TV & Radio Audiences in Malta

Broadcasting Authority

Mario Vassallo

October 1999

BA Audience Audit October 1999

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..."

- letter from BA to MUS dated 7 March 1997

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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

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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 1999 Studies: aged 12 and over

BA Audience Audit October 1999 Sample Profile: Gender Age Group Total Male Female % 11.4 21.4 37.1 % 11.2 12-17 18-30 31-50 11.0 20.5 37.0 17.8 21.0 37.1 51-65 18.2 18.6 over 65 12.6 11.4 13.7 100.0 511 51.0 TOTAL 100.0 N= 1001 100.0 490 100 49.0

Who	Listens	to Rad	io
	Total	Male	Female
N=	1001	490	511
	%	%	%
Listen to the Radio	74.6	70.8	78.3
Do Not Listen to the Radio	254	29.2	21.7

Sample 1	Profile: Socio-Economic					
Socio- Economic Group	Total	АВ	C1	C2	DE	
N =	1001	154	321	283	243	
	%	%	%	%	%	
12-17	11.2	12.3	14.3	9.5	8.2	
18-30	21.0	24.7	24.3	18.0	17.7	
31-50	37.1	36.4	34.9	36.7	40.7	
51-65	18.2	16.9	16.8	20.5	18.1	
over 65	12.6	9.7	9.7	15.2	15.2	
TOTAL	100.0	100.0	100.0	100.0	100.0	

	BA Au	dience A	udit Octobe		
Average 1	Average Number of Hours				
Radio	Radio is Listened to				
	Total	Male	Female		
N=	747	347	400		
	%	%	%		
Varies Considerably	1.7	1.7	1.8		
One Hour	34.3	38.9	30.3		
Two Hours	18.3	20.5	16.5		
Three Hours	12.2	12.4	12.0		
Four to Nine Hours	28.9	22.4	34.5		
Ten Hours and					
more	4.6	4.1	4.9		

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Where is Radio Listened to

	Total	Male	Female
N=	747	347	400
	%	%	%
NA	3.3	3.2	3.5
At home	76.0	68.0	83.0
At work	16.6	23.6	10.5
In the car	29.3	39.8	20.3

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Average No. of Hours TV is watched

	Total	Male	Female
N=	986	484	502
	%	%	%
Varies Considerably	0.8	0.4	1.2
One Hour	23.2	24.4	22.1
Two Hours	28.5	30.6	26.5
Three Hours	22.4	22.7	22.1
More than three Hours	25.1	21.9	28.1

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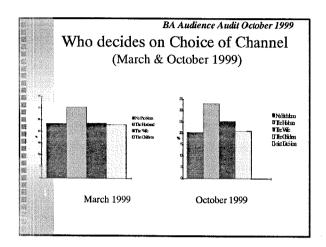
Who watches TV

8		Total	Male	Female
	N=	1001	490	511
		%	%	%
	Watch TV	98.5	98.8	98.2
	Do Not watch TV	1.5	1.2	1.8

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Where TV is Watched

	Total	Male	Female
N=	986	484	502
	%	%	%
Sitting Room	45.7	49.2	42.4
Dining Room	4.9	4.1	5.6
Kitchen	22.3	17.6	26.9
Bedroom	26.0	28.3	23.7
Another Place	1.1	0.8	1.4

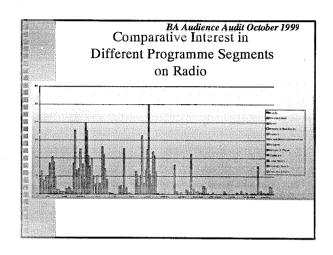


	В	A Audien	ce Audit (October 1999			
	Preferred Source for Local News						
		Total	Male	Female			
	N=	1001	490	511			
		%	%	%			
	No Preference	1.5	1.4	1.6			
	Radio	12.7	11.2	14.1			
	TV	73.6	73.3	74.0			
	Newspaper	8.0	10.2	5.9			
i I.	rom Other Persons	4.2	3.9	4.5			

