

TV & Radio Audiences in Malta

Broadcasting Authority

2nd Quarter 2002

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...”

BA Directive for TV Audience Share

Circular 18/00 June 2000

3 Time-bands

- **0600 hrs – Noon**
- **Noon – 1900 hrs**
- **1900 hrs - Midnight**

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 - 2001 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	37.2	36.9
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	490	511
	100	49.0	51.0

Who Listens to Radio

	Total	Male	Female
N=	1001	490	511
	%	%	%
Listen to the Radio	70.8	72.4	69.3
Do Not Listen to the Radio	29.2	27.6	30.7

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	709	355	354
	%	%	%
Varies Considerably	0.7	0.6	0.8
One Hour	34.7	40.0	29.4
Two Hours	19.6	19.2	12.4
Three Hours	9.9	7.3	12.4
Four to Nine Hours	33.4	31.0	35.8
Ten Hours and more	1.7	1.9	1.5

Where is Radio Listened to

	Total	Male	Female
N=	709	355	354
	%	%	%
NA	1.4	0.8	2.0
At home	75.5	62.8	88.1
At work	17.3	28.2	6.5
In the car	30.0	43.4	16.7

Who watches TV

	Total	490	511
N=	1001	490	511
	%	%	%
Watch TV	97.4	96.7	98.0
Do Not watch TV	2.6	3.3	2.0

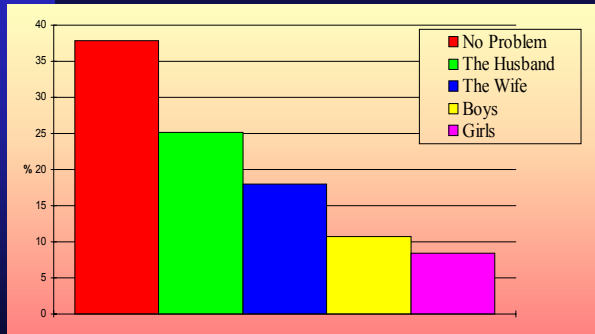
Average No. of Hours TV is watched

	Total	Male	Female
N=	975	474	501
	%	%	%
Varies Considerably	0.3	0.2	0.4
One Hour	18.4	21.5	15.4
Two Hours	31.2	32.1	30.3
Three Hours	21.7	21.1	22.4
More than three Hours	28.4	25.1	31.5

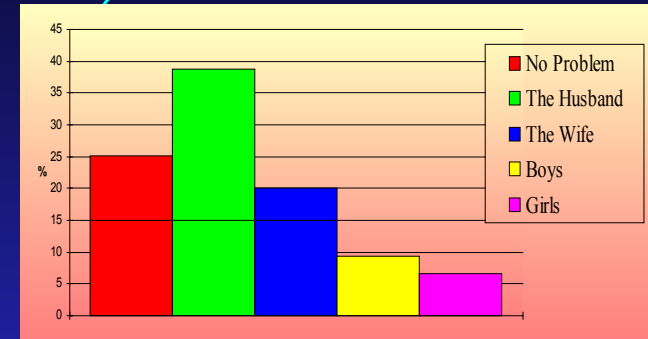
Where TV is Watched

	Total	Male	Female
N=	975	474	501
	%	%	%
Sitting Room	50.7	51.3	50.1
Dining Room	3.1	2.5	3.6
Kitchen	19.1	13.7	24.2
Bedroom	25.7	30.6	21.2
Another Place	1.4	1.9	1.0

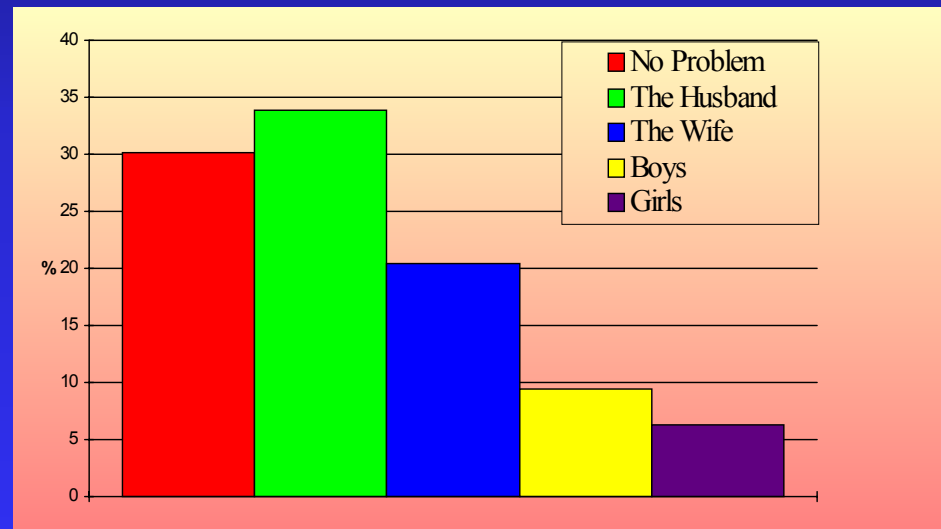
Who decides on Choice of Channel (2001 - 2002)



1st Quarter 4th



Quarter 2001



2nd Quarter 2002

Mode of Receiving TV Signal

Base= All

	Total	AB	C1	C2	DE
N=	1001	135	284	282	300
	%	%	%	%	%
Roof Antenna	37.6	30.4	33.8	40.1	42.0
Cable	62.9	68.1	64.8	59.2	62.3
Satellite	15.5	16.3	16.5	17.7	12.0

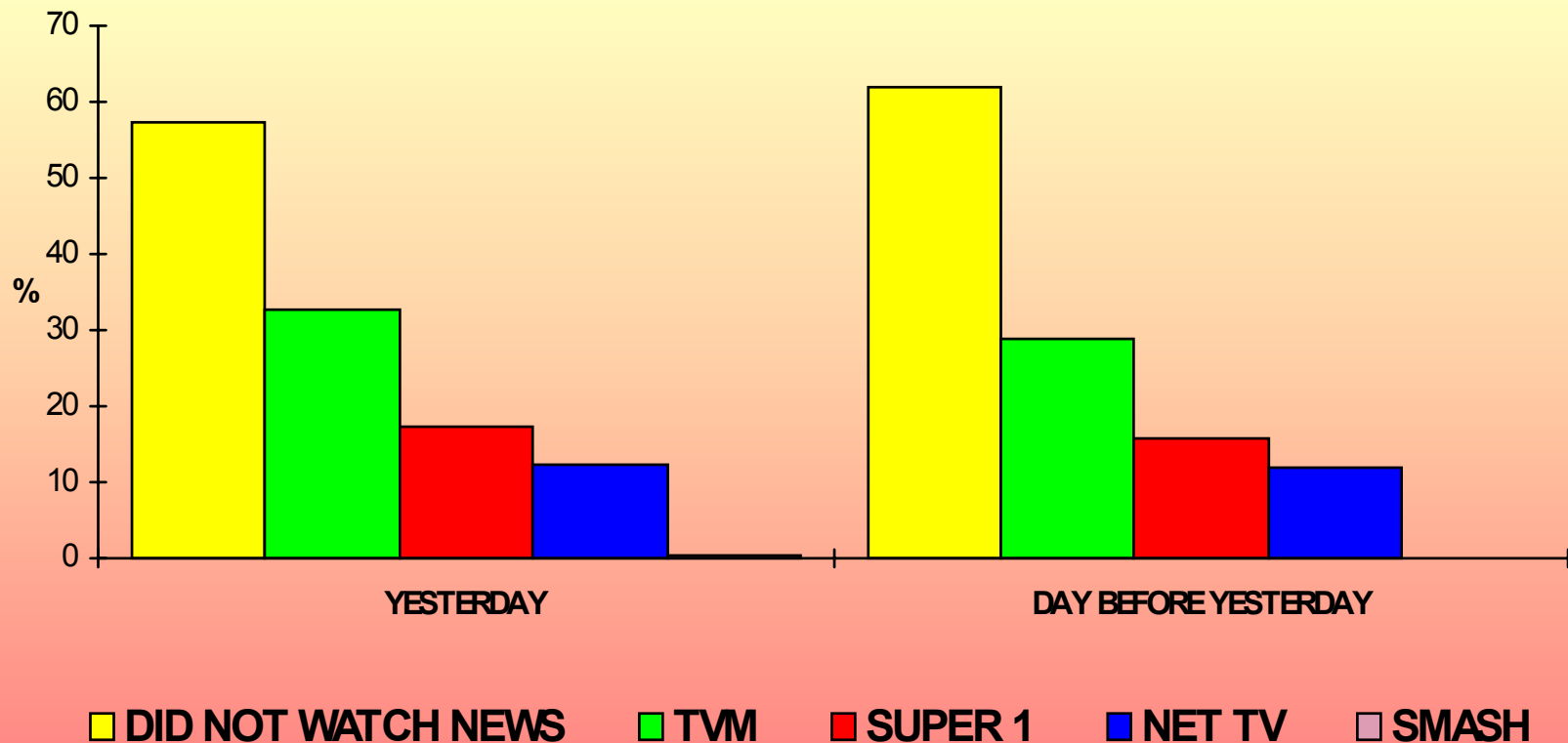
Preferred Source for Local News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.0	0.8	1.2
Radio	10.2	11.2	9.2
TV	79.7	76.9	82.4
Newspaper	6.2	8.8	3.7
From Other Persons	2.9	2.2	3.5

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.7	2.2	1.2
Radio	7.6	8.2	7.0
TV	83.7	81.8	85.5
Newspaper	4.1	5.3	2.9
From Other Persons	2.9	2.4	3.3

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



General Preference for Programme Sectors

(Radio: 2nd Quarter 2002)

	2002 2nd Quarter
Music	85.3
Local News	74.9
Foreign News	71.7
Discussions on Personal Problems	51.9
Health/Beauty/Home/Law	43.4
Religion	40.2
Women	36.1
Current Affairs	35.3
Culture	33.3
Novels/Plays	32.0
Sports	30.3
Money/Business	18.8
Children	17.5

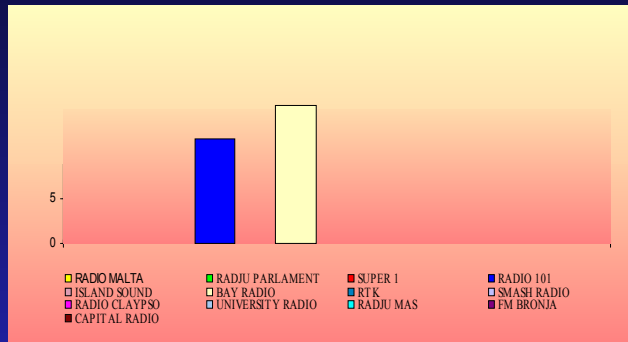
General Preference for Programme Sectors

(TV: 2002 – 2nd Quarter)

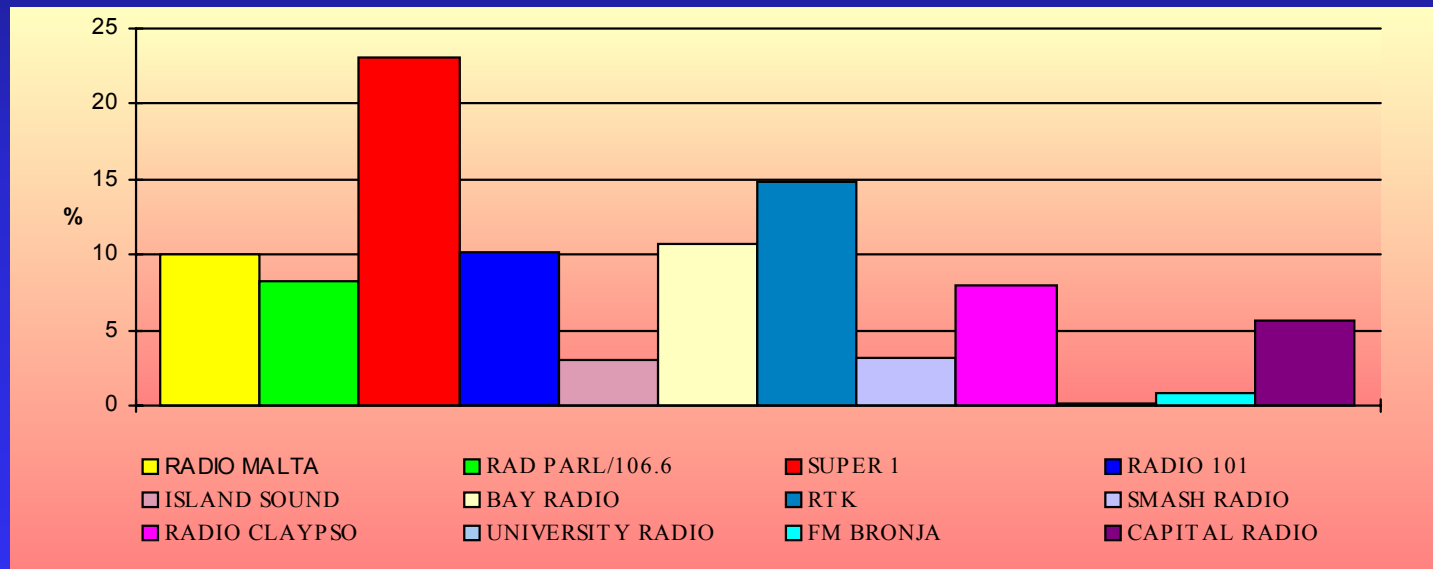
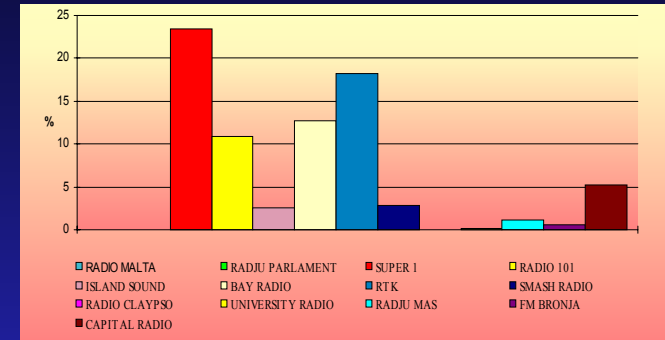
PROGRAMME SECTOR	2002 2nd Quarter
Foreign News	91.7
Local News	91.3
Feature Films	72.7
Discussions	69.2
Weather	68.6
Documentaries	59.3
Sports	55.0
Quizzes / Game Shows / Variety Programmes	51.6
Serials/Soap Operas	51.0
Plays	50.5
Women's Programmes	48.4
Current Affairs	42.9
Religion	42.9
Art & Culture	33.0
Children's Programmes	31.9
Music Video-Clips	26.4
Business & Finance	15.4

