúl Camps get go ahead for summer

Good news for parents and children alike this week with the GAA announcing that the 2020 Kellogg's Cúl Camps will begin on 20 July. It comes in conjunction with the Safe Return to Gaelic Games Document and the easing of restrictions brought into place due to the coronavirus pandemic.

Club venues which will be able to cater for children who take part in the camps will be confirmed on Monday, 22 June. Camp schedules may be reduced in certain counties while capacity at certain locations and venues may be reduced due to health and safety protocols that will be put in place.





Retail

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DUBLIN TOWN™

Crowds flock back to Dublin city centre

Audiences rushed to shopping centres this week as retail outlets around the country reopened for the first time since their closure nearly three months ago. Two months ahead of schedule, Dundrum Town Centre and other large retail hubs fully reopened this week.

The city centre got off to a promising start last week with huge numbers visiting the city to peruse their favourite shops after a lengthy period without the physical retail experience. DublinTown reported an average daily footfall of **162,000** in the city centre last week.



Bank of Ireland

Surge in holiday spending seen in BOI analysis

New analysis on Bank of Ireland debit card transactions shows that spend on other areas of retail is up by 56%. Tracking spend across a week period (8th -14th June), Bank of Ireland compared it with the average spend during the lockdown from March 28 to June 7 to identify trends in consumer spending patterns.

Holidays are top of mind for consumers with debit card spend on booking accommodation up 101%. With restaurants and coffee shops catering to takeaway and delivery services, consumer spend was up 63%. As increasing numbers travelled to urban centres in the first week of retailers reopening, transport spend rose by 115%.

Debit card spend 8th June 14th June

(compared to average spend 28th March - 7th June inclusive)

