

TV & Radio Audiences in Malta

Broadcasting Authority

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March 2000

Objectives

- Measure audience size of Radio stations
- Measure audience size of TV channels
- Views of Maltese on certain aspects of broadcasting
 - ◆ station preferences in respect of schedule segments
 - ◆ political broadcasts
 - ◆ new programmes

Special BA Directive for 1997 Study the last sentence was reversed for 1998

“the statistic ‘average’ at the bottom of each table for radio audiences should be worked out on the basis of 18 hours of listening per day i.e... from 6.00 a.m. to midnight...In the case of University Radio and Radju MAS the statistic should be computed for the frequency allocated to the UNI/MAS and appear as such...”

Meaning of 1%

- 1% = 3129 persons residing in Malta (whether Maltese nationals or not) aged 12 and over
- 0% < 3129 persons residing in Malta (whether Maltese nationals or not) aged 12 and over

◆ 1996 Study: aged 14 and over

◆ 1997 - 2000 Studies: aged 12 and over

Sample Profile: Gender

Age Group	Total	Male	Female
	%	%	%
12-17	11.2	11.4	11.0
18-30	21.0	21.4	20.5
31-50	37.1	37.1	37.0
51-65	18.2	18.6	17.8
over 65	12.6	11.4	13.7
TOTAL	100.0	100.0	100.0
N=	1001	493	508
	100	49.0	51.0

Sample Profile: Socio-Economic

Socio-Economic Group	Total	AB	C1	C2	DE
N=	1001	114	338	165	384
	%	%	%	%	%
12-17	5.3	13.9	13.9	13.9	9.4
18-30	20.2	28.4	13.3	13.3	17.4
31-50	36.0	35.2	43.6	43.6	37.2
51-65	25.4	13.6	16.4	16.4	20.3
over 65	13.2	8.9	12.7	12.7	15.6
TOTAL	100.0	100.0	100.0	100.0	100.0

Who Listens to Radio

	Total	Male	Female
N=	1001	493	508
	%	%	%
Listen to the Radio	76.6	77.9	75.4
Do Not Listen to the Radio	23.4	22.1	24.6

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	768	384	384
	%	%	%
Varies Considerably	4.9	4.2	4.2
One Hour	27.2	29.4	25.0
Two Hours	19.3	20.6	18.0
Three Hours	9.6	7.3	12.0
Four to Nine Hours	9.8	9.1	10.4
Ten Hours and more	29.9	29.6	30.4

Where is Radio Listened to

	Total	Male	Female
N=	747	384	384
	%	%	%
NA	1.2	0.5	1.8
At home	77.0	66.4	87.5
At work	19.7	28.9	10.4
In the car	27.5	37.8	17.2

Who watches TV

	Total	Male	Female
N=	1001	493	508
	%	%	%
Watch TV	97.1	97.2	97.0
Do Not watch TV	2.9	2.8	3.0

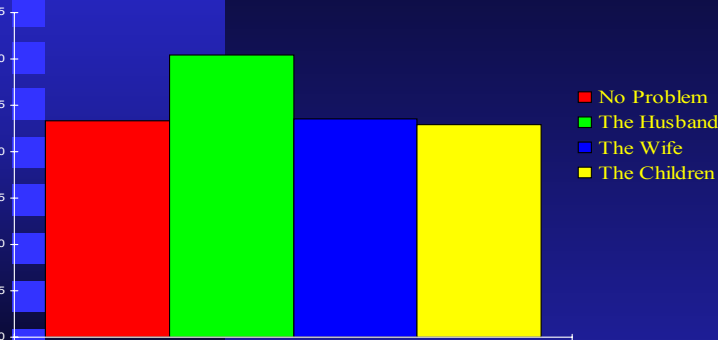
Average No. of Hours TV is watched

	Total	Male	Female
N=	986	479	493
	%	%	%
Varies Considerably	1.7	1.3	2.2
One Hour	14.6	15.7	13.6
Two Hours	30.0	31.5	28.6
Three Hours	23.6	23.4	23.7
More than three Hours	30.1	28.1	31.9

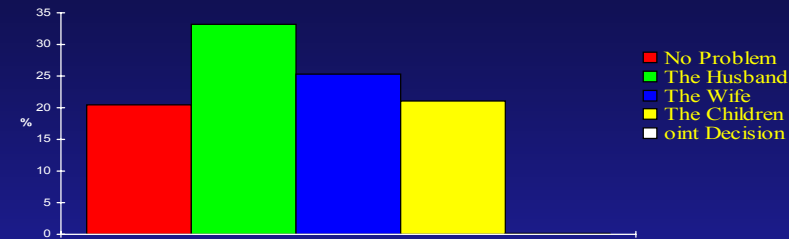
Where TV is Watched

	Total	Male	Female
N=	986	479	493
	%	%	%
Sitting Room	40.1	41.5	38.7
Dining Room	5.3	5.4	5.3
Kitchen	24.3	21.3	27.2
Bedroom	28.5	29.0	28.0
Another Place	1.7	2.7	0.8

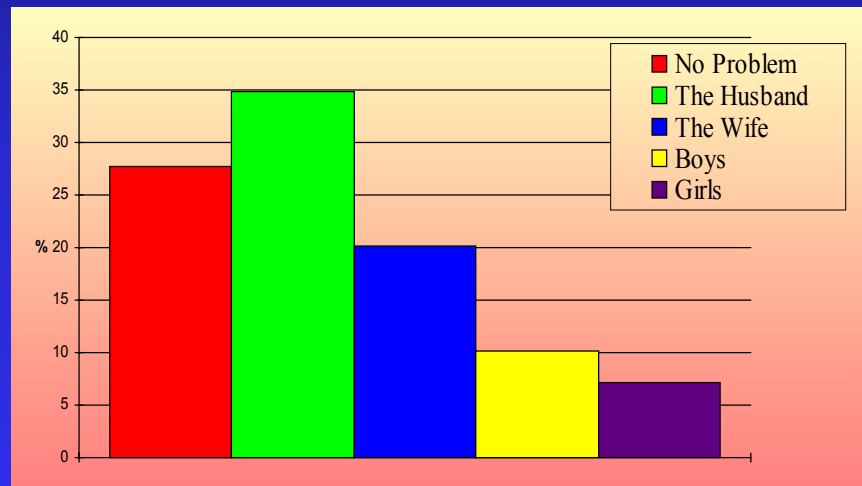
Who decides on Choice of Channel (1999 - 2000)



March 1999



October 1999



March 2000

Cable TV Facilities

	Total	AB	C1	C2	DE
N=	1001	114	38	65	384
	%	%	%	%	%
Connected	54.3	68.4	58.0	50.9	48.4
Reception	22.7	20.2	22.8	21.8	23.7
Basic	22.0	34.2	21.6	20.6	19.3
TV Plus	9.7	14.0	13.6	8.5	5.5
<i>Movie Channel</i>	<i>12.3</i>	<i>14.1</i>	<i>14.3</i>	<i>10.7</i>	<i>10.2</i>
<i>Sports Channel</i>	<i>16.4</i>	<i>14.1</i>	<i>18.9</i>	<i>11.9</i>	<i>16.7</i>

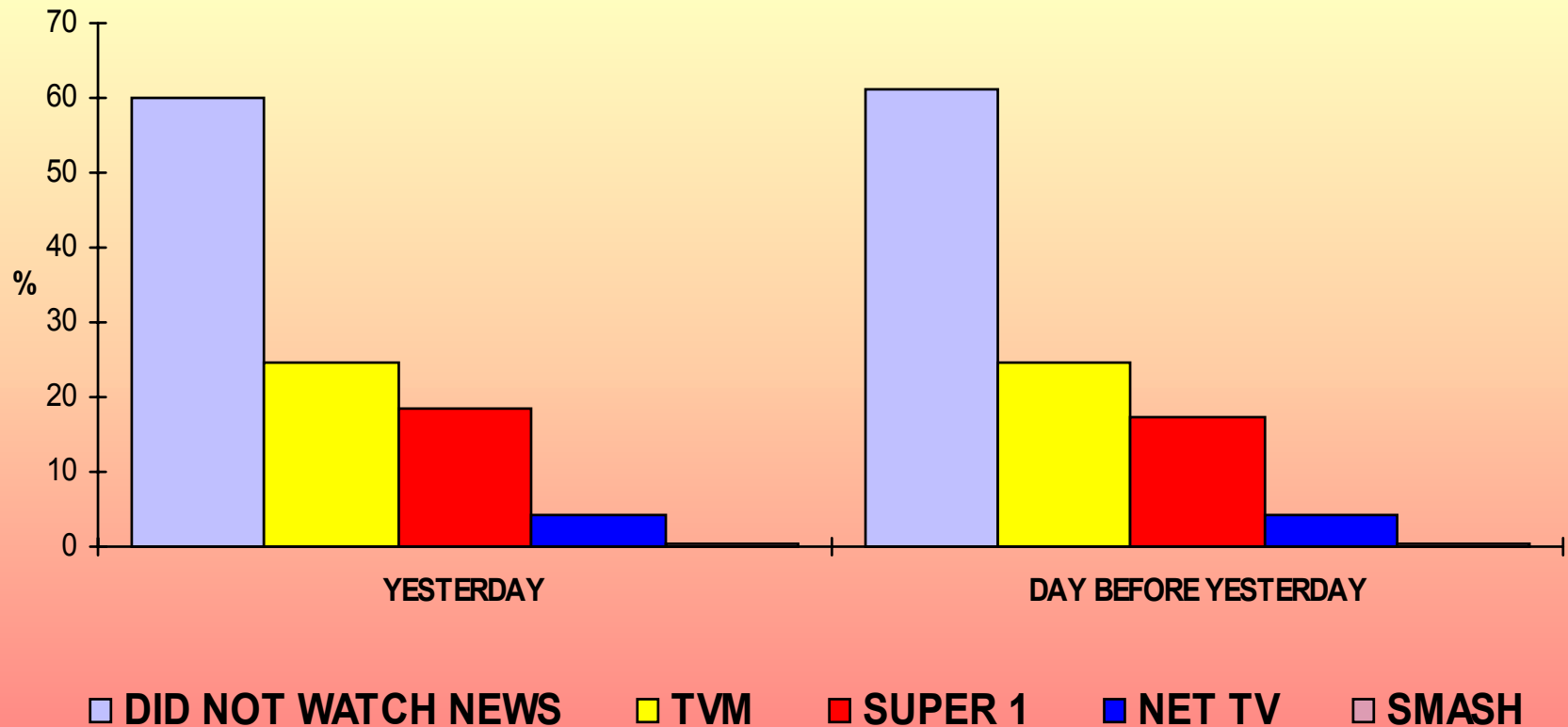
Preferred Source for Local News

	Total	Male	Female
N=	1001	493	508
	%	%	%
No Preference	2.6	3.4	1.8
Radio	14.2	14.2	14.2
TV	72.6	70.8	74.4
Newspaper	7.4	8.1	6.7
From Other Persons	3.2	3.4	3.0

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	493	508
	%	%	%
No Preference	3.2	3.7	2.8
Radio	11.3	11.8	10.8
TV	76.1	74.8	77.4
Newspaper	6.7	6.9	6.5
From Other Persons	2.7	2.8	2.6

Local TV Stations on which News was Watched on 2 Days Prior to Interview



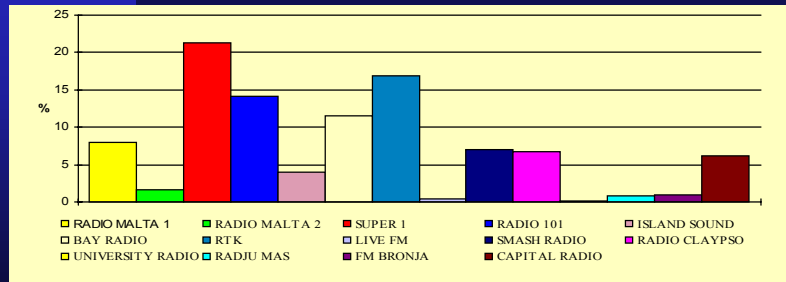
General Preference for Programme Sectors (Radio: 1998 – 2000)

PROGRAMME SECTOR	%	%	%	%
	1998	1999 (March)	1999 (Oct)	2000 (March)
Music	87.2	87.4	74.6	86.5
Local News	84.5	80.5	73.0	76.6
Foreign News	77.1	76.9	63.7	74.6
Discussions	67.6	59.7	56.0	57.7
Current Affairs	56.8	54.3	37.1	57.3
Religion	53.3	47.1	36.3	47.1
Health/Beauty/Home/Law	54.5	51.0	37.8	46.6
Culture	45.8	44.4	25.8	37.8
Sports	48.2	37.2	25.4	36.8
Novels/Plays	49.5	40.7	28.5	35.7
Money/Business	31.7	25.2	13.5	23.4
Women	NA	NA	NA	21.6
Children	30.2	25.8	13.3	20.1

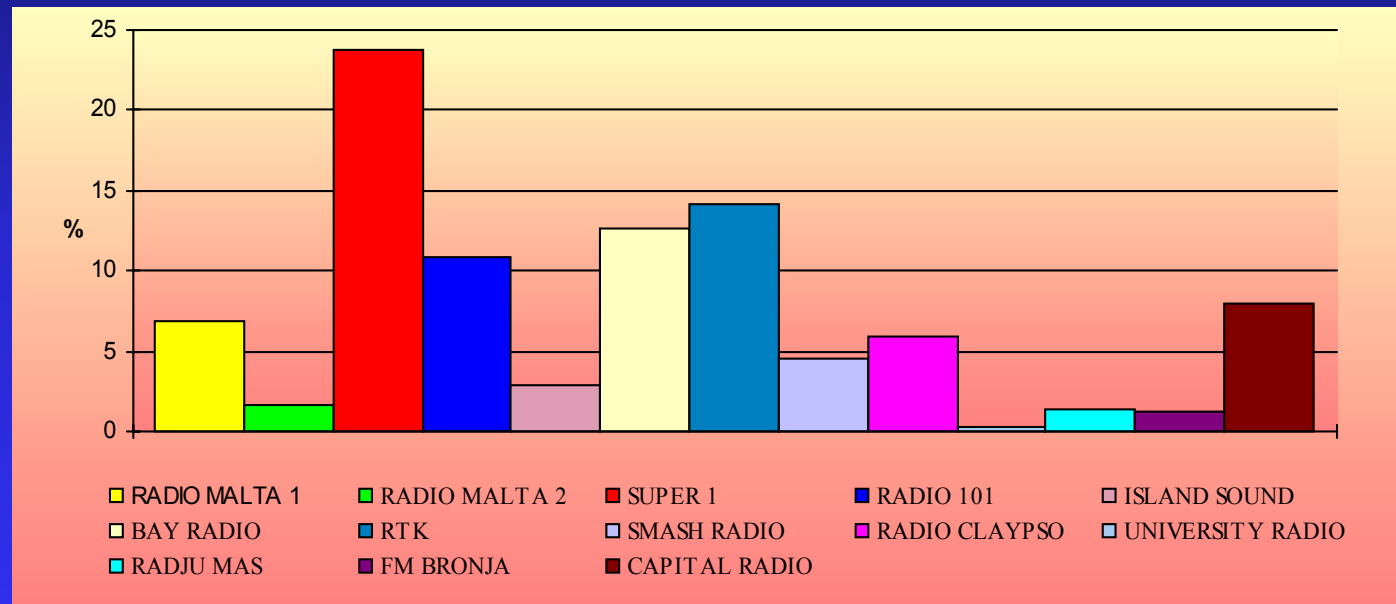
General Preference for Programme Sectors (TV: 1999 - 2000)

Programme Segments	1999 (March)	1999 (October)	2000 (March)
Local News	93.1	88.0	90.6
Foreign News	90.7	84.4	90.2
Feature Films	77.9	73.0	80.9
Discussions	73.8	68.6	71.5
Weather	76.4	65.4	70.0
Documentaries	73.5	59.1	66.6
Sports	62.7	56.2	60.7
Quizzes / Game Shows / Variety Programmes	66.8	59.9	60.4
Plays	46.0	51.1	54.8
Serials/Soap Operas	66.7	47.5	53.0
Current Affairs	53.0	40.6	45.5
Religion	48.8	39.0	42.1
Music Video-Clips	44.1	37.6	40.8
Art & Culture	44.7	33.7	38.2
Women's Programmes	43.4	37.2	36.3
Children's Programmes	43.5	37.3	31.1
Business & Finance	23.7	24.0	27.0

