

TV & Radio Audiences in Malta

Broadcasting Authority

4th 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 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 - 2002 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	76.3	77.6	75.1
Do Not Listen to the Radio	23.7	22.4	24.9

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	764	380	384
	%	%	%
Varies Considerably	0.4	0.3	0.5
One Hour	34.2	38.4	29.9
Two Hours	18.5	20.8	16.1
Three Hours	13.1	12.1	14.1
Four to Nine Hours	29.4	24.3	34.6
Ten Hours and more	4.4	4.1	4.8

Where is Radio Listened to

	Total	Male	Female
N=	764	380	384
	%	%	%
NA	0.4	0.3	1.4
At home	73.3	60.5	85.9
At work	17.1	27.6	6.8
In the car	38.5	55.0	22.1

Who watches TV

	Total	490	511
N=	1001	490	511
	%	%	%
Watch TV	98.0	98.0	98.0
Do Not watch TV	2.0	2.0	2.0

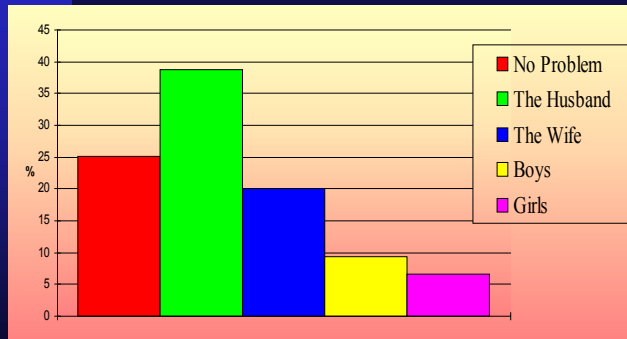
Average No. of Hours TV is watched

	Total	Male	Female
N=	981	480	501
	%	%	%
Varies Considerably	0.1	-	0.2
One Hour	15.5	18.5	12.6
Two Hours	32.2	35.0	29.5
Three Hours	25.1	24.4	29.7
More than three Hours	27.1	22.1	28.0

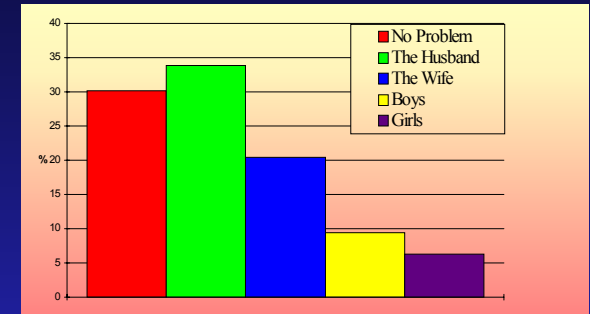
Where TV is Watched

	Total	Male	Female
N=	981	480	501
	%	%	%
Sitting Room	52.7	54.2	51.3
Dining Room	3.0	4.0	2.0
Kitchen	20.0	15.2	24.6
Bedroom	23.0	24.4	21.8
Another Place	1.3	2.3	0.4

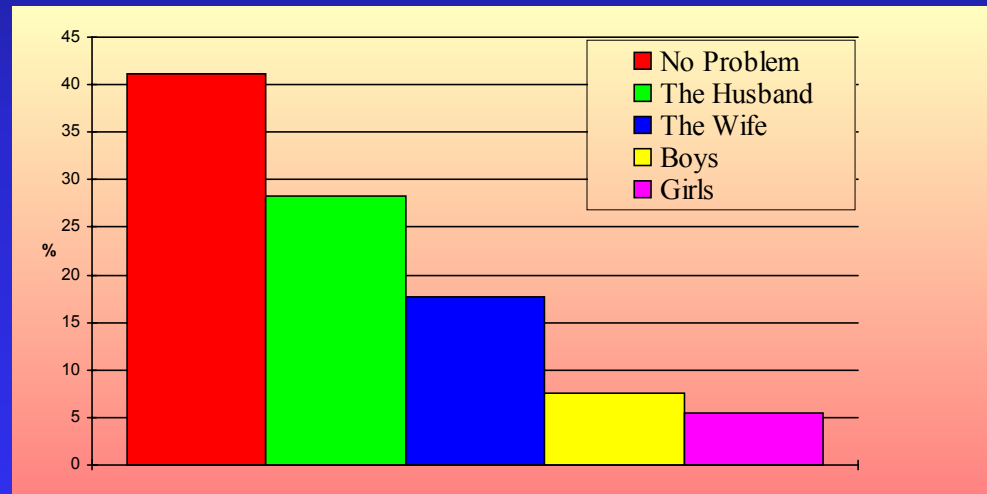
Who decides on Choice of Channel (2001 - 2002)