Overall Performance as 'Best' Radio Station

2001(a)

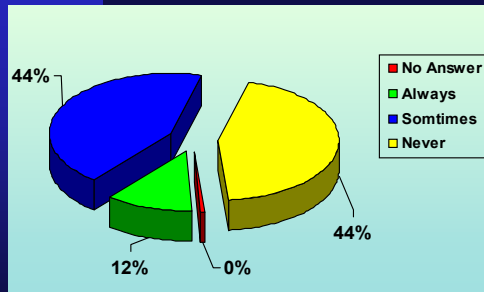


2001(b)

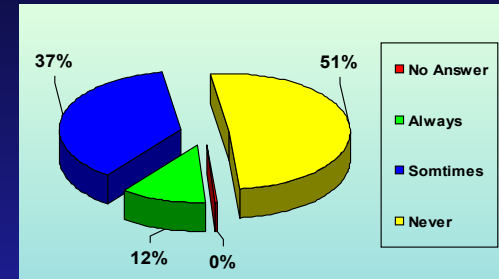


2nd Quarter 2002

Interest in Political Broadcasts (1999 – 2001)

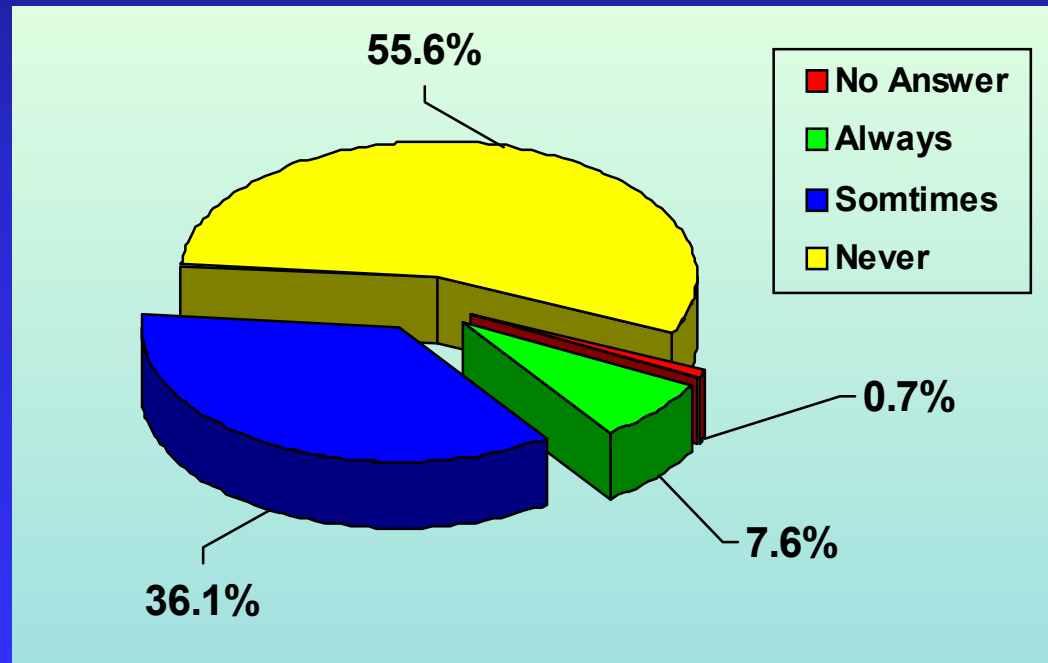


2001a



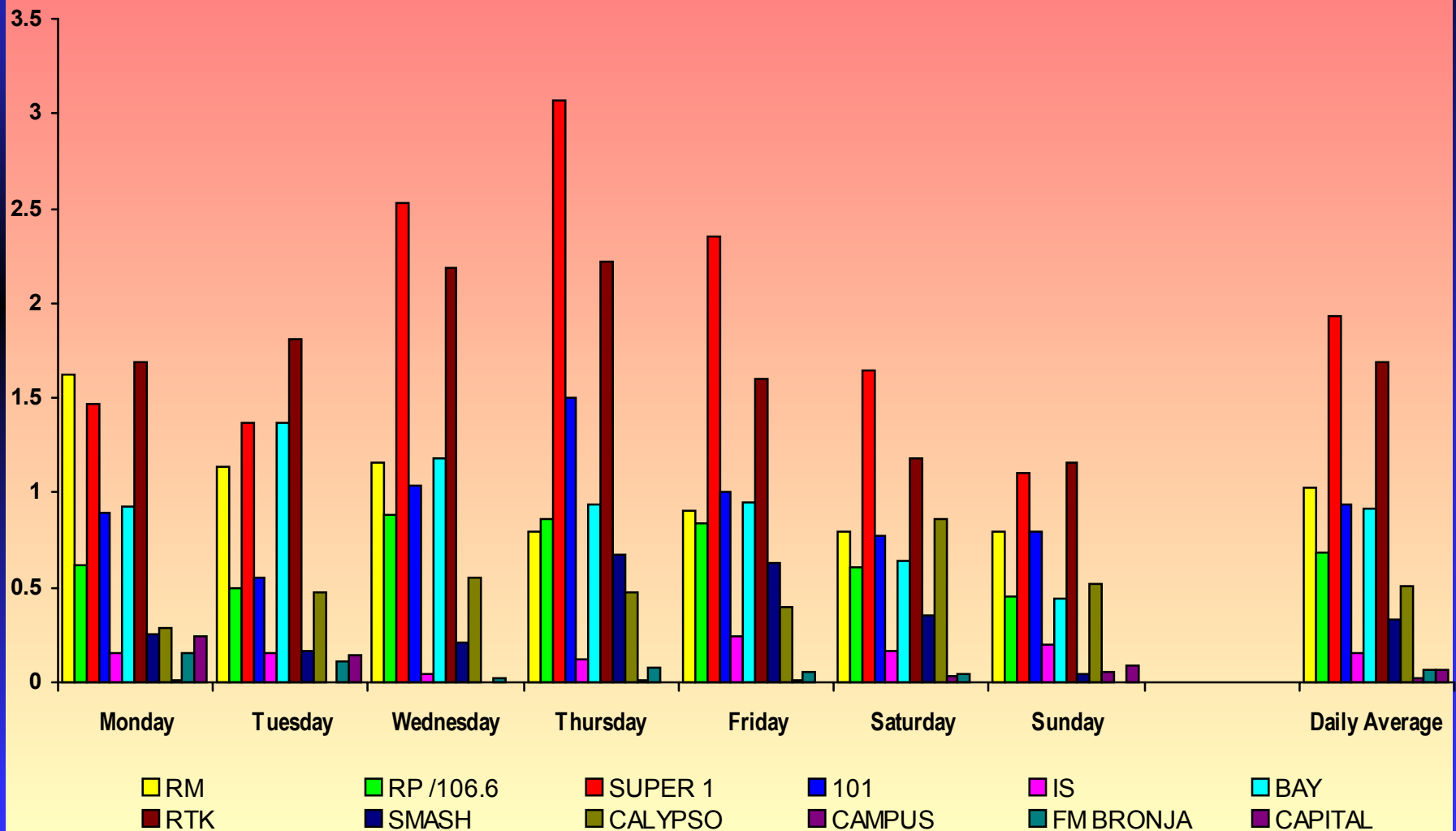
2001(b)

2nd Quarter
2002

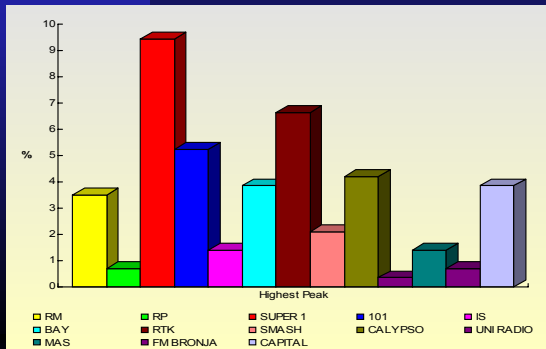


Daily Radio Average Audience Share

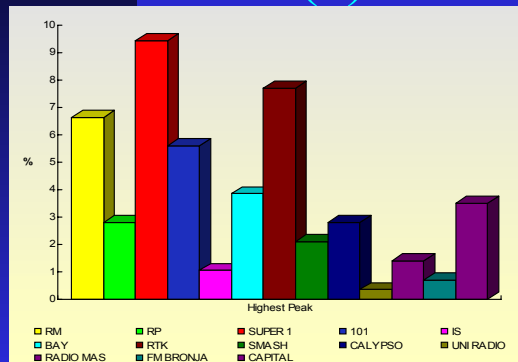
(Basis: Total No. of Transmission Hours)



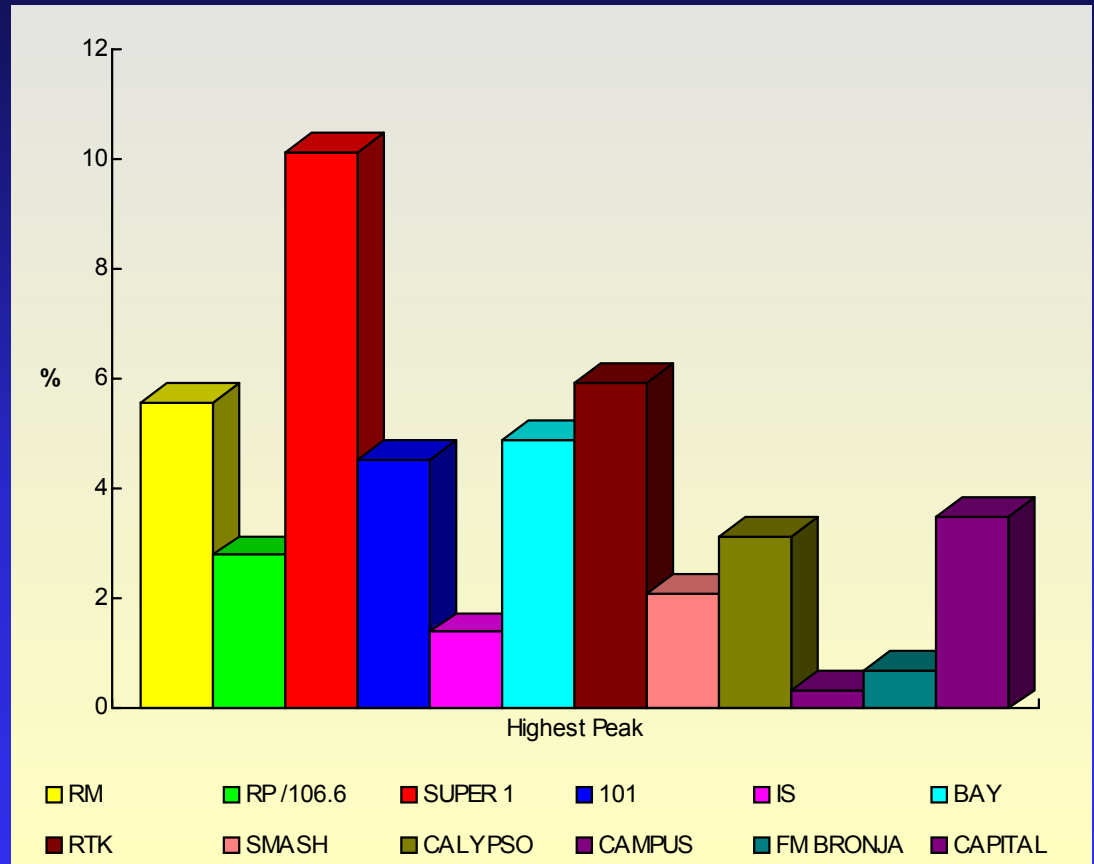
Highest Radio Station Peak Audience Share



