



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.



Audience continues to grow through Phase 1

We are now more than halfway through phase one of the government plan for the reopening of society and the economy and phase two will kick off in a little more than a week's time on June 8th.

Evidence of increased mobility of audience has built during phase one and we report on the latest figures for this week in this report. This increased mobility is also reflected in increased numbers being back in the workplace and this week saw the release of some revealing information regarding the workplace, which we also feature.

We also look at how technology will create opportunity for OOH advertisers and how home tourism will have a major impact on the OOH audience this summer.





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.



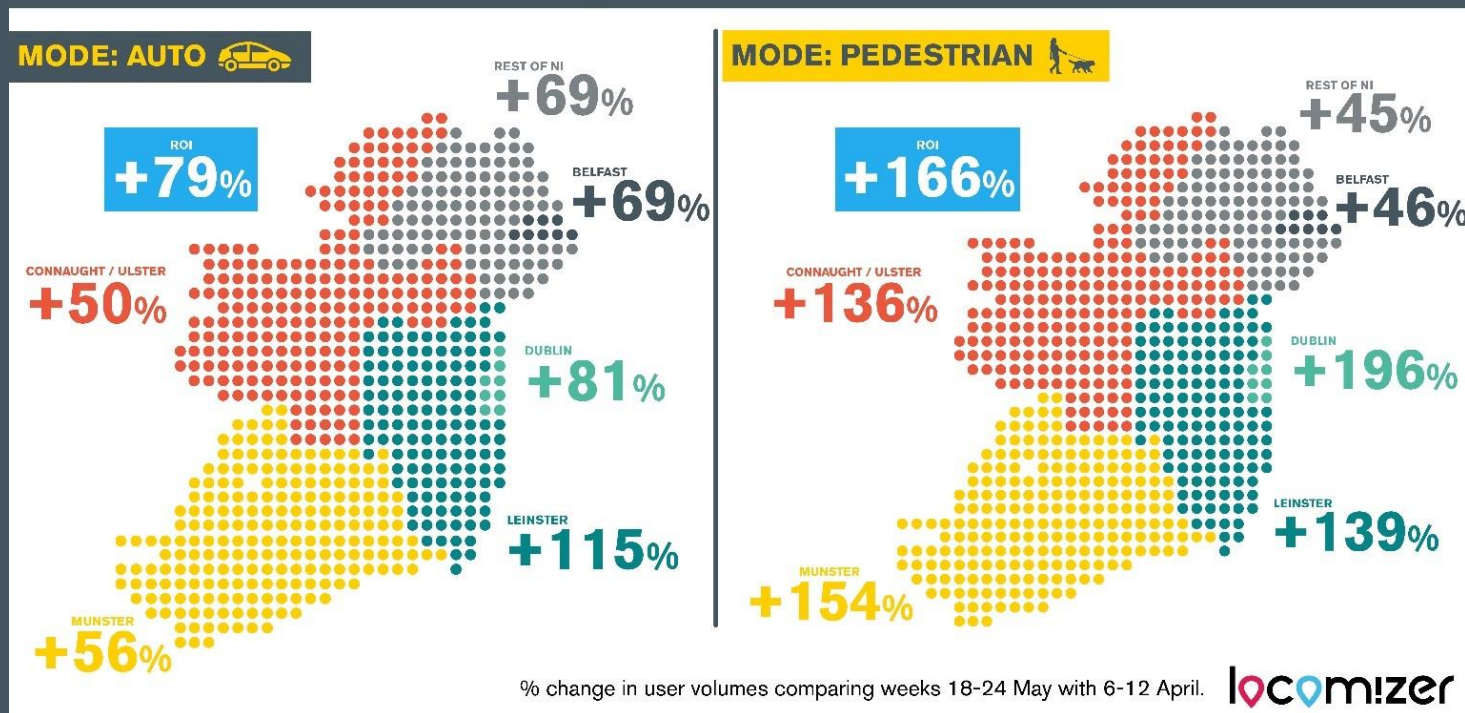
May 25th, Dublin

locomizer

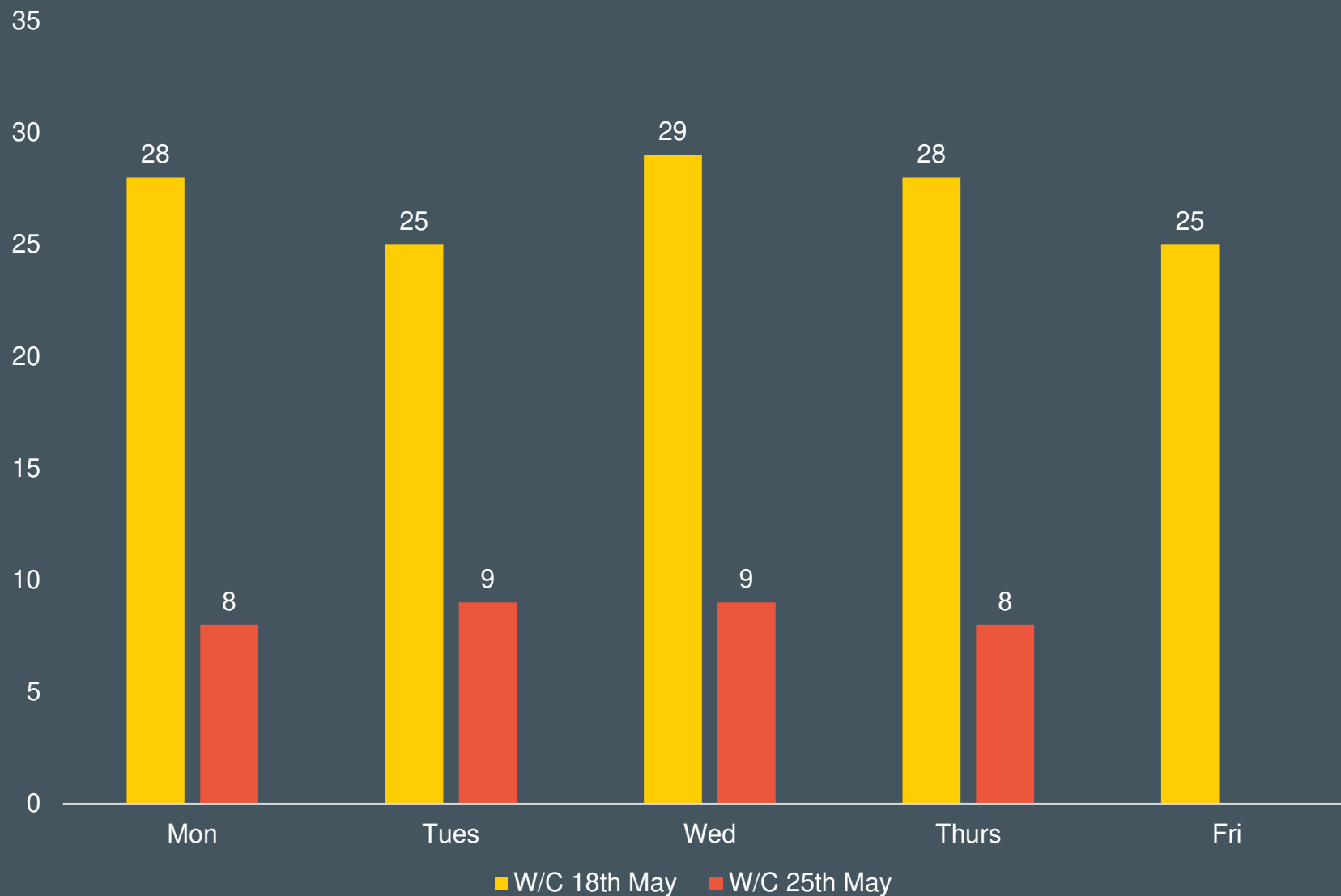
This week we compare user figures based on individuals generating at least one signal per small area district across two weeks; 6-12 April and 18-24 May. Uplift in both auto (all forms) and pedestrian modes of movement is witnessed.

