



Media Analysis Case Study

of

RIP-OFF IRELAND

**PRII Annual Conference:
Challenging Times, Changing Responses**

April 25, 2006

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1.0 Preface

For the past number of years the issue of ‘Rip-Off’ has been hanging over Ireland like a pall. The allegation has permeated every corner of the country and pervaded every industry, every institution, and every social group. In short, it is clinging all over the fabric that is *Ireland Inc.* For the purpose of this analysis, *Ireland Inc.* is defined as the conglomerate of all the corporate, institutional, social and political groups of Ireland. But just how has the media’s coverage of the Rip-Off issue impacted *Ireland Inc.* and its reputation? For the PRII Annual Conference: Challenging Times, Changing Responses, April 2005, MediaMarket conducted a complete analysis of the coverage, applying its Media Analysis metrics, to determine exactly how this issue is perceived in the National Press and subsequently evaluate how it has impacted *Ireland Inc.* and a number of its key sector’s reputations.

This report was not commissioned by any third party and was carried out exclusively for delegates at the PRII Conference, of which MediaMarket is title sponsor. MediaMarket is a member of the Association of Media Evaluation Companies (AMEC) and all work carried out by MediaMarket adheres to standards laid out in AMEC’s Quality Assurance Code. For more information about AMEC, please visit www.amecorg.com.

2.0 Research Objectives

- Analyse the ‘Rip-Off’ issue in the context of ‘Ireland’ and/or ‘Republic’ in the National Press over a defined time period.
- Evaluate the effect that the ‘Rip-Off Ireland/ Republic’ media coverage had on *Ireland Inc.*’s reputation.
- Analyse the media coverage of the key Industrial and Social sectors of *Ireland Inc.*, to show how their media performance effected both their own and *Ireland Inc.*’s reputation.

3.0 Strategy

The strategy adopted by MediaMarket was two-fold. Firstly, it involved a quantitative evaluation of the press coverage over a three-year timeframe and then a more focused qualitative analysis of the coverage over a four-month period.

The quantitative evaluation researched all national press coverage of the ‘Rip-Off’ issue in the context of ‘Ireland’ and/or ‘Republic’ from: January 1, 2003 – December 31, 2005 to ascertain the total volume, weight and profile of media coverage.

The qualitative analysis focussed on the intense media reporting coverage immediately following Eddie Hobbs ‘Rip Off Republic’ TV show, from September 1, 2005 – December 31, 2005. It also separated the key industrial and social sectors and analysed the impact and influence of the media coverage of each from the viewpoint of *Ireland Inc.*

4.0 Executive Summary

An analysis of the media coverage revealed that *Ireland Inc.* is being seriously damaged by the storm of allegations that everyone is being ripped-off in Ireland. After years of ever-increasing public annoyance and resentment over rising costs and high prices, this looming cloud of public anger was looking to vent. Political Parties, consumer groups and various media had all tried to channel this maelstrom of discontent. But it wasn't until the Eddie Hobbs' Rip-Off Republic RTE series, in the summer of 2005, that the issue was finally crystallized into stark simple terms that the public and other media could readily seize - and seize they did. Nearly everything and everyone was caught up in the ensuing storm and nothing was immune from the raging Rip-Off tempest. *Ireland Inc.* was being ravaged from within. The pent-up fury of the media, public and politicians was finally released. Everything from big business to the black market, from psychics to priests, from political polls to pole dancers, from Santa Claus to Eddie Hobbs and politicians of every stripe were affected. Even the general public were accused of being complicit in creating the Rip-Off Republic. The final result was that many sectors of Irish society suffered from negative media coverage and that in turn ultimately damaged *Ireland Inc.*'s reputation. Reputations are very valuable but highly vulnerable assets. It takes a long time to build one up, but they can be bruised very quickly. This level of negative coverage would ordinarily be enough to send any corporation into serious damage control.

The key findings of the report showed that:

- *Ireland Inc.* registered a devastating **minus 1,364** on the **Corporate Reputation Indicator**
- **Retail** had the lowest sector reading on the **Corporate Reputation Indicator** at **minus 289.5**
- The **Property and Insurance** sectors garnered the greatest proportion of '**Negative**' media coverage at **99% and 94%** respectively
- **Rip-Off culture** permeated all aspects of society
- Tourism and Telecommunications sectors came to *Ireland Inc.*'s defence
- Eddie Hobbs' '**Rip- Off Republic**' TV series was a significant contributor to damaging *Ireland Inc.*'s reputation

A full Quantitative Analysis of the national press, between January 1, 2003 and December 31, 2005, shows a progressive increase in the volume of coverage and reference to the issue of 'Rip-Off' in the context of "Ireland" and/or "Republic". What began as a whisper ended in a shout, and no aspect of Irish Society was safe from the phenomenon.

A Qualitative analysis of the coverage shows that the tone was both damning and damaging, and that the overwhelmingly negative nature of the coverage had a serious impact on *Ireland Inc.*'s reputation. With almost half of all coverage 'Negative', and under ten percent 'Positive' the outcome was that *Ireland Inc.*'s reputation took a serious battering, registering a **minus 1,364** on the **Corporate Reputation Indicator**. To better understand exactly what aspects of *Ireland Inc.* were contributing to this reputation drain, the analysis broke *Ireland Inc.* into 14 sectors.

Of all the sectors analysed, the **Retail Industry's coverage was responsible for the largest share of *Ireland Inc.*'s reputation drain (Fig. 6.1)**. The Retail Industry scored the lowest value on the

Corporate Reputation Indicator with a **minus 289.5** ranking. This is because over half of all coverage, at 59%, was 'Negative' while just 11% of the coverage rated 'Positive'. Everything from Santa Claus to going to the North for Christmas shopping drove the 'Negative' coverage.