↑ UP

139%

✈ Air Travel

115%

👤 Passenger Transport

101%

🏠 Accomodation

63%

🍽 Restaurants & Takeaways

56%

🛒 Retail

↓ DOWN

21%

🎮 Gaming

13%

🎬 Video streaming services

11%

🎵 Entertainment

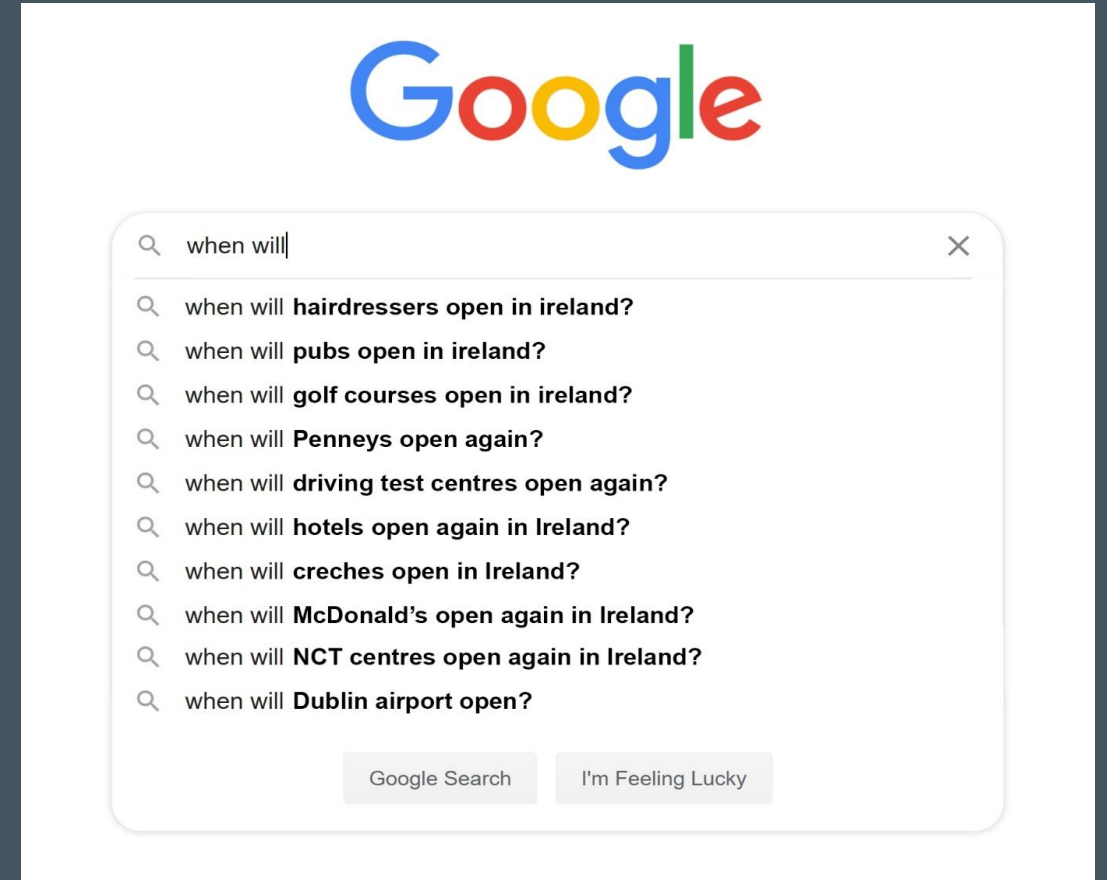
2%

🛒 Groceries

Google

Cutting Loose

It is understood that cabinet will today announce that the reopening of hairdressers and barbers will be brought forward to June 29th from July 20th. This will coincide with the reopening of restaurants and bars serving food. You may recall hairdressers featured prominently when we reported back in May on top Google searches in days following Covid-19 roadmap release.





Sentiment /Insight

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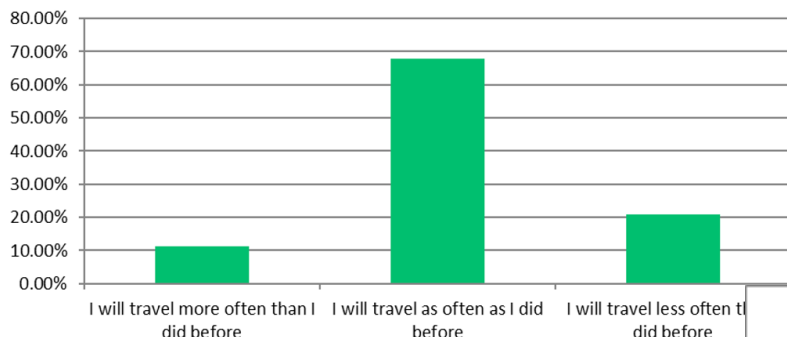
79% of Rail Users intend to maintain or increase pre-Covid travel levels

Research undertaken by Iarnród Éireann in recent days among more than 5,000 of its customers reveals that a great majority intend to get back to pre-Covid frequency of train travel. And in the case of just over 10% respondents, they intend to actually travel more by train than they did previously.

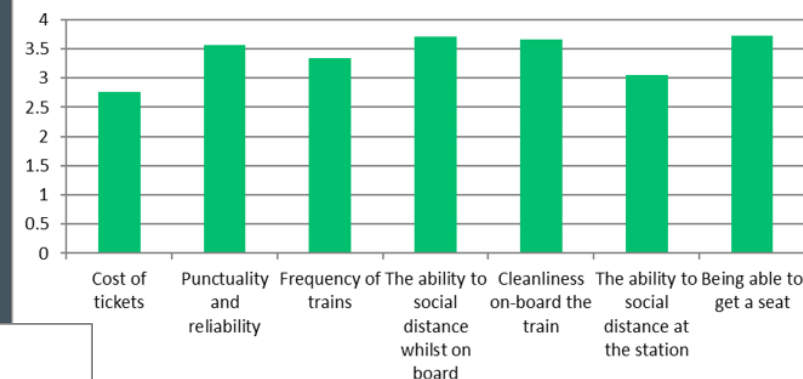
Cleanliness and the ability to social distance on the train are now more important to users than perennial travel concerns such as punctuality and reliability. However, more than 25% of respondents intend to travel by train within a week of government restrictions being lifted, with a further 31% intending to return to the train within a month.