Overall Performance as 'Best' Radio Station



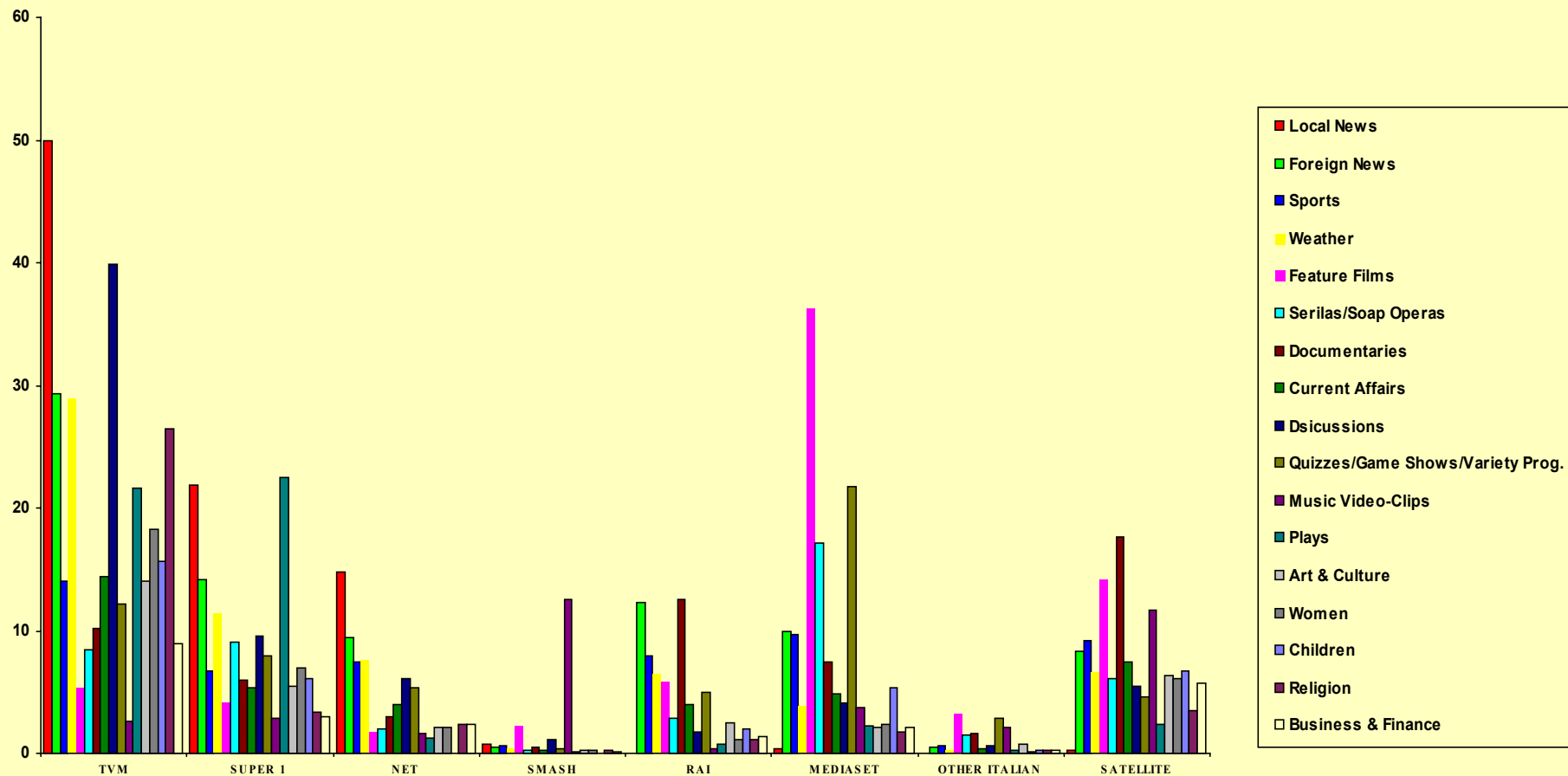
October 99



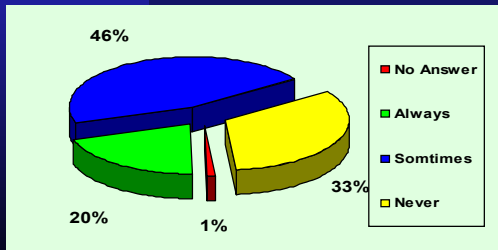
March 2000

BA Audience Audit March 2000

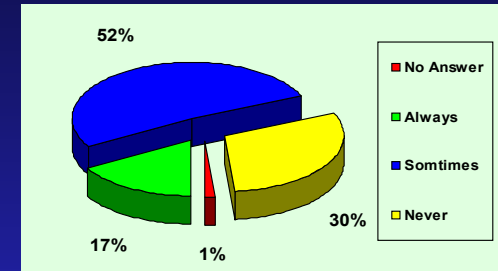
Comparative Interest in Different Programme Segments TV Channels



Interest in Political Broadcasts (1999 – 2000)

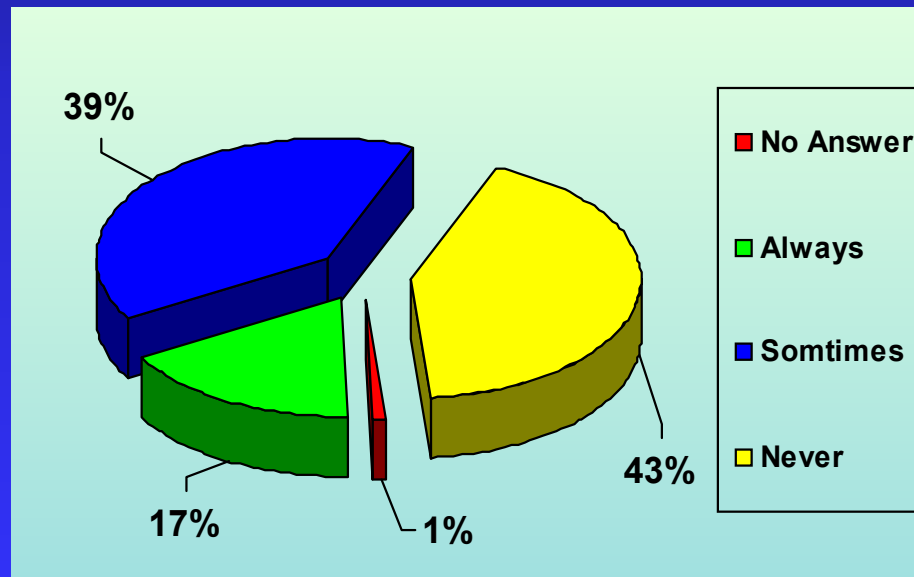


March



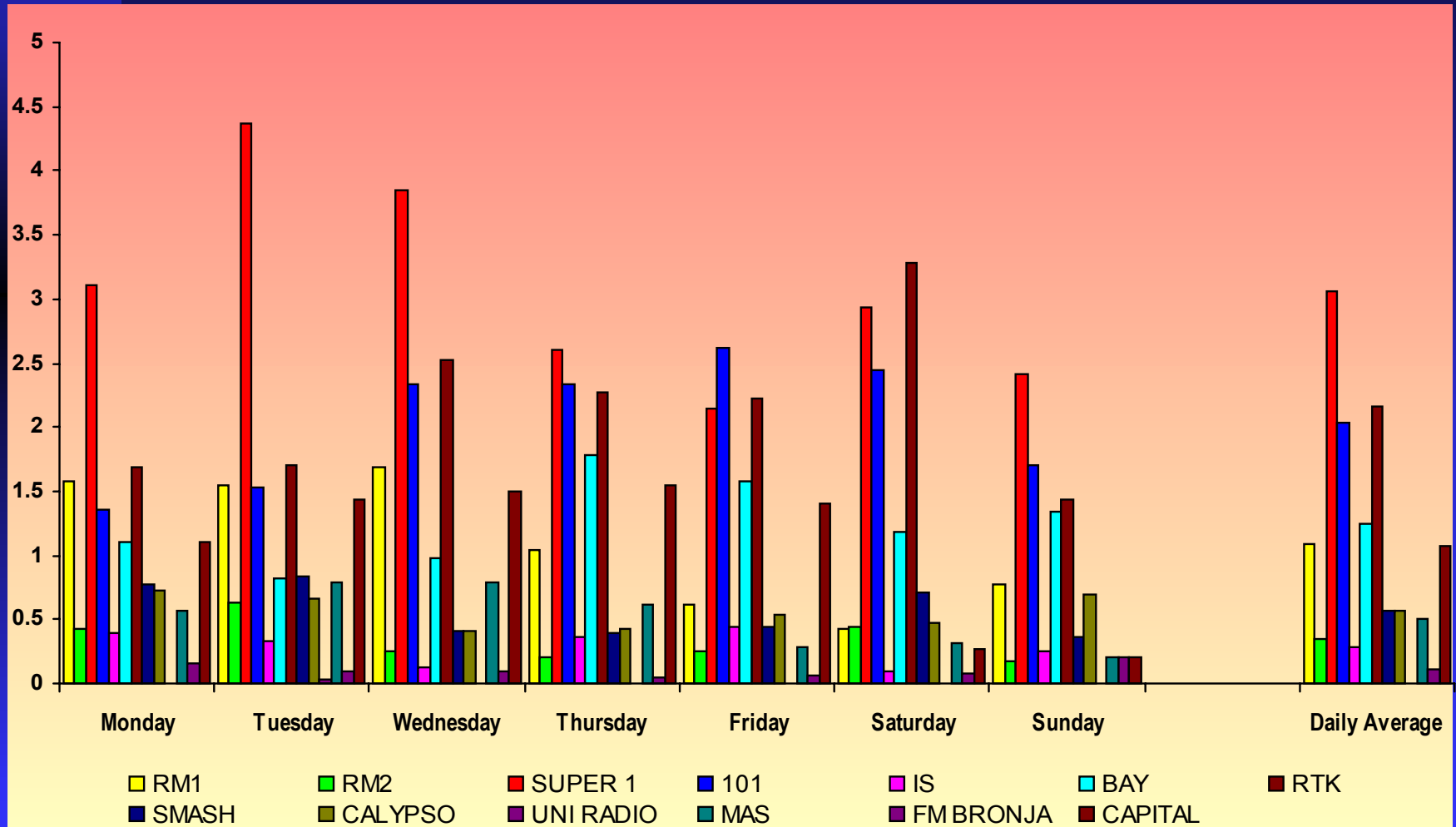
October

March 2000

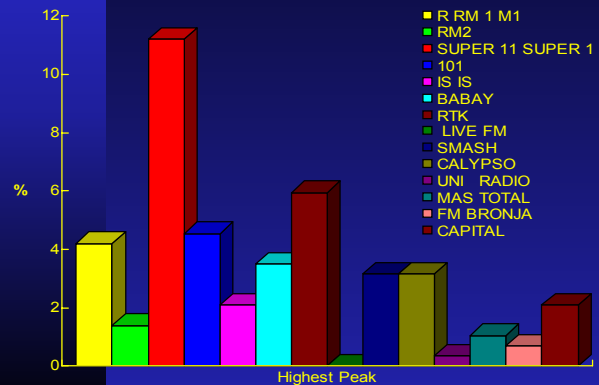


Daily Radio Average Audience Share

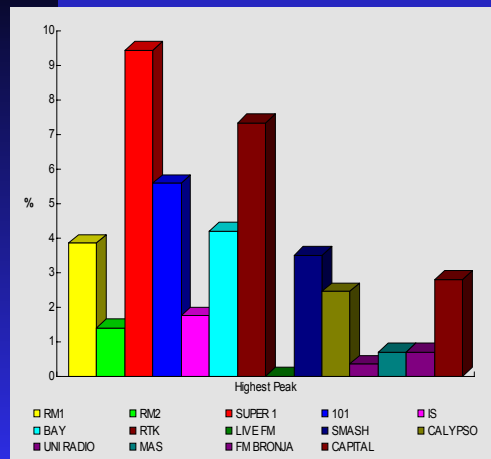
(Basis: Total No. of Transmission Hours)



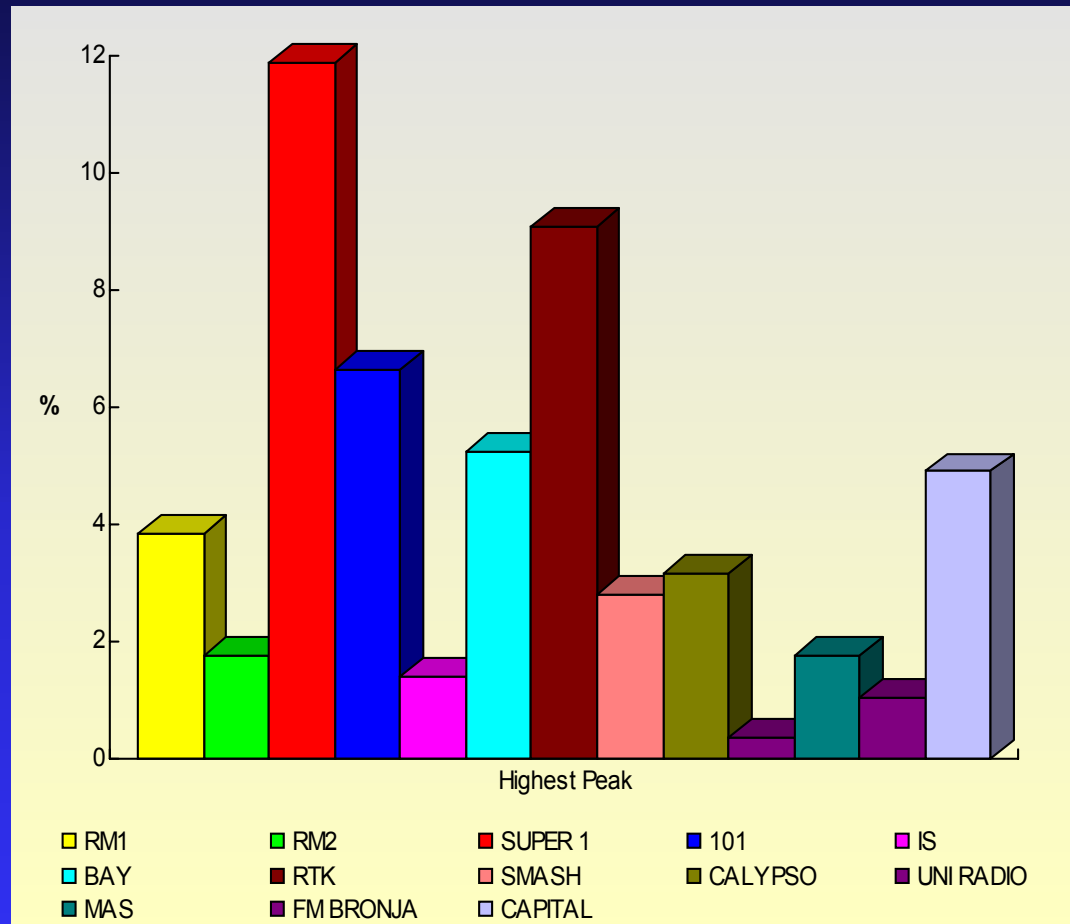
Highest Radio Station Peak Audience Share



