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Media Analysis Report  
Executive Summary

# Election 2007 Analysis

Time Frame: Sept '06 - 23rd May '07

## About this Analysis

*This analysis provides an evaluation of the six major parties involved in the Irish election May 2007 – Fianna Fail, Fine Gael, Labour, Progressive Democrats (PD's), The Green Party and Sinn Fein. There are three distinct areas of analysis addressed in this evaluation.*

*Firstly, a quantitative evaluation of the Share of Voice for each major party was conducted against the corresponding polling points run by the published SBP/Red C poll. These were September '06 through November '06 and January '07 through May '07 – note that May polls were done weekly for the first three weeks of May.*

*Secondly, a quantitative evaluation of the Share of Voice for the leader of each major party was conducted against the corresponding polling points run by the published Irish Times TNS/MRBI leader satisfaction poll. These were January, April and week two and three in the month of May.*

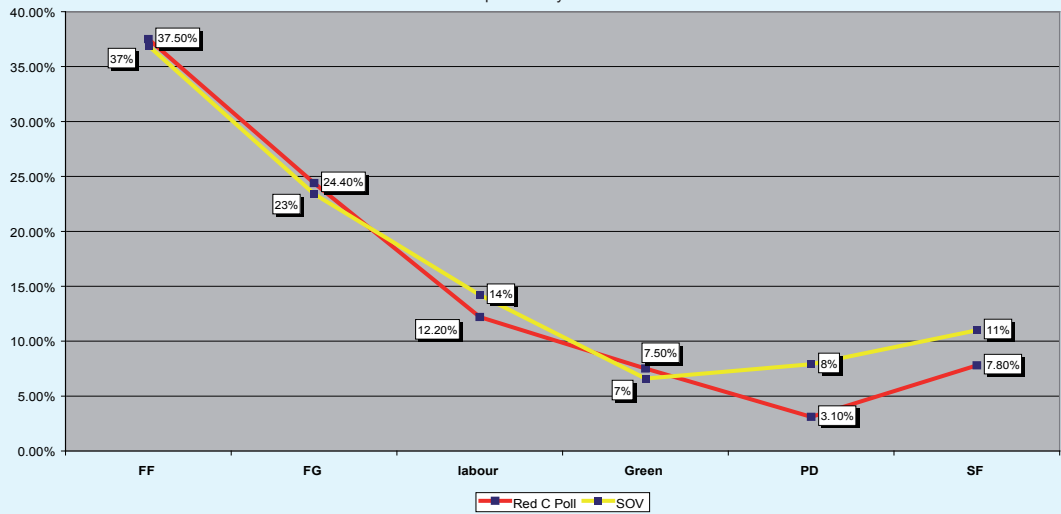
*Lastly, a qualitative analysis of all press coverage in the ROI national daily papers relating to the six parties was carried out to establish media performance on the last day before polling – 23rd May '07. This analysis produced Key Performance indicators that could be compared and contrasted across all political parties.*

## Party Share of Voice Analysis Headline Findings

- The PD's are 'punching above their weight' in terms of Share of Voice. It generated a far higher SoV percentage than satisfaction rating in the polls
- Sinn Fein and the Green Party showed the largest increases in weighted coverage in the months leading up to the election, eating into Fianna Fail's SoV
- Fine Gael and Labour's Share of Voice remained steady throughout the nine month analysis period

Averaged SOV against Averaged Red C Poll

Sep '06 - May '07



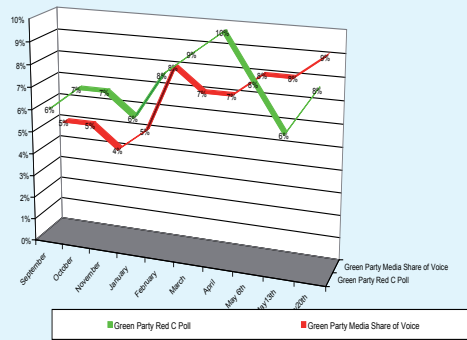
## Political Party Share of Voice

MediaMarket's nine month analysis of Political Party Share of Voice when compared to the RED C opinion poll uncovered that four of the six parties Share of Voice corresponds almost exactly with their polling result. Both Fianna Fáil and Fine Gael's share of weighted coverage correlated precisely with their polling positions. The Labour party figures show a slight differentiation, however the two parties which stand out in this analysis are the PD's and Sinn Fein.