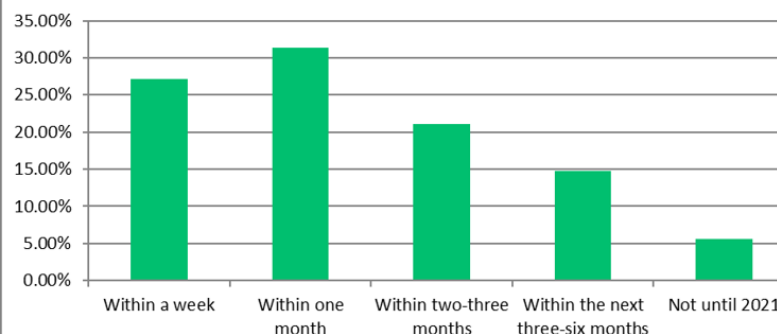
When Government restrictions are reduced/lifted, what are your plans for train travel? (select only one)



What will be the important things when travelling again by train?



When the Government restrictions are reduced/lifted how soon will you travel by train again? (select only one)

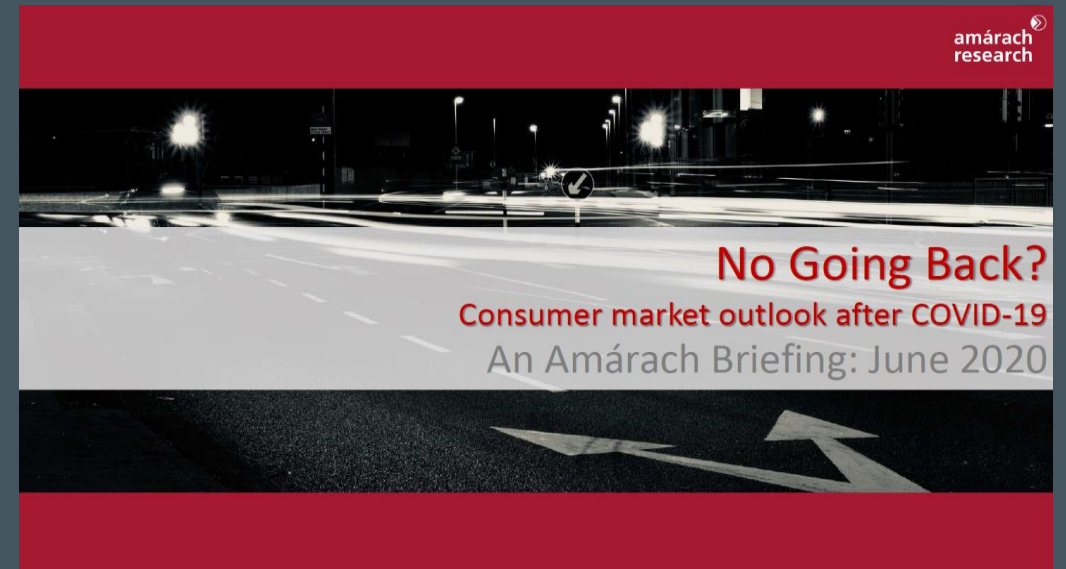


A briefing document published by Amárach this week called No Going Back points out that it takes about 60 days for a habit to become an automatic

one of those is our shopping habits. The shopping mission is perhaps more so a 'mission' than ever – queue outside, wear a mask, keep moving within store and pay via card

