



Media Analysis Case Study

of

The Smoking Ban in the Republic of Ireland

PRII Annual Conference

April, 2004

Smoking Ban Media Analysis Summary

Key Findings of the Report

Analysis of Smoking Ban Media Coverage Shows Pro Ban Campaigners Won the Media Battle.

An 18 month research and evaluation programme into print media coverage of the smoking ban by MediaMarket, who are title sponsor of the event here today, has shown that pro ban lobbyists managed to capture and secure a greater aggregate share of voice in the overall media debate over anti ban campaigners.

MediaMarket's research also presents an in-depth analysis of one of the pro ban lobby groups, ASH Ireland, where it shows that although its overall share of voice was only 3%, its impact metrics were very impressive at 25% 'Prime' and 40% 'Significant', while its influence metrics were even more impressive with 73% positive and only 1% negative coverage. This shows that the input of even "small" players can be clearly tracked and evaluated to show the level of impact and influence they can have.

What was the purpose of the research?

To demonstrate:

- a. the benefits of media analysis and evaluation at the PRII Conference. This years conference is on issue management an a number of speakers are speaking on various issues ranging from Vegas City Application to Fingal Co. Co. (Fingal Co Co. speaker) to Obesity (McDonalds)
- b. that we can track and analyse the issue from many perspectives

The analysis report focused on the:

- Volume of Coverage in totality – impressive 5,996 articles covering almost 1.8m Sq. cm of coverage

- How this coverage was split between the Pro Ban and Anti Ban Lobby groups
- An analysis of the coverage by month to see peaks and flows
- Share of Voice of the key players in the debate
- In-depth analysis of ASH Ireland, one of the lobby groups to demonstrate how an issue should be tracked, analysed and evaluated
 - This in depth study of ASH Ireland showed that while their Share of Voice at 3% vis a vis the other key players was low, it was very effective on a number of fronts
 - Firstly their 'Impact' metrics were high at 24% Prime and 40% Significant
 - Secondly their 'Influence' metrics were very impressive at 73% Positive and only 1% Negative
 - Thirdly their message delivery was very consistent and clear-cut
 - Save Lives
 - Protect Health of Workers
 - Quit Smoking
 - Urging public support for the Ban
 - Most important health initiative this century – Historic Opportunity
 - Effective countering of Anti Ban arguments

2. Summary : Pro Ban Lobby

Won the media battle from the outset

- First to market with Micheal Martin's first announcement on Nov 7th therefore seizing the initiative
- Very strong media campaign immediately by the pro Lobby groups
 - 75% Share of Voice vs 25% for Anti Ban Lobby in the first month
 - Average over 70% Positive Influence Coverage and 25% Prime Impact
- Weight of Coverage - Range of bodies and organisations row in behind the Pro Lobby – Unions – Mandate, SIPTU and Impact, EU Commission (statement from David Byrne), Medical Profession, Irish

Heart Foundation, Irish Cancer Society as well as the established Pro Lobby groups – Office of Tobacco Control, ASH, Health & Safety Authority and Micheal Martin (Dept of Health) which was driving the campaign

- Immediate initiatives e.g.
 - o 27th Nov – Eastern Regional Health Authority issued a report claiming passive smoking killing 150 bar staff a year.
 - o 13th Dec – Office of Tobacco Control commences campaign to highlight dangers of passive smoking in the workplace
 - o WHO's International Agency for Research on Cancer releases papers concluding sufficient evidence to directly link passive smoking to cancer in humans
- Seized initiative again with announcement of complete Ban on Jan 30th
- Very strong countering of Anti Ban messages particularly on the issue of Economic Impact of businesses

3. Summary : Anti Ban Lobby

Also ran a strong campaign but took much longer to get going in terms of volume of coverage. IHIA mounted a successful campaign in July '03 – Can see from the analysis that the achieved parity of coverage with the Pro Lobby for that month

In terms of message delivery they also scored well with key messages on target such as:

- Economic effect on Businesses
- Enforcement Problems

However the Anti Ban lobby groups could not counter the fundamental message of Passive smoking being dangerous and the protection of workers health in ALL workplaces being of paramount importance

Impact and Influence metrics for the Anti Ban campaign were on a par with the Pro Ban but ultimately they did not have the weight of coverage that the Pro Ban had. Monthly Volume Analysis breakdown shows that in every single

month over the 18 month period, the Pro Ban campaign had a dominant share of media voice.

Appendix

Figure 1. Analysis of Press Media Coverage on the Smoking Ban between November 2002 and April 2004 by Month split between the Pro Lobby Groups and Anti Lobby groups.

