

Report Price: £1095.00 | \$1478.58 | €1232.31

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



"There remains a high level of advertising avoidance as
Irish consumers continue to fast forward through TV
adverts when using catch-up and on-demand services, and
change channels and browser tabs when adverts start.
However, delivering humorous campaigns with special
offers will help brands to re-engage consumers."

- James Wilson, Research Analyst

This report looks at the following areas:

Advertising expenditure continues to grow across Ireland. This is being driven by online channels, with video-on-demand and native advertising seeing the largest increases in spending between 2016 and 2017. However, despite the significant increase in online advertising expenditure, TV advertising remains the most effective in gaining 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

+86 (21) 6032 7300

+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 | \$1478.58 | €1232.31

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, 2013-18

Forecast

Figure 2: Indexed estimated advertising revenues, NI and RoI, 2013-23

Market factors

Growing dislike for online advertising

Social media remains an important advertising channel

Consumers less confident in spotting advertising online

High device ownership a challenge for brands

Companies, brands and innovations

The consumer

Social networks remain effective in reaching Irish consumers online

 $\ \, \text{Figure 3: Online advertising methods consumers consider most effective (noticeable), NI and RoI, June 2018 } \\$

Advertising on live TV noticed by Irish consumers

Figure 4: Offline advertising methods consumers consider most effective (noticeable), NI and RoI, June 2018

Advertising avoidance remains high

Figure 5: Agreement with statements relating to advertising, NI and RoI, June 2018

Recyclable direct mail important to Irish consumers

Figure 6: Agreement with statements relating to advertising, NI and RoI, June 2018

What we think

The Market - What You Need to Know

Spending on advertising grows in 2017

RoI consumers think online ads are more intrusive than offline ads

Consumers less confident in recognising online ads

Cinema ads well received by RoI consumers

GDPR takes effect, and consumers are optimistic it will protect their data

Market Size and Forecast

2018 to see strong growth in advertising expenditure

Figure 7: Estimated advertising revenues, IoI, NI and RoI, 2013-23

RoI driving all-Ireland adspend over the next five years

Figure 8: Indexed estimated advertising revenues, NI and RoI, 2013-23

Online advertising continues to grow in RoI



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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Figure 9: Online advertising spend, RoI, 2009-17

Figure 10: Year-on-year percentage growth rates for digital advertising formats, RoI, 2016-17

Growth in desktop advertising expenditure remains strong

Figure 11: Breakdown of desktop advertising spend, RoI, 2013-17

Search continues to dominate mobile adspend

Figure 12: Breakdown of mobile advertising spend, RoI, 2013-17

Figure 13: Mobile spending as a percentage of total online advertising expenditure, RoI, 2013-17

Market Drivers

Significant increase in UK consumers disliking all online ads

Figure 14: Openness towards online advertising, UK (including NI), 2016 and 2017

Online advertising considered intrusive

Figure 15: Advertising consumers consider to be most intrusive, RoI, May 2018

Consumers taking steps to avoid advertising online

Figure 16: Steps taken by internet users to avoid online adverts, UK (including NI), 2016 and 2017

High device ownership provides opportunities for advertisers

Figure 17: Ownership of or access to mobile technology devices, NI and RoI, June 2017 and June 2018

Confidence in recognising online ads declines

Figure 18: Confidence in recognising online advertising, UK (including NI), 2015-17

Social networking sites important advertising channels

Figure 18: Top five social and media networks that consumers log on to regularly (ie log on at least once per week), NI and RoI, March 2018

New data protection laws introduced in the EU

Figure 19: How well Irish consumers think the General Data Protection Regulation will protect their personal data, NI and RoI, June 2018

Facebook and Google face first cases under new data laws

Health campaigners call for tighter rules for advertising to children

Advertising considered essential part of the cinema experience

Figure 20: Agreement with statements related to cinema advertising, RoI, May 2018

Companies and Brands - What You Need to Know

Bacardi creates interactive campaign on IGTV

New tool to measure influencer marketing campaigns

JCDecaux reduces its carbon footprint

New feature to improve advertising transparency on Facebook

Who's Innovating?