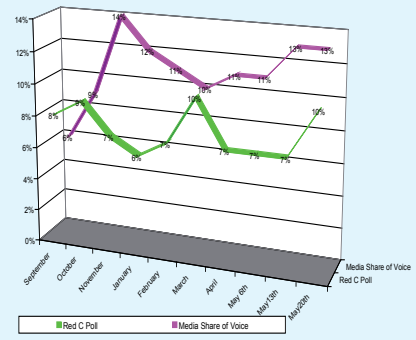
The PD'S stood out in particular in this analysis as punching well above their weight. It's Share of Voice was almost double that of its ratings in the opinion polls.

Sinn Féin's Share of Voice figure also surpassed its poll result, highlighting the fact that it has been successful during the 2007 election campaign in getting its brand into the newspapers.

Green Party Share of Media Voice VS Red C Opinion Polls



Sinn Fein Share of Media Voice VS Red C Opinion Polls



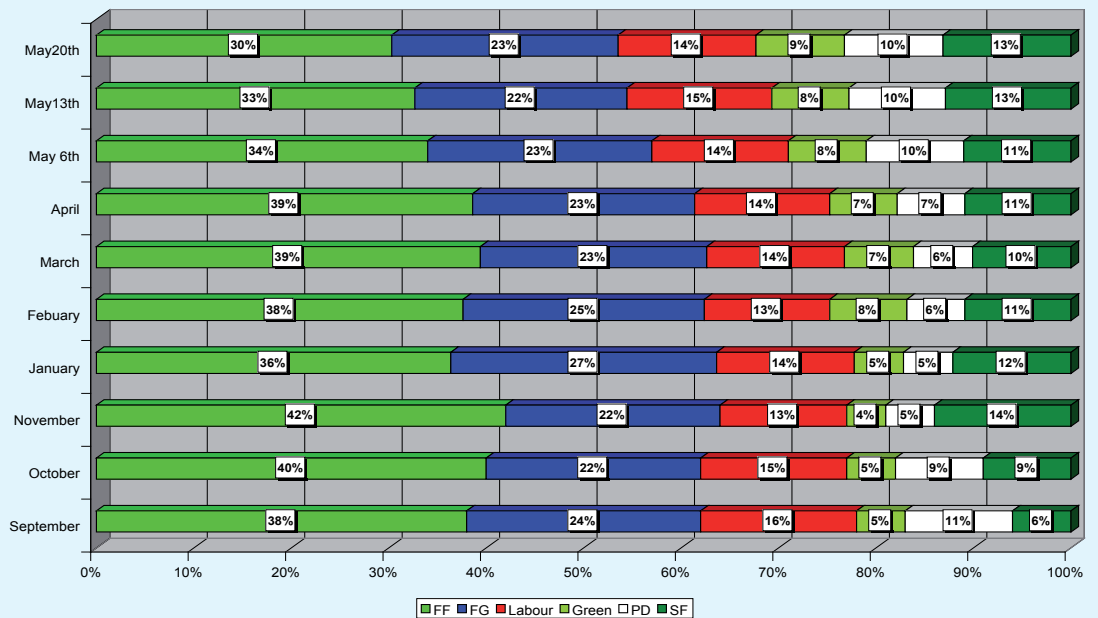
### Green Party Results

The Green Party's Share of Voice as well as its position in the polls improves substantially during the analysis period. Starting from 5% SoV and 6% Poll and reaching 8% and 9% respectively at the end of the campaign, it is likely that this boost should lead to a jump in votes for the Greens.

### Sinn Fein Results

Sinn Féin was also successful in boosting its SoV. During the analysis period Share of Voice more than doubled, jumping from 6% to 13%. Meanwhile its rating in the polls increased from 8% in September to 10% on the 20th of May, at the end of the campaign.

Overall Political Party Share of Voice



### Overall Political Party Share of Voice

Overall the Green Party and Sinn Fein saw their Share of Voice figures rise significantly during the analysis period. Fianna Fáil's Share of Voice fluctuated throughout the period, with a high of 42% in November. However, during the campaign season its share fell while the Green's and Sinn Fein's weighted coverage increased.