Over the five weeks auto mobility is up 79% in ROI while pedestrian movement is up 166%. Looking regionally, Leinster has seen the biggest rise in auto mobility at +115% while growth in pedestrian movement growth is at its highest in Dublin City at +196%.

Increasing Audience Movement



% Increase by Day – Vehicular Traffic



**Traffic levels
now at 50%
of same
week last
year.**

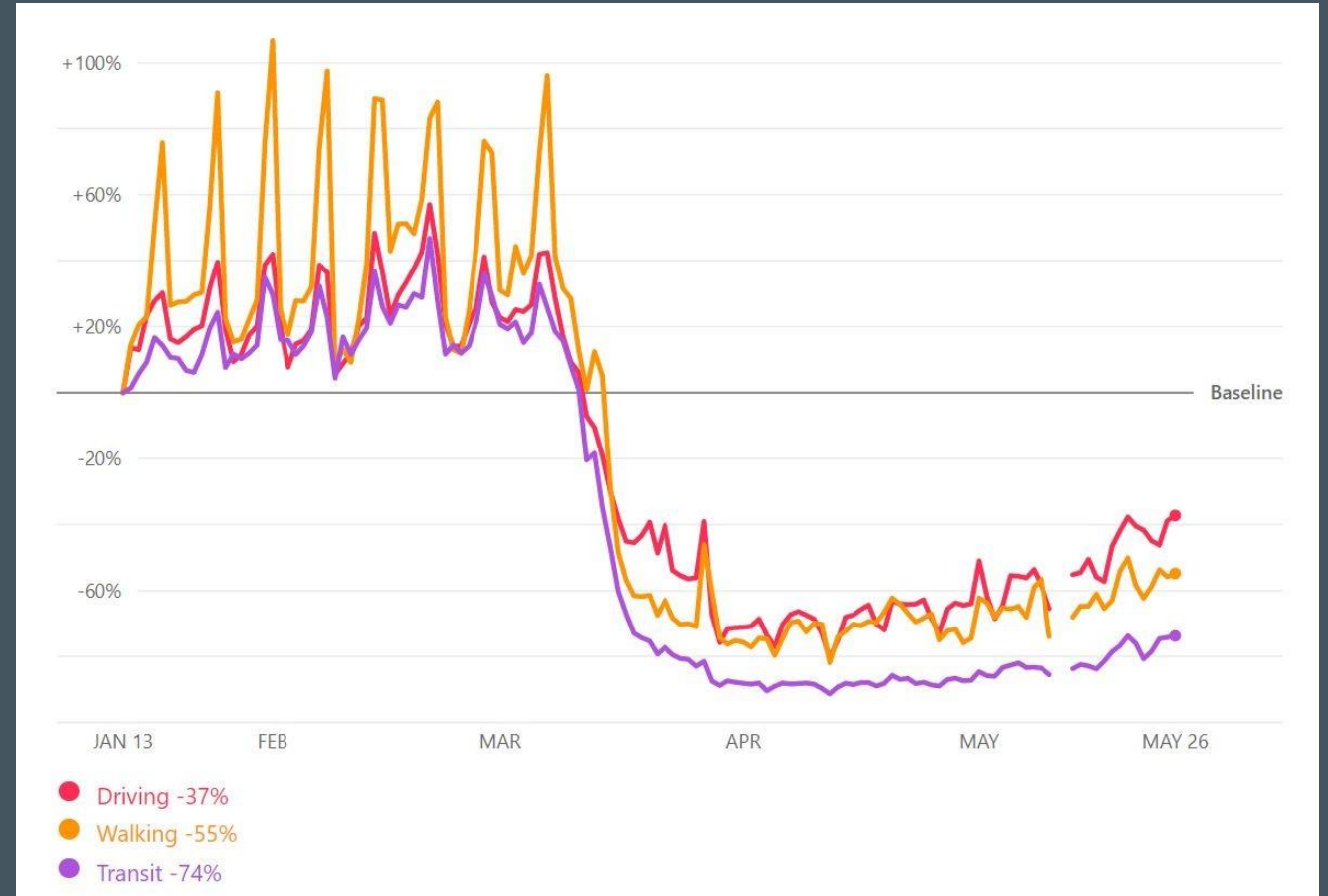
The logo for Transport Infrastructure Ireland (TII), featuring the letters 'TII' in a stylized blue font, with the tagline 'Bonneagar Iompair Éireann' and 'Transport Infrastructure Ireland' below it.