The Property & Insurance Industries faced the most intense negative media reporting (Fig. 6.3). Property's coverage was 99% 'Negative', while Insurance was just slightly better at 94% 'Negative'. The old adage that no news is good news could be applied to these two sectors, because they both benefited from relatively low volumes.

The Rip-Off Culture permeated all aspects of Irish society. By the summer of 2005 there was literally no sector of *Ireland Inc.* unaffected by the 'Rip-Off' phenomenon. The term was applied to everything from what you might expect like the cost of cars, drinks, bank fees, grocery bills and government taxes to areas as esoteric as Priest's sermons, and burial plots. Eddie Hobbs was accused of participating in the Rip-Off Culture with his high speaking fees and even lap dancers were seen through the prism of 'Rip-Off'. It appeared that in the Ireland of 2005 Benjamin Franklin's old maxim, about there being nothing certain in life except death and taxes, could have been expanded to include "and being Ripped- Off".

The Tourism and Telecommunications sectors came to *Ireland Inc.*'s defence (Fig. 6.4). Despite the overwhelmingly negative tone of the coverage surrounding this issue, two sectors managed to actually come out ahead. Both Tourism and Telecommunications, at +15 and +18 respectively on the Corporate Reputation Indicator, responded to the accusations of Rip-Off in their areas and proactively countered these allegations. Fáilte Ireland warned that the 'Rip-Off cliché was dangerous' at the same time as figures showed that tourism continued to increase. ComReg went after the mobile phone industry to rein in costs and extra charges. These were the only small bright spots in an otherwise very gloomy landscape.

Eddie Hobbs' 'RIP OFF REUBLIC' TV series was a significant contributor to damaging *Ireland Inc.*'s reputation. Eddie Hobbs was fêted and celebrated for his articulating in plain and simple terms what was on everyone's mind. He, with increasing popularity, voiced what everyone was thinking: they were being ripped-off, were mad as hell and were not going to take it any more. This made Mr. Hobbs very popular with the general population and opposition politicians, but drew Industry's wrath and impacted the Government's popularity. He rated a minus 121.5 on the Corporate Reputation Indicator - from *Ireland Inc.*'s perspective, and this had a damning effect on *Ireland Inc.*'s reputation.

Conclusions

No corporation, institution or individual can withstand prolonged negative media coverage without long-term damage. Defence of an institution starts at the top and is the direct responsibility of the Corporate Communications and Public Relations teams. *Ireland Inc.* and many of the sectors within it are in dire need of PR rehabilitation. To allow this negative onslaught to continue unabated can only result in *Ireland Inc.* getting a 'bad reputation'. Once a bad reputation is established it is very difficult to change it. This battering has gone on for more than three years, but how much longer can this assault be sustained without permanent damage? These have definitely been difficult times for *Ireland Inc.* The challenge now is in the response. Yet, ironically, despite the vehemence of the domestic population there is no concrete evidence that sales and production are slowing down. In fact, the Retail Sales Index (Central Statistics Office, Ireland) continually showed expansion. It seems people are complaining all the way to the cash register, the ATM and the pub (Fig.6.5).

5.0 Key Metric Comparisons

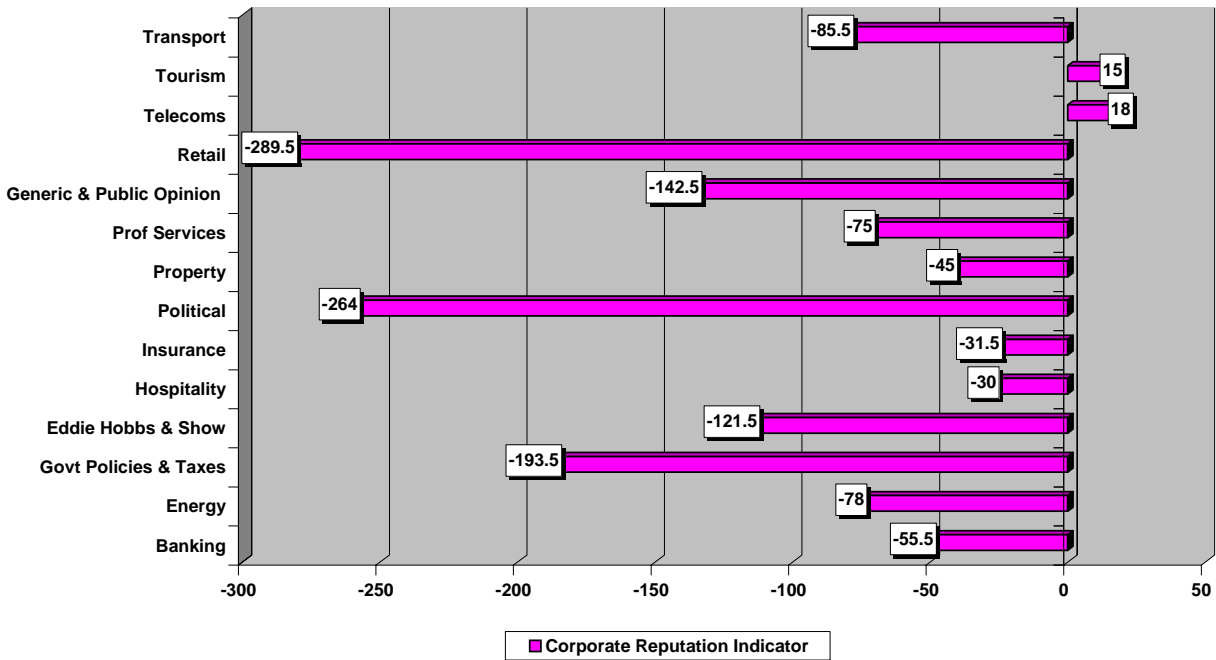


Figure 6.1 'Rip-Off' Ireland; Analysis of CRI (Corporate Reputation Indicator) by Sector