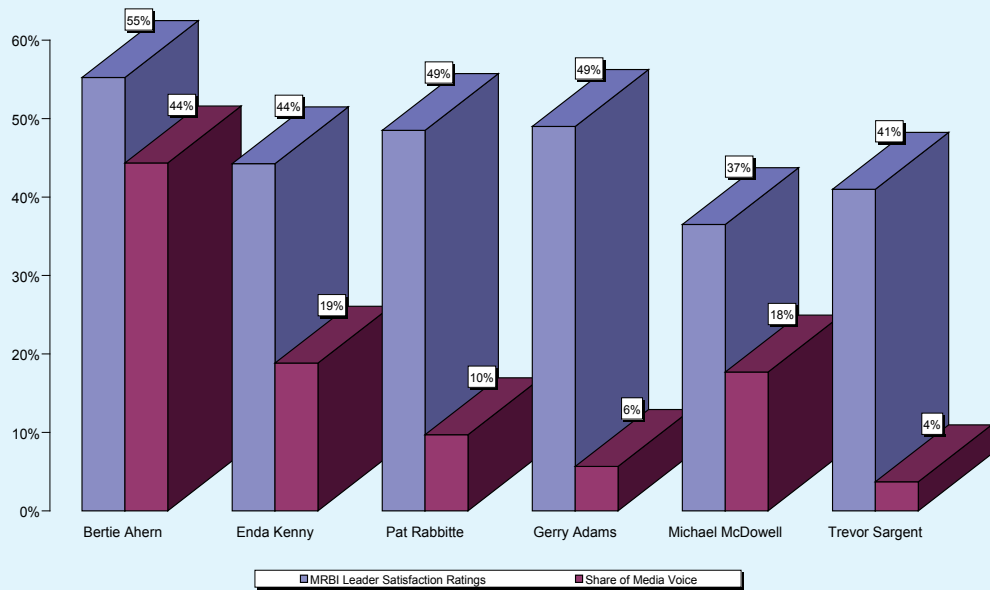
Fine Gael's share remained quite stable throughout the period as did the Labour party's. The PD's started the period with a strong figure, this however fell quite severely mid-analysis and recovered again, during the three weeks of the election campaign.

## Party Leader Share of Voice Headline Findings

- Bertie Ahern has the largest Share of Voice as well as the strongest poll satisfaction rating when compared to all other leaders

- Enda Kenny and Pat Rabbitte's SoV both ate into An Taoiseach's dominant share in the lead up to the election
- With the exception of Bertie Ahern there was little correlation between the leader's Share of Voice and poll satisfaction ratings

### Party Leader: Share of Media Voice Vs. MRBI Leader Satisfaction Ratings

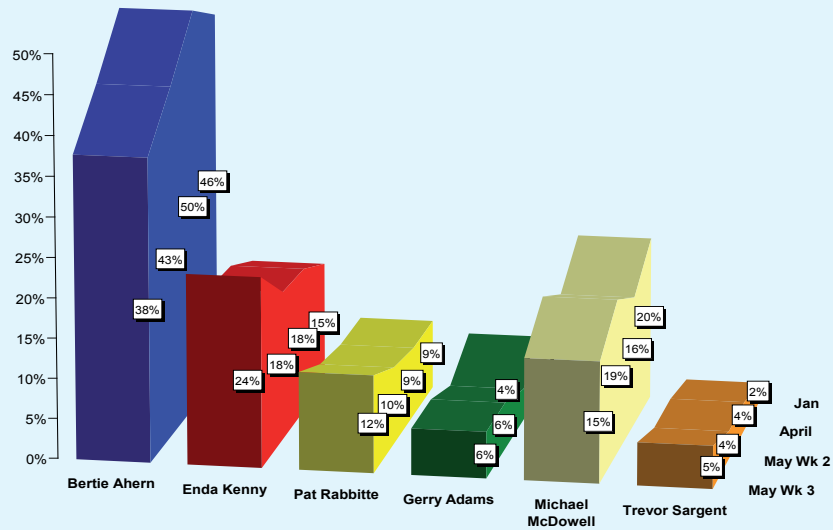


### Overall Party Leader Share of Voice v Satisfaction Rating

The Election analysis uncovered that, with the exception of Bertie Ahern, there was little correlation between averaged party leader Share of Voice and Poll results. Michael McDowell generated an impressive amount of coverage considering the size of his party, almost

equal to opposition leader Enda Kenny. This however could be explained by his position as Government Tanaiste. His Share of Voice figure was 8%, higher than his party's average SoV suggesting that the majority of the PD's coverage is driven by it's leader.

### Party Leader: Trending Share of Media Voice Jan - May '07



### Overall Party Leader Share of Voice

Share of Voice figures uncovered that Bertie Ahern's share of voice increased at the beginning of the analysis period, but dropped off toward the end of the campaign.

This share was taken mainly by Enda Kenny and Pat Rabbitte, who saw their SOV steadily increase across the period. Trevor Sargent also improved his position in the newspapers, improving his SOV from 2% to 5%.



### Michael McDowell & Gerry Adams Results

Although there is a gap between Share of Voice figures and poll results, in-depth study into Michael McDowell's and Gerry Adams' Share of Voice figures shows that in almost all circumstances an increase in

weighted coverage led to an increase in satisfaction ratings.

