



Opportunity in Out of Home



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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

Restrictions
on movement
eased to
20KM June
8th



Mobility
UP 25% this
week



High Street
to **Reopen**
June 8th



Full Dublin Bus and
DART timetables
operational **8th June**



Traffic now
almost **60%**
of pre-Covid
levels



Recreational
walking at
record levels
– **83%**



Grocery
Sales
UP 25%



“**Outdoor**
activities to
be the
macro trend
of the
summer”

Optimism Grows as Phase 2 Begins

Next Monday sees Phase 2 of the government's roadmap for the reopening of society and the economy get underway. After an extremely challenging two months for the sector, there are many reasons to be optimistic from an Out of Home point of view. Already in Phase 1 we have seen significant growth in the audience for OOH as restrictions ease and mobility has increased.

Phase 2 will see more retail reopening, limits on travel extended to at least 20KM and more opportunities for leisure activities and, of course, more people returning to the workplace and engaging in a commute again. The vast majority of OOH formats, both classic and digital are available to brands again and activity in the market is increasing and we expect Phase 2 to accelerate this demand further.



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Mobility

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Mobility

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

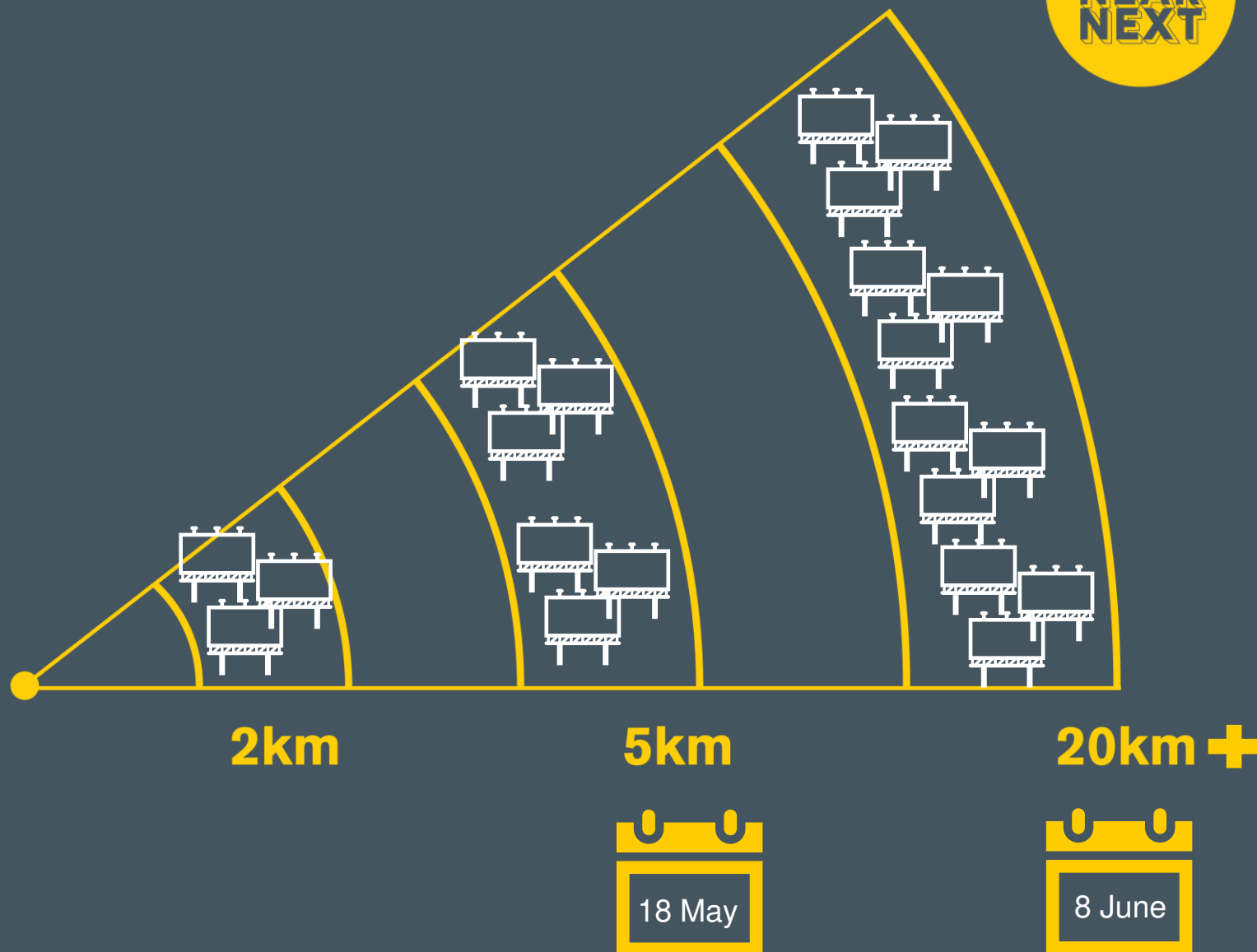
At PML Group, we are using multiple sources of mobility data to track behavioural changes in audience movement as the population adapts to their circumstances. These include Locomizer, Apple, Google and Transport Infrastructure Ireland.



