

highlights...

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Making behaviour change...

Tackling some of society's most intractable and costly problems often requires the Government to change people's behaviour in some way, from getting them to turn off lights to encouraging regular blood donation.

From the tragic consequences of driving too fast to the long-term damage caused by smoking and overeating, there's no doubting the enormous personal, social and economic costs of some people's behaviour on both individuals and wider society.

The success of many government policies and priorities increasingly depends on achieving behaviour change with the greatest effectiveness and efficiency. The cost of obesity, at £4.2 billion a year,

is not only a burden on the taxpayer but a lost opportunity to invest in other areas of society.

At COI, we have been working with the Government Communications Network (GCN) to increase our understanding of the factors that influence these behaviours and how communications can be used most effectively to help change them.

Turn to page four to find out more.

...pay for itself

Securing behaviour change is one thing, but how is it possible to calculate what the financial return on that investment is? And how does that measure up against other tools of change that government has like regulations, sanctions and incentives? A new report from COI has set out a common approach to calculating the financial effectiveness and efficiency of public sector marketing.

The study, thought to be the first of its kind, aims to stimulate discussion among government, the marketing industry and academia.

The report proposes a series of universal definitions to ensure that practitioners adopt the same terminology and outlines a ten-step process to help determine robust estimates of 'Payback' – the absolute financial benefit delivered by marketing – and 'Return on Marketing Investment' (ROMI) – the number

of pounds of Payback delivered, less the cost of the marketing – for every pound spent. It also provides six key principles that should underpin this process.

Done well, analysis of these measures can be used to better demonstrate not only the role of communication in helping to deliver successful policy objectives but also the real value to the taxpayer.

Turn to page two to find out more.

£18m

The savings made by HM Revenue and Customs from the online and on-time filing of tax returns – attributed to the ‘Tax doesn’t have to be taxing’ campaign (source: HMRC, 2009)

ADVICE



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Your campaign BUT IS IT COS

By Kevin Traverse-Healy and Matthew

One of the key questions about public spending is whether it represents value for money. Marketing and communication can often be in the firing line, not least because they are so visible. However, as COI’s report on behaviour change shows, society can benefit enormously from effective campaigns. But is it possible to put a cash value on the benefit?

Government marketing has a great story to tell: the 1998–2005 Teacher Recruitment campaigns not only paid for themselves but should provide returns of another £85 for every £1 spent. And Tobacco Control campaigns in 2008 persuaded 171,000 people to quit smoking in one year, saving the NHS an estimated £113 million against a marketing spend of £22.6 million. But although evaluation of return on investment by public sector marketing is already carried out in government – and in some cases very well – it is carried out inconsistently.

Not all communication interventions are suitable to evaluate in terms of money saved. How do you monetise voter registration, for example? However, we believe that many benefits to society can be ascribed a financial value and that this type of evaluation should be common and consistent across government.

As part of its Holistic Evaluation Initiative, COI has been taking a close look at how government can determine sensible and robust estimates of ‘Payback’ – the absolute financial benefit delivered by marketing – and ‘Return on Marketing Investment’ (ROMI) – the number of pounds of Payback delivered, less the cost of the marketing.

The result is a discussion document that has been circulated widely and has already created debate and comment, all

generally supporting the need to address the subject now.

Working with two acknowledged industry experts, Les Binet (co-author of *Marketing in the Era of Accountability*) and Sarah Carter, of advertising agency DDB, COI started by proposing a series of definitions that we believe would help practitioners adopt a common terminology.

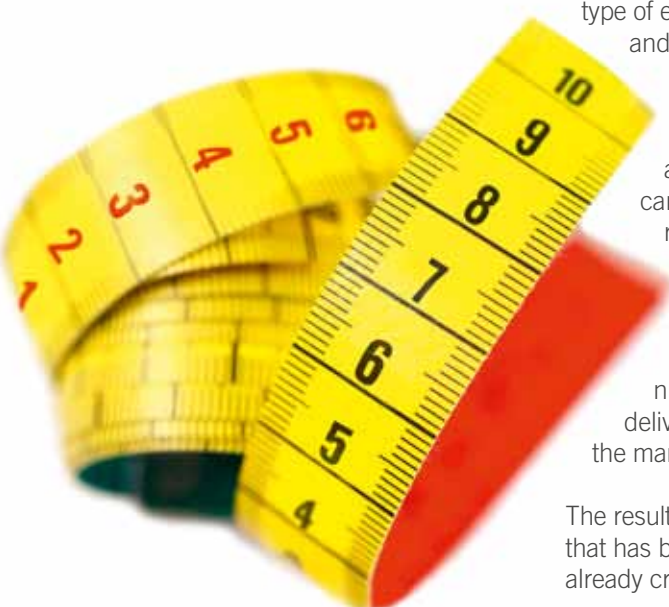
Our paper then outlined a **ten-step process** to calculate benefit and suggested **six key principles** (see opposite page).

