

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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



“Despite taking steps to avoid advertising, there is currently little appetite among Irish consumers to pay for a premium service to do so. This does not mean that consumers accept or are happy with the advertising experience that they receive. Instead, consumers may think that these services do not represent value for money.”

– James Wilson, Research Analyst

This report looks at the following areas:

- Ad-block software usage continues to increase
- Social media platforms remain a key advertising channel
- Newspaper ad revenues fall in 2016
- Device ownership remains at peak levels in Ireland

This Report examines the advertising industry in NI and RoI and includes an analysis of the main market drivers. For the purpose of this Report, the following definitions apply:

Advertising –

any paid form of non-personal presentation and promotion of ideas, goods or services by an identified sponsor.

Catch-up/on-demand services –

refers to television programmes digitally recorded using personal video recorder equipment to be watched by the user at a later date.

Digital/online advertising –

any form of advertising on the internet including display advertising, search advertising and mobile advertising.

Direct marketing –

direct mail, direct-response advertising and telemarketing.

Sponsorship –

financial or material support of an event, activity, person, organisation or product.

Commercial media –

these stations can be easily identified in that they broadcast advertisements. They are paid for predominantly by advertising. Major commercial TV stations include UTV, Channel 4, Channel 5 and Sky TV channels. RTÉ is both commercially and state-funded.

Non-commercial media

– these stations do not broadcast advertising and are funded by the state.

The BBC network of TV and radio is completely non-commercial.

**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

APAC
+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

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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

Table of Contents

Overview

What you need to know
Issues covered in this Report

Executive Summary

The market
Figure 1: Estimated advertising revenues, NI and RoI, 2012-22

Forecast
Figure 2: Indexed estimated advertising revenues, NI and RoI, 2012-22

Market factors
Ad-block software usage continues to increase
Social media platforms remain a key advertising channel
Newspaper ad revenues fall in 2016
Device ownership remains at peak levels in Ireland
Companies, brands and innovations

The consumer
Social media the most effective online advertising channel
Figure 3: How effective consumers find different online advertising methods, NI and RoI, June 2017

TV the most effective offline advertising channel
Figure 4: Offline advertising methods consumers consider effective (noticeable), NI and RoI, June 2017

Irish consumers taking steps to avoid advertising
Figure 5: Agreement with statements relating to advertising, NI and RoI, June 2017

Irish understand ads keep some services free to use
Figure 6: Agreement with statements relating to advertising, NI and RoI, June 2017

What we think

The Market – What You Need to Know

Advertising expenditure continues to grow in 2017
Usage of ad-blocking software remains high in RoI
Ad revenues at RoI newspapers fall in 2016
Multi-device ownership continues to be a challenge for advertisers

Market Size and Forecast

Advertising revenues to grow in 2017
Figure 7: Estimated advertising revenues, IoI, NI and RoI, 2012-22

All-Ireland adspend growth over next five years driven by RoI
Figure 8: Indexed estimated advertising revenues, NI and RoI, 2012-22

Strong growth in online advertising expenditure in 2016
Figure 9: Online advertising spend, RoI, 2009-16

**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
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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

Figure 10: Year-on-year percentage growth rates for digital advertising formats, RoI, 2015-16

Desktop spending continues to grow in 2016

Figure 11: Breakdown of desktop advertising spend, RoI, 2013-16

Search dominates spending but display grows twice as fast

Figure 12: Breakdown of mobile advertising spend, RoI, 2013-16

Figure 13: Mobile spending as a percentage of total online advertising expenditure, RoI, 2013-16

Market Drivers

Usage of ad-blocking software almost doubles in RoI

Figure 14: Devices using ad-block software on the open web, by country, December 2016

Figure 15: Internet users with ad-block software on their desktop computers, RoI, January 2016 and December 2016

Google to block annoying ads on Chrome

High device ownership positive for online advertising

Figure 16: Ownership of or access to mobile technology devices, NI and RoI, 2015-17

Newspapers see advertising revenues fall

Figure 17: Advertising revenue generated by newspapers (print and digital), RoI, 2011-16

Overall circulation declines, digital readership grows

Figure 18: Newspaper circulation, RoI, 2015 and 2016

Figure 19: Newspaper readership, RoI, 2012/13-2014/15

Social media remains an important channel for advertising

Figure 20: Top five social and media networks that consumers log on to regularly (ie log on at least once per week), NI and RoI, April 2017

Facebook metrics suffering errors

Figure 21: Facebook audience reach versus ONS population estimates in selected age groups, UK (including NI), March 2017

Gender stereotyping in advertising to be banned

GDPR less than a year away...