NOW
NEAR
NEXT

Freedom of Movement!

Expansion of allowed travel distances means more movement, larger audience and increased coverage





NOW
NEAR
NEXT

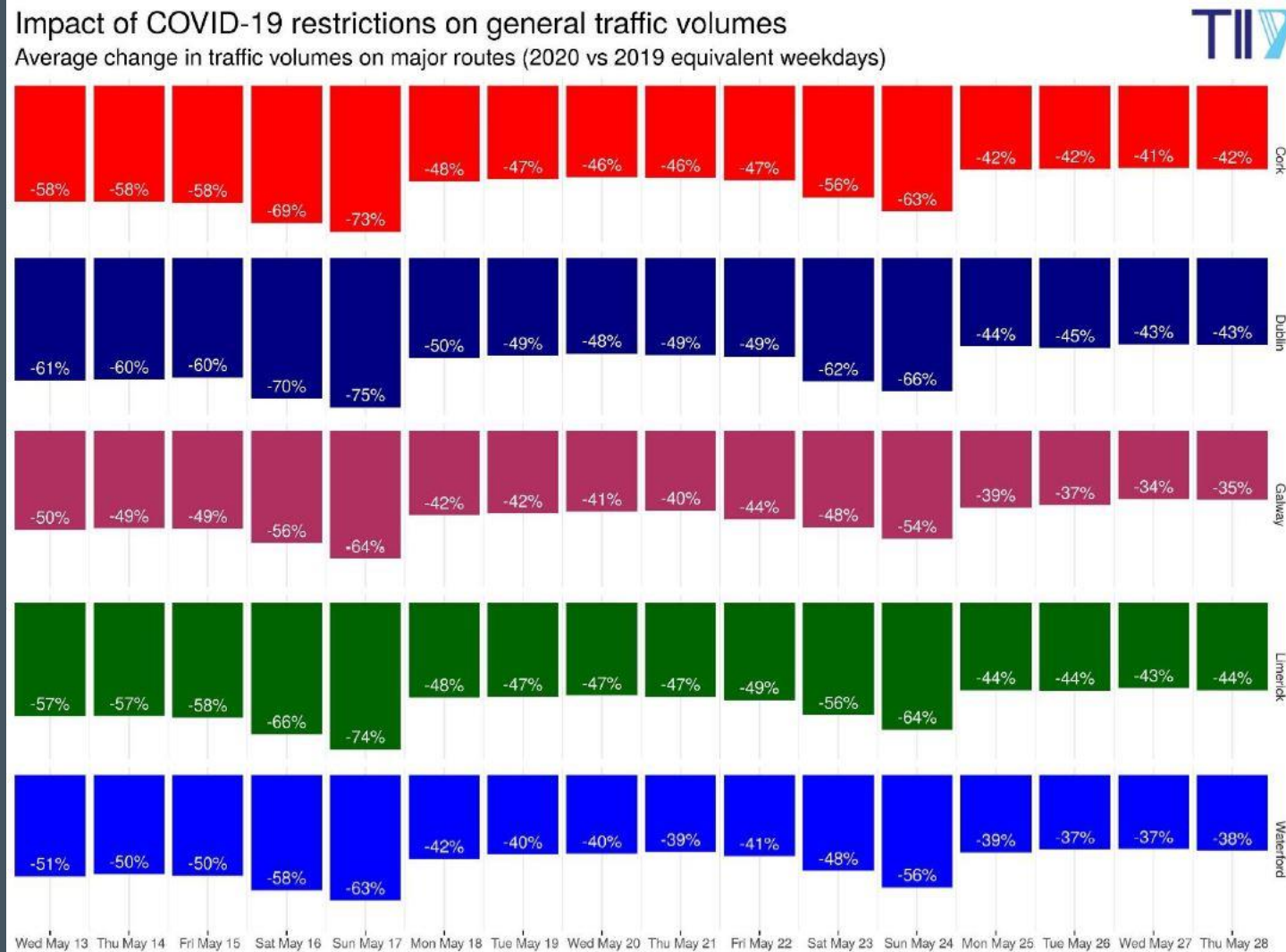
A full Dublin Bus and DART timetable will be operating again from June 8th.