March 1999



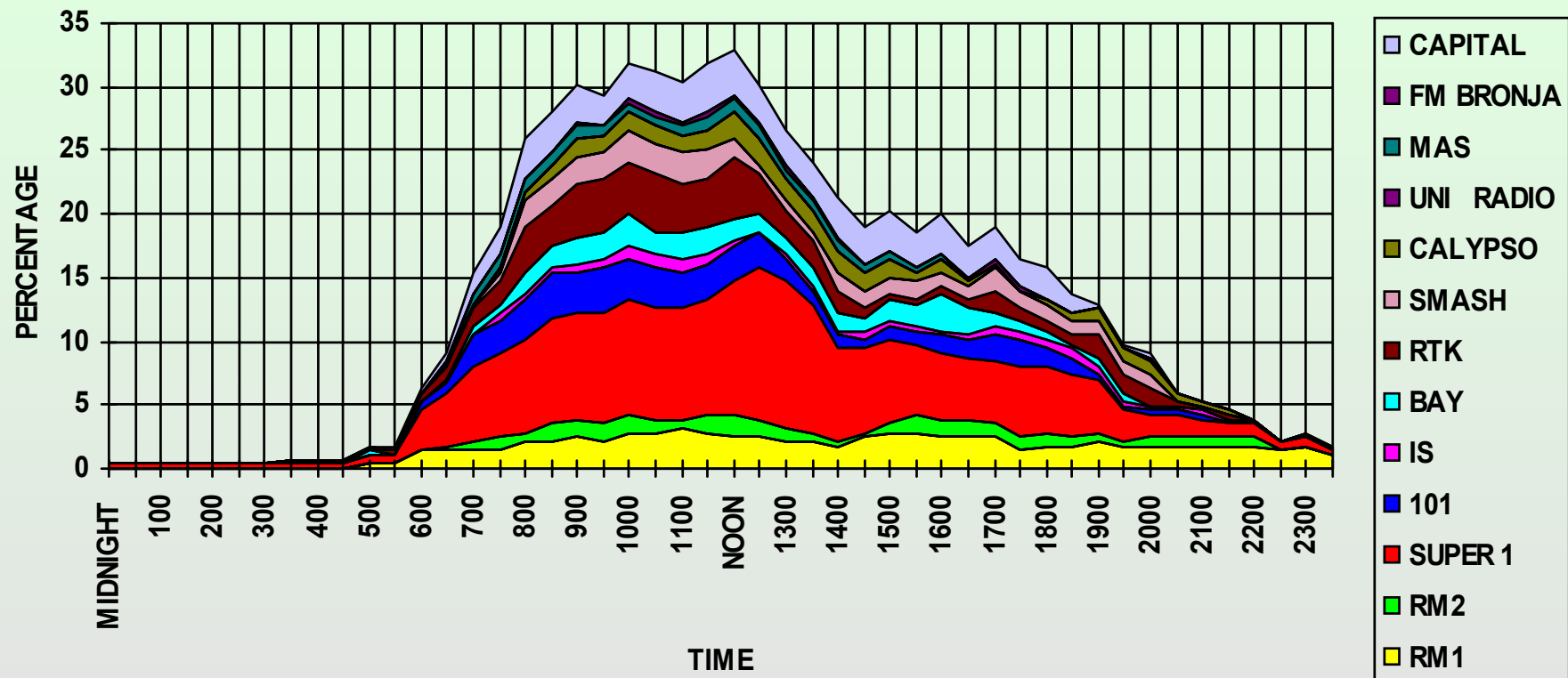
October 1999



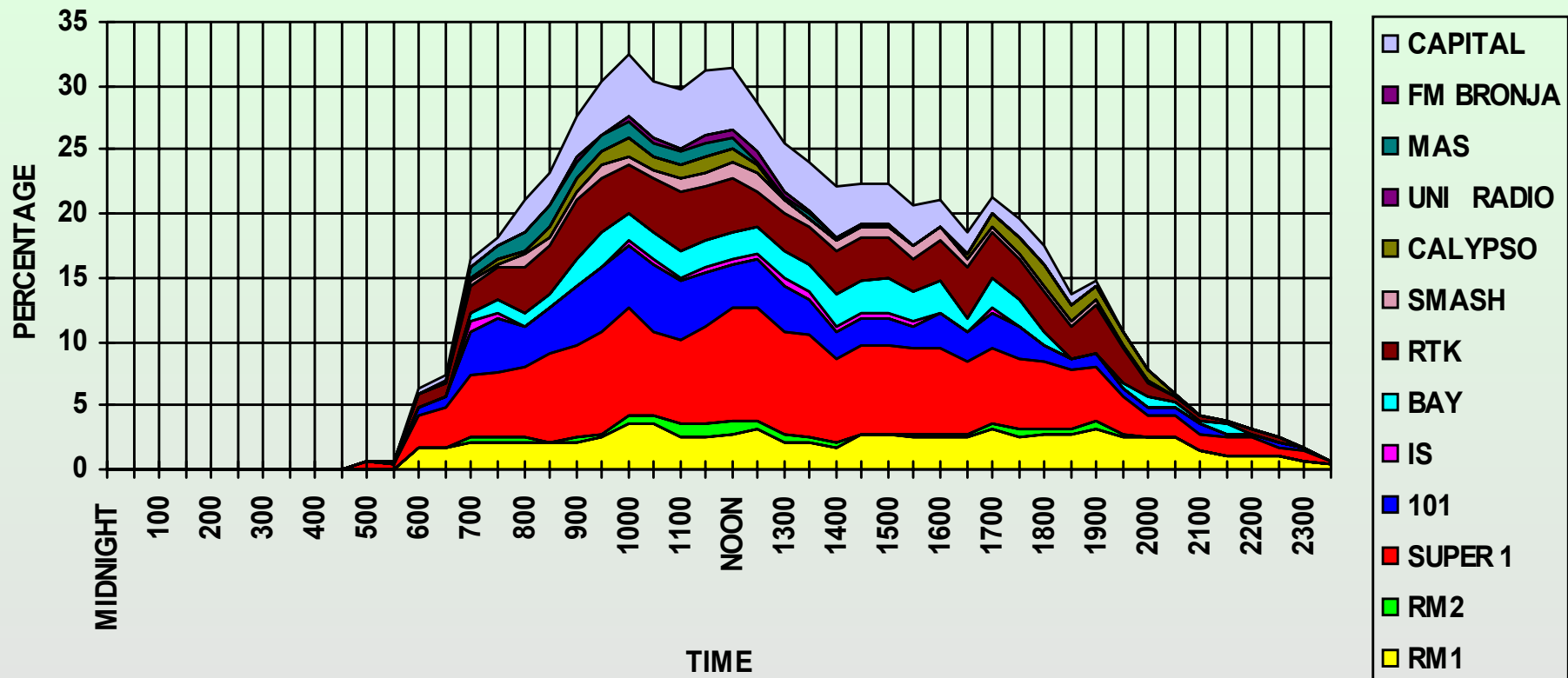
March 2000



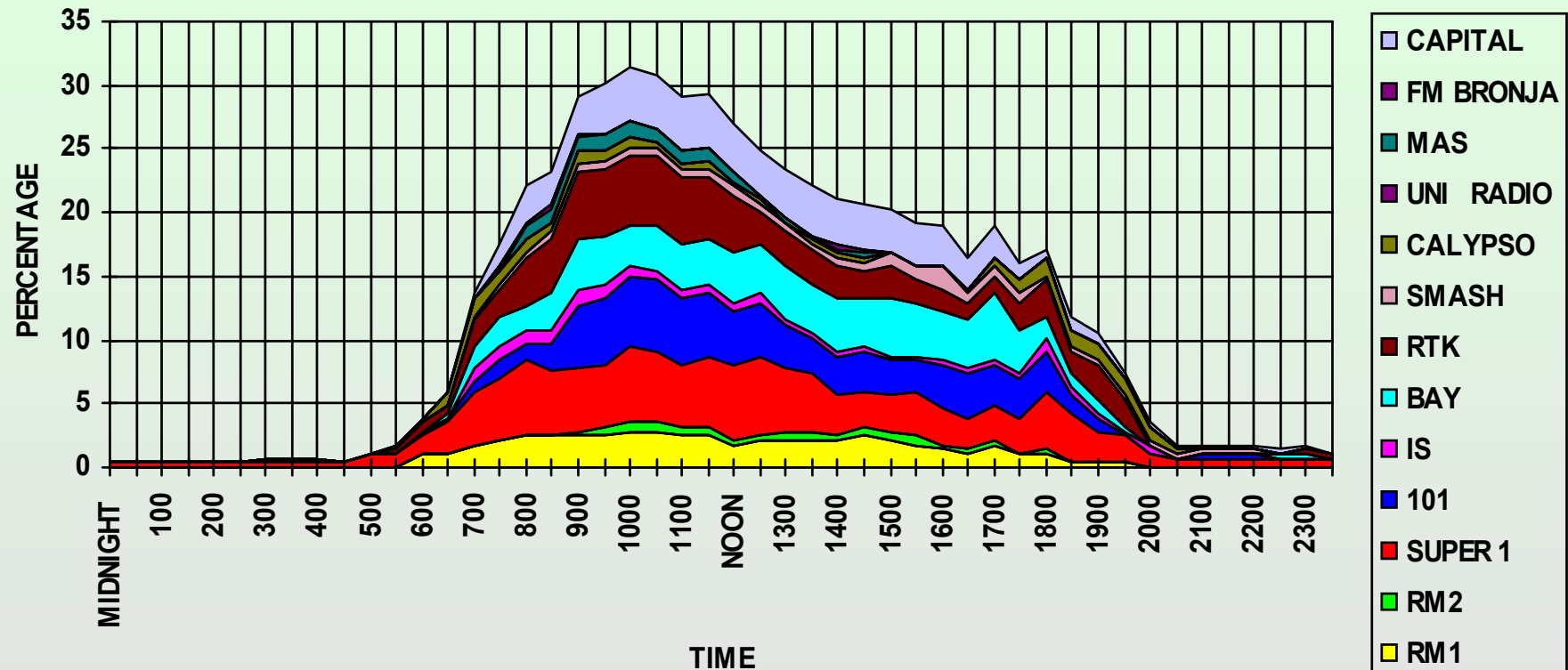
Radio Audiences: Tuesday

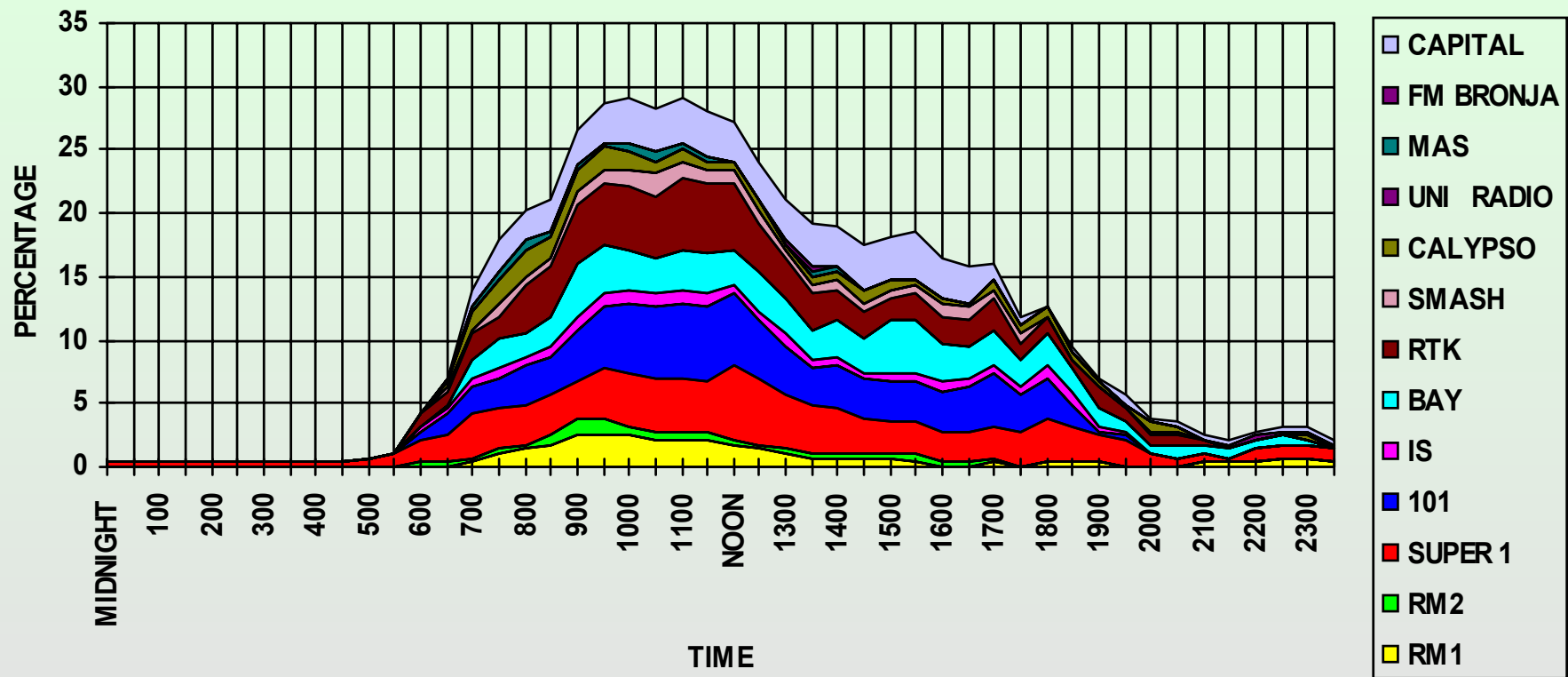


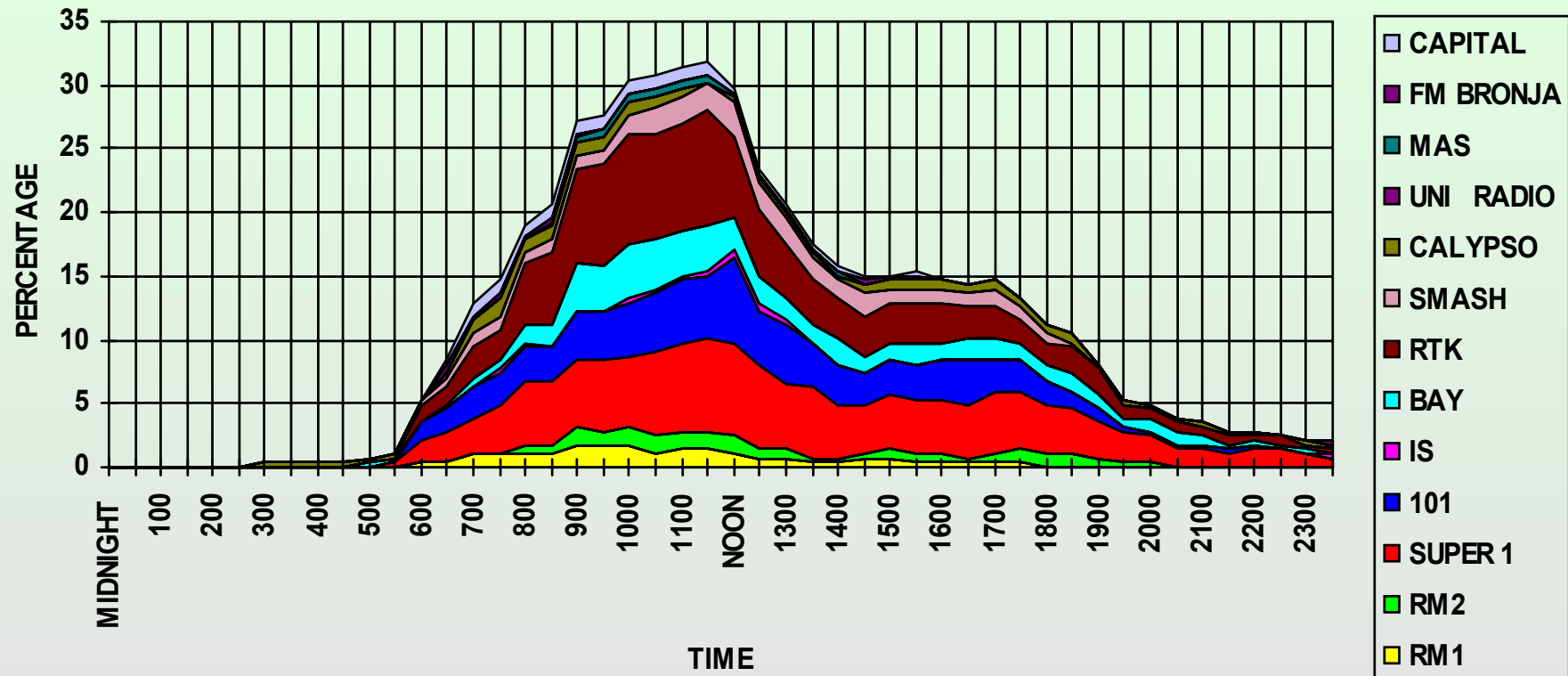
Radio Audiences: Wednesday

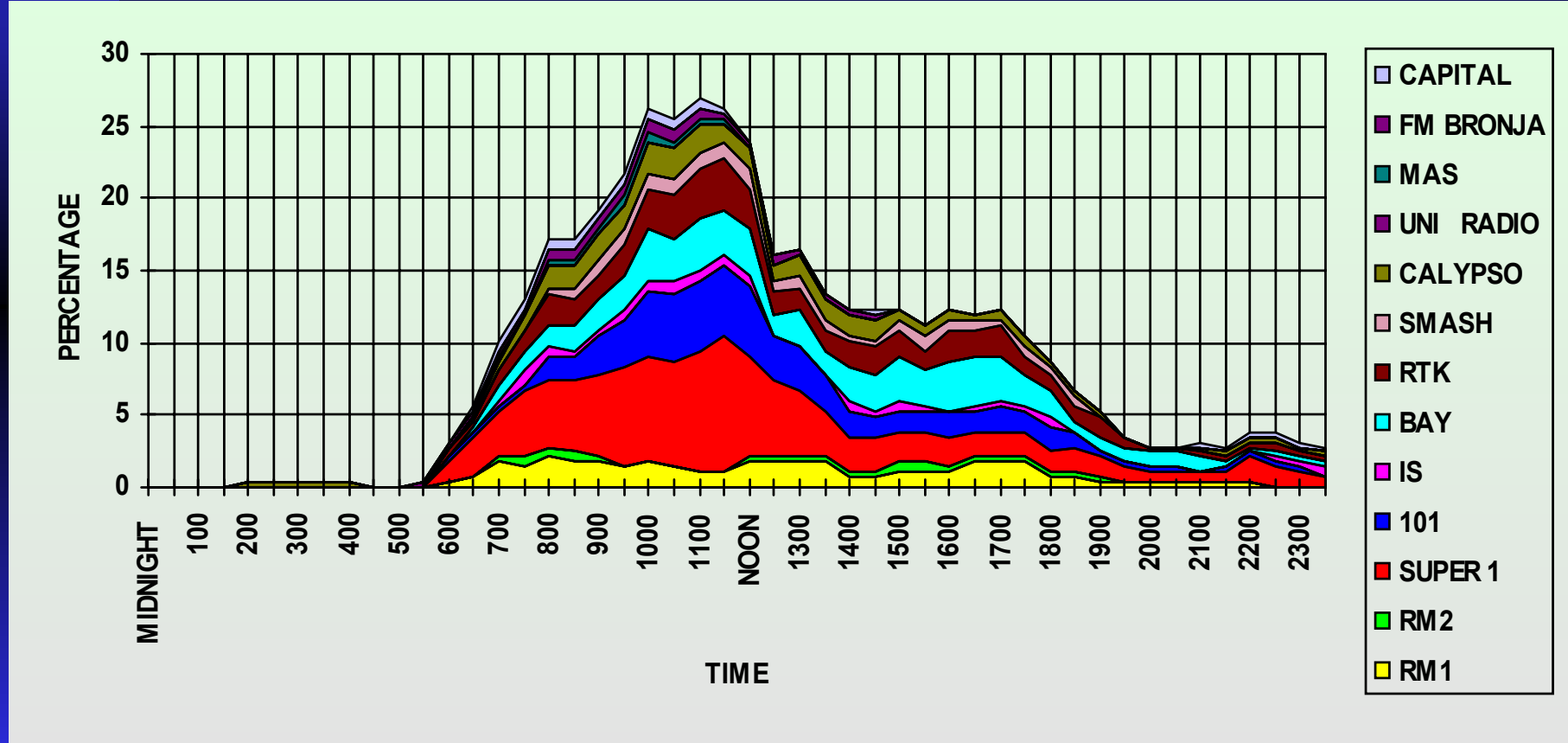


Radio Audiences: Thursday









Meaning of %

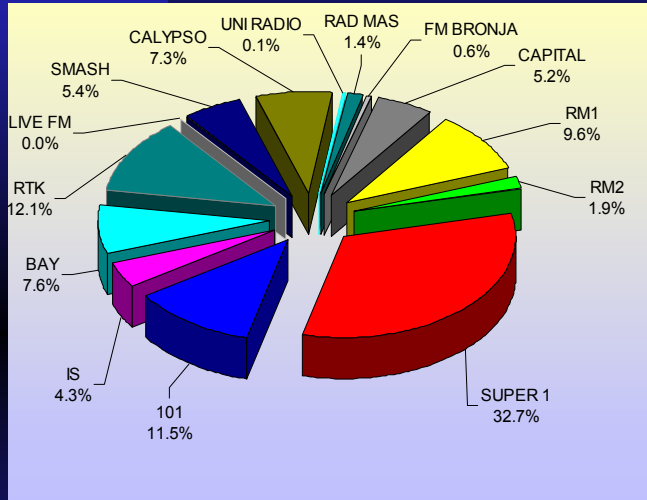
- The meaning of 1% in the following pie chart is different from the meaning of 1% of any of the tables in the report
- % in the following pie charts = the proportional share of audience from the total audience for the respective segment (i.e. Radio or TV) [slice of the cake when the cake = total audience of either Radio or TV]
 - Radio: For 6.00 – midnight 1% = 487 persons (March=470; October 1999=402)
 - For midnight to midnight 1% = 368 persons (March=316; October=306)
 - TV: 1%=371 (March=322; October=316)