## Floating Voter Analysis Headline Findings

- The Irish Independent and the Irish Times both came down on the side of Fine Gael when reporting on the day's issues.
- Fianna Fail generated the highest volume of coverage, however a large amount of this coverage was Negative and it had the highest Prime Negative rating
- The Green Party and Fine Gael ended the election campaign on a high note with the strongest Media Performance Index's; 55/100 and 45/100 respectively.
- The PD's and Sinn Fein received the most negative coverage on the final day of the campaign with 57% and 47% of their coverage ranking as Negative in ton

## Floating Voter Analysis Management Précis

MediaMarket's qualitative analysis of the national newspapers published on 23rd May, 2007 revealed that Fine Gael and the Green Party were the most successful parties to get positive messages across on the last day before the voter had to make a decision on the next Government. Although Fine Gael's volume was lower than Fianna Fáil's, the majority of its coverage was Positive while Fianna Fáil experienced a large amount of Negative treatment.

The main issue driving political coverage on the day was health, and Enda Kenny made the most of Fianna Fáil's cost confusions over co-location plans. Both Fine Gael and Labour grabbed the issue, stating that the 'superclinics' could cost the taxpayers upwards of 500 million euros over the next seven years. Also in the area of health, Fianna Fail were again in hot water over the leaking of a HSE memo that said 1,000 staff would be axed. The Labour party jumped on this issue with its leader Pat Rabbitte claiming that the last thing the health service needed was cut backs.

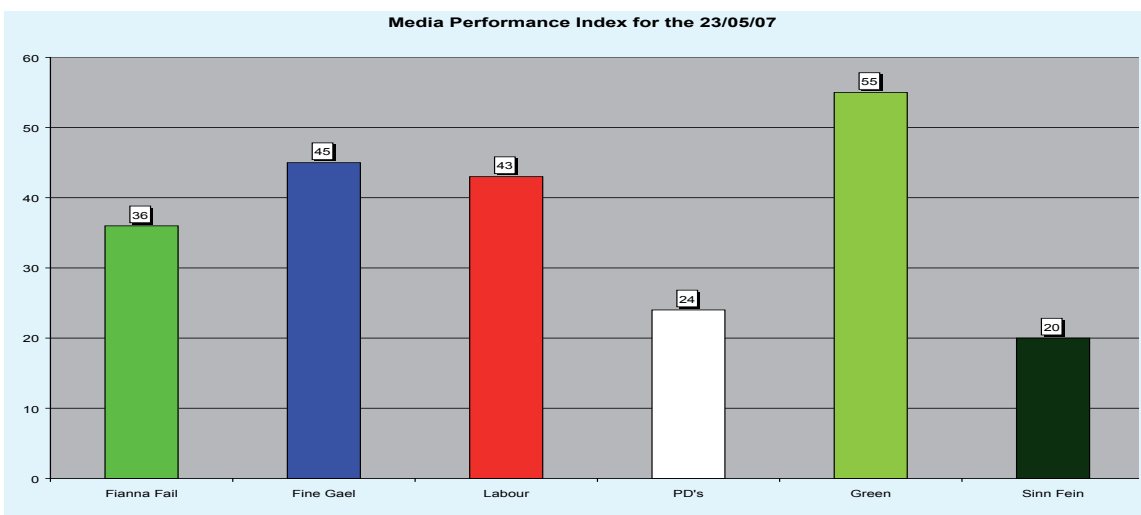
The other big issue in the papers was the question of whether Fianna Fail would coalesce with Sinn Fein. While Bertie Ahern and a number of ministers were quoted on ruling out this option, the opposition won the most column inches by claiming

that it was a possible option for Fianna Fáil. Enda Kenny warned that a vote for Fianna Fail was a vote for Sinn Fein and while some journalists did point out that he was attempting to scare the electorate, his point was made clearly.

Meanwhile, on a positive note for Fianna Fail tabloid papers picked up on a TV3's interview with Bertie Ahern. Pieces on the Taoiseach's love for the BeeGee's, football and articles on his love life added to his 'man of the people' persona, boosting his reputation.

The usual pre-election discussions on seat gains and losses drove Positive coverage for Fine Gael and the Green Party as it was predicted that they would both gain considerably. Fianna Fail and the PD's did not fare so well however, with predictions of seat losses and many pieces forecasting that Michael McDowell would lose his seat in south Dublin.

