

TV & Radio Audiences in Malta

Broadcasting Authority

Mario Vassallo

1st Quarter 2001

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...”

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	18.3	18.8	17.8
over 65	12.6	11.5	13.7
TOTAL	100.0	100.0	100.0
N=	1001	489	511
	100	49.0	51.0

Who Listens to Radio

	Total	Male	Female
N=	1001	489	512
	%	%	%
Listen to the Radio	74.4	73.8	75.0
Do Not Listen to the Radio	25.6	26.2	25.0

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	745	361	384
	%	%	%
Varies Considerably	1.7	1.4	2.1
One Hour	34.9	41.0	29.2
Two Hours	18.8	19.8	17.7
Three Hours	9.7	8.3	10.9
Four to Nine Hours	29.0	22.5	35.2
Ten Hours and more	5.9	7.0	4.9

Where is Radio Listened to

	Total	Male	Female
N=	745	361	384
	%	%	%
NA	0.9	1.1	0.8
At home	73.2	61.5	84.1
At work	17.2	24.1	10.7
In the car	29.4	41.0	18.5

Who watches TV

	Total	Male	Female
N=	1001	489	512
	%	%	%
Watch TV	98.2	97.8	98.6
Do Not watch TV	1.8	2.2	1.4

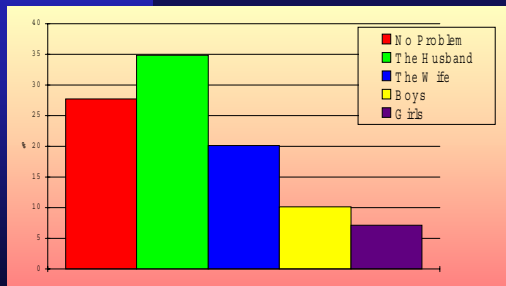
Average No. of Hours TV is watched

	Total	Male	Female
N=	983	478	505
	%	%	%
Varies Considerably	0.4	0.6	0.2
One Hour	13.2	13.2	13.3
Two Hours	30.3	32.0	28.7
Three Hours	24.8	23.8	25.7
More than three Hours	31.3	30.4	32.1

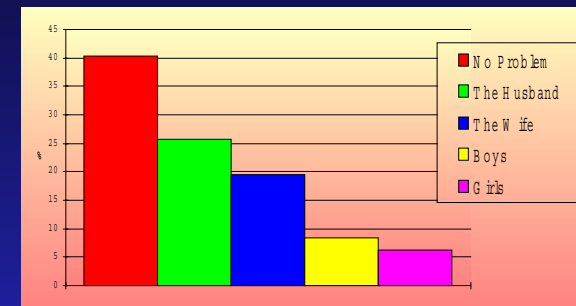
Where TV is Watched

	Total	Male	Female
N=	983	478	505
	%	%	%
Sitting Room	44.9	45.8	44.0
Dining Room	4.8	4.4	5.1
Kitchen	22.8	20.7	24.8
Bedroom	26.6	27.8	25.3
Another Place	1.0	1.3	0.8

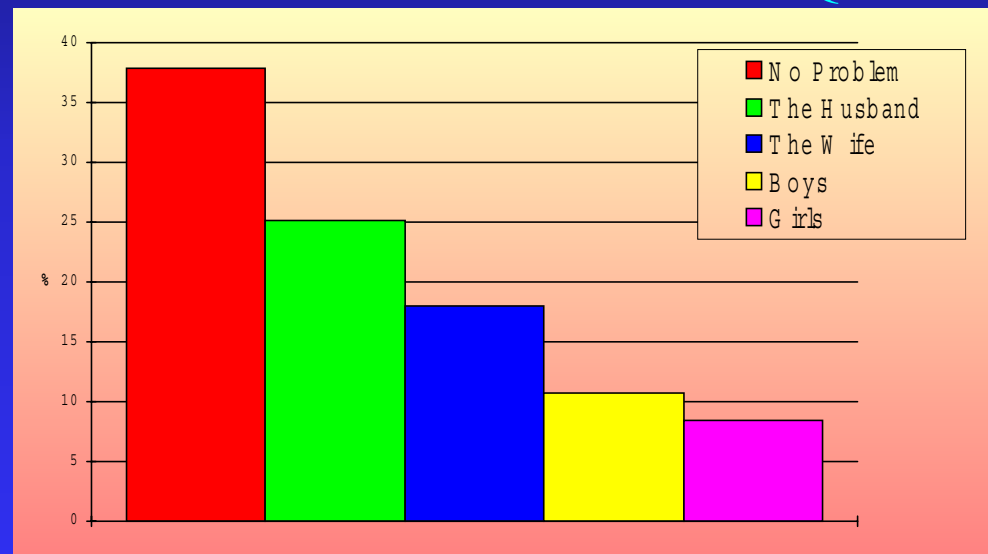
Who decides on Choice of Channel (1999 - 2001)



1st Quarter 2000



Last Quarter 2000



1st Quarter 2001

Cable TV Facilities

Base= All

		Total	AB	C1	C2	DE
	N=	1001	161	334	204	302
		%	%	%	%	%
	Connected	66.4	78.9	69.5	58.3	61.9
	Reception	30.5	21.1	27.5	35.3	35.4
	Basic	20.7	21.1	25.7	16.7	17.5
	TV Plus	15.3	36.6	16.2	6.4	8.9
	<i>Movie Channel</i>	<i>12.9</i>	<i>20.5</i>	<i>15.1</i>	<i>10.1</i>	<i>7.0</i>
	<i>Sports Channel</i>	<i>16.8</i>	<i>29.1</i>	<i>18.1</i>	<i>12.6</i>	<i>9.6</i>

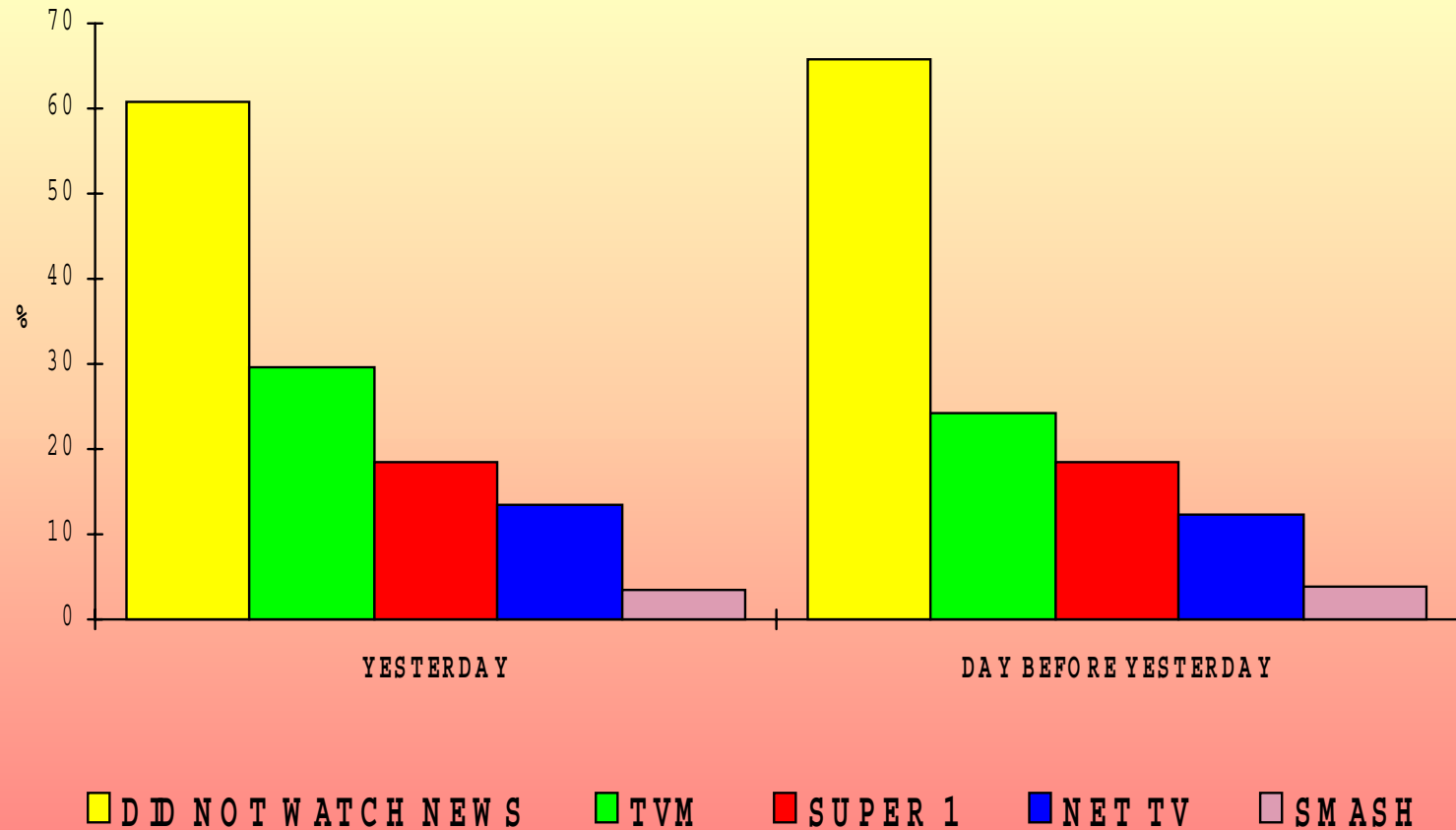
Preferred Source for Local News

	Total	Male	Female
N=	1001	489	512
	%	%	%
No Preference	1.1	1.0	1.2
Radio	10.5	10.2	10.7
TV	78.5	77.1	79.9
Newspaper	6.9	9.2	4.7
From Other Persons	3.0	2.5	3.5

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	489	512
	%	%	%
No Preference	1.2	1.0	1.4
Radio	8.8	8.4	9.2
TV	81.7	81.4	82.0
Newspaper	5.4	7.4	3.5
From Other Persons	2.9	1.8	3.9

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



General Preference for Programme Sectors (Radio: 1999 – 2001)

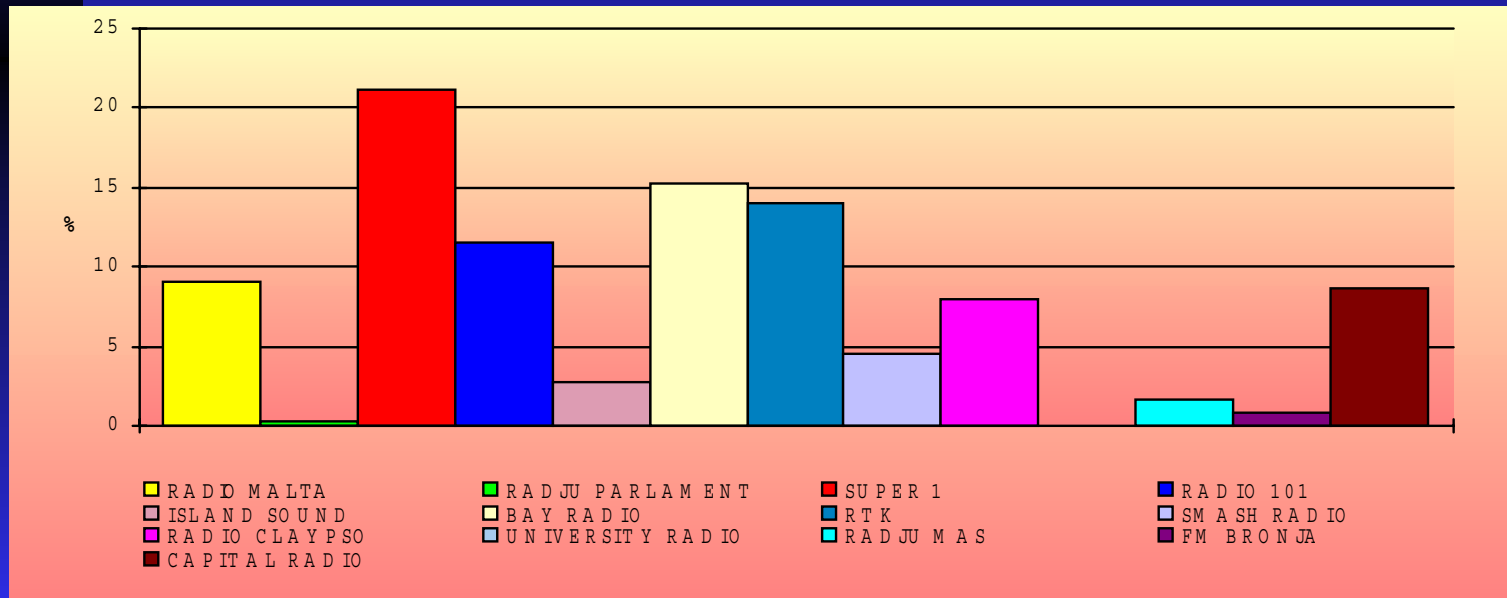
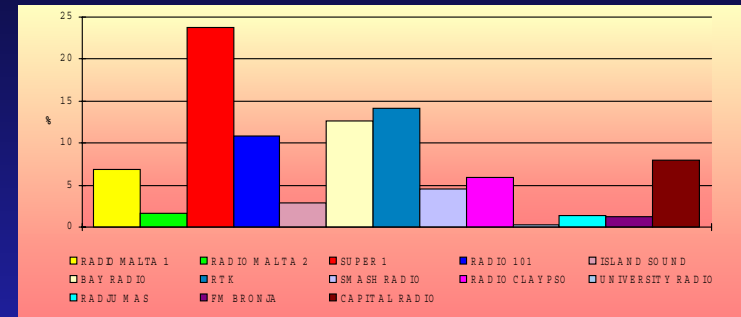
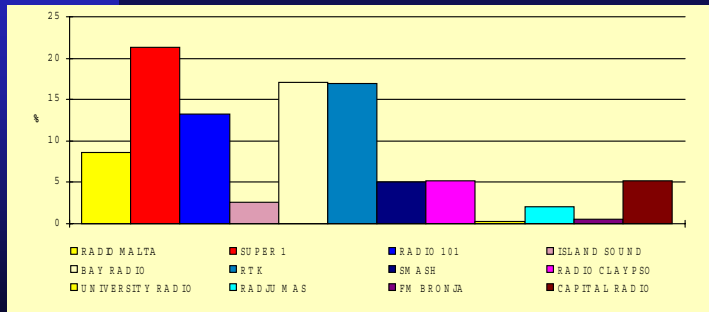
Programme Segments	1999 1 st Qu.	2000 1 st Qu	2001 1 st Qu
Music	87.4	86.5	87.0
Local News	80.5	76.6	77.7
Foreign News	76.9	74.6	74.2
Discussions on Personal Problems	59.7	57.7	57.4
Current Affairs	54.3	57.3	52.5
Health/Beauty/Home/Law	51.0	46.6	46.2
Religion	47.1	47.1	44.7
Culture	44.4	37.8	38.9
Sports	37.2	36.8	38.3
Novels/Plays	40.7	35.7	33.8
Women	NA	21.6	32.6
Money/Business	25.2	23.4	25.8
Children	25.8	20.1	19.6

General Preference for Programme Sectors

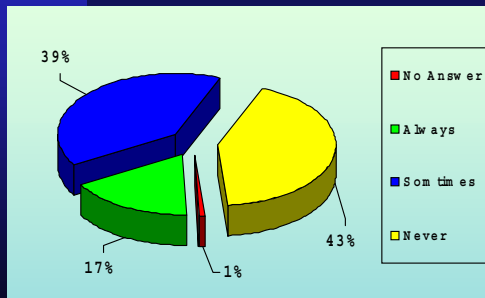
(TV: 1999 – 2001 – 1st Quarter)

Programme Segments	1999	2000	2001
Foreign News	90.7	90.2	91.8
Local News	93.1	90.6	91.0
Feature Films	77.9	80.9	78.3
Weather	76.4	70.0	75.5
Discussions	73.8	71.5	71.7
Quizzes / Game Shows / Variety Programmes	66.8	60.4	67.8
Documentaries	73.5	66.6	65.2
Sports	62.7	60.7	64.3
Plays	46.0	54.8	62.6
Serials/Soap Operas	66.7	53.0	56.4
Current Affairs	53.0	45.5	43.8
Religion	48.8	42.1	40.4
Music Video-Clips	44.1	40.8	42.4
Art & Culture	44.7	38.2	39.5
Women's Programmes	43.4	36.3	37.6
Children's Programmes	43.5	31.1	33.1
Business & Finance	23.7	27.0	26.2