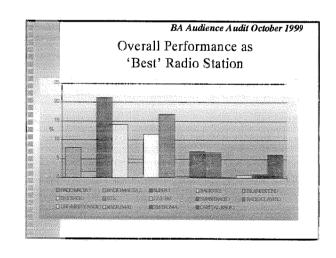
		BA Au	dience Au	dit Octobe	r 1999
(Cable '	TV Fa	acilitio	es	
	Total	AB	C1	C2	DE
N=	1001	154	321	283	243
	%	%	%	%	%
Connected	57.4	71.1	61.1	51.9	51.0
Reception	18.7	11.0	17.1	20.5	23.5
Basic	20.7	29.2	23.1	18.0	15.2
TV Plus	18.1	29.9	20.9	13.4	12.3
Movie Channel	13.7	14.8	15.3	15.0	809
Soorts Channel	19.0	22.2	20.9	19.0	125

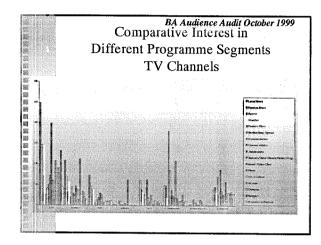
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Preferred Source	£ 101	ruiei	ign 146
500 500 500 500 500 500 500 500 500 500	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	3.7	4.1	3.3
Radio	10.3	8.8	11.7
TV	75.6	74.7	76.5
Newspaper	7.0	9.4	4.7
From Other Persons	3.4	3.1	3.7

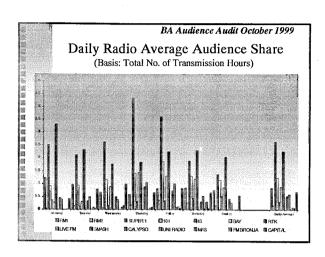
		BA Au	dience A	udit Oct	ber 1999		
	General Preferen	ce for l	Prograi	nme S	ectors		
10 E	(Radio: 1997, 1998 & 1999)						
	PROGRAMME SECTOR	%	%	%	%		
		1997	1998	1999 (March)	1999 (October)		
25 98	Music	78.9	87.2	87.4	74.6		
	Local News	70.6	84.5	80.5	73.0		
44	Foreign News	63.9	77.1	76.9	63.7		
	Discussions	58.1	67.6	59.7	56.0		
	Religion	31.6	54.5	51.0	37.8		
	Health/Beauty/Home/Law	31.2	56.8	54.3	37.1		
	Current Affairs	34.7	53.3	47.1	36.3		
Ø.	Culture	29.1	45.8	44.4	25.8		
	Sports	27.9	49.5	40.7	28.5		
	Novels/Plays	29.0	48.2	37.2	25.4		
B.	Money/Business	16.7	31.7	25.2	13.5		
	Children	15.9	30.2	25.8	13.3		

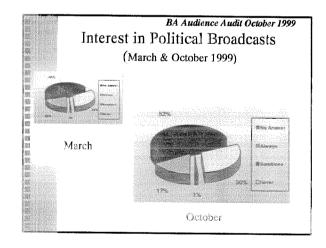


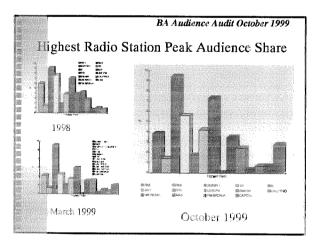
General Preference	BA Audience Audit October 15 eneral Preference for Programme Sector (TV: 1998 & 1999)					
Programme Segments	1998	1999 (March)	1999 (October			
Local News	94.6	93.1	88.0			
Foreign News	88.9	90.7	84.4			
Feature Films	77.5	77.9	73.0			
Weather	81.2	76.4	65.4			
Discussions	72.1	73.8	68.6			
Documentaries	66.3	73.5	59.1			
Quizzes/Game Shows/Variety Progr.	70.1	66.8	59.9			
Serials/Soap Operas	61.4	66.7	47.5			
Sports	63.0	62.7	56.2			
Current Affairs	44.8	53.0	40.6			
Maligion	44.3	48.8	39.0			
Plays	54.4	46.0	51.1			
Music Video-Clips	45.5	44.1	37.6			
As & Culture	44.8	44.7	33.7			
Women's Programmes	47.4	43.4	37.2			
Calidren's Programmes	47.0	43.5	37.3			
Business & Finance	27.0	23.7	24.0			