4th Quarter 2001



2nd Quarter 2002



4th Quarter 2002

Mode of Receiving TV Signal

Base= All

	Total	AB	C1	C2	DE
N=	1001	184	315	217	285
	%	%	%	%	%
Roof Antenna	32.7	28.3	27.3	37.8	37.5
Cable	67.6	74.5	71.4	60.8	64.2
Satellite	15.3	23.4	17.1	12.4	10.2

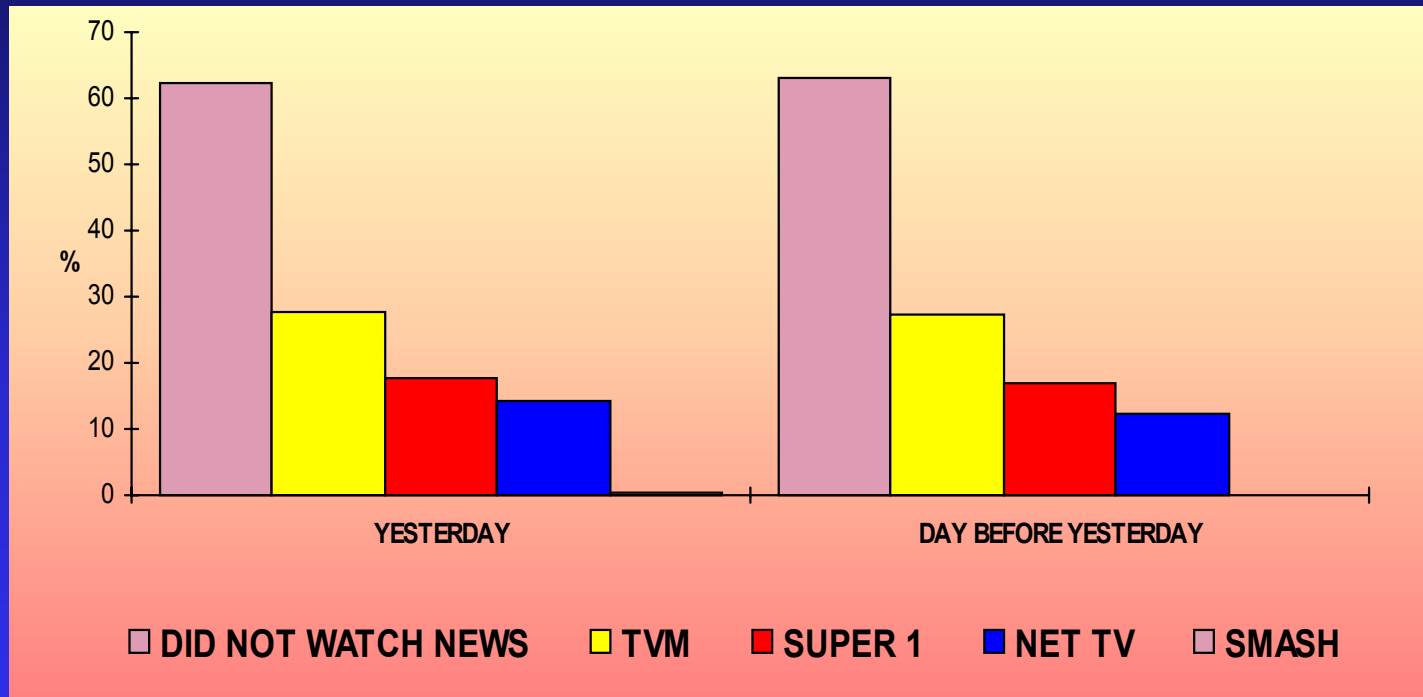
Preferred Source for Local News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	2.5	2.4	2.5
Radio	10.2	10.6	9.8
TV	77.1	75.9	78.3
Newspaper	7.6	9.0	6.3
From Other Persons	2.6	2.0	3.1

