

Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"With a high level of consumers taking steps to avoid promotional content, advertisers could look to strike a new deal with consumers. Offering incentives to view advertising could encourage them to re-engage with online advertising."

– James Wilson, Research Analyst

This report looks at the following areas:

- What are the main advertising channels used to reach I rish consumers?
- Are Irish consumers exposed to too much advertising?
- What are Irish consumers' attitudes towards advertising?
- What are the main drivers of the advertising industry in Ireland?

The advertising industry in Ireland continues to recover, with growth in spending expected to continue in 2015 and beyond. This is being driven by the growth in online adspend, and mobile in particular. However, Irish consumers do not rate online advertising methods as effective in catching their attention and they are even taking steps to avoid it. That said, it could be that online advertising is reaching Irish consumers at a subconscious level and is thus a somewhat effective method for promoting goods and services.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Market s Data sou Definition Abbrevia ecutive The mari Forecast Figure Market fa Ad-block	ns tions Summary ket 1: Indexed estimated advertising revenues, NI and RoI, 2010-20
Data sou Definition Abbrevia ecutive The mark Forecast Figure Market fa Ad-block	Irces Ins Itions Summary Ret I: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
Definition Abbrevia ecutive The mari Forecast Figure Market fa Ad-block	ns tions Summary ket ative 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
Abbrevia ecutive The mark Forecast Figure Market fa Ad-block	tions Summary ket e 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
The mark Forecast Figure Market fa Ad-block	Summary ket e 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
The mari Forecast Figure Market fa Ad-block	ket e 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
Forecast Figure Market fa Ad-block	e 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
Figure Market fa Ad-block	e 1: Indexed estimated advertising revenues, NI and RoI, 2010-20 actors ing has financial impact for advertising industry
Market fa Ad-block	actors ing has financial impact for advertising industry
Ad-block	ing has financial impact for advertising industry
Social ne	etworks are important advertising channels
New vlog	gger guidelines to provide greater clarity on promoted content
Digital di	rives overall growth in readership of newspapers in Rol
Smartph	one and tablet ownership continues to grow
Compani	ies, brands and innovations
The cons	sumer
	dvertising more effective in reaching Irish consumers than online methods
Figure	e 2: How effective consumers find different methods of advertising to be (1 being the most effective and 5 being the least ive), NI and RoI, June 2015
	sumers see an increase in volume of advertising
Figure	e 3: Agreement with statements relating to advertising, NI and RoI, June 2015
Consume	ers understand that advertising keeps services free
Figure	e 4: Agreement with statements relating to advertising, NI and RoI, June 2015
What we	think
ues an	d Insights
What are	e the main advertising channels used to reach Irish consumers?
The facts	5
The impl	ications

The facts

The implications

What are Irish consumers' attitudes towards advertising?

The facts

The implications

What are the main drivers of the advertising industry in Ireland?

The facts

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

	-ket Overview
	Key points
(Dnline ad-blocking a key issue for advertising industry Figure 5: Global monthly active users (MAUs) of ad-blocking software, January 2013-June 2015
/	Apple's iOS 9 update to change the game for mobile advertising Figure 6: Type of mobile phone device used by consumers (main device only), NI and RoI, March 2015
F	acebook and YouTube the most popular social media platforms in Ireland Figure 7: Social networks used by consumers at least once per week, NI and RoI, March 2015
	Figure 8: Media networks used by consumers at least once per week, NI and RoI, March 2015
ç	Social networks launching new services to boost appeal to advertisers
1	New vlogger guidelines introduced by advertising committee
F	Print newspapers still popular, but digital readership grows Figure 9: Readership of print and digital newspapers, Rol, 2012/13-2014/15
/	Ad agencies returning to newspaper advertising Figure 10: Advertising revenue generated by newspapers (print and digital), RoI, 2011-14
ſ	Mobile device ownership in Ireland continues to grow Figure 11: Consumers who own, or have access to, mobile technology devices, NI and RoI, July 2014-June 2015
ç	Second screening is a mainstream activity
/	Amazon and Chrome follow Firefox to block Flash
Mai	ket Size and Forecast
ł	Key points
,	Advertising market continues to grow in 2015 Figure 12: Estimated advertising revenues, IoI, NI and RoI, 2010-20
ł	Recovery in ad spending to be faster in RoI compared to NI Figure 13: Indexed estimated advertising revenues, NI and RoI, 2010-20
(Dnline the main driver of advertising expenditure Figure 14: Online advertising spend, Rol, 2009-18
ŝ	Significant increase in mobile ad spending in 2014 Figure 15: Breakdown of mobile advertising spend, RoI, 2013 and 2014
	though desktop still accounts for majority of digital adspend Figure 16: Breakdown of desktop advertising spend, RoI, 2013 and 2014
Str	engths and Weaknesses
ç	Strengths
١	Veaknesses
Cor	npanies and Innovations
ł	Key points
E	Examples of innovation

