

TV & Radio Audiences in Malta

Broadcasting Authority

Mario Vassallo

4th 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	72.3	69.8	74.8
Do Not Listen to the Radio	27.7	30.2	25.2

Average Number of Hours Radio is Listened to

		Total	Male	Female
	N=	724	342	382
		%	%	%
Varies Considerably		1.4	1.8	1.0
	One Hour	30.8	33.0	28.8
	Two Hours	20.4	23.7	17.5
	Three Hours	14.6	11.4	17.5
	Four to Nine Hours	30.3	27.5	32.6
	Ten Hours and more	2.5	2.6	2.6

Where is Radio Listened to

	Total	Male	Female
N=	724	342	382
	%	%	%
NA	1.2	1.5	1.0
At home	76.5	65.8	86.1
At work	16.9	25.4	9.2
In the car	26.1	39.5	14.1

Who watches TV

	Total	490	511
N=	1001		
	%	%	%
Watch TV	98.1	98.8	97.5
Do Not watch TV	1.9	1.2	2.5

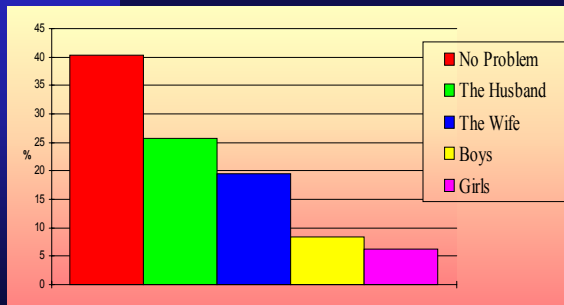
Average No. of Hours TV is watched

	Total	Male	Female
N=	982	484	498
	%	%	%
Varies Considerably	0.7	0.8	0.6
One Hour	10.4	11.6	9.2
Two Hours	32.2	33.1	31.3
Three Hours	26.6	27.7	25.5
More than three Hours	30.0	26.8	33.4

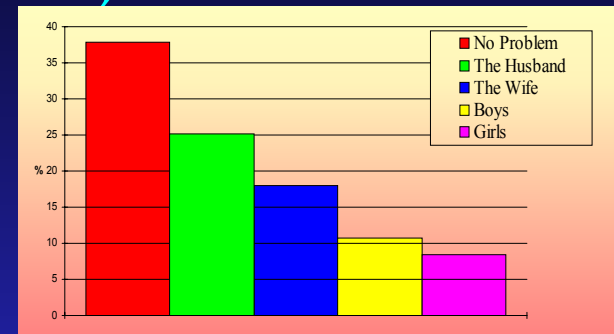
Where TV is Watched

	Total	Male	Female
N=	982	484	498
	%	%	%
Sitting Room	57.5	59.3	55.8
Dining Room	5.1	5.2	5.0
Kitchen	13.7	11.8	15.7
Bedroom	22.4	22.3	22.5
Another Place	1.2	1.4	1.0

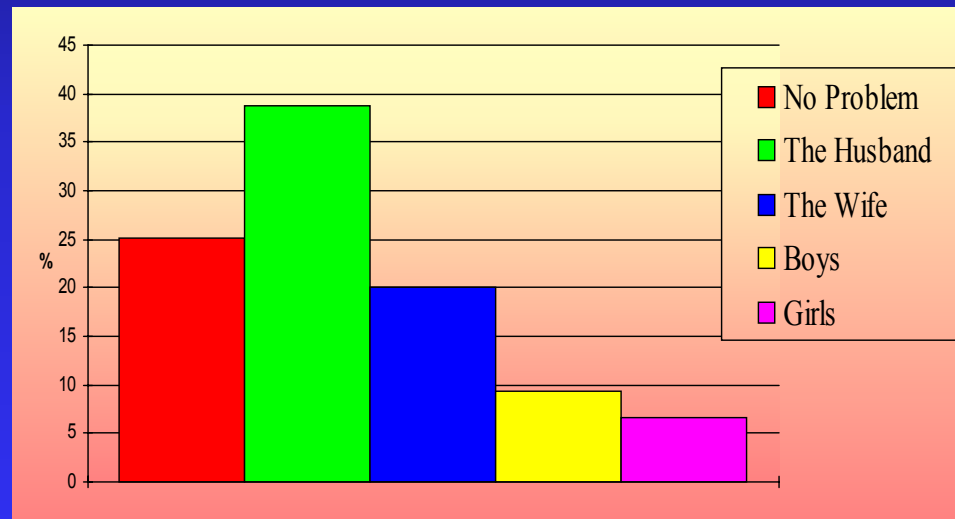
Who decides on Choice of Channel (2000 - 2001)



Last Quarter 2000



1st Quarter 2001



Last Quarter 2001

Cable TV/Satellite Dish Facilities

Base= All

	Total	AB	C1	C2	DE
N=	1001	166	286	248	301
<u>Cable</u>	%	%	%	%	%
Not-Connected	33.9	29.5	31.5	36.7	36.2
Connected	66.1	70.5	68.5	63.3	63.8
<u>Satellite</u>					
Dish Antenna	12.7	16.3	14.0	12.5	9.6

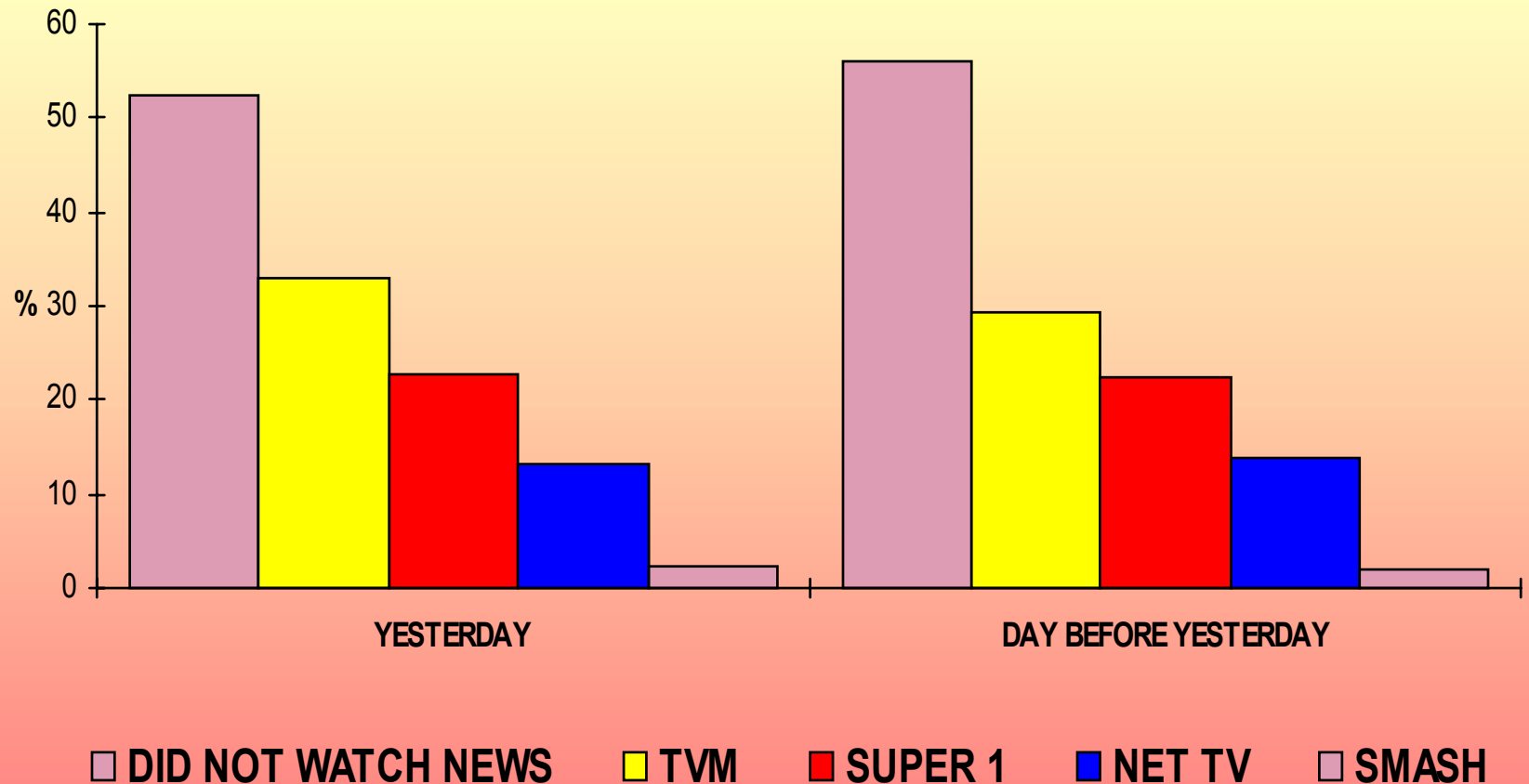
Preferred Source for Local News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.3	0.6	2.0
Radio	7.1	5.5	8.6
TV	84.9	85.5	84.3
Newspaper	4.6	5.9	3.3
From Other Persons	2.1	2.4	1.8

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.4	0.6	2.2
Radio	6.1	5.1	7.0
TV	87.0	87.3	86.7
Newspaper	3.4	4.5	2.3
From Other Persons	2.1	2.4	1.8

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



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

	1999 (October)	2000 (October)	2001 (October)
Music	74.6	88.9	86.3
Local News	73.0	84.5	76.0
Foreign News	63.7	82.6	72.7
Discussions on Personal Problems	56.0	68.3	54.1
Current Affairs	37.1	59.1	41.6
Health/Beauty/Home/Law	37.8	49.0	37.2
Religion	36.3	43.6	34.9
Culture	25.8	40.2	32.5
Novels/Plays	28.5	35.4	32.3
Women's Programmes	Not Available	30.2	29.4
Sports	25.4	41.0	27.3
Money/Business	13.5	29.9	18.8
Children	13.3	27.2	12.3

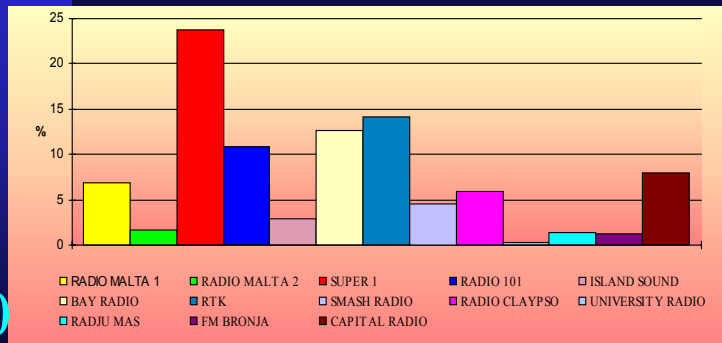
General Preference for Programme Sectors

(TV: 1999 – 2001 – 4th Quarter)

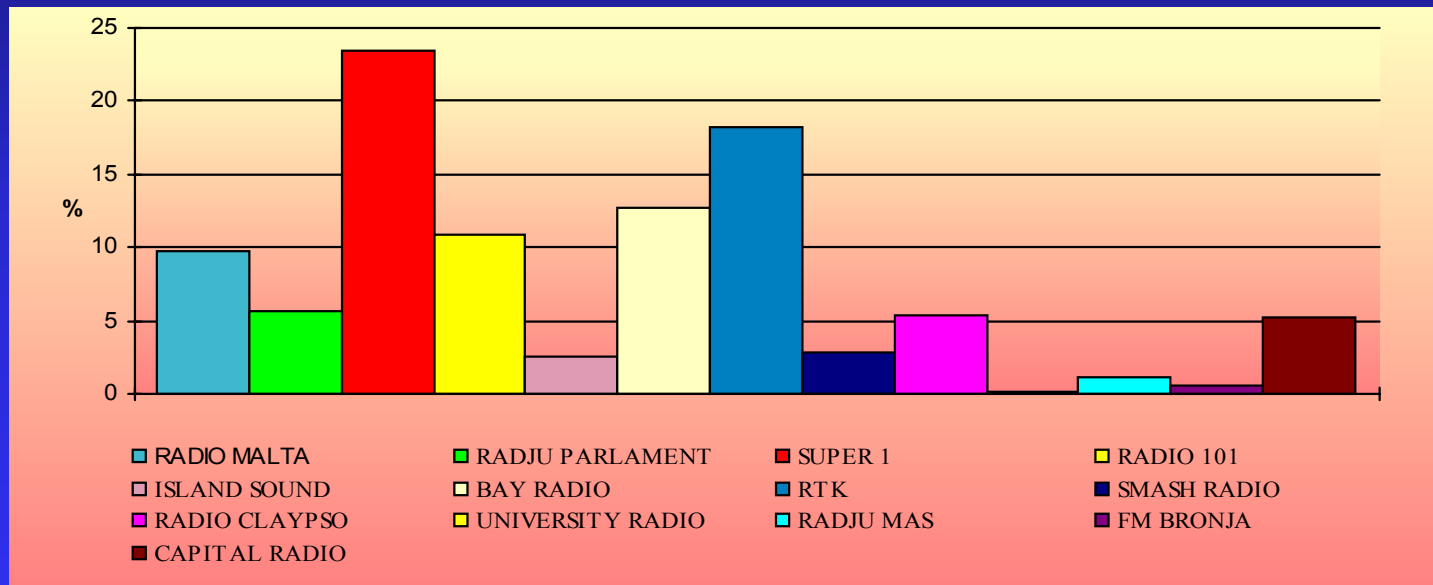
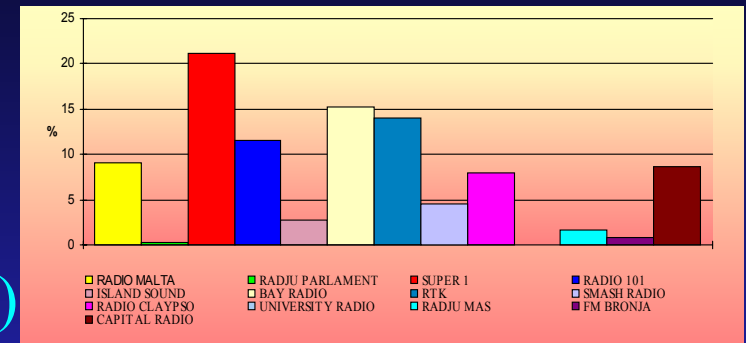
PROGRAMME SECTOR	1999 (October)	2000 (October)	2001 (October)
Local News	88.0	95.0	94.9
Foreign News	84.4	94.8	94.8
Feature Films	73.0	81.0	78.8
Discussions	68.6	73.6	71.8
Documentaries	59.1	71.8	70.0
Weather	65.4	75.9	61.9
Sports	56.2	65.4	61.1
Plays	51.1	56.0	61.0
Serials/Soap Operas	47.5	58.6	56.5
Current Affairs	40.6	50.9	45.2
Religion	39.0	43.4	35.4
Women's Programmes	37.2	39.6	37.4
Music Video-Clips	37.6	41.0	35.3
Art & Culture	33.7	39.2	33.5
Quizzes/Game Shows/Variety Progr.	59.9	69.9	32.1
Children's Programmes	37.3	38.7	30.9
Business & Finance	24.0	29.6	19.0