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	3.2	3.5	2.9
Radio	9.1	8.4	9.8
TV	81.9	82.2	81.6
Newspaper	3.9	4.1	3.7
From Other Persons	1.9	1.8	2.0

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	82.1
Local News	74.5
Foreign News	70.9
Discussions on Personal Problems	47.1
Current Affairs	38.7
Religion	37.6
Health/Beauty/Home/Law	37.4
Culture	29.3
Women's Programmes	29.1
Sports	26.2
Novels/Plays	25.4
Money/Business	13.9
Children	11.0

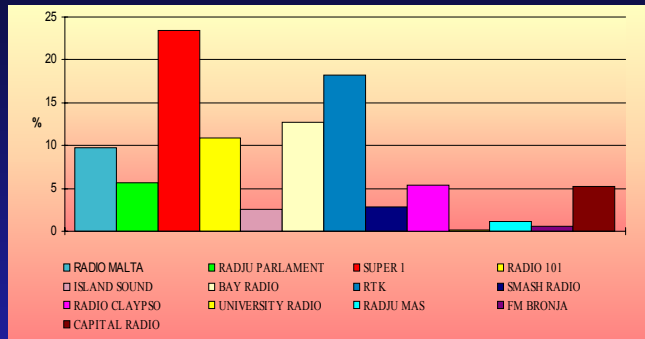
General Preference for Programme Sectors

(TV: 2002 – 2nd Quarter)

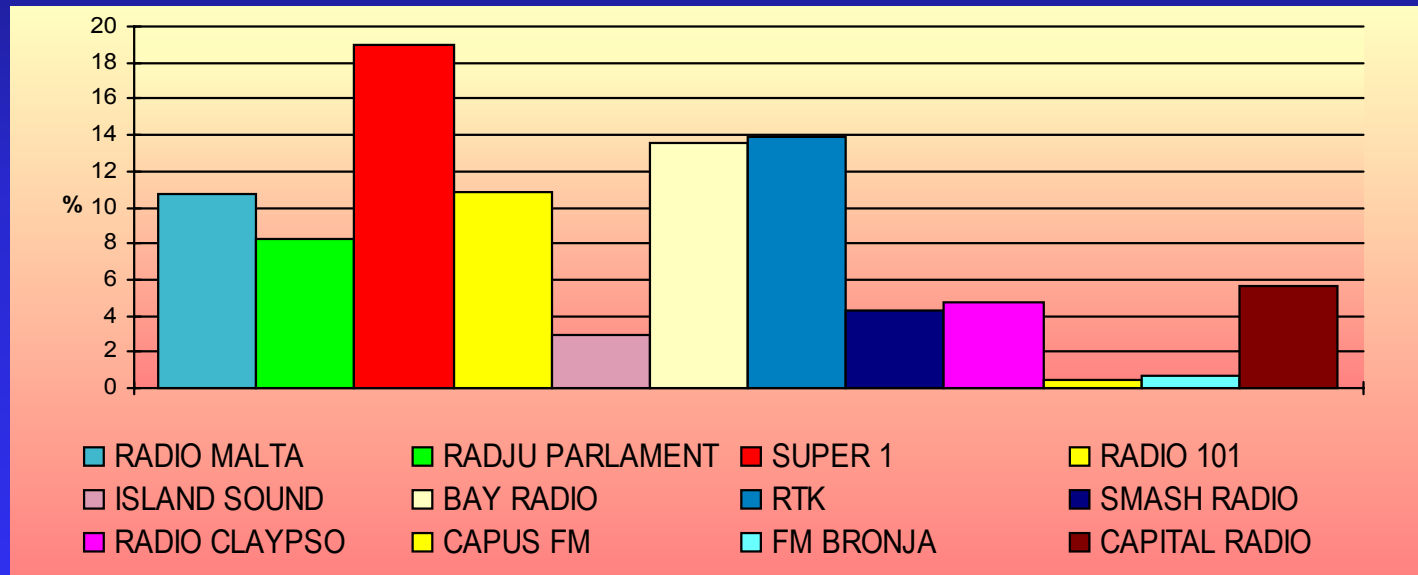
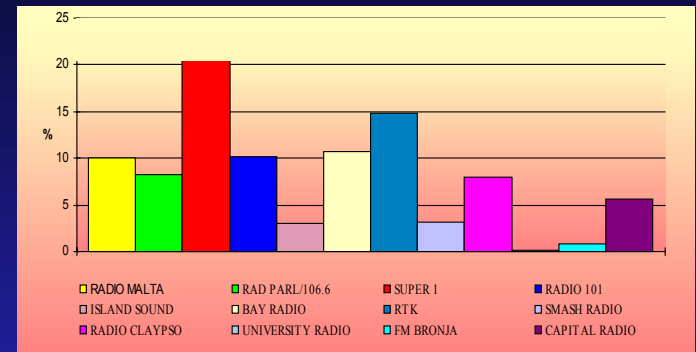
PROGRAMME SECTOR	2002 4th Quarter
Foreign News	91.7
Local News	91.3
Feature Films	72.7
Discussions	69.2
Weather	68.6
Documentaries	59.3
Sports	55.0
Quizzes / Game Shows / Variety Programmes	51.6
Serials/Soap Operas	51.0
Plays	50.5
Women's Programmes	48.4
Current Affairs	42.9
Religion	42.9
Art & Culture	33.0
Children's Programmes	31.9
Music Video-Clips	26.4
Business & Finance	15.4