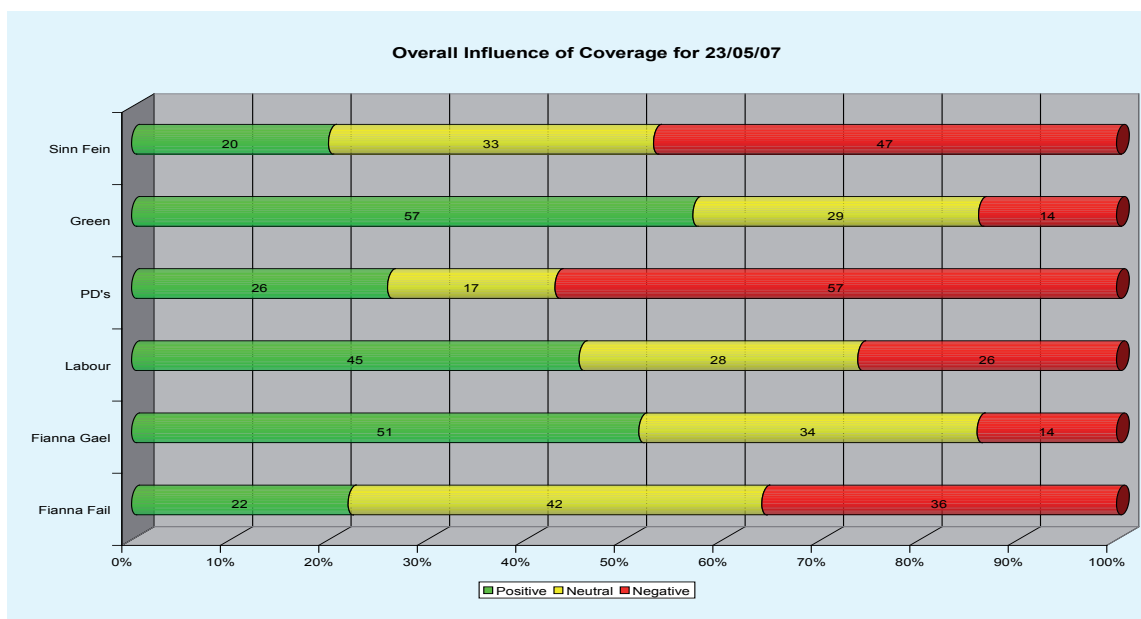
Reports on the IrishJobs.ie 29th Dail survey generated Positive column inches for Bertie Ahern as participants voted him as the politician who had done the best in the last Dáil. It meant more negative coverage for Michael McDowell however, who was voted as the second worst politician while his colleague Mary Harney was chosen as the worst Minister.



### Media Performance Index

As Media Performance Index is based on the impact of the coverage and does not take into account the volume, the Green Party were the clear winners as far as Media Performance was concerned with a strong 55/100 score. Fine Gael were in second place closely followed by the Labour party with 45/100 and 43/100 respectively.

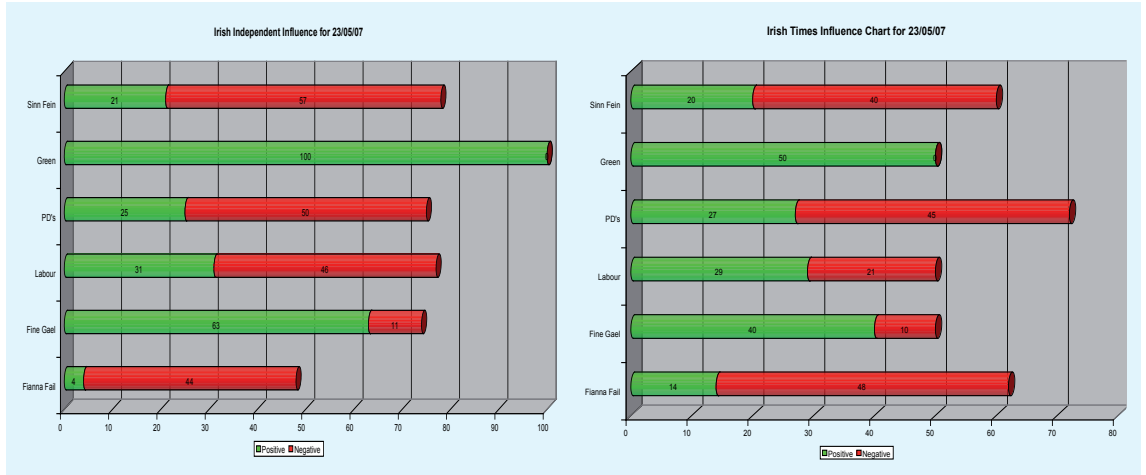
This would suggest that the alternative Fine Gael/ Labour/ Green coalition were most successful in getting their message across before polling day. Fianna Fail's media performance was low at 36/100 due to its high Prime Negative coverage while the PD's and Sinn Fein fared the worst.