Overall Performance as 'Best' Radio Station

2000

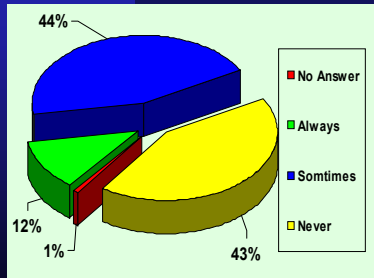


2001(a)



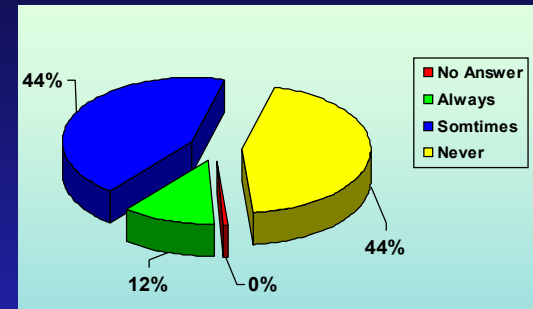
Last Quarter 2001

Interest in Political Broadcasts (1999 – 2001)

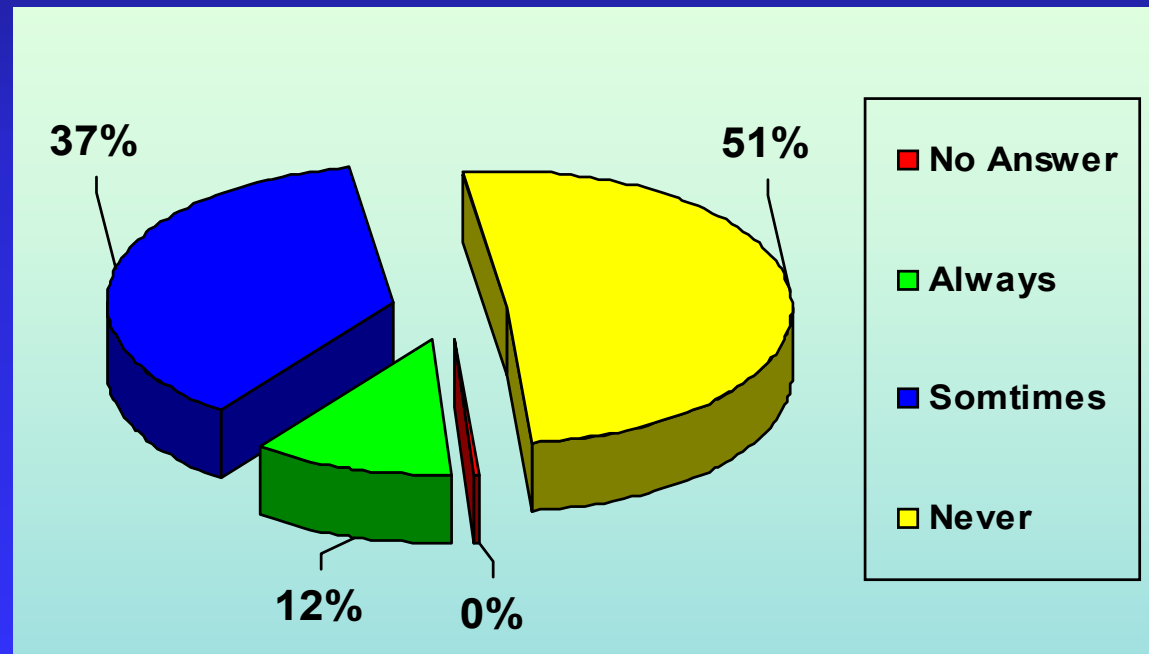


2000

2001(a)

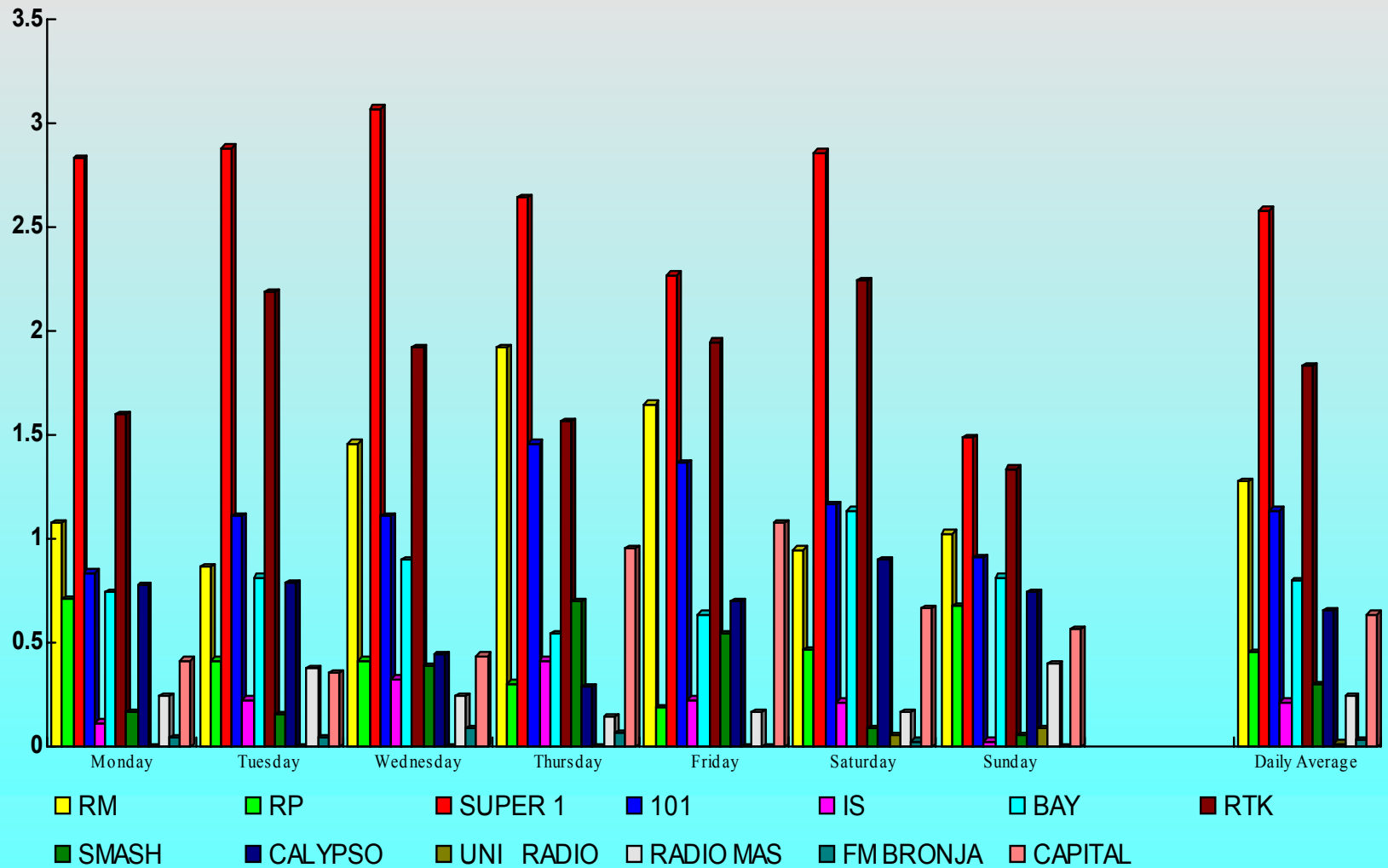


Last Quarter
2001

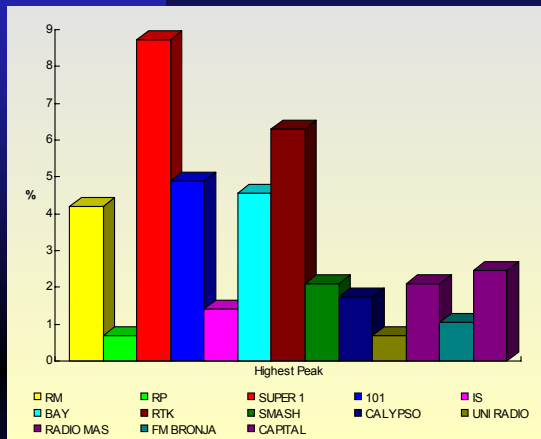


Daily Radio Average Audience Share

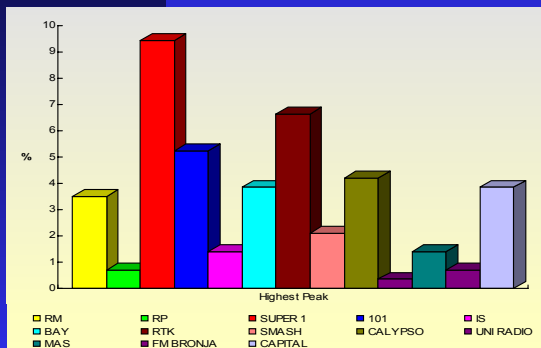
(Basis: Total No. of Transmission Hours)



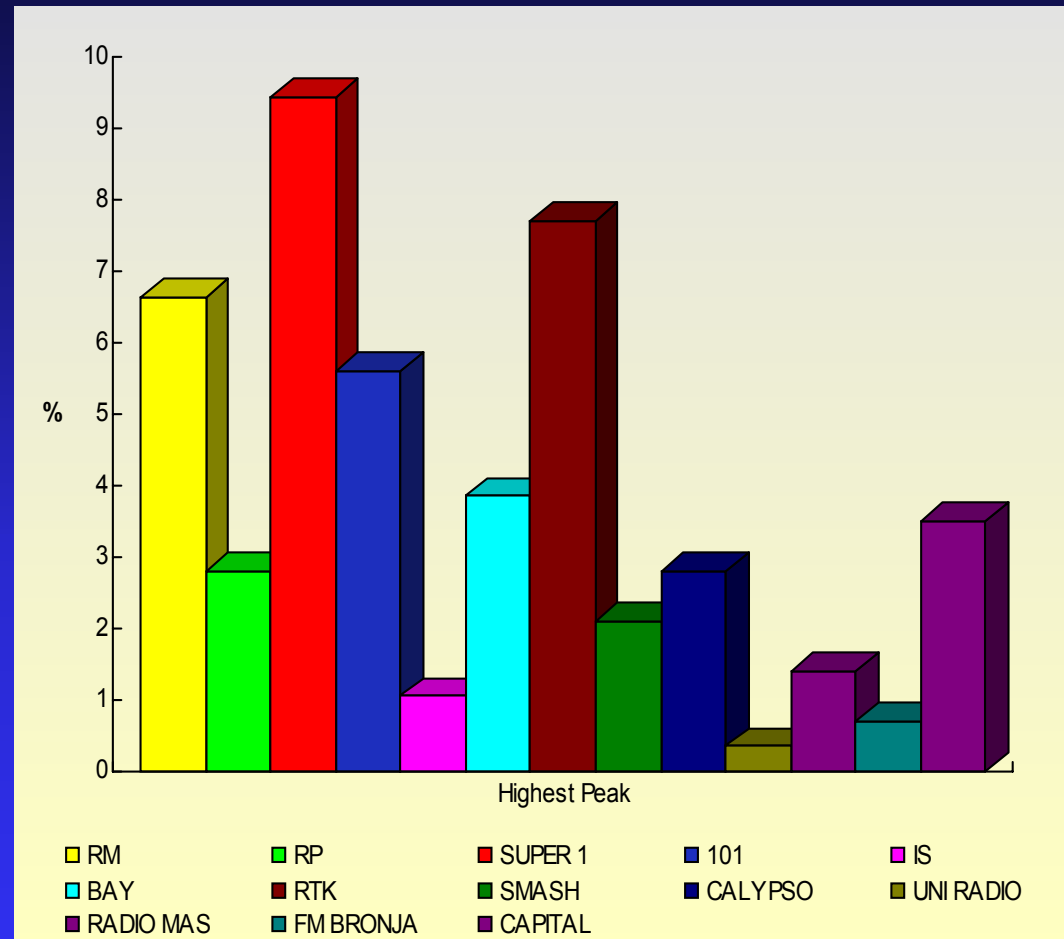
Highest Radio Station Peak Audience Share