Overall Performance as 'Best' Radio Station

2001(b)

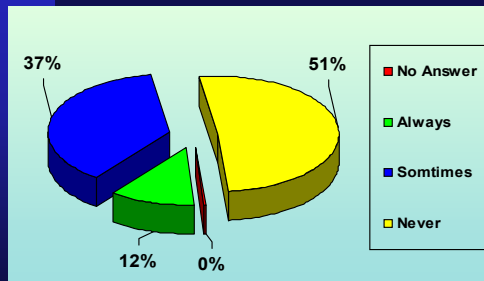


2002(a)

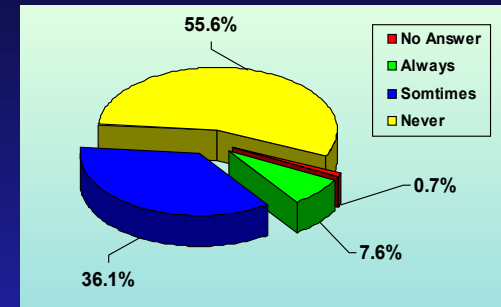


4th Quarter 2002

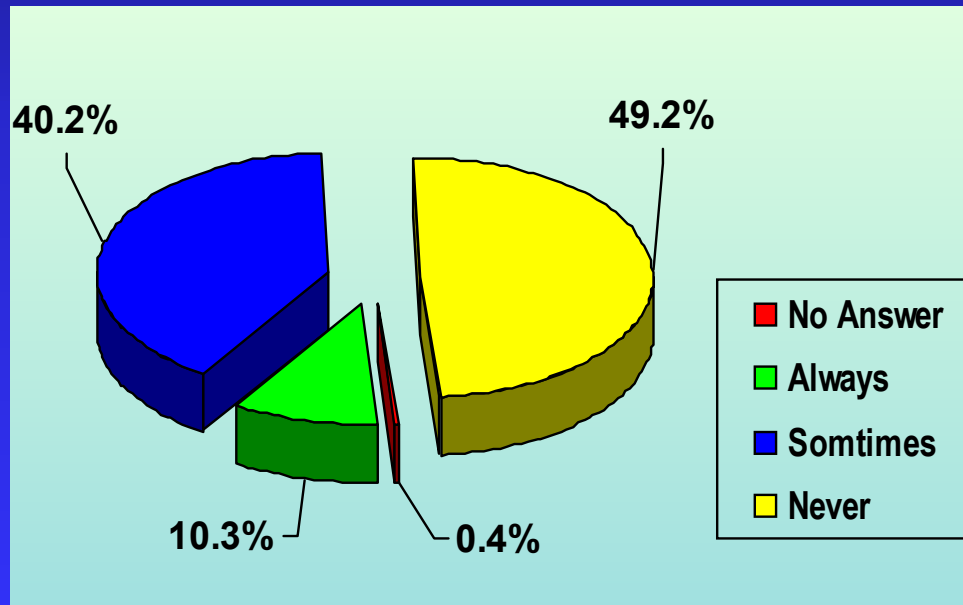
Interest in Political Broadcasts (1999 – 2001)