Increasing access to Dublin again as more workers and shoppers return to city centre.



Traffic by City Vs. Same Day 2019

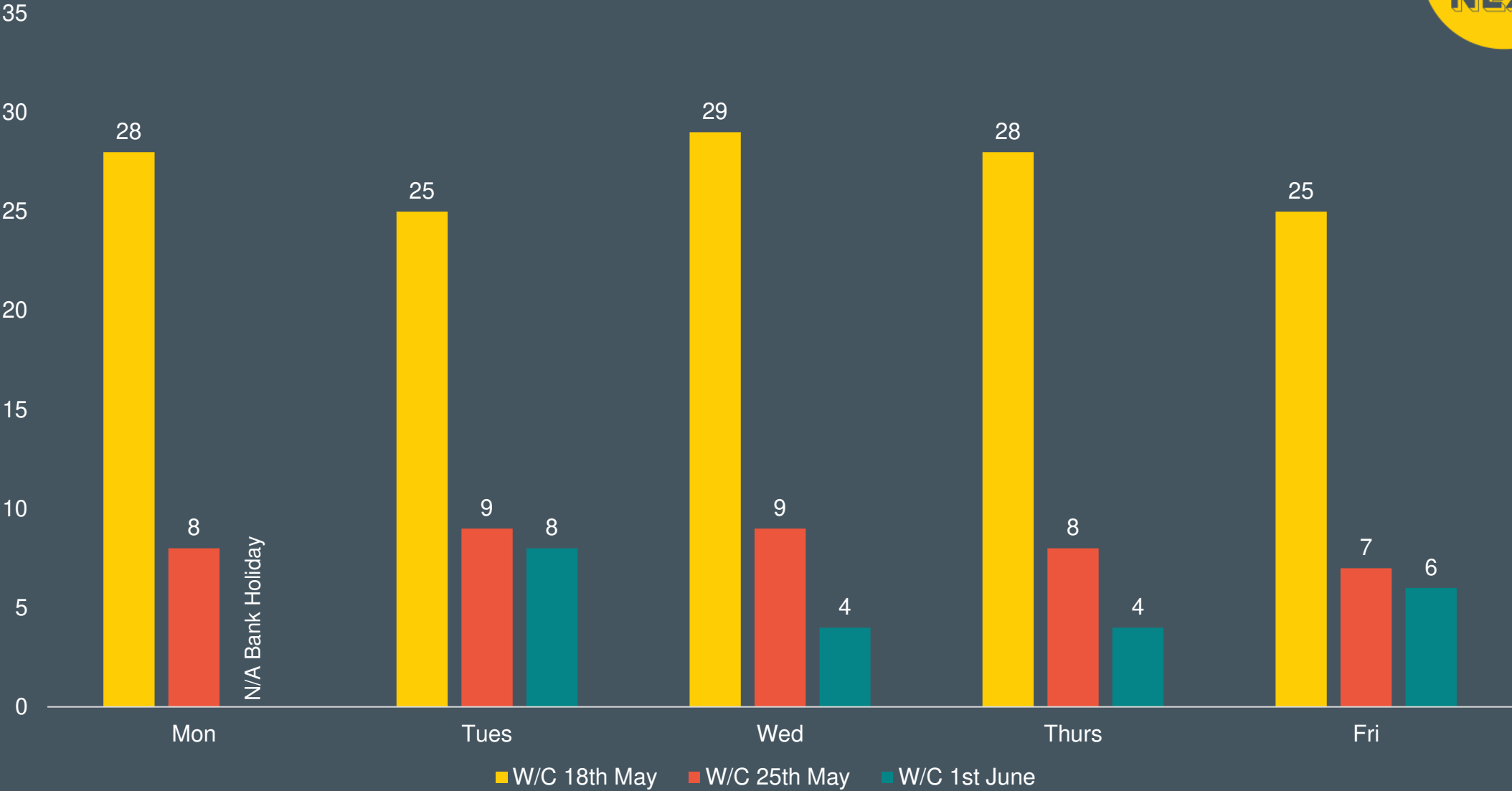
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Traffic levels
in Dublin on
May 28th were
-43% of same
day last year.