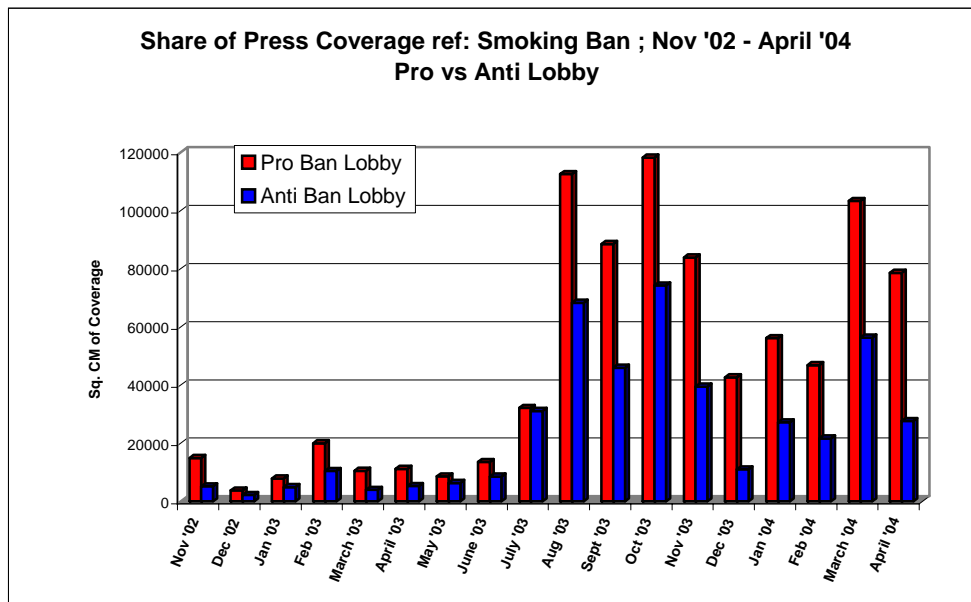
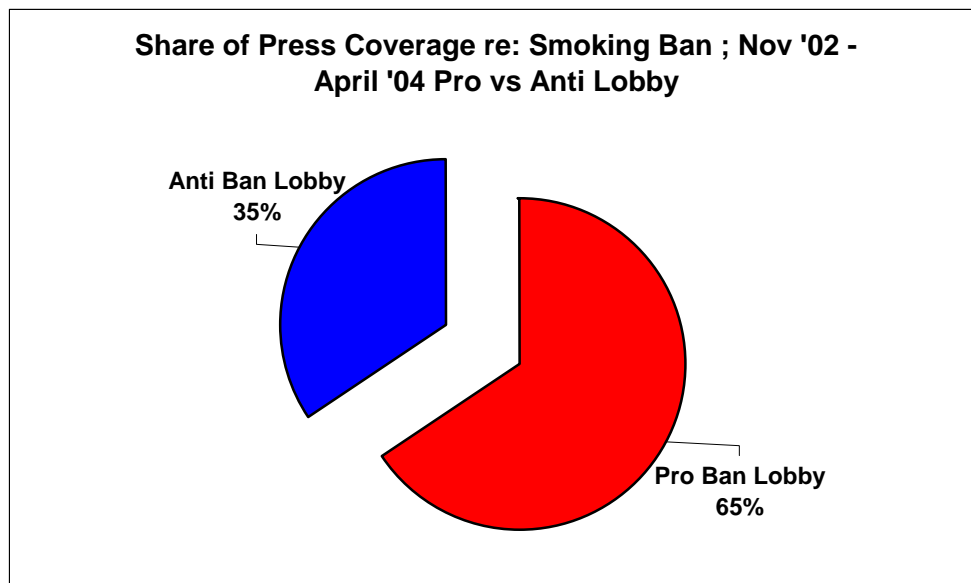


Figure 2. Analysis of Press Media Coverage on the Smoking Ban between November 2002 and April 2004 split between the Pro Lobby Groups and Anti Lobby groups.



Note:

Pro Lobby: ASH Ireland, Health & Safety Authority, Office of Tobacco Control, Medical Profession, EU Commission, Micheal Martin & Dept of Health, SIPTU, Mandate, Impact, Irish Heart Foundation, Irish Cancer Society

Anti Lobby: Vintners Federation of Ireland, Irish Hospitality Industry Alliance, Licensed Vintners Association, IBEC, Irish Cigarette Machine Operators Association, Irish Nightclubs Industry, Irish Hotels Federation, Irish Restaurants Association

Research and Evaluation carried out by MediaMarket, a specialist Media Analysis company.

Figure 3. Share of Voice Analysis of Press Media Coverage of the Key Players in the debate of the Smoking Ban