2001(b)



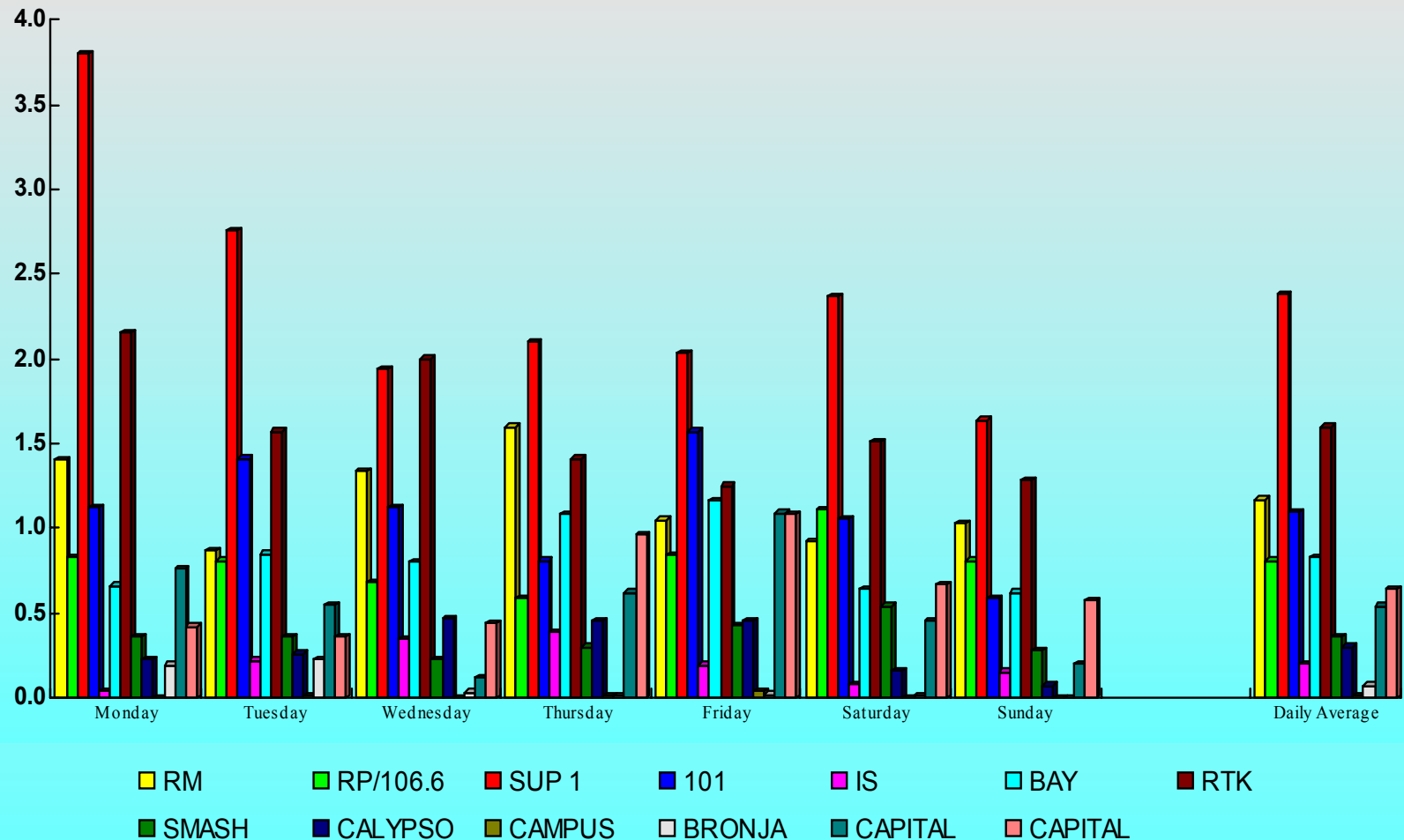
2002(a)