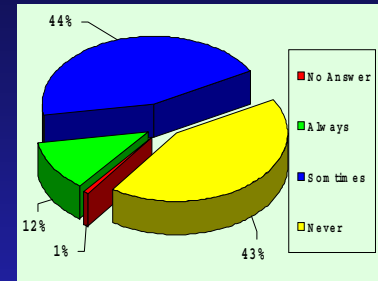
Overall Performance as 'Best' Radio Station



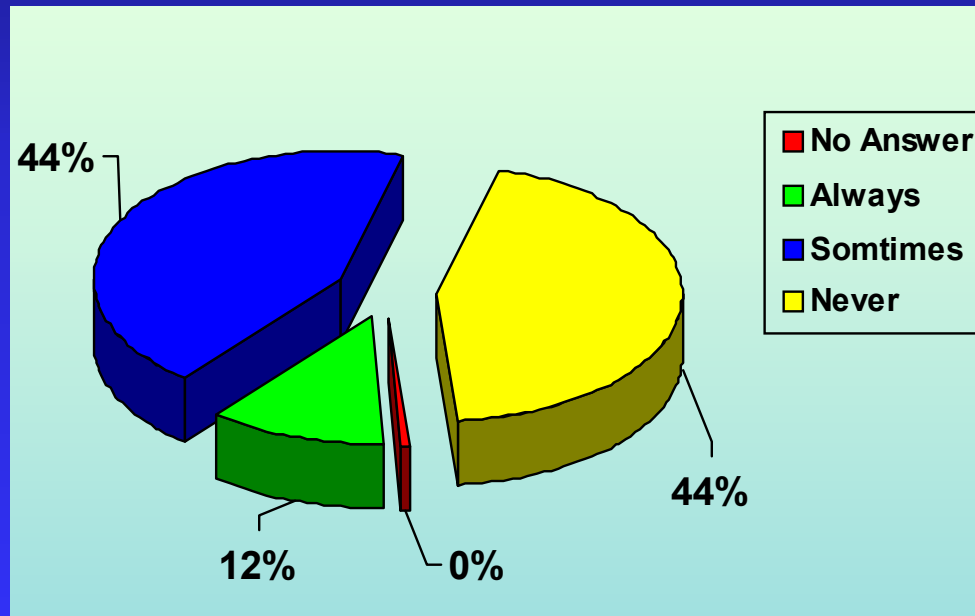
Interest in Political Broadcasts (1999 – 2001)



2000

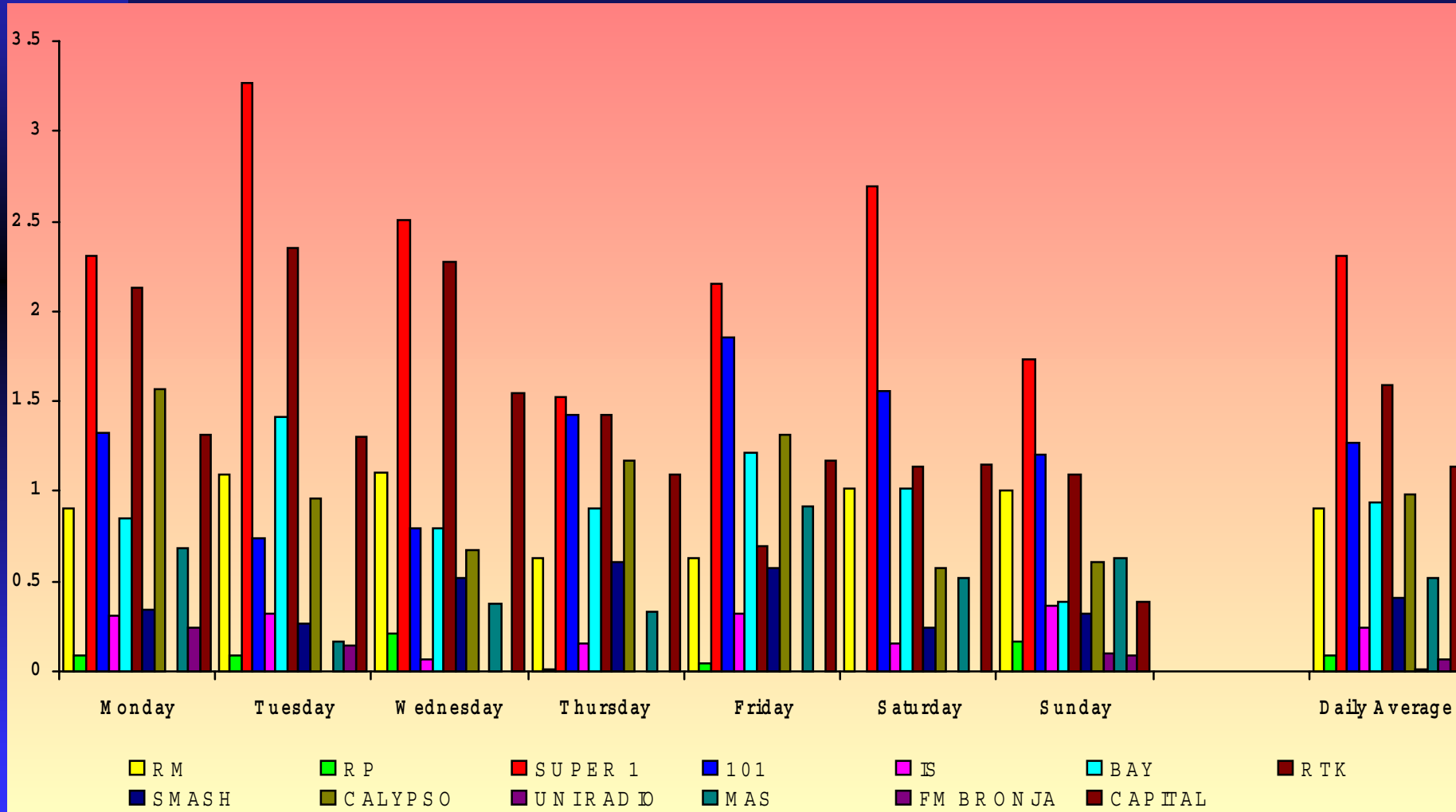


1st Quarter
2001

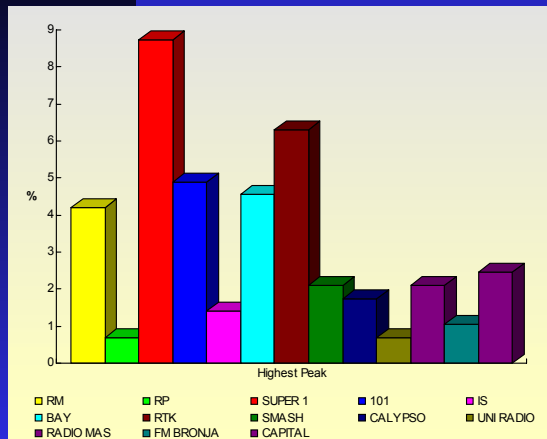
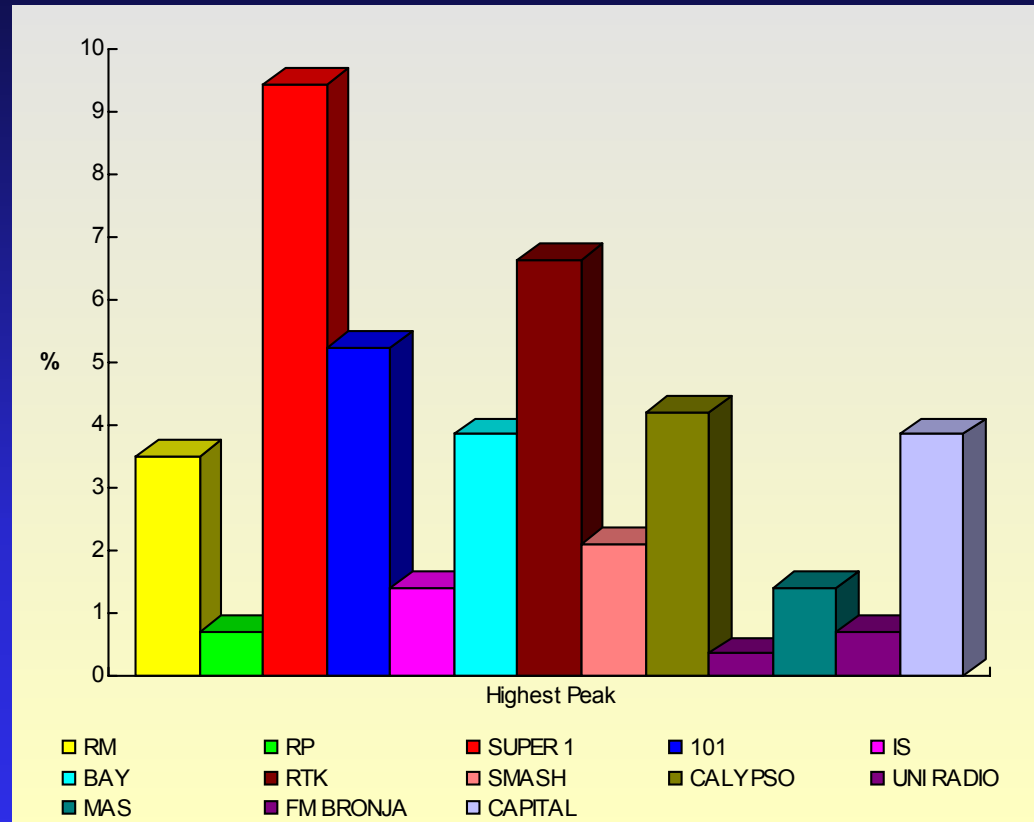
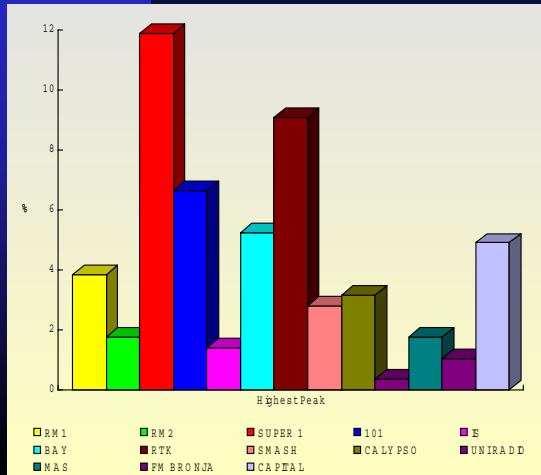


Daily Radio Average Audience Share

(Basis: Total No. of Transmission Hours)

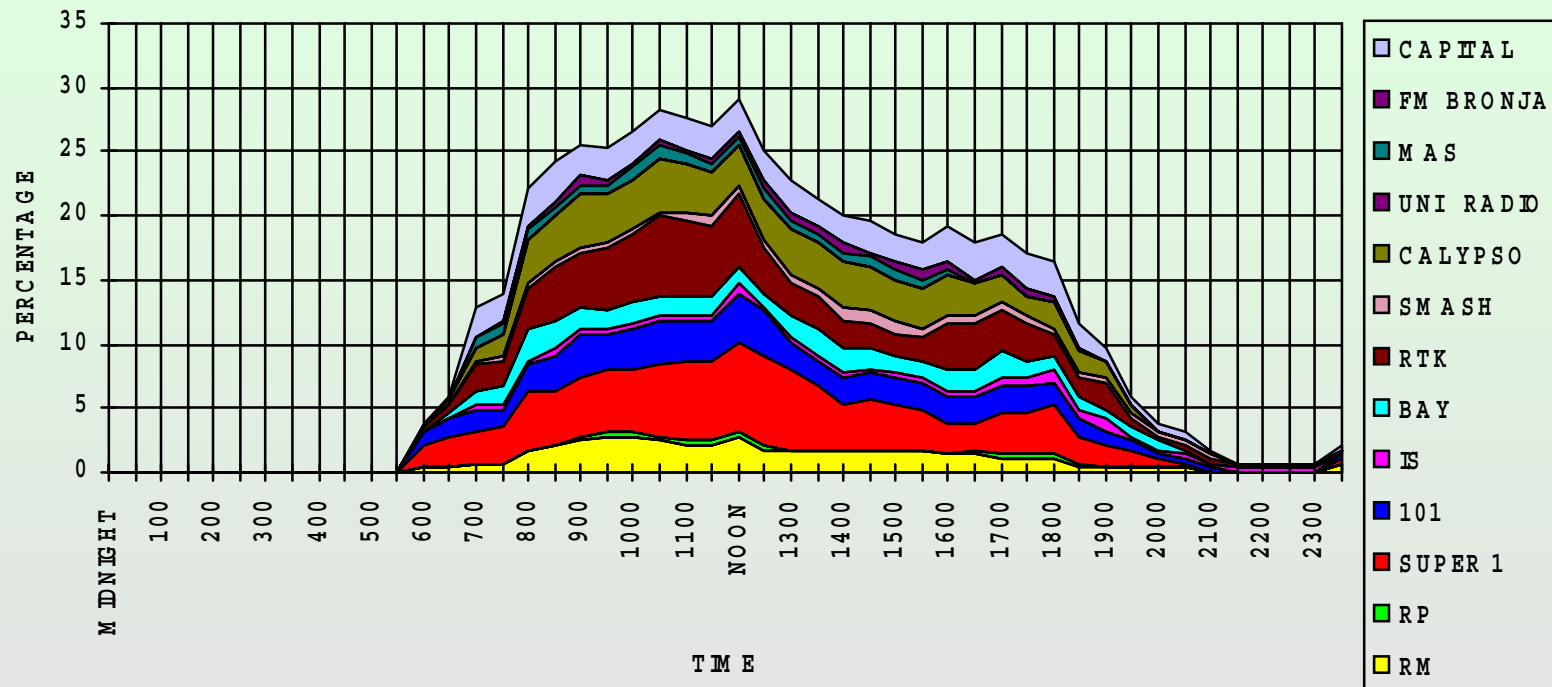


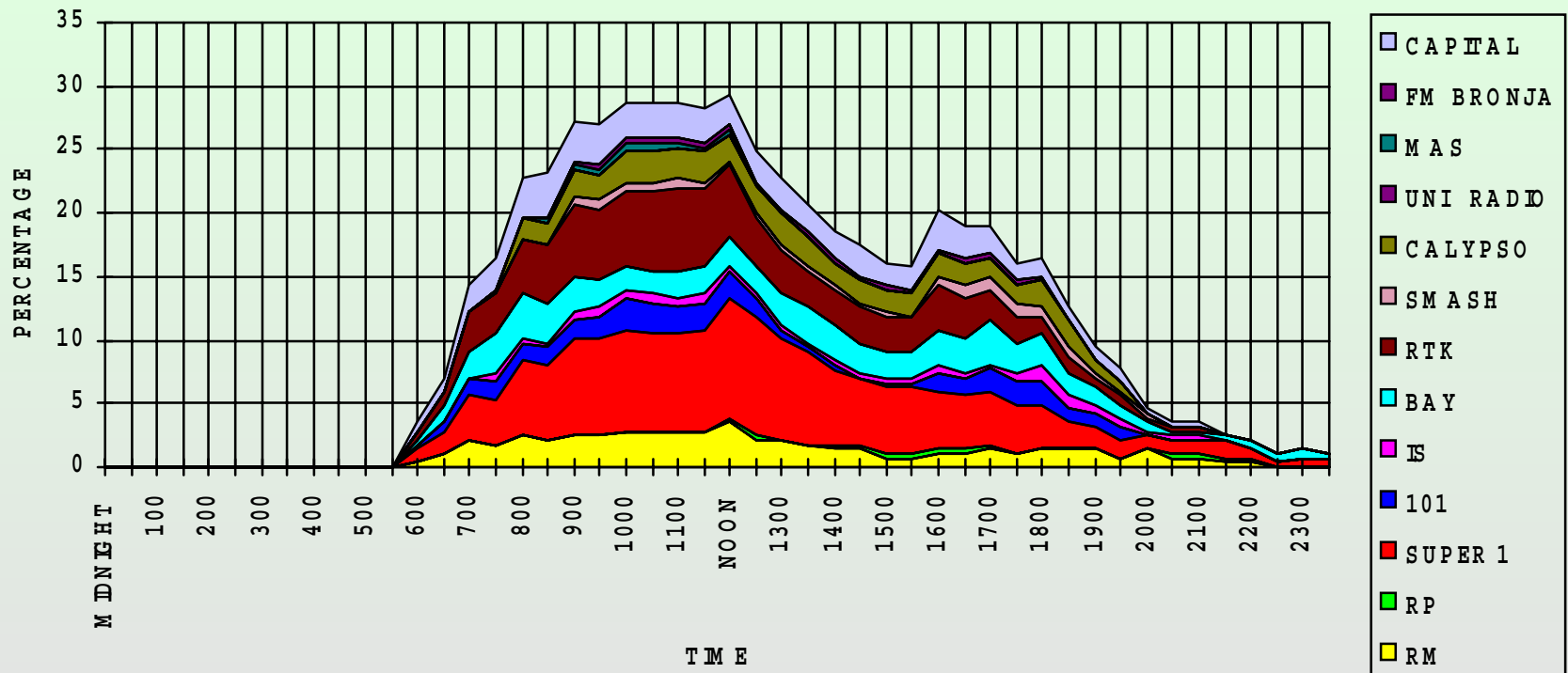
Highest Radio Station Peak Audience Share