TII
Bonneagar Iompair Éireann
Transport Intelligence Ireland

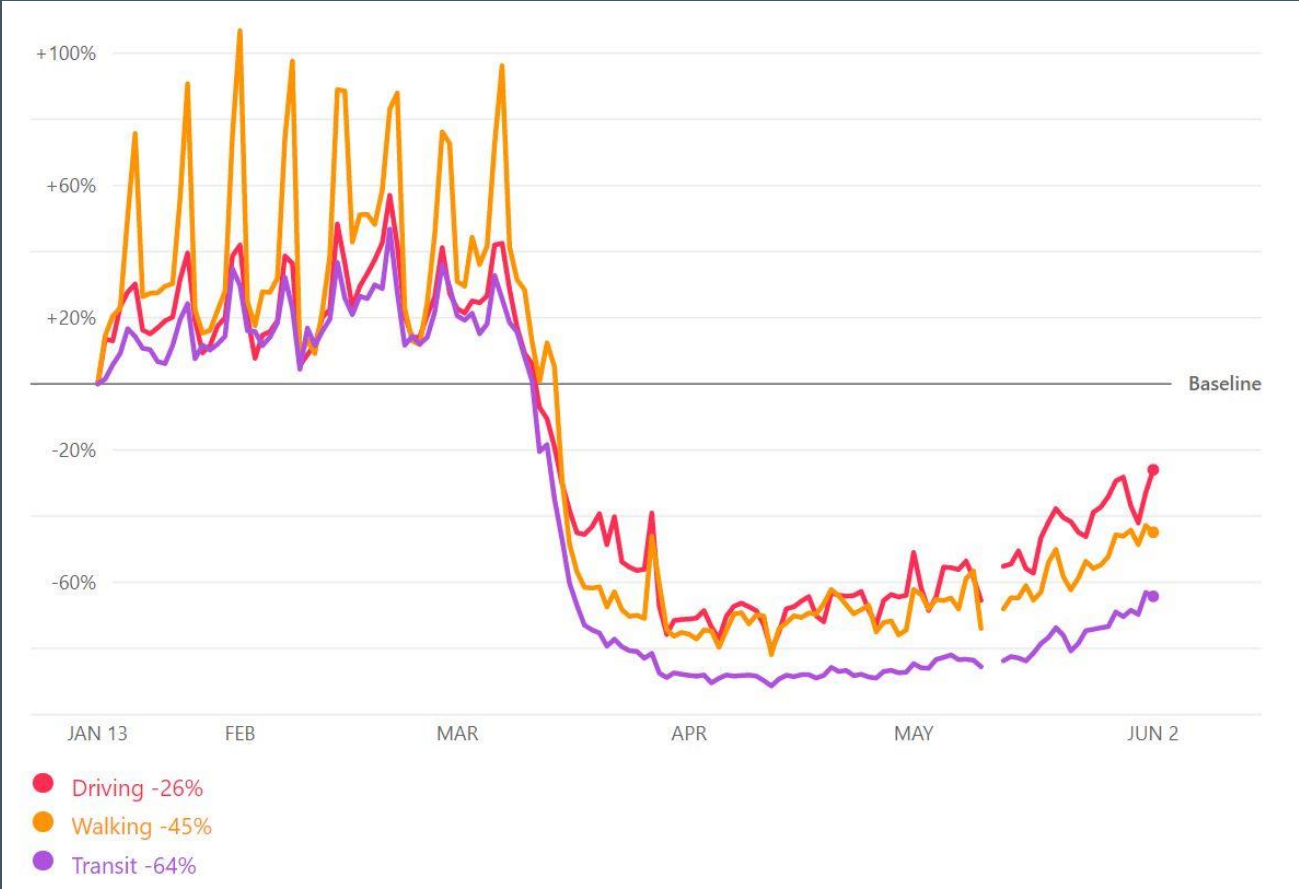
Phase 1 - % Increase by Day – Vehicular Traffic