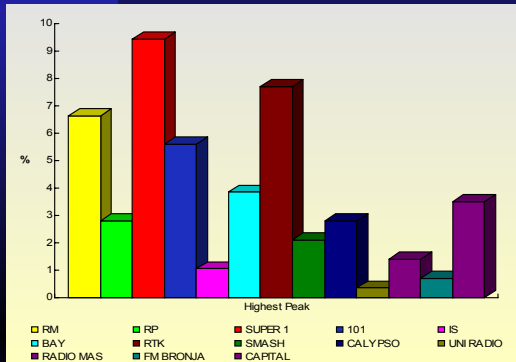
4th Quarter
2002

Daily Radio Average Audience Share

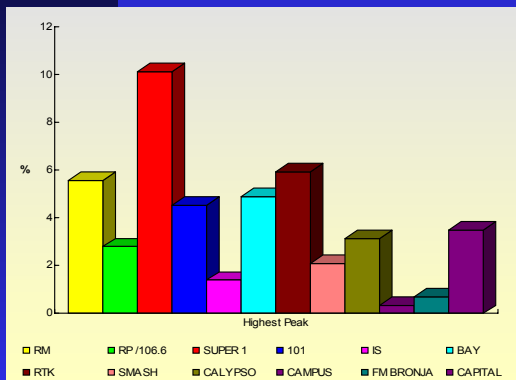
(Basis: Total No. of Transmission Hours)



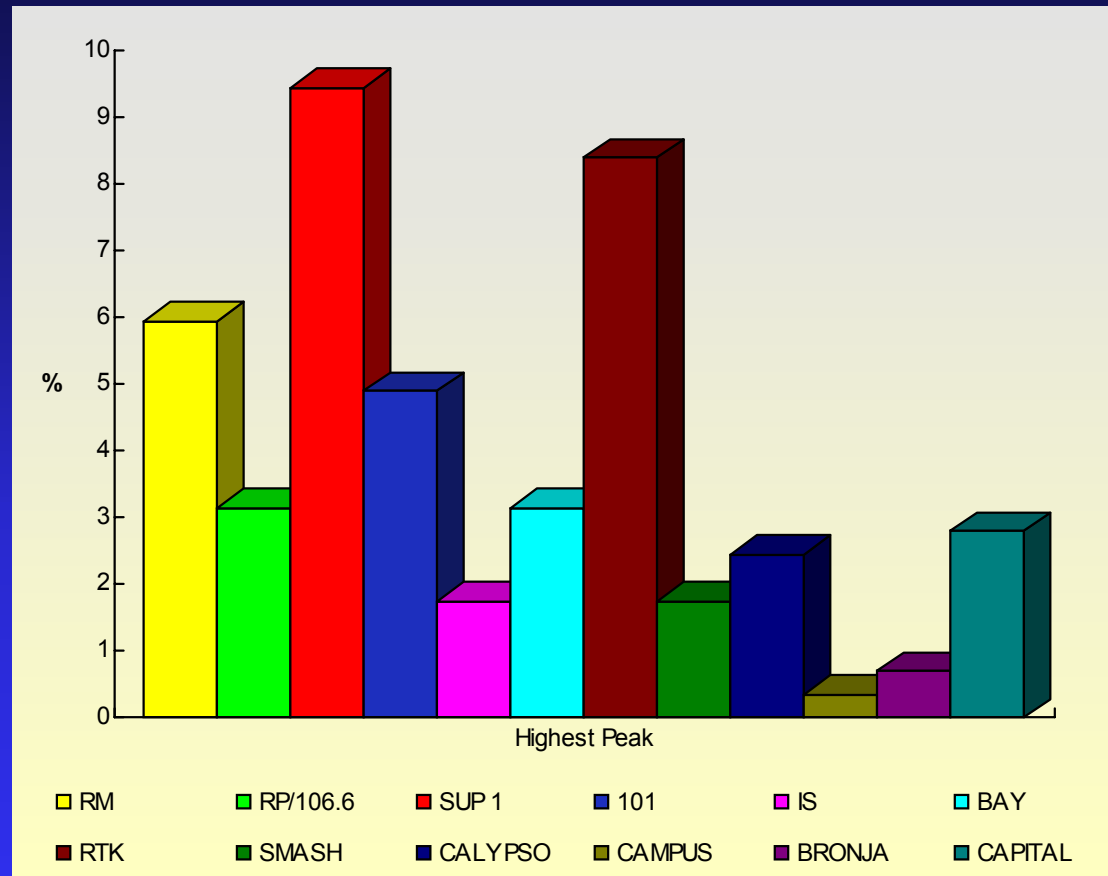
Highest Radio Station Peak Audience Share