Apple's routing requests reveal daily trends in mobility in terms of driving, walking and public transport.

The latest data, up to May 26th, shows that driving mobility is up 8% this week compared to last and 96% up on the low point of April 14th.

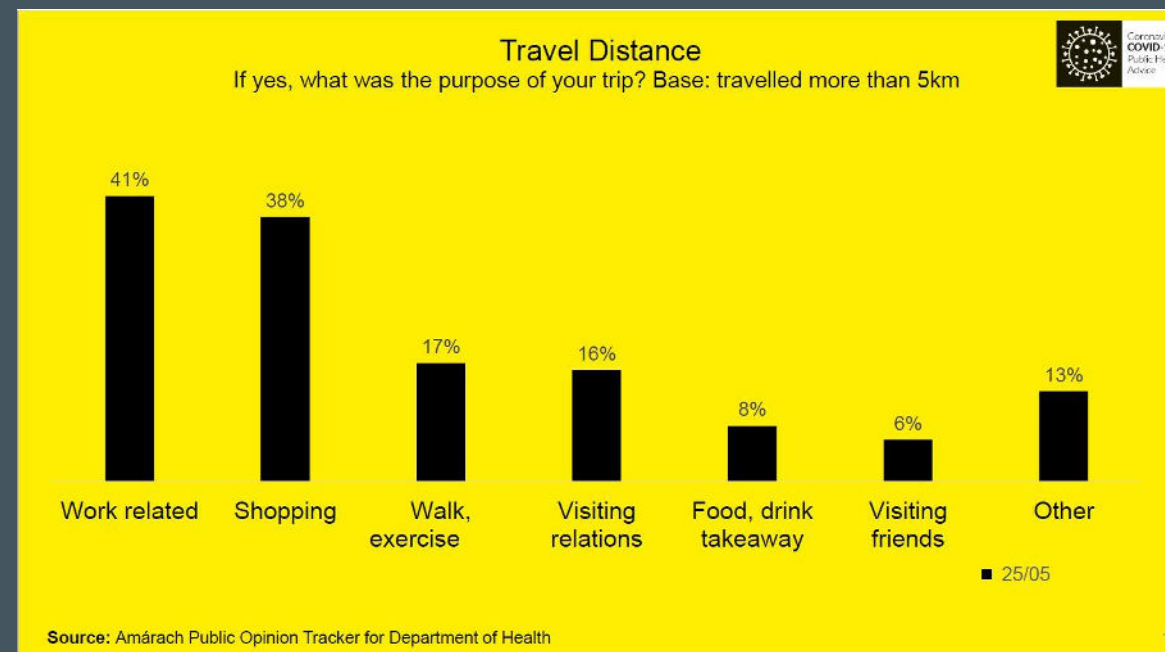
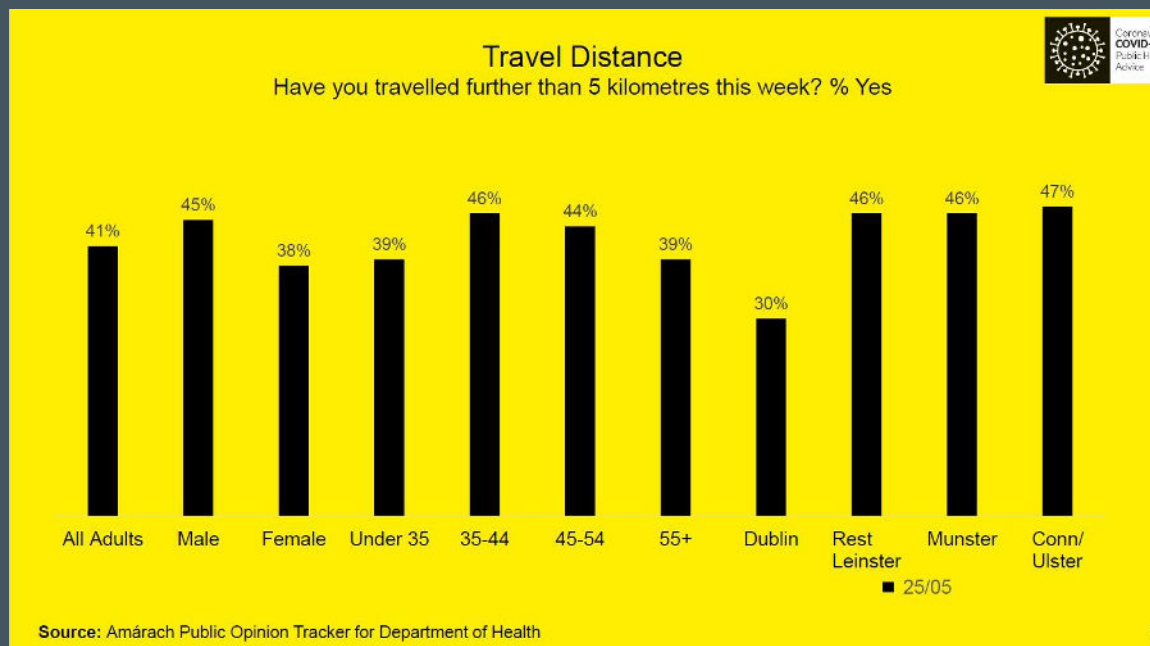
Transit is up 13% this week and has more than doubled since April 14th. Interestingly, walking is down 2% on the week, perhaps indicating a movement back to other transport forms as restrictions have been eased. As a whole, mobility is up 6% this week and 93% on the lowest point.