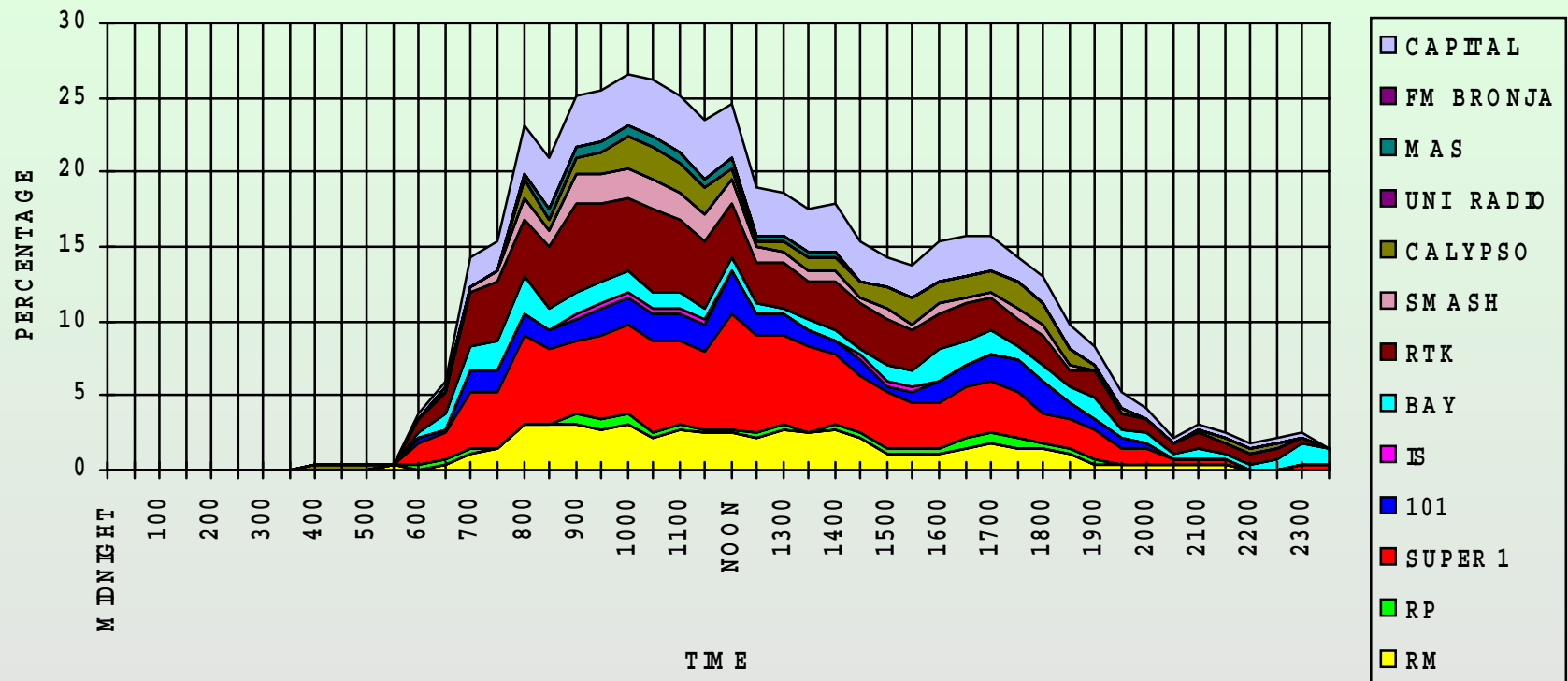


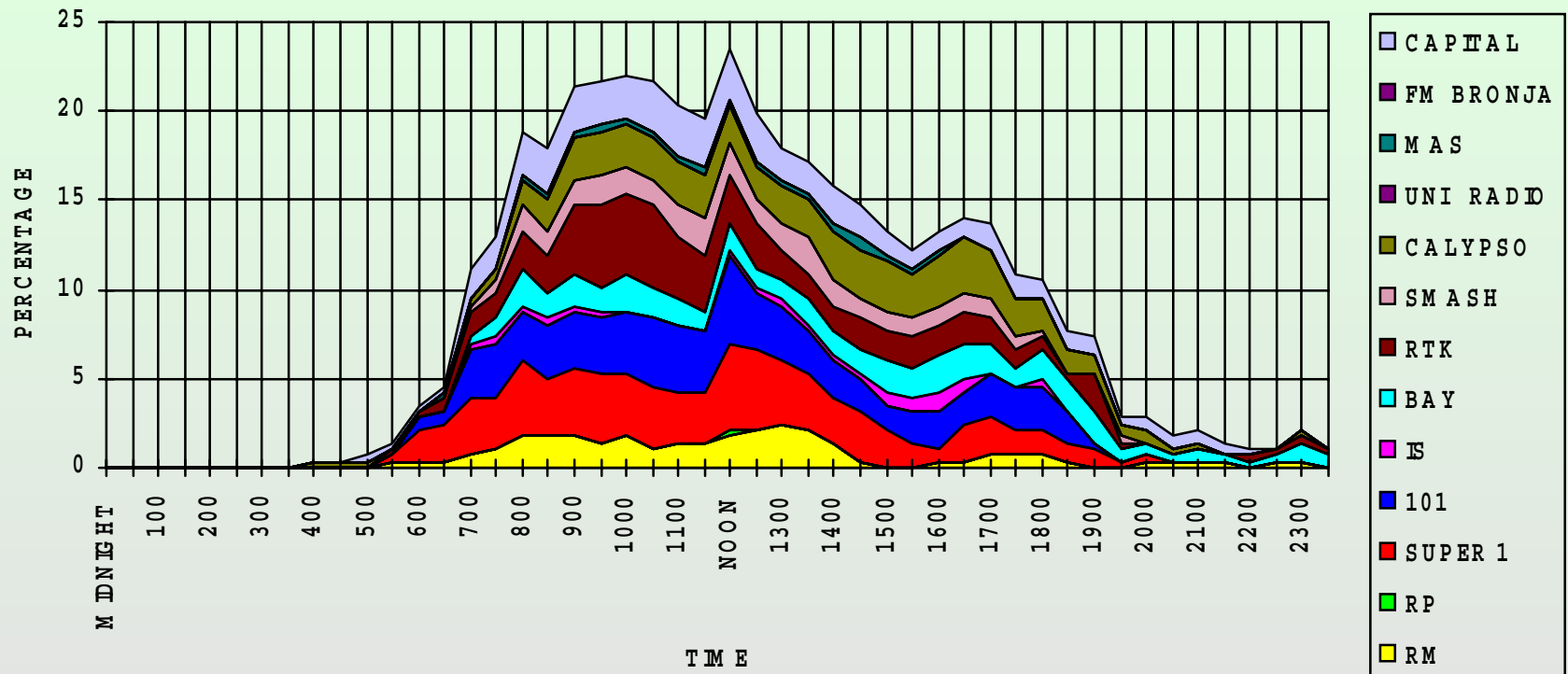
2000

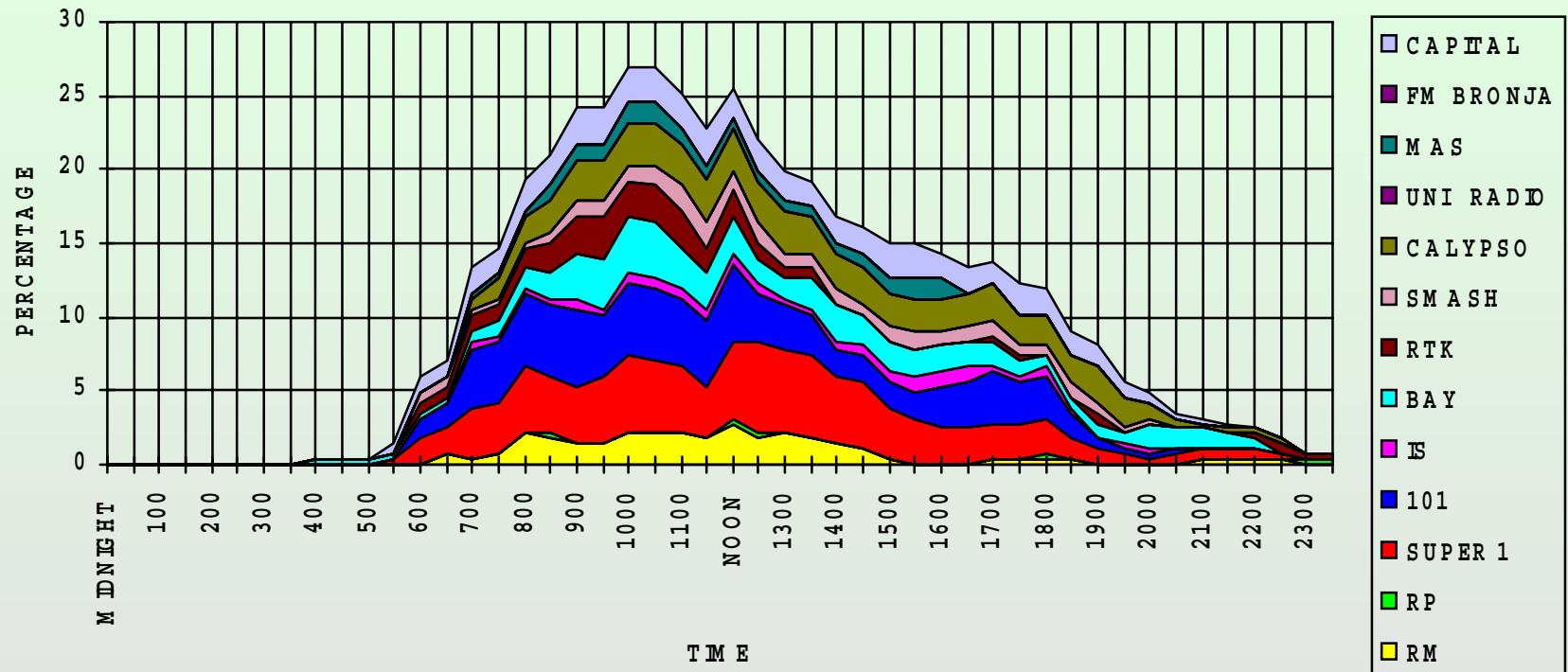
1st Quarter 2001

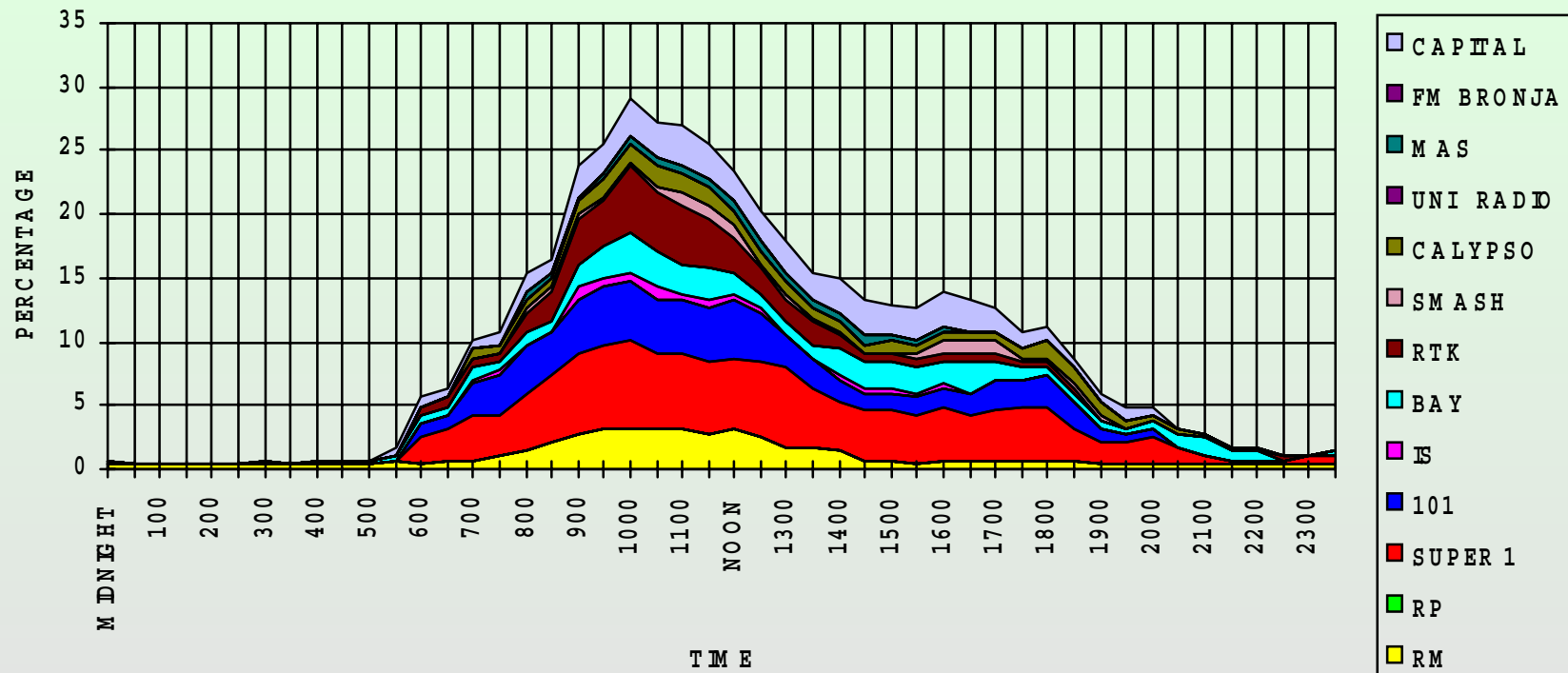


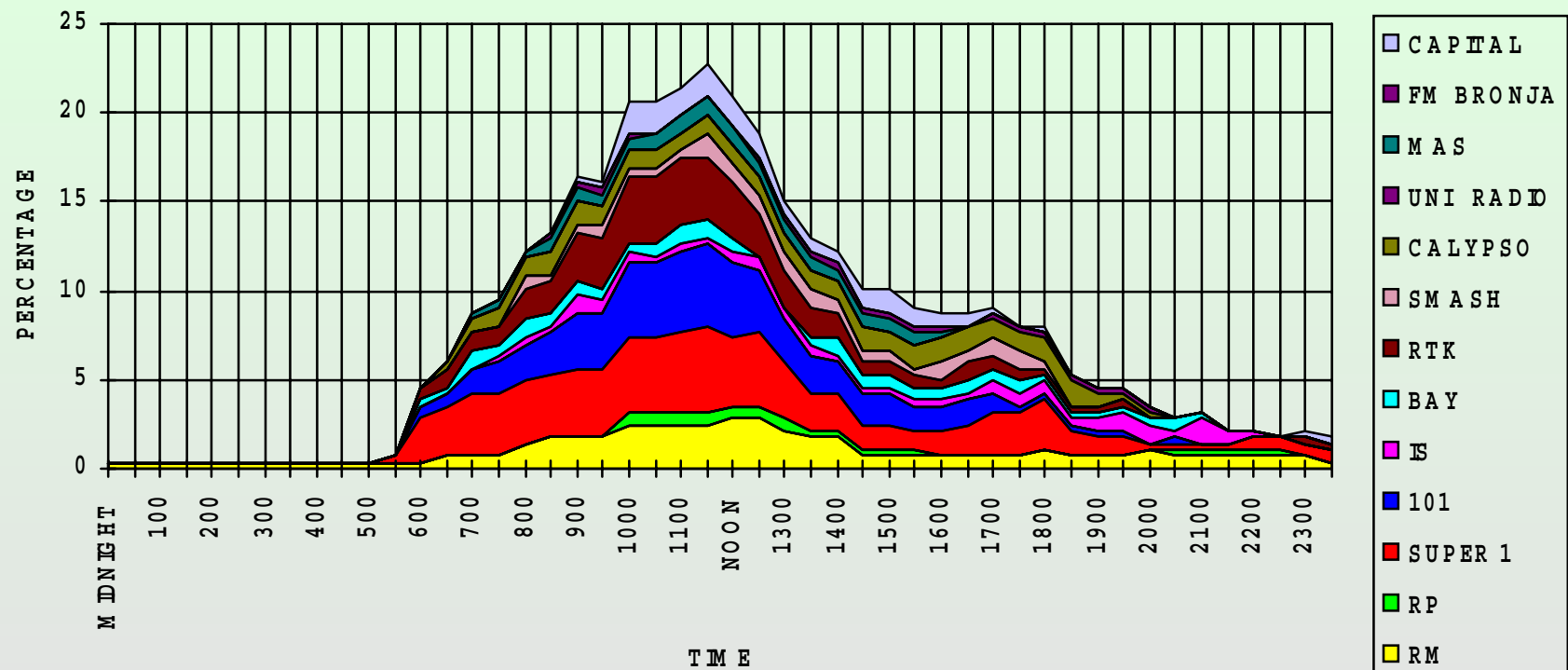












Meaning of %

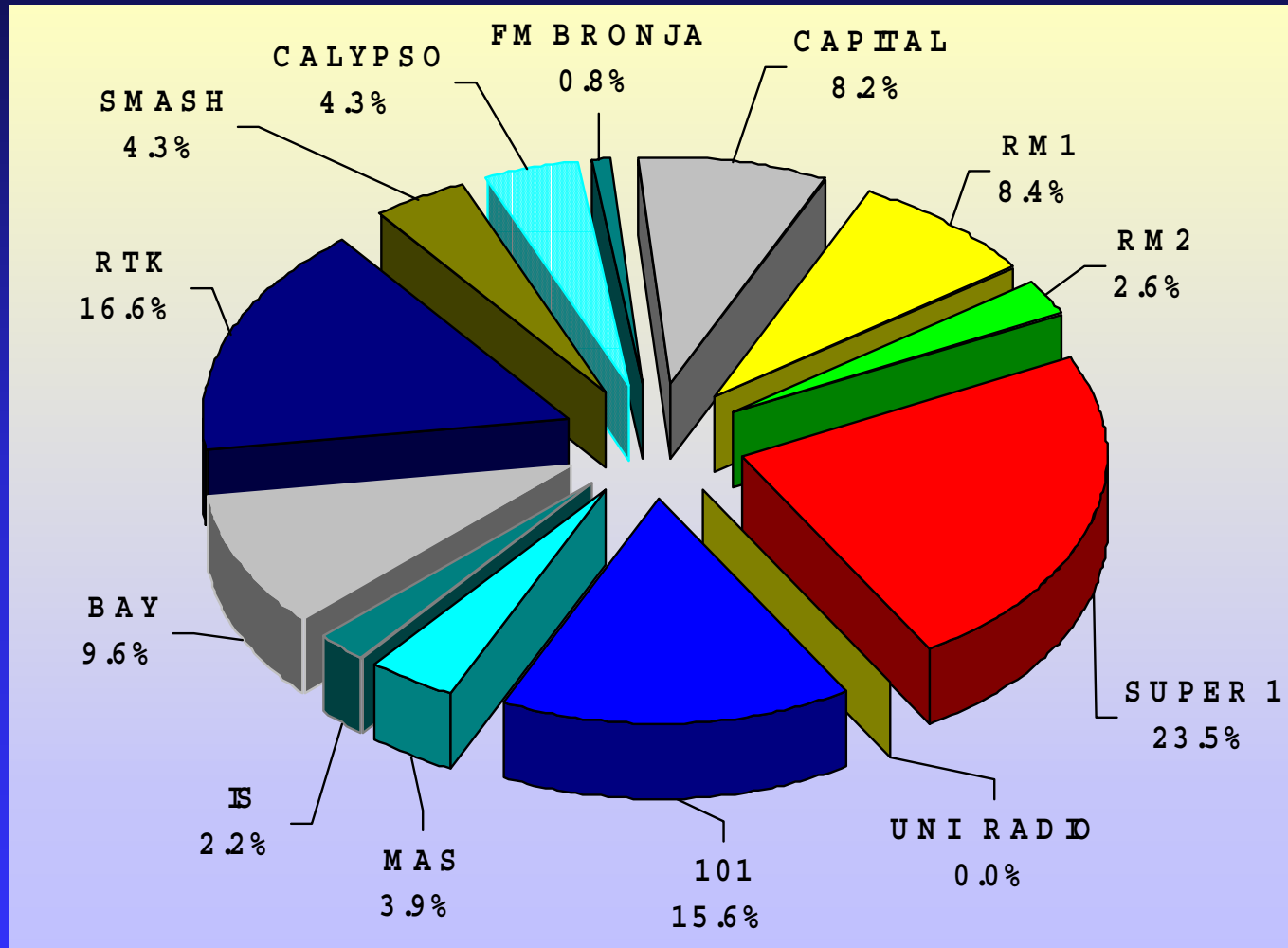
- ❑ The meaning of 1% in the following pie chart refers to the average share of audience for each time-slot if each time-slot were to be 'full to capacity'. They vary for EVERY STUDY.
- ❑ Autumn 2001
 - ❖ Radio:
 - All Available Slots: 1% = 311 persons
 - 6.00 – Midnight: 1% = 412 persons
 - ❖ TV:
 - B1: 1% = 58 persons
 - B2: 1% = 245 persons
 - B3: 1% = 1169 persons

BA Audience Audit October 2001

Daily Average Radio Audience Levels:

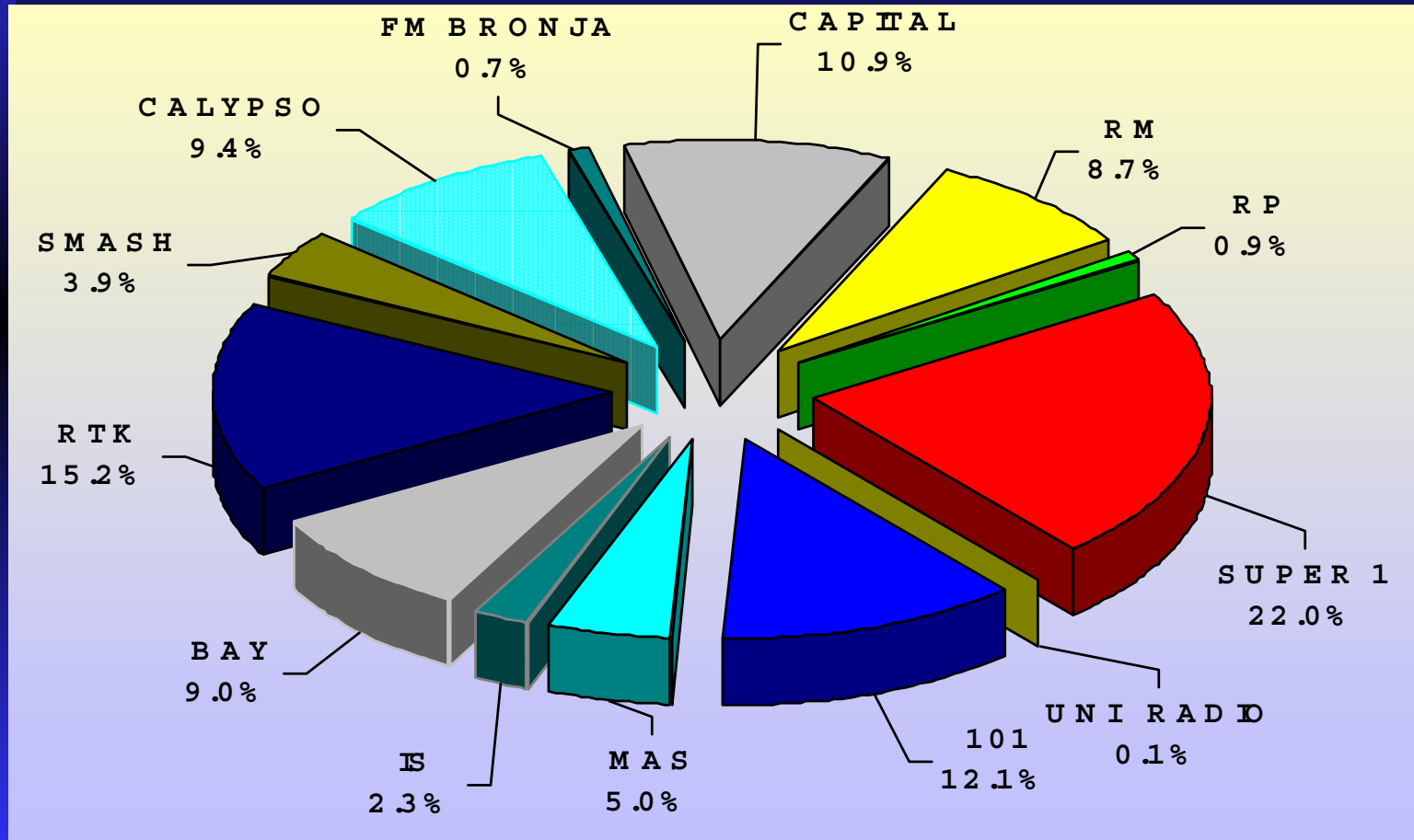
1st Quarter 2000

(Basis: 6.00 a.m - Midnight)

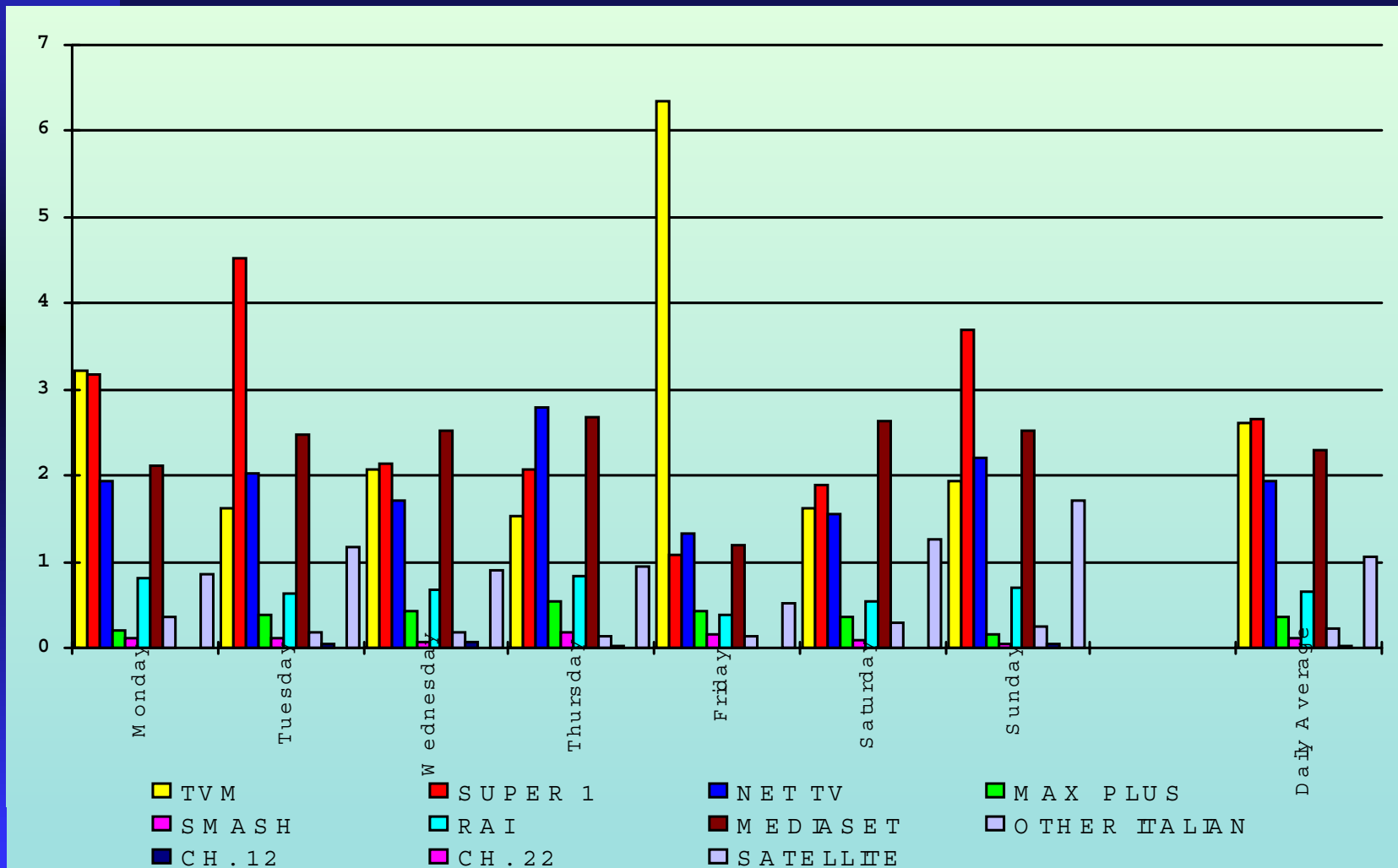


BA Audience Audit October 2001

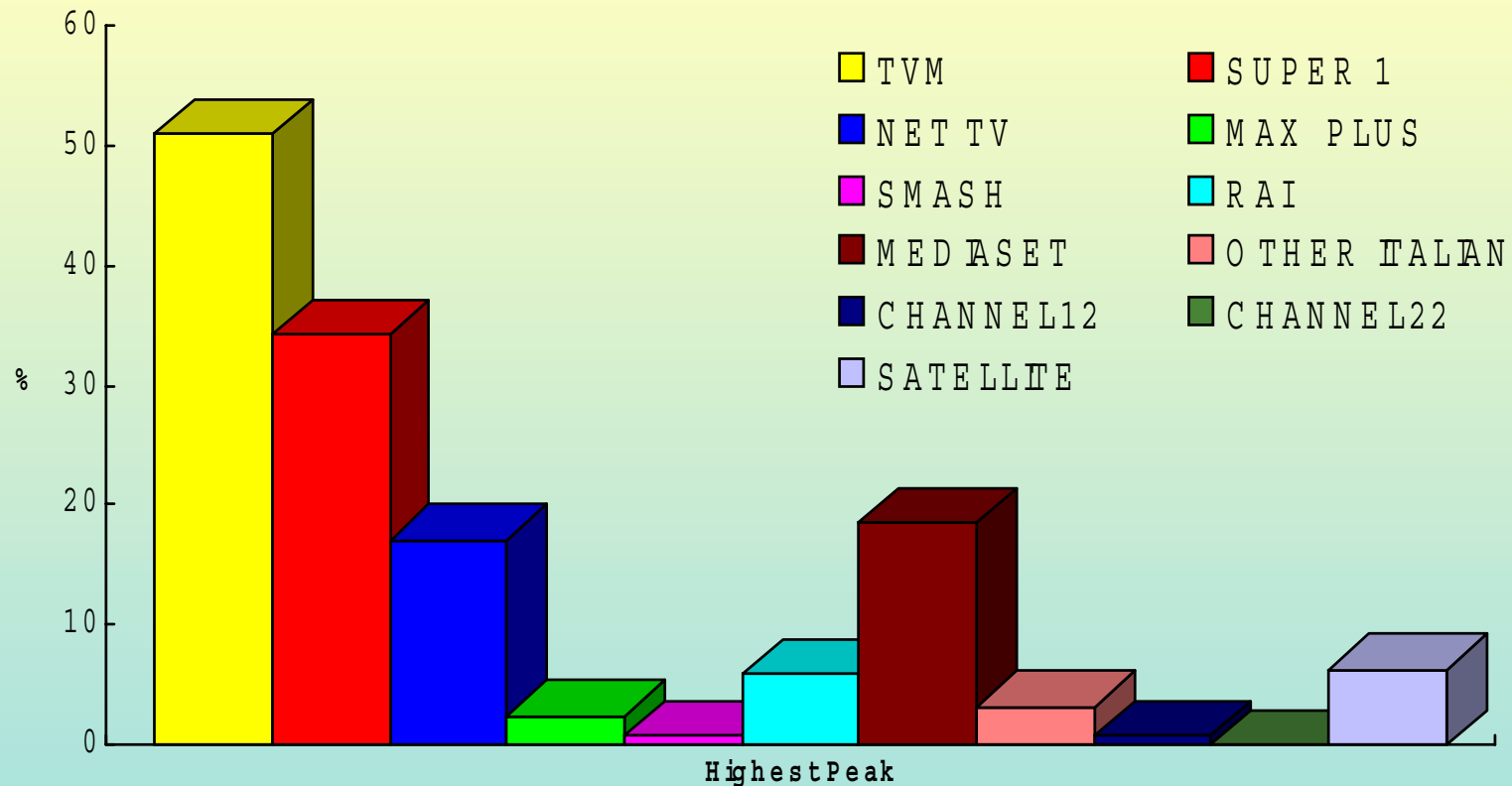
Daily Average Radio Audience Levels: 1st Quarter 2001 (Basis: 6.00 a.m - Midnight)