2001 (b)

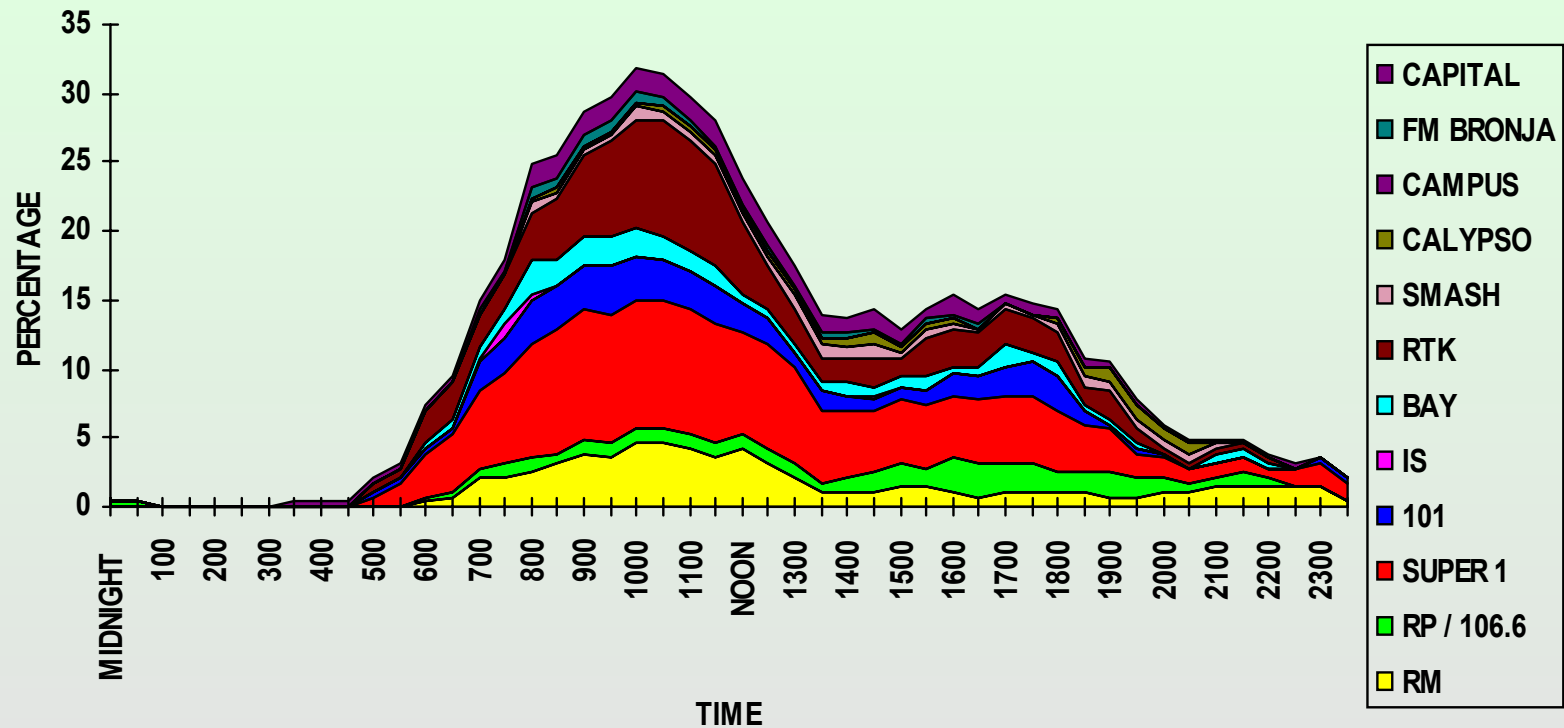


2002 (a)