Real examples include the savings in treatment costs to the NHS from reducing smoking and the reduced cost in administering the tax system from encouraging online self-assessment.

A raft of measurement and evaluation methods can be used to measure the efficiency and effectiveness of campaigns, and Payback and ROMI are but a small part of the evaluation picture.

However, analysis of these measures, where appropriate, can demonstrate not only the role of communication in helping to deliver successful policy objectives but also their value to the taxpayer.

After feedback (see ‘Having your say’), the amended document is planned to become the definitive guide on this issue for public sector communicators – in the same way as HM Treasury’s Green Book sets out the core principles of public sector economic assessment.



£189m

The estimated cost of crime prevented by Home Office anti-acquisitive crime campaigns between 2005 and 2007 (source: Home Office, 2009)

EVALUATION

n looks great – T EFFECTIVE?



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Taylor, COI Strategic Consultancy

TEN STEPS TO CALCULATE PAYBACK AND ROMI

- 1 Map objectives to outcomes and check expected contribution.
- 2 Identify stakeholders and set the scope of analysis.
- 3 Plan to measure campaign outcomes.
- 4 Measure the impact of the campaign.
- 5 Put a value on the impact of the campaign.
- 6 Calculate Payback at present values.
- 7 Calculate costs at present values.
- 8 Calculate Net Payback and ROMI.
- 9 Understand Payback and ROMI.
- 10 (Optional) Calculate Advanced Payback and ROMI.

SIX KEY PRINCIPLES FOR ANALYSIS

- 1 Start with an understanding of what your campaign is trying to do and how it will work.
- 2 Isolate the impact of your campaign from the effects of other factors.
- 3 Make conservative but realistic estimates of the value of the impact.
- 4 Be transparent: show all your working and list all your assumptions.
- 5 Net Payback is usually more important than ROMI.
- 6 Do not use Payback and ROMI to make decisions in isolation from other measures.

HAVING YOUR SAY

The paper on Payback and ROMI in the public sector can be found on the COI 'Big Thinkers' blog at coi.gov.uk/blogs/bigthinkers, or email your thoughts to evaluation@coi.gsi.gov.uk.



CASE STUDY TRAINING AND DEVELOPMENT AGENCY FOR SCHOOLS

How did the Teacher Recruitment campaigns between 1998 and 2005 pay for themselves and pay back another £85 for every £1 spent?

Between 2000 and 2005, 66,829 people joined teacher training courses as a result of marketing campaigns which began in 1998. Given the 34% attrition rate in teacher training at the time, this meant that 44,107 teachers joined the profession between 2001 and 2006, so the Government did not have to pay for more expensive supply teachers.

The average teacher salary at the time was £28,600, and the average cost of a supply teacher was equivalent to £36,000, so the annual saving for every teacher recruited was around £8,000. With the average teaching career lasting 15 years, the career saving per teacher would amount to as much as £120,000. Multiplied by the 44,107 recruits, this represents a total saving to the government of £4.91 billion. The total cost of the campaigns was £57 million. So, Net Payback was £4.85 billion, and ROMI £85 – £4.85 billion divided by £57 million. A more recent TDA case study shows similar returns.

73%

After seeing FRANK anti-cannabis advertising, 73% of people said they would be less likely to take cannabis in the future (source: Synovate/COI, 2009)

INSIGHT



Changing behaviour for the better?



By Mark Lund, COI Chief Executive mark.lund@coi.gsi.gov.uk and Sheila Mitchell, Deputy Director of Marketing, Department of Health sheila.mitchell@dh.gsi.gov.uk

Embedding a greater understanding of the importance and role of behavioural theory among those working in government communications is crucial. This knowledge should help inform campaign strategies, from development through to evaluation, thus ensuring that communications are as effective as possible.

THEORY INTO PRACTICE

Putting theory into practice demands a deep understanding of what's behind human behaviour in specific situations. This means looking at the many factors influencing a person's lifestyle choices, including their health, their work, their family and friends and even their role in society, and how they might react to or feel about a particular issue.

Behavioural theory helps us understand:

- why **knowledge, awareness, attitude, emotion** and **habit** play a part in a person's likelihood to change;
- how willingness to change can be influenced by factors at different levels:
 - personal – the individual's level of knowledge about or belief in their ability to change;
 - social – how individuals relate to and influence each other; and
 - environmental – local factors, such as an individual's community, and wider factors, such as the economy;
- shortcuts and rules of thumb that people use to negotiate their busy lives;

- their internal biases, such as discounting longer-term gains for shorter-term rewards and preferring the status quo; and
- various stages of change that individuals and groups undergo, from **contemplation** through **action** to **successfully embedded changed behaviour**.