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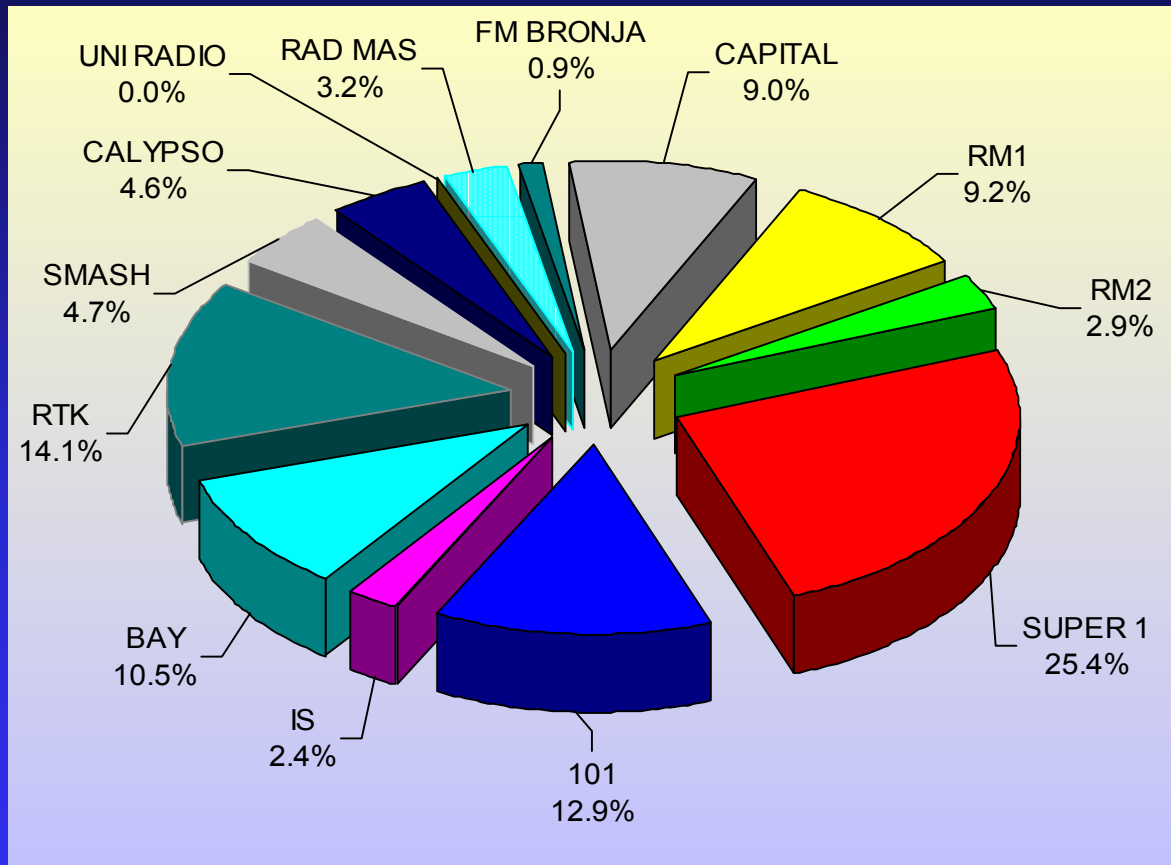
Daily Average Radio Audience Levels:

March 1999 & March 2000

Basis: All Available Slots to Station)

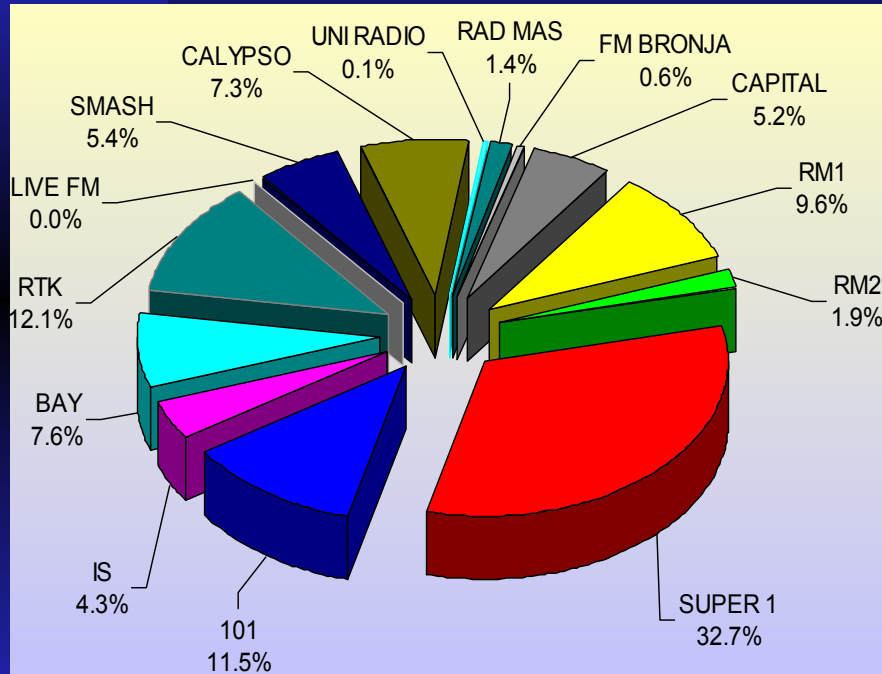


1999

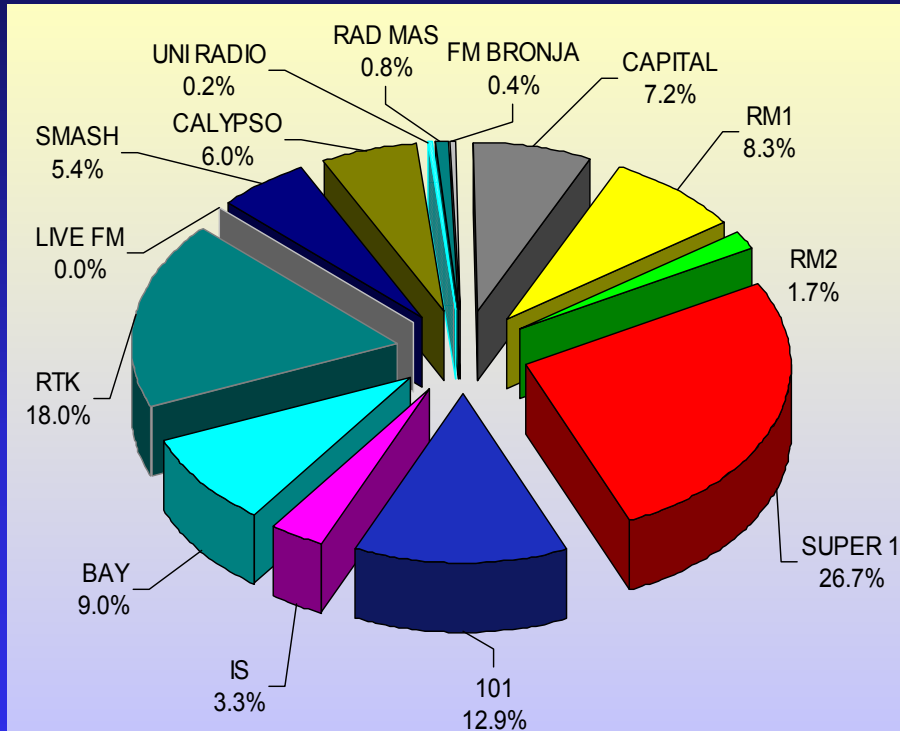


2000

Daily Average Radio Audience Levels: March & October 1999 (Basis: 6.00 a.m - Midnight)



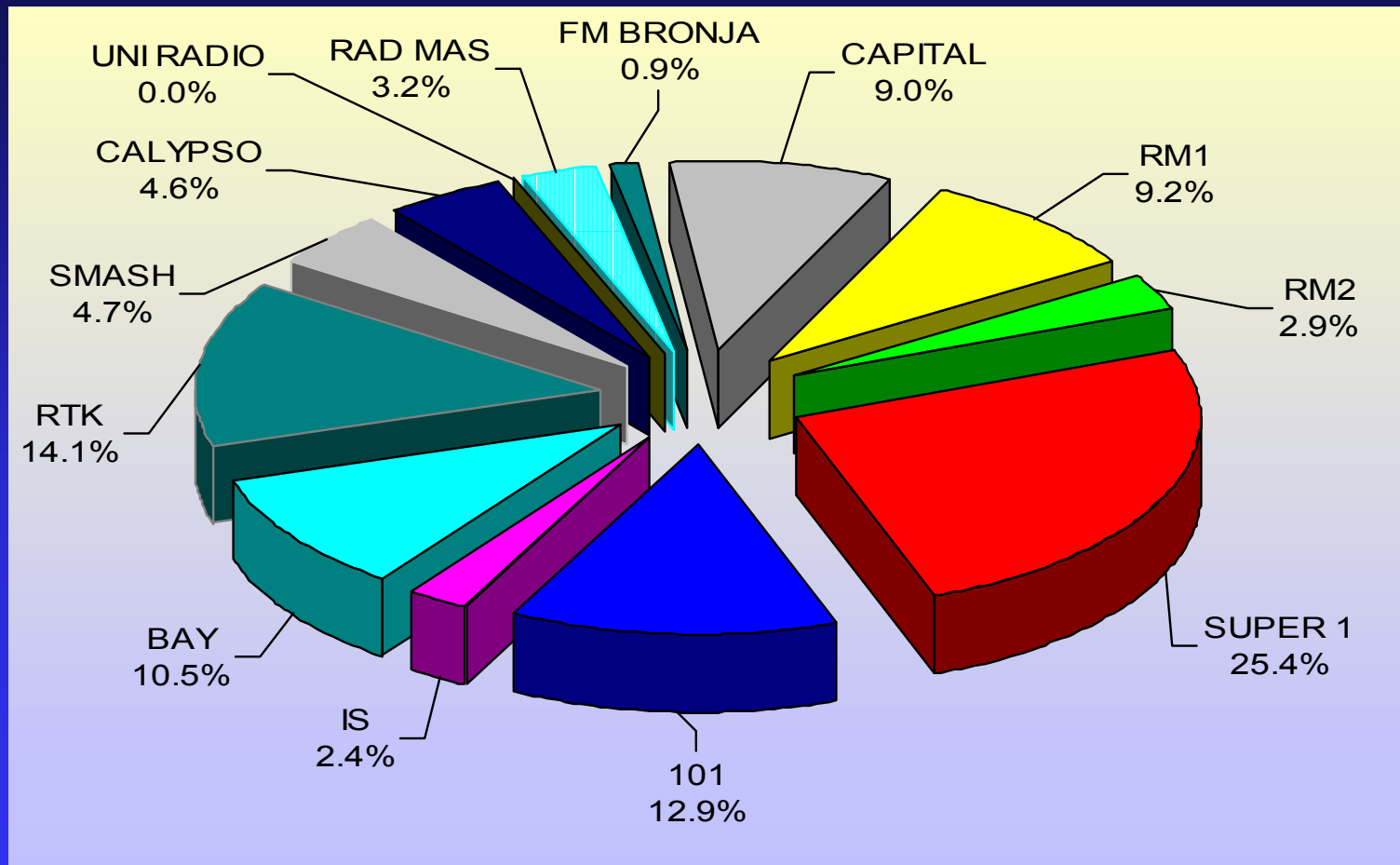
March



October

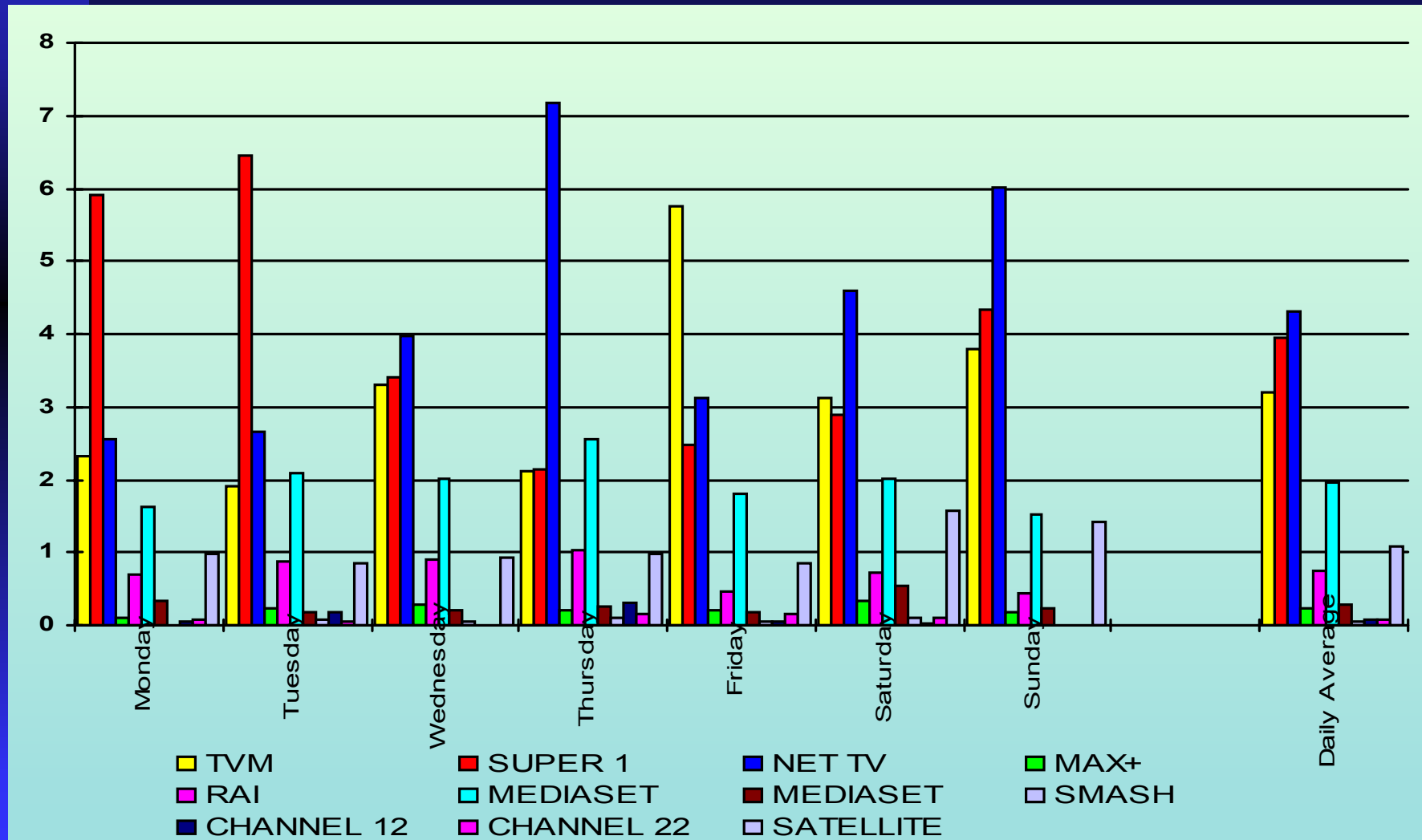
Daily Average Radio Audience Levels: March 2000

(Basis: 6.00 a.m - Midnight)