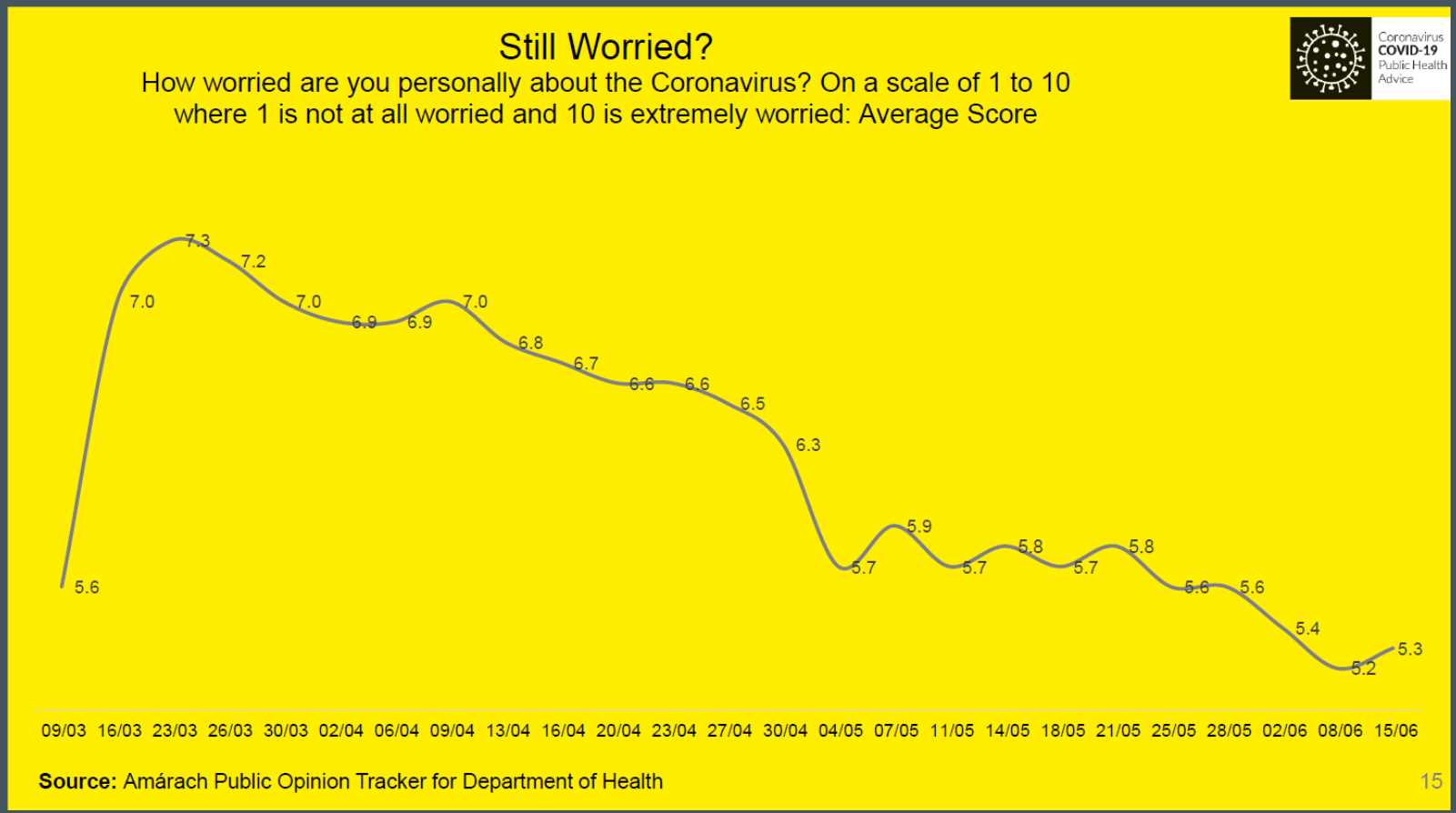
This 'get in, buy what you need, get out' type mentality suggests less browsing, less thinking on your feet and less impulse purchases in store.

In turn, it suggests that the importance of influencing the shopping list prior to entering the supermarket is more important than ever for FMCG brands and this will remain the case in the 'Next'. Out of Home has long been recognised as the 'Last Window of Influence' as it is the channel most consumers will encounter last before entering a store – both en-route, in car parks and at entrances to stores. OOH can influence the shopping list by driving mental availability and awareness of products. If brands can make the final connection with shoppers with relevant and flexible messaging it will bear fruit a few minutes later in store. Shopping local and with purpose plays to some of OOH's key strengths – location and context.