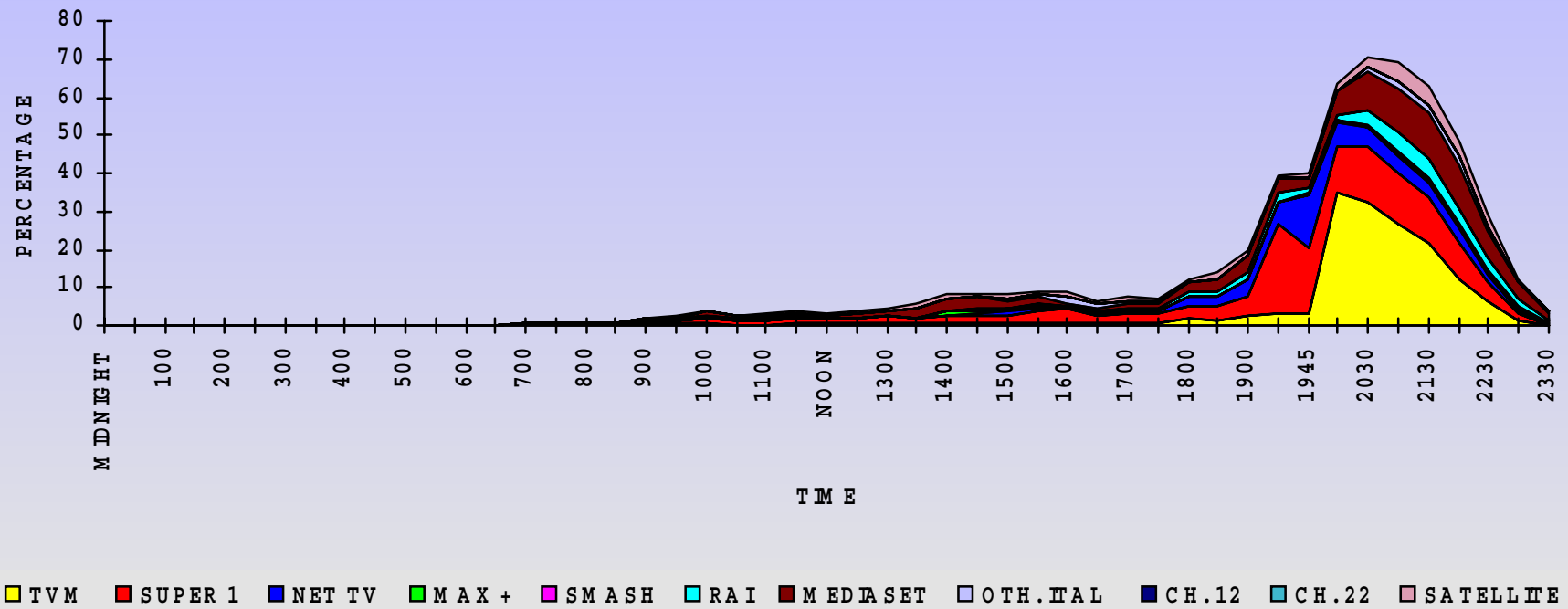
Daily TV Average Audience Share (Basis: Hours of Transmission by Station)



Highest TV Channel Peak Audience Share

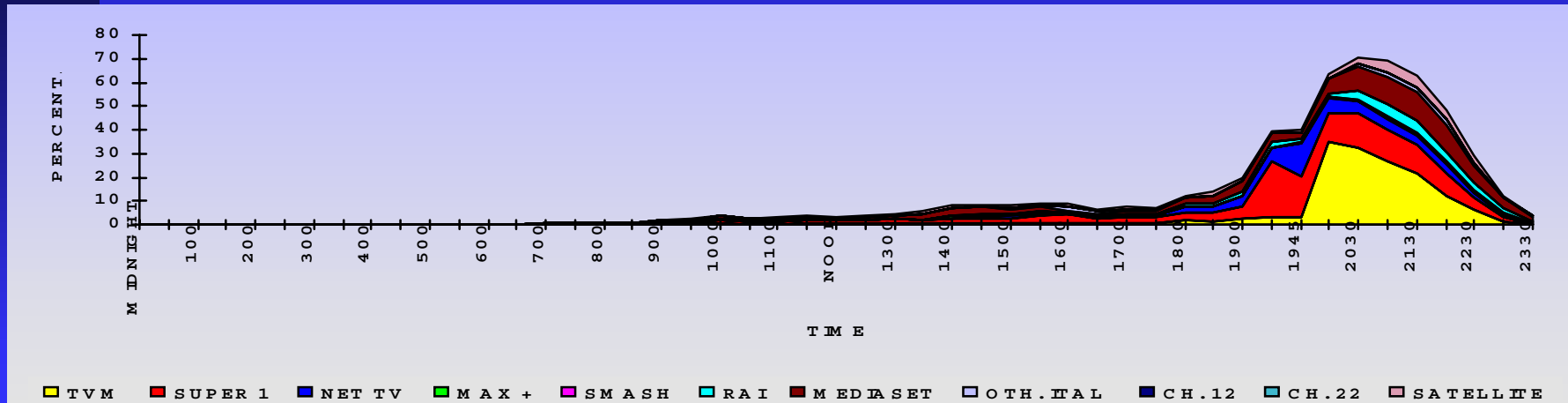
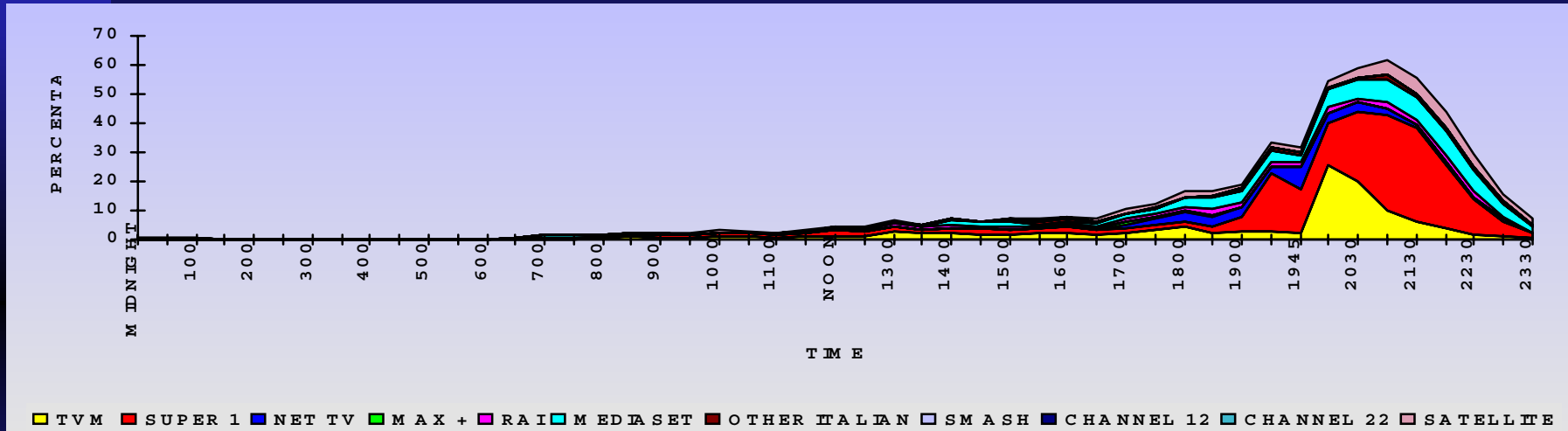