Apple's routing requests reveal daily trends in mobility in terms of driving, walking and public transport. The latest data for Tuesday June 2nd, shows that nationally, **driving mobility is up 18% this week compared to a week ago and +131% up on the low point of April 14th**. Transit is up **36%** this week and has more than trebled since April 14th. Walking is up **22%** week on week.

Taking an average across the three transportation types, mobility is **up 25% this week and 144% on the lowest point**. The weekly bounce back is more pronounced in Dublin across driving (+21%), transit (+48%) and walking (+28%). Nationally driving is approaching three quarters of what it was on the first day of record, January 13th.



Google

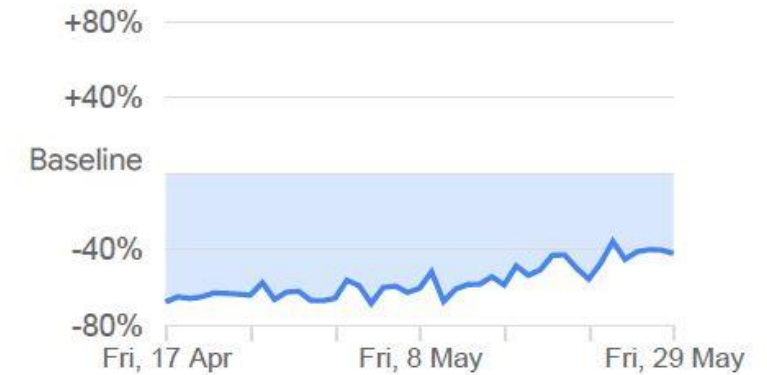
Google's latest Community Mobility Report (May 29th) shows a significant and steady increase in public transport station visits over recent weeks. The reports show how visits and length of stay at different places change compared to a baseline, in this case the baseline being the period Jan 3 – Feb 6 2020.

At one point in mid-April, the data indicated an approximate 80% reduction in visits to these areas but by May 29th this figure had increased to -42%. This still represents a significant audience for OOH in these hubs. The latest National Heavy Rail report (2019) indicates Connolly station had average daily boardings and alightings of almost 40,000. Pearse Street had a combined figure of 32,000+.

Public transport

-42%

compared to baseline





Dublin City Council

Comhairle Cathrach Bhaile Átha Cliath



Traffic travelling past OOH panels on many Dublin roads will be a lot slower as new speed limits of 30km/h are set to be introduced as part of new Covid-19 traffic laws.

The low speed limit will apply to roads which previously allowed speeds of 50km/h and 80km/h and will include the Royal and Grand Canals and the Rathmines, Ranelagh, Harold's Cross and Donnybrook Roads on the southside of the city and Phibsborough Road, Dorset Street, Manor Street and Gardiner Street on the northside.

This major change will further enhance OOH's ability to engage passing traffic in some of the highest density traffic areas of the city.