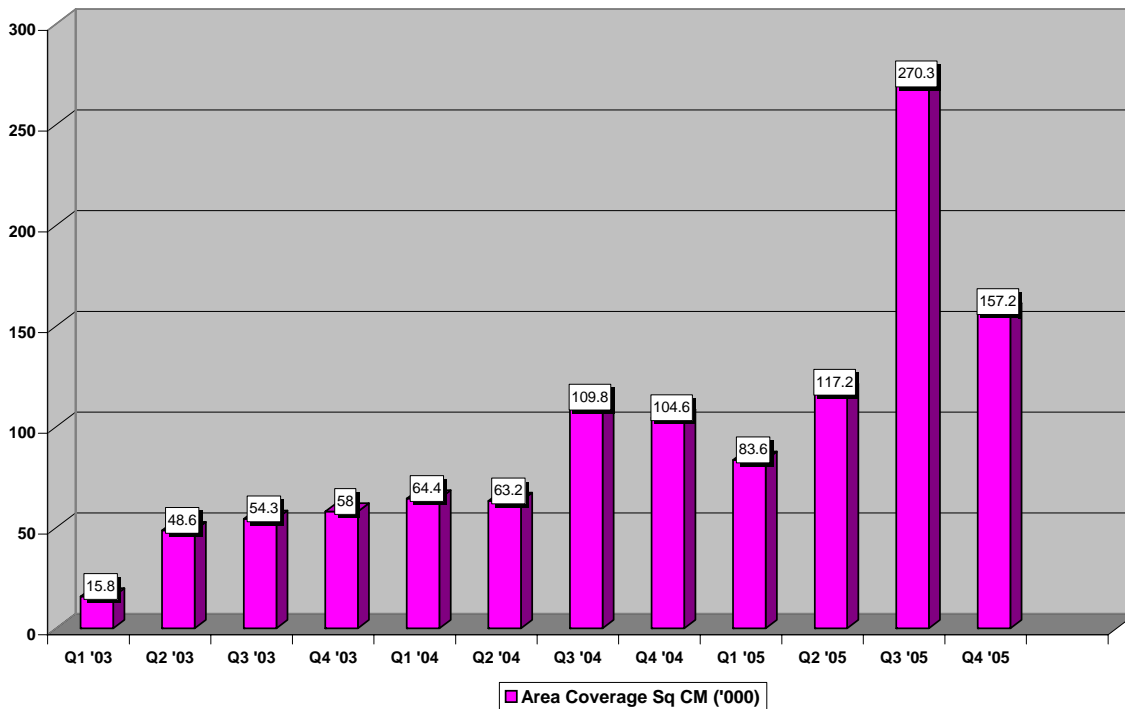


Figure 6.2 'Rip-Off' Ireland; Analysis of Weight of Coverage Jan 1 2003 – Dec 31 2005

