

Forrest Group Limited
City Screen Research
Renfield Street Glasgow

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1.0 Introduction

This report details the findings to emerge from a programme of research carried out by Lowland Market Research on behalf of Forrest Group Ltd.

1.1 Methodology

Lowland Market Research interviewed 400 respondents at different locations in Glasgow City Centre between Monday 20th February and Sunday 26th February 2006. Locations were in the proximity to Bath Street, West regent Street, George Street, St Vincent Street and Gordon Street.

1.2 Sampling Accuracy

All sample surveys are subject to a degree of random error. It has become customary to provide an indication of the error margin by calculating the 95% confidence intervals for a simple random sample of the same size. These are provided in the table below. The magnitude of the error depends on the number of completed questionnaires and the results percentage.

95% Confidence Intervals

Number of Respondents	Margin of Error
400	+/-5%
250	+/-7%
100	+/-10%

Note: The table shows the 95% confidence interval, sometimes called a margin of error. The table has been calculated on the basis of simple random sampling.

The table below provides examples of actual responses and how the margins of error may affect the results.

	Number of respondents	Margin of error	Variance
Have you seen Sky images on the City Screen recently	400 respondents, - 248 state yes (62%)	+/-5%	57% to 67%

1.3 Interviewing Profile

Lowland Market research conducted 400 face to face interviews with a cross section of people in Glasgow City Centre. Interviews were conducted each day of the week and at a variety of different times of the day.

Interviews (Day of the week)

Day of Week	% of Interviews
Monday	15%
Tuesday	16%
Wednesday	15%
Thursday	16%
Friday	16%
Saturday	17%
Sunday	7%

Interviews (Time of Day)

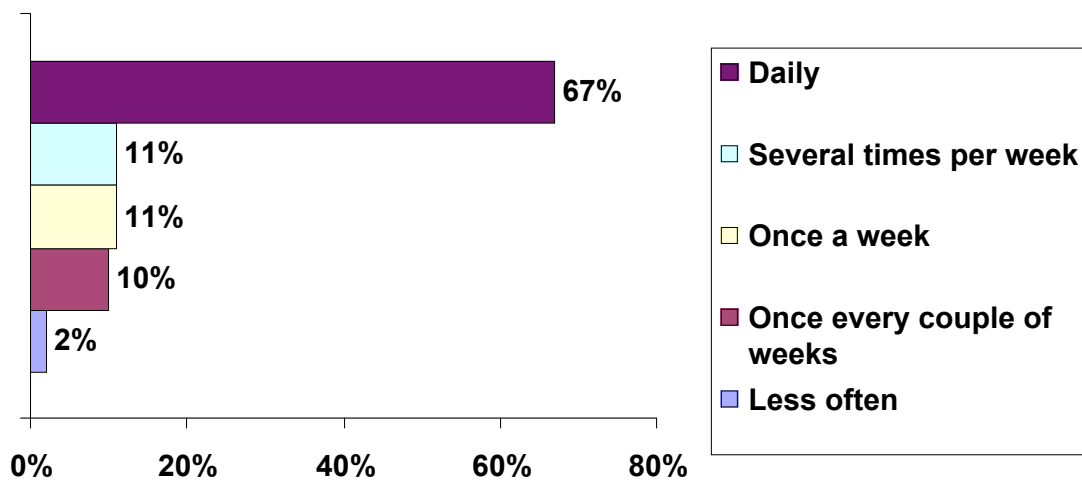
Day of Week	% of Interviews
10am to 12 noon	16%
12 noon to 2pm	29%
2pm to 5pm	29%
5pm to 7pm	11%
7pm to 10pm	16%

2.0 Research Outputs

Just over two thirds of all respondents indicated that they came into Glasgow City centre on a daily basis. A further 22% came to the city centre once a week or more often. Ten percent came to the city centre once every couple of weeks and only 2% came to the city centre less often than that.

“How often do you come to Glasgow City Centre?”

Daily	67%
Several times per week	11%
Once a week	11%
Once every couple of weeks	10%
Less often	2%



Lowland Market Research - Opening Comment

The outputs to the questions contained in pages 5 to 9 exhibit very high levels of positive response with reference to the CityScreen. In our experience it is very rare to see values above 70% to 75%.