2000

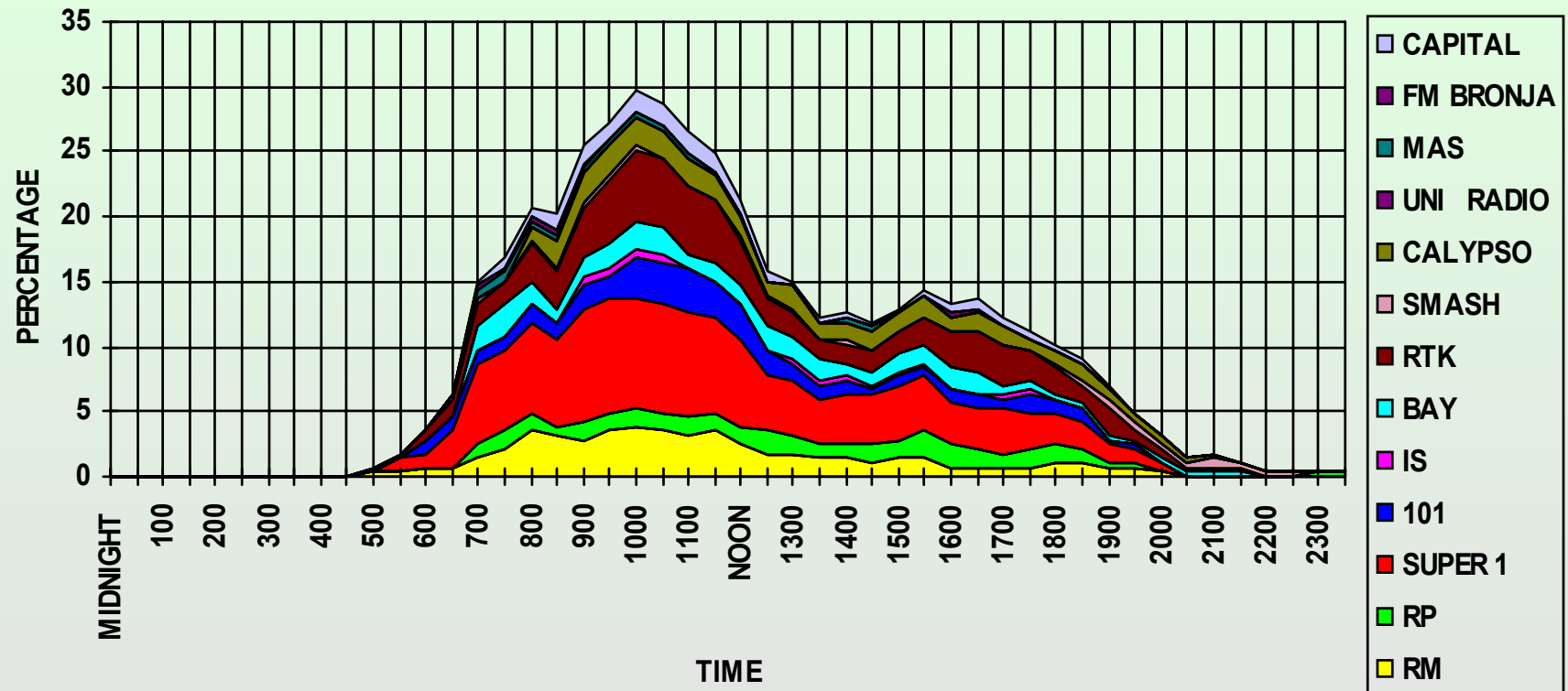


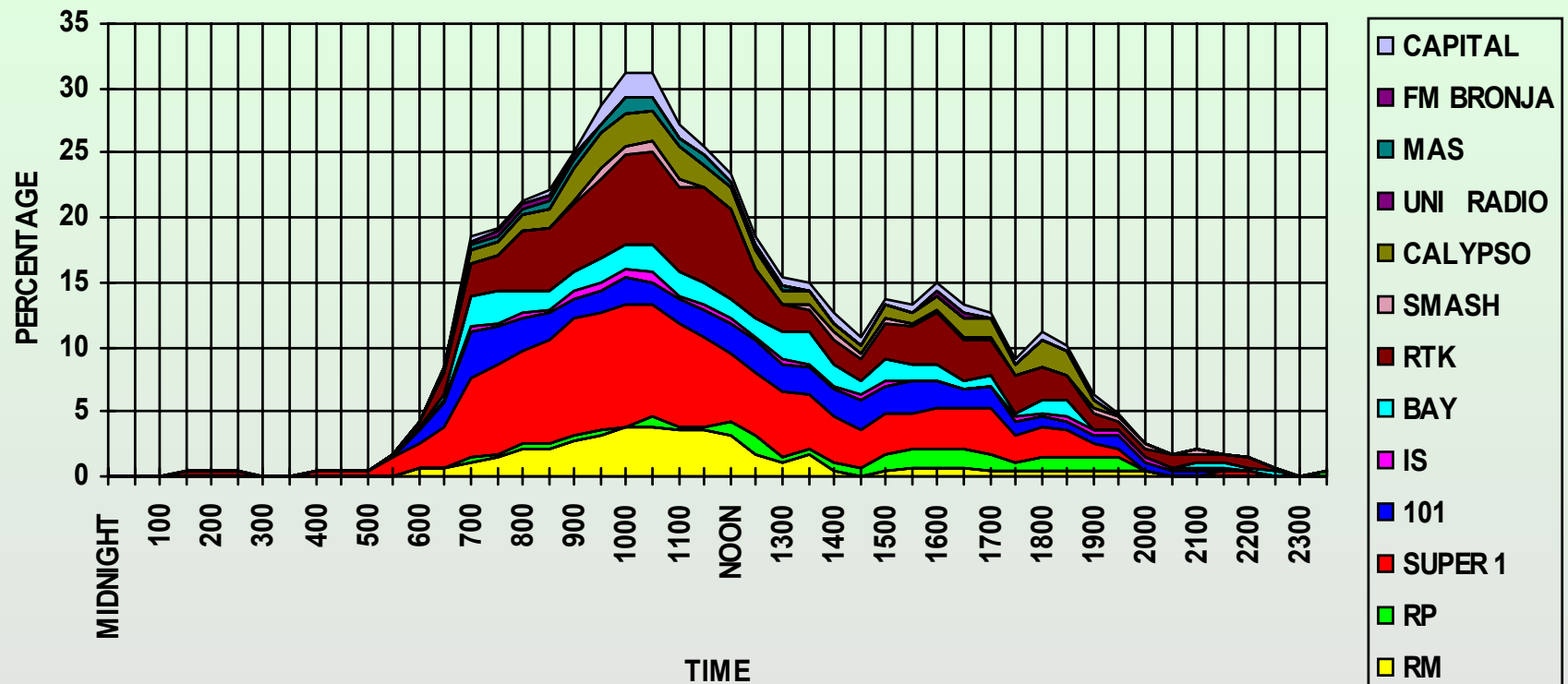
2001a

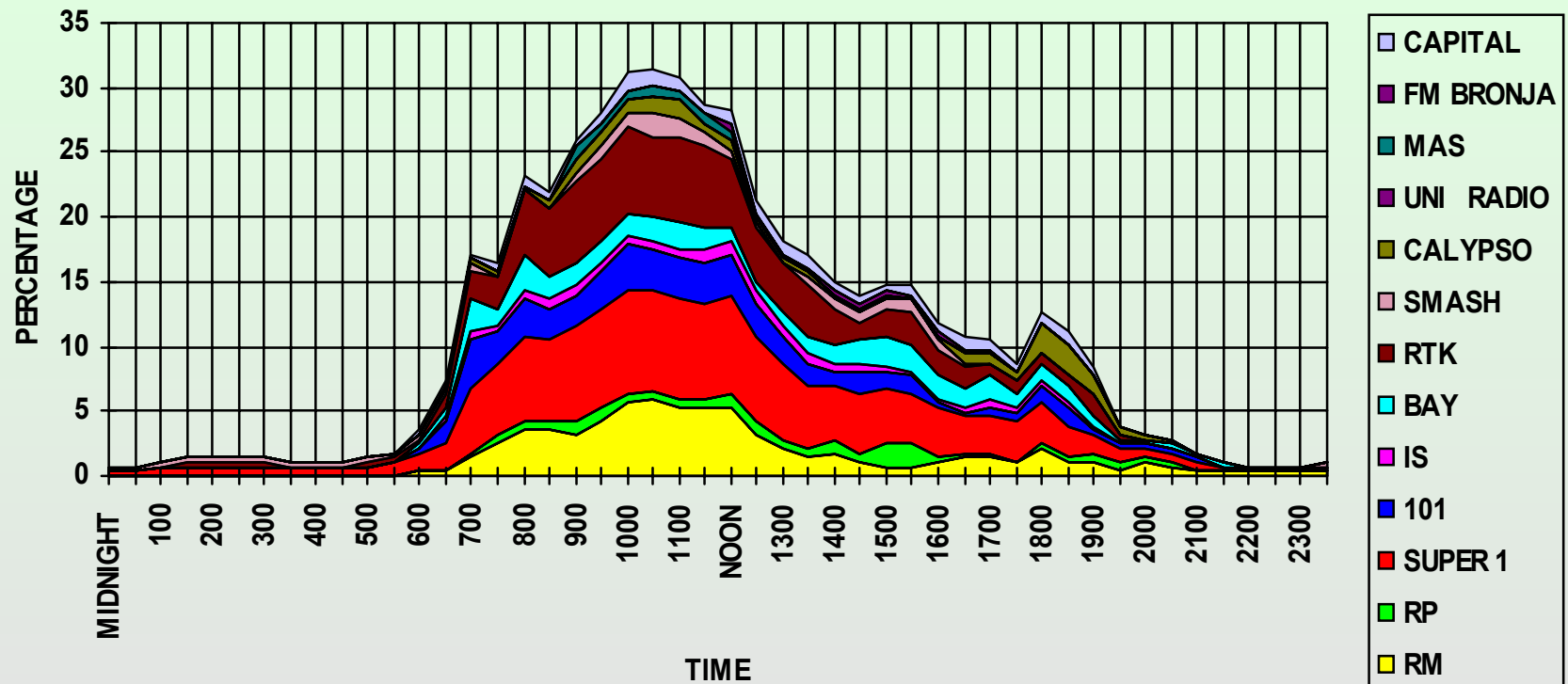


Last Quarter 2001

Radio Audiences: Monday

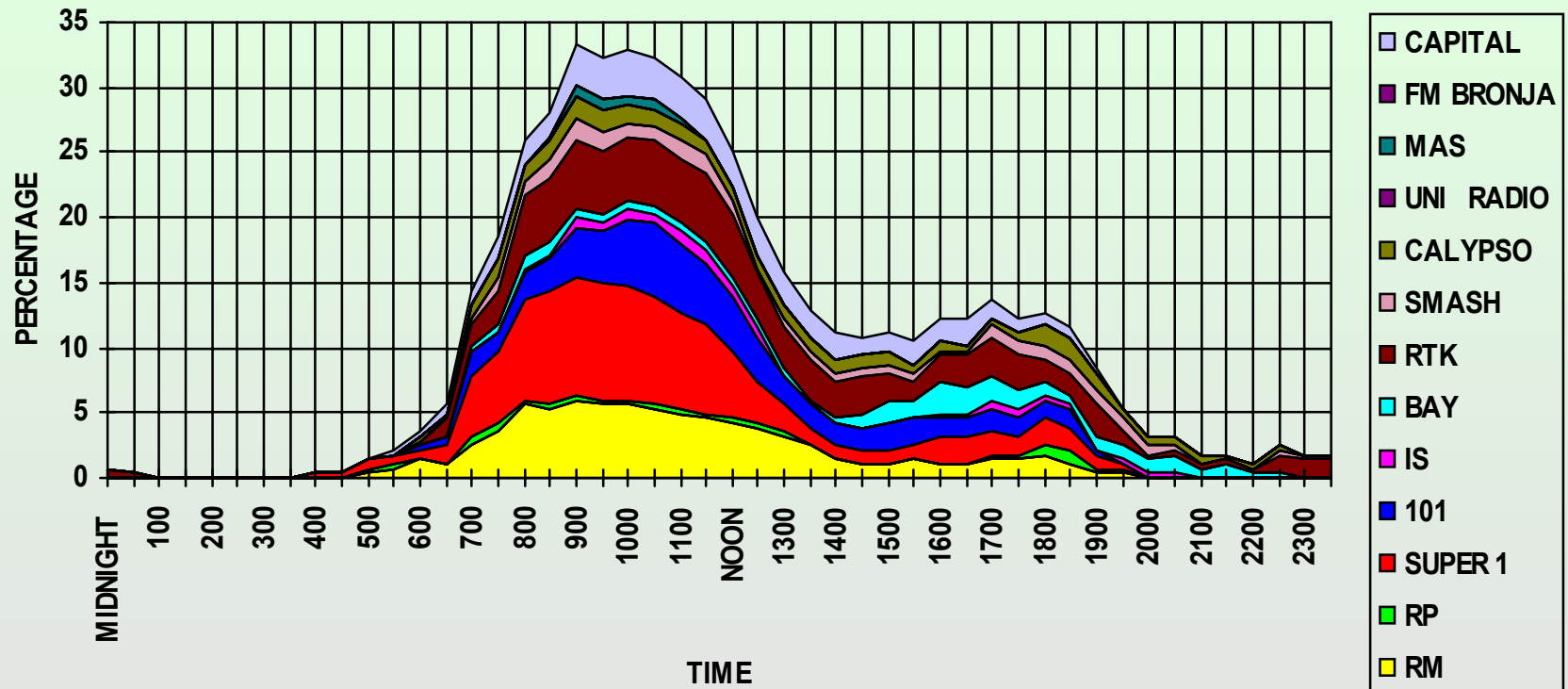


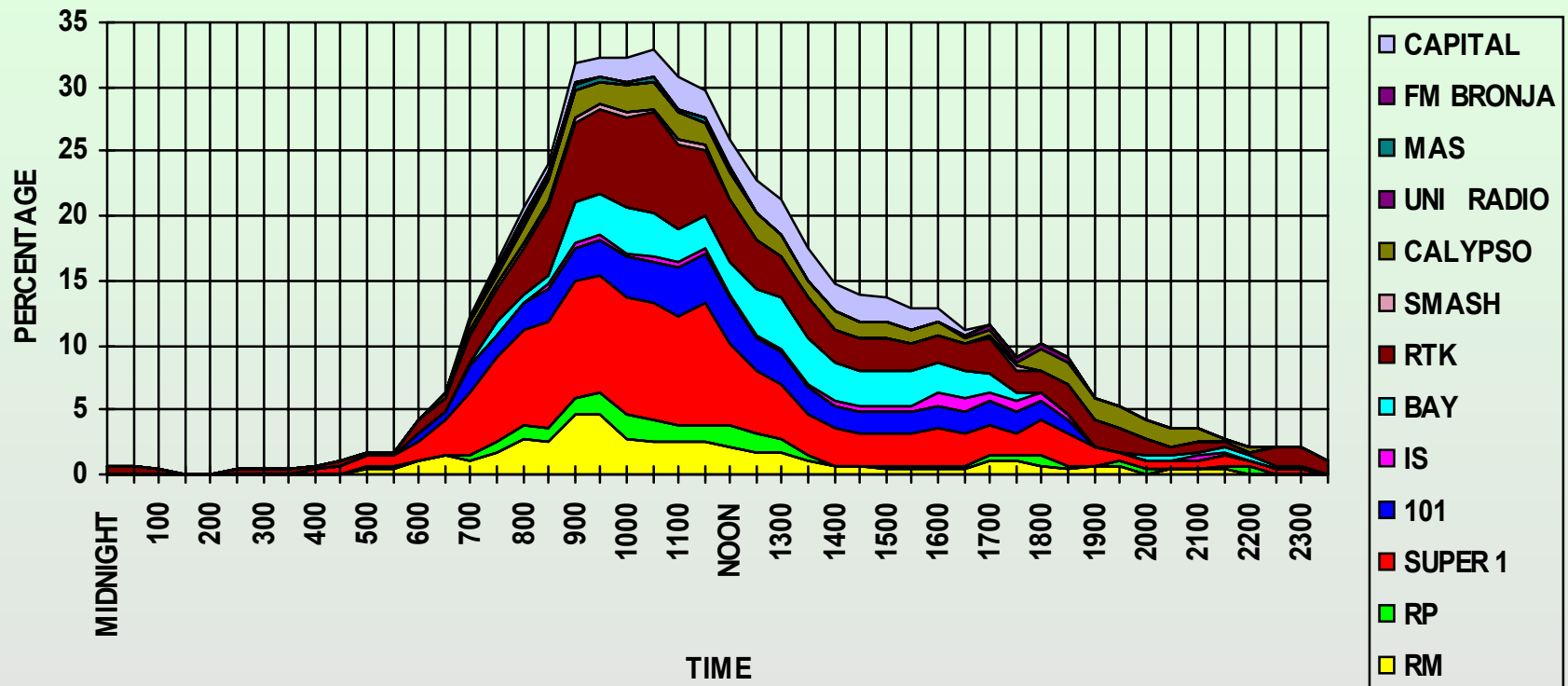


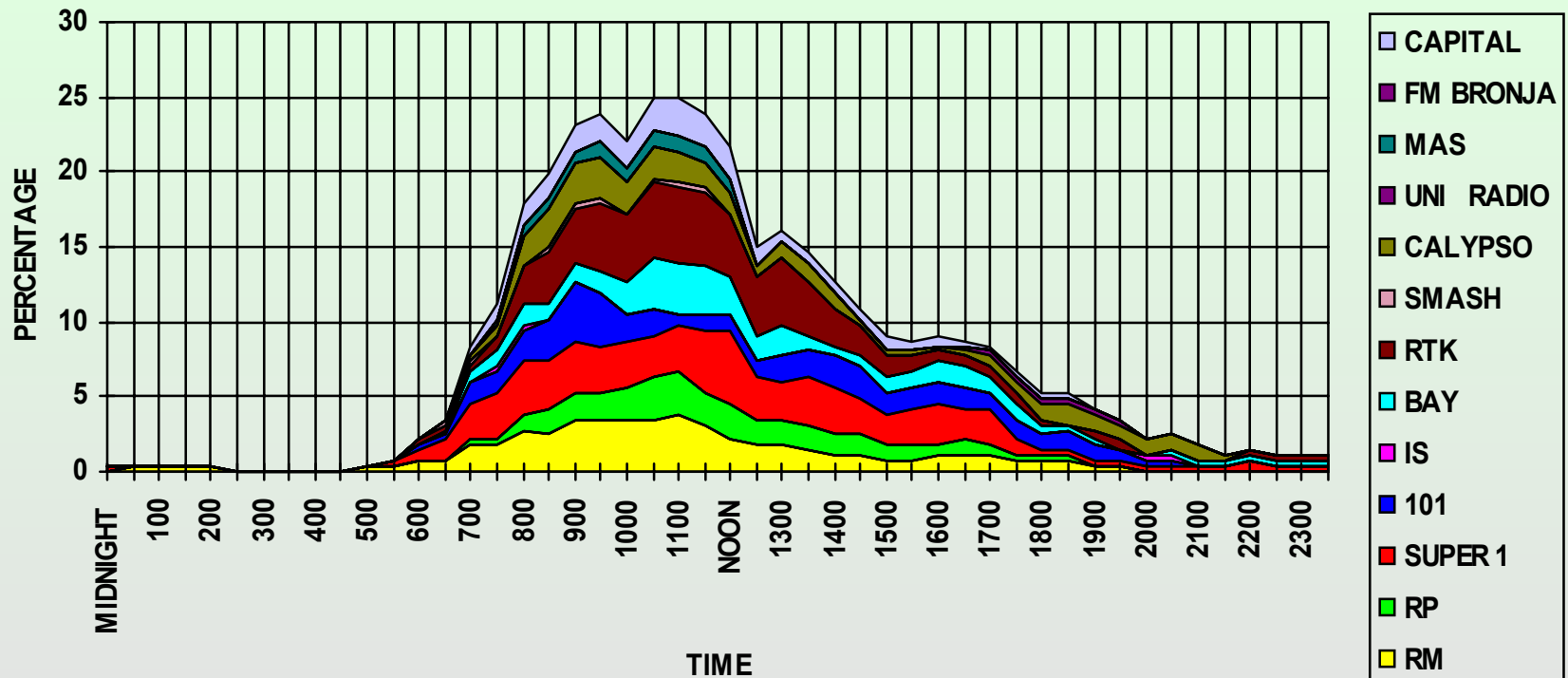




Radio Audiences: Friday







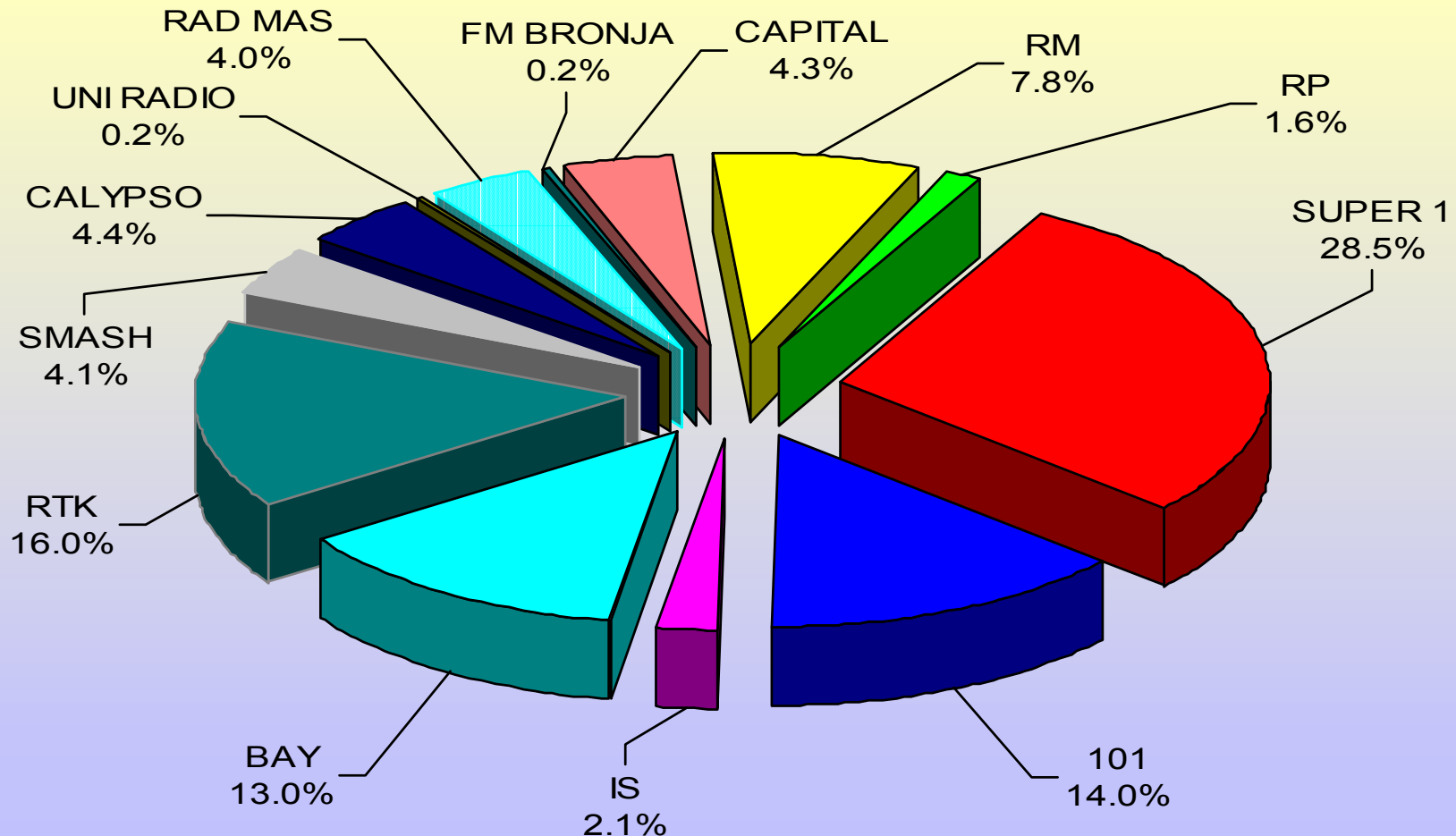
Meaning of %

- ❑ 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.