BETTER PLANNING, BETTER OUTCOMES

Such in-depth knowledge about our audiences helps define the very role for communications, in terms of shaping how communications are framed, delivered and received so that messages penetrate and are understood. It is also important to understand how communications fit alongside other influences on people's behaviour that may be better leveraged through interventions such as legislation, enforcement and stakeholder engagement.

Such an approach has been successfully adopted by the Department of Health's **Change4Life** healthy living campaign, which has used a behaviour change journey to guide its development (see case study).

At COI, our new guidance suggests a five-step planning process to help government communicators develop a strategy or campaign plan that makes use of behavioural theory (see opposite). But this is just the beginning of our journey to embed behavioural theory more widely into government communications.

We are currently setting up an approved suppliers list comprising experts in behavioural economics and social psychology whom we can involve in the planning process, but what we really want is to start an ongoing dialogue with colleagues across government to help take this thinking forward.

On page 7 we look in detail at how the health sector is using behaviour change models to make a difference.

COI's guidance *Communications and Behaviour Change* can be downloaded from coi.gov.uk/behaviourchange. Or you can email behaviourchange@coi.gsi.gov.uk to request a hard copy. You can also join the debate on the 'Big Thinkers' blog at coi.gov.uk/blogs/bigthinkers.

69

The average Briton sends 69 text messages a month

(source: comScore, November 2009)

BEHAVIOUR CHANGE



FIVE-STEP PLANNING PROCESS

- 1 Identify the behaviour that your policy and/or communications activities are seeking to influence.
- 2 Identify all the factors influencing the behaviours that relate to your policy and communications goals. These factors will vary among different audience groups, and various behavioural theories may be needed to understand them fully.
- 3 Develop or adapt a practical model that brings together all the relevant behaviours and influencing factors.
- 4 Build a marketing framework to show how all types of intervention – legislation, enforcement and stakeholder engagement as well as communications – can work together to deliver change.
- 5 Create a communications model using the marketing framework to identify the role that communications can play. Often this role will be to influence factors or intermediate behaviours rather than to directly affect the end behaviour.

CASE STUDY **change 4 life**

ISSUE

In January 2009 the Department of Health (DH) launched a national campaign to tackle obesity. Change4Life forms part of a wider cross-government strategy promoting healthy living, which includes initiatives such as building safe places to play, promoting healthy food in schools and developing an active transport policy.

Obesity is caused by a wide range of factors, from environmental to economic, but when the campaign began there was no behaviour change model for obesity prevention.

SOLUTION

The DH Change4Life team reviewed behaviour change theories and audience research to develop a marketing campaign on a hypothetical behaviour change journey. The plan was to adapt the hypothesis as the campaign progressed.

The marketing plan was split into six phases that map onto the behaviour change journey:

Pre-stage: Engage with workforces and partners, including local service providers and Non Governmental Organisations, both face to face and through direct marketing.

Phase 1: Reframe obesity as relevant to the target audience groups, with the aim of encouraging a societal movement, through a multimedia campaign and by building partnerships with healthy living brands.

Phase 2: Personalise the issue by making people realise that their behaviours could be putting themselves and their families at risk.

Phase 3: Use research to define eight types of typical 'behaviours' that families should adopt to improve their lifestyle.

Phase 4: Inspire people to change through locally targeted activities and real-life stories in the local and national press.

Phase 5: Offer ongoing support and encouragement to at-risk families going through the change process, delivered by post and online.

RESULTS

It is too early in the campaign to validate all the assumptions made about behaviour change, but early results suggest that behaviour is being positively influenced by the campaign. The ultimate aim is to establish a correlation between campaign response, behaviour change and improved health outcomes.

45%

of cigarette smokers in London are trying to give up (source: TGI, 2009)

INSIGHT



Behaviour change: in good health



By Humphrey Pring, COI Deputy Director of Strategic Consultancy with lead responsibility for health humphrey.pring@coi.gsi.gov.uk and Rachel Spencer, Senior Public Health Manager, NHS Kirklees rachel.spencer@kirklees.nhs.uk

It's not surprising that a large part of the increasingly active debate about behaviour change comes from the health sector. Getting people to change certain lifestyle behaviours, such as smoking and overeating, is essential to protect not only the health of the population but also the financial viability of the entire healthcare system.

Sir Derek Wanless looked to quantify the social and economic price of behaviour change in his 2004 review, *Securing Good Health for the Whole Population*. His independent analysis estimated that if the UK public made optimal health decisions about their health over a 20-year period, life expectancy would increase by 2.9 years for men and 2.5 years for women. It would also save the economy around £30 billion.