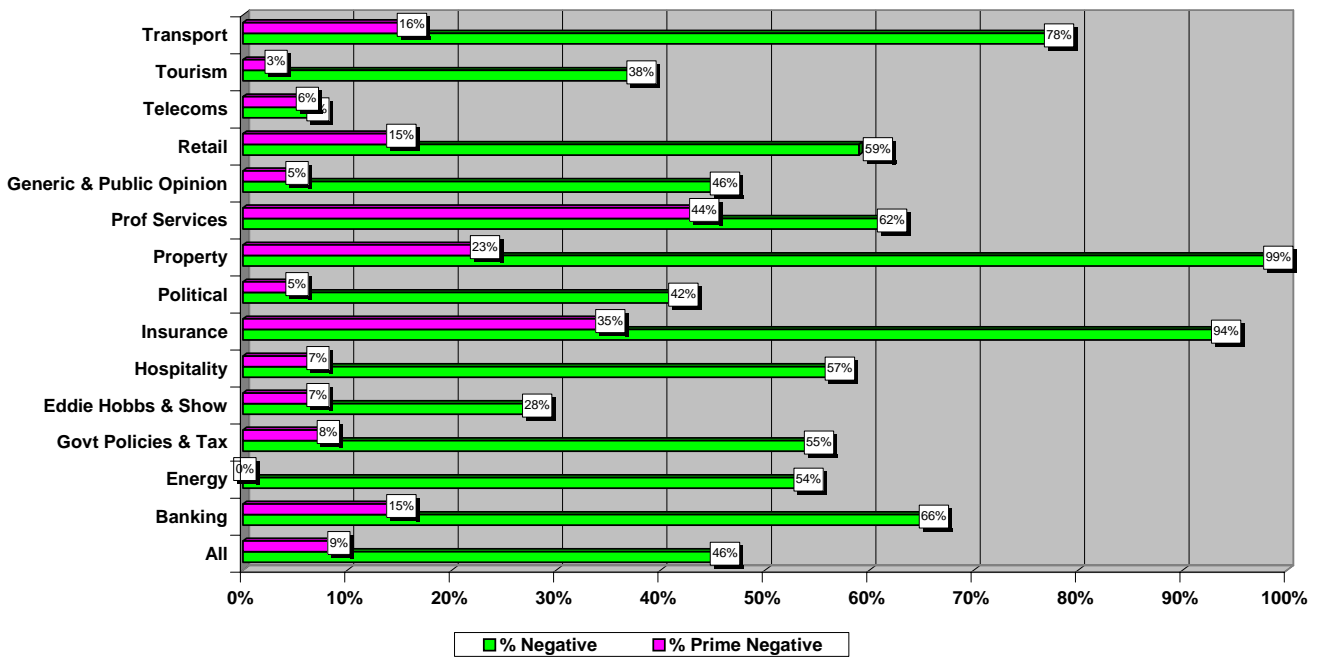


Figure 6.3 'Rip-Off' Ireland; Negative Impact / Influence metrics by sector

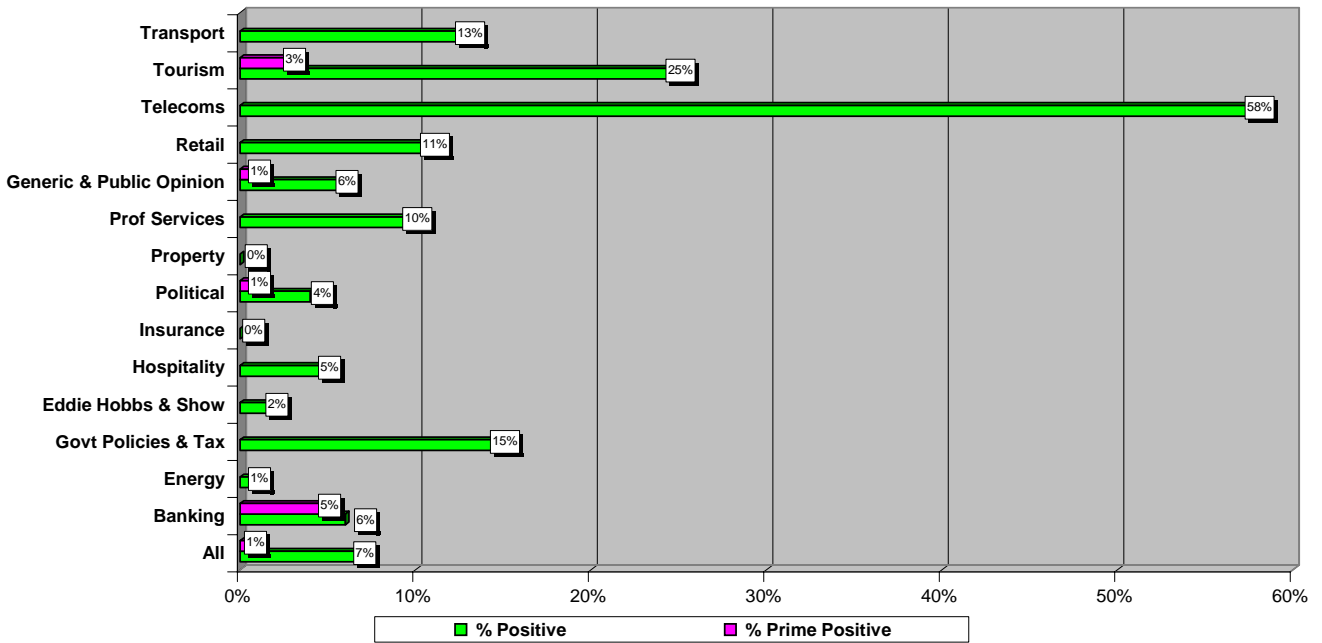


Figure 6.4 'Rip-Off' Ireland; Positive Impact / Influence metrics by sector

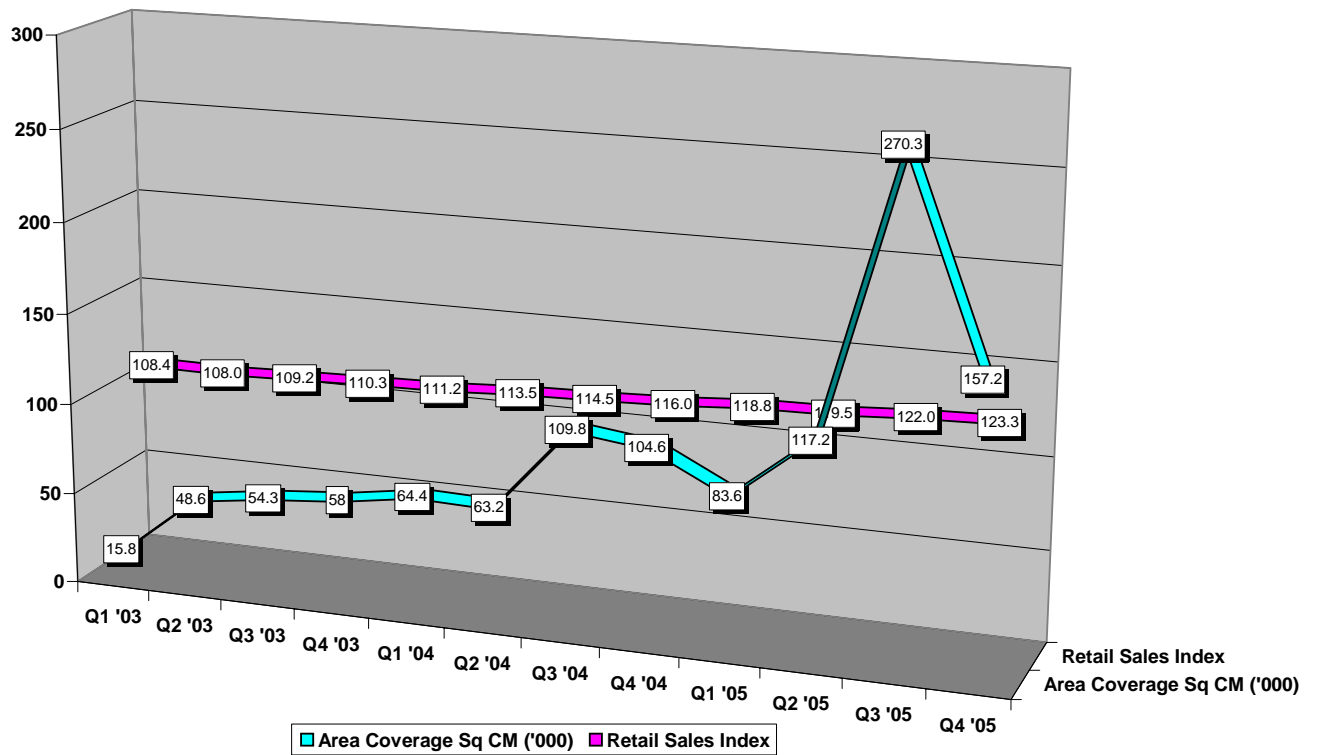


Figure 6.5 'Rip-Off' Ireland: Weight of Coverage versus Retail Sales Index

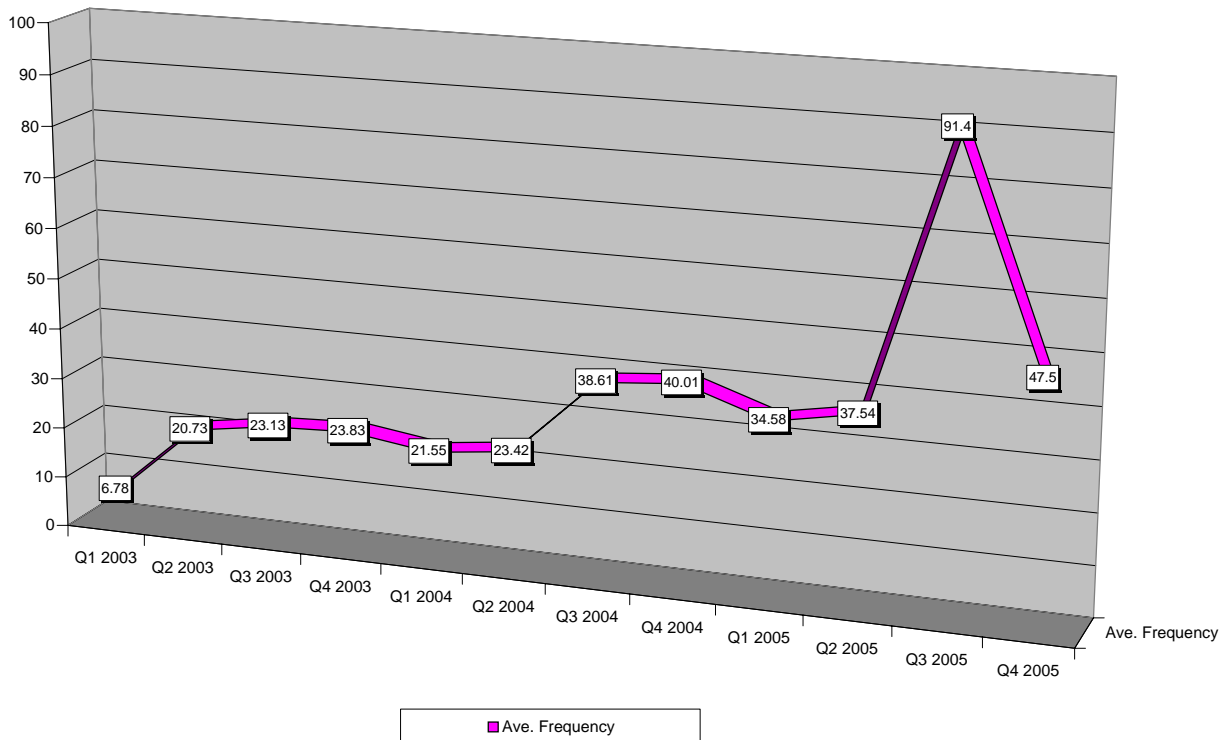


Figure 6.6 'Rip-Off' Ireland: Average Frequency of Message Delivery by Quarter

6.0 Quantitative Analysis Summary

During the Quantitative Analysis period, January 1, 2003 – December 31, 2005, there were 3,694 articles and they covered 1,245,674 sq cm of column space in the national press. There was a progressive increase in the volume of coverage and references to the issue of ‘Rip-Off’ in the context of “Ireland” and/or “Republic” during the analysis period. What started out with just 54 articles covering 15,805 sq cm of columns space in the first quarter of 2003, peaked in the third quarter of 2005 with 753 articles over 270,304 sq cm – a growth of 1,295 % in number of articles.

A detailed look at the volume trending shows that after an initial jump in early 2003 – from 54 to 152 articles in Q1 2003, there was slow but steady growth into the middle of 2004. Then there was another spike in volume – up to 313 articles, or 109,751.01 sq cm, in the third quarter of 2004. This is now almost six times the volume of 18 months earlier. The story was starting to get ‘legs’. Driving that volume were a wide variety of articles and issues covered by the media – including taxis, food prices, letters to the editor, banks, telecommunications, pubs and the drinks industry, hospitality (in particular hotel and restaurant prices), airlines and government/political angles. There were also stories that were starting to reflect on the impact of living in an expensive ‘Rip-Off’ environment. After that, the coverage started to slowly taper off with volumes dipping into the first quarter of 2005. However, by the second quarter of 2005 volumes jumped back up. Again, it was the usual suspects – banks, government, hospitality and letters to the editor that drove up the coverage. There were also more mentions of groups and associations created to counter ‘Rip-Offs’, but the phenomenon was so widespread that it was often described as the ‘Rip-Off Culture’ in Ireland.

Then in the third quarter of 2005 coverage volumes exploded – up to 753 articles. The big driver was the RTE/ Eddie Hobbs series ‘Rip Off Republic’. The pent-up fury of the media, public and politicians erupted. August saw a huge surge in volume and September had more coverage than any previous quarter, let alone month. September 4, 2005 alone had 61 articles – more than the initial quarter of 2003. There was a significant drop off in volume through the fourth quarter of 2005 – down to 427 articles, but this was still higher than any other previous quarter during the analysis.