45% of males and 38% of females have travelled further than 5KM in a single journey in the past week, according to new figures from Amárach.

The 35-44 age group is the one to have travelled more than 5KM the most in that period. The research also shows that Dubliners are stuck more rigidly to their 5KM radius with 30% travelling beyond that distance, compared to 46% in Munster.





Leisure

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Leisure

Staying in (car) is the new going out

Research we conducted in April highlighted outdoor events such as festivals and concerts as one of the main things people were looking forward to doing again when restrictions eased. This week we saw how such events may look with social distancing a reality for the medium term at least. Gavin James was announced as headline act for a series of Drive-In live shows in July and August at venues in Limerick, Cork, Waterford and Kilkenny. Up to four 'carevellers' per vehicle will be permitted.

Such events will literally drive traffic to venues from all around the country and OOH is perfectly suited to engaging this new audience – both at the venues and en route.

LIVE AT THE
DRIVE-IN
PRESENTS

GAVIN JAMES

BOXES
DRIVE-IN TOUR

JUL 24 THE GREENPARK SITE LIMERICK
JUL 31 CORK SHOWGROUNDS CORK
AUG 7 TRAMORE PROMENADE WATERFORD
AUG 10 GOWRAN RACECOURSE KILKENNY

TICKETS ON SALE FRIDAY!