COI works extensively with colleagues in the NHS on local behaviour change programmes, and the following is some of what we have learnt from our experiences.

DON'T ASSUME YOU KNOW YOUR AUDIENCE

In a recent project for NHS Wandsworth, a primary care trust (PCT) aimed to increase rates of breastfeeding. Research showed that the women who had rejected breastfeeding were educated and comfortably well off, and were choosing to have more freedom after their baby's birth. Without this insight, it might have been assumed that the target mothers were from the distinct pockets of deprivation in the borough – a group well known by the PCT.

Only by putting individuals at the heart of our thinking can we start to understand their motivations and influences. The case study opposite

identifies some of the indicators and insights that contribute to high infant mortality rates in Kirklees.

USE EXISTING KNOWLEDGE AND SAVE MONEY

There are opportunities for us all to save time and money by making the most of knowledge already available from other sources – national, regional and local. This knowledge can then be enriched and brought alive by local insights from qualitative research and geodemographic tools to localise the challenge and the solutions. For example, in a child obesity programme in London, qualitative research identified that free swimming was an appropriate intervention for three family groups:

- 'pressured': families with struggling parents who lacked confidence, knowledge, time and money;
- 'treaters': affluent families who enjoy indulging in food; and
- 'traditional': those with strong family values but who eat energy-dense food and know they need to exercise more.

Geodemographic data was then used to identify the location of the at-risk families and their nearest swimming pools, allowing a targeted engagement programme to be designed.



85%

Women are 85% more likely than men to have an underweight BMI and 10% more likely to have an obese BMI (source: TGI, 2009)

BEHAVIOUR CHANGE

REMEMBER: THERE'S MORE THAN ONE MODEL

Behaviour change models can be very helpful, but at COI we don't prescribe one single model, and nor do we use them as standalone tools. One social psychologist described them succinctly as "concepts that will help people use their heads".

COMBINE COMMUNICATIONS WITH OTHER INTERVENTIONS

If behaviour change on any issue is to be sustainable, it's crucial that all those involved with its delivery are engaged at an early stage and are clear about their role. Often, local frontline workers, stakeholders and partners can achieve a greater and longer-lasting effect in behaviour change than paid-for media can on its own. For example, interventions such as better street lighting, training staff from local sports clubs and motivating kids in schools can work effectively alongside communications, to really

encourage children to undertake 60 minutes of physical activity in the local neighbourhood.

Creating a marketing framework allows you to understand how interventions work together and to identify the role for communications, as outlined in step 4 of the planning process identified in *Communications and Behaviour Change*.

TEST, EVALUATE AND ROLL OUT WHAT WORKS

Piloting is an important part of testing behaviour change programmes and with the unprecedented pressure on public expenditure, evaluation is vital to prove the work's effectiveness and to galvanise the whole organisation to roll out the programme more widely.



HOW COI CAN HELP

COI has dedicated teams in Birmingham, Leeds, London and Manchester to provide flexible and fast access to its full range of services to the NHS, including all the in-house teams and supplier frameworks. The COI teams can help strategic health authorities and PCTs tackle local health challenges effectively and efficiently by making the best use of existing local and national knowledge in intervention delivery and evaluation. Contact themix@coi.gsi.gov.uk for more information.

CASE STUDY NHS KIRKLEES

CHALLENGE

- The PCT's Annual Health Report in 2008 revealed infant death rates of twice the national average in some specific areas.
- Infant death is a key indicator of a range of poor health behaviours among women of childbearing age.
- In the PCT:
 - 25 per cent booked in to see a health practitioner after 16 weeks of pregnancy;
 - 40 per cent were overweight or obese;
 - 60 per cent weren't physically active;
 - 30 per cent smoked at the time of birth; and
 - 30 per cent drank over the sensible limits.

SOLUTION

- Review of local and national data and insight research.
- Immersion in the immediate local area to gain in-depth understanding of the area, the estates and the facilities.
- Interview of frontline workers: community workers, Sure Start managers, midwives.
- Gathered learning from behaviour change studies and social influence theory.
- Development of pen portraits of three groups of women we wanted to influence.
- Workshops were run with PCT health improvement practitioners to develop social marketing pilots.

OUTCOMES

- The business case for three pilots – dance sessions, pregnancy support and cooking sessions – was approved by the PCT finance committee.
- Formative research among women was completed to ensure that the pilots met real needs.
- Evaluation is being designed to review the impact of the pilots.
- Pilots kicked off in summer 2009 and will run through to spring 2010.