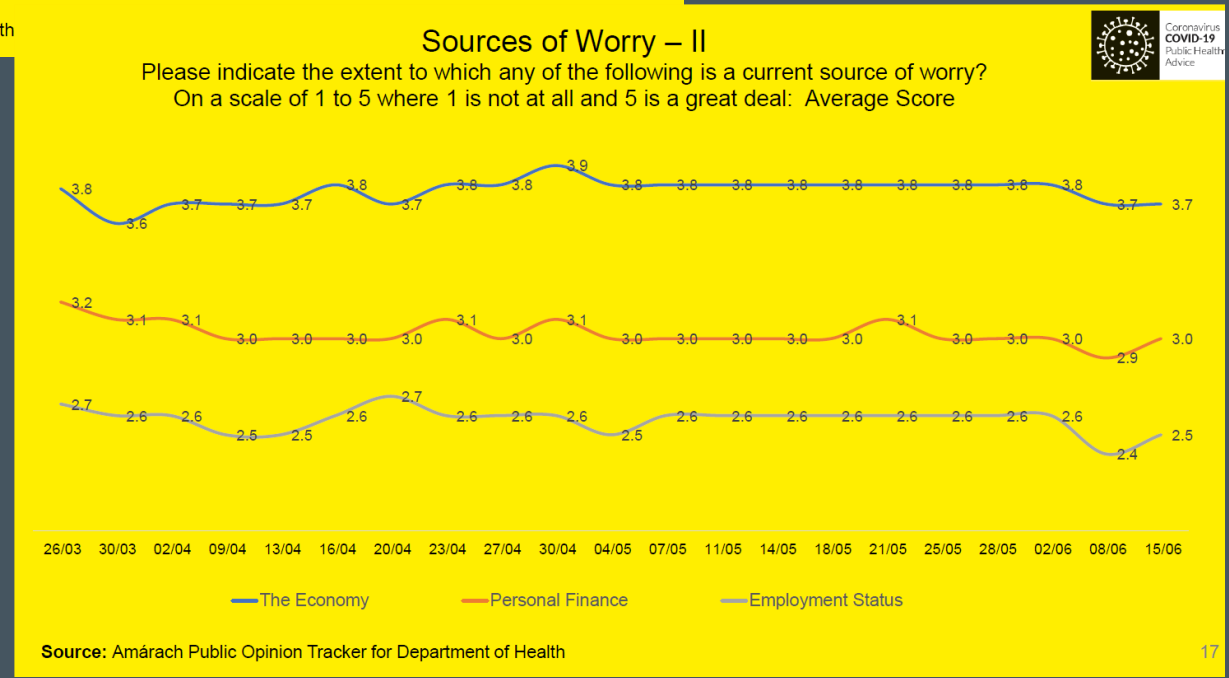
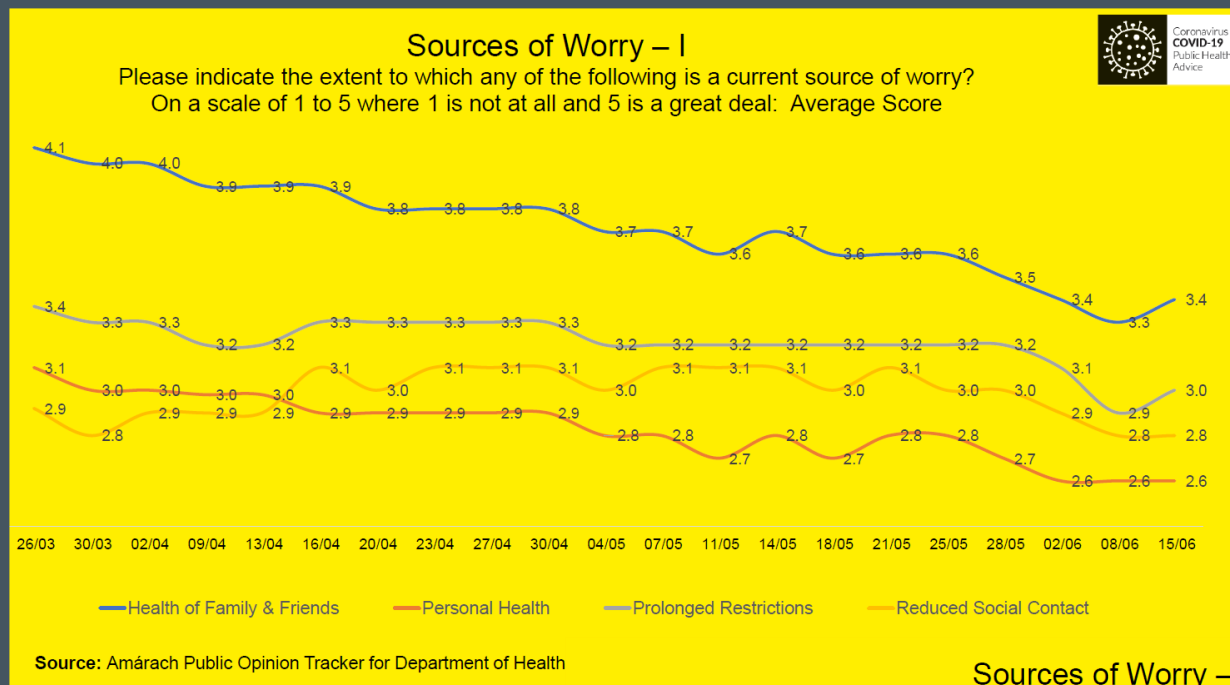


Amárach this week published their latest Public Opinion Tracking Research on Coronavirus, among a national sample of 1,800. Among many subjects covered in the extensive study is a section on anxiety and sources of worry.