...and many firms are not ready for new regulations

Figure 22: Top three concerns marketers in the UK (including NI) have regarding the General Data Protection Regulation, February 2017

Companies and Brands – What You Need to Know

TBWA\Dublin looking beyond Ireland towards international accolades

Lyle Bailie International ceases trading

Omnicom consolidating its global network

WPP seeking to push boundaries beyond digital and into virtual

Who's Innovating?

Virtual Room by Unity

Facebook's Creative Hub

Google to adopt unskippable ads on YouTube

Competitive Strategies – Key Players

Company profiles

An Post

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

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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

Key facts
Recent developments
Carat Ireland
Key facts
Recent developments
TBWA\Dublin
Key facts
Recent developments
Clear Channel Ireland
Key facts
Recent developments
Irish International
Key facts
Recent developments
JCDecaux Ireland
Key facts
Recent developments
Omnicom Group
Key facts
Owens DDB
Key facts
Recent developments
Publicis Dublin
Key facts
Recent developments
Rothco
Key facts
Recent developments
WPP (including MEC Ireland and Ogilvy & Mather)
Key facts
Recent developments
MEC Ireland
Key facts
Recent developments
Ogilvy & Mather
Key facts
Recent developments

The Consumer – What You Need to Know

Social network ads gain Irish consumers' attention

**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
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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

TV remains the most effective advertising channel
Half of Irish consumers fast forward through TV ads
Majority of consumers think Photoshopping should be illegal

The Consumer – Effectiveness of Online Advertising

Social networks most effective online advertising channel

Figure 23: Online advertising methods consumers consider most effective (noticeable), NI and RoI, June 2017

Search and display ads resonate with Irish men

Figure 24: Consumers who think search and display advertising is effective (noticeable), by gender and social class, NI, June 2017

Figure 25: Consumers who think search and display advertising is effective (noticeable), by gender and social class, RoI, June 2017

Students receptive to advertising on internet services

Figure 26: Consumers who think advertising on internet media services (eg YouTube, Spotify) is effective (noticeable), by age, NI and RoI, June 2017

Social networks effective in reaching Irish Millennials

Figure 27: Consumers who think advertisements on social networks are effective (noticeable), by age, NI, June 2017

Figure 28: Consumers who think advertisements on social networks are effective (noticeable), by age, RoI, June 2017

The Consumer – Effectiveness of Offline Advertising

TV remains most effective offline advertising channel

Figure 29: Offline advertising methods consumers consider effective (noticeable), NI and RoI, June 2017

Over-45s in RoI most receptive to TV advertising

Figure 30: Consumers who think TV advertising is effective (noticeable), by age, NI and RoI, June 2017

Sponsorship of TV shows well received by Millennials

Figure 31: Consumers who think sponsorship of TV shows is effective (noticeable), by age, NI and RoI, June 2017

Outdoor billboards better at reaching urban consumers

Figure 32: Consumers who think billboards and outdoor posters are effective (noticeable), by location, NI, June 2017

Figure 33: Consumers who think billboards and outdoor posters are effective (noticeable), by location, RoI, June 2017

The Consumer – Interaction with Advertising

Irish consumers fast forwarding TV adverts

Figure 34: Agreement with statements relating to advertising, NI and RoI, June 2017

Early Gen-Xers fast forwarding through on-demand TV ads in NI

Figure 35: Agreement with the statement 'I fast forward through television adverts when using catch-up/on-demand services, by age, NI and RoI, June 2017

Parents of 5-15-year-olds looking for stronger restrictions for kids' ads

Figure 36: Agreement with the statement 'I think there should be stronger restrictions on advertising to children', by presence of children in the household, NI and RoI, June 2017

Humorous advertising appeals to women

Figure 37: Agreement with the statement 'I pay attention to advertising that makes me laugh', by gender and age, NI and RoI, June 2017

The Consumer – Attitudes towards Advertising

Consumers avoiding advertising but understand it keeps services free

Figure 38: Agreement with statements relating to advertising, NI and RoI, June 2017

Young and affluent consumers most likely to avoid advertising

Figure 39: Agreement with statements relating to advertising, by age, NI and RoI, June 2017

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

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Attitudes to Advertising - Ireland - August 2017

Report Price: £1095.00 | \$1417.92 | €1301.30

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

NI women most likely to think Photoshopping should be illegal

Figure 40: Agreement with the statement 'I think it should be illegal to 'touch up' images in advertising (ie Photoshopping images in fashion advertisements)', by gender, NI and RoI, June 2017

Men claim better understanding of 'cookies'

Figure 41: Agreement with the statement 'I understand how 'cookies' affect my online experience', by gender, NI and RoI, June 2017

Figure 42: Agreement with the statement 'I use ad-blocking software on my devices (eg smartphone)', by gender, NI and RoI, June 2017

Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Market size rationale

Generational cohort definitions

Abbreviations

**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

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com