48m

There are 48 million mobiles in circulation in the UK.
Of these, over 13 million are smartphones

(source: comScore, November 2009)

COMMENT



Mobile:

By Maxine Brown, COI Mobile Creative, Production and Technology Specialist
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Over the past decade the mobile phone has become the one gadget we can't live without – irrespective of who we are or where we live. From City boys to silver surfers, nearly all of us are mobile natives: 97 per cent of people in the UK own a mobile. So as government communicators we must fully understand the vast potential of the mobile medium.



The Royal Navy iPhone app received over 60,000 downloads in its first 4 weeks.

THE SMARTPHONE ERA

Mobile has finally arrived. With talk of smartphones, apps, mobile search engine optimisation (mSEO) and other well-documented developments in mobile telephony, mobile has established itself as a bona fide marketing channel. The release of the iPhone in 2007 and, more importantly, the Apple app store in 2008 triggered a seismic shift in general perceptions towards the potential of the mobile medium. Applications, larger screen sizes and limitless internet data downloads on O2 saw the iPhone create a much superior mobile engagement experience – forcing other major mobile players to follow suit and innovate. As recently as 2008 Adverblog commented that although “98 per cent of creative directors have an iPhone, 1 per cent of actual people have one”, but this is no longer the case. The iPhone is no longer exclusive to O2 (or creative directors), price plans and data tariffs have fallen, and Christmas smartphone sales were phenomenal.

THINK STRATEGY, NOT JUST TECHNOLOGY

The mobile is a great channel for enhancing a campaign – it can be as targeted or as generic as you need it to be. It is instant. It is on the move. It is always with its owner. So, with this in mind, government communicators who have been cautious so far should carefully consider the opportunities that mobile can offer. The growing adoption of smarter, more affordable handsets will only serve to allow a deeper level

of public communication via mobile. To remain relevant, government needs to begin facilitating this deeper level of engagement with the public – without invading their personal mobile space uninvited. We can support and expound our messages, on the move, by making our mobile communications accessible, functional, entertaining and viral – all at once.

APP EXCITEMENT

With all the excitement reported around smartphone apps, it's certain that they are a great mobile delivery mechanism, but we shouldn't default to creating apps for the sake of it. The mobile delivery mechanism you choose should always be profiled against your target audience and campaign objectives. How many people are there, what types of phone do they have, what are their mobile habits and how can mobile enhance the message? For commercial campaigns, apps are great gimmicks for entertainment or PR (awareness) value, and they can offer targeted demographic groups a richer, more personal campaign experience. But for government communicators the focus should always be strategic. Sometimes, for mass reach, a solid SMS campaign is still the right execution – but it really depends on who you're talking to, what about, when and where.

SUCCESSFUL APPLICATION

The Royal Navy iPhone application that was recently launched, in conjunction with COI, to recruit engineer officer

1/3

A third of people under 30 use their mobile phones for social networking

(source: comScore, November 2009)

DIGITAL ENGAGEMENT

the smart way to reach your audience

candidates was right for the audience. As “tech-savvy optimistic achievers”, the iPhone app catered to their love of superior, cutting-edge technology while challenging them to undertake the types of mission an engineer officer would

specific needs and trends emerging from the audience data is the way forward. There is potential to move away from generic audience groupings to much more succinct individual profiles detailing exact age, gender, interests, qualifications, occupation, location, dietary requirements, smoking habits and so on – all of which will make for unprecedented time- and location-

by 150 per cent by 2013 the future certainly looks promising. Online and mobile experiences are merging, and this year people will expect government to venture deeper into mobile to provide the same great levels of engagement they already experience with commercial brands.

This expectation will make for an interesting challenge. One that we must embrace wholeheartedly.



encounter. The app was an interactive game with career and remuneration information, a call-back facility, links to the website for more information, functionality to challenge a friend to beat your score and a Facebook widget version for reach. It received over 60,000 downloads in its first four weeks and is still going strong.

THE NEXT PHASE

Looking to the future, government and public sector communicators will need to move away from developing solitary, campaign-based executions that function in isolation (and that often have a limited shelf life). Gathering the right, opted-in information from our audiences and creating communications that are based on the

based targeting opportunities. Especially where, for example, recruitment or local activity is involved.

As a marketer, I'm excited knowing that my phone can remind me of doctor's appointments, plan my tube journey, research swine flu, compare hospital rankings, catch breaking news, vote, socialise, interact with the brands around me and communicate with my mother – all from one device.

By its very nature the mobile medium is constantly evolving, and with *New Media Age* predicting that the UK's mobile marketing spend will increase

MOBILE DECODED

Smartphone: a mobile phone offering advanced capabilities, often with a touchscreen interface and PC-like operating system featuring email and internet.

Mobile apps: mobile software facilitating everything from maps and cooking guides to games and mobile shopping.

mSEO: mobile search engine optimisation.

Augmented reality: a term for a mixed reality where the view of a physical real-world environment contains elements merged with virtual computer-generated imagery.