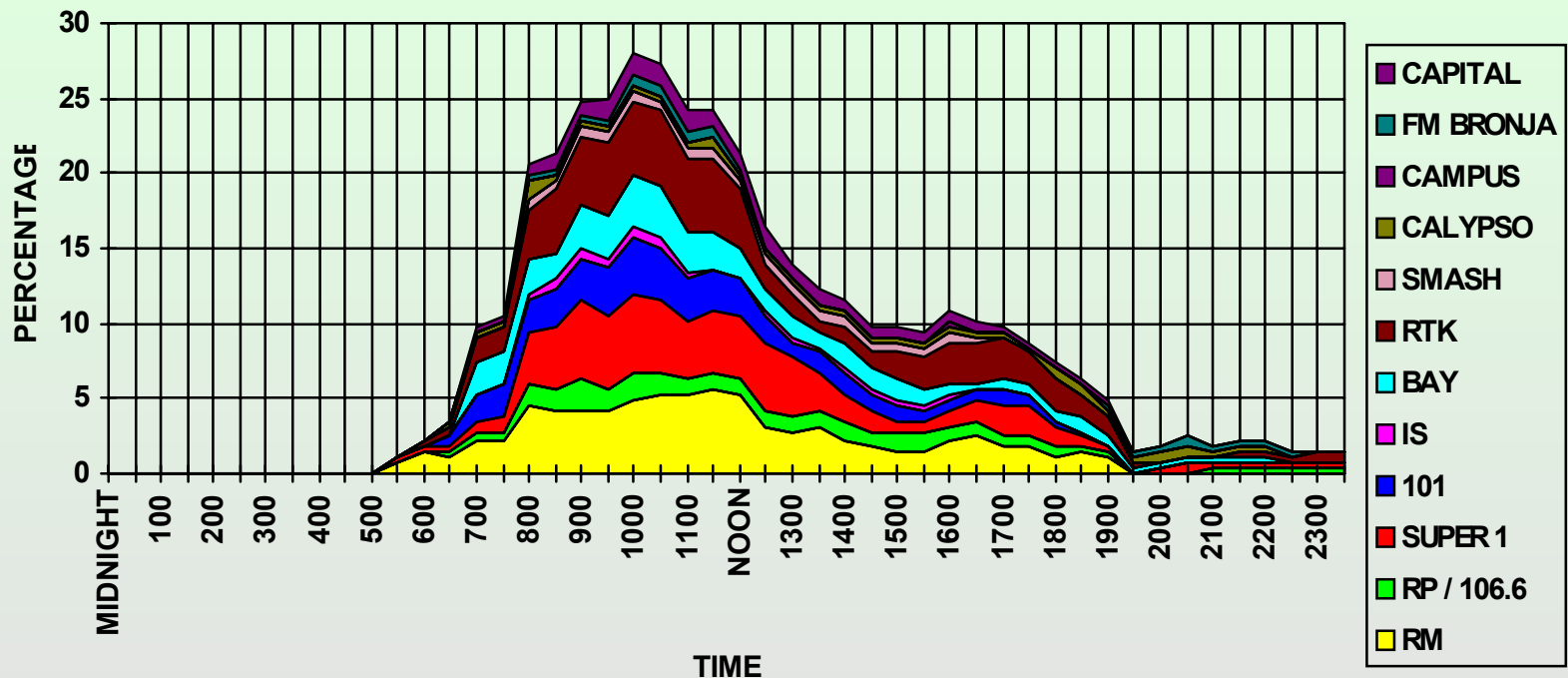
2001 (a)



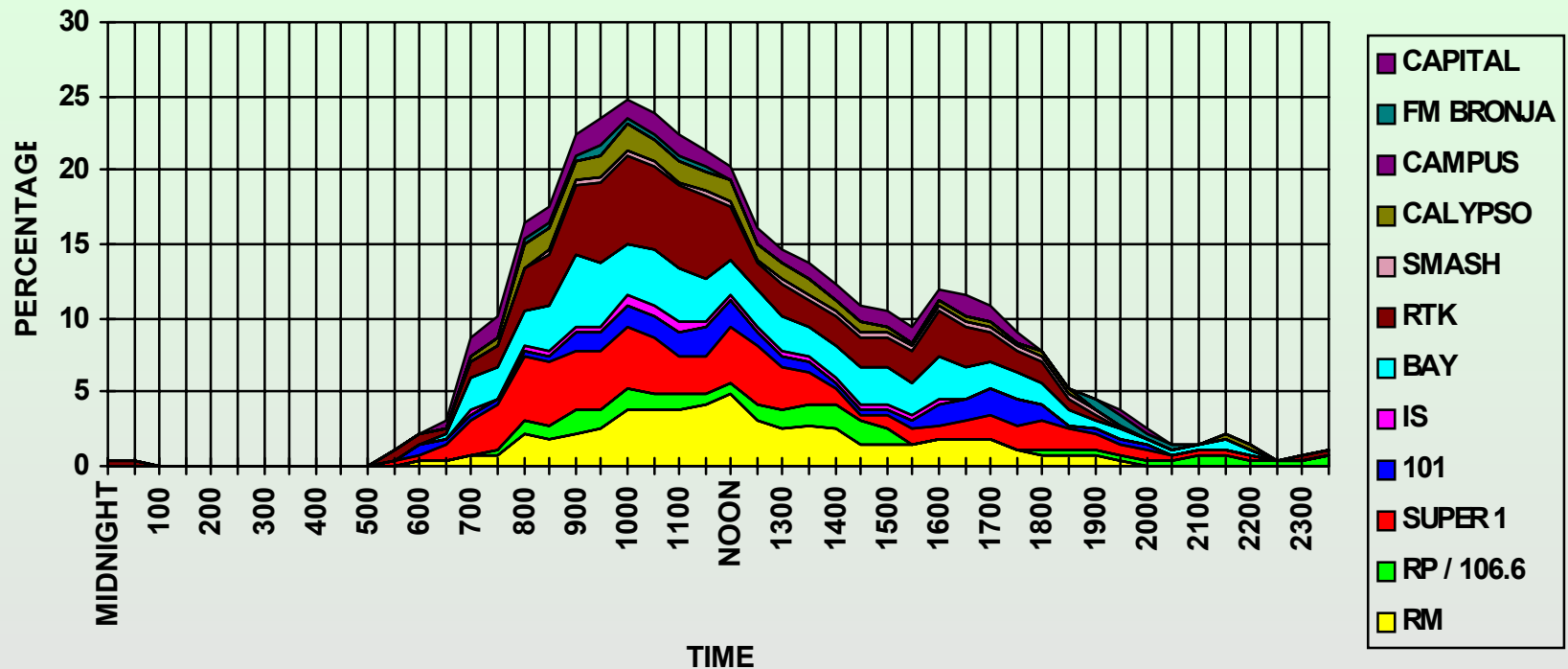
2001 (b)