- ❑ Last Quarter 2001
 - ❖ Radio:
 - All Available Slots: 1% = 316 persons
 - 6.00 – Midnight: 1% = 415 persons
 - ❖ TV:
 - B1: 1% = 71 persons
 - B2: 1% = 347 persons
 - B3: 1% = 1256 persons

Daily Average Radio Audience Levels:

Last Quarter 2000

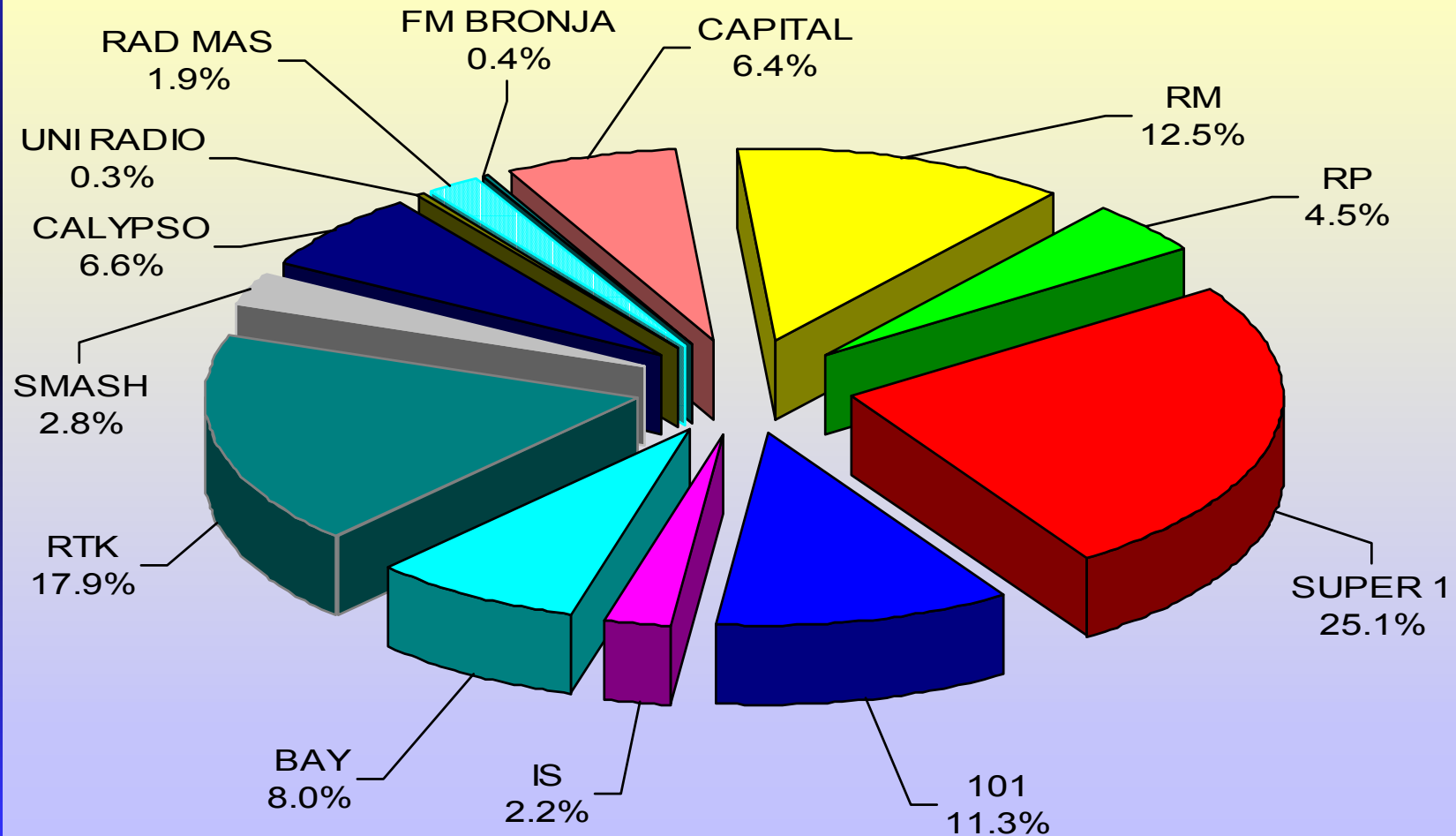
(Basis: 6.00 a.m - Midnight)



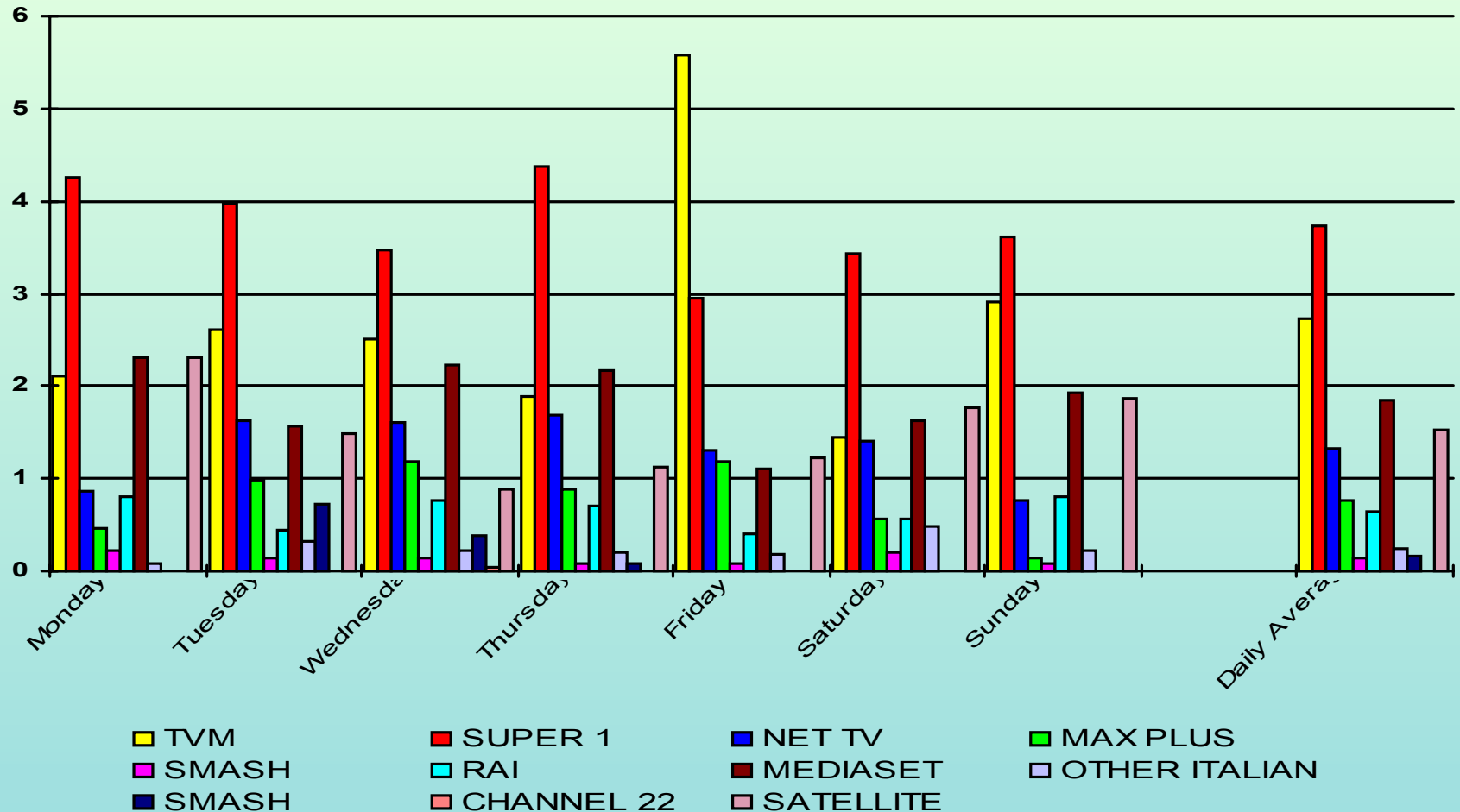
Daily Average Radio Audience Levels:

Last Quarter 2001

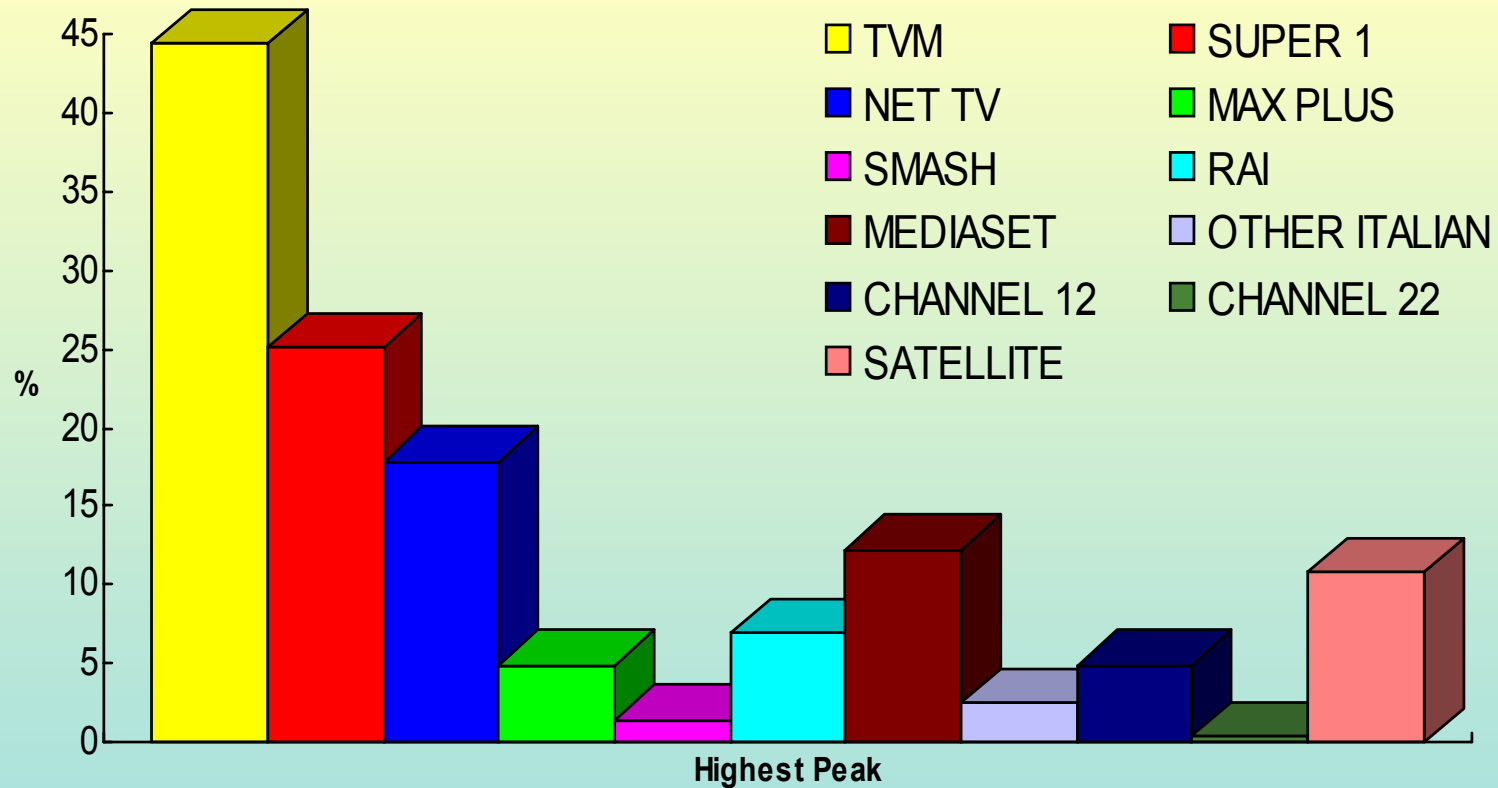
(Basis: 6.00 a.m - Midnight)

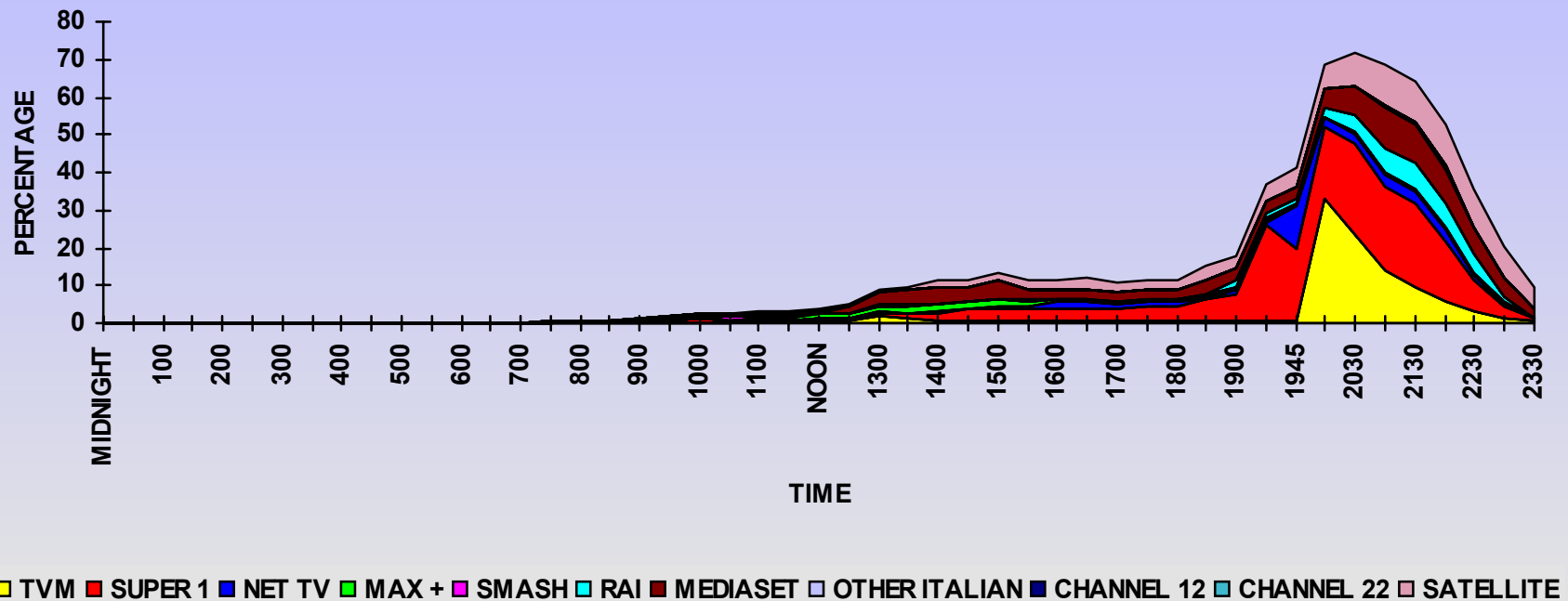


Daily TV Average Audience Share (Basis: Hours of Transmission by Station)

