

# A Review of Government Advertising in Northern Ireland

Draft Report for Consultation

Response from JCDecaux

P23, 4.12 ***‘A major concern for government is the lack of any robust audience research into outdoor media and this is an area we will be pursuing’***

We have commissioned JCDecaux Review research independently for over **80** large-format Northern Ireland outdoor campaigns since 2003. This has been carried out by the research company – Catalyst. This detailed research includes Recall, Liking, Understanding, Visibility, Clarity of advertiser, whether people felt it was aimed at them and Call to action for the campaigns. During this time we have researched 6 government campaigns.

As part of the JCDecaux Review research we also have extensive Lifestyle information. Some examples are holidays, attitudes to the Euro, shopping and travel.

The respondent profile matches the population of Northern Ireland in terms of age, gender & social class according to the latest census results. JCDecaux are happy to share a roster and results of all the Review research with government.

JCDecaux in partnership with the BBC commissioned the ‘Daily Life’ study in 2003. The study looked at how 6,650 people across the UK used their time throughout the day and which media they were exposed to. There were results from the survey specific to NI as well as showing differences between NI and the rest of the UK. JCDecaux are happy to provide further information to government and to make the presentation of Daily Life to interested people or departments.

## **1. Time spent Daily using ‘Media’**

All adults (hrs:mins)

	<b>UK</b>	<b>NI</b>
Watching TV	3:46	2:58
Listened to Radio	2:42	2:36
Read Newspaper	0:25	0:23
Read Magazine	0:08	0:11
<b>Out of Home activities</b>	<b>2:16</b>	<b>2:38</b>

Source: BBC Daily Life Study Apr-Sep 2003

## **2. Perceptions of media**

% Noticeability of **Large** posters at Roadside  
All adults

	<b>UK</b>	<b>NI</b>
Almost always notice	19.7	25.7
Often notice	34.1	30.5
Sometimes notice	33.6	39.2
Rarely notice	11.1	4.6
Not stated/not app.	1.4	0

Source: BBC Daily Life Study Apr-Sep 2003

% Noticeability of **Smaller** posters (bus stops etc)  
All adults

	<b>UK</b>	<b>NI</b>
Almost always notice	9.5	3.0
Often notice	24.2	26.3
Sometimes notice	41.7	43.7
Rarely notice	22.6	27.0
Not stated/not app.	2.0	0

Source: BBC Daily Life Study Apr-Sep 2003

P26, 4.17 ***‘Outdoor – increasing number of formats, complex market with limited research’***

JCDecaux would maintain that outdoor is not a complex market – especially in terms of large-format. There is research available in terms of recall, awareness and call-to-action for campaigns (see notes above).

The outdoor market in Northern Ireland comprises large-format, small-format and transport. We consider outdoor to be the last true broadcast media available due to the fragmentation in other media such as TV, Radio and Press.

We would propose that outdoor should be treated separately from ambient formats such as petrol pumps, washrooms etc.

P32, 5.16 ***‘Conduct central negotiations with the media owners, but continue to buy media through individual agencies.’***

JCDecaux would welcome the opportunity to further explore the idea of central negotiations for media.

P33, 5.23 ***'An exception has been made for outdoor/ambient advertising where an industry standard does not exist but they will be encouraged to develop a research-based approach to facilitate evaluation.'***

JCDecaux are committed to driving an industry-accepted model for audience measurement as soon as is practical. The Outdoor Media Association (OMA) which includes JCDecaux, Clear Channel, Viacom & Avenue Media, launched the CAFAS system for measuring outdoor audience in the South of Ireland on 27<sup>th</sup> September 2005. The system, though still in its early days, will give a very accurate projection of coverage and frequency of outdoor campaigns. Development of the project took over 6 years to complete and a considerable financial commitment has been made. We will be reviewing the learnings from this new system in the near future to see how a system can be implemented in Northern Ireland.

P35, 5.28 ***'EIS will develop an ongoing advertising training programme for all staff involved in the procurement and management of advertising'***

JCDecaux would be happy to offer our knowledge and services to government as part of an ongoing training program. We can offer briefings to staff on large-format outdoor advertising and we would welcome the opportunity to discuss this further with government.

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