7.0 Qualitative Analysis Summary

Overall, our Qualitative Analysis of the final four months of 2005: September 1, 2005 – December 31, 2005 coverage shows that there were 782 articles and the tone was both damning and damaging. The volume of ‘Negative’ coverage was over five times that of the ‘Positive’, with 46% and 8% respectively. The important ‘Prime Negative’ was over nine times the ‘Prime Positive’. What this means is that *Ireland Inc.*’s reputation took a serious battering and was reflected in *Ireland Inc.* registering a shocking minus 1,364 on the Corporate Reputation Indicator (CRI). However, to more accurately track what was driving the coverage it was divided into 14 sectors and each one had its individual impacts, influences and trends evaluated.

The results from the analysis showed that the Retail sector bore the brunt of the outrage and subsequently had the greatest impact on *Ireland Inc.*’s reputation. While it had only 12 % of the coverage, its Corporate Reputation Indicator rating contributed 21% to the total. While other sectors – like Property and Insurance, had higher levels of ‘Negative’ coverage, the combination of almost two-thirds ‘Negative’ coverage and a considerable volume resulted in the very low CRI.

7.1 Ireland Inc.

Key Evaluation Metrics:

Weight of Coverage: 290,406 sq. cm

Impact & Influence Analysis

Positive	6%
(Prime Positive)	1%
Neutral	46%
Negative	48%
(Prime Negative)	9%

Media Performance Index 9/100
Corporate Reputation Indicator (CRI) -1,364

The disastrous CRI rating of minus 1,364 shows that *Ireland Inc*'s reputation was negatively impacted by the Rip-Off Ireland/ Republic phenomenon. This is because 46% of the total 782 articles analysed were 'Negative', and the 'Positive' coverage was a dismal 6%. Even the 'Prime Negative' coverage at 9% eclipsed the entire 'Positive' coverage. There seemed to be no way of refuting the criticism and even the Government were forced to agree that prices were too high. This caused them to take the one reactive action seen in the entire analysis period – the repealing of the Groceries Order. The public and the media grabbed onto this topic like a dog with a bone and would not let it go. Every aspect of *Ireland Inc* was tarnished with the Rip-Off brush, from turkeys to taxes, to toyshops. Rip Off Ireland/ Republic was one of the main issues in Ireland in 2005, and nobody, not even Mr Hobbs himself could escape its wrath. Of the 14 sectors analysed, 12 of them suffered negative Corporate Reputation Indicator rankings – so they too were harmed by the media onslaught.

7.2 Banking

Key Evaluation Metrics:

Weight of Coverage: 6,641 sq. cm

Impact & Influence Analysis

Positive	6%
(Prime Positive)	5%
Neutral	29%
Negative	65%
(Prime Negative)	15%

Media Performance Index 9/100
Corporate Reputation Indicator (CRI) -57

With a CRI of minus 57 Banking was by no means the biggest contributor to *Ireland Inc*'s reputation drain. While the coverage on Banking was decidedly 'Negative' at 65%, the volume was sufficiently low to minimize the damage to both its own sector and to *Ireland Inc*. in general. Most of the 'Negative' articles referred to overcharging of clients and high banking fees. There was also reference to a lack of competition in the sector and the fact that Irish people are getting themselves into a worrisome state of debt. Driving the Positive coverage were articles about the financial

regulator's decision to introduce a code to prevent banks from offering unsolicited loans to customers who can't afford them.

7.3 Energy

Key Evaluation Metrics:

Weight of Coverage: 8,787 sq. cm

Impact & Influence Analysis

Positive	1%
(Prime Positive)	0%
Neutral	45%
Negative	54%
(Prime Negative)	0%

Media Performance Index 3/100

Corporate Reputation Indicator (CRI) -78

Given the international climate, it is not too surprising that more than half of all the Energy Sector's coverage was 'Negative', or that just 1% was 'Positive'. This is yet another category that contributed a little bit more to *Ireland Inc's* declining reputation. The CRI of -78 is as a result of fuel price increases. The majority of the coverage was 'Negative' at 69% and none was 'Positive'. Many of the articles focused in on how some service stations used the volatile international situation to exploit customers. There were a number of articles that showed quite a range in prices – alleging some operators of gouging. Most of the coverage came in September and then quickly tapered over the remaining months.

7.4 Generic & Public Opinion

Key Evaluation Metrics:

Weight of Coverage: 28,057 sq. cm

Impact & Influence Analysis

Positive	6%
(Prime Positive)	1%
Neutral	48%
Negative	46%
(Prime Negative)	5%

Media Performance Index 8/100

Corporate Reputation Indicator (CRI) -143

This sector is really the catchall sector for the multitude of areas that were charged with or seen to be participating in the Rip-Off culture. This included everything from priests to pole dancers, the public to publicans. It clearly illustrates the fact that everyone in Ireland was tagged with the Rip-Off label and nobody was immune. With a CRI figure of minus 143 it was the fourth highest and contributed significantly to *Ireland Inc's* reputation decline. Much of the 46% of the 'Negative' coverage discussed the fact that Ireland was a Rip-Off full stop, or discussed areas as diverse as childcare to ice cream costs. There were also articles that compared Irish costs to other countries

and even debated the pros and cons of moving to countries such as Australia. Some of the articles placed the blame for the Rip-Off culture on the Irish public themselves for putting up with the high-cost society. The small bright spots in this sector came from the fact that foreign direct investment was continuing to soar despite the Rip-Off claim and a survey showed that 92% of Irish people are happy, the highest figure in Europe.