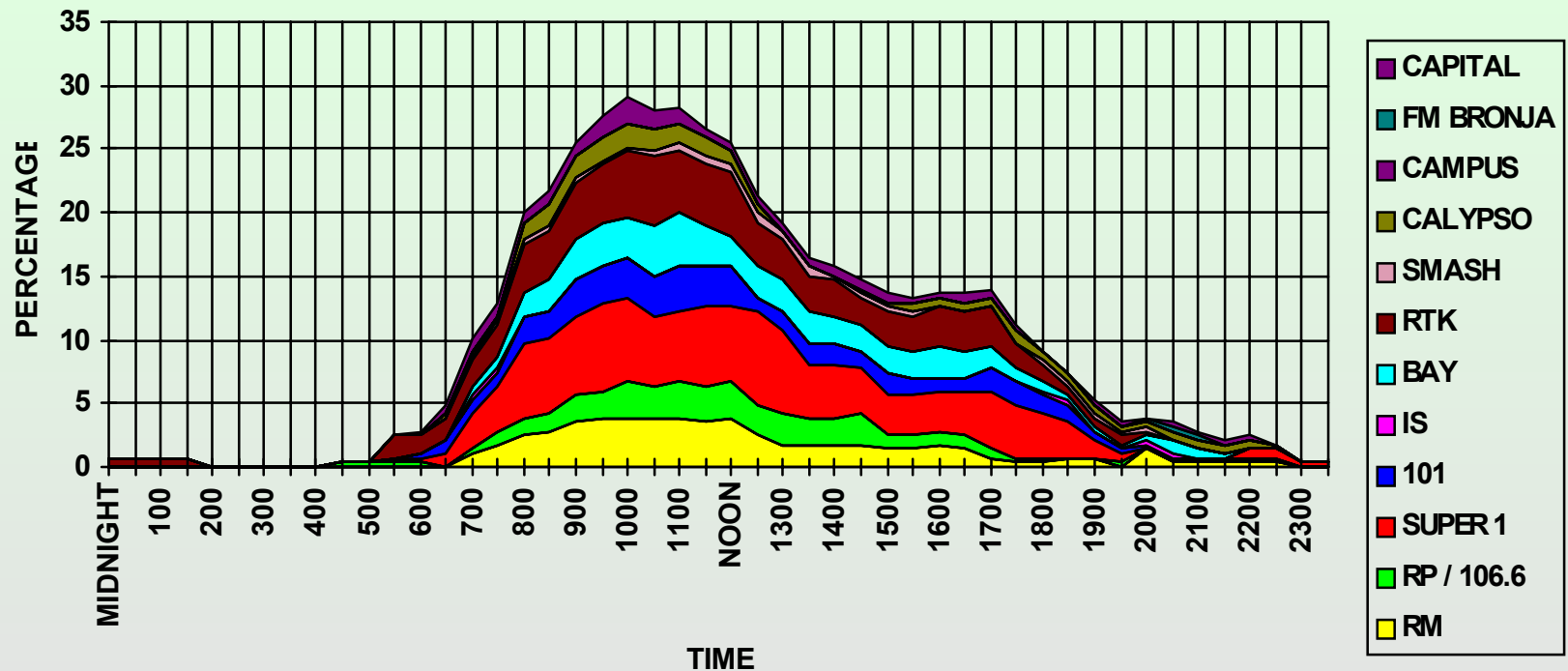
2nd Quarter 2002



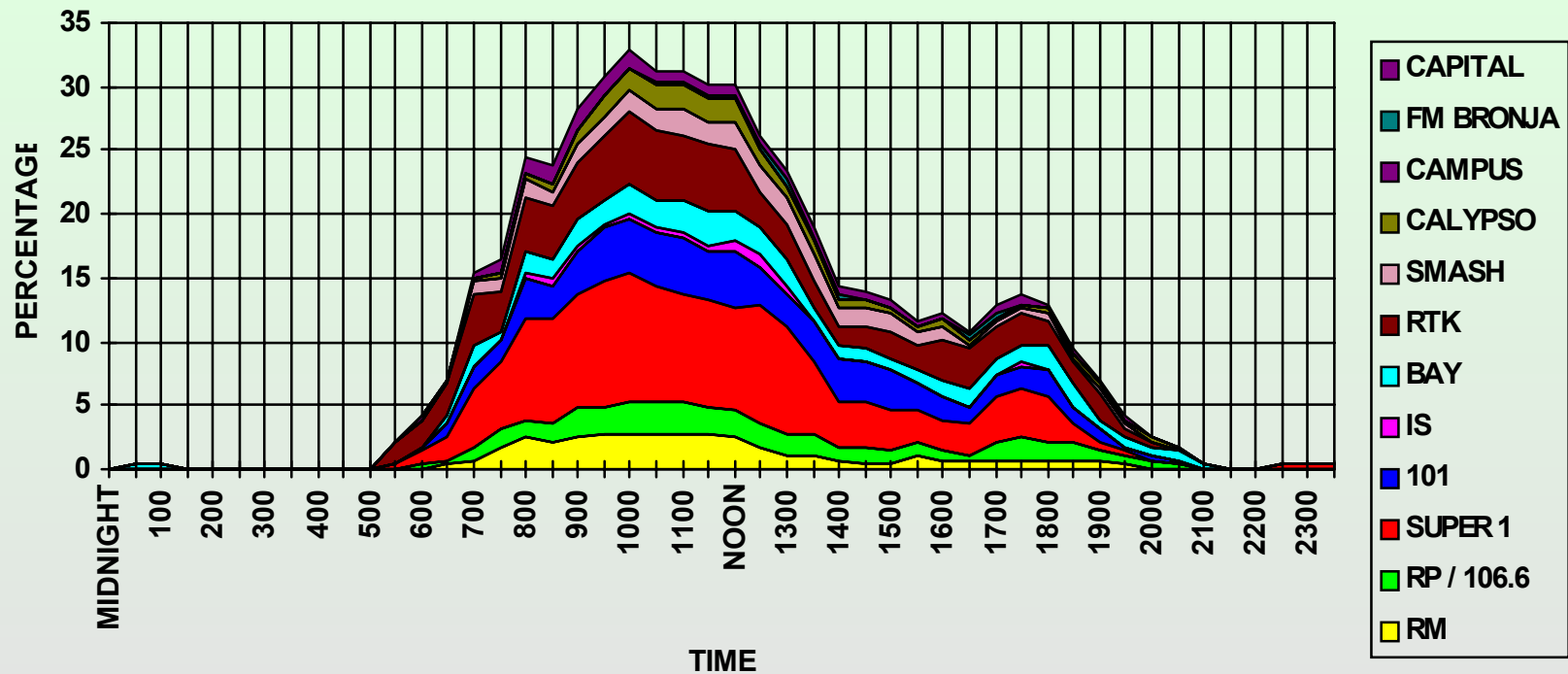
Radio Audiences: Tuesday



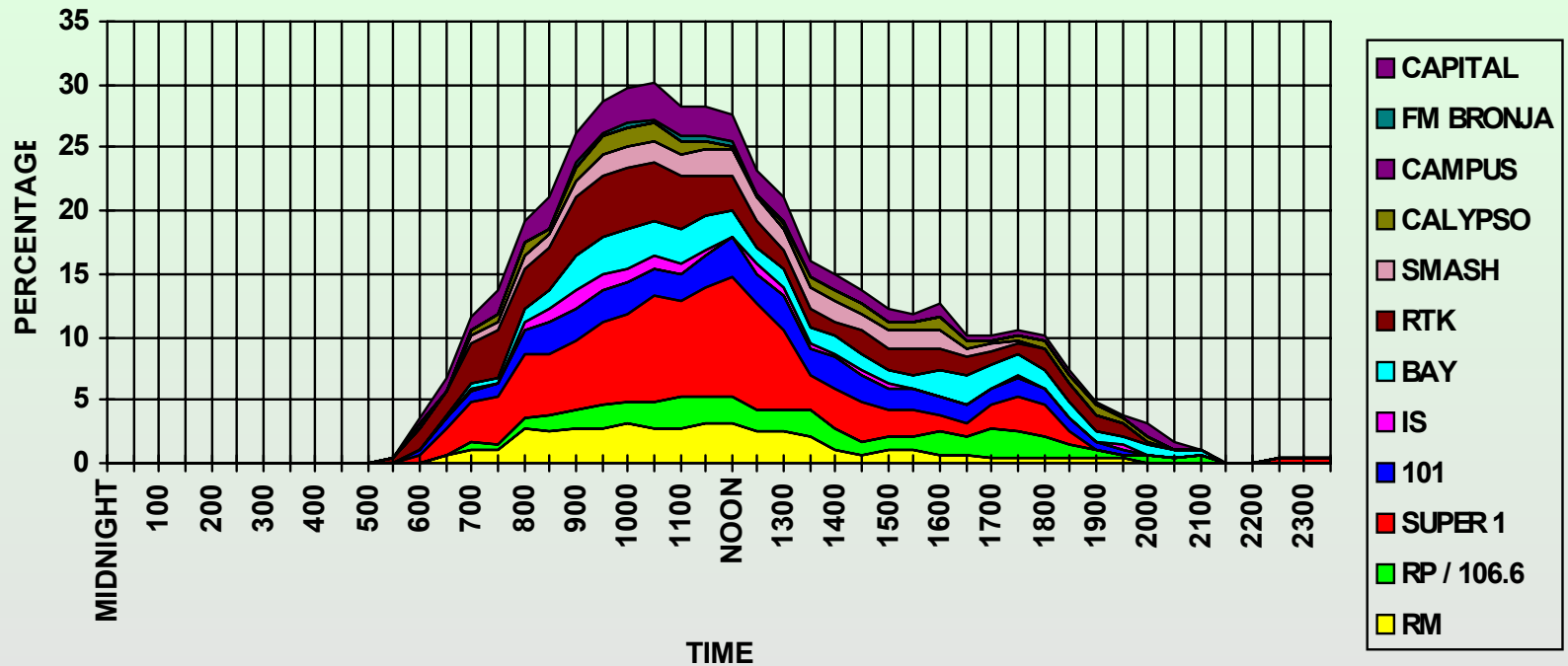
Radio Audiences: Wednesday

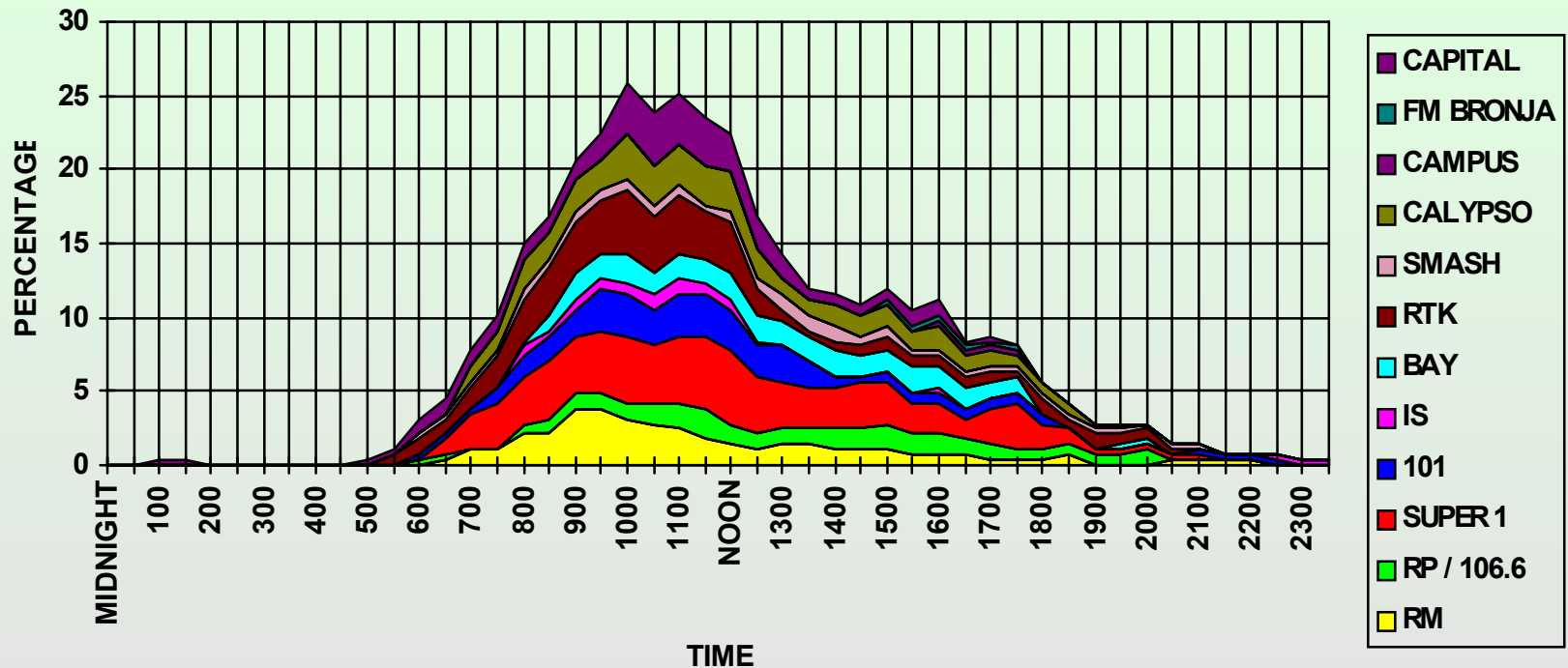


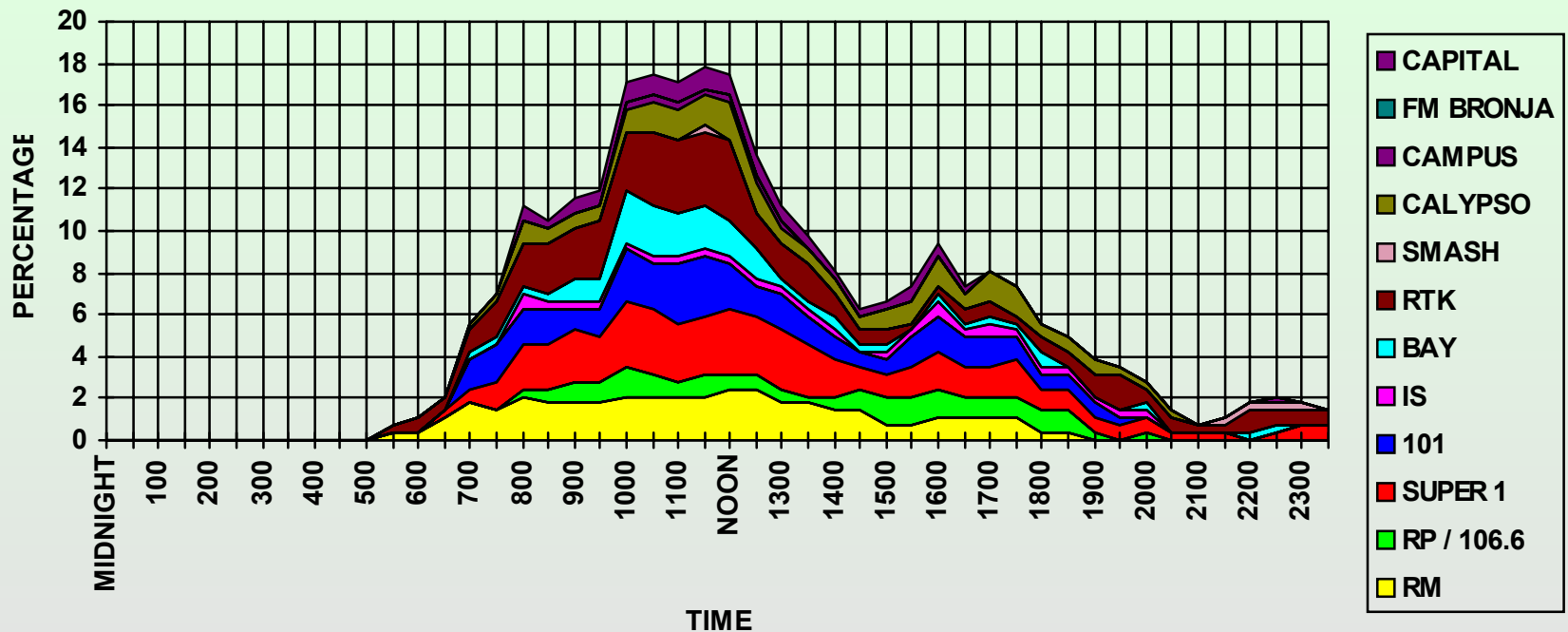
Radio Audiences: Thursday



Radio Audiences: Friday







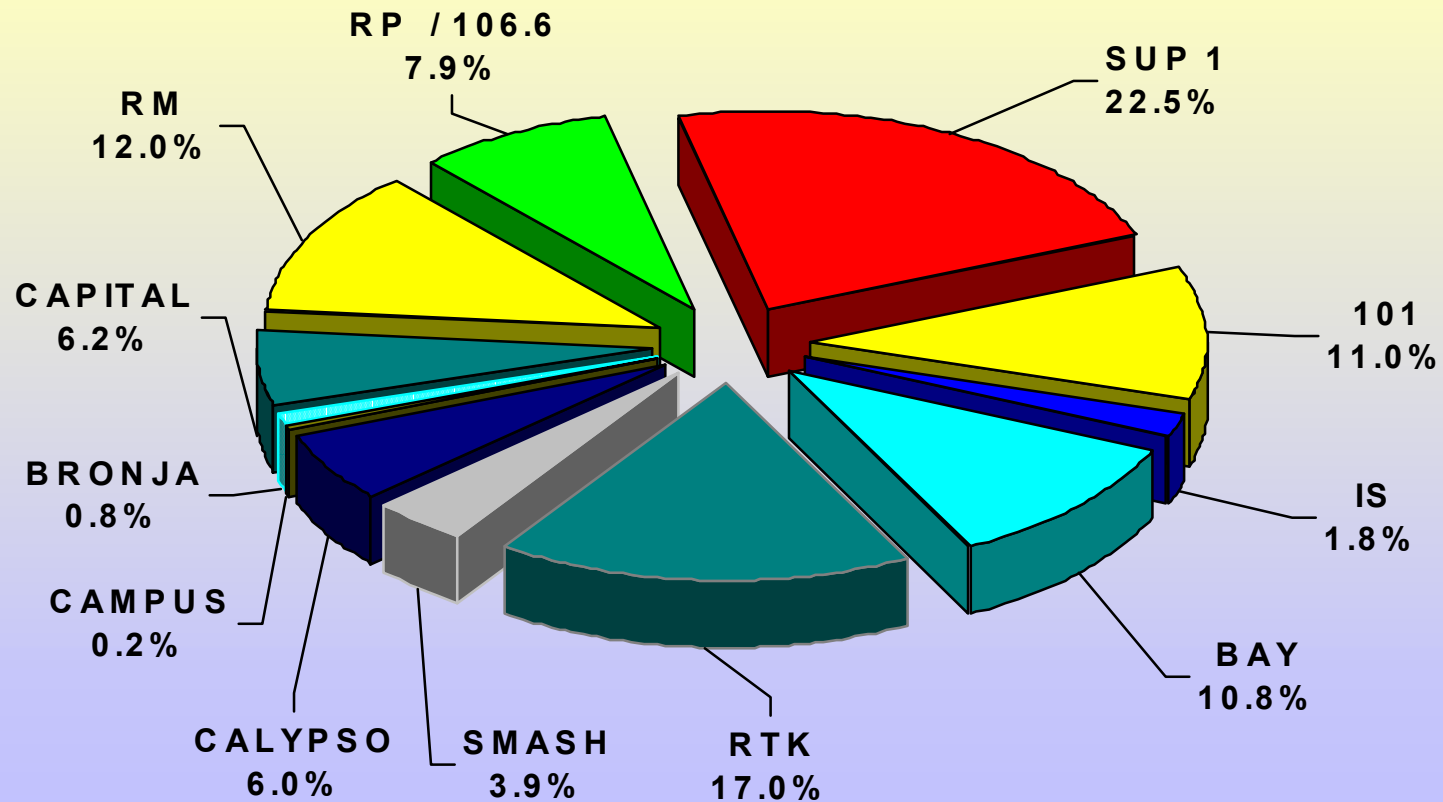
Meaning of %

- ❑ The meaning of 1% in the following pie chart refers to the average share of audience for each time-slot if each time-slot were to be 'full to capacity'. They vary for EVERY STUDY.
- ❑ 2nd Quarter 2002
 - ❖ Radio:
 - All Available Slots: 1% = 269 persons
 - 6.00 – Midnight: 1% = 357 persons
 - ❖ TV:
 - B1: 1% = 93 persons
 - B2: 1% = 327 persons
 - B3: 1% = 1084 persons