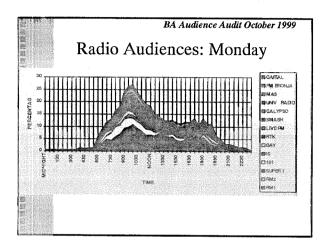


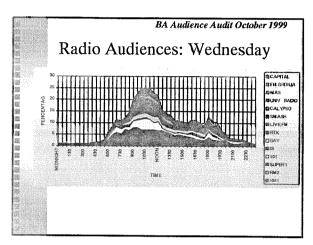


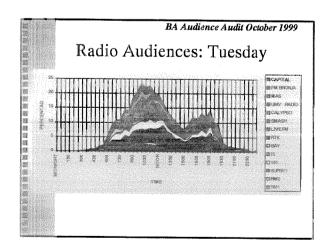


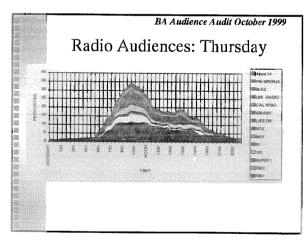


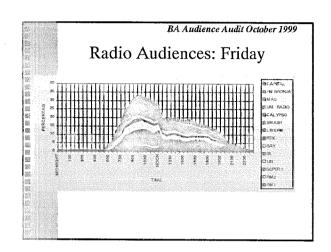


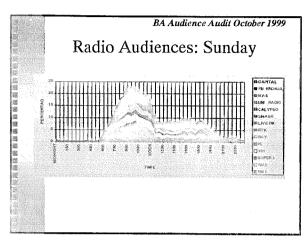


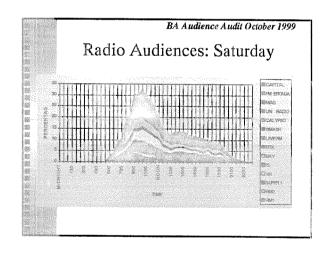








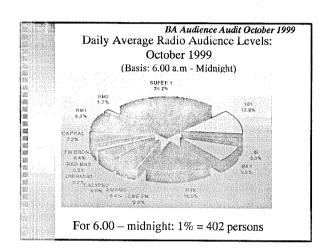


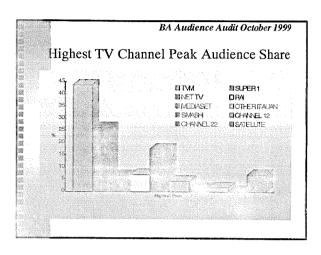


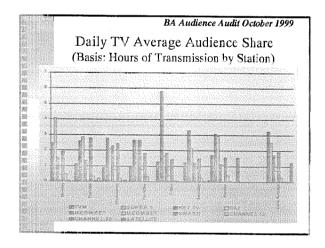
BA Audience Audit October 1999 Meaning of %

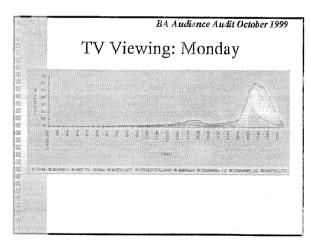
- The meaning of 1% in the following pie chart is different from the meaning of 1% of any of the tables in the report
- % in the following pie charts = the proportional share of audience from the total audience for the respective segment (i.e. Radio or TV) [slice of the cake when the cake = total audience of either Radio or TV]

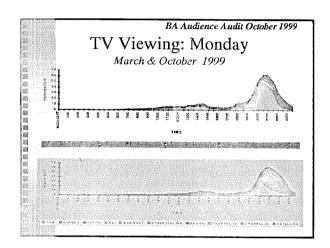
Radio:For 6.00 - midnight1% = 402 persons 1% (March=470)
*For midnight to midnight 1% = 306 persons [March=316]
TV 1%=316 [March=322]