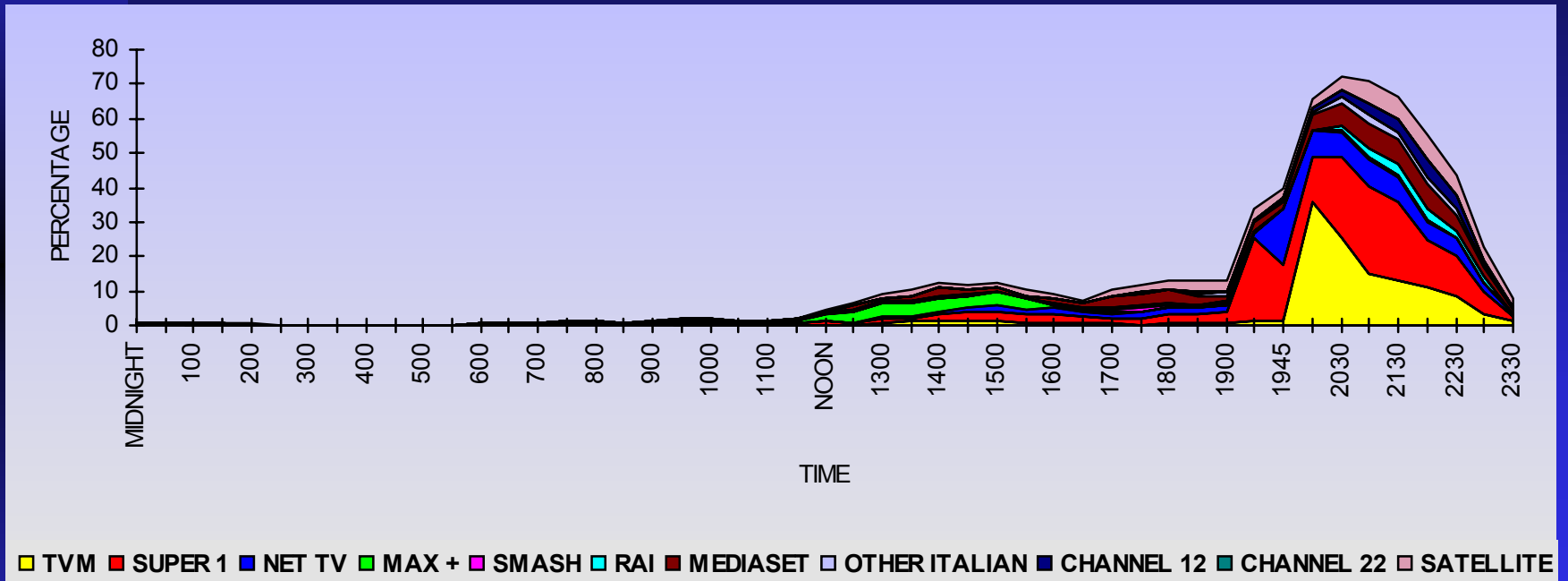


Highest TV Channel Peak Audience Share

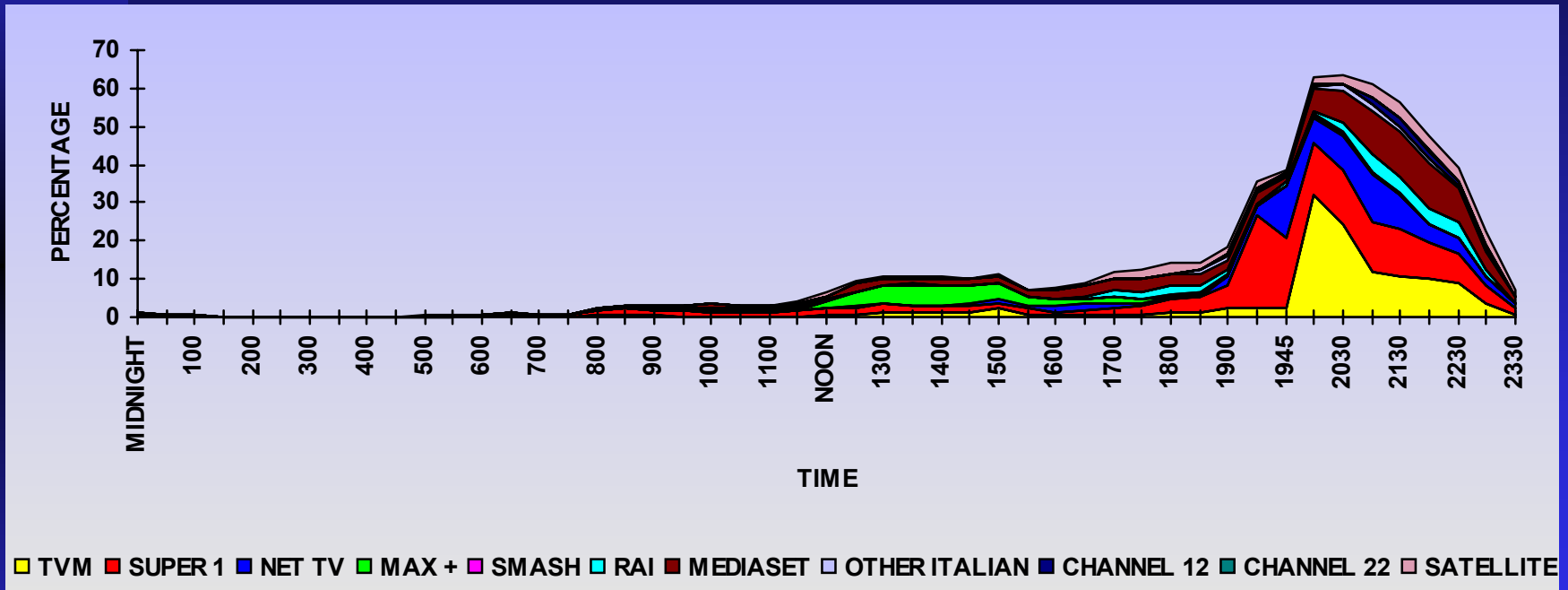


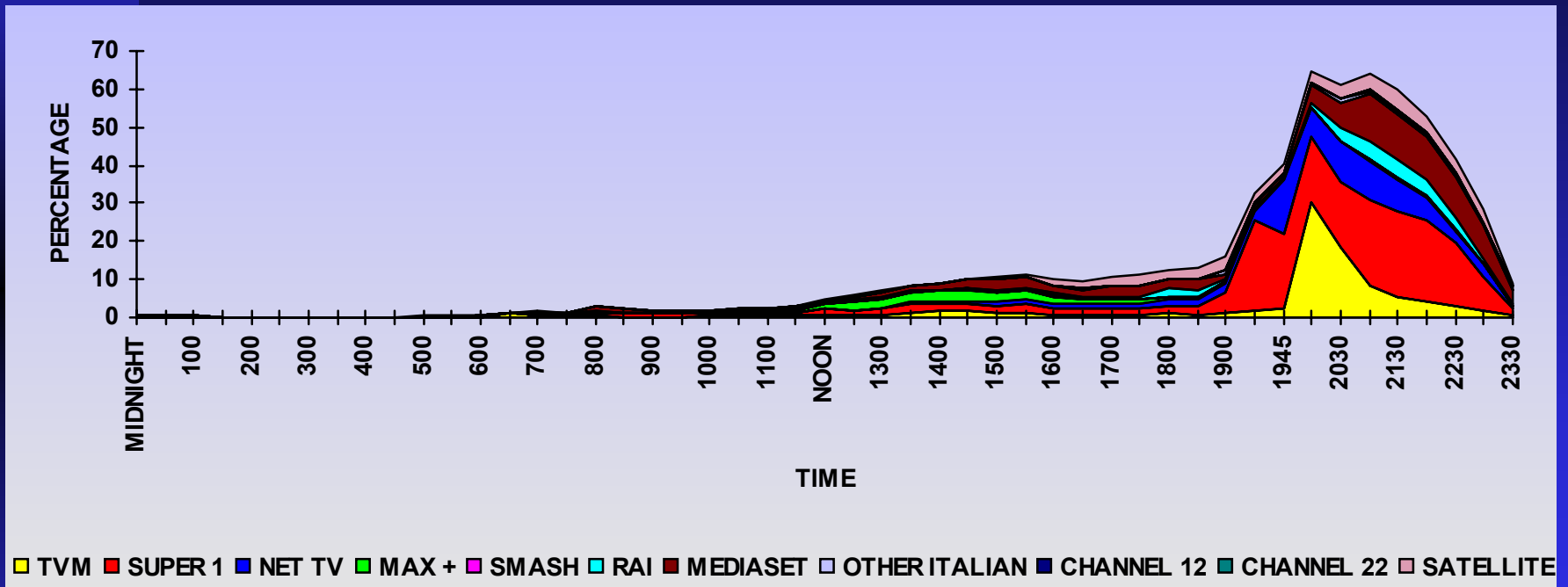


TV Viewing: Tuesday

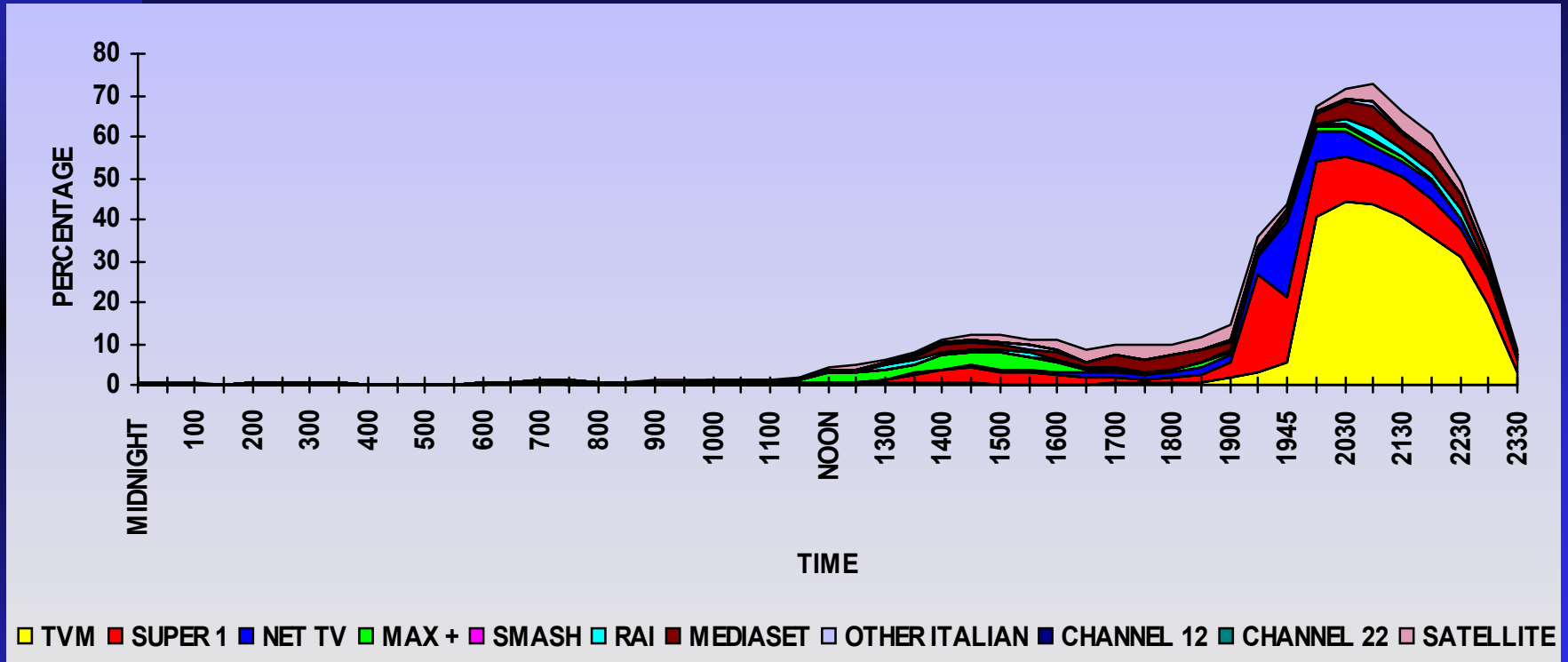


TV Viewing: Wednesday

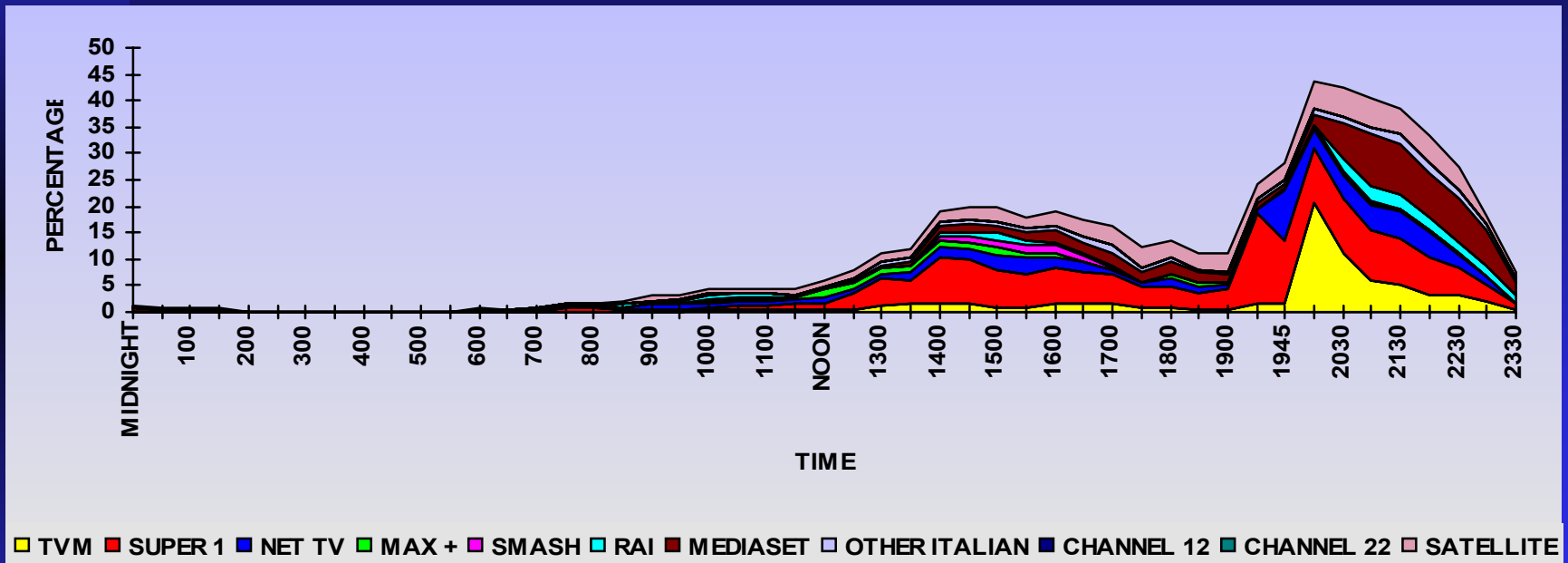


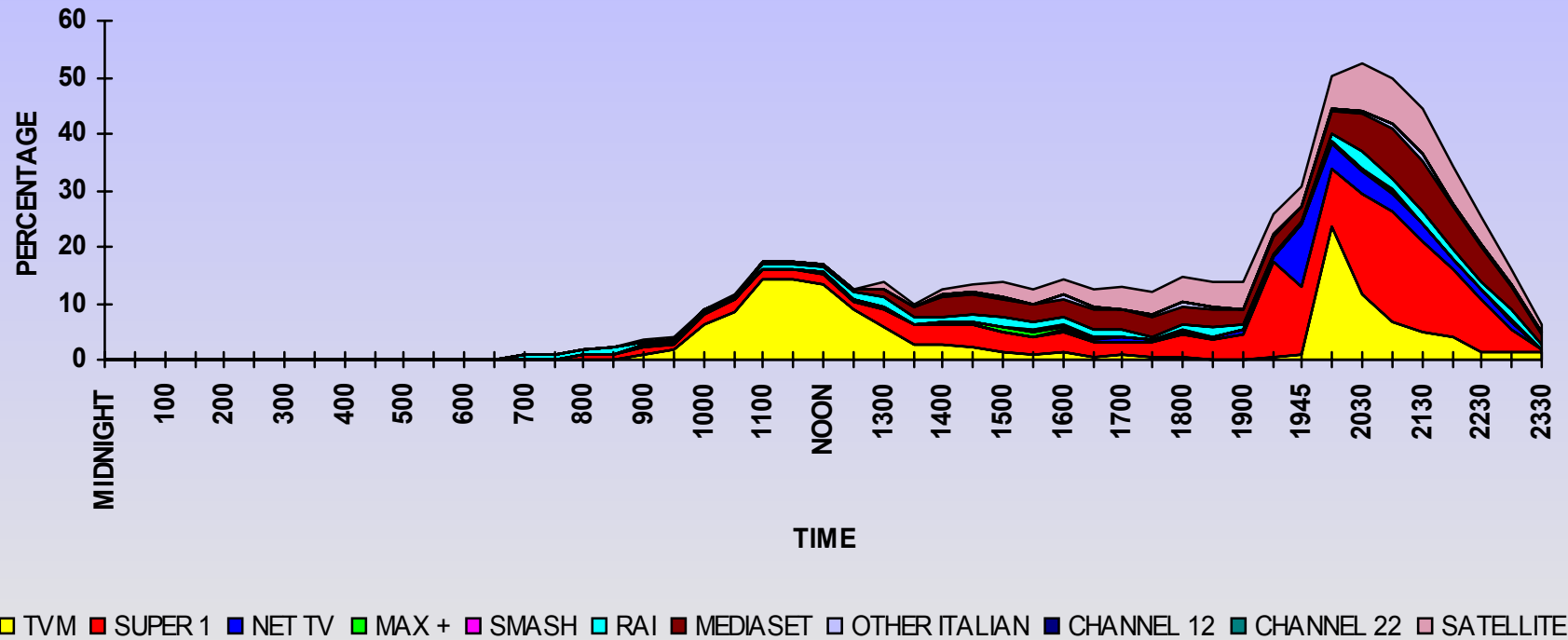


TV Viewing: Friday



TV Viewing: Saturday





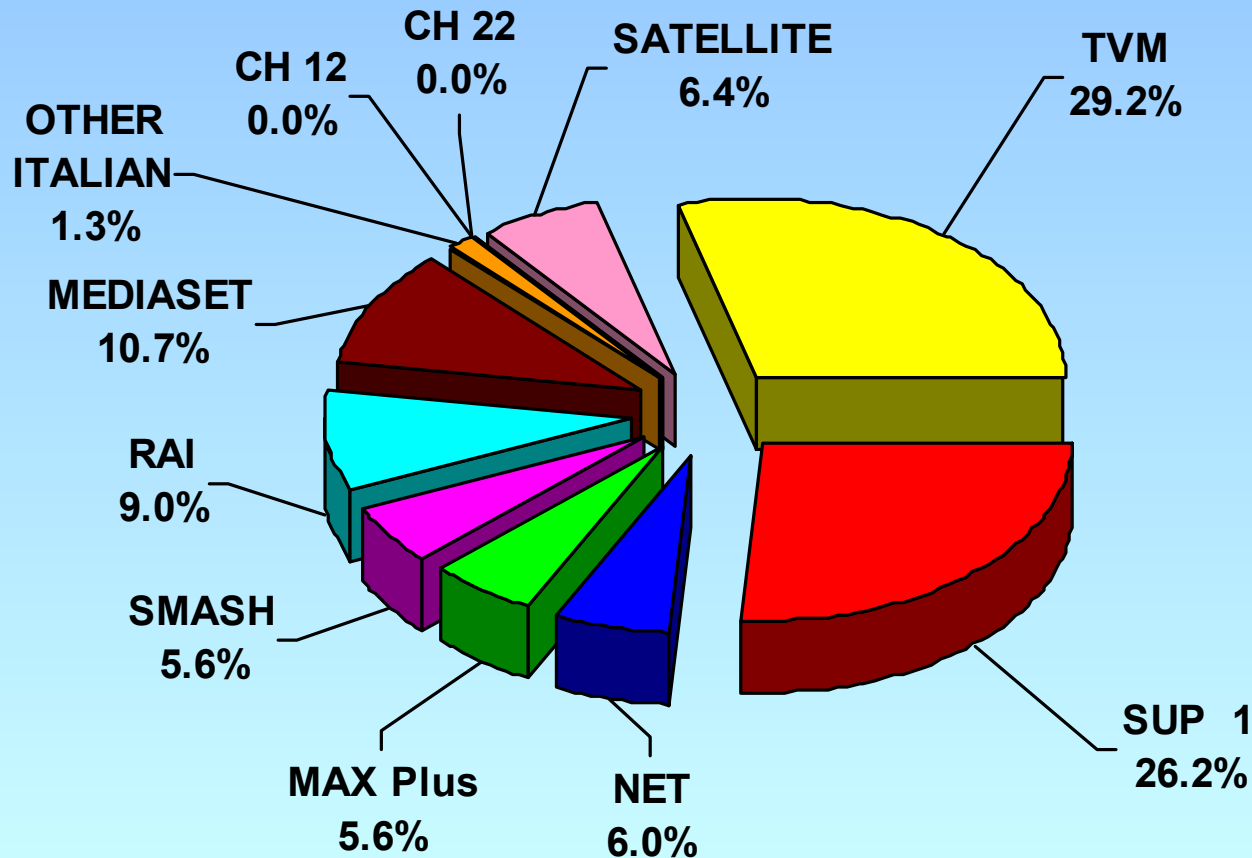