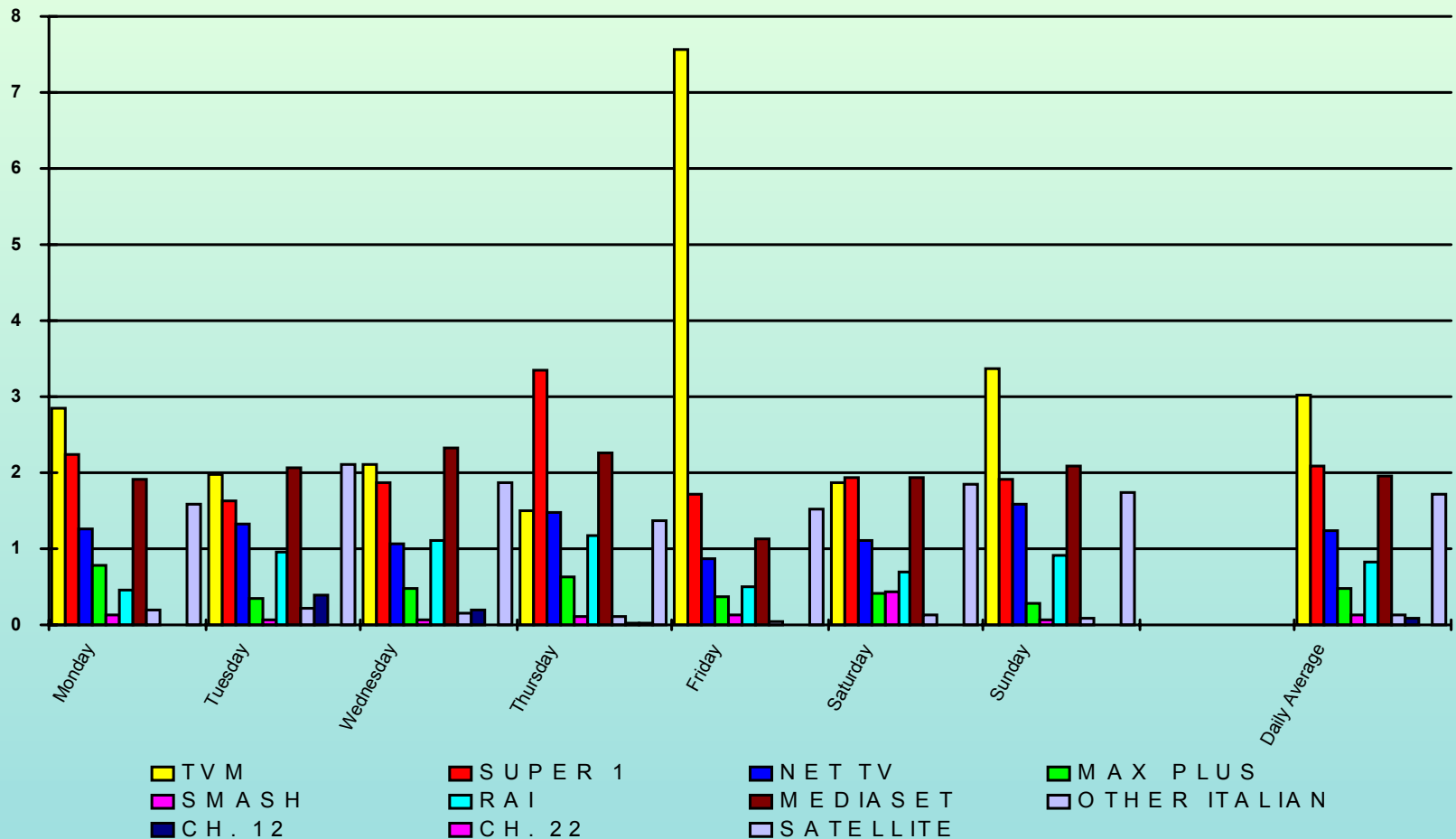
Daily Average Radio Audience Levels:

2nd Quarter 2002

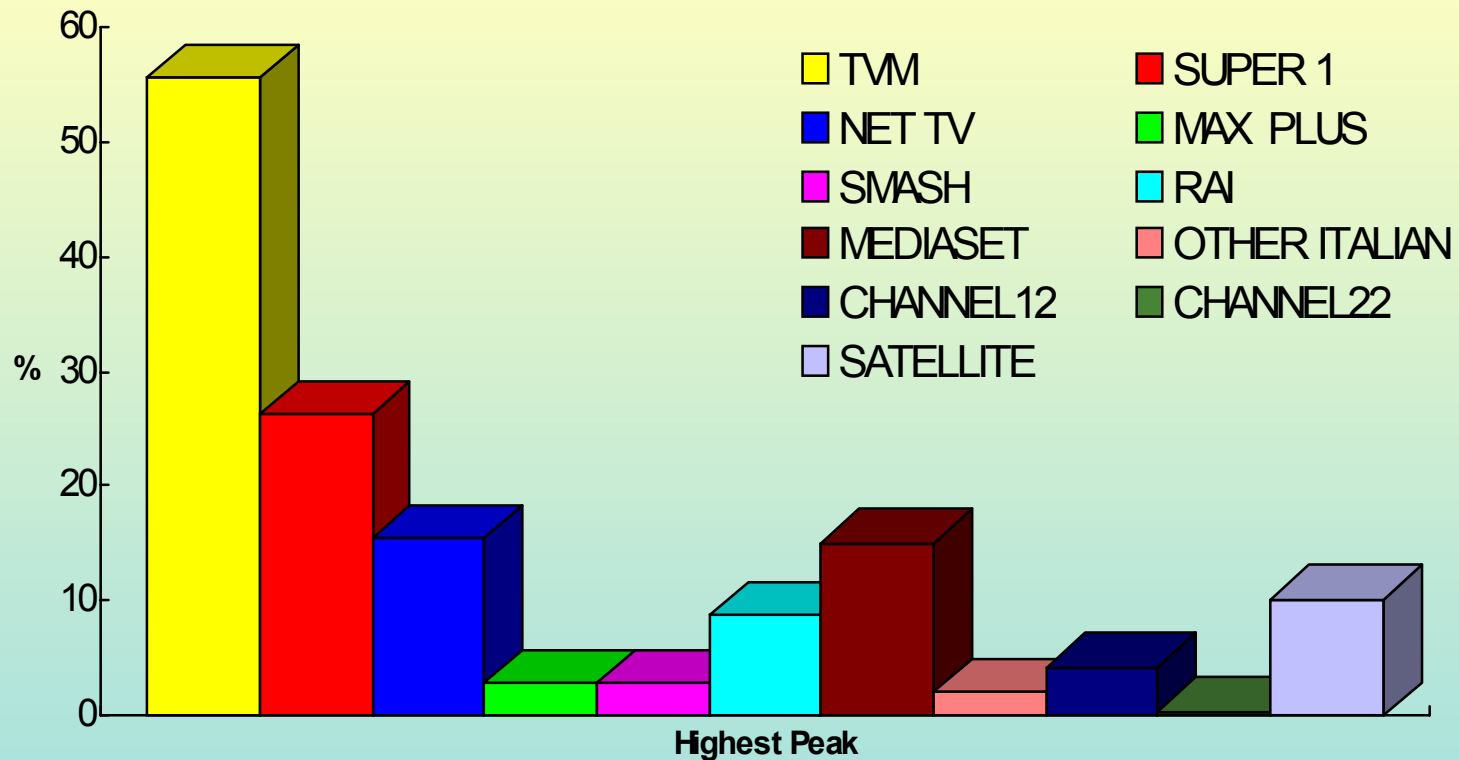
(Basis: 6.00 a.m - Midnight)



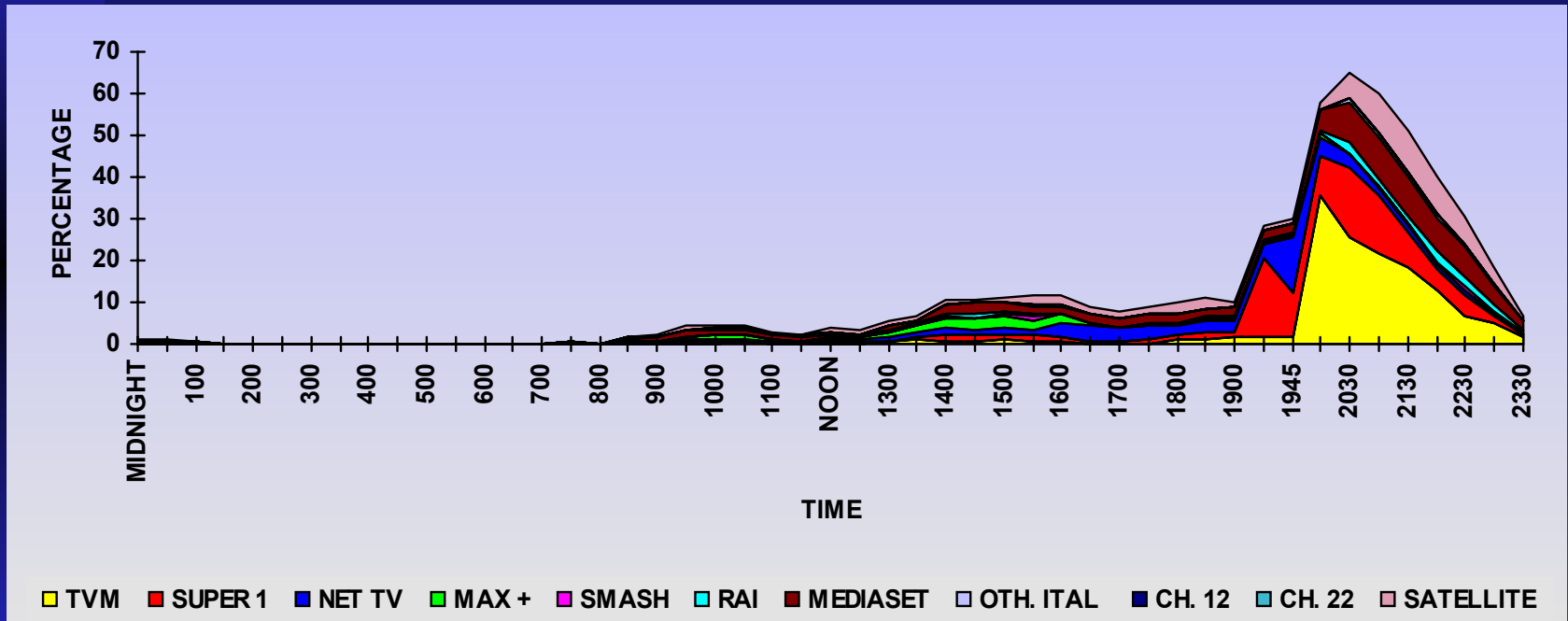
Daily TV Average Audience Share (Basis: Hours of Transmission by Station)