### Overall Influence

The Green Party and Fine Gael enjoyed the most Positive overall coverage by far across all newspapers with 57% and 51% respectively. Their Negative coverage was also the lowest of all parties both registering at 14%. On the other end of the scale the PD'S, Sinn Fein and Fianna Fail all received largely Negative press. The PD's fared particularly poorly with 57% of all of their coverage being Negative in

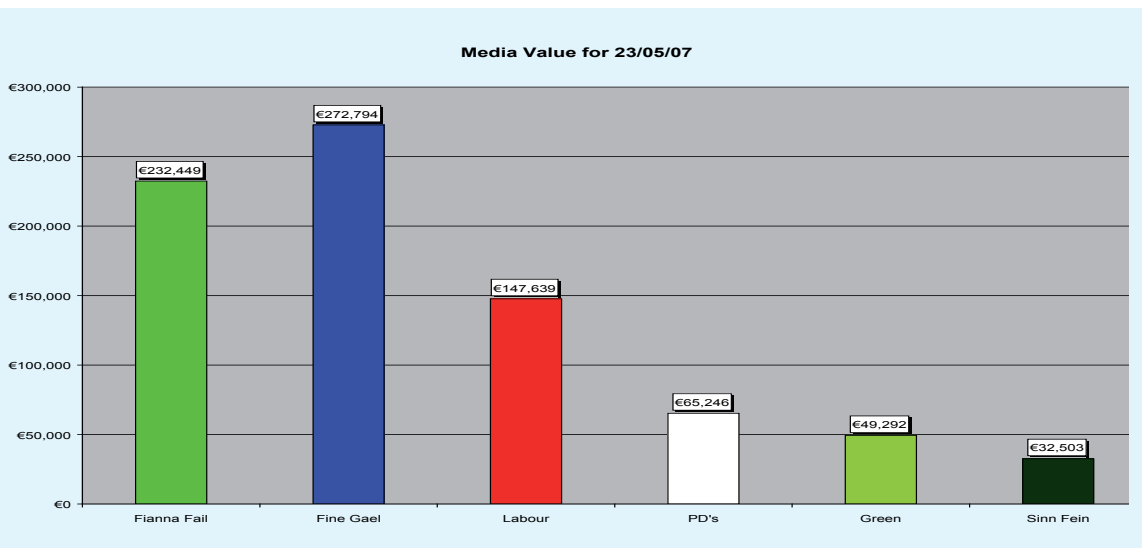
tone. 42% of Fianna Fail's coverage was Neutral, which suggests that although they may be put under pressure by the opposition and journalists in the media they are successful in responding and rebutting criticism. The PD's low 17% Neutral coverage would suggest that they are not so strong at counteracting bad press.



### Irish Independent & Irish Times breakdown

A breakdown of impact and influence according to publication type shows that the Irish Times and the Irish Independent came down on the side of Fine Gael in the last day of election print coverage. 63% of the Irish Independent's coverage on Fine Gael was Positive while only 4% was Positive towards Fianna Fail. 40% of the Irish Times' articles showed Fine Gael in a Positive light while 14% of its coverage promoted Fianna Fáil.

It should be noted that here was only one article on the Greens in the Irish Independent, which was Positive. In the Irish Times the Greens had 6 pieces of coverage of which half was neutral and half positive. The majority of Sinn Fein's coverage in both the Irish Times and the Irish Independent was Negative in tone. The Labour party coverage was quite balanced in both newspapers, although the Irish Times carried less Negative pieces. The PD's suffered almost 50% Negative coverage from both titles.



### PR Value

Despite the fact that Fianna Fail generated the most weighted coverage, it was Fine Gael whose coverage created the largest PR value for the day due to its high Positive content. Fianna Fail's PR value was second highest, driven by its strong weight.

The Green party did not continue their strong performance in this area as their volume and weight of coverage was comparably much lower than the other parties. The PD's and Sinn Fein once again came in at the bottom of the table due to high volumes of Negative coverage.

Fianna Fáil Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/ 100
	104	30,136	232,449	22	17	36	15	36/100

### Fianna Fáil Breakdown

- Fianna Fail's Media Performance Index came in at a low 36/100 driven by it high percentage of Prime Negative coverage. However, it must be pointed out that it's percentage of Prime Positive coverage was higher than Prime Negative. If this were not the case the Media Performance Index would have been even lower
- Fianna Fáil created the highest volume and weight of coverage, however, as a good deal of this coverage was Negative in tone, it's PR value was lower than Fine Gael's even though it generated less column inches
- Health issues drove Negative coverage for Fianna Fáil with all papers reporting on confusion over co-location costings combined with a significant amount of interest in the leaking of a HSE memo that said 1,000 staff would be let go
- Speculation over Fianna Fail's intentions to join with Sinn Fein in creating the next Government also created Negative press for the party, despite the Taoiseach's protests to the contrary
- Bertie Ahern's popularity drove the majority of Positive coverage for the party with articles on his love life, musical taste and sporting passions. His nomination as the politician who done the best job in the 29th Dail in the irishjobs.ie survey also generated Positive column inches for the party