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Live-streamed pizza
Snap for ice cream
Print ad chills beer
Company profiles
An Post
Key facts
Recent developments
Carat Ireland
Key facts
Recent developments
Cawley NEA/TBWA
Key facts
Recent developments
Clear Channel Ireland
Key facts
Recent developments
Irish International
Key facts
Recent developments
JCDecaux Ireland
Key facts
Recent developments
LyleBailie International
Key facts
Recent developments
MEC Ireland
Key facts
Recent developments
Ogilvy & Mather
Key facts
Recent developments
Omnicom Group
Key facts
Recent developments
Owens DDB
Key facts
Recent developments
Publicis Dublin
Key facts

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recent developments Rothco Key facts Recent developments WPP Key facts Recent developments The Consumer – Effectiveness of Advertising Key points TV rated the most effective method of advertising Figure 17: How effective consumers find different methods of advertising to be (1 being the most effective and 5 being the least effective), NI and Rol, June 2015 NI men and RoI Boomers find TV advertising most effective Figure 18: Consumers who rated TV advertising as '1' (most effective), by gender and age, NI and RoI, June 2015 Sponsorship of TV shows effective at reaching Millennials and early Gen-Xers Figure 19: Consumers who rated sponsorship of TV shows as '1' (most effective), by gender and age, NI and RoI, June 2015 Billboards and outdoor posters effective in reaching city dwellers Figure 20: How effective consumers rate billboards/outdoor posters as '1' (most effective), by location, Rol, June 2015 The Consumer – Interaction with Advertising Key points Irish consumers agree that volume of advertising has increased Figure 21: Agreement with statements relating to advertising, NI and RoI, June 2015 NI women most receptive to advertising with special offers Figure 22: Agreement with statements relating to advertising, by gender and age, NI, June 2015 Late Gen-Xers in Rol think there is more advertising today compared to five years ago Figure 23: Agreement with statements relating to advertising, by gender and age, RoI, June 2015 NI Millennials most likely to feel misled by advertising Figure 24: Agreement with statements relating to advertising, by gender and age, NI, June 2015 Figure 25: Agreement with statements relating to advertising, by gender and age, Rol, June 2015 The Consumer – Attitudes towards Advertising Key points Consumers understand that advertising keeps some services free Figure 26: Agreement with statements relating to advertising, NI and RoI, June 2015 Millennials most annoyed by in-app advertising Figure 27: Agreement with statements relating to advertising, by age, NI, June 2015 Figure 28: Agreement with statements relating to advertising, by age, RoI, June 2015 Young consumers switching to other devices during TV ad breaks Figure 29: Agreement with statements relating to advertising, by gender and age, NI, June 2015

Figure 30: Agreement with statements relating to advertising, by gender and age, RoI, June 2015

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Young and old consumers prefer direct mail to be printed on recyclable materials

Figure 31: Agreement with statements relating to advertising, by gender and age, NI, June 2015

Figure 32: Agreement with statements relating to advertising, by gender and age, RoI, June 2015

