



Breakfast Radio:

The most important media of the day?

Bite Sized Thought Piece

2012

THE BREAKFAST CLUB

Morning time has traditionally been the realm of radio. From Tony Blackburn and the Hairy Cornflake through to Chris Evans, Christian O'Connell and Nick Grimshaw, morning has always commanded the highest daily audiences for radio stations. The most recent RAJAR results report that a massive 37.1 million adults across the UK tune into a weekday breakfast show across an average week.

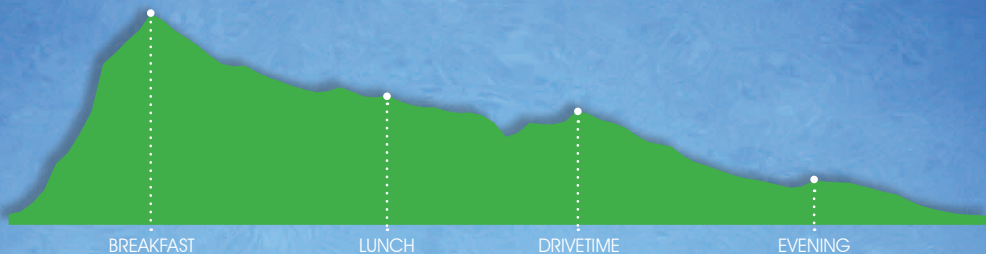
However, with today's complex, fragmented and digital media landscape the competition for attention in the morning is fierce. The Telegraph reported this year that over half of smartphone users have replaced their alarm clock with their phone and over one million people on Facebook 'Liked' the group 'the first thing I do when I wake up is check facebook'. Radio stations are no longer just competing with other radio

stations or television in the morning but now face assaults from smart phones, tablets and computers. It is becoming increasingly evident that stations need to ensure that they are fine tuned and optimised to meet complex and often difficult to understand needs of their audiences in the morning.

'I'M NOT A MORNING PERSON...'

Morning is a complex and sometimes stressful time. We all know people who are difficult to talk to before they've had that first cup of coffee, those that leap out of bed and go for an energising morning run before having a refreshing cold shower or those that are up and out of the house in less than seven minutes, having a slice of toast in the car. The trick for radio stations is to really understand the underlying psychological needs that people have in the morning and

All Radio Reach across the weekday



Source: RAJAR Q2 2012

*"When you wake up in the morning, Pooh," said Piglet at last,
"what's the first thing you say to yourself?"*

"What's for breakfast?" said Pooh. "What do you say, Piglet?"

"I say, I wonder what's going to happen exciting today?" said Piglet.

Pooh nodded thoughtfully. "It's the same thing," he said.

A.A. Milne



ensure that their stations, presenters, content and advertisers or promotions are consistently meeting these needs across all touchpoints.

Ipsos MediaCT set out to explore breakfast time, seeking to understand just these issues. What needs do people have in the morning and how does media and specifically radio, help to meet these needs and prepare people for their day? We used a framework developed by the Ipsos Censydiam Institute that helps us to map the human needs behind the choices we make. This provides the unique opportunity to look beneath the surface at the inner needs and motivation which helps clients build a more powerful connection to their consumers.

The framework is based on two tensions; the personal dimension which is about releasing emotions and letting go, versus controlling your emotions and the social dimension which is the pressure on how you relate

to others. For example some stations have presenters and music that are loud and energetic, appealing to those who need to release emotion in the morning where as others focus on local issues and foster a community feel to connect people to others. When applied in analysis the framework helps identify opportunities and market gaps based on fundamental human needs.

MORNING STRATEGIES

Through conducting structured Censydiam groups, we found that there are a number of common needs to be met to move people from their dreamy, sleep state through to being ready to start the day. Here are a few of them:

- Cocoon me: Some want a gentle awakening in a safe and familiar environment with time to relax and have their coffee. They want to connect with the world at their

own pace - to gradually emerge from their cocoon and face the waking world.

- Give me a kick: Others might like to go for a run, have a quick shower, listen to upbeat music and dance around while they get ready in the morning. They need invigoration and stimulation and to feel equipped to head out into the day.
- Connect me: Some people immediately wake up and reach for their mobile phone to check virtual connections. They like to ensure they are up-to-speed with all the gossip and friends' late night activities before they are ready for the day ahead.
- Arm me: Some are looking for information to get ahead. They need to check their Blackberry, get the latest news stories, or read the Financial Times to ensure they are on top of their game and are armed to succeed in their day.

While your core need will be within one segment in our framework, you can touch on other needs throughout the morning. For example, your primary need may be connecting you with others. You wake up, reach for your phone and check social network sites and text messages. After a shower and listening to your favourite music radio station, you check your Blackberry for work emails while eating breakfast. You need a bit of a kick and to find out what's going on in the world, but your core need is about feeling connected.

HOW DOES RADIO HELP MEET OUR NEEDS IN THE MORNING?

Radio is the ideal morning companion as it permeates the subconscious and dreamlike state. As a single sensory media, it allows the listener to absorb the audio and continue using imagination to picture

We have many needs in the morning and they all help us re-emerge in to the waking world



what is happening beyond the speaker and within the radio community being engaged with. Radio accesses imagination, whether soft and mellow, or vivid and chaotic. In the mornings it continues using the imagination and subconscious from your dreams and therefore eases the transition from dreamlike state into waking world.

Radio provides a bridge between this dreamlike state and reality; you might imagine talking to the DJ, argue with the points presented and sing along with your favourite song, all while starting to prepare yourself for the day ahead. Radio is felt to be real - mistakes can be made, sometimes inappropriate things are said by guests. This element of risk adds excitement and intrigue not available on other platforms. It is the combination of single sensory support from a cocoon state, and perceived realness, that separates

radio from other media in the morning, which don't manage to combine both.

We know that different stations meet different needs in the morning; some are obviously trying to address the 'give me a kick' need with invigorating music and high octane chat; others are more about showbiz gossip and banter to 'connect' people and some impart information to 'arm' people for the day. But these stations aren't always consistent because they don't necessarily understand why what they do works. Mapping brand portfolio, talent and brand touchpoints across the Censydiam map can help radio stations to ensure that they are consistently meeting a core need and so ensure a consistent brand experience for their audiences.

What is the price of inconsistencies in your approach to meeting needs? Stations can easily win or lose listeners with the wrong





approach. For example, take a radio station that meets the core needs of those who see themselves as a discerning listener, set apart from the mainstream. The main station is likely to reflect this with high brow advertisers and content. If this same station is considering becoming part of the social networking generation, then it should be looking beyond mass market Twitter and Facebook into more niche, different, and exclusive content, for example, a registered forum with specialised content.

Gigs and events should not be communicated through mass marketing, rather it is a last minute announcement for a gig in a small and intimate venue, appealing to listeners' need for exclusivity. With more radio stations starting to use apps for phones and tablets, getting content right for their target audience is key. Getting this content wrong could alienate current listeners, making them turn to another of the copious choices they have for the morning.

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Ipsos MediaCT - Winner - 2011 MRS Awards: "Best Innovation"