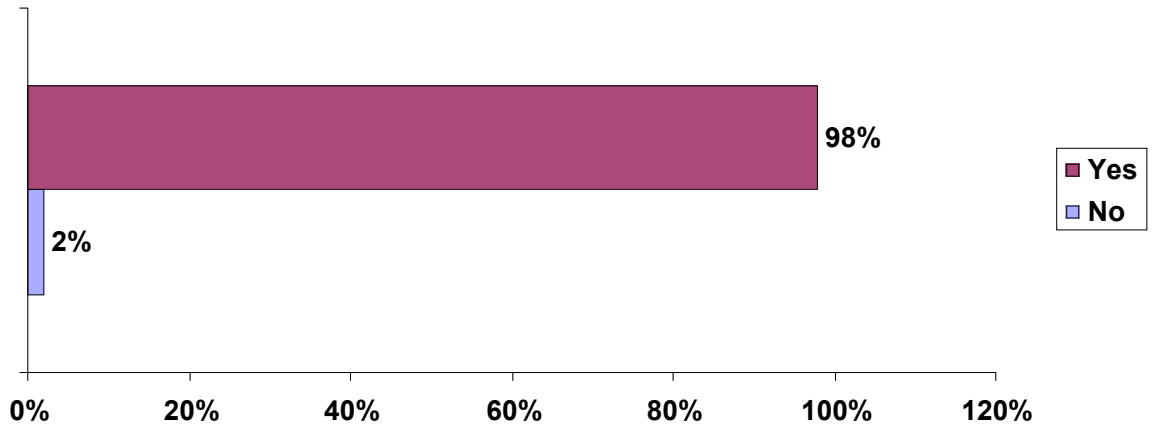
Interviewer feedback from the survey indicated that members of the public thought that the CityScreen was much different from the other advertising media that they see such as bus sides and bus shelters that they stopped and looked at the adverts.

This recurrent theme of the CityScreen being bright, bold and noticeable results in these very high levels of positive response.

KEY FINDINGS

Q1 Have you seen the digital advertising screen above Central Station?

The vast majority of respondents (98%), said that they had seen the digital advertising screen (CityScreen) above Central Station.

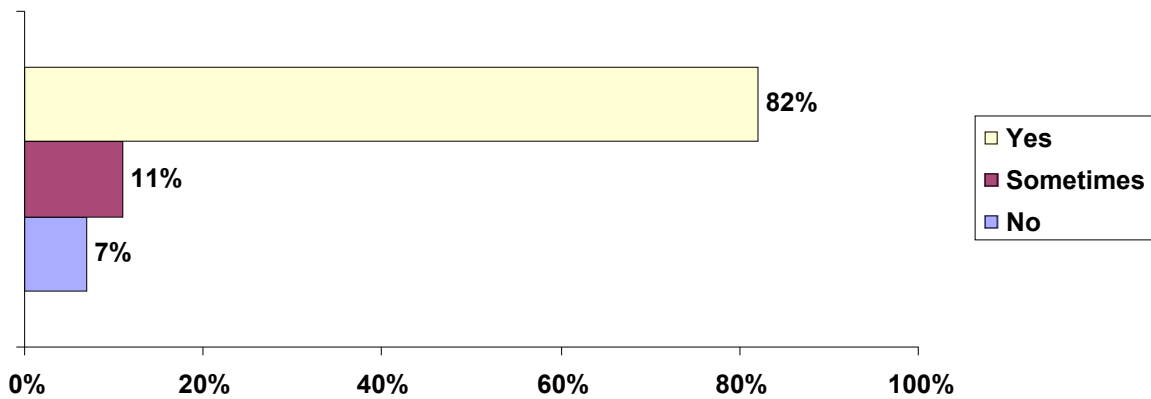


Yes	98%
No	2%

Q2. “Would you say you always see the CityScreen when you are in Renfield Street?”

Eighty two percent of all respondents said that they always see the CityScreen when they are in Renfield Street.

- A further 11% said that they sometimes see the CityScreen.
- Only 7% of respondents say that they do not always see the CityScreen when they are in Renfield Street.