Retail

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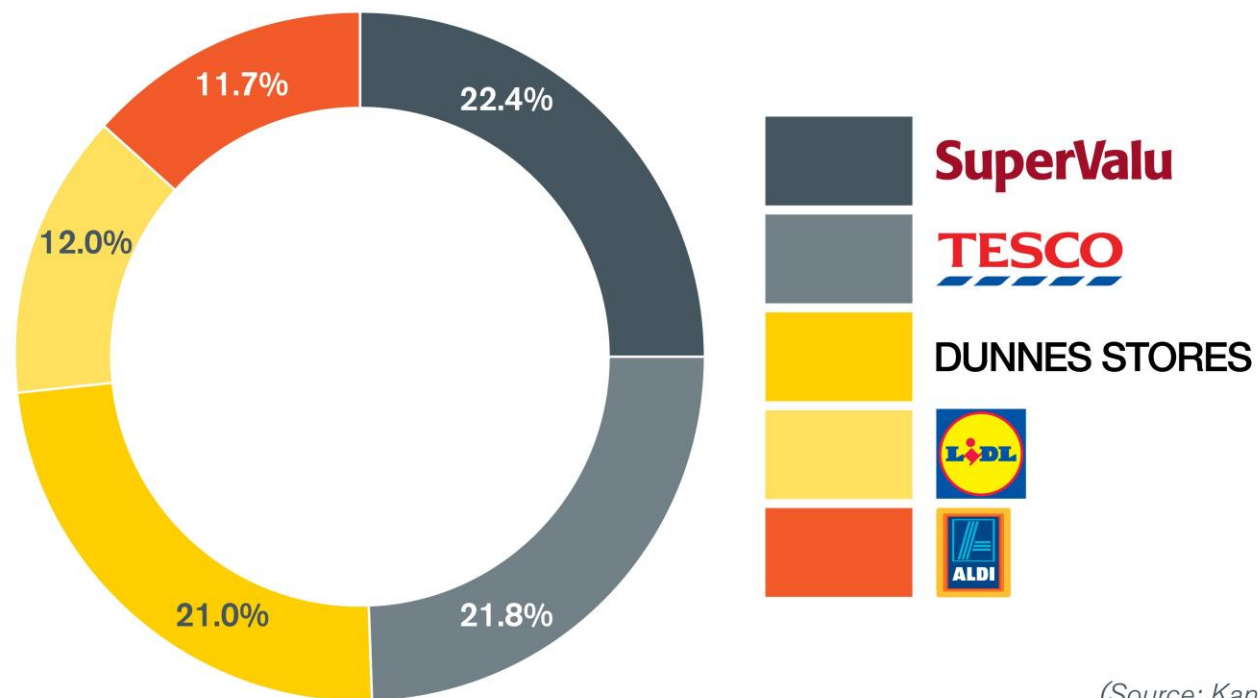
KANTAR

Grocery Sales Continue to Surge

Kantar's latest 12 week analysis of the grocery sector in Ireland shows that sales rose by 25% for the three month period to May 17th. Families with children under 16 increased their spend by 30%.

In recent weeks, through Now Near Next, we have highlighted shifting OOH audience behaviour and a temporary change from an urban to suburban bias as lockdown was enforced. This is reflected in SuperValu claiming the largest market share, with the retailer benefitting from its locally-focused outlets, and consumers shopping closer to home. It grew sales by a whopping 33% and welcomed 64,000 additional shoppers to its outlets in the period researched.

Supermarkets – Grocery Sales Share – 12 Weeks to May 17th



(Source: Kantar)