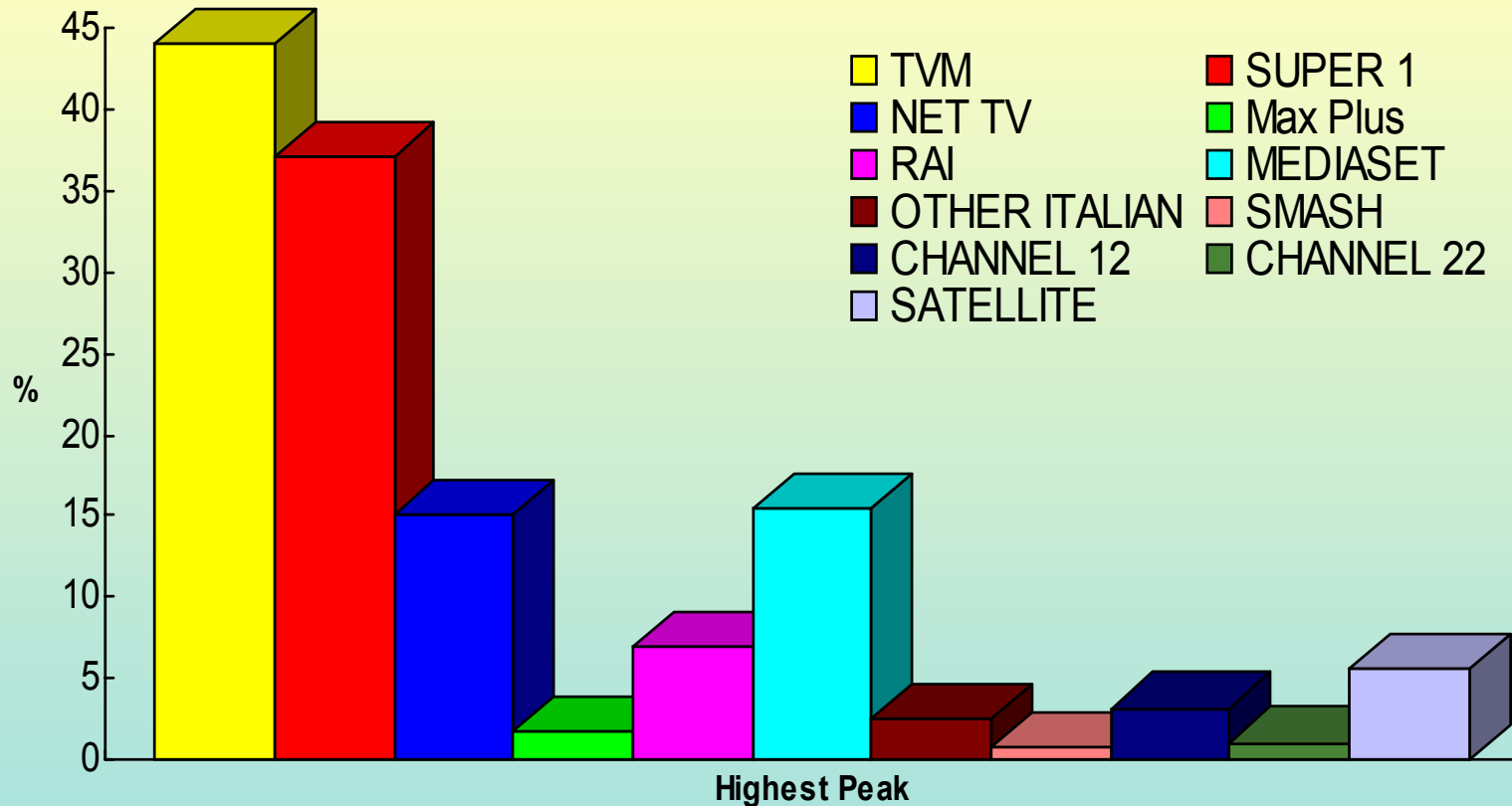


For 6.00 – midnight: 1% = 487 persons

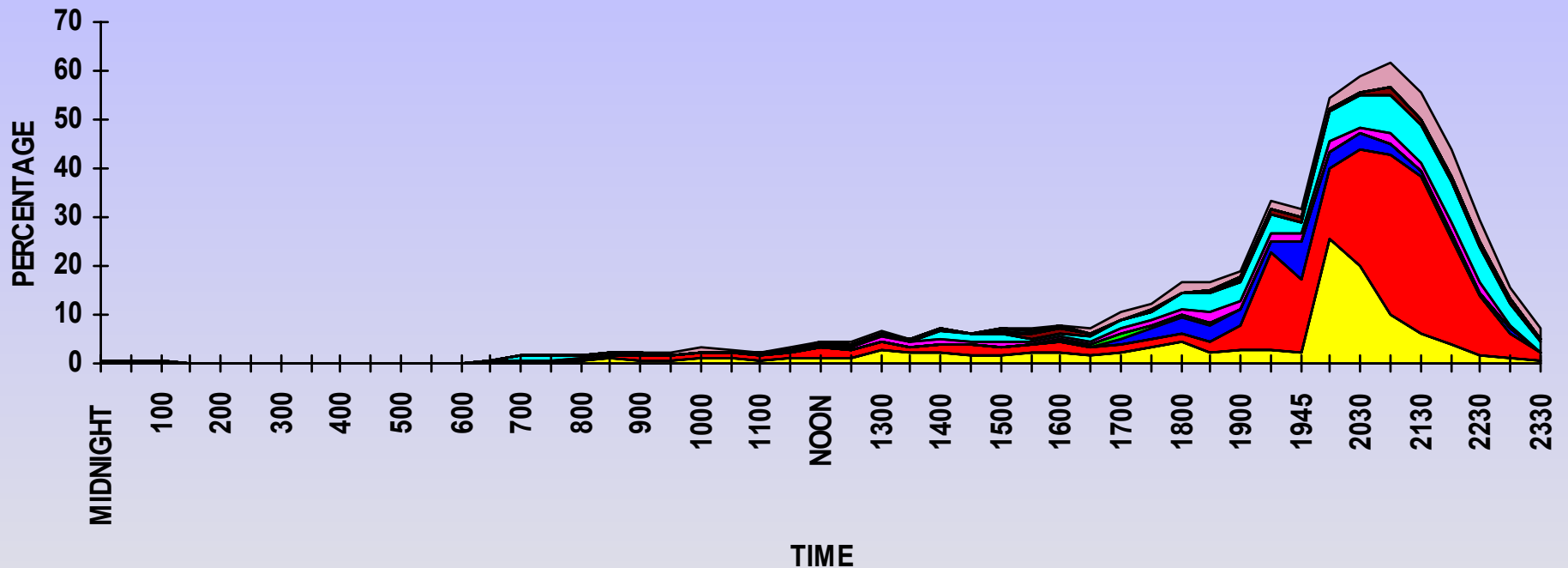
Daily TV Average Audience Share (Basis: Hours of Transmission by Station)



Highest TV Channel Peak Audience Share



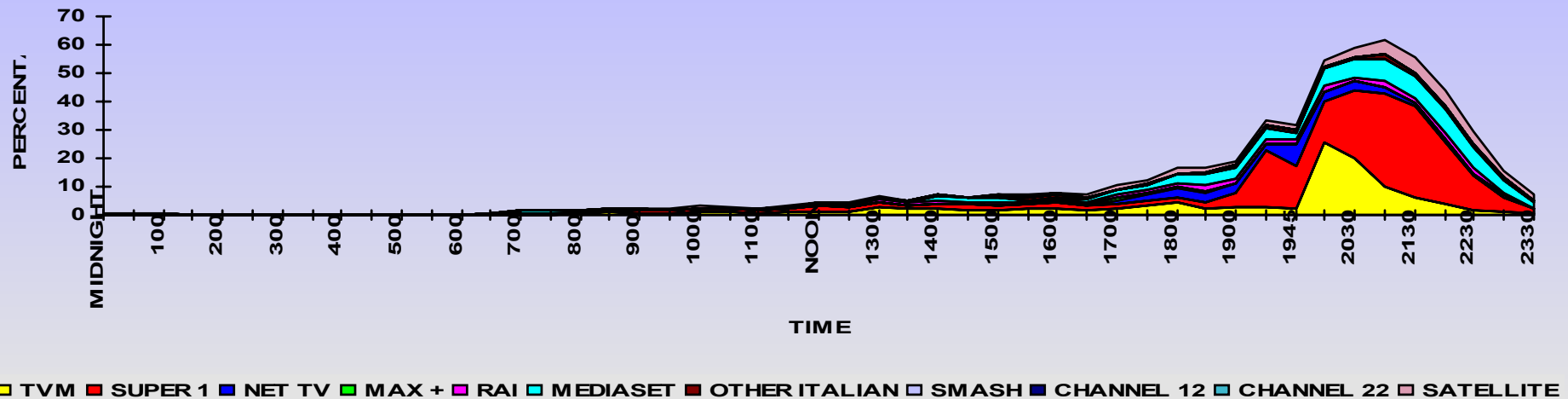
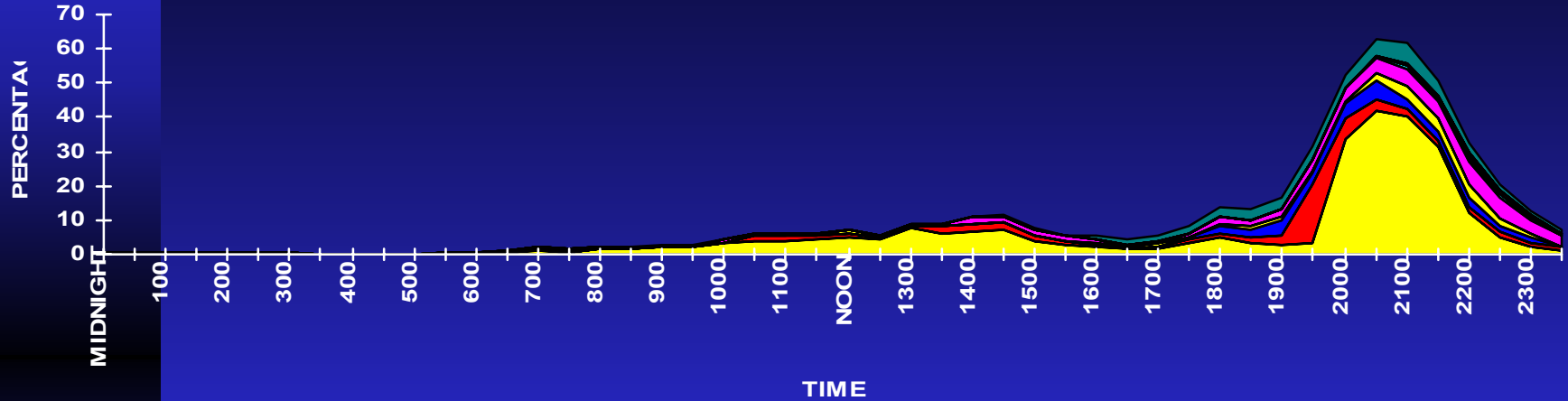
TV Viewing: Monday



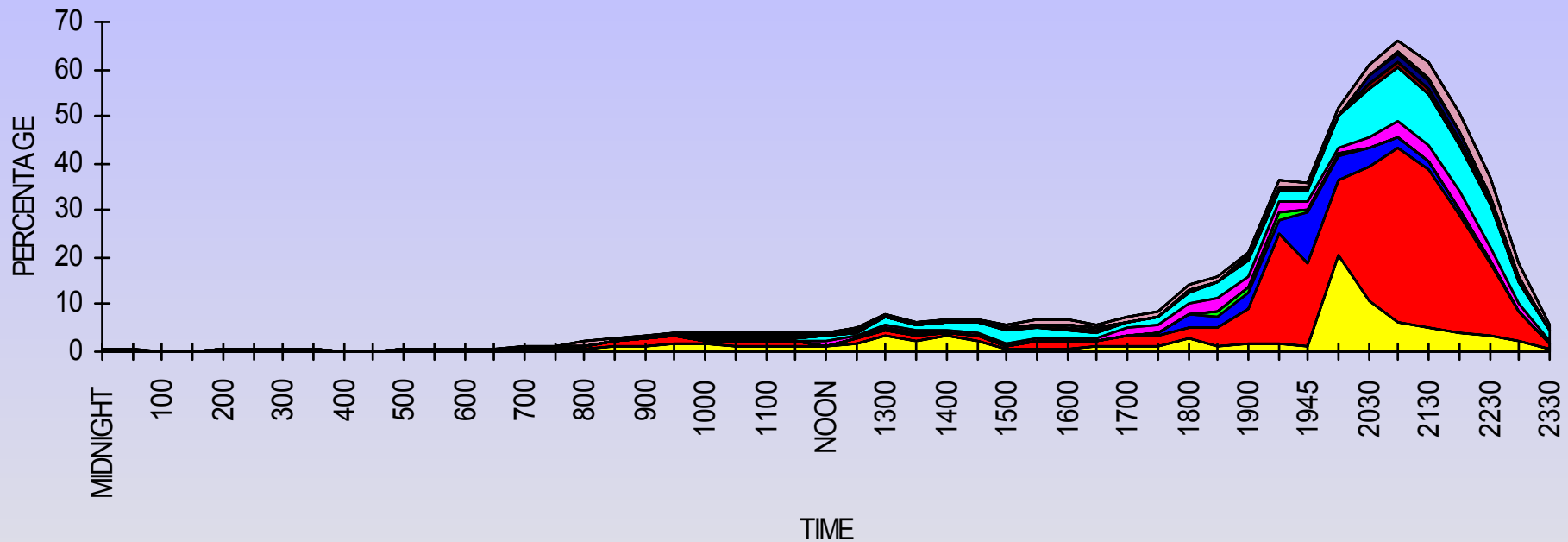
TVM SUPER 1 NET TV MAX + RAI MEDIASET OTHER ITALIAN SMASH CHANNEL 12 CHANNEL 22 SATELLITE

TV Viewing: Monday

March 1999 – March 2000

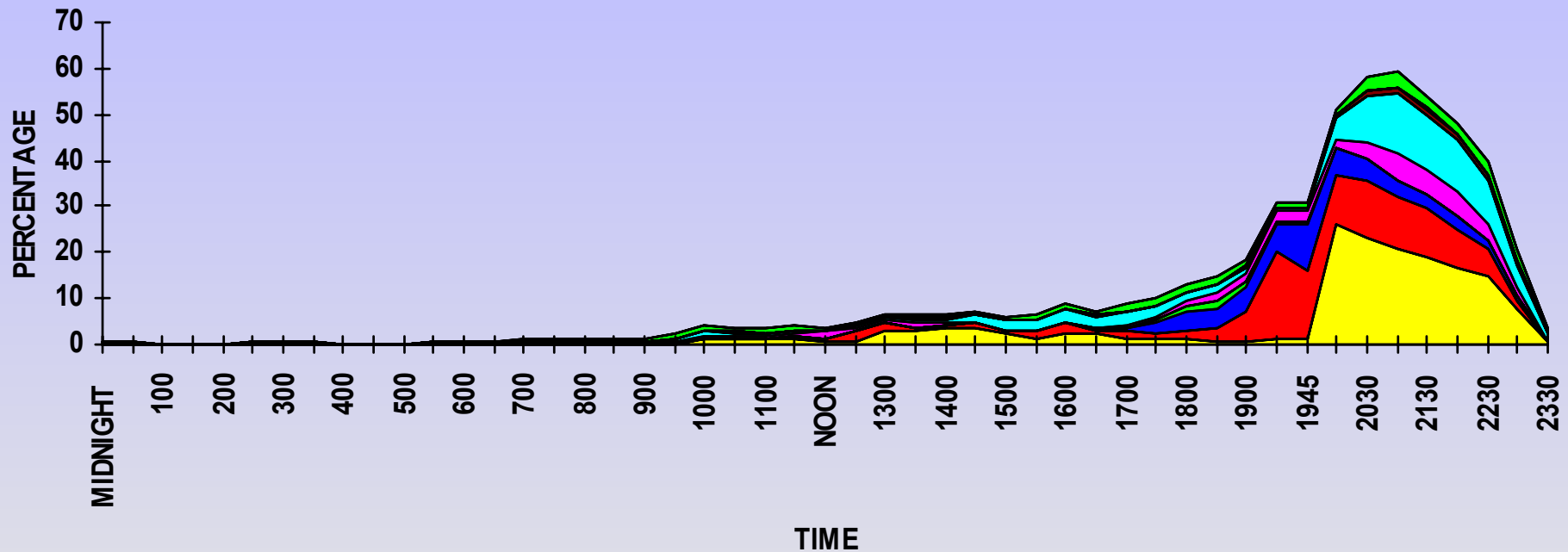


TV Viewing: Tuesday



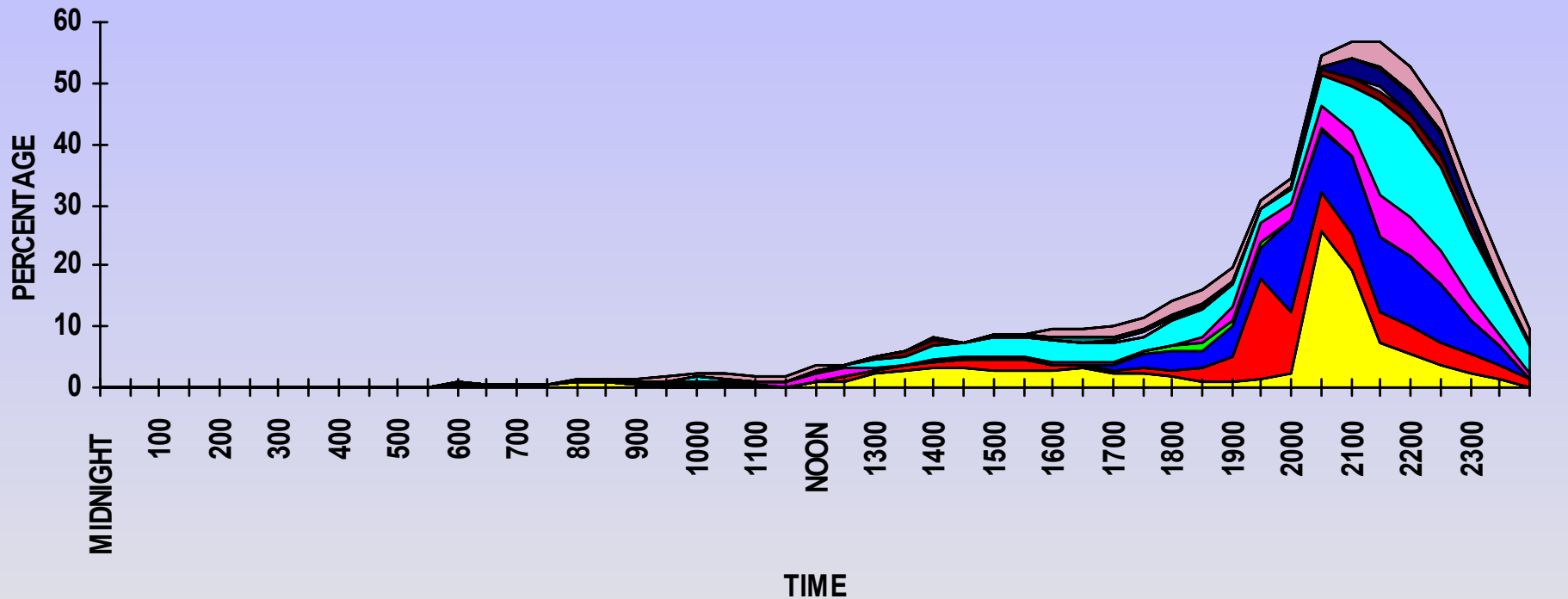
■ TVM ■ SUPER 1 ■ NET TV ■ MAX + ■ RAI ■ MEDIASET ■ OTHER ITALIAN ■ SMASH ■ CHANNEL 12 ■ CHANNEL 22 ■ SATELLITE ■