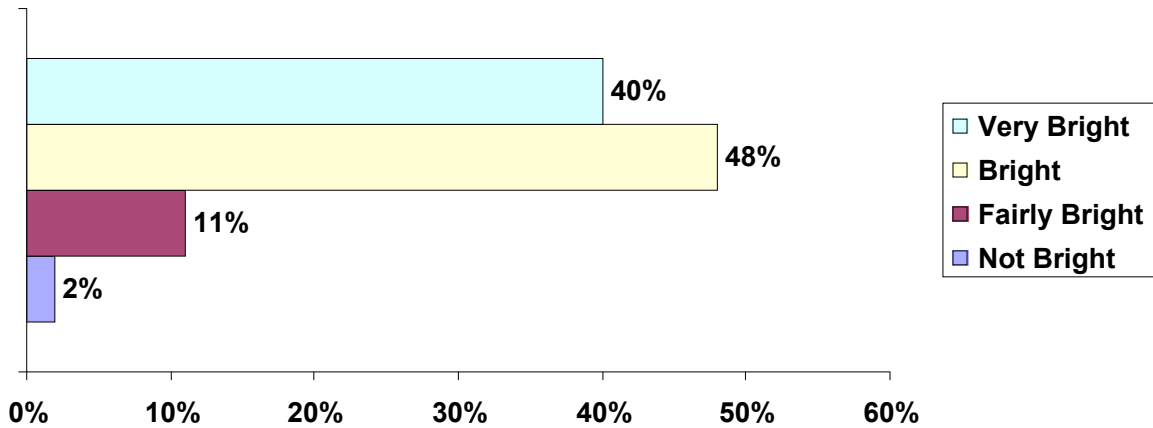
Yes	82%
Sometimes	11%
No	7%

- **“On a Friday night walking down the street it is really noticeable”**
- **“Its difficult to miss the (City) Screen”**
- **“I always look up when the advert changes”**

Q3. “How would you rate the Brightness of the CityScreen?”

An impressive 88% percent of respondents said that they would rate the CityScreen as either very bright or bright.

- A further 11% said that it was fairly bright.
- Only 2% of respondents (6 people) said that it was not bright.



Very Bright	40%
Bright	48%
Fairly Bright	11%
Not Bright	2%

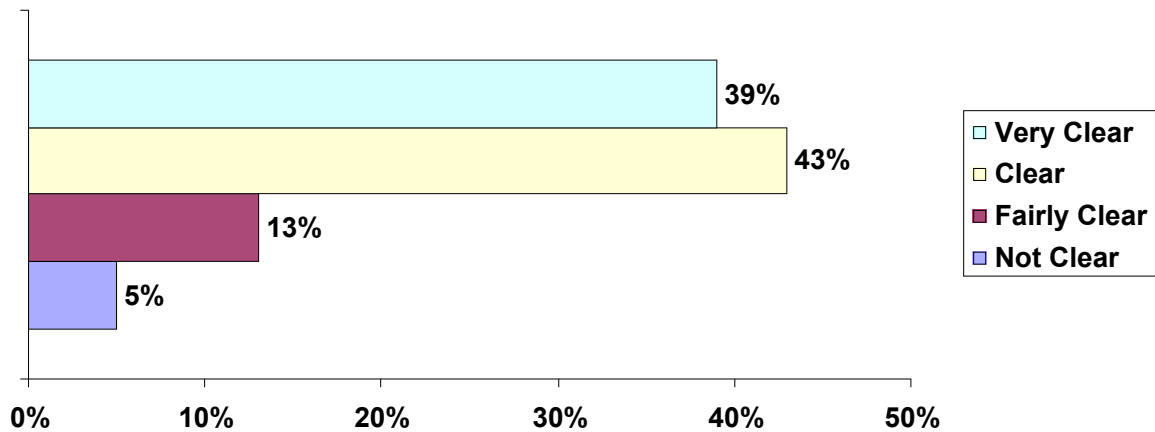
- **“Its (the CityScreen) unbelievably bright”**

Q4. "How would you rate the Quality of the Picture / Resolution of the CityScreen?"

In addition to the responses regarding the brightness of the CityScreen, the quality of the picture and resolution of the CityScreen were also asked about.

Eighty two percent of respondents said that the CityScreen was either very clear or clear.