7.5 Govt. Policy & Taxes

Key Evaluation Metrics:

Weight of Coverage: 29,205 sq. cm

Impact & Influence Analysis

Positive 15%

(Prime Positive) 0%

Neutral 30%

Negative 55%

(Prime Negative) 8%

Media Performance Index 12/100

Corporate Reputation Indicator (CRI) -194

With a CRI of minus 193.5, the Government Policy and Taxes sector played a significant role in damaging *Ireland Inc's* reputation. The government was repeatedly portrayed both as a perpetrator of the Rip-Off culture - with its stealth taxes on everything from ATM cards to cars, and as a supporter of it by maintaining an environment that allowed corporate greed and profiteering to flourish. They were repeatedly taken to task for allegedly wasting taxpayer's money. This all resulted in 55% of the coverage in this sector being rated 'Negative' and 8% of it being 'Prime Negative'. Following a *Prime Time* documentary Minister Michael McDowell was singled out for 'Ripping-Off' taxpayers by wasting €30 million on a jail site in September. There was also significant 'Negative' coverage on the use of €4.6 million to move the Department of Agriculture 20 yards from its original destination. However, the Government did manage to garner some 'Positive' coverage. This was as a direct result of the Government's response to the Rip-Off criticism by revoking of the Groceries Order. Minister Micheal Martin was portrayed as a strong decision maker, taking the consumer's side against the powerful RGDATA retail lobby group. The revoking of the Groceries Order was the only significant response to the Rip-Off accusation by any of the interested groups involved and proved quite successful in negating 'Negative' coverage.

7.6 Eddie Hobbs & Rip Of Republic TV Show

Key Evaluation Metrics:

Weight of Coverage: 53,125 sq. cm

Impact & Influence Analysis

Positive 2%

(Prime Positive) 0%

Neutral 69%

Negative 7%

Media Performance Index 8/100

Corporate Reputation Indicator (CRI) -122

Clearly, with a CRI of minus 122, Eddie Hobbs and his show: Rip-Off Republic, were major contributors to the negative impact on *Ireland Inc's* reputation. They finally managed to bring the issue to a head. There were 135 articles in this sector – the vast majority in September. While two-thirds of the coverage was 'Neutral', 29% of the coverage was 'Negative' with 7% of it 'Prime Negative'. Most of the articles discussing Mr. Hobbs reiterated the negative issues he was raising on the show: namely how everyone including big business, retailers, developers and the Government was ripping off the Irish consumer. Even Mr. Hobbs had the microscope turned on him; being accused of ripping-off his clients by charging €847 an hour. There was a modicum of 'Positive' coverage, 2%, and this was mainly relating to his role in ultimately getting the Groceries Order revoked.

7.7 Hospitality

Key Evaluation Metrics:

Weight of Coverage: 6,435 sq. cm

Impact & Influence Analysis

Positive	5%
(Prime Positive)	0%
Neutral	38%
Negative	57%
(Prime Negative)	7%

Media Performance Index 9/100

Corporate Reputation Indicator (CRI) -30

Hospitality was not a particularly big contributor to *Ireland Inc's* reputation deterioration with a relatively modest CRI of minus 30. This low number is as a direct result of the low volume of coverage. However, 57% of the coverage was 'Negative' with 7% 'Prime Negative'. Most articles in this area covered the Rip-Off prices of hotels, restaurants – in particular wine prices, coffee and Coca Cola. Donnie Cassidy's hotels were the focus of particular articles after he came out refuting Eddie Hobbs' Rip-Off claims. The small amount of 'Positive' coverage was garnered from research into areas where the prices were competitive and reasonable.

7.8 Insurance

Key Evaluation Metrics:

Weight of Coverage: 2,711 sq. cm

Impact & Influence Analysis

Positive	0%
(Prime Positive)	0%
Neutral	6
Negative	94%
(Prime Negative)	35%

Media Performance Index 2/100

Corporate Reputation Indicator (CRI) -32

The Insurance Sector had the lowest volume of coverage – and benefited hugely from this because what coverage it did have was primarily ‘Negative’, at 94%. However, there was absolutely no ‘Positive’ coverage, and more than a third of all the coverage was ‘Prime Negative’. This all helped to push the CRI rating to minus 32, so this sector played a small role in the denting of *Ireland Inc*’s reputation. The articles covered a wide array of Insurance issues from car insurance, to health insurance, to the fact that an insurance rate reduction of 30% did nothing to dent the profits of insurance companies.

7.9 Political

Key Evaluation Metrics:

Weight of Coverage: 206,299 sq. cm

Impact & Influence Analysis

Positive	4%
(Prime Positive)	1%
Neutral	54%
Negative	42%
(Prime Negative)	5%

Media Performance Index 8/100

Corporate Reputation Indicator (CRI) -264

This sector had the greatest volume of articles and contributed the second largest amount to *Ireland Inc*.’s damning Corporate Reputation Indicator score. Of the 224 articles, almost half the coverage was ‘Negative’ while just 4% was ‘Positive’. This pushed the CRI down to minus 264. Fianna Fail were crucified in the polls, with one poll suggesting that Fianna Fail could lose up to 20 seats if things didn’t turn around and all this was attributed to Rip-Off off Ireland. Fianna Fail Minister Seamus Brennan even went on TV to agree with the assertion that the country was a ‘Rip-Off’. Fianna Fail leader and Taoiseach Bertie Ahern at one stage suggested that he and Mr. Hobbs were allies in the war against “greedy profiteers”. The opposition parties tried to co-opt the whole issue, with Fine Gael claiming to have started the whole attack on the Rip-Off issue with a campaign and website pledging to deal with Rip-Off Ireland if elected. Politicians of all stripes constantly referred to the outrageous Rip-Off in the country. The small amount of ‘Positive’ coverage was the result of polls indicating that 33% of those in Irish society believed that their quality of life had improved. There was also more money promised to organisations such as the Competition Authority and the National Consumer Agency. However, the Rip-Off Ireland issue proved impossible to contain and ‘Negative’ coverage in the Political Sector added significantly to *Ireland Inc*’s reputation damage.