TV Viewing: Sunday

Last Quarter 2000 – 2001



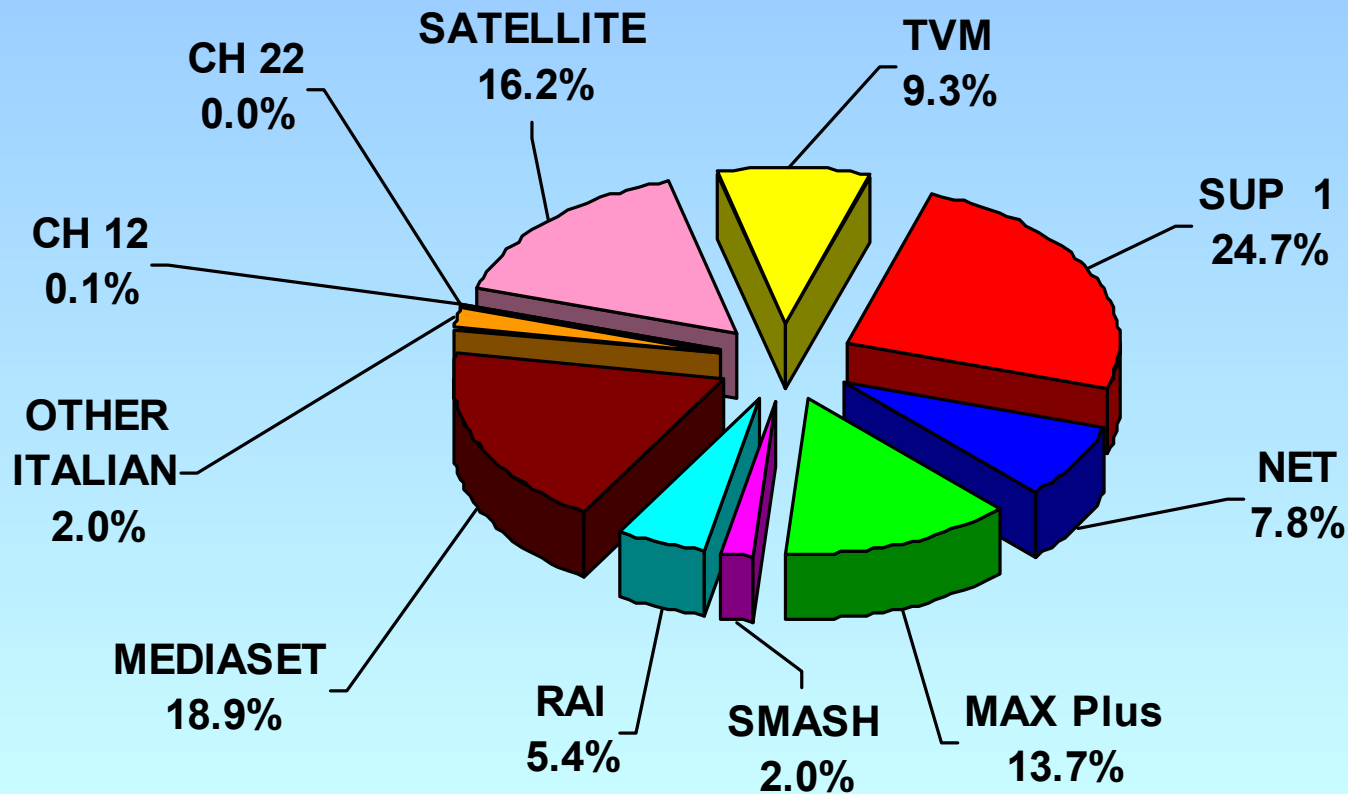
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



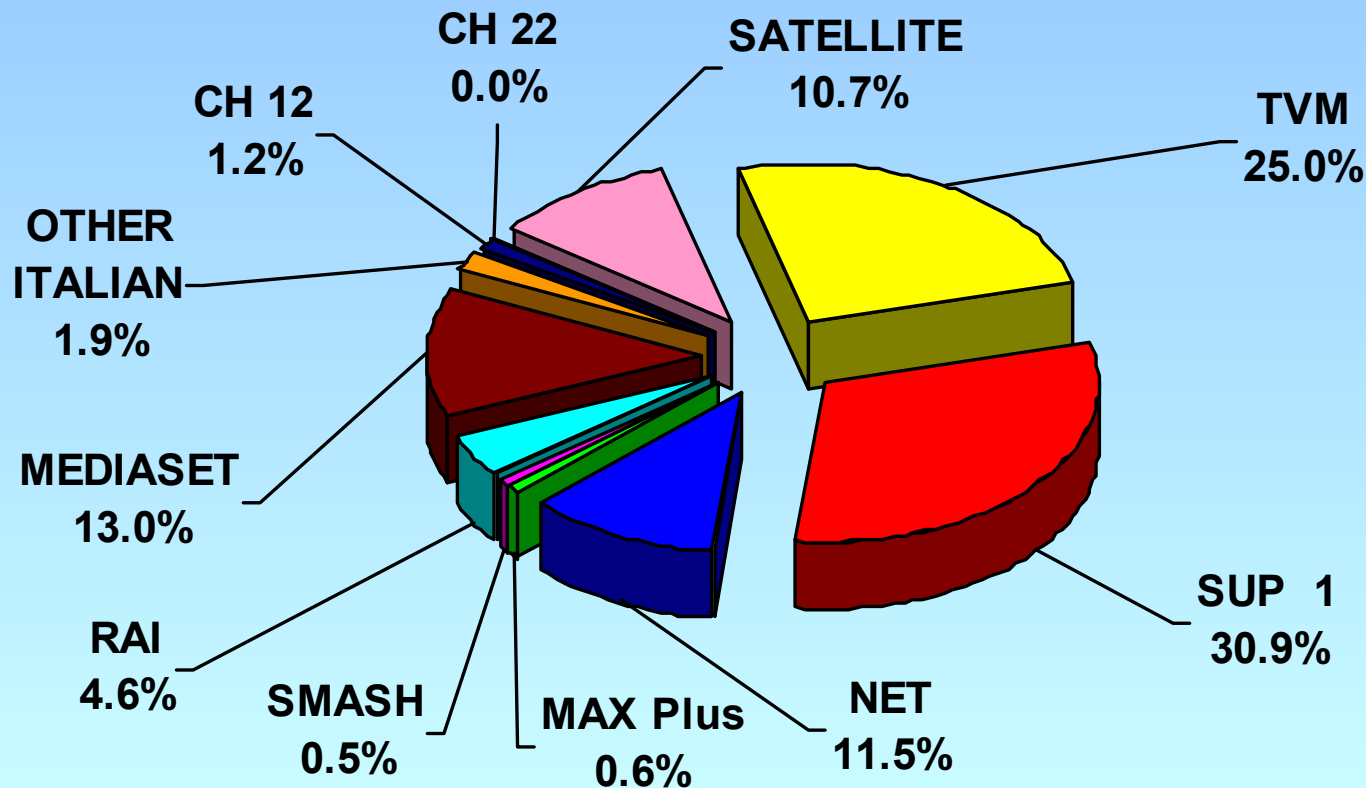
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



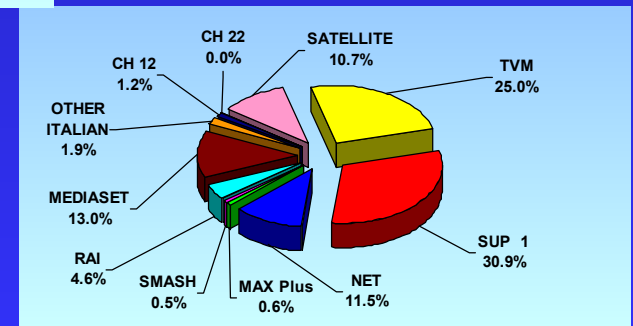
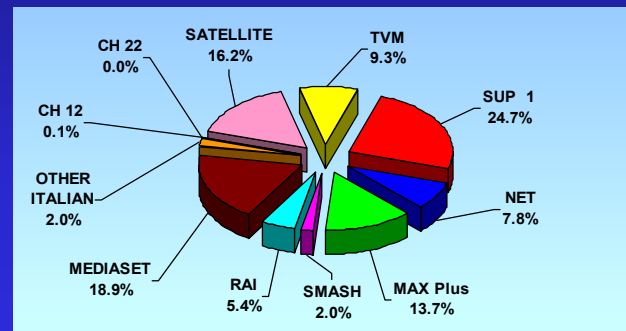
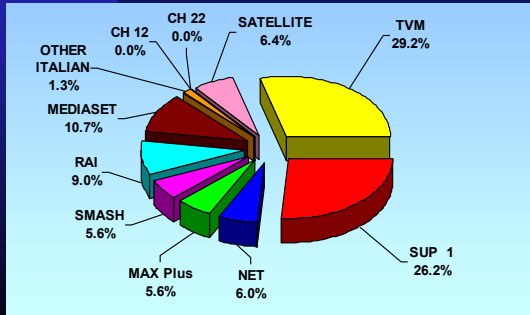
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