QR code: a two-dimensional bar code used for storing commercial information such as addresses and URLs. The codes allow its contents to be decoded at high speed.

MobSocNet: social networking where one or more individuals of similar interests chat and connect with one another using their mobile.

0.75 m

BBC Radio 4 added more than 750,000 listeners in 12 months – their biggest audience for 10 years

(source: Rajar, 2009)

ANALYSIS

Data analysis of the media

TOP FIVE MEDIA CHANNEL STORIES

- 1 New Skiff e-reader could be the future for print media.**
Publishers are excited about a new touchscreen mobile device which, like the web, can be used to view editorial content and advertising.
- 2 Magazine content moving online. Is this good business?**
Some of *Marie Claire*'s editorial content is to appear for the first time on Microsoft's MSN portal.
- 3 The Mail on Sunday 'revamps' its product for the New Year.** The newspaper has recently redesigned its supplements, perhaps in an attempt to improve its declining advertising sales over the past 12 months.
- 4 The BBC is in partnership with ITV, Channel 4, Five, BT and TalkTalk to launch a joint iPlayer service.**
The project, called 'Canvas', plans to allow viewers to stream programmes and access websites from their TVs and other devices.
- 5 Alan Rusbridger responds to Rupert Murdoch's campaign to introduce paywalls to newspaper websites.**
The Guardian's editor-in-chief claims that the newspaper industry could learn valuable lessons from trying different business models, including staying generally free while charging for specialist content.

CIRCULATION

NATIONAL DAILIES (source: ABCs)

Publication	Dec 2009	Dec 2008	% change
<i>The Sun</i>	2,862,935	2,899,310	-1.3
<i>Daily Mirror</i>	1,225,502	1,346,916	-9.0
<i>Daily Star</i>	784,958	725,671	8.2
<i>Daily Record</i>	314,753	349,235	-9.9
<i>Daily Mail</i>	2,113,134	2,139,178	-1.2
<i>Daily Express</i>	677,750	728,296	-6.9
<i>Daily Telegraph</i>	703,249	824,244	-14.7
<i>The Times</i>	521,535	600,962	-13.2
<i>Financial Times</i>	400,827	435,319	-7.9
<i>The Guardian</i>	300,540	343,010	-12.4
<i>The Independent</i>	186,940	200,242	-6.6

A combined weekly circulation of over 80 million for all national newspapers remains a robust figure. However, the medium continues to see a slow month-on-month, year-on-year decline in circulation. Over the last six months, the *Daily Telegraph* and *The Times* have reported significantly lower circulation figures compared to previous years. Within the Sunday market, *Daily Star Sunday* is the only paper to see its circulation continue to grow. The *Sunday Times* has also held its position in a difficult market.

NATIONAL SUNDAYS (source: ABCs)

Publication	Dec 2009	Dec 2008	% change
<i>News of the World</i>	2,791,773	2,987,730	-6.6
<i>Sunday Mirror</i>	1,113,310	1,195,711	-6.9
<i>The People</i>	532,680	592,306	-10.1
<i>Sunday Mail</i>	386,920	440,088	-12.1
<i>Daily Star Sunday</i>	353,249	342,019	3.3
<i>Mail on Sunday</i>	2,000,473	2,060,731	-2.9
<i>Sunday Express</i>	590,596	638,556	-7.5
<i>Sunday Times</i>	1,113,195	1,155,589	-3.7
<i>Sunday Telegraph</i>	525,088	597,934	-12.2
<i>The Observer</i>	351,019	420,323	-16.5
<i>Independent on Sunday</i>	155,460	163,545	-4.9

REGIONALS (source: ABCs)

Top five daily titles	Jan Jun 2009	Jan Jun 2008	Year on year % change
<i>Manchester Evening News</i>	165,238	161,545	2.29
<i>West Midlands Express and Star</i>	128,836	138,116	-6.72
<i>Liverpool Echo</i>	92,093	102,488	-10.14
<i>Aberdeen Press and Journal</i>	77,006	80,136	-3.91
<i>Belfast Telegraph</i>	68,024	75,964	-10.45

Regional press circulations have also shown a decline. This may be attributed to the continued growth in online audiences and media fragmentation. Recent marketplace developments include the *Manchester Evening News* adopting a paid/free model. The newspaper's Monday to Wednesday editions are now paid for, as the vast decline in classified revenues made it impossible to fund a free model across five days. Although total circulation has been on the increase, this can now only be applied to its Thursday and Friday free editions.