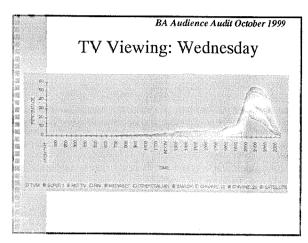


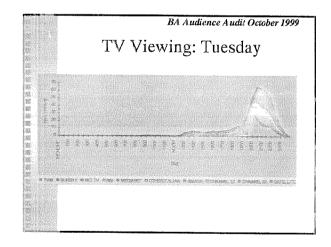


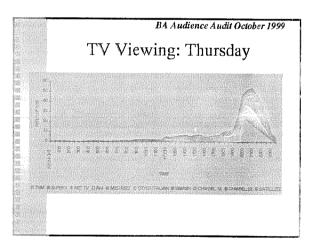


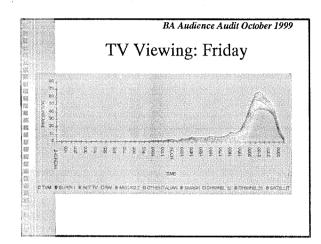


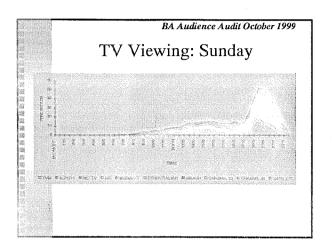


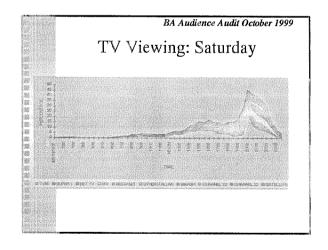


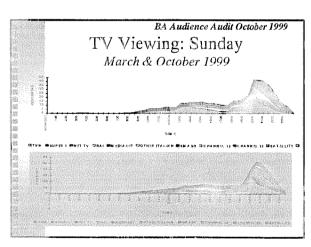


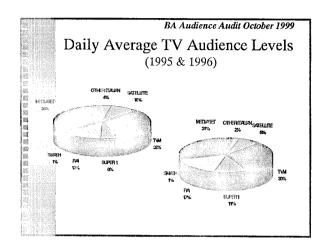








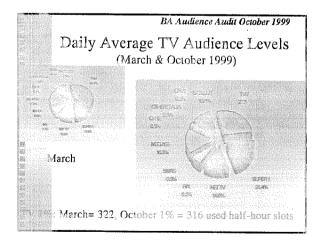




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Conclusions: Absolute size of Audiences

- In general the absolute size of radio audiences has gone down
 - ♦ 1998: 81.3%
 - March 1999: 77.0% vs. October 1999: 74.6%
- the absolute size of TV audiences has similarly gone down, but proportionately less than for radio
 - 1998: 98.3%
 - March 1999: 96.2% vs. October 98.5%



BA Audience Audit October 1999 Trends in Radio Audience Share 6.00 am - Midnight ■ Increases ■ Decreases ♦ RTK (+5.9%) → Super 1 Radio (-6%) « Capital (+2%) « Radio Malta 1 (-1.3%) * Radio 101 (+1.4%) * Radio Calypso (-1.3%) → Bay Radio (1.4%) ♦ Island Sund (-1%) ♦ University Radio (+0.1%) → Radju MAS (-0.6%) • Radio Malta 2 (-0.2% No Change ◆ FM Bronja (-0.2%) · Smash Radio

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Radio Stations: Relative Strengths

™ Capital - 7.2%

■ RTK – 18.0%

■ Island Sound - 3.3%

Radio 101 − 12.9%

Radio Malta 2 - 1.7%

■ RM1 – 8.3%

■ Radju MAS – 0.8%

■ Bay Radio – 9.0%

FM Bronja - 0.4%

■ Radio Calypso – 6.0% ■ University Radio - 0.2%

■ Smash - 5.4%

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TV Programmes Propulairty

- Mews Bulletin continues to register very but not always the highest audience level
- Some programmes exceed their respective station's news bulletin:
 - 4 Xarabank
 - * Tghid Giet Hekk Hux?
 - ♦ Televixin
- M Xhieda is the second most popular TV programme if the average audience per 1/2 hour slot is computed.

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Source for News

- Main source remains TV
 - * TV 73.6% 1st preference
 - ⇒ radio: 12.7% 1st preference
 - * newspapers: 8% 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

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Trends in TV Audience Shares

Locreases

Decreases

Super 1 (+8.9%)

Satellite (+2.8%)

* RAI (-1.5%)

♦ NET TV (+2.4%) Other Italian (+0.9%)

♦ Smash (-0.3%)

♦ Channel 22 (+0.2%)

♦ Channel 12 (-0.2%)

No Change

Channel 12