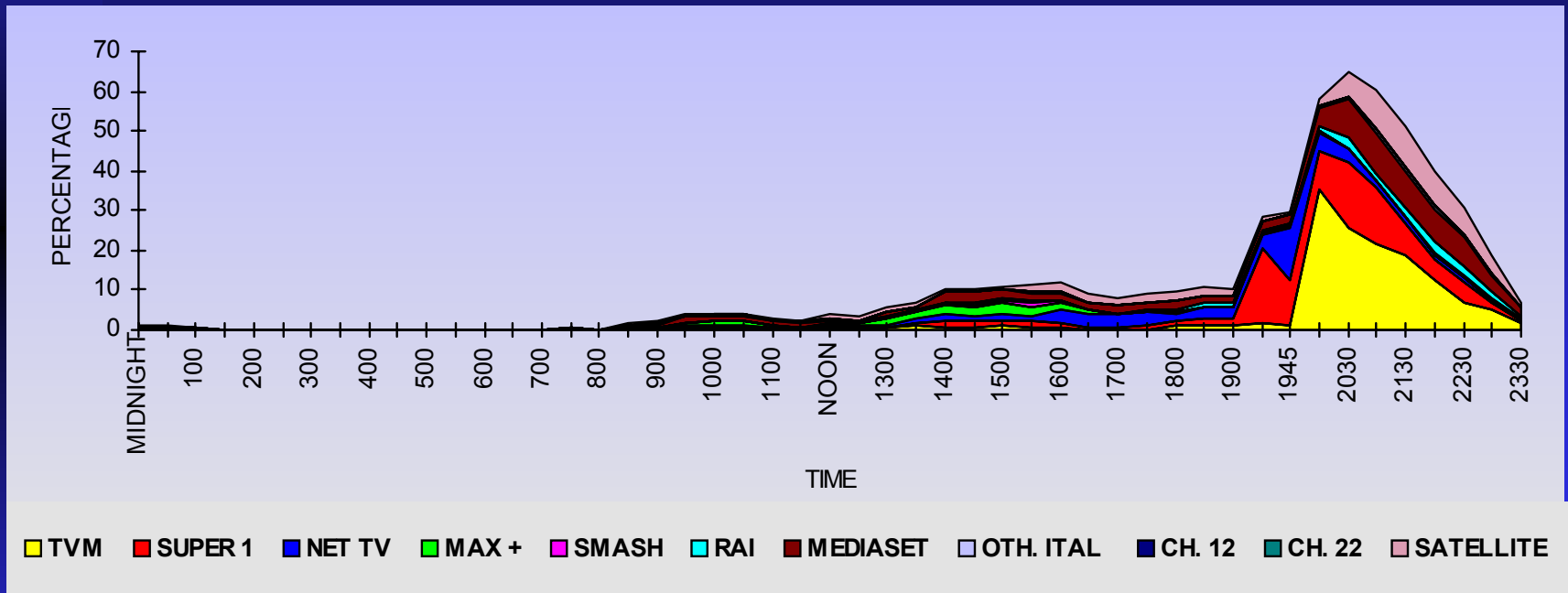
Highest TV Channel Peak Audience Share



TV Viewing: Monday

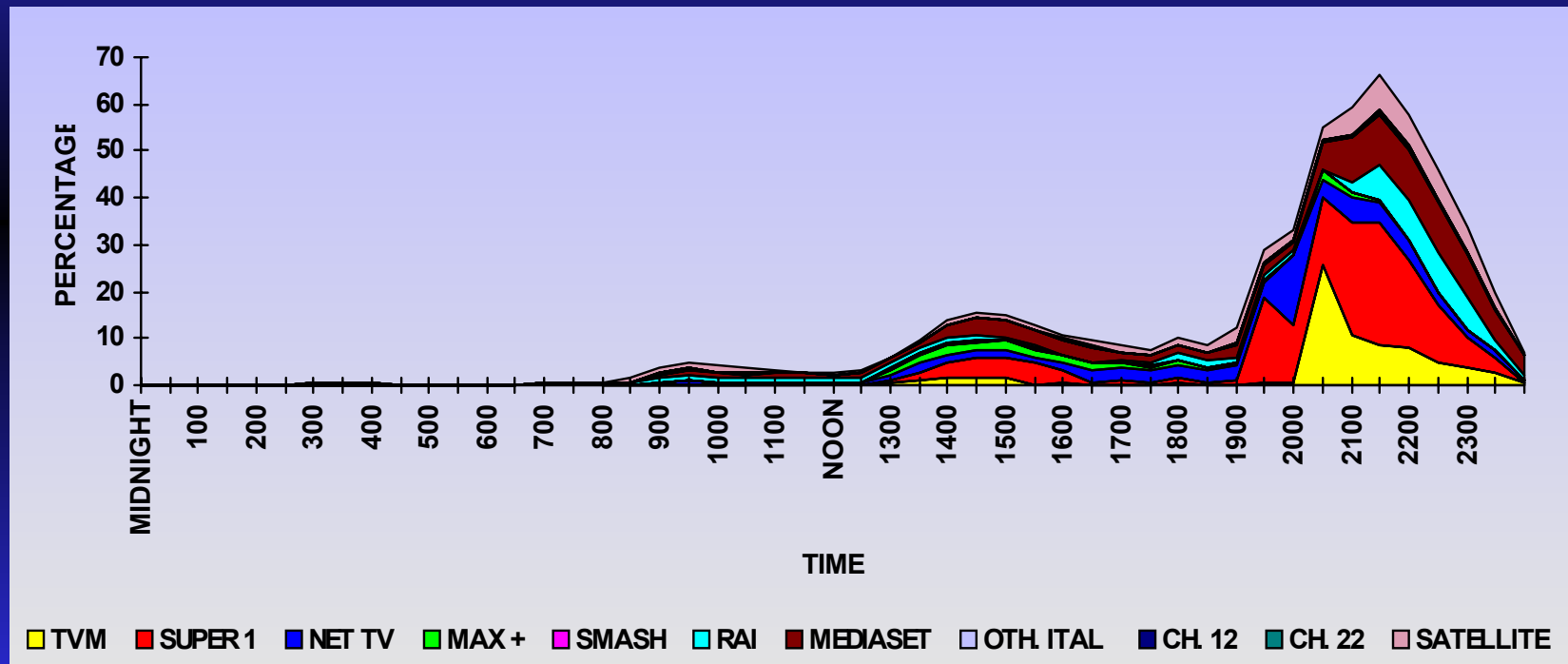


TV Viewing: Tuesday

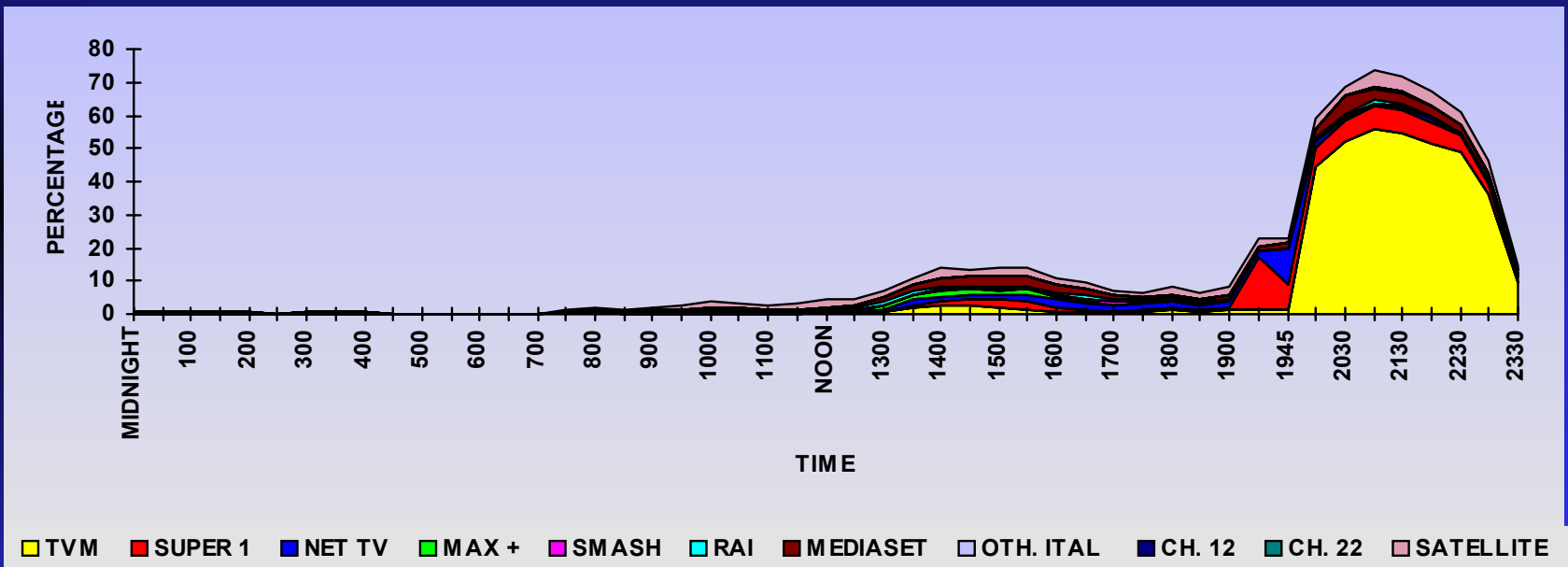




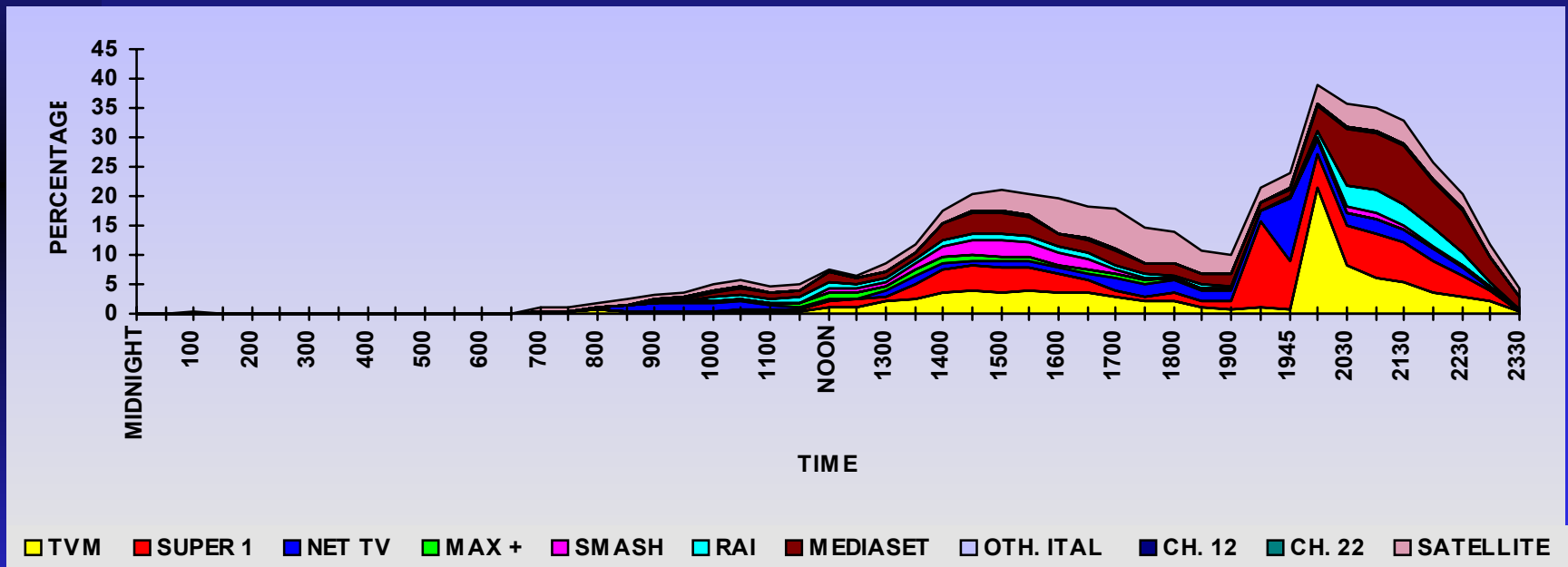
TV Viewing: Thursday



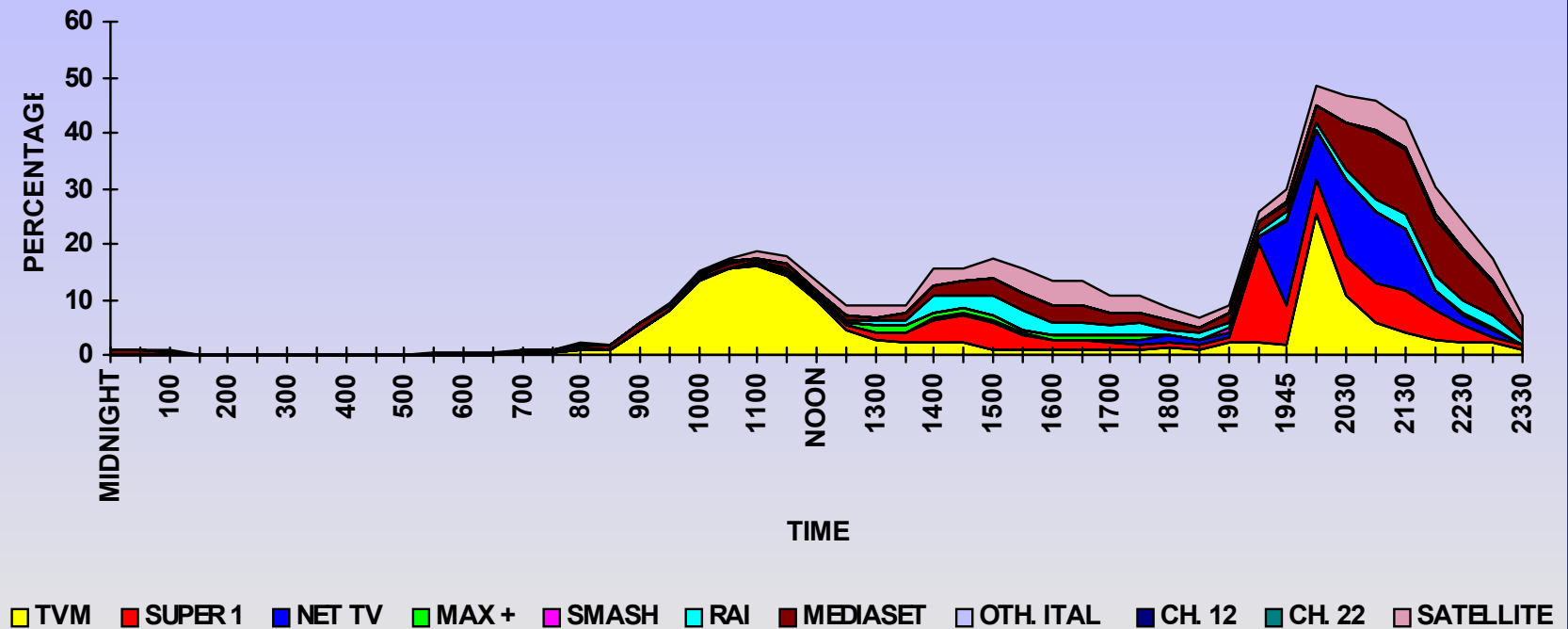
TV Viewing: Friday



TV Viewing: Saturday

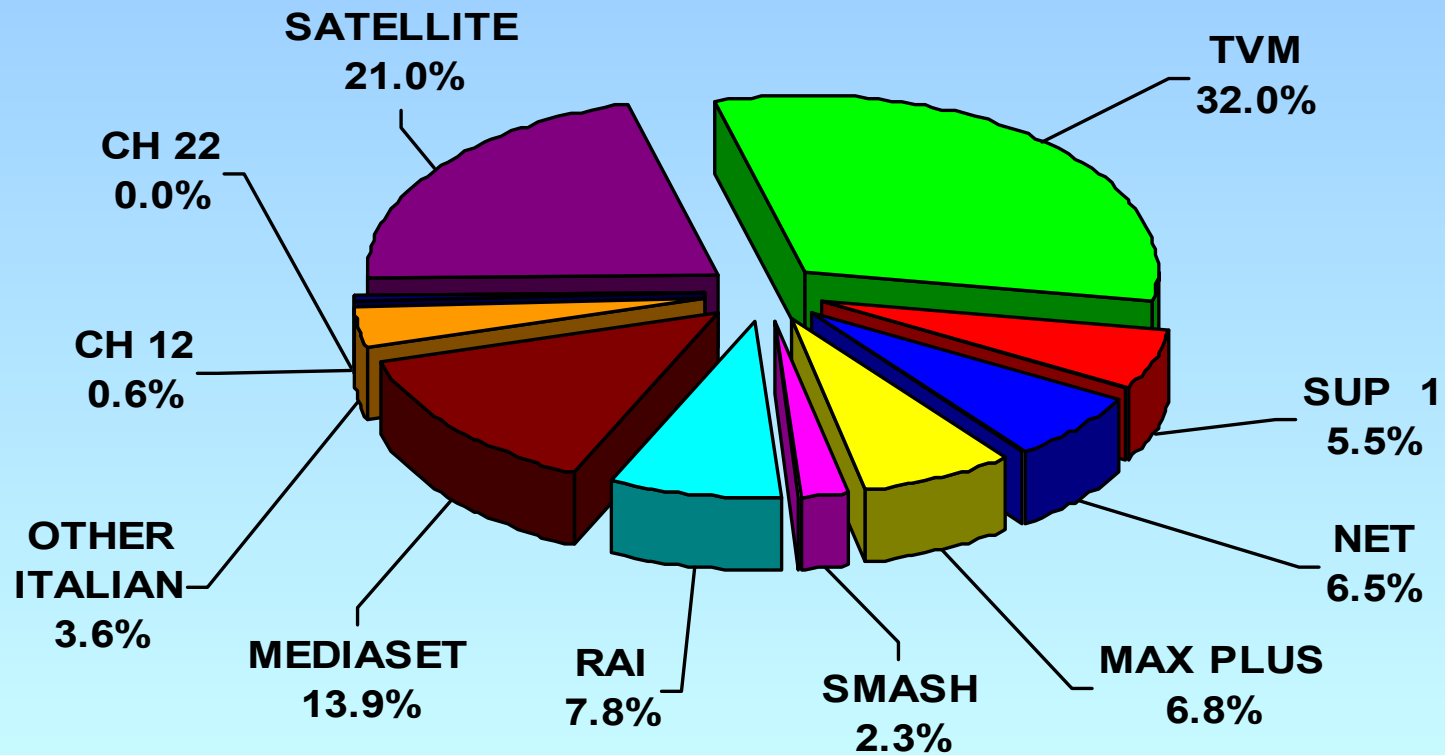