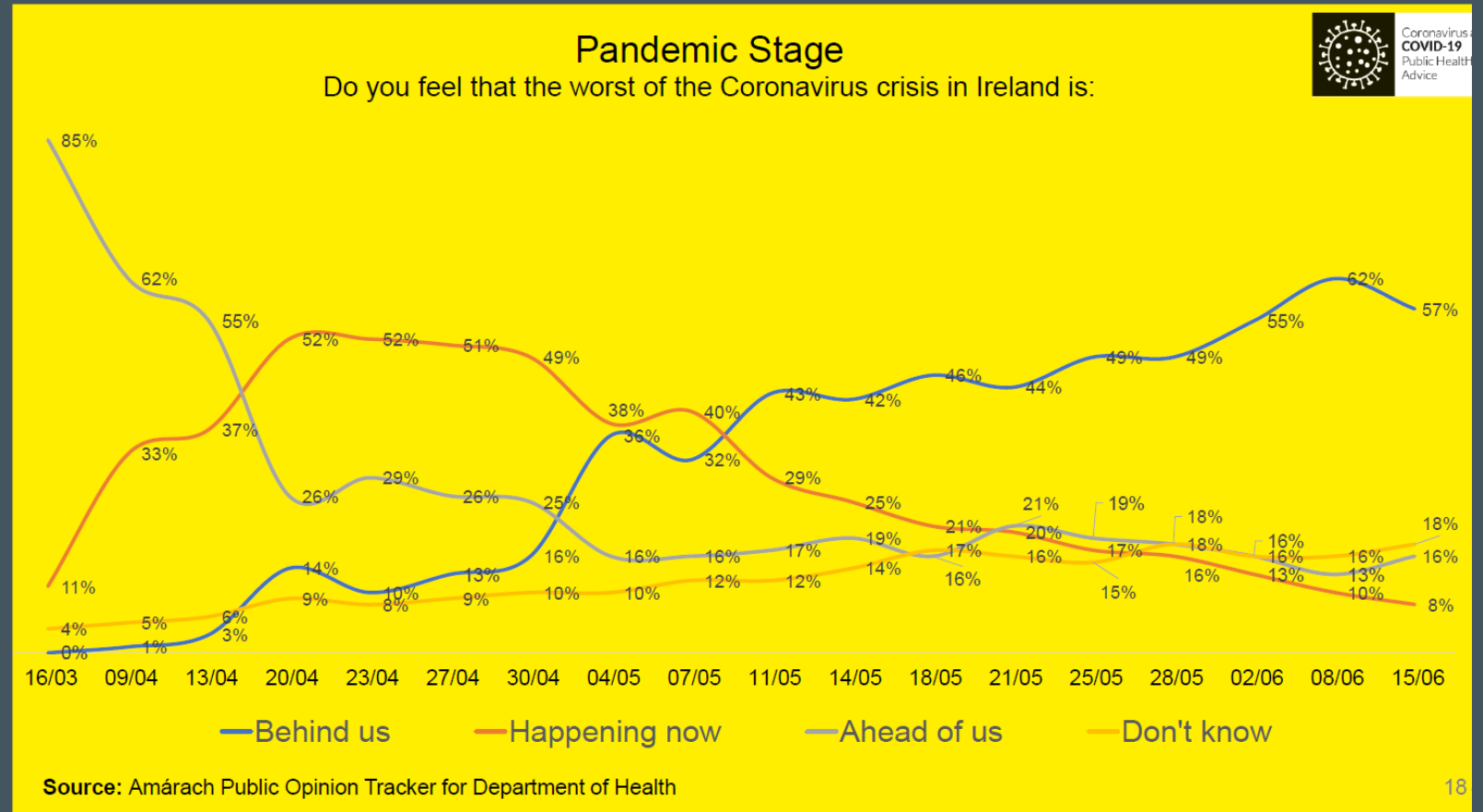
When it comes to overall worry about Coronavirus the trend is downwards and it has reached it's lowest level since early March. The current average on a scale of 1-10 is 5.3, compared to a peak of 7.3 in late March.