TV Viewing: Wednesday



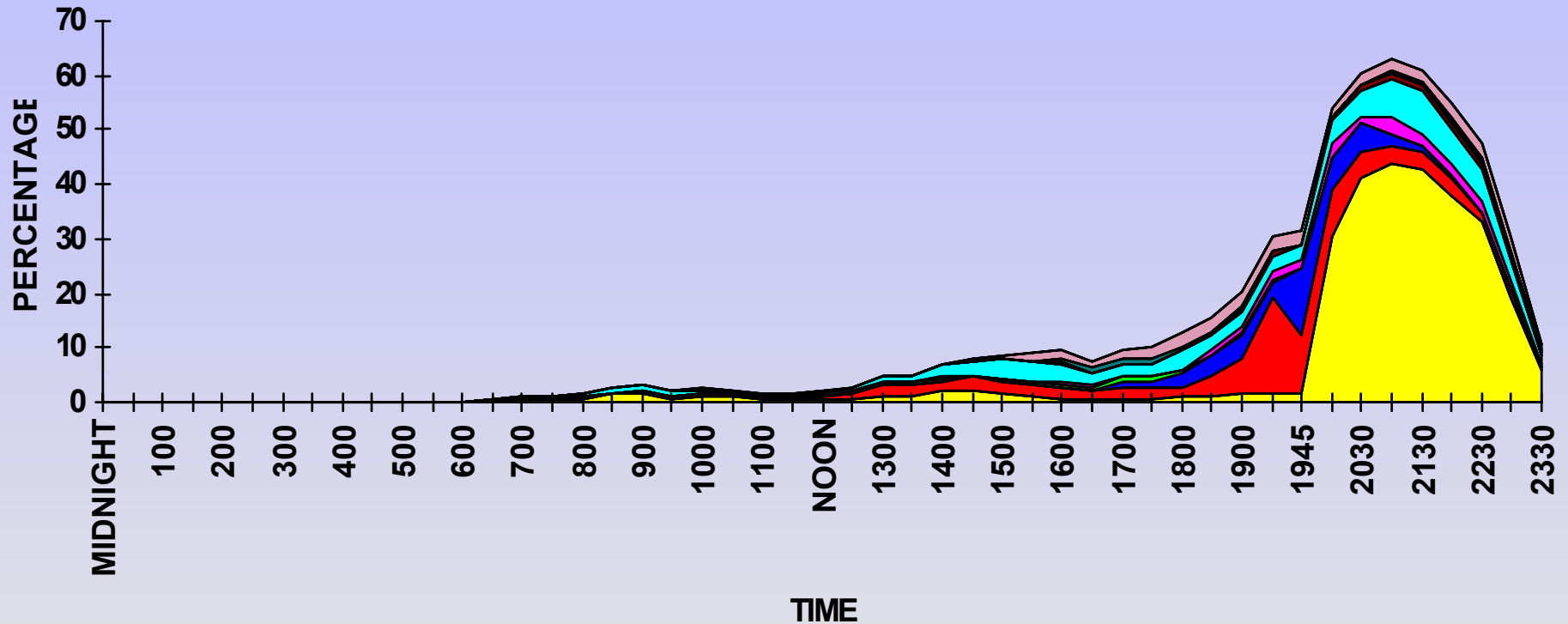
■ TVM ■ SUPER 1 ■ NET TV ■ MAX + ■ RAI ■ MEDIASET ■ OTHER ITALIAN ■ SMASH ■ CHANNEL 12 ■ CHANNEL 22 ■ SATELLITE ■

TV Viewing: Thursday



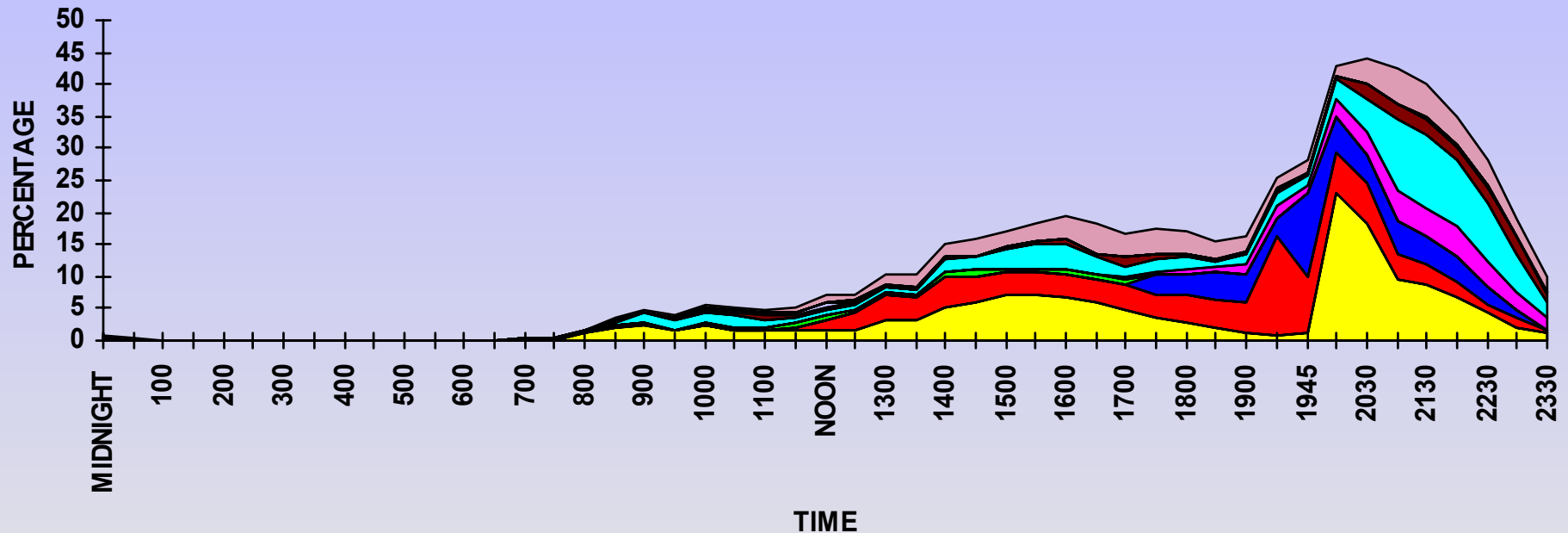
■ TVM ■ SUPER 1 ■ NET TV ■ MAX + ■ RAI ■ MEDIASET ■ OTHER ITALIAN ■ SMASH ■ CHANNEL 12 ■ CHANNEL 22 ■ SATELLITE ■

TV Viewing: Friday



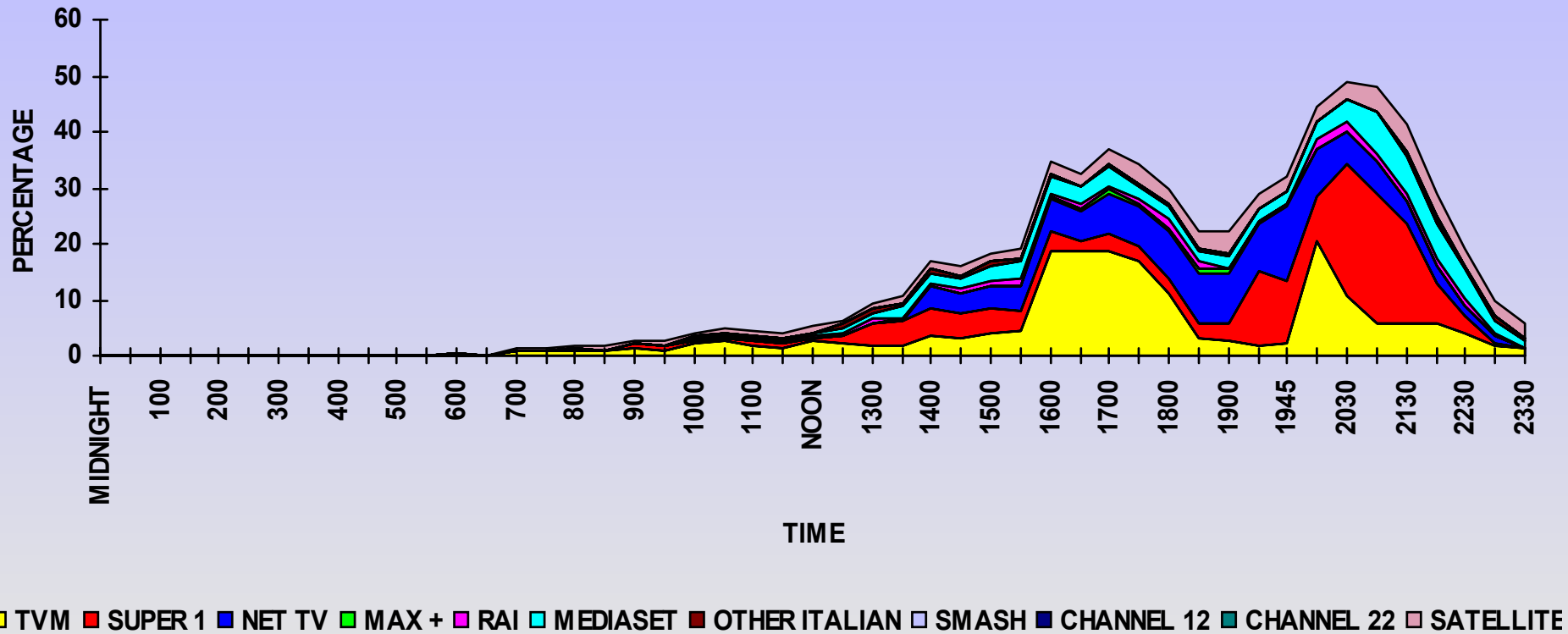
■ TVM ■ SUPER1 ■ NET TV ■ MAX + ■ RAI ■ MEDIASET ■ OTHER ITALIAN ■ SMASH ■ CHANNEL 12 ■ CHANNEL 22 ■ SATELLITE ■

TV Viewing: Saturday



■ TVM
 ■ SUPER 1
 ■ NET TV
 ■ MAX +
 ■ RAI
 ■ MEDIASET
 ■ OTHER ITALIAN
 ■ SMASH
 ■ CHANNEL 12
 ■ CHANNEL 22
 ■ SATELLITE

TV Viewing: Sunday

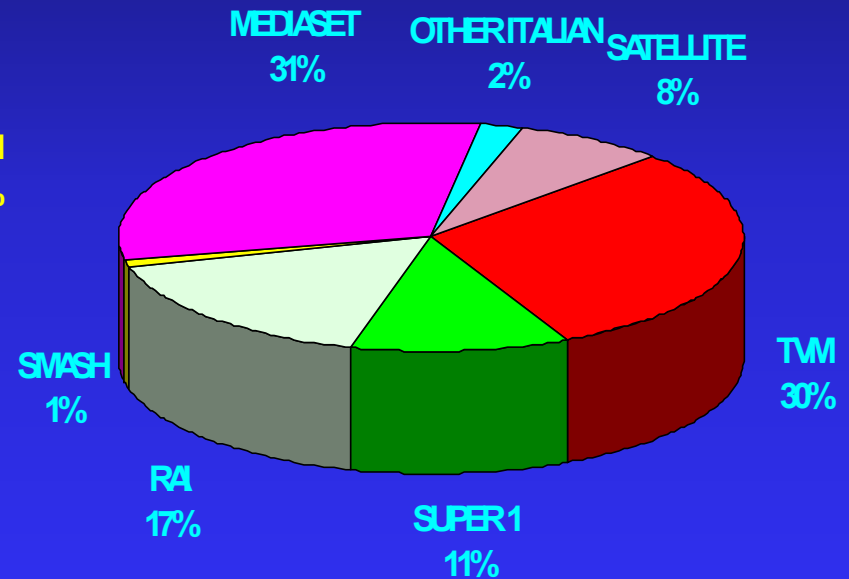
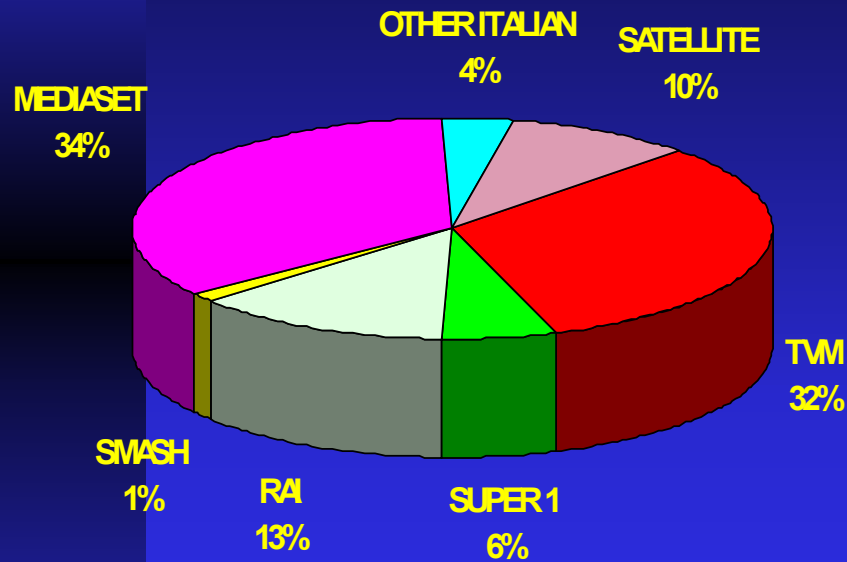


TV Viewing: Sunday

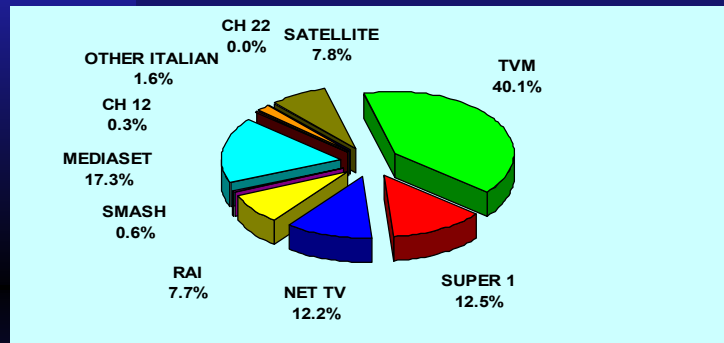
March 1999 – March 2000



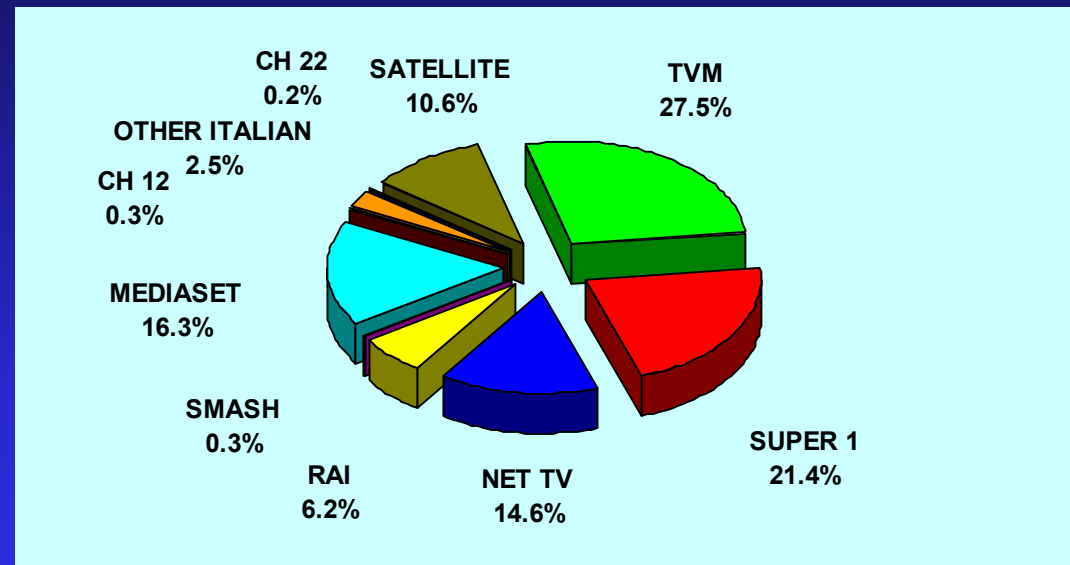
Daily Average TV Audience Levels (1995 & 1996)



Daily Average TV Audience Levels (March & October 1999)