Appendix

NI Toluna

111	
	Figure 33: How effective consumers rate TV advertising (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 34: How effective consumers rate sponsorship of TV shows (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 35: How effective consumers rate radio advertising (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 36: How effective consumers rate cinema advertising (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 37: How effective consumers rate newspaper/magazine advertising (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 38: How effective consumers rate advertising they receive in the mail (direct mail) (1 being the most effective and 5 being the least effective), by demographics, NI, June 2015
	Figure 39: How effective consumers rate smartphone/tablet in-app advertising (eg Candy Crush) (1 being the most effective and 5
	being the least effective), by demographics, NI, June 2015 Figure 40: How effective consumers rate advertising on a search engine (eg Google/Yahoo) (1 being the most effective and 5 being the least effective) by demographical NL events and 2015
	least effective), by demographics, NI, June 2015 Figure 41: How effective consumers rate display/banner advertisements on webpages (1 being the most effective and 5 being the least
	effective), by demographics, NI, June 2015 Figure 42: How effective consumers rate advertising on social network feeds (eg sponsored links on Facebook) (1 being the most
	effective and 5 being the least effective), by demographics, NI, June 2015 Figure 43: How effective consumers rate 'Liked' advertisements on social networks (eg when a friend has liked a company post/page)
	(1 being the most effective and 5 being the least effective), by demographics, NI, June 2015 Figure 44: How effective consumers rate billboards/outdoor posters (1 being the most effective and 5 being the least effective), by
	demographics, NI, June 2015 Figure 45: How effective consumers rate advertising on the side of buses/taxis (1 being the most effective and 5 being the least
	effective), by demographics, NI, June 2015 Figure 46: How effective consumers rate advertisements on internet media service (eg YouTube, Spotify) (1 being the most effective
	and 5 being the least effective), by demographics, NI, June 2015 Figure 47: How effective consumers rate augmented reality/NFC points/QR codes (eg interactive bus stops) (1 being the most effective
	and 5 being the least effective), by demographics, NI, June 2015 Figure 48: How effective consumers rate product placement (eg famous brands featured in a TV show/film) (1 being the most effective
	and 5 being the least effective), by demographics, NI, June 2015 Figure 49: Agreement with statements relating to advertising, by demographics, NI, June 2015
	Figure 50: Agreement with statements relating to advertising, by demographics, NI, June 2015 (continued)
	Figure 51: Agreement with statements relating to advertising, by demographics, NI, June 2015 (continued)
	Figure 52: Agreement with the statement 'Smartphone/tablet in-app adverts annoy me', by demographics, NI, June 2015
	Figure 53: Agreement with the statement 'I change the channel/radio station/my browser tab when advertisements start', by demographics, NI, June 2015
	Figure 54: Agreement with the statement 'I have had my name taken off mailing lists/databases', by demographics, NI, June 2015
	Figure 55: Agreement with the statement 'I think I bought a product/service in the last 12 months after it was endorsed/reviewed by a blogger/vlogger that I follow', by demographics, NI, June 2015
	Figure 56: Agreement with the statement 'I have been encouraged to buy products that have sponsored television programmes', by demographics, NI, June 2015
	Figure 57: Agreement with the statement 'I find online advertising to be more 'in your face' than offline advertising (eg expanding video banners)', by demographics, NI, June 2015
	Figure 58: Agreement with the statement 'Personalised advertising through the post is more likely to catch my attention than standard mail advertising', by demographics, NI, June 2015
	Figure 59: Agreement with the statement 'I understand that advertising is essential to keep some services free to use (eg Google, Facebook)', by demographics, NI, June 2015
	Figure 60: Agreement with the statement 'I prefer advertising sent through the post to be printed on recyclable materials', by demographics, NI, June 2015
	Figure 61: Agreement with the statement 'I switch to using other devices when ad breaks start on TV (eg smartphone/tablet)', by demographics, NI, June 2015
	Figure 62: Agreement with the statement 'I enjoy outdoor advertising that you can interact with using a smartphone/tablet (eg QR codes)', by demographics, NI, June 2015
	Figure 63: Agreement with the statement 'I think it should be illegal to 'touch up' images in advertising (ie Photoshopping images in fashion advertisements)', by demographics, NI, June 2015
Ro	I Toluna
	Figure 64: How effective consumers rate TV advertising (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015
	Figure 65: How effective consumers rate sponsorship of TV shows (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015

BUY THIS REPORT NOW

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300 APAC +61 (0) 2 8284 8100 | EMALL: reports@mintel.com



Report Price: £1095.00 | \$1773.30 | €1390.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 66: How effective consumers rate radio advertising (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015