Interestingly, the economy has overtaken health of family and friends an the number one source of worry among the sample with the economy registering a worry score of 3.7/5 compared to health now at 3.4/5, down from its March peak of 4.1.



Most people (57%) believe the worst of the Coronavirus crisis in Ireland is now behind us, however a significant proportion (16%) believe the worst is still to come.

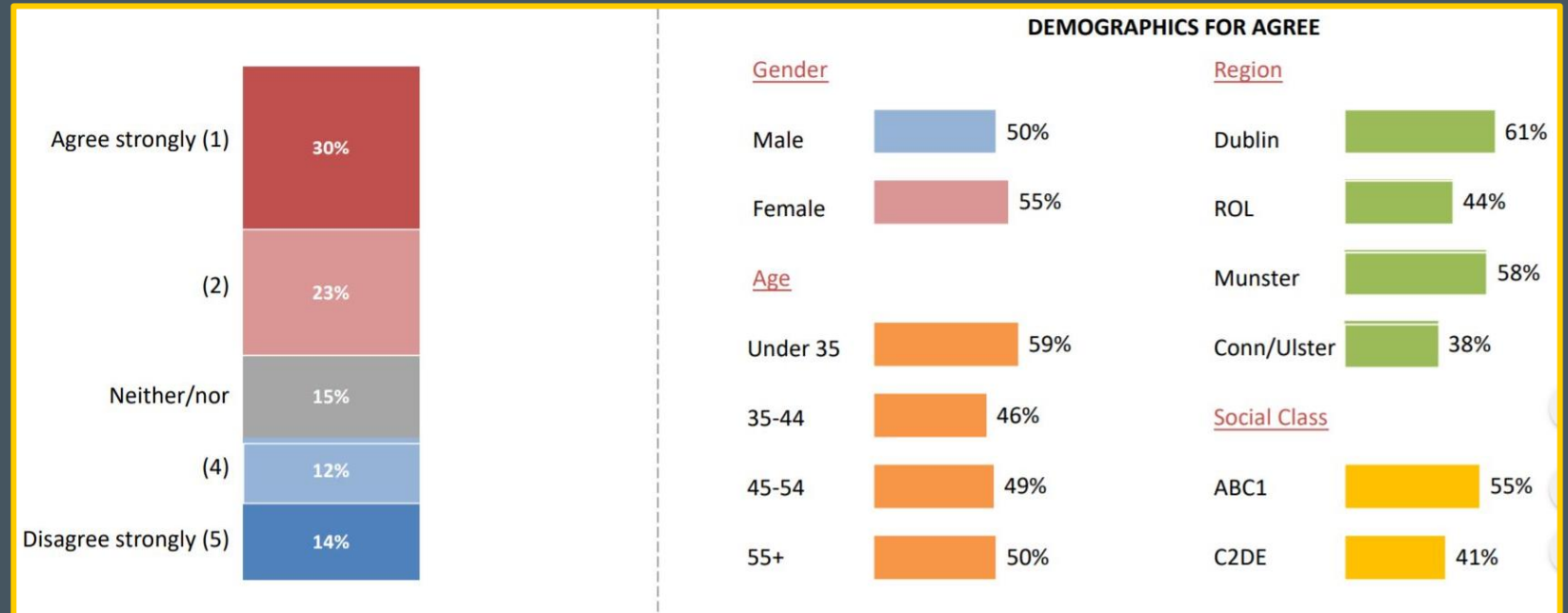


Another briefing from Amárach called Perspectives from Working from Home highlights high levels of frustration, stress, boredom and loneliness caused by working and living in the same space.

This is particularly true for the under 35s, who are most keen to return to a workplace environment.

Ultimately, twice as many would prefer to work in the workplace as against home – and higher among Dubliners and younger age groups.

At the end of the day I would prefer to work in the office.



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