MONTHLIES (source: ABCs)

Publication	Jan Jun 2009	Jul Dec 2008	Period on period % change	Year on year % change
Women's monthlies total	3,296,905	3,439,413	-4.1	-5.4
Men's monthlies total	718,173	852,963	-15.8	-17.6

(All figures are UK actively purchased)

The women's monthly sector is down by 4% period on period and 5% year on year. The biggest drops are for *Marie Claire*, *Easy Living*, *She* and *Psychologies*. Both *Red* and *Elle* have performed well and *Good Housekeeping* continues to lead the older end of the market. Multipacking of magazines and cut-price subscriptions have been prominent in 2009, with *Glamour*, *Cosmopolitan*, *Marie Claire*, *Elle* and *InStyle* all offering deals at £1 per issue.

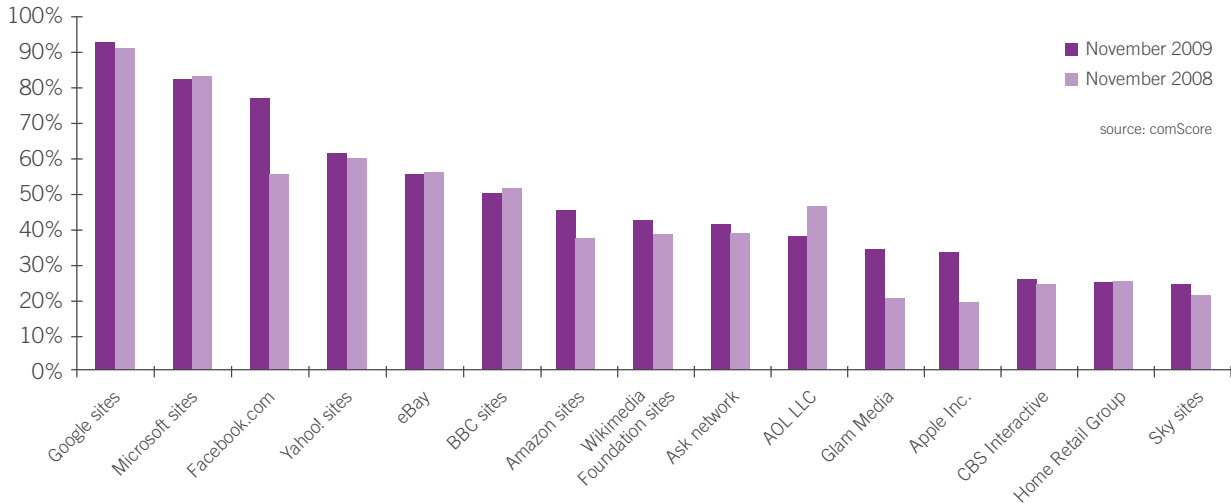
In the men's sector, fitness titles have been faring well, however lifestyle magazines are suffering large circulation declines. *Men's Health* has leapfrogged *FHM* to become the highest-circulating men's monthly for the first time.

4.3m

Unique monthly visitors to Twitter have increased from 121,000 in November 2008 to 4.3 million in November 2009 (source: comScore, November 2009)

MEDIA TRENDS

DIGITAL: YEAR ON YEAR ONLINE ALL ADULT AUDIENCE REACH



RADIO (source: Rajar)

Top 20 stations/groups	Reach (000s) Sep 2009	Reach (000s) Jun 2009	Reach (000s) Sep 2008	Year on year %	Quarter on quarter %
BBC Radio 2	13,622	13,424	13,061	4.3	1.5
BBC Radio 1	11,112	11,342	10,871	2.2	-2.0
BBC Radio 4	10,218	9,999	9,448	8.1	2.2
BBC Radio 5 Live	6,390	6,415	5,830	9.6	-0.4
Classic FM	5,445	5,717	5,542	-1.8	-4.8
talkSPORT	2,474	2,405	2,313	7.0	2.9
BBC Radio 3	2,192	2,021	1,947	12.6	8.5
Magic 105.4	2,009	2,054	1,885	6.6	-2.2
Heart 106.2 FM London	1,893	1,897	1,781	6.3	-0.2
95.8 Capital FM	1,818	1,952	1,590	14.3	-6.9
Absolute Radio (total)	1,587	1,691	2,348	-32.4	-6.2
Kiss 100 FM	1,563	1,784	1,531	2.1	-12.4
The Hits	1,151	1,243	1,597	-27.9	-7.4
Galaxy Yorkshire	1,014	993	977	3.8	2.1
5 Live sports extra	963	676	776	24.1	42.5
Smash Hits	961	1,155	1,003	-4.2	-16.8
Xfm (total UK)	934	1,004	861	8.5	-7.0
LBC 97.3	907	787	647	40.2	15.2
BBC Radio 7	884	834	887	-0.3	6.0
Heart 100.7	791	838	781	1.3	-5.6

The BBC dominates the airwaves with the top four stations. BBC Radio 2 is the biggest station in the UK, reaching 13.6 million listeners on a weekly basis. The largest commercial radio format comes in the form of Classic FM, but sport is also a big winner – with both talkSPORT and 5 Live sports extra benefiting from the start of the football season.