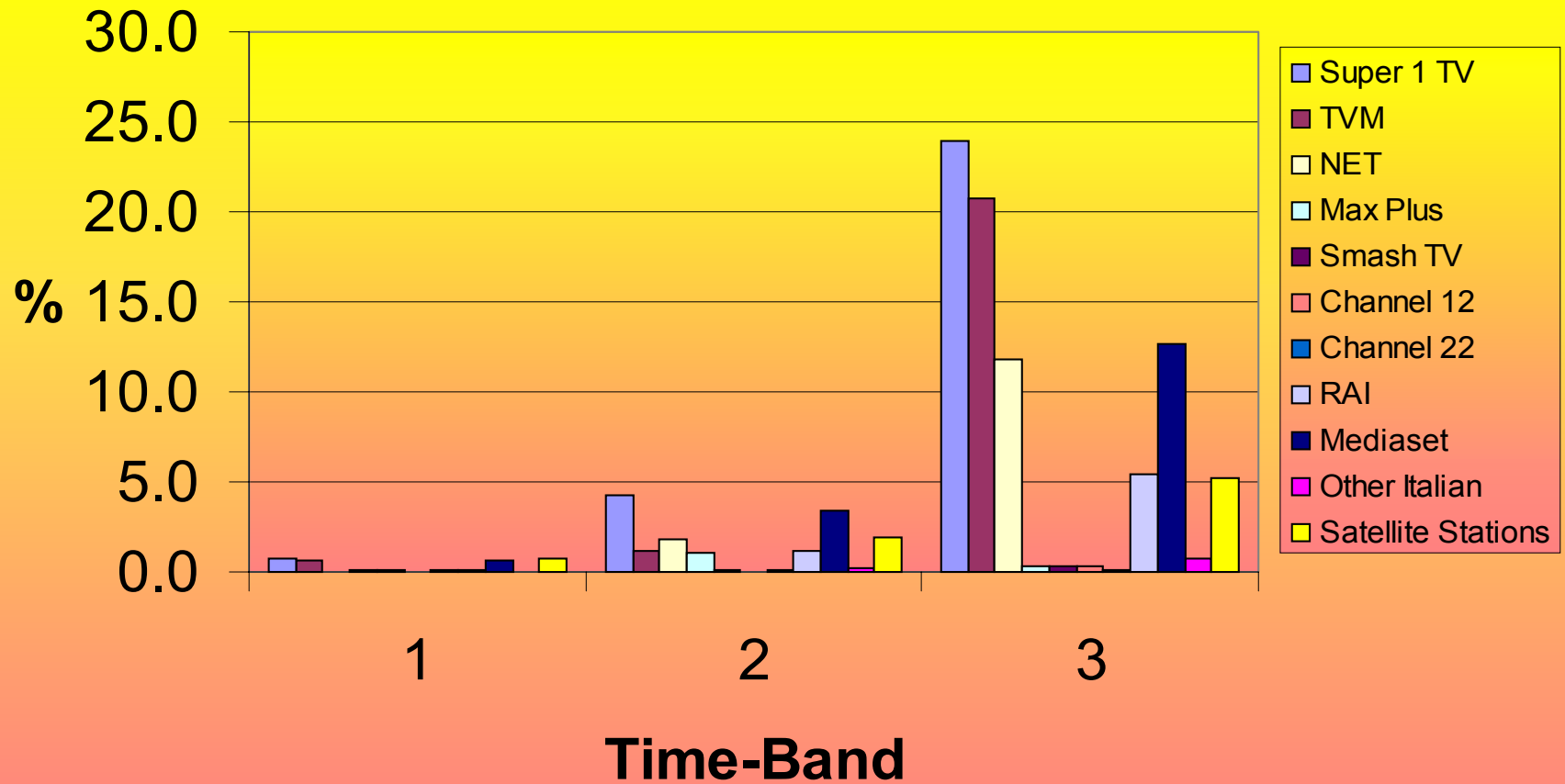
Daily Average TV Audience Levels

Time-Band Comparison



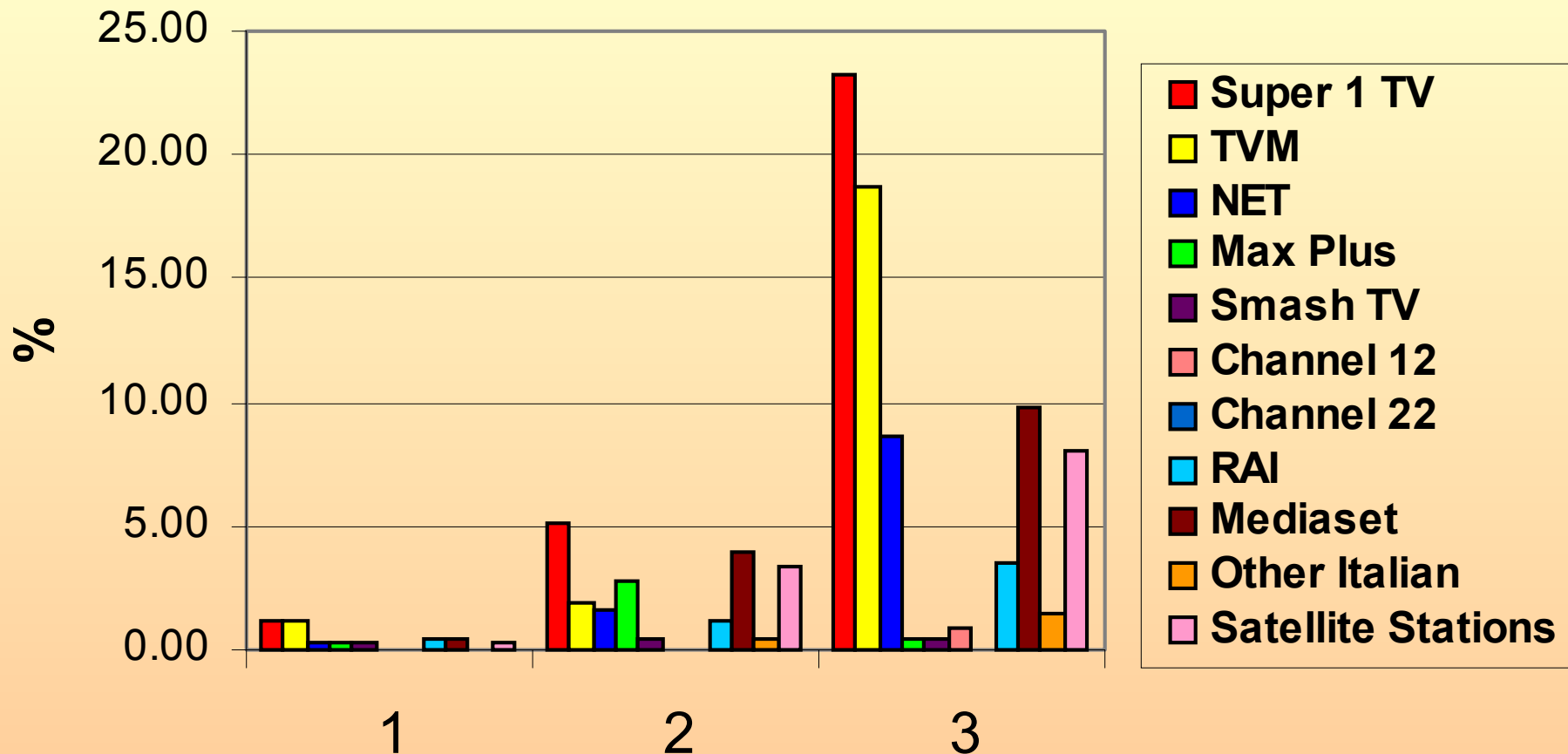
Daily Average TV Audience Levels

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



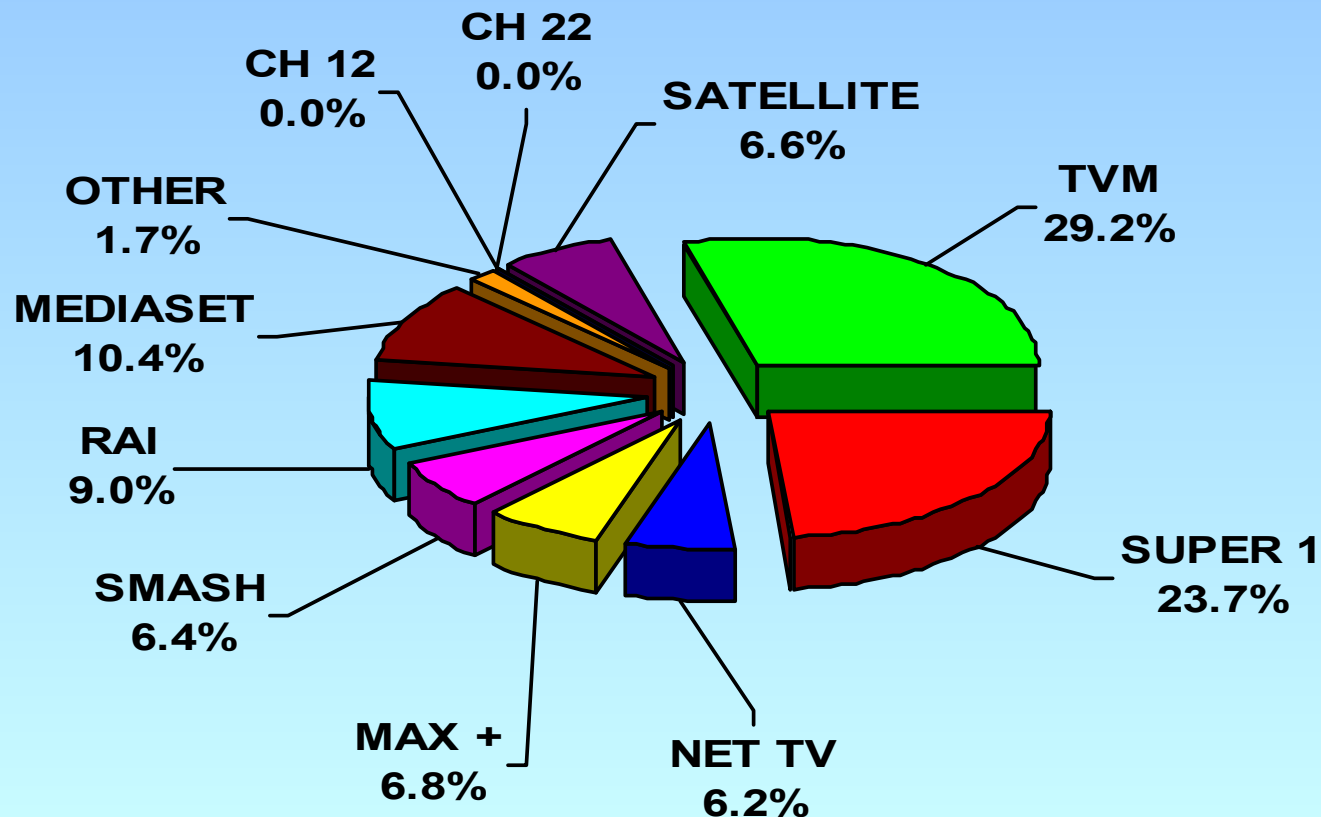
Daily Average TV Audience Levels

*Time-Band Comparison in terms of Absolute Audience Size
Last Quarter 2001*



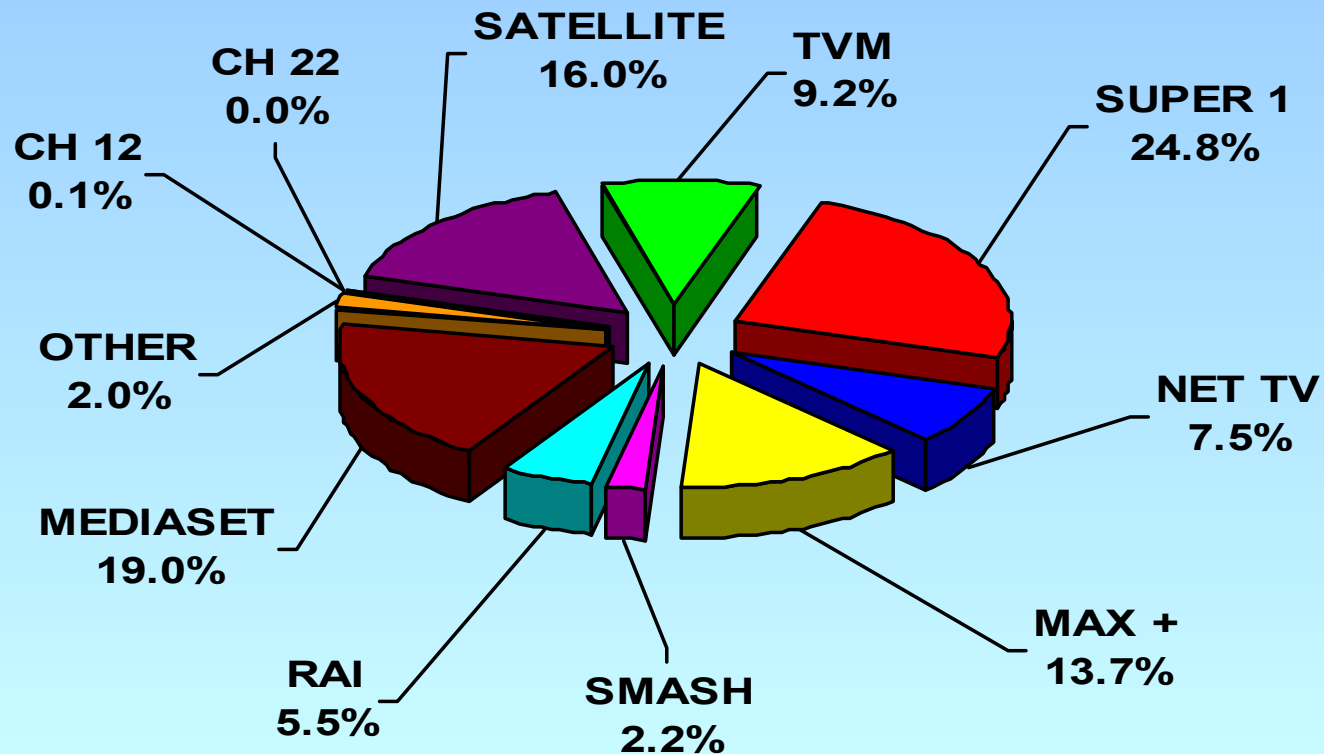
Daily Average TV Audience Levels

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



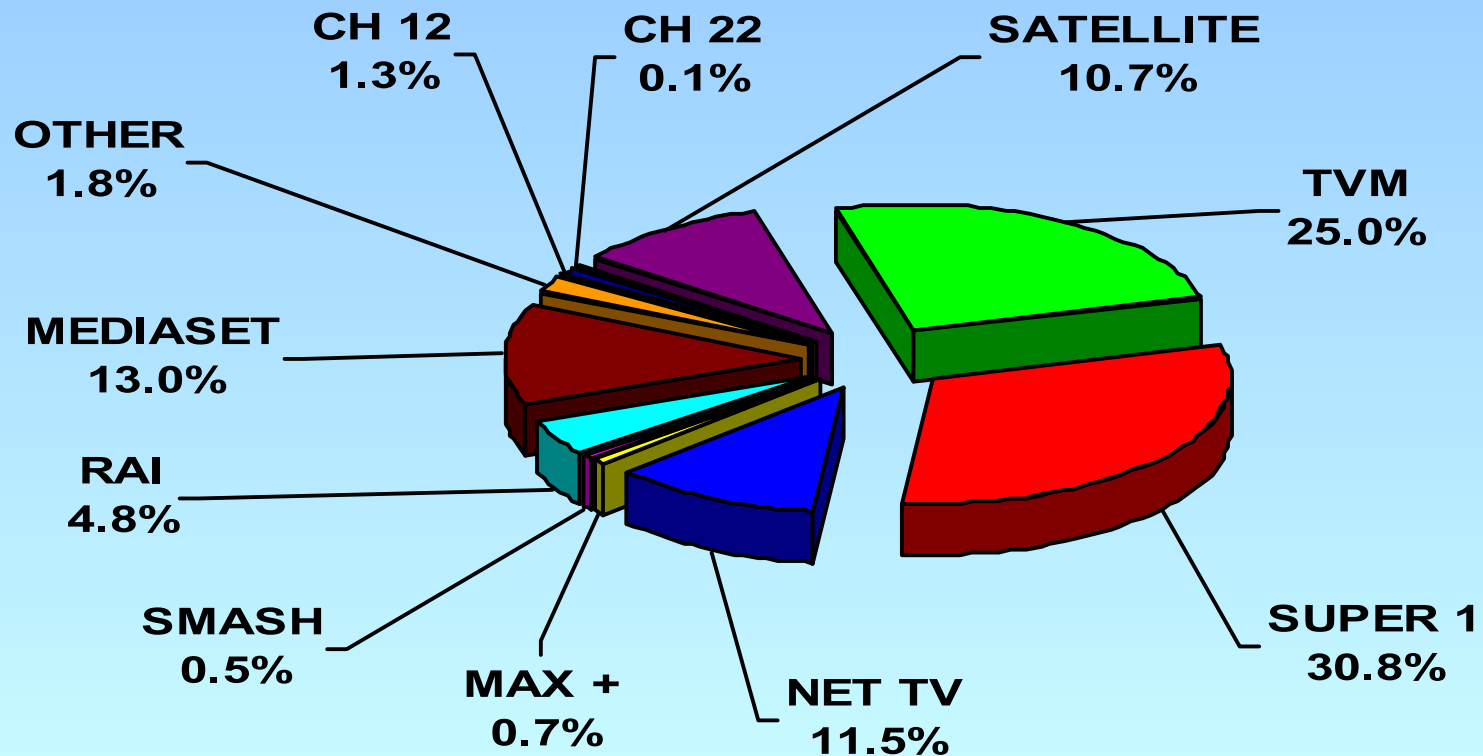
Daily Average TV Audience Levels

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
	%	%	%
Super 1 TV	26.2	24.7	30.9
TVM	29.2	9.3	25.0
NET	6.0	7.8	11.5
Max Plus	5.6	13.7	0.6
Smash TV	5.6	2.0	0.5
Channel 12	-	0.1	1.2
Channel 22	-	-	-
RAI	9.0	5.4	4.6
Mediaset	10.7	18.9	13.0
Other Italian	1.3	2.0	1.9
Satellite Stations	6.4	16.2	10.7

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	29.2	9.2	25.0
Super 1 TV	23.7	24.8	30.8
NET	6.2	7.5	11.5
Max Plus	6.8	13.7	0.7
Smash TV	6.4	2.2	0.5
Channel 12	-	0.1	1.3
Channel 22	-	-	0.1
RAI	9.0	5.5	4.8
Mediaset	10.4	19.0	13.0
Other Italian	1.7	2.0	1.8
Satellite Stations	6.6	16.0	10.7

Conclusions:

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

Radio Stations: Relative Strengths

6.00 a.m. - Midnight

- Super 1 – 25.1%
- RTK – 17.9%
- Radju Malta – 12.5%
- Radio 101 – 11.3%
- Radio Calypso – 8.6%
- Bay Radio – 8.0%
- Capital – 6.4%
- Radju Parlament – 4.5%
- Smash – 2.8%
- Island Sound – 2.2%
- Radju MAS – 1.9%
- FM Bronja - 0.4%
- Radju ta' L-Universita' - 0.3%

Trends in Radio Audience Share

6.00 am – Midnight

Last Quarter 2000 – 2001

■ Increases

- Radio Malta (+4.7%)
- Radju Parlament (+2.9)
- Radio Calypso (+2.2%)
- Capital Radio (+2.1%)
- RTK (+1.9%) Radju
- FM Bronja (+0.2%)
- University Radio (+0.1%)
- ◆ Island Sound (+0.1%)

■ Decreases

- Bay Radio (-5.0%)
- Super 1 Radio (-3.4%)
- Radio 101 (-2.7%)
- MAS (-2.1%)
- Smash Radio (-1.3%)

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 Audience Share

Local Stations

Last Quarter 2000 – 2001

	BAND 1	BAND 2	BAND 3
Super 1 TV	+4.1	-2.9	+1.6
TVM	+9.7	+1.4	-0.4
NET	+6.0	-4.2	-3.0
Max Plus	+1.7	+6.7	+0.2
Smash TV	+1.7	+1.6	+0.1

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
- ❑ Super 1 is best station in Time-Band 2 & 3
- ❑ NET TV has its best audience in Time Band 3
- ❑ 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

Thank you for your attention!

BA Audience Audit October 2001