Buzzoole to measure influence on Instagram

TBWA\Dublin planning for data-driven future with DataLab

Bacardi uses new Instagram TV platform in latest campaign

Social networks enhance advertising transparency

Competitive Strategies - Key Players

An Post



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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Key facts

Recent development

BBDO Dublin

Key facts

Recent developments

Carat Ireland

Key facts

Recent developments

Clear Channel

Key facts

Recent developments

JCDecaux

Key facts

Recent developments

Ogilvy & Mather

Key facts

Recent developments

Omnicom Group

Key facts

Recent developments

Owens DDB

Key facts

Publicis Dublin

Key facts

Recent developments

Rothco

Key facts

Recent developments

TBWA\Dublin

Key facts

Recent developments

Wavemaker

Key facts

Recent developments

WPP

Key facts

Recent developments

The Consumer - What You Need to Know

Email campaigns effective in reaching Irish consumers

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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

TV advertising the most effective offline channel

Photoshopping in ads viewed negatively by Irish consumers

Consumers want direct mail to be recyclable

Effectiveness of Online Advertising

Social networks remain effective advertising platforms

Figure 21: Online advertising methods consumers consider most effective (noticeable), NI and RoI, June 2018

Women more receptive to ads in social media news feeds

Figure 22: Consumers who think advertising on social network feeds (eg sponsored links on Facebook) are effective (noticeable), by gender and age, NI and RoI, June 2018

Ads on internet media services effective in reaching younger consumers

Figure 23: Consumers who think advertisements on internet media service (eg YouTube, Spotify) are effective (noticeable), by age, NI and RoI, June 2018

Email ads effective in reaching older consumers

Figure 24: Consumers who think email (direct mail advertising) advertising is effective (noticeable), by age, NI and RoI, June 2018

Effectiveness of Offline Advertising

TV continues to catch consumers' attention

Figure 25: Offline advertising methods consumers consider most effective (noticeable), NI and RoI, June 2018

Boomers notice advertising on live TV

Figure 26: Consumers who think live TV advertising is effective (noticeable), by age, NI and RoI, June 2018

Less affluent consumers notice direct mail advertising

Figure 27: Consumers who think advertising they receive in the mail (direct mail) is effective (noticeable), by gender and social class, NI and RoI, June 2018

Billboard ads reaching affluent consumers

Figure 28: Consumers who think billboards and outdoor posters are effective (noticeable), by gender and social class, NI and RoI, June 2018

Rural consumers hearing radio ads

Figure 29: Consumers who think radio advertising is effective (noticeable), by location, NI, June 2018

Figure 30: Consumers who think radio advertising is effective (noticeable), by location, RoI, June 2018

Interaction with Advertising

Irish consumers continue avoiding ads

Figure 32: Agreement with statements relating to advertising, NI and RoI, June 2018

Advertising that entertains appeals to parents

Figure 31: Agreement with the statement 'I pay attention to advertising that makes me laugh', by presence of children in the household, NI and RoI, June 2018

Women more likely to think 'Photoshopping' in ads should be banned

Figure 32: 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 2018

Ads inspire younger consumers to buy new products

Figure 33: Agreement with the statement 'An advertisement has inspired me to buy a new product or service in the last month', by age, NI and RoI, June 2018

Attitudes towards Advertising

Consumers think paper-based advertising should be recyclable

Figure 34: Agreement with statements relating to advertising, NI and RoI, June 2018

Greater restrictions on advertising appeal to women

Figure 35: Agreement with the statement 'There should be greater restrictions on advertising some products (ie alcohol, tobacco etc)', by gender and social class, NI and RoI, June 2018

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



Report Price: £1095.00 | \$1478.58 | €1232.31

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

Personalised mail can gain Gen-Xers' attention

Figure 36: Agreement with the statement 'Personalised advertising through the post is more likely to catch my attention than standard mail advertising', by age, NI and RoI, June 2018

Older consumers want more information on 'cookies'

Figure 37: Agreement with the statement 'There should be more information on how 'cookies' affect my online experience', by age, NI

and RoI, June 2018
Figure 38: Agreement with the statement 'There should be more transparency on the information collected by companies and passed on to advertisers', by age, NI and RoI, June 2018

Appendix - Data Sources, Abbreviations and Supporting Information

Data sources

Market size rationale

Generational cohort definitions

Abbreviations

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