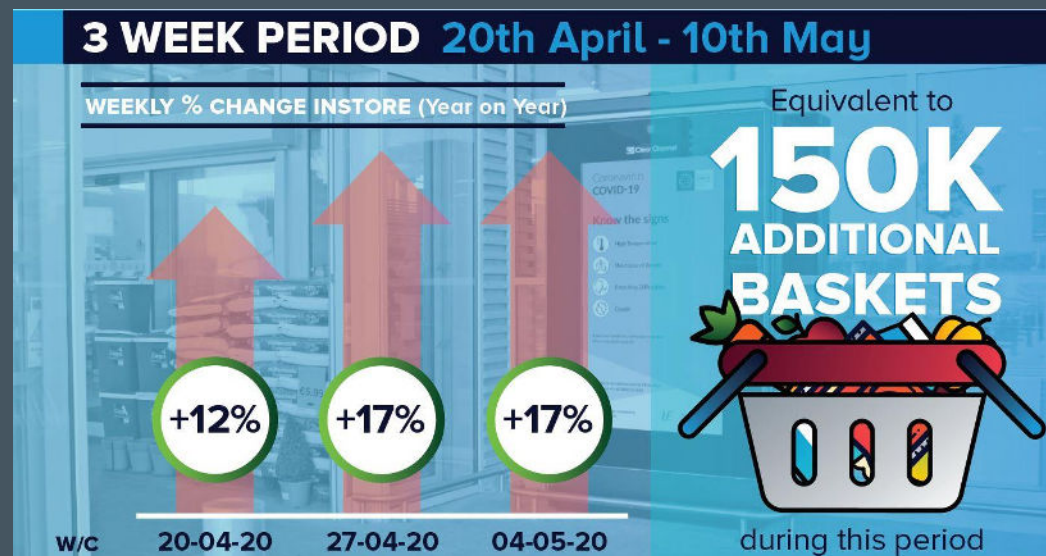
dunnhumby

Tesco Adds '150,000 Baskets' in April/May Surge

Latest data from dunnhumby Ireland and Clear Channel shows a sales increase in Tesco stores the equivalent of 150,000 additional basket between April 20th and May 10th.

With dining out not an option these days, customers are turning their hands to more diverse home cooking. An example in Tesco stores was a more than 100% increase in Mexican food cooking aids across the four week period.

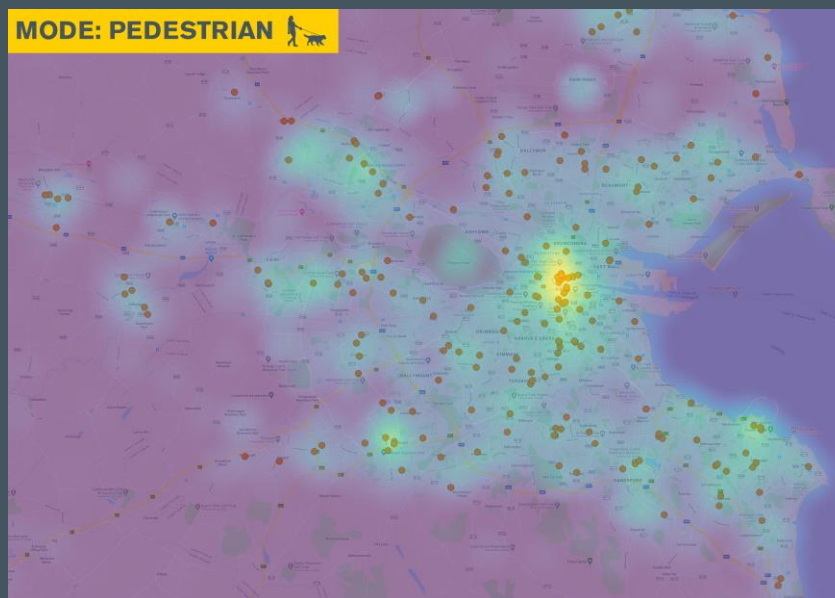
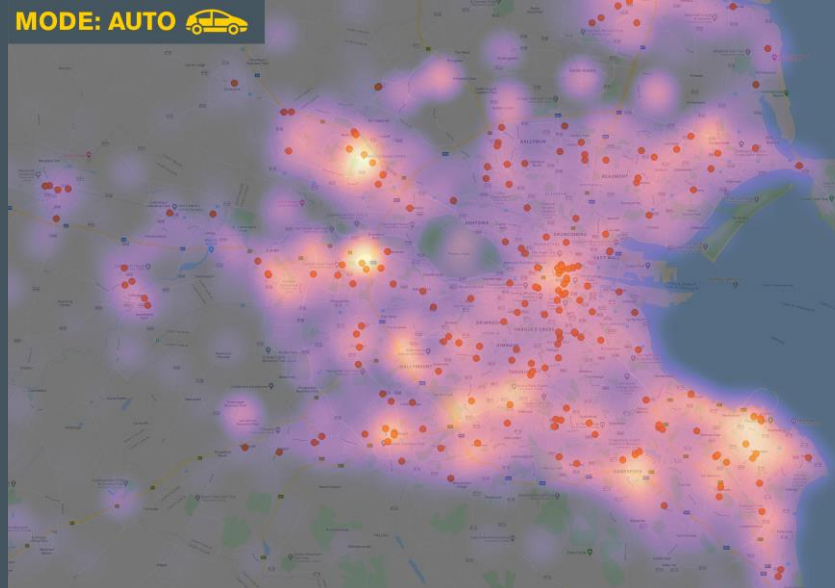
It is such figures that are bringing advertisers to point of sale and recent brands up on the Tesco Live network include AIB, Safefood, National Lottery and Pringles.



locomizer

This week we've fused Locomizer auto and pedestrian volumes for the week 26-31 May with the 783 supermarket locations contained within our Pinpoint mapping database of POIs.