TV Viewing: Monday



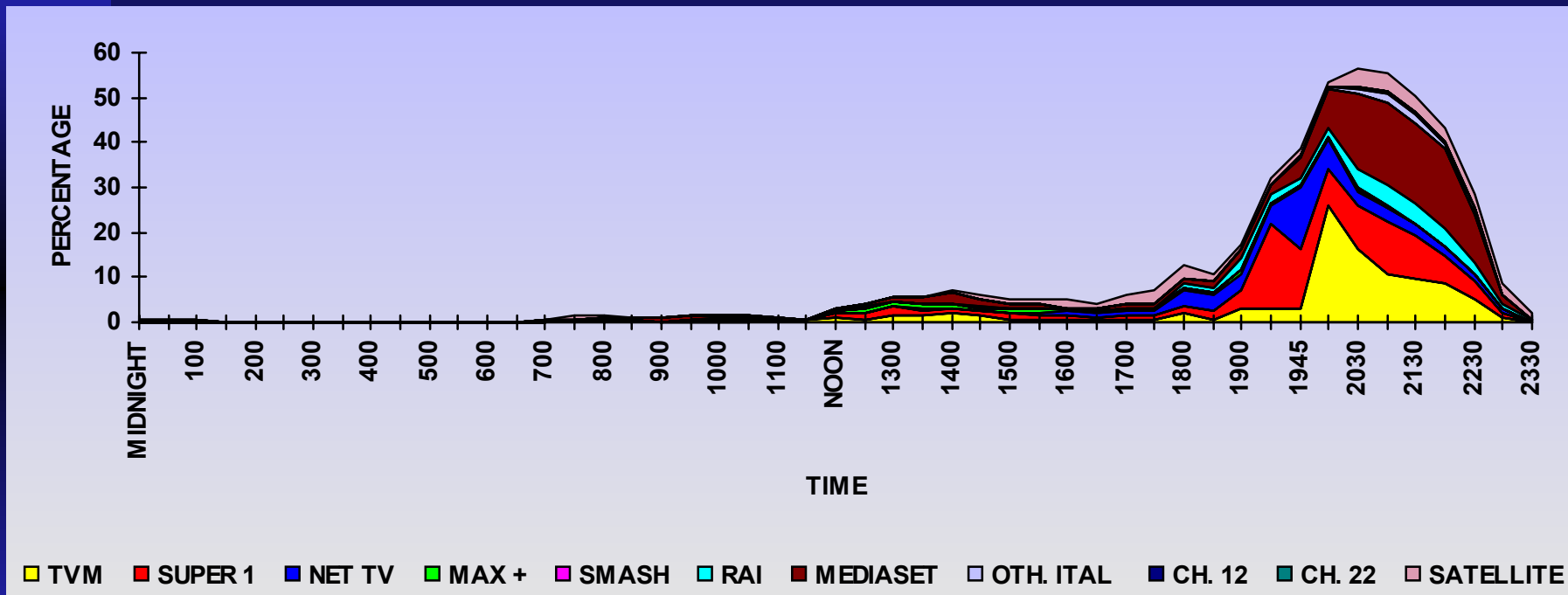
TV Viewing: Monday

1st Quarter 2000 – 2001

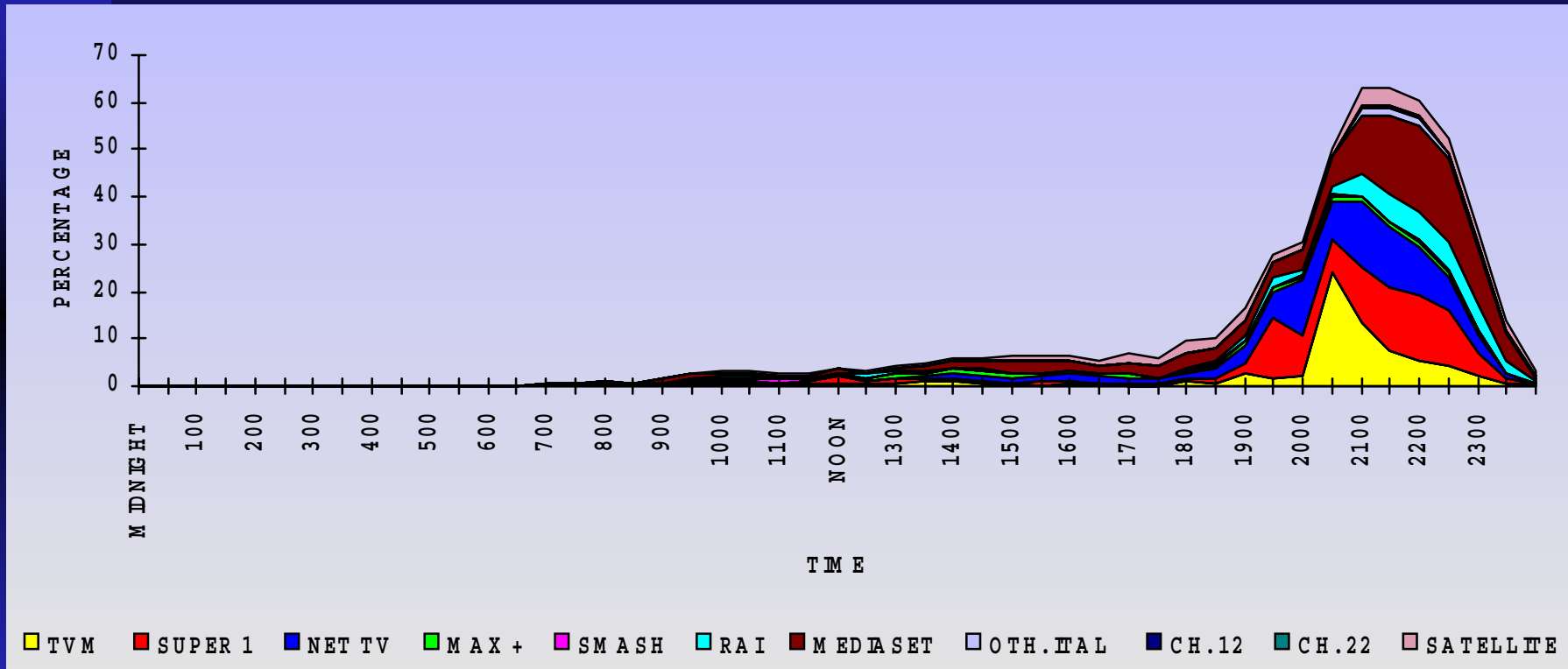




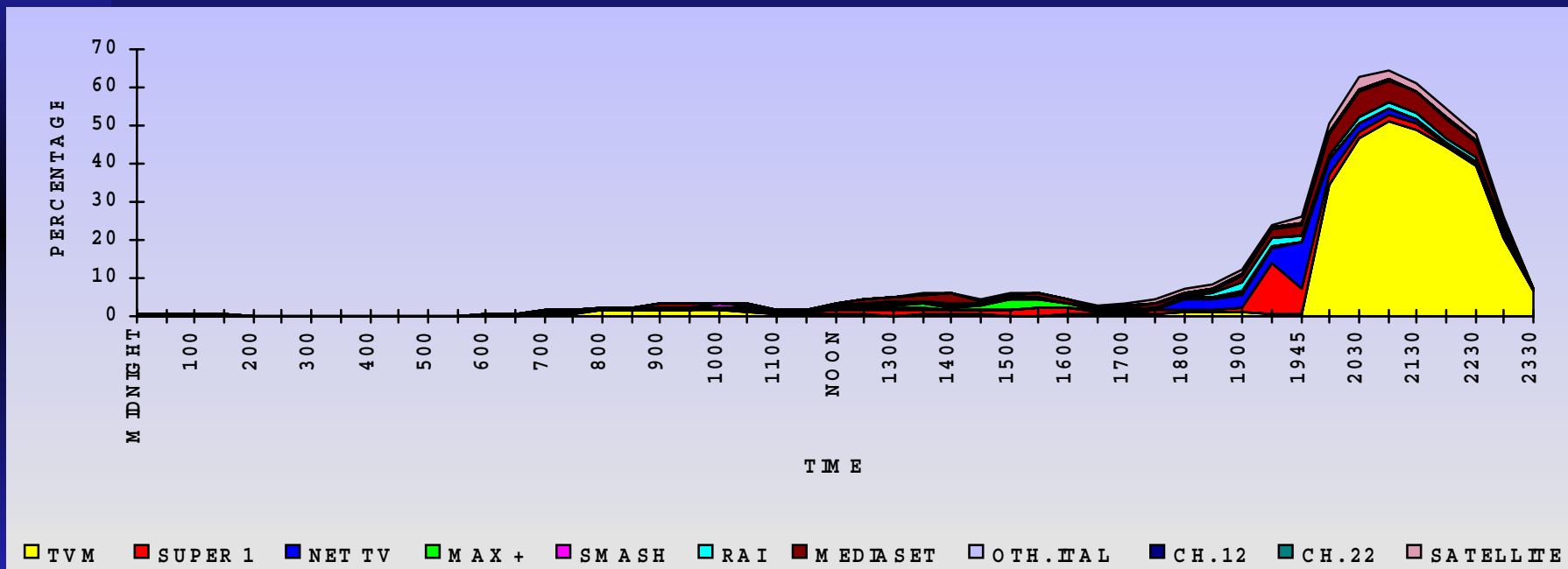
TV Viewing: Wednesday



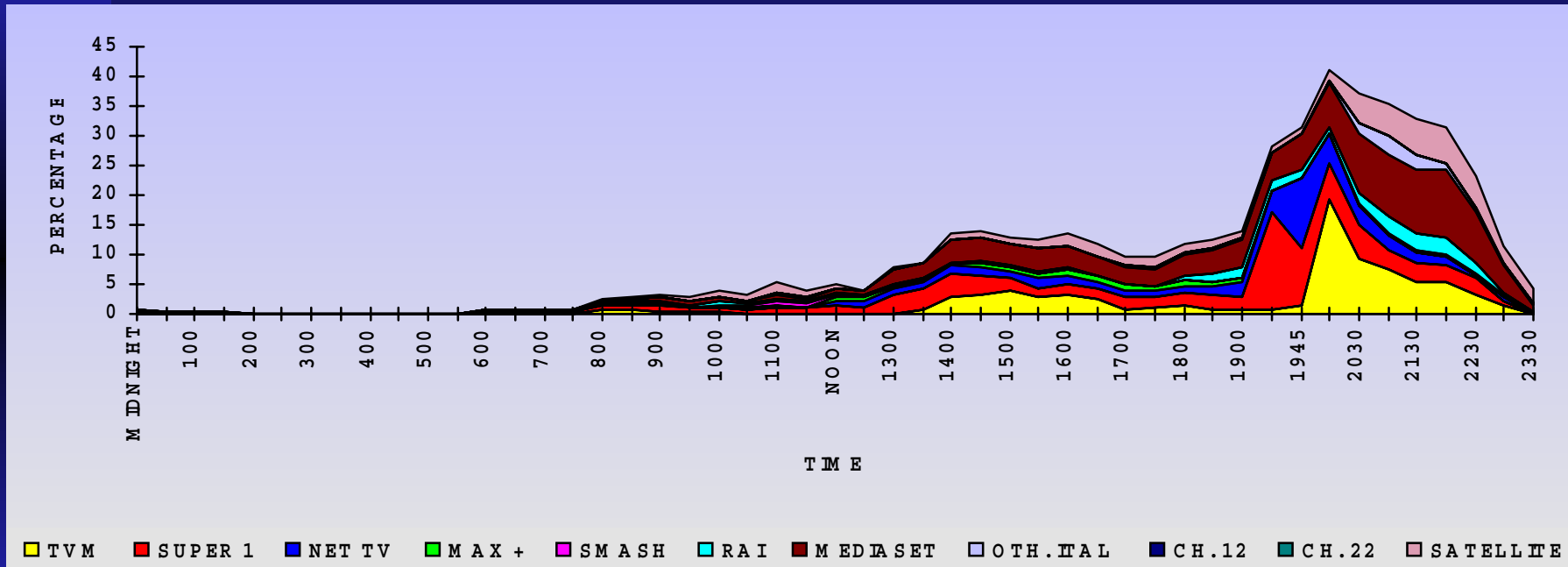
TV Viewing: Thursday



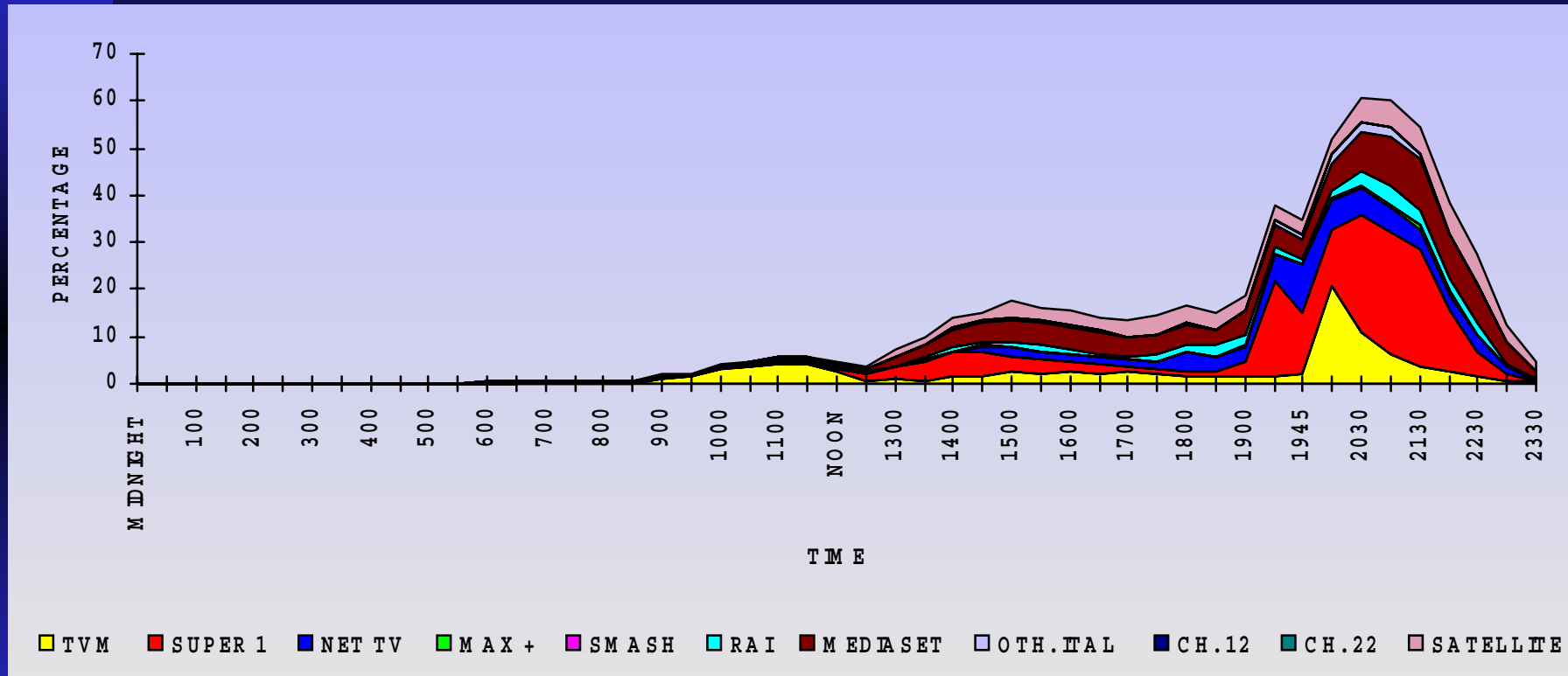
TV Viewing: Friday



TV Viewing: Saturday



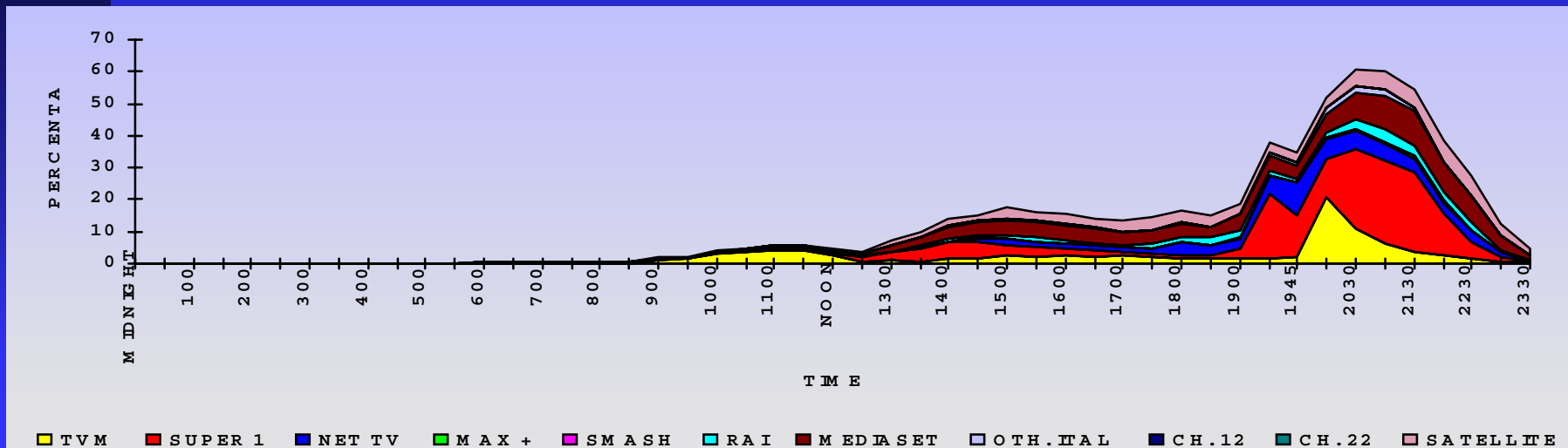
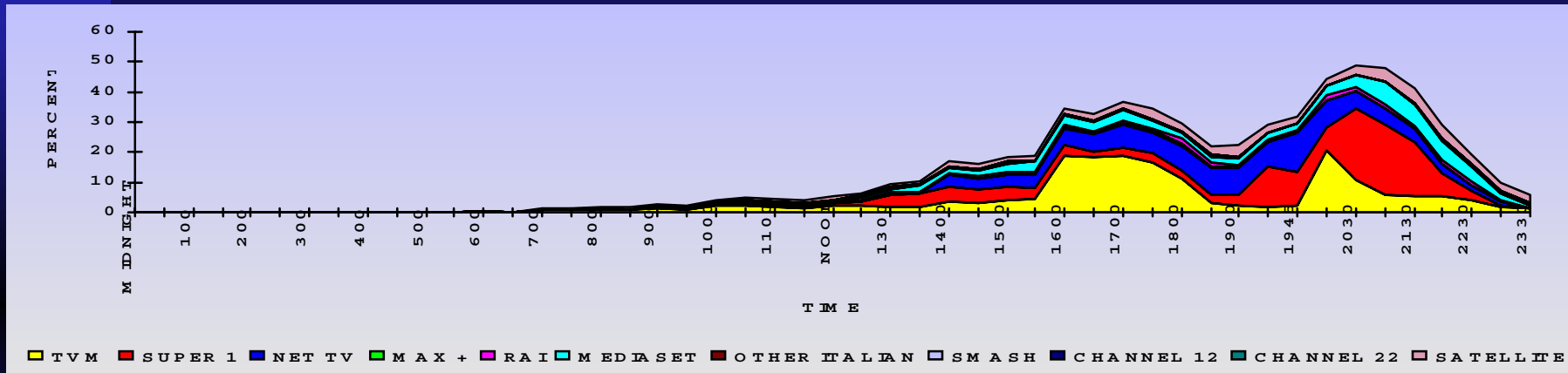
TV Viewing: Sunday