Fine Gael Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/ 100
	76	26,810	272,794	51	12	14	4	45/100

### Fine Gael Breakdown

- Despite the fact that it generated less press than Fianna Fail, Fine Gael was the clear winner as far as Media Performance was concerned on the final day of press before the election
- Strong Prime Positive and low Prime Negative coverage meant that its Media Performance Index came in at a strong 45/100
- While its weighted coverage was lower than Fianna Fáil's it was more Positive, thus generating a higher PR value for the coverage at over a quarter of a million Euros for the day
- Fine Gael's criticisms of Fianna Fáil's cost confusion over co-location drove Positive coverage for Fine Gael
- Enda Kenny was also very successful in getting the message across in the media that a vote for Fianna Fáil may mean a vote for Sinn Féin
- There was particular interest in the FG candidate Lucinda Creighton who, if elected, will not only become the youngest member of the Dáil at 27 years of age but could also take Michael McDowell's seat
- Negative coverage was driven by protesters who gathered outside Fine Gael HQ demanding to know Enda Kenny's stance on the M3/Tara motorway

Labour Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/ 100
	53	17,408	147,639	45	13	26	6	43/100

### Labour Breakdown

- The Labour party was very successful in getting its message across in the media and achieved a strong Media Performance Index of 43/100 driven by high Prime Positive figures and low Prime Negative pieces
- The PR value was respectable at €147,639 boosted by the high percentage of Positive coverage. However, if it were not for the large percentage of Negative coverage this figure would have been higher
- Like Fine Gael, Labour generated Positive coverage for itself by berating Fianna Fail's latest health issue debacle. They also created Positive media interest with their policy on suicide prevention
- Negative coverage was generated for the party by questions surrounding Pat Rabbitte's future coalition intentions. As Paddy Power switched its odds from a Fine Gael/Labour/Green Government to a Fianna Fail/ Labour one being the most likely future powers the papers questioned the strength of Pat Rabbitte's allegiance to Fine Gael. Foreign Affairs Minister Dermot Ahern twisted the knife even further when he called for 'disaffected' labour voters to transfer their vote to Fianna Fail to ensure their values are looked after

PD's Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/ 100
	47	11,934	65,246	26	4	57	14	24/100

### PD's Breakdown

- The PD's were not successful in getting their message to resonate with voters on the last day of the campaign. Volumes were low whilst coverage was Negative
- The PD's Media Performance Index was one of the lowest at 24/100 driven by low Prime Positive and high Prime Negative coverage
- The PD's PR value also reflects its poor performance as Negative coverage drained the value
- Speculation of the likelihood of Michael McDowell losing his seat drove Negative press
- The Irishjobs.ie poll, which discovered that McDowell was the 2nd favourite politician and Mary Harney was the 'worst minister', did not help in reports of the survey
- The PD's support of co-location meant that they also felt the wrath of Fine Gael and Labour, generating Negative press
- Protestors who marched outside Minister McDowell's office demanding that St. Lukes hospital is saved also created Negative press for the PD's
- Michael McDowell was successful in warning the electorate of the dangers of Sinn Fein in Government, generating much needed Positive column inches for the party
- News of Minister McDowell's plans to reform the assessment of legal costs also generated Positive media interest

Green Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/100
	14	4,994	42,292	57	21	14	0	55/100

### The Green Party Breakdown

- The Green Party was extremely successful in getting its message across on the last day of their election campaign. They enjoyed the highest Media Performance Index, generated by strong Prime Positive coverage combined with no Prime Negative pieces
- Although their volume of weighted coverage was low, the Green Party’s coverage created a strong PR value, driven by very Positive tonality
- Two articles covered John Gormley’s comments on the party’s election campaign which he stated was the most successful to date, driving Positive coverage
- The Irish Times ran a piece on the Green Party’s view on corporate donations, where the party came down strongly, demanding that all corporate donations be banned
- The Green Party experienced some Passing Negative coverage when it was mentioned as being part of the Fine Gael/Labour/Green coalition, who’s chances of forming the next government had decreased according to Paddy Power

Sinn Fein Metric Findings								
	Volume Articles	Weight Sq Cm	M*AVE €	Pos. %	Prime Pos. %	Neg. %	Prime. Neg. %	MPI/100
	49	15,090	32,509	20	6	47	14	20/100