TV Viewing: Sunday



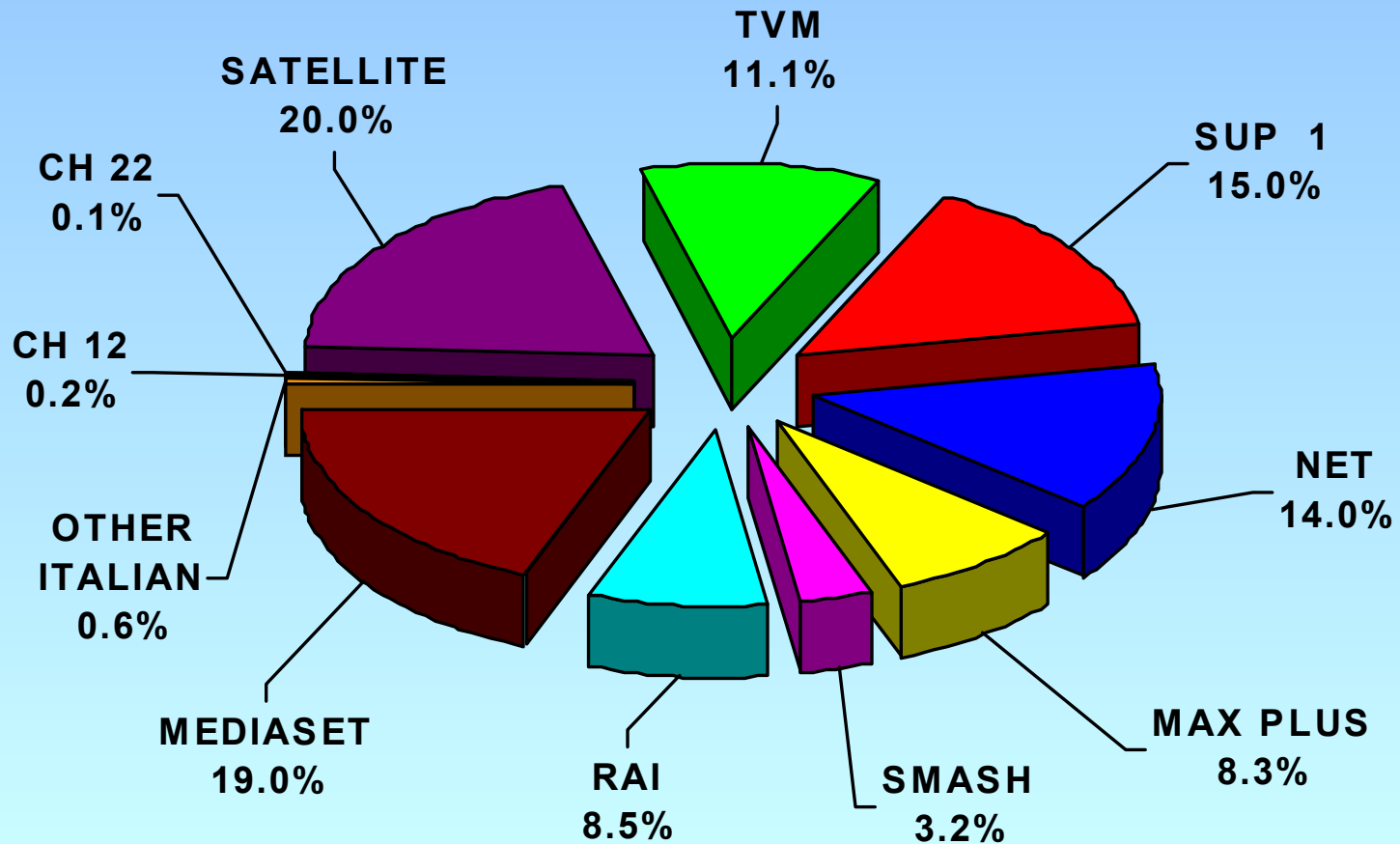
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



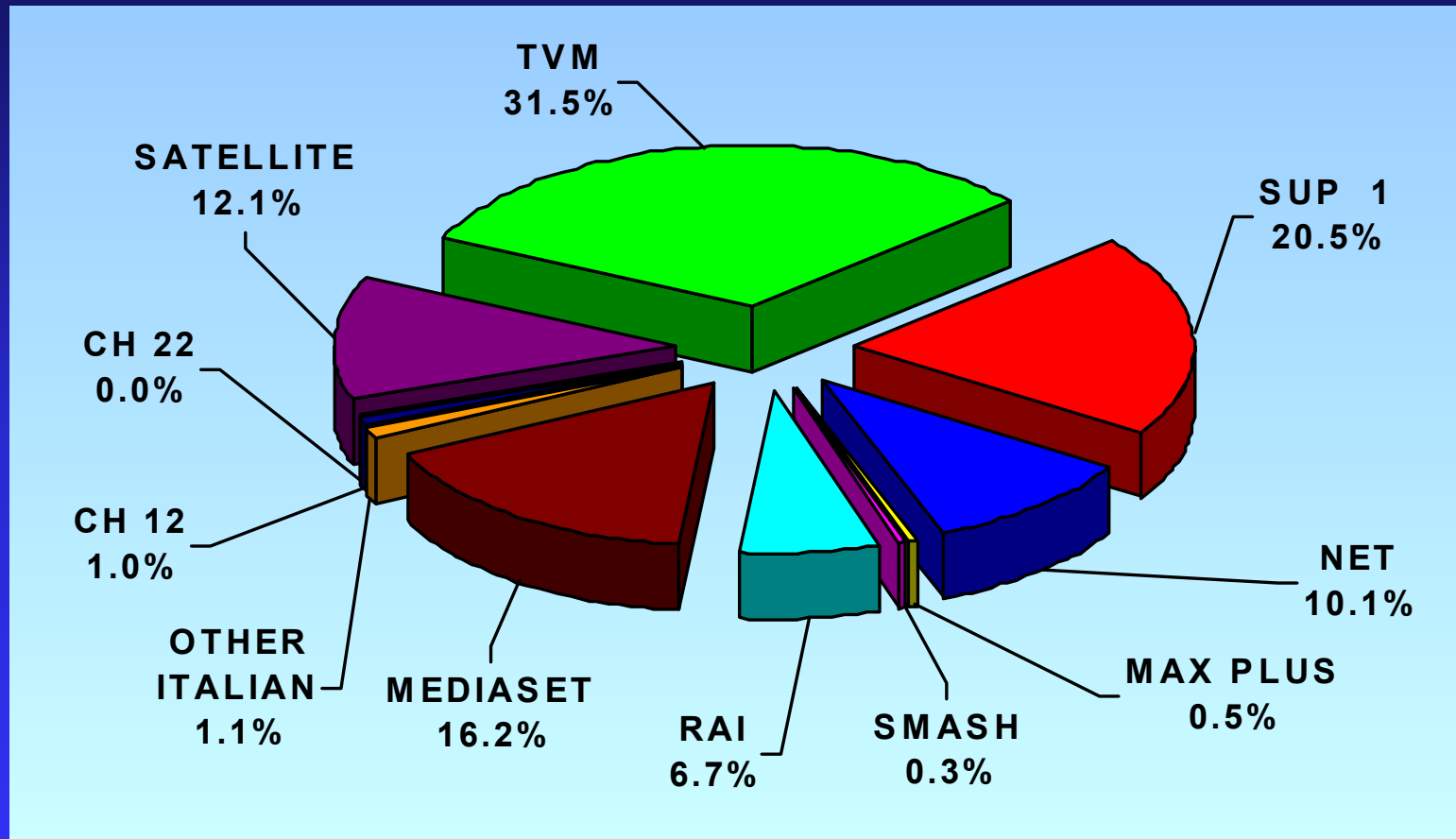
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



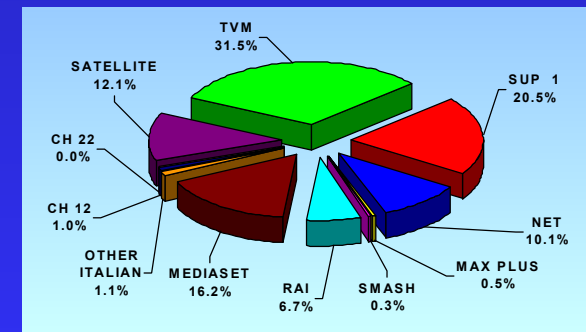
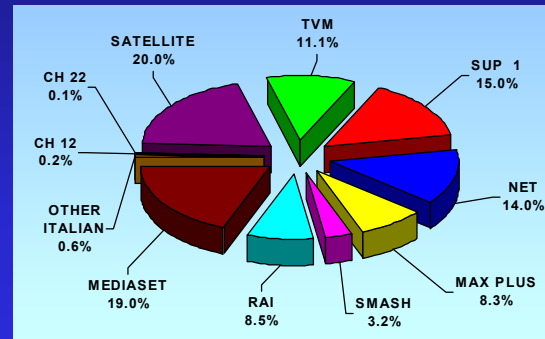
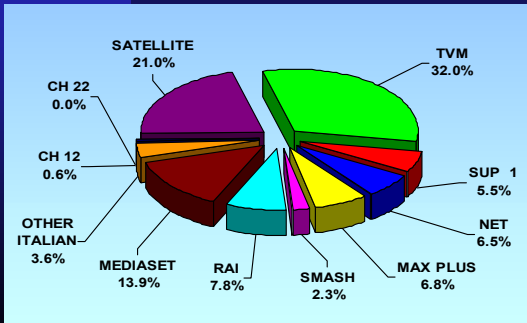
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