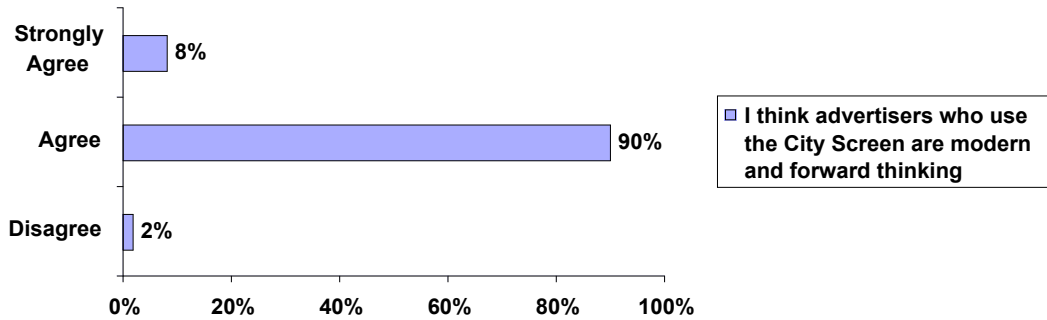
- A further 13% stating that it was fairly clear.
- Only 5% of respondents thought that the CityScreen was not clear.



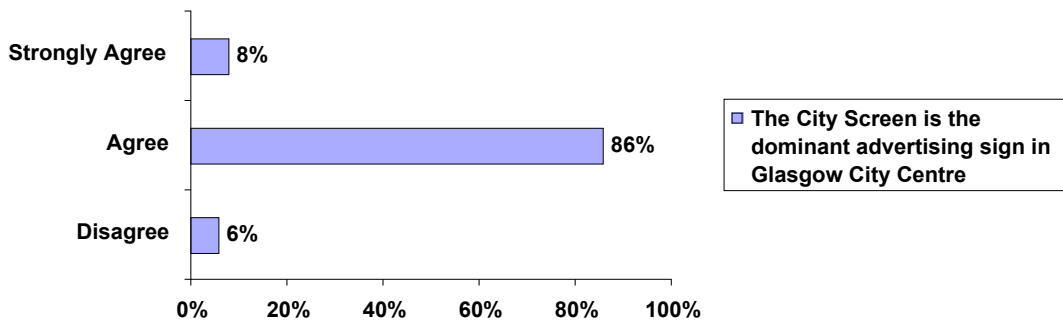
Very Clear	39%
Clear	43%
Fairly Clear	13%
Not Clear	5%

OTHER COMMENTS / FINDINGS

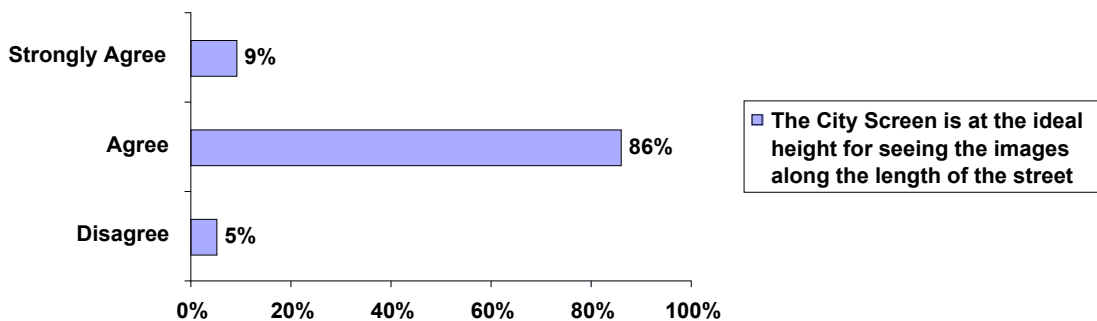
A resounding 98% of respondents indicated that they think that advertisers who use the CityScreen are modern and forward thinking.



94% of interviewees think that the CityScreen is THE DOMINANT ADVERTISING SITE in Glasgow City centre.



95% of respondents said that the CityScreen is at the ideal height for seeing the images along the length of the street.