BA Audience Audit October 2001

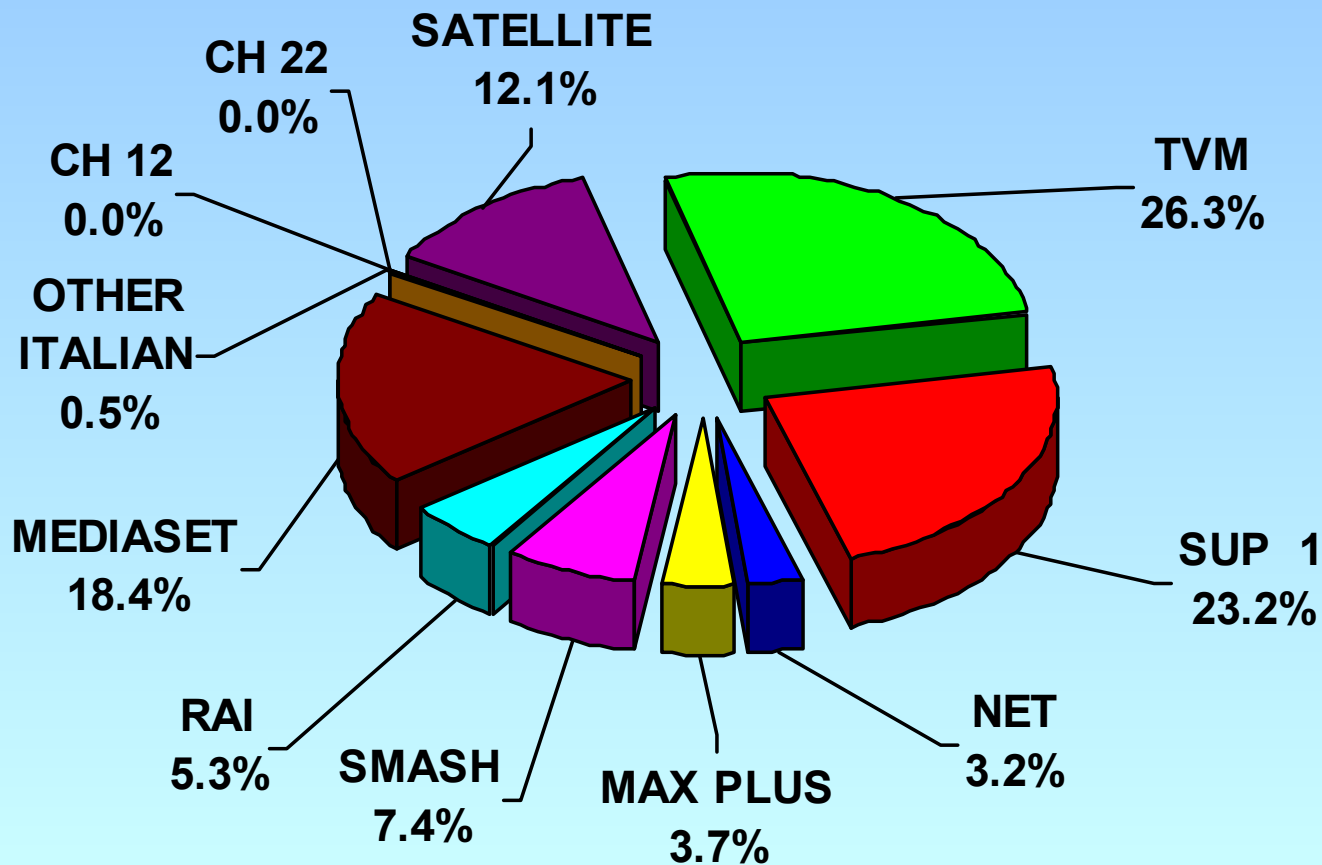
TV Viewing: Sunday

1st Quarter 2000 – 2001



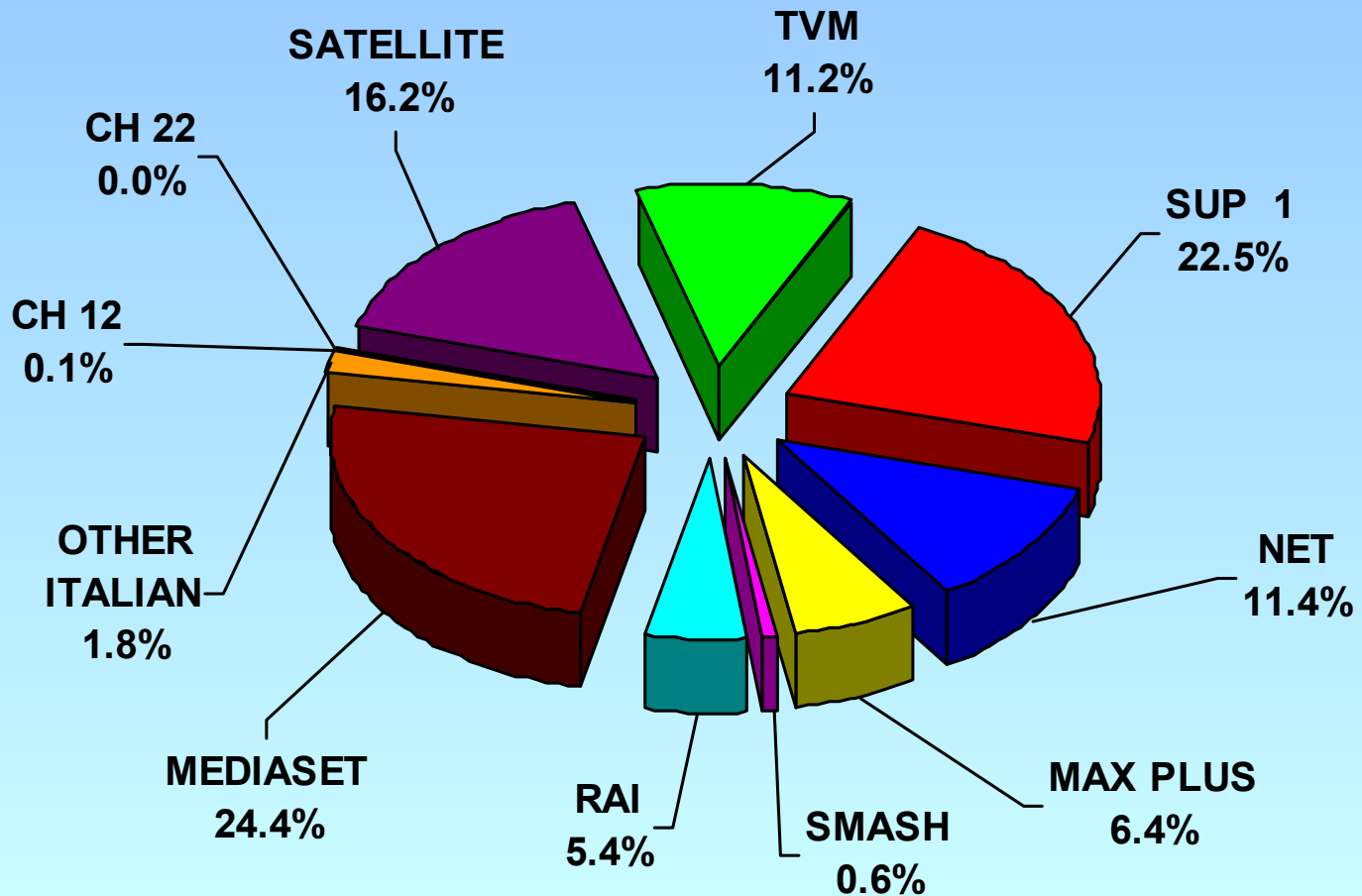
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



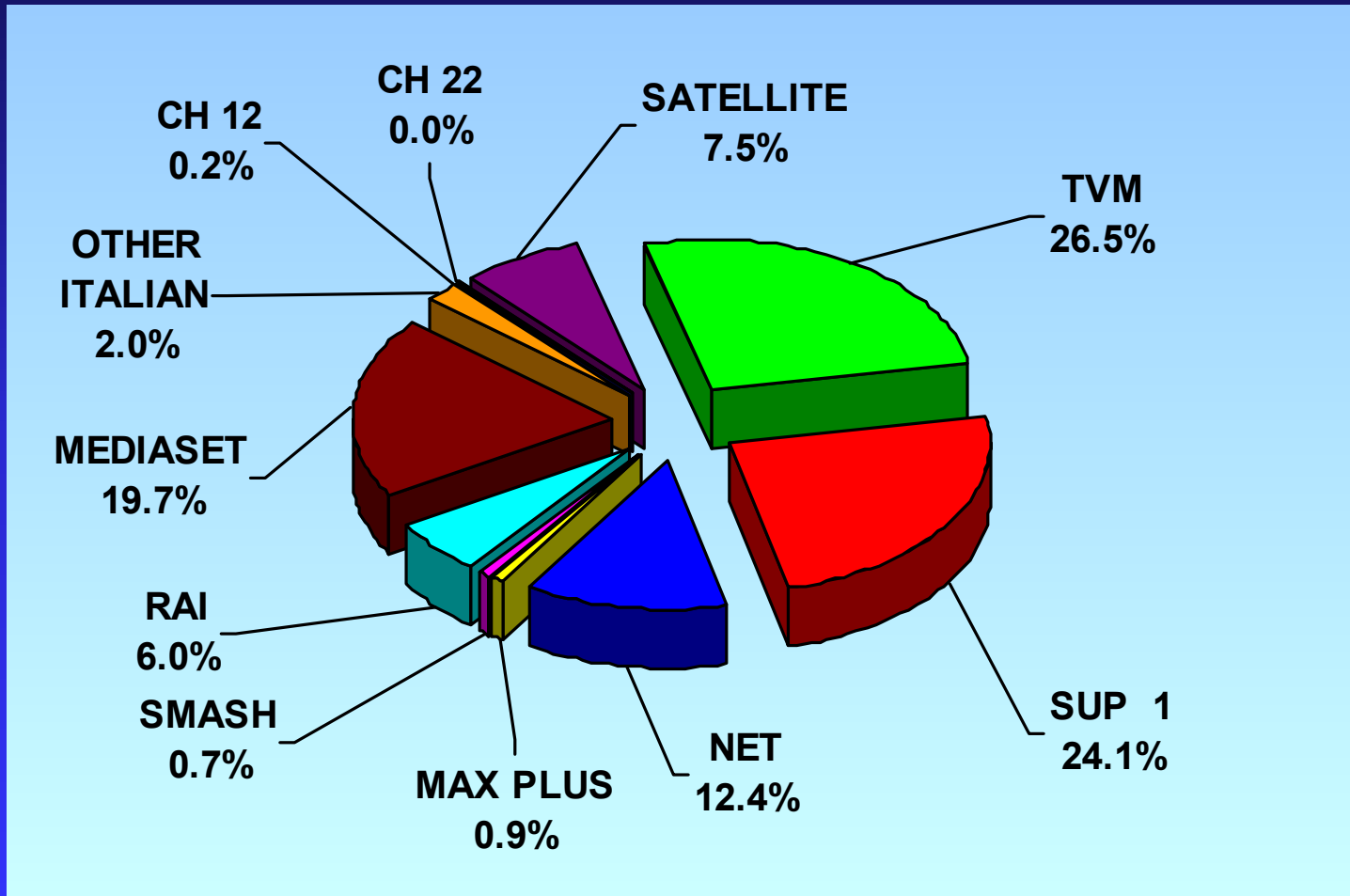
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



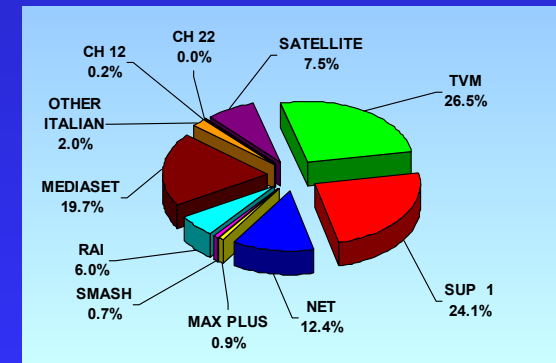
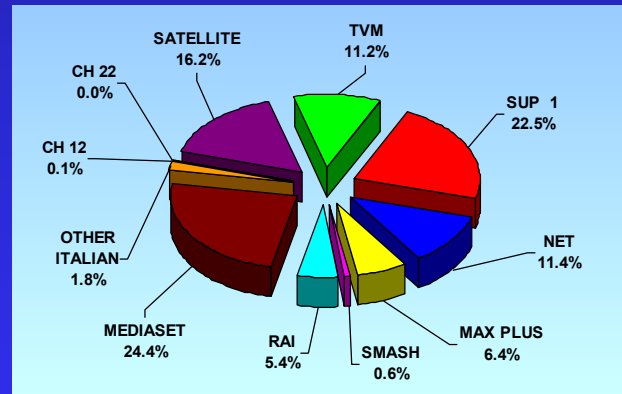
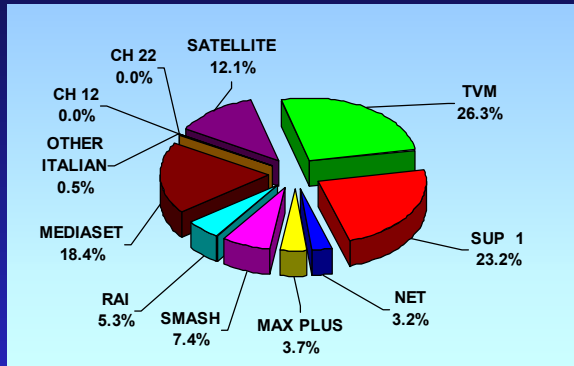
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



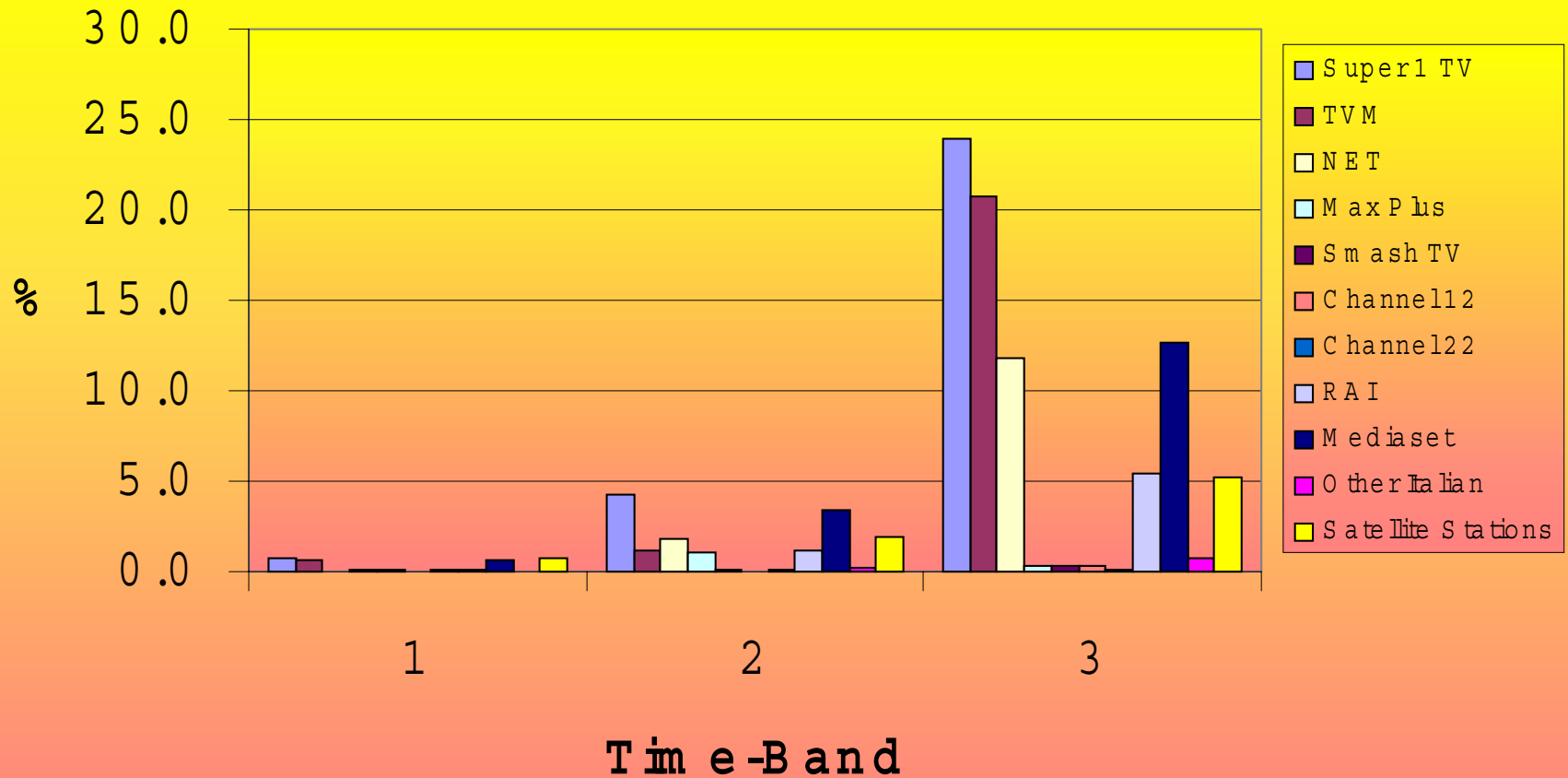
Daily Average TV Audience Levels

Time-Band Comparison



Daily Average TV Audience Levels

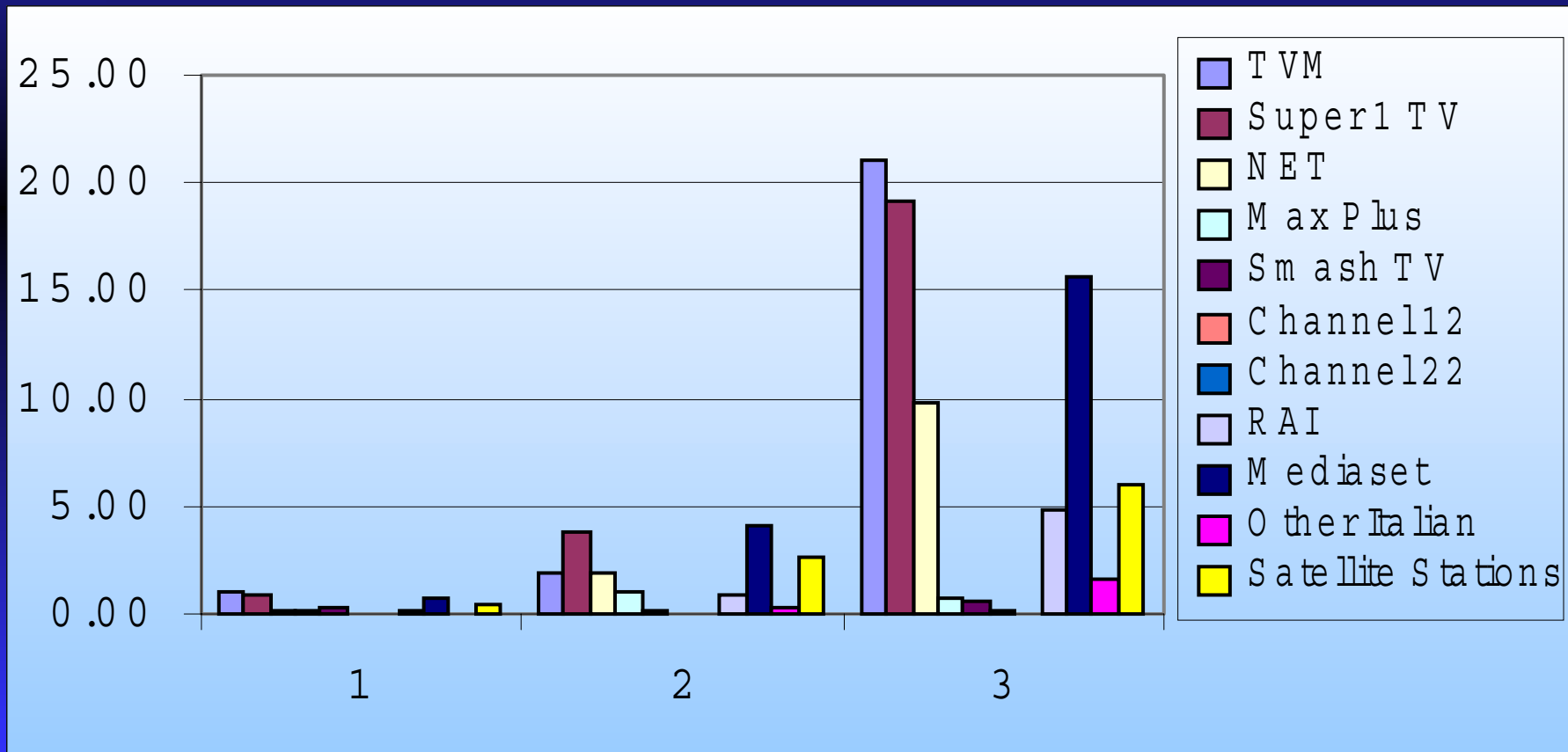
*Time-Band Comparison in terms of Absolute Audience Size
Autumn 2000*