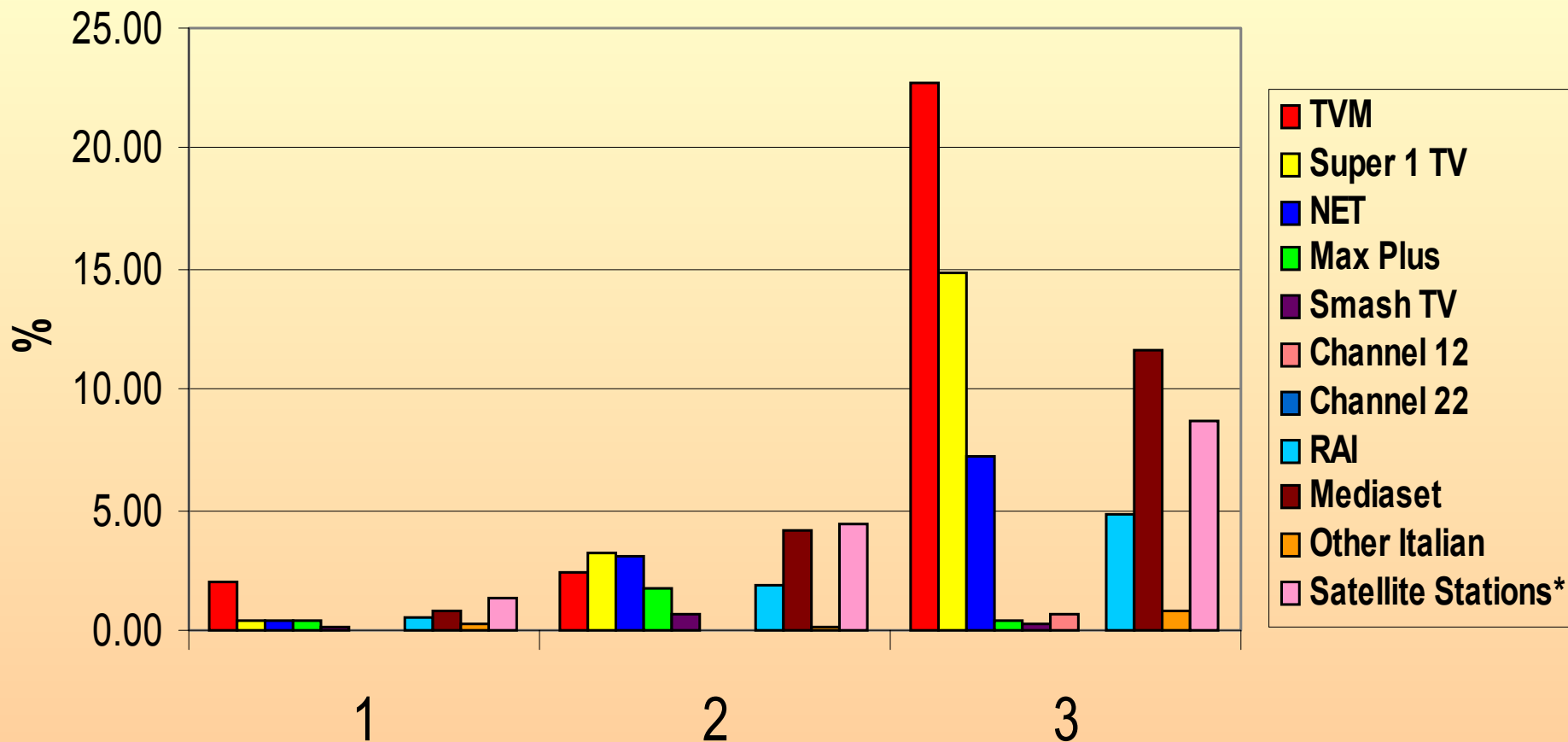
Daily Average TV Audience Levels

Time-Band Comparison



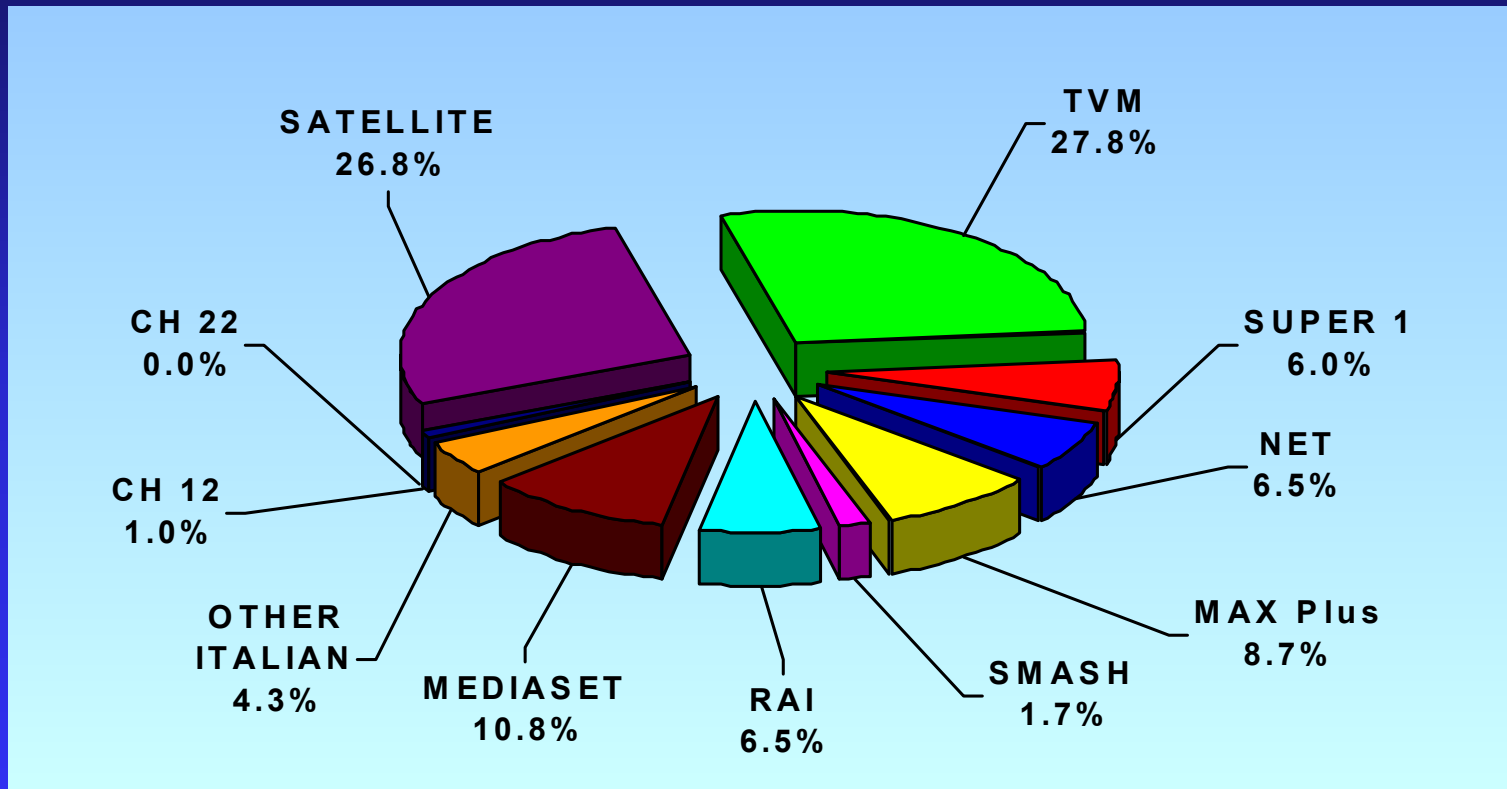
Daily Average TV Audience Levels

Time-Band Comparison in terms of Absolute Audience Size
2nd Quarter 2002



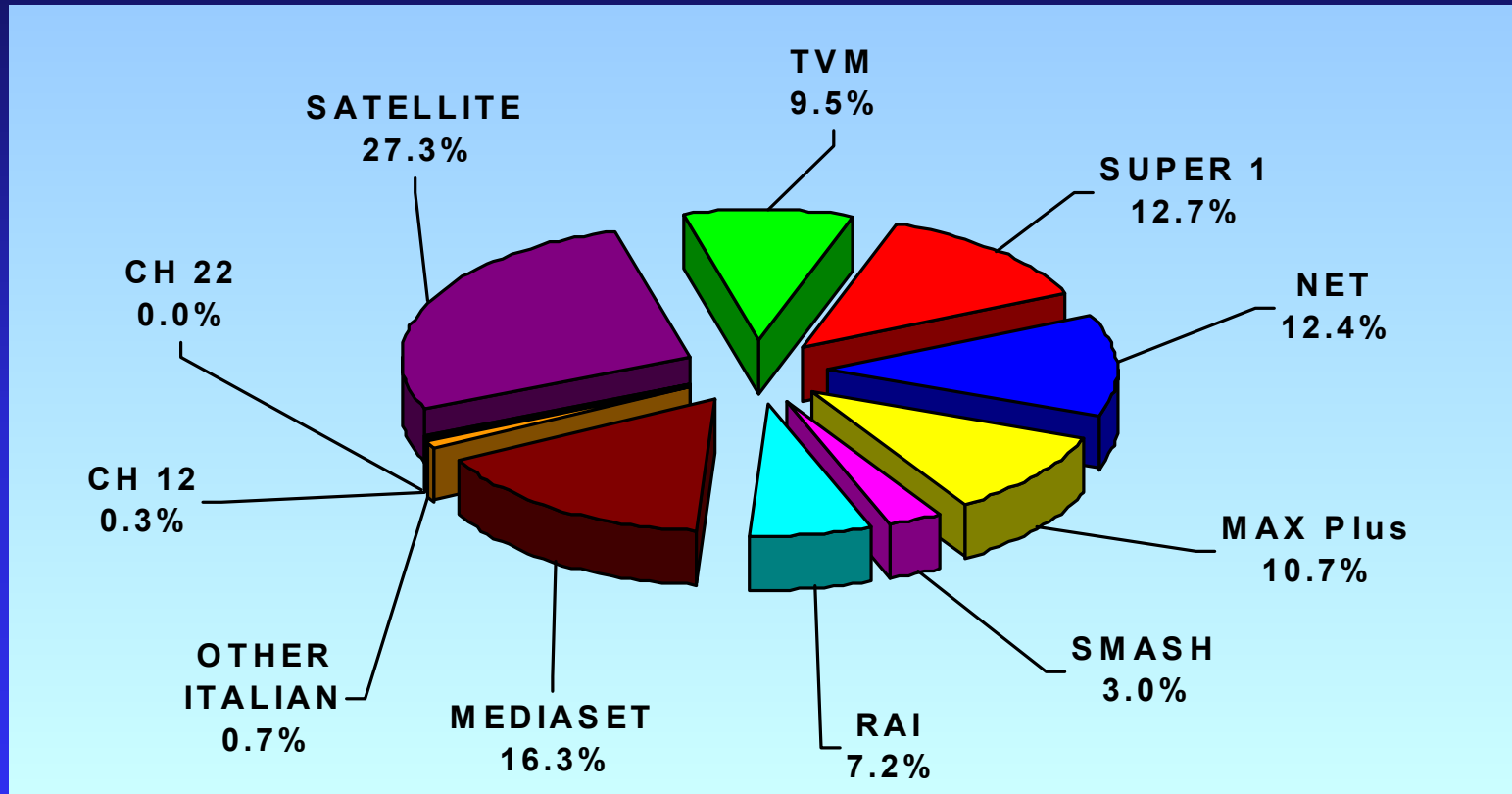
Daily Average TV Audience Levels

Cable Only - Time-Band 1: 0600 hrs -Noon



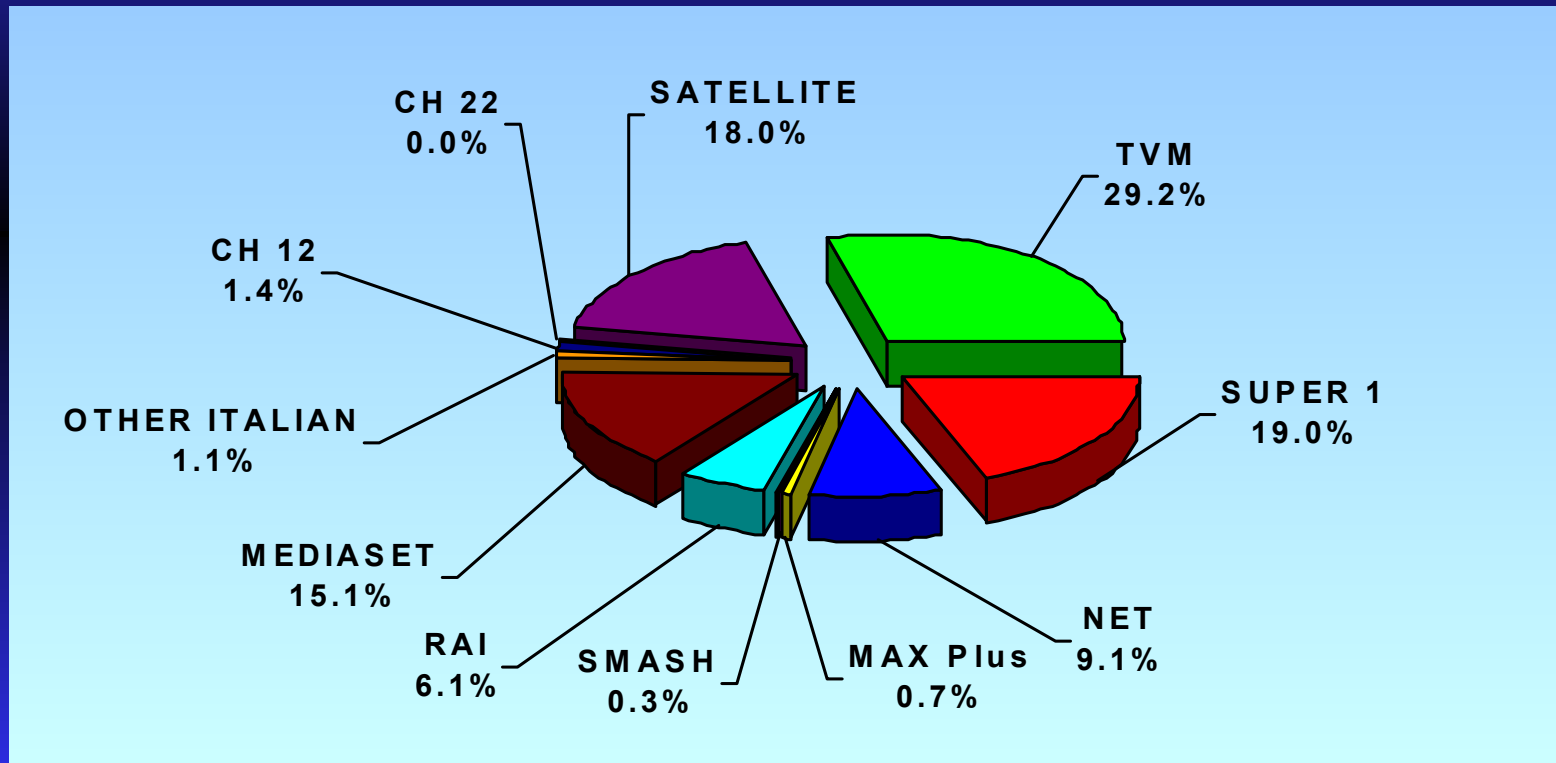
Daily Average TV Audience Levels

Cable Only - Time-Band 2: Noon – 1900 hrs



Daily Average TV Audience Levels

Cable Only - Time-Band 3: 1900 hrs - Midnight



Time-Band Comparison - All

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	32.0	11.1	31.5
Super 1 TV	5.5	15.0	20.5
NET	6.5	14.0	10.1
Max Plus	6.8	8.3	0.5
Smash TV	2.3	3.2	0.3
Channel 12	0.6	0.2	1.0
Channel 22	0.0	0.1	0.0
RAI	7.8	8.5	6.7
Mediaset	13.9	19.0	16.2
Other Italian	3.6	0.6	1.1
Satellite Stations*	21.0	20.0	12.1

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	27.8	9.5	29.2
Super 1 TV	6.0	12.7	19.0
NET	6.5	12.4	9.1
Max Plus	8.7	10.7	0.7
Smash TV	1.7	3.0	0.3
Channel 12	1.0	0.3	1.4
Channel 22	0.0	0.0	0.0
RAI	6.5	7.2	6.1
Mediaset	10.8	16.3	15.1
Other Italian	4.3	0.7	1.1
Satellite Stations*	26.8	27.3	18.0

Conclusions:

- ❑ Radio audiences are declining in absolute size
- ❑ Morning and afternoon TV audience are growing, evening audiences are declining in absolute size

Radio Stations: Relative Strengths

6.00 a.m. - Midnight

- Super 1 – 22.5%
- RTK – 17%
- Radju Malta – 12%
- Radio 101 – 11%
- Bay Radio – 10.8%
- Radju Parlament – 7.9%
- Capital – 6.2%
- Calypso – 6%
- Smash – 3.9%
- Island Sound – 1.8% Radju
FM Bronja – 0.8%
- Campus FM – 0.2%

Source for News

- Main source remains TV
- Music & Local News are the two programme segments that generate most interest on radio
- Foreign News & Local are the two programme segments that generate most interest on TV

TV Programmes Popularity

- News Bulletin continues to register very high but not always the highest audience level
- Some programmes exceed their respective station's news bulletin
- *Xarabank* remains the programme with the highest audience level throughout

Trends in TV Audiences

- ❑ Direct comparisons with previous years not possible because this is the first study conducted during the second quarter of the year
- ❑ TVM has the largest audiences in Time Bands 1 & 3
- ❑ Super 1 is best station in Time-Band 2
- ❑ TVM has the largest audience in absolute terms with *Xarabank*

NOTE: Absolute Audience size is not the same in the three time-bands: largest audience is to be found in Time-Band 3

Thank you for your attention!

BA Audience Audit April 2002