“How much do you agree or disagree with the following statements:”

	Strongly Agree	Agree	Disagree
I think advertisers who use the City Screen are modern and forward thinking	8%	90%	2%
The City Screen is a landmark site in Glasgow City Centre	8%	89%	3%
Its very eye catching, I like the City Screen	8%	89%	3%
The City Screen is the dominant advertising sign in Glasgow City Centre	8%	86%	6%
The images on the City Screen are extremely bright and clear	8%	87%	5%
The City Screen catches your attention, its hard to miss	7%	88%	5%
I remember adverts I see on the City Screen	7%	82%	11%
The City Screen is at the ideal height for seeing the images along the length of the street	9%	86%	5%

Recall

In order to illustrate recall on the CityScreen two recent campaigns (Sky and Irn Bru) were tested for unprompted and prompted recall.

The Sky campaign ran in November / December 2005, a full 2 months before the research was conducted. With this in mind it is significant that 14% of all respondents recall the Sky advert on an unprompted basis.

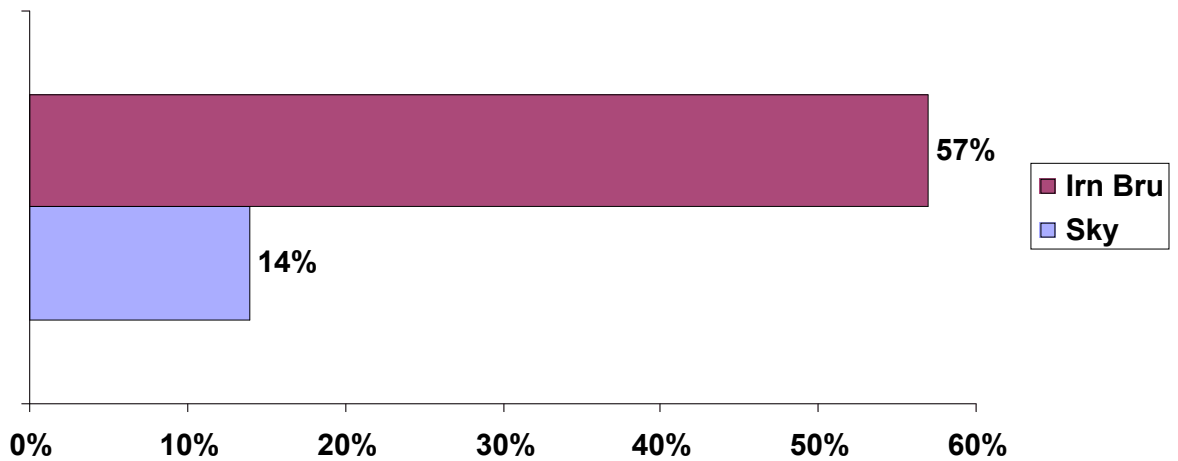
The Irn Bru campaign has had a year long presence on the CityScreen.

Unprompted Recall of Advertising Images

Respondents were asked to recall advertising they had seen recently on the CityScreen, interviewers noted if Sky and / or Irn Bru featured - this was an unprompted response. Just over half of all respondents (57%) said that they recalled advertising for Irn Bru and 14% recalled advertising for Sky.

“Thinking only of the City Screen, can you recall any advertising that has been shown on it recently.”