Hotspots are visualised based on a combination of time and users giving a complete picture of mobility. These outputs can be further overlaid with OOH panels to give brands the opportunity to engage the expanding OOH audience on path to purchase.





BROWN THOMAS | ARNOTTS

Major High Street Reopening will drive footfall back to City

All major retail outlets including high-street fashion stores will be able to open their doors to customers for the first time in months next Monday. The lifting of the retail ban will allow major chains such as Ikea, Zara, H&M and TopShop among many other shops reopen in the coming days.

A development which is sure to help drive footfall back into the heart of Dublin is the reopening of Brown Thomas and Arnott's next week. Following the Dublin reopening, BT stores in Cork, Limerick and Galway will reopen in similar circumstances later in the week.





Leisure

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Recreational Walking at Record Levels

Research released by IpsosMRBI and Sport Ireland last week revealed that a record **83%** of respondents have taken part in recreational walking in the past week and that participation in sport is back at the levels it was pre-restrictions.

Here we can see how these figures breakdown by **demographic and area**.

Participation in recreational walking during previous 7 days

		Prior to Restrictions	Delay Phase	Stay at Home Phase		
				Weeks 1-3	Weeks 3-5	Weeks 5-7
Gender	Men	61	71	75	75	80
	Women	70	81	81	82	86
Age Group	15-24	51	75	82	86	89
	25-34	64	76	82	75	85
	35-44	65	81	85	81	86
	45-54	75	80	78	83	83
	55+	67	70	69	73	76
Location	Dublin	60	75	80	79	81
	Rest of Leinster	68	78	82	79	82
	Munster	66	75	76	78	85
	Connacht/Ulster	68	76	71	77	83
Social Class	ABC1	67	82	87	85	87
	C2DE	64	74	71	75	79

- Increases in recreational walking among both genders and across all age groups, particularly among those aged under 35.
- The recent increases in recreational walking are stronger in areas outside Leinster.
- Recent increases in recreational walking are also seen more strongly among those in C2DE social class.
- Previous waves of the Irish Sports Monitor found that recreational walking is most likely to take place on local roads and in local parks.



Domestic Tourism Boost with NI hotels to reopen

Last week in Now, Near, Next we covered a piece on the escalating interest in domestic tourism as more Irish people look to holiday options nearer to home this summer. The sector was given a boost this week with the announcement that hotels in Northern Ireland are to reopen on July 20th.

Another positive this week was news that Dublin Zoo is open for business again. Although initially restricted to 1,000 patrons a day, this will doubtless expand in time and is another fillip for the city.





Sentiment /Insight

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Research from Nielsen in the USA among 1,000 adults in early May to understand consumer sentiment in light of the COVID-19 crisis has some interesting insights for the OOH industry.

Nielsen found that consumers' attitudes fit into three buckets:

- Wait and See
- Proceed with Caution
- Ready to Go



Those among the “Ready to Go” group are more likely to be younger, affluent, and with young children in the home. And they are 30% more likely than the total population to have been in a vehicle in the last day.

9 out of 10 of those in the “Ready to Go” group are very optimistic, expecting life to return to normal within a short window of time:

Index of people who are “ready to go” vs. total	
Persons 25-54	108
Persons 55+	87
Have kids 2-11	135
Income \$100K+ per year	112
Time in vehicle in last day	130





What a great opportunity for OOH and for brands to make a major impact in the **Near** and the **Next**.



One of the take outs for brands in this week's B&A Life in Lockdown series is that:

"Outdoor activities and socialising are the macro trends of the summer and there will be many opportunities for brands to deliver here. However, it's worth thinking outside the box. There will be lots of interest in a new take on the picnic or BBQ occasion. Better still, creating something different entirely. If the Zoom quiz characterised the early lockdown period, can your brand come up with something that will define the summer months?"

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