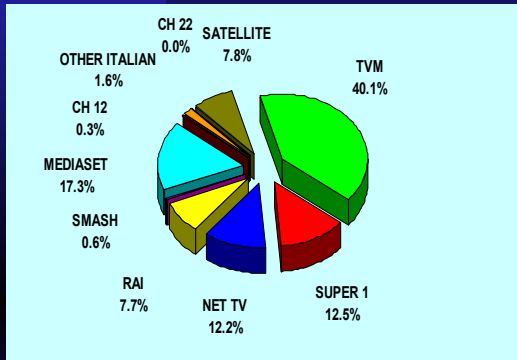
March



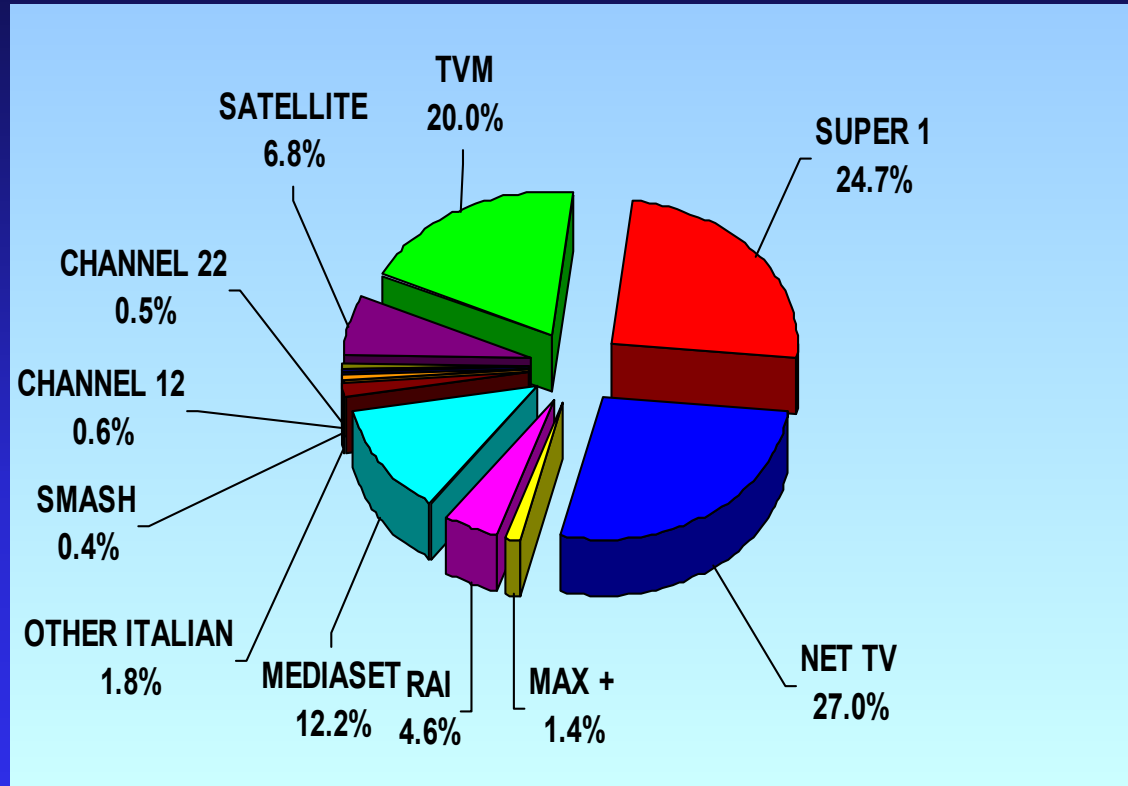
October

TV 1%: March= 322, October 1% = 316 used half-hour slots

Daily Average TV Audience Levels (March 1999 – March 2000)



March



TV 1%: March 1999= 316,

March 2000: 1% = 371 used half-hour slots

Conclusions: The Number of Persons who Say that they follow Radio & TV

■ Radio: back to March 1999 levels:

- ◆ March 1999: 77.0% vs. October 1999: 74.6%
- ◆ March 2000: 76.6%

■ TV: higher than March 1999 levels

- ◆ March 1999: 96.2% vs. October 98.5%
- ◆ March 2000: 97.1%

Trends in Radio Audience Share

6.00 am – Midnight

March 1999 – March 2000

■ Increases

- ◆ Capital (+3.8%)
- ◆ Bay Radio (2.9%)
- ◆ RTK (+2%)
- ◆ Radio Malta 2 (+1%)
- ◆ Radio 101 (+1.5%)
- ◆ Radju MAS (+1.8%)
- ◆ FM Bronja (+0.3%)

■ Decreases

- ◆ Super 1 Radio (-7.3%)
- ◆ Radio Calypso (-2.7%)
- ◆ Island Sund (-1.9%)
- ◆ Smash Radio (-0.7%)
- ◆ Radio Malta 1 (-0.4%)
- ◆ University Radio (-0.1%)

Radio Stations: Relative Strengths

- Super 1 – 25.4%
- RTK – 14.1%
- Radio 101 – 12.9%
- Bay Radio – 10.5%
- RM1 – 9.2%
- Capital – 9.0%
- Smash – 4.7%
- Radio Calypso – 4.6%
- Island Sound – 2.4%
- Radio Malta 2 – 2.9%
- Radju MAS – 3.2%
- FM Bronja - 0.9%
- University Radio - 0.0%

Source for News

- Main source remains TV
 - ◆ TV 72.6% 1st preference
 - ◆ radio: 14.2% 1st preference
 - ◆ newspapers: 7.4% first preference
- Music & Local News are the two programme segments that generate most interest on radio
- Local & Foreign News are the two programme segments that generate most interest on TV

TV Programmes Ppopularity

- News Bulletin continues to register very but not always the highest audience level
- Some programmes exceed their respective station's news bulletin:
 - ◆ *Xarabank*
 - ◆ *Simpatiki*

Trends in TV Audience Shares

March 1999 – March 2000

■ Increases

- ◆ NET TV (+14.8%)
- ◆ Super 1 (+12.2%)
- ◆ Other Italian (+0.2%)
- ◆ Channel 12 (+0.3%)
- ◆ Channel 22 (+0.5%)

■ Decreases

- ◆ TVM (-20.1%)
- ◆ RAI (-3.1%)
- ◆ Mdiaset (-1.0%)
- ◆ Smash (-0.2%)
- ◆ Satellite (-1%)

Thank you for your attention!

BA Audience Audit March 2000



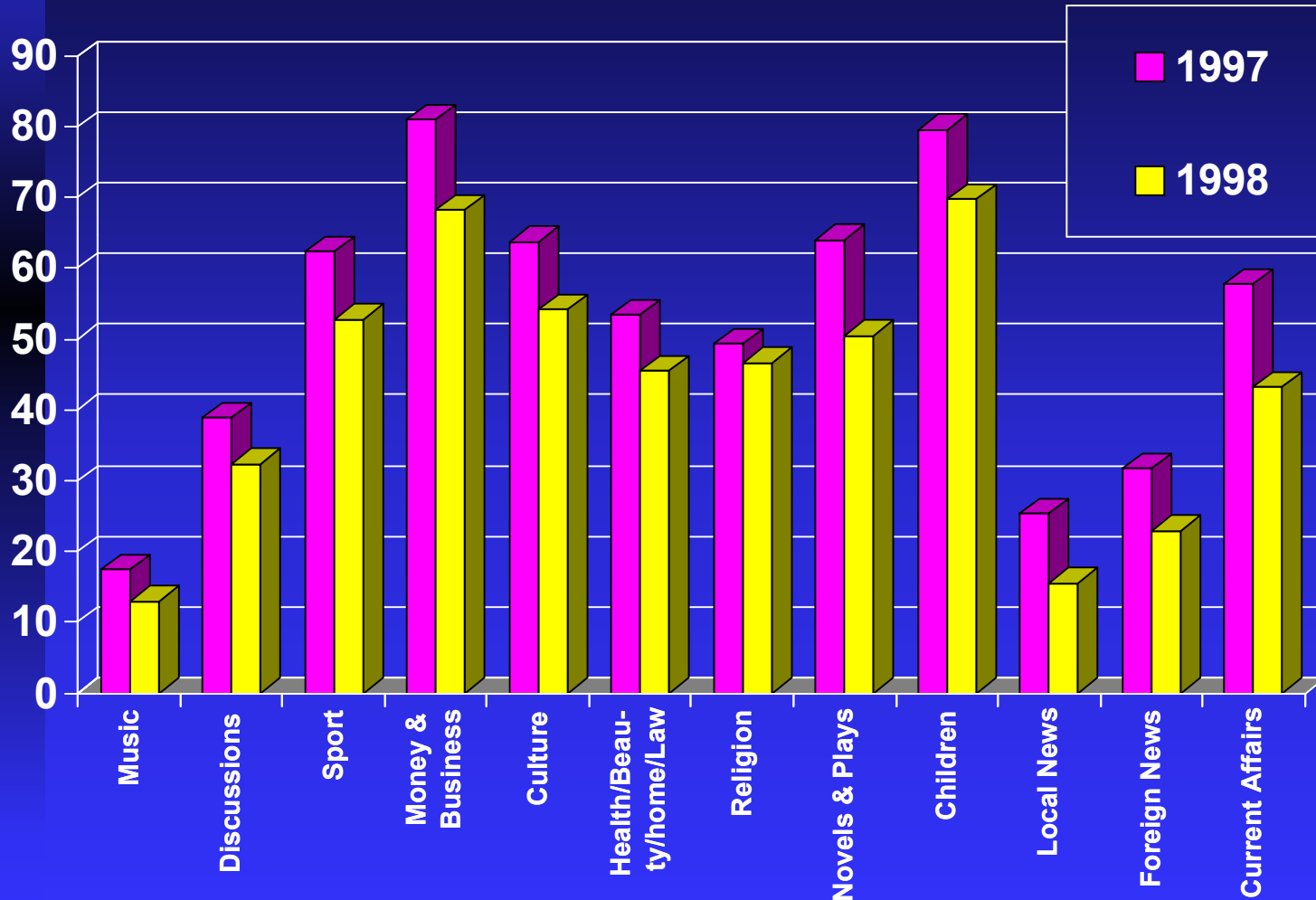
BA Audience Audit March 2000



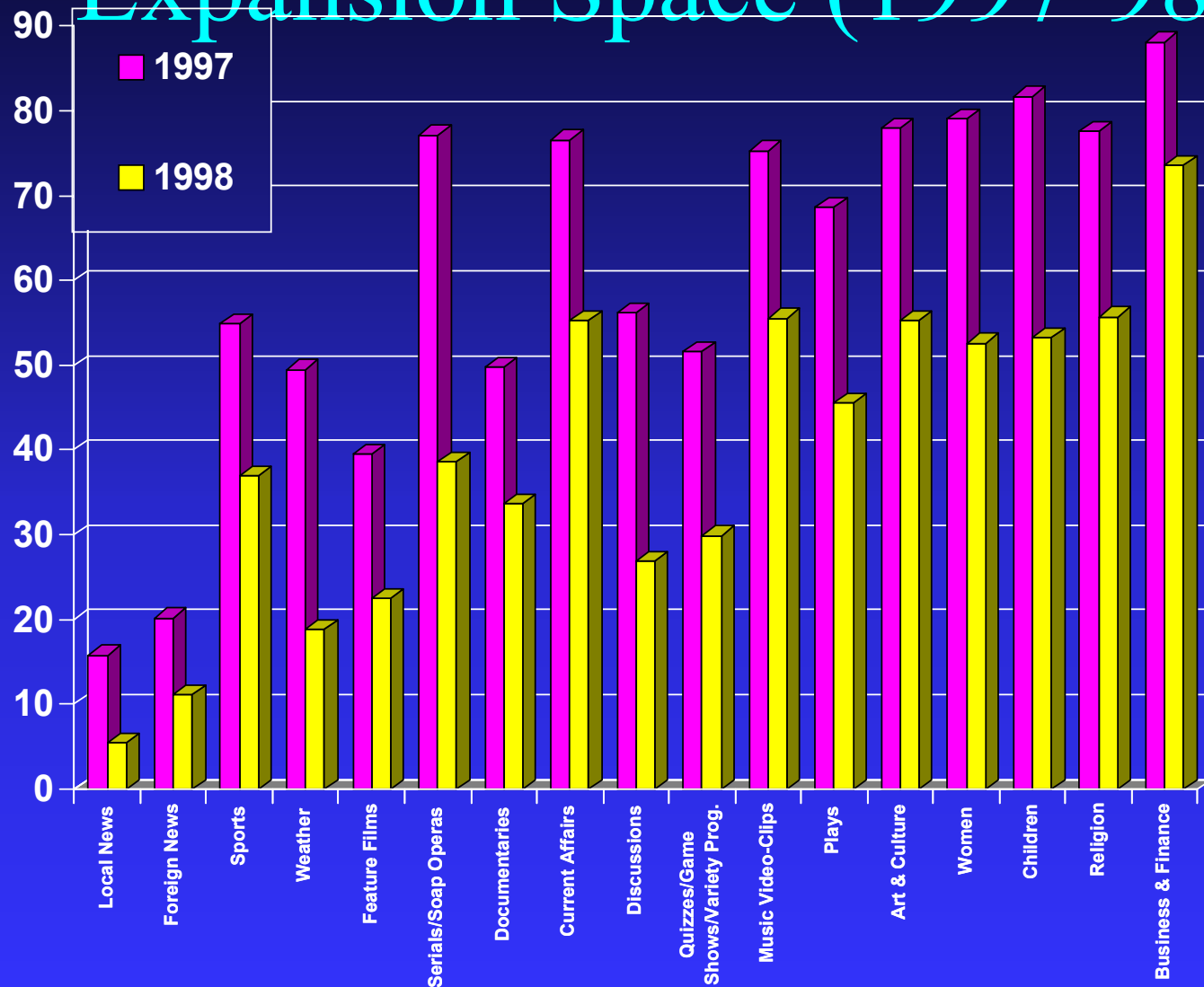
BA Audience Audit March 2000



Radio Programme Segment Expansion Space (1997-98)

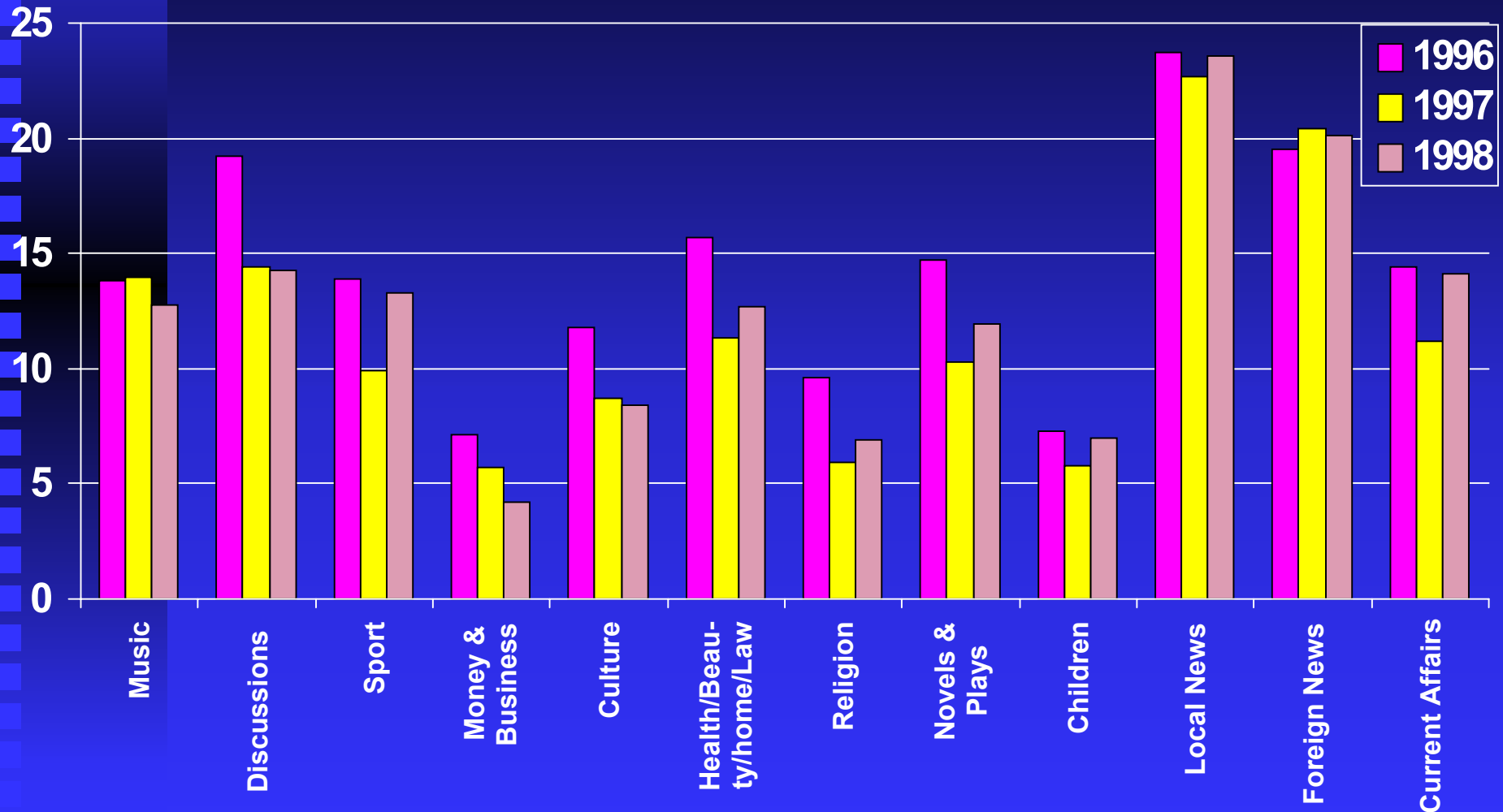


TV Programme Segment Expansion Space (1997-98)