*SUBJECT TO ALL PUBLIC HEALTH GUIDELINES

TICKETS & INFORMATION WWW.LIVEATTHEDRIVEIN.IE

Live at the Drive-In MPI BSG

Leisure

Recreational Walking at Record Levels

Research released by IpsosMRBI and Sport Ireland this 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.

Half of all adults are currently meeting the physical activity guidelines by being sufficiently active for 30 minutes each day on 5 days each week.



Leisure

Unprecedented Number of People Cycling

Cycling Ireland this week reported on research that found an unprecedented number of adults are cycling every week. The latest figures show an estimated **510,000** people within the Republic of Ireland are enjoying cycling as a form of exercise, participating at least once per week. This marks an increase of approximately 260,000 people compared to the same time last year.

Cycling Ireland CEO Matt McKerrow welcomed the figures; “I think everyone in the cycling community has anecdotally noticed more people cycling in and around their towns and suburbs recently, but it is great to see the research with numbers quantifying the levels of increased participation.



Leisure

Interest in Domestic Holidays Grows

With uncertainty lingering over travelling abroad, many holidays and foreign getaways have been cancelled or placed on hold for the time being.

As a result staycations look to be more popular than ever this year. New research from Core Optimisation published on marketing.ie this week, shows a piqued interest in domestic getaways.

The lack of foreign travel in 2020 will inevitably lead to an increased domestic audience for OOH advertising, especially across the summer months.





Retail

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Retail

FMCG Sales Surge Ahead

Off- trade alcohol sales surged by 59% in the week ending 10 May, compared to the same period last year, research conducted by Nielsen shows. Alcohol sales have reached a record €6million a day during lockdown, equating to €342.5 million spend in the past 8 weeks. Typical pub drinks such as stout and gin rocketed by 155% and 38% respectively.

The same research concluded that overall FMCG sales reached

€333million in the week ending 10

May, **12.5% higher** compared to the same week last year.



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McDonald's Drive-Thru

McDonald's is back to full drive through capacity next week, with the QSR announcing that all of its drive-thru restaurants in Ireland will reopen by Thursday June 4. Its 95 restaurants contribute close to €200m to the Irish economy, according to the company.

All outlets are mapped on our Pinpoint platform and overlaid with OOH sites in the vicinity





Sentiment /Insight

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Insight.....The Next

How 'Covid tech' will influence OOH

As we move through the various phases set out by the government for the reopening of the economy and society, innovative technological solutions to the logistical issues of our changed environment may well have implications for OOH communications.

We are already seeing some evidence of this emerging as business across the world adapt for what's coming next.

Digital Hand Sanitisers

Hand sanitizers are one of the first touch points that the public will encounter as they enter an outlet. New digital advertising screens with built-in sanitizer dispensers are coming on stream.

NOW
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Insight.....The Next

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How 'Covid tech' will influence OOH

Queuing Systems

As socially distanced queuing becomes a normal part of our day to day lives, companies have been looking at innovative ways to improve the customer experience. Cue intelligent digital signage and virtual queuing software.

Intelligent digital signage can be used to count customers entering and leaving retail outlets, thus delivering a real time stop/go system. The signage can also communicate brand messaging to those waiting patiently to gain entry and offer a welcome alternative to the phone screen for some distraction.



Insight.....The Next

How 'Covid tech' will influence OOH

Self Service Interactive Screens and Mid-Air Haptic Technology

In order to minimise human contact, there has been a rise in self-service interactive kiosks and screens, similar to the interactive order screens often found in McDonalds restaurants.

In an effort to eliminate the “touch” element, mid-air haptic technology is accelerating. Mid-air haptic technology allows you to interact with interactive digital screens using hand gestures rather than physical touch.