Figure 67: How effective consumers rate cinema advertising (1 being the most effective and 5 being the least effective), by demographics, RoI, June 2015

Figure 68: How effective consumers rate newspaper/magazine advertising (1 being the most effective and 5 being the least effective),

by demographics, Rol, June 2015 Figure 69: How effective consumers rate advertising they receive in the mail (direct mail) (1 being the most effective and 5 being the

Figure 70: How effective), by demographics, Rol, June 2015 Figure 71: How effective), by demographics, Rol, June 2015 Figure 71: How effective consumers rate smartphone/tablet in-app advertising (eg Candy Crush) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 71: How effective consumers rate advertising on a search engine (eg Google/Yahoo) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 72: How effective consumers rate display/banner advertisements on webpages (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015

effective), by demographics, Rol, June 2015 Figure 73: How effective consumers rate advertising on social network feeds (eg sponsored links on Facebook) (1 being the most

Figure 73: How effective consumers rate advertising on social network feeds (eg sponsored links on Facebook) (T being the most effective and 5 being the least effective), by demographics, Rol, June 2015 (1 being the most effective consumers rate 'Liked' advertisements on social networks (eg when a friend has liked a company post/page) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 75: How effective consumers rate billboards/outdoor posters (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 75: How effective consumers rate advertising on the side of heavy (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015

Figure 76: How effective consumers rate advertising on the side of buses/taxis (1 being the most effective and 5 being the least effective), by demographics, RoI, June 2015 Figure 77: How effective consumers rate advertisements on internet media service (eg YouTube, Spotify) (1 being the most effective

and 5 being the least effective), by demographics, Rol, June 2015 Figure 78: How effective consumers rate augmented reality/NFC points/QR codes (eg interactive bus stops) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 79: How effective consumers rate product placement (eg famous brands featured in a TV show/film) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015 Figure 79: How effective consumers rate product placement (eg famous brands featured in a TV show/film) (1 being the most effective and 5 being the least effective), by demographics, Rol, June 2015

Figure 80: Agreement with statements relating to advertising, by demographics, Rol, June 2015

Figure 81: Agreement with statements relating to advertising, by demographics, Rol, June 2015 (continued)

Figure 82: Agreement with statements relating to advertising, by demographics, RoI, June 2015 (continued)

Figure 83: Agreement with the statement 'Smartphone/tablet in-app adverts annoy me', by demographics, RoI, June 2015

Figure 84: Agreement with the statement 'I change the channel/radio station/my browser tab when advertisements start', by

demographics, Rol, June 2015 Figure 85: Agreement with the statement 'I have had my name taken off mailing lists/databases', by demographics, Rol, June 2015

Figure 86: Agreement with the statement 'I think I bought a product/service in the last 12 months after it was endorsed/reviewed by a blogger/vlogger that I follow', by demographics, RoI, June 2015 Figure 87: Agreement with the statement 'I have been encouraged to buy products that have sponsored television programmes', by demographics, RoI, June 2015 Figure 88: Agreement with the statement 'I find online advertising to be more 'in your face' than offline advertising (eg expanding video banners)', by demographics, Pol, June 2015

video banners)', by demographics, RoI, June 2015 Figure 89: Agreement with the statement 'Personalised advertising through the post is more likely to catch my attention than standard

Figure 90: Agreement with the statement 'I understand that advertising through the post is more likely to catching attention than state Figure 90: Agreement with the statement 'I understand that advertising is essential to keep some services free to use (eg Google, Facebook)', by demographics, Rol, June 2015 Figure 91: Agreement with the statement 'I prefer advertising sent through the post to be printed on recyclable materials', by demographics, Rol, June 2015

Figure 92: Agreement with the statement 'I switch to using other devices when ad breaks start on TV (eg smartphone/tablet)', by demographics, RoI, June 2015 Figure 93: Agreement with the statement 'I enjoy outdoor advertising that you can interact with using a smartphone/tablet (eg QR

Figure 94: Agreement with the statement 'I think it should be illegal to 'touch up' images in advertising (ie Photoshopping images in fashion advertisements)', by demographics, Rol, June 2015

BUY THIS REPORT NOW

APAC +61 (0) 2 8284 8100