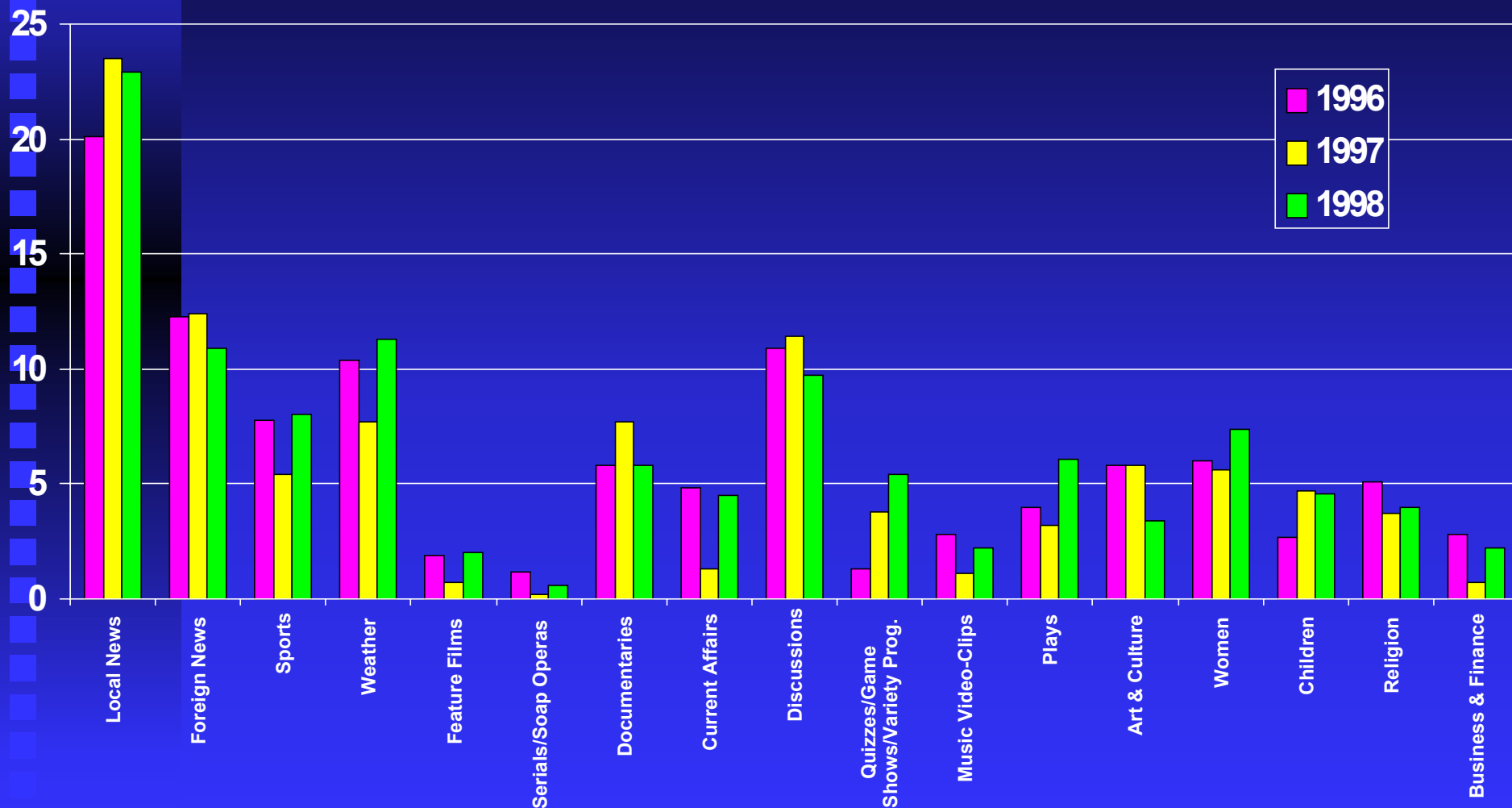
Radio Super 1

Radio Station Preferences 1996 - 1998



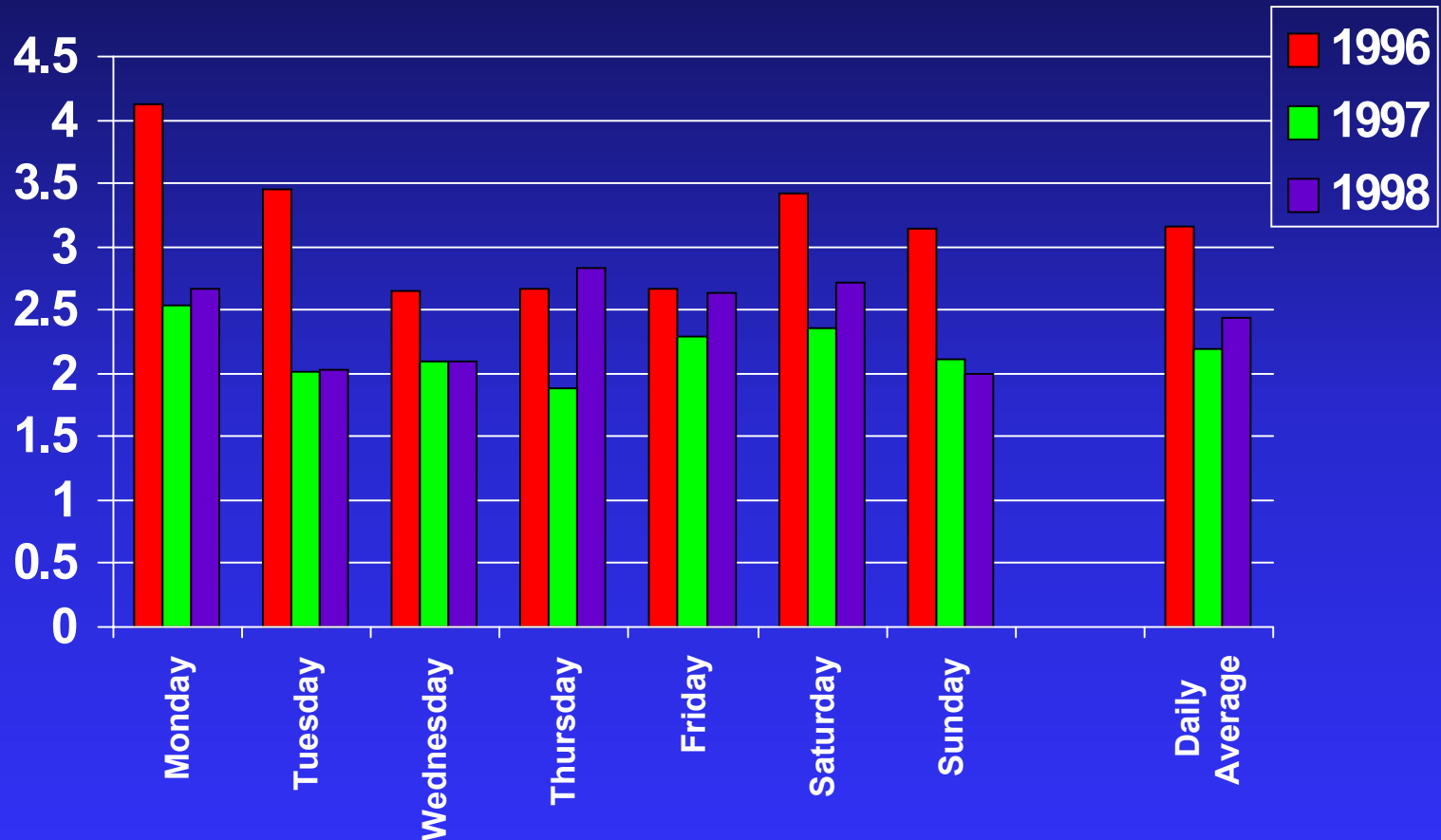
Super 1 TV

TV Programme Preferences 1996 - 1998



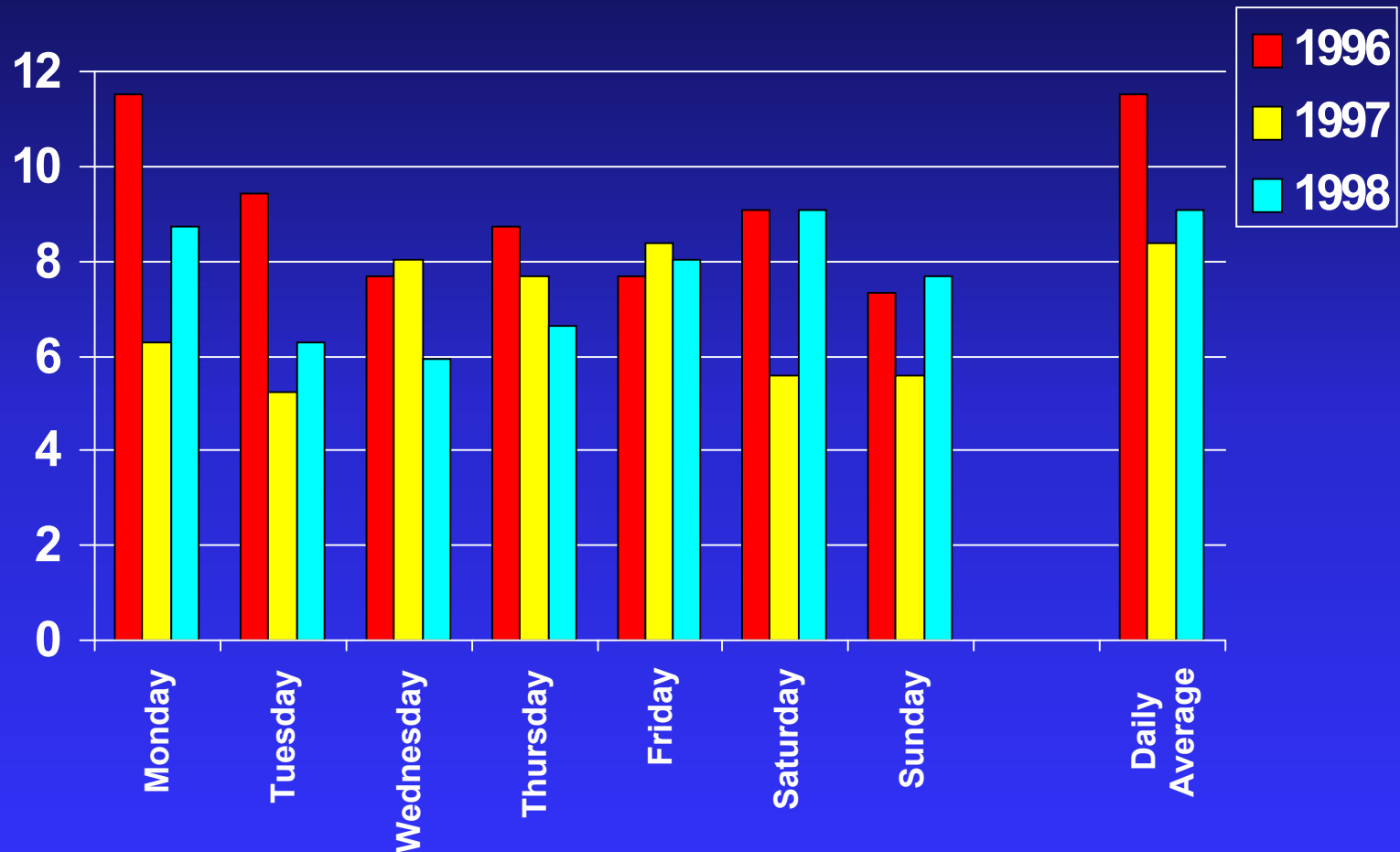
Radio Super 1

Daily Average 1996 - 1998



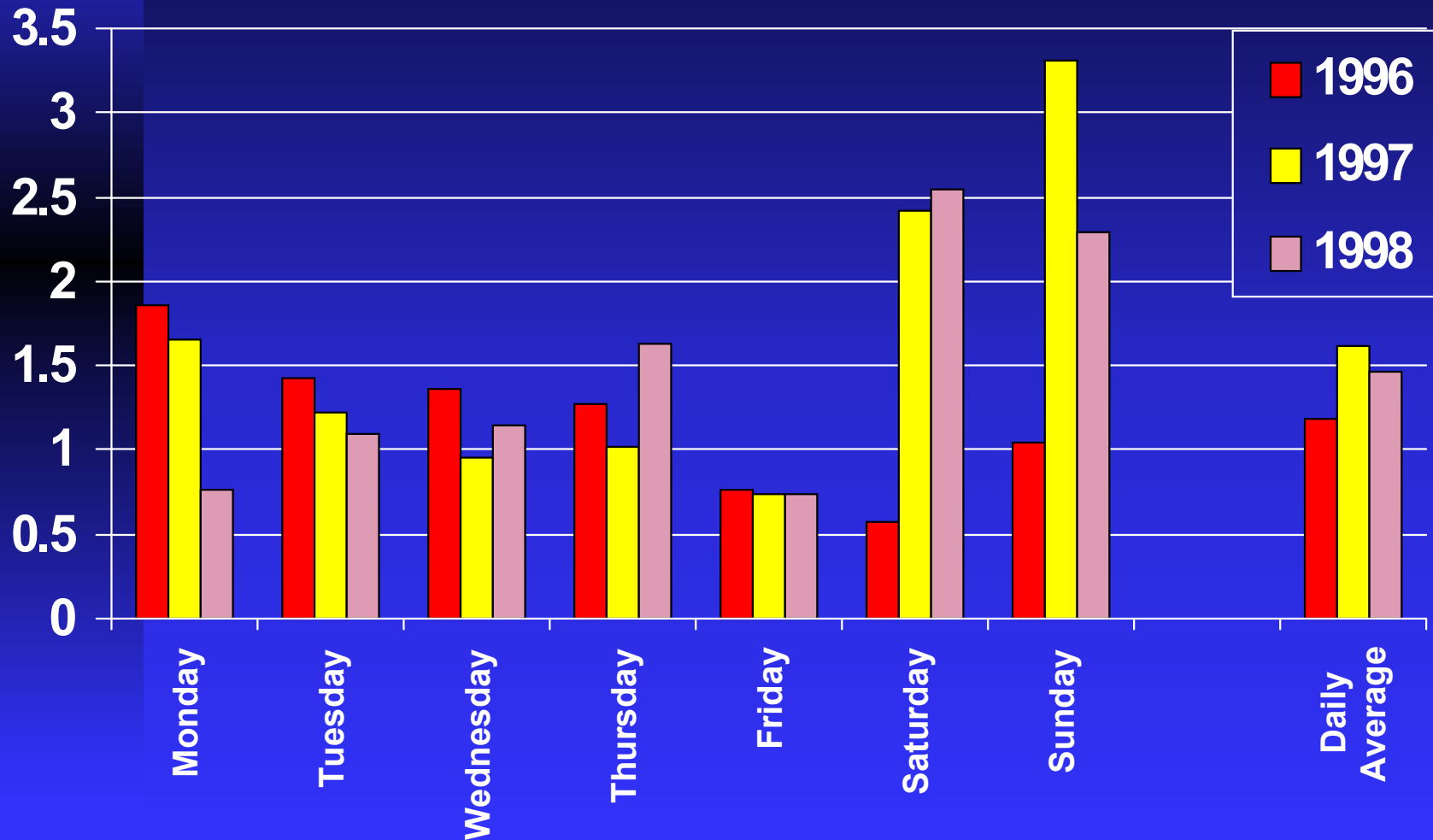
Radio Super 1

Daily Peak 1996 - 1998



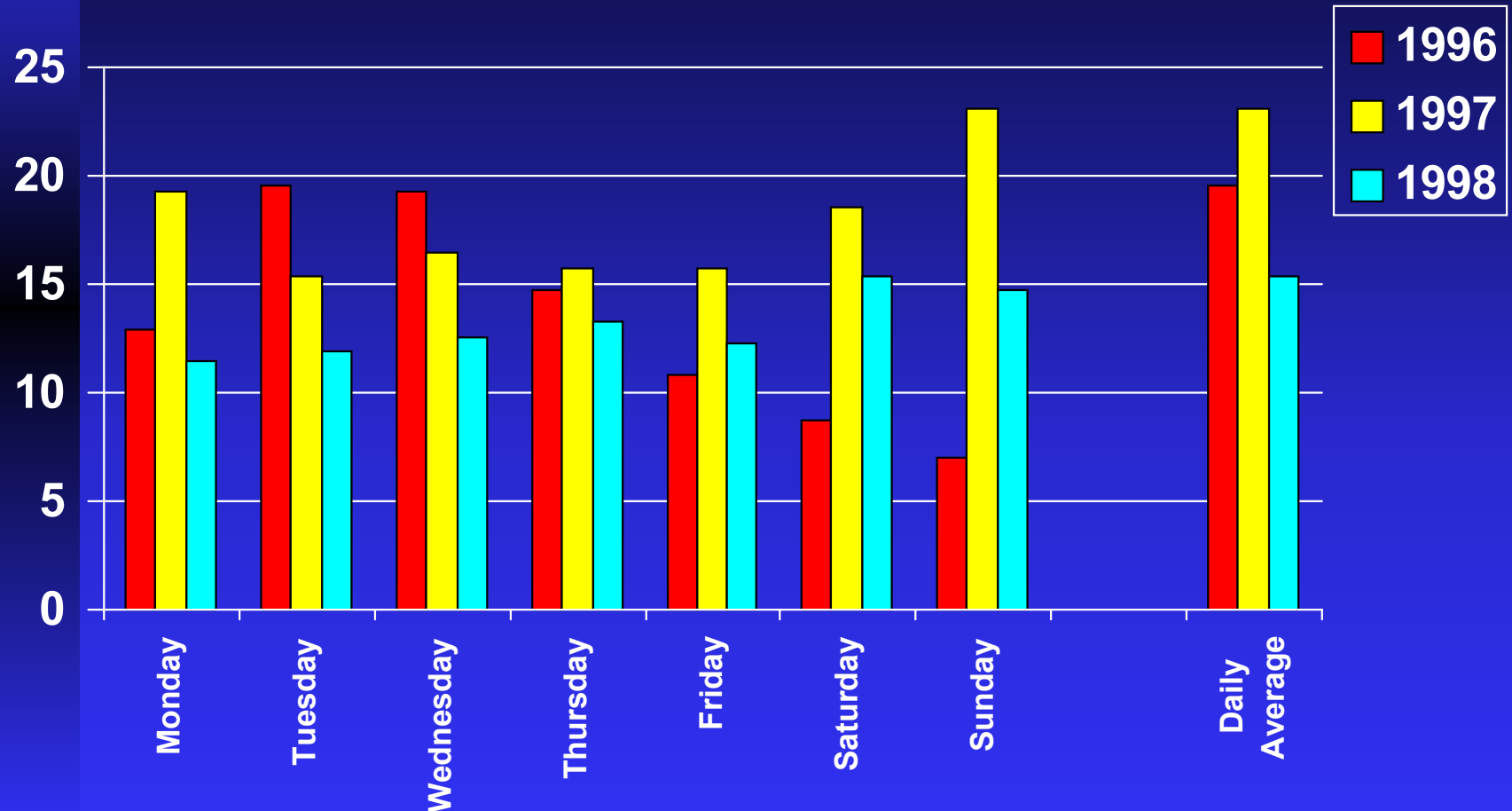
Super 1 TV

Daily Average 1996 - 1998



Super 1 TV

Daily Peak 1996 - 1998



Daily Average TV Audience Levels (1997 & 1998)