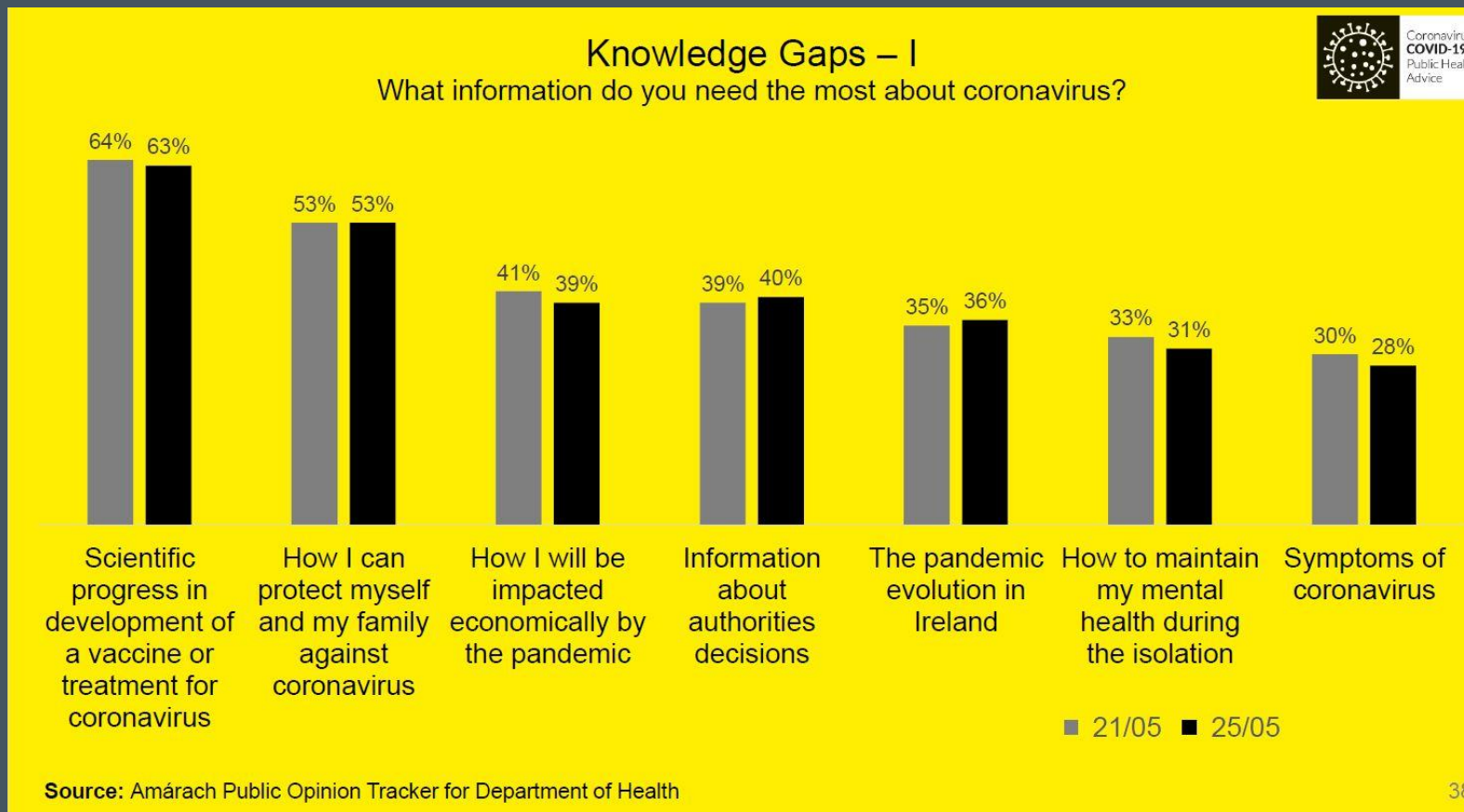
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In research by PML group in April we found that 77% of respondents agreed that OOH was a very effective channel for communicating public information messaging.

The research from Amarach this week shows substantial knowledge gaps among the public regarding Covid – including how to protect against Coronavirus and information about decision by the authorities.



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