Daily Average TV Audience Levels

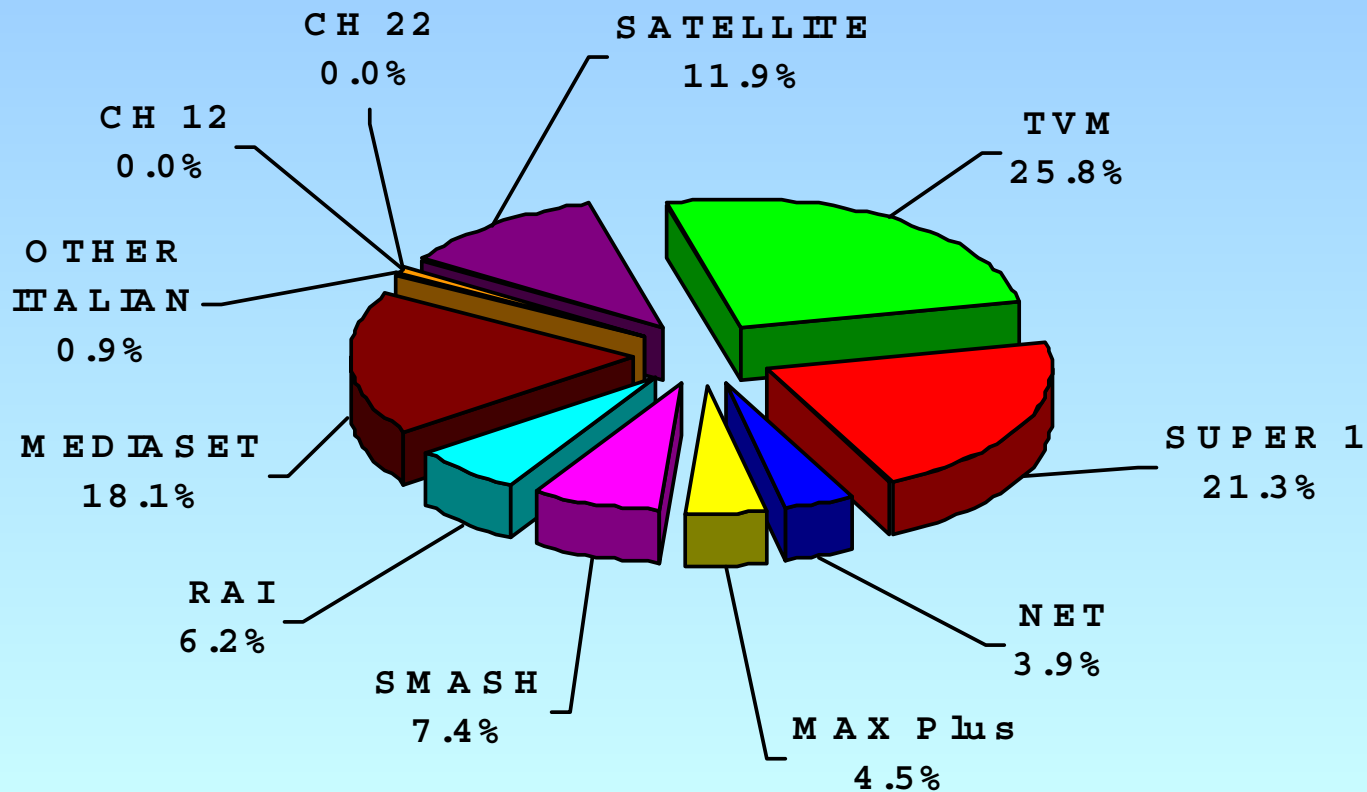
Time-Band Comparison in terms of Absolute Audience Size

1st Quarter 2001



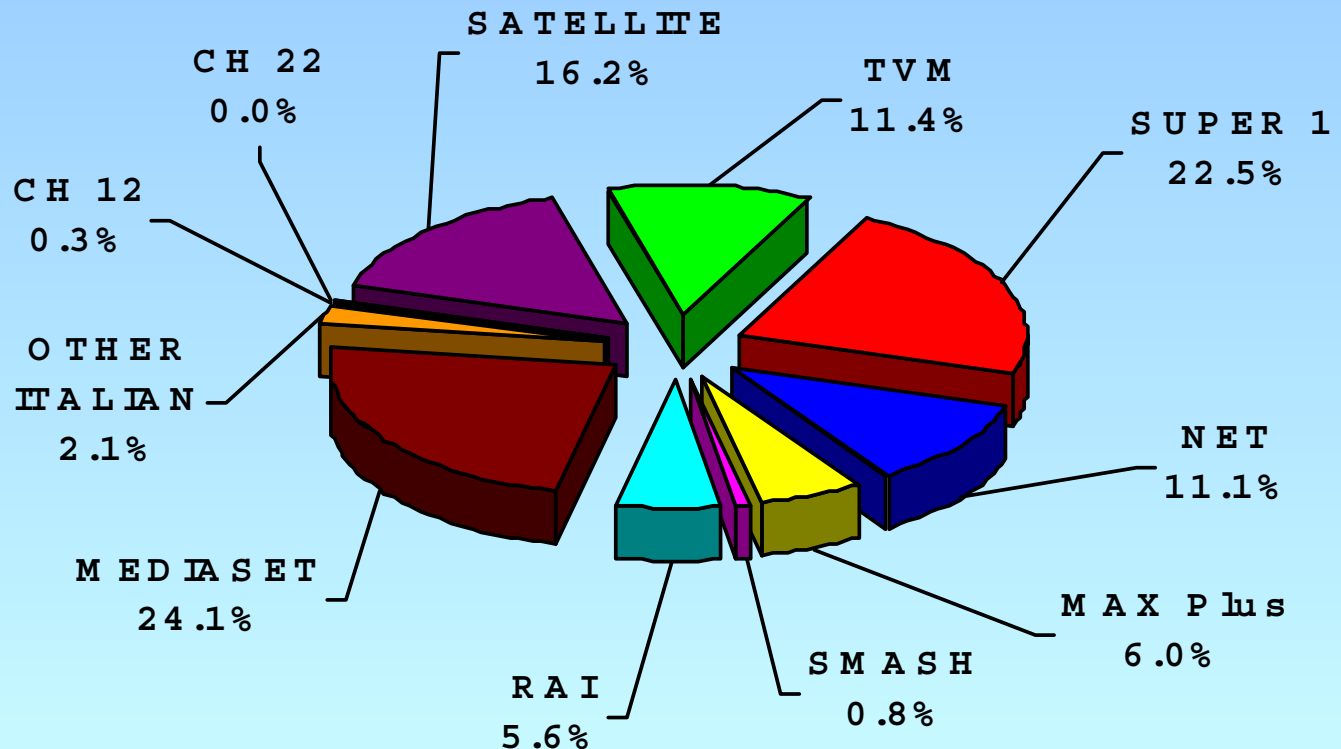
Daily Average TV Audience Levels

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



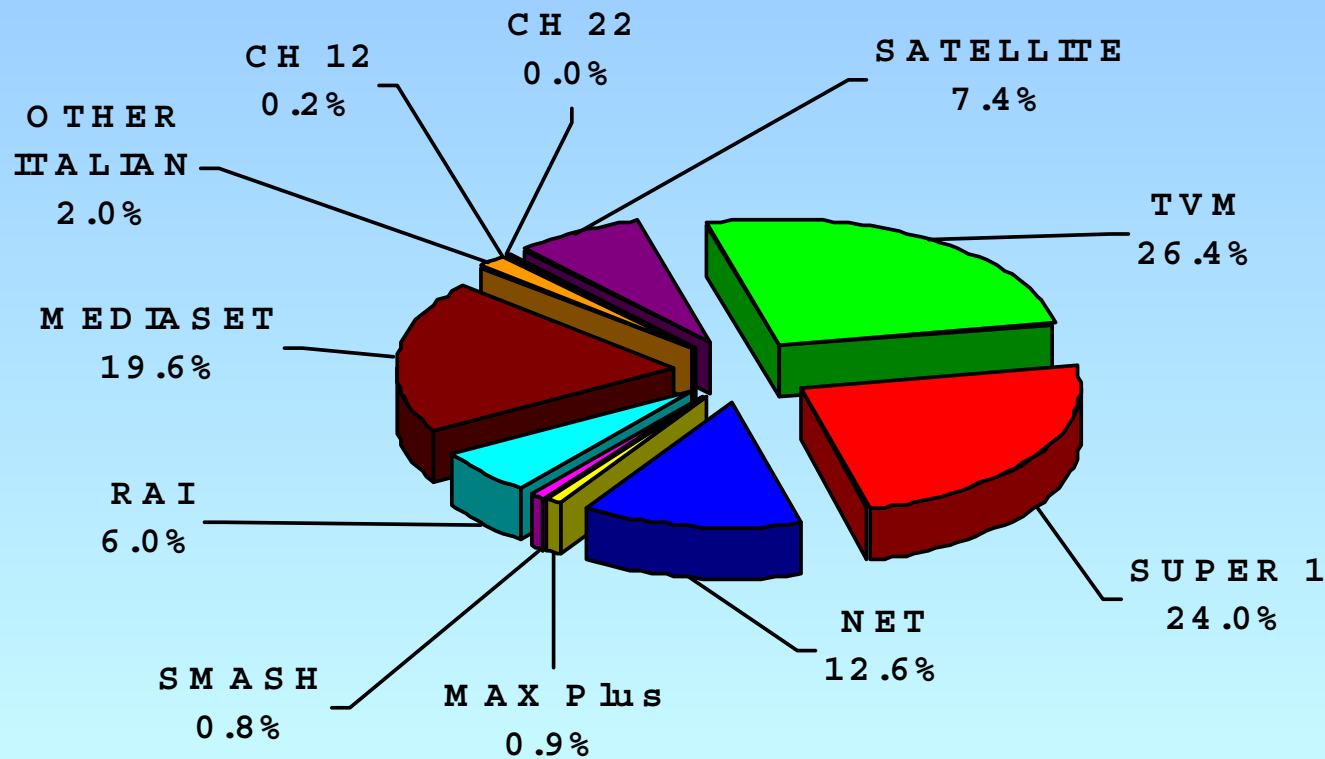
Daily Average TV Audience Levels

Cable Only - Time-Band 1: 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	26.3	11.2	26.5
Super 1 TV	23.2	22.5	24.1
NET	3.2	11.4	12.4
Max Plus	3.7	6.4	0.9
Smash TV	7.4	0.6	0.7
Channel 12	0.0	0.1	0.2
Channel 22	0.0	0.0	0.0
RAI	5.3	5.4	6.0
Mediaset	18.4	24.4	19.7
Other Italian	0.5	1.8	2.0
Satellite Stations	12.1	16.2	7.5

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	25.8	11.4	26.4
Super 1 TV	21.3	22.5	24.0
NET	3.9	11.1	12.6
Max Plus	4.5	6.0	0.9
Smash TV	7.4	0.8	0.8
Channel 12	0.0	0.3	0.2
Channel 22	0.0	0.0	0.0
RAI	6.2	5.6	6.0
Mediaset	18.1	24.1	19.6
Other Italian	0.9	2.1	2.0
Satellite Stations	11.9	16.2	7.4

Conclusions:

- ❑ Very little change in no of those who listen to Radio & TV

Trends in Radio Audience Share

6.00 am – Midnight

1st Quarter 2000 – 2001

■ **Increases**

- Radio Calypso (+5.1%)
- Capital Radio (+2.2%)
- Radju MAS (+0.7%)
- University Radio (+0.2%)

■ **No Change**

- Island Sound

■ **Decreases**

- Super 1 Radio (-2.5%)
- Bay Radio (-1.3%)
- Smash Radio (-0.7%)
- RTK (-0.6%)
- Radio Malta (-0.4%)
- Radio 101 (-0.2%)
- FM Bronja (-0.2%)

Radio Stations: Relative Strengths

- Super 1 – 22.9%
- RTK – 13.5%
- Radio 101 – 12.7%
- Capital – 11.2%
- Radio Calypso – 9.7%
- Bay Radio – 9.2%
- RM – 8.8%
- Smash – 4.0%
- Radju MAS – 3.9%
- Island Sound – 2.4%
- Radju Parlament – 0.9%
- FM Bronja - 0.7%
- University Radio - 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*
 - *Simpatici*

Trends in TV Audiences

- ❑ No Figures can be given for audience trends over one year period because of the new Time-Band System
- ❑ TVM is first in Time-Bands 1 & 3
- ❑ Super 1 is best station in Time-Band 2
- ❑ NET TV is second in Time Band 2
- ❑ Max Plus has its best audience level in Time-Band 2
- ❑ Smash TV has its best audience level in Time-Band 1

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

La Salle Issue

Audience Share Comparison

Thursday: La Salle Broadcast

	TVM	SUPER 1	NET	RAI	MEDIA SET	OTHER ITAL	SAT	NONE
2100	7.34	13.29	12.94	5.59	16.78	1.40	3.85	37.06
2130	5.24	13.99	10.14	5.94	18.53	1.40	3.15	39.86
2200	4.20	11.89	6.64	5.94	17.83	1.05	3.15	47.55

Audience Share Comparison

Time Band 1: Autumn 2000 – 1st Quarter 2001

	Aut. '00	1 st Qu. 01	Differ.
TVM	19.5	26.3	+6.8
Super 1 TV	22.1	23.2	+1.1
NET	0	3.2	+3.2
Max Plus	3.9	3.7	-0.2
Smash TV	3.9	7.4	+3.5
Channel 12	-	-	-
Channel 22	1.9	0	-1.9
RAI	4.5	5.3	+0.8
Mediaset	20.8	18.4	-2.4
Other Italian	0	0.5	+0.5
Satellite Stations	23.4	12.1	-11.3

Audience Share Comparison

Time Band 2: Autumn 2000 – 1st Quarter 2001

	Aut '00	1 st Qu. 01	Differ.
Super 1 TV	27.6	22.5	-5.1
TVM	7.9	11.2	+3.3
NET	12	11.4	-0.6
Max Plus	7	6.4	-0.6
Smash TV	0.4	0.6	+0.2
Channel 12	0.1	0.1	0.0
Channel 22	0.9	0	-0.9
RAI	7.4	5.4	-2.0
Mediaset	22.6	24.4	+1.8
Other Italian	1.7	1.8	+0.1
Satellite Stations	12.3	16.2	+3.9

Audience Share Comparison

Time Band 3: Autumn 2000 – 1st Quarter 2001

	Aut. '00	1 st Qu. 01	Differ.
TVM	25.4	26.5	+1.1
Super 1 TV	29.3	24.1	-5.2
NET	14.5	12.4	-2.1
Max Plus	0.4	0.9	+0.5
Smash TV	0.4	0.7	+0.3
Channel 12	0.4	0.2	-0.2
Channel 22	0.1	0	-0.1
RAI	6.6	6	-0.6
Mediaset	15.5	19.7	+4.2
Other Italian	0.9	2	+1.1
Satellite Stations	6.4	7.5	+1.1

Audience Share Comparison

Radio: Autumn 2000 – 1st Quarter 2001

	A u t . ' 0 0	1 st Q u . 0 1	D i f f e r .
S u p e r 1	2 8 . 5	2 2 . 9	- 5 . 6
R T K	1 6	1 3 . 5	- 2 . 5
R a d i o 1 0 1	1 4	1 2 . 7	- 1 . 3
C a p i t a l	4 . 3	1 1 . 2	+ 6 . 9
B a y	1 3	9 . 2	- 3 . 8
C a l y p s o	4 . 4	9 . 7	5 . 3
R a d j u M a l t a	7 . 8	8 . 8	+ 1 . 0
S m a s h	4 . 1	4	- 0 . 1
R a d j u M A S	4	3 . 9	- 0 . 1
I s l a n d S o u n d	2 . 1	2 . 4	0 . 3
R a d j u P a r l a m e n t	1 . 6	0 . 9	- 0 . 7
F M B r o n j a	0 . 2	0 . 7	+ 0 . 5
U n i v e r s i t y R a d i o	0 . 2	0 . 2	0 . 0

Thank you for your attention!