### Sinn Féin Breakdown

- The last day of the election campaign was a poor one for Sinn Fein who’s low Prime Positive and high Prime Negative coverage meant that its Media Performance Index was the lowest of all parties, at an abysmal 20/100
- Although its volume and weight was higher than that of other small political parties it PR value was the lowest recorded, due to almost half of its press being Negative in tone.
- Almost all of the Negative coverage was driven by Fianna Fail’s statements that it would not go into Government with Sinn Fein. In conjunction with this Fine Gael, Labour and the PD’s all made reference to the point that if Sinn Féin were to play a role in forming the next Government, it would be a negative outcome
- Sinn Féin’s policies were also attacked. The Irish Independent claimed that they were ‘too radical’ while the Irish Examiner said of the party’s manifesto; “No wonder FF & FG use words like ‘extra-ordinary’, ‘crazy’ and ‘delusional’ to describe this weird document”.
- Positive coverage was driven by Brain Cowen and Dermot Ahern’s admission that Fianna Fáil would accept Sinn Fein support in order to form a minority Government
- Passing references to the likelihood of Mary Lou McDonald taking the second Fianna Fail seat in Dublin Central also generated Positive column inches

## Metric Definitions / Glossary of Terms

**Volume of Coverage** is the total amount of coverage by month, campaign, message etc. denoted in number of articles.

**Weight of Coverage** is the total amount of coverage by month, campaign, message etc. denoted by Sq. CM of exposure.

Profile of Coverage is an analysis of the volume of coverage by weight across:

- The publication types
- National Daily
- National Sunday
- Regional
- Magazines
- The individual publications and supplements to main publications.

**Impact** scores a relevant article in terms of its placement / positioning of input, comments, key messages from a specific party or interest group and is categorised as 'prime', 'significant' or 'passing'. Each piece of editorial is given an Impact score.

**Influence** is defined as the editorial favourability / tonality of the relevant piece and is categorised as 'positive', 'neutral' or 'negative'. Each piece of editorial is given an Influence score.

**Impact & Influence Tracker** is a storyboarding of the key events by week for each of the analysed stakeholders during the analysis period, highlighting the major stories contributing to its performance scores. It works by mapping two qualitative metrics onto a line graph: the 'Impact' and 'Influence' metrics, with each score totalled by week. This allows you to visually see a snapshot of:

- Cumulative 'Impact' scores by week trended over time
- Cumulative Influence scores by week trended over time
- Key client events, announcements, press releases, issues mapped onto the chart.

**Media Impact Rating** is an absolute rating taking into account the volume of coverage as well as its relative Impact and Influence scores. It works by giving each article a MIR (Media Impact Rating), which is based on a 9-point 'Impact' & 'Influence' scale. It thus provides a MIR for each piece of coverage and a total MIR per month, campaign, message, competitor etc.

**Media Performance Index** is an overall score of a competitor's / stake holder's qualitative media performance. It is calculated based on Impact / Message delivery and Influence/ Favourability of coverage, and is an index out of 100 (i.e. a minimum of 0 and a maximum of 100). The difference between this index and the MIR is that the Index does not consider the volume or weight of coverage in its calculation.

**Brand Equity Rating** is an absolute rating taking into account the volume of coverage as well as its relative Impact and Influence scores. It works by giving each article a BER (Brand Equity Rating), which is based

on a 9-point 'Impact' & 'Influence' scale similar to the MIR, except that it applies negative values to coverage, thus calculating a draining of brand equity.

**Target Audience** can be defined as those who one aims to reach with a communication. Typical target audiences include

- All Adults AND/OR 'Demographic such as Age, Sex or Social Class'

**Target Audience Reach** is the total net audience reach of a campaign / message expressed in '000's and percentages.

**Target Audience Frequency** is the number of times someone in your target audience has been exposed to your messages / PR. It is usually expressed as an average'.

**Gross Rating Point** (GRP) defines audience exposure against the population of a defined audience. One GRP equates to audience exposure among one percent of the target audience. GRP includes duplicated reach and can be calculated as Audience Reach \* Frequency.

**Effective Frequency** is the number of times someone in your target audience has been exposed to your messages / PR a minimum number of times. It is expressed at various levels such as 1+, 2+, 3+, 4+.

**Gross Impressions** is the total duplicated reach of a campaign / message expressed in '000's. As it includes duplicates (the same person maybe several times), the number is often large and significantly greater than the total population of the audience in question.

**OTS** stands for 'Opportunities to See' and has exactly the same meaning as 'Gross Impressions'.

**Share of Voice** is the share of the total coverage received for each of the analysed competitors / stakeholders / brands or products. It is calculated using weight of coverage.

**AVE** stands for Advertising Value Equivalent and is the equivalent cost of buying space devoted to editorial content.

**M-AVE** is a media value figure derived from applying a multiplier to the AVE based on the assigned 'Impact' and 'Influence' attributes of the coverage.

**Advertorial** is defined as space bought by an advertiser that includes copy intended to make the reader think it originates from an independent source.

**Circulation** is the number of copies of a publication distributed.



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