7.10 Property

Key Evaluation Metrics:

Weight of Coverage: 3,054 sq. cm

Impact & Influence Analysis

Positive	0%
(Prime Positive)	0%
Neutral	1%
Negative	99%

(Prime Negative) 23%

Media Performance Index 1/100

Corporate Reputation Indicator (CRI) -45

The only saving factor for this sector was the relatively low volume of coverage. With 99% of all coverage 'Negative', the less said the better. But, because of the low volume over four months the CRI was relatively modest at minus 45. Driving this coverage were articles targeting management fees and estate agents were that were accused of Ripping-Off the public. The issue of the price of property had very scant coverage and considering that this is such a contentious issue in this country, more articles might have been expected.

7.11 Prof. Services

Key Evaluation Metrics:

Weight of Coverage: 7,875 sq. cm

Impact & Influence Analysis

Positive 10%

(Prime Positive) 0%

Neutral 28%

Negative 62%

(Prime Negative) 44%

Media Performance Index 11/100

Corporate Reputation Indicator (CRI) -75

Coverage in this sector was almost two-thirds 'Negative' with a heavy 44% 'Prime Negative'. With a CRI of minus 75, the Professional Services were in the middle of the pack on the sectors analysed. Almost all of this coverage referred to a certain group of solicitors who were accused of Ripping-Off abuse victim clients. The 'Positive' coverage came from stories about the Competition Authority's intervention to ban Medical Consultant's from charging their private patients Rip-Off prices.

7.12 Retail

Key Evaluation Metrics:

Weight of Coverage: 31,750 sq. cm

Impact & Influence Analysis

Positive 11%

(Prime Positive) 0%

Neutral 30%

Negative 59%

(Prime Negative) 15%

Media Performance Index 5/100

Corporate Reputation Indicator -290

This area received the lowest CRI, rating at minus 290, for any sector analysed. An amalgamation of heavy coverage, heavy 'Negative' tone at 59% and more 'Prime Negative' than 'Positive' coverage, all combined to drive this very damaging CRI ranking. There was a wide and varying range of retail divisions covered, with everything from organic foods to Tupperware to pharmaceuticals attacked. A number of articles focused on the fact that some UK-based clothing stores and food chains charge higher prices for the same items in the Republic of Ireland than in their UK stores – seemingly corroborating the Rip-Off allegations. There were also articles focused on the growing number of people who travel to the North to buy their retail goods. This negative tone was then further reinforced by a number of articles about the fact that according to EU figures Ireland is the second most expensive country in the EU. Just 11% of the articles were 'Positive'. They concentrated on the fact that consumer confidence and spending were still strong and rising. Some letters to the Editor commented that not everything in Ireland was a Rip- Off and that you could find bargains if you looked. However, on the whole the Retail sector was instrumental in damaging *Ireland Inc*'s reputation.

7.13 Telecommunications

Key Evaluation Metrics:

Weight of Coverage: 2,509 sq. cm

Impact & Influence Analysis

Positive	58%
(Prime Positive)	0%
Neutral	35%
Negative	7%
(Prime Negative)	6%

Media Performance Index 30/100

Corporate Reputation Indicator (CRI) +18

This sector had the best CRI rating at plus 18 and was the only one where more than half of the coverage was 'Positive'. Driving the 'Positive' coverage were articles about ComReg's intervention to restrict mobile phone operators ripping off clients by limiting roaming charges and the introduction of a new code to end ring-tone rip-offs. There was also 'Positive' coverage focused on the new website www.callcosts.ie that was set up by Comreg so that telephone customers could log on and compare prices and get the best deal for their needs. There was also coverage about increased competition in the mobile phone sector benefiting consumers. Just 7% of the articles were 'Negative', with 6% of this 'Prime Negative'. These included pieces referring to the European Commission's concern with phone charges.

7.14 Tourism

Key Evaluation Metrics:

Weight of Coverage: 16,698 sq. cm

Impact & Influence Analysis

Positive 25%

(Prime Positive) 3%

Neutral 37%

Negative 38%

(Prime Negative) 3%

Media Performance Index 5

Corporate Reputation Indicator (CRI) +15

This was second sector to rate a Positive Corporate Reputation Indicator value. Much of this came from the proactive efforts of Fáilte Ireland claiming that the ‘Rip-Off’ label was a ‘dangerous cliché’ at the same time as releasing figures that overseas visits were increasing. There were also a number of articles about the people of Clonakilty making special efforts to try and counter the ‘Rip-Off’ accusations. The number of ‘Neutral’ articles almost equalled the amount of ‘Negative’ articles with the effect of neutralising the ‘Negative’ coverage. This combined with the fact that 25% of the articles ranked were ‘Positive’, boosted the CRI to +15. Driving the ‘Negative’ coverage were articles about the up-coming Ryder Cup and golf clubs boosting their prices and stories comparing costs with the North’s.

7.15 Transport

Key Evaluation Metrics:

Weight of Coverage: 8,703 sq. cm

Impact & Influence Analysis

Positive 13%

(Prime Positive) 0%

Neutral 9%

Negative 78%

(Prime Negative) 16%

Media Performance Index 4/100

Corporate Reputation Indicator (CRI) -86

With 78% of the coverage ‘Negative’, and 16% of all coverage ‘Prime Negative’, to only rate minus 86 CRI is rather fortunate. Driving the ‘Negative’ coverage were stories about everything from taxis and bus fares, toll charges and even the over charging for oxygen on an airline. Again, it is a regulatory body that gained the Positive coverage; in this case it is the Aviation Regulator limiting the surcharges applied to airline passengers.

8.0 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
- 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.

Corporate Reputation Indicator - is a numeric indicator of how media coverage is adding to / subtracting from a company or organisation's corporate reputation. The number is calculated based on the volume of media coverage, the impact/ saliency of this coverage and the influence or tonality of the coverage from the corporation's point of view. It applies both positive and negative values to coverage, thus calculating the overall impact to the corporation's reputation.

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 the 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

Readership is the average number of readers of a given publication

Readers per Copy = READERSHIP / CIRCULATION

Qualitative Analysis means being, at least in part, subjectively measured.

Quantitative Analysis means being objectively measured.