Irn Bru	57%
Sky	14%



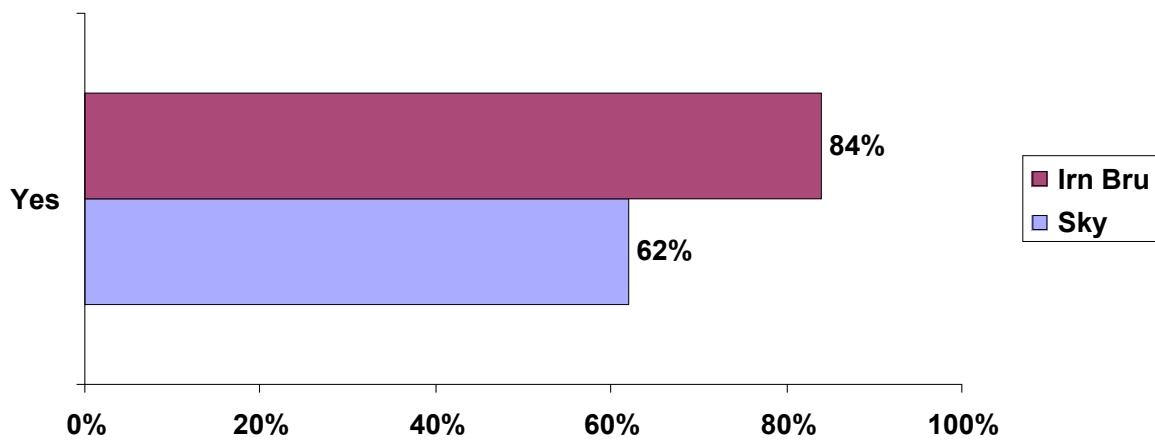
Prompted Recall of Advertising Images

Respondents were then shown images of the Irn Bru and Sky adverts which had been broadcast on the CityScreen. Colour photographs of actual CityScreen images were used providing a view of the CityScreen from Renfield Street.

On a prompted basis, 84% of respondents said that they had seen the Irn Bru image, a further 62% had seen the Sky image.

“Have you seen the following images on the City Screen?”

	Yes	No
Irn Bru	84%	16%
Sky	62%	38%



3.0 Additional Population and CityScreen Data

- Renfield Street – Average footfall – 1,760,462 people either in vehicles or pedestrians per week

- Age –

	16-24	25-34	35-44	45-54	55-64	65+
Monday	17%	10%	20%	10%	8%	13%
Tuesday	16%	10%	14%	15%	28%	22%
Wednesday	14%	19%	15%	9%	20%	22%
Thursday	18%	16%	15%	15%	12%	13%
Friday	15%	21%	13%	19%	12%	4%
Saturday	16%	19%	14%	19%	16%	13%
Sunday	4%	4%	9%	13%	4%	13%

- Frequency of viewing – 82% of respondents indicated that they always see the CityScreen when they are Renfield Street
- Dwell Time in Renfield Street will average 5 minutes. Each person will therefore see each advert at least once
- Traffic Count (Based on 2003 research)

Key Statistics

Time of Day	Total number of people in vehicles	Total number of pedestrians	Total Number of People
6am-9am	137,179	70,966	208,145
9am-12pm	152,397	133,812	286,209
12pm-3pm	139,867	213,528	353,395
3pm-5pm	115,136	106,484	221,620
5pm-7pm	173,901	193,172	367,073
7pm-3am	126,920	197,100	324,020
Average Total per Week	845,400	915,062	1,760,462

- Height of Screen – 18 metres
- Maximum Visibility Point – 1000 metres
- Minimum Visibility Point – Gordon Street (30 metres)
- Angle to street – Head on
- Share of Voice – 83%

Appendices

APPENDIX 1

Respondent Profile

Gender

Male	45%
Female	55%

Age

16-24 years	34%
25-34 years	17%
35-44 years	20%
45-54 years	17%
55-64 years	6%
65+ years	6%

Employment status

Working full time	54%
Working part time	14%
unemployed	4%
retired	6%
looking after house / family	7%
on a government training scheme	4%
in full time education	9%
sick/disabled	2%
other	1%

Socio Economic Grade

ABC1	46%
C2/DE	53%
Refused	1%

APPENDIX 2

Calculations for Share of Voice.

The share of voice has been calculated using a variety of very conservative assumptions –

- 1 Only pedestrians and drivers of vehicles will have a full unrestricted view of the CityScreen
- 2 People in Renfield Street will remain in the street either static or travelling for 5 minutes. This will enable each advert in a 4 minute cycle to have the potential to be seen at least once
- 3 The CityScreen is highly visible (88% of respondents stating that it is bright or very bright)
- 4 The image on the CityScreen changes every 20 seconds thus creating a potential prompt for people to look at it and absorb the advertising message.
- 5 Majority of people have seen and know well the CityScreen (98% of people said that they had seen the CityScreen).
- 6 People state that they remember the adverts on the CityScreen (89% say that they remember adverts they see on the CityScreen)
- 7 Competition for peoples attention regarding advertising in Renfield Street will be
 - a. Bus Side Advertising
 - b. Bus Rear Advertising
 - c. Taxi side advertising
 - d. Bus shelter advertising
- 8 People on Renfield Street will, within a 20 second period that each CityScreen advert is displayed, be able to see a maximum of 2 bus sides, 2 bus rears, 2 taxi sides and one bus shelter advert.

Using the above assumptions we would estimate that the CityScreen, on average has 83% of the share of voice in any one 20 second interval.