The rebranding of Virgin to Absolute Radio has been disappointing, with the biggest year-on-year decline. Big-name presenters are expected to be announced in an attempt to gain favour. Magic 105.4 is the largest independent local radio station, and leads the way in terms of reach in London with over 2 million listeners.

TV (source: BARB) Data cannot be reproduced without permission.

Channel	Average weekly viewing per person (hrs.mins)			Share of total viewing (%)		
	Dec 09	Nov 09	Oct 09	Dec 09	Nov 09	Oct 09
BBC 1	5:52	5:38	5:16	20.6	20.2	20.1
BBC 2	2:00	1:51	1:47	7.0	6.6	6.8
ITV 1 (incl. GMTV)	5:02	5:22	4:48	17.8	19.2	18.3
Channel 4/S4C	1:44	1:38	1:31	6.1	5.9	5.8
Five	1:13	1:19	1:13	4.3	4.7	4.7
Total terrestrial	15:50	15:49	14:34	55.8	56.6	55.6
Total digital	12:20	11:58	11:27	43.5	42.8	43.7

Despite the internet's onslaught and media fragmentation, TV is still the public's favourite pastime. All channels are enjoying healthy increases in viewing, and the hours that people dedicate to the TV set have remained remarkably consistent over many years.

TOP FIVE DIRECTGOV SEARCH TERMS

JOBS 47,414

INCOME SUPPORT 22,020

STUDENT FINANCE 16,817

DVLA* 12,809

SORN** 9,167

(Number of searches for the quarter October to December 2009)

*Driver and Vehicle Licensing Agency

**Statutory Off Road Notification

Directgov

Public services all in one place

1.86m

1,862,000 adults aged 15+ in Great Britain regularly read a blog (source: TGI, 2010)

COI NEWS IN BRIEF

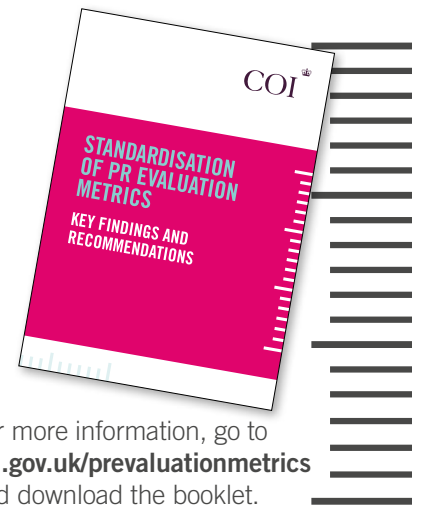
COI helps make PR evaluation simpler

COI began a consultation process last year to establish standardised metrics for PR media evaluation.

The response from the consultation confirmed that there is widespread recognition of the importance of standardising metrics. Establishing a consistent approach to the choice of metrics and how these should be calculated will make it easier to compare results across PR campaigns and other marketing disciplines.

The standards identified in the consultation document are one of the pillars of COI's much wider Holistic Evaluation Initiative, which will measure campaign effectiveness across all channels using hard data.

The standardisation of metrics is crucial in helping to ensure accurate measurement and to benchmark results for future campaign planning and evaluation, especially in the current 'more for less' climate.



For more information, go to coi.gov.uk/prevaluationmetrics and download the booklet.



A more flexible way of working with COI

From 1 April 2010, clients will have two options for how they work with COI: they will be able to choose a procurement-only service or a managed service.

There are two exceptions to this new offer – media buying and recruitment advertising. The flexible choice will give clients access to the very best suppliers in compliance with EU procurement regulations.

For more details on what these services will mean for you, contact marketing@coi.gsi.gov.uk

COI launches 'Big Thinkers' blog

COI has launched a new external-facing blog under the banner 'Big Thinkers'. The blog explores the changing media landscape as well as current issues in government communications, including the challenge of behaviour change.

Big Thinkers has already provided an opportunity for the industry's leading thinkers, such as Professor John

Naughton, Alan Rusbridger and Martha Lane Fox, to share their take on the latest developments in communications.

Mark Cross, COI blog editor, says: "This blog provides an opportunity for everyone in government communications and beyond to contribute ideas that will help to make public sector communications more effective, stimulated by the views of

key industry figures. Everyone can add value to the conversation, which we hope will benefit communicators across the Government Communications Network."

To read the blog and contribute, go to coi.gov.uk/blogs/bigthinkers

To provide feedback, unsubscribe or subscribe to **the mix**, change your contact details or request alternative formats, please contact themix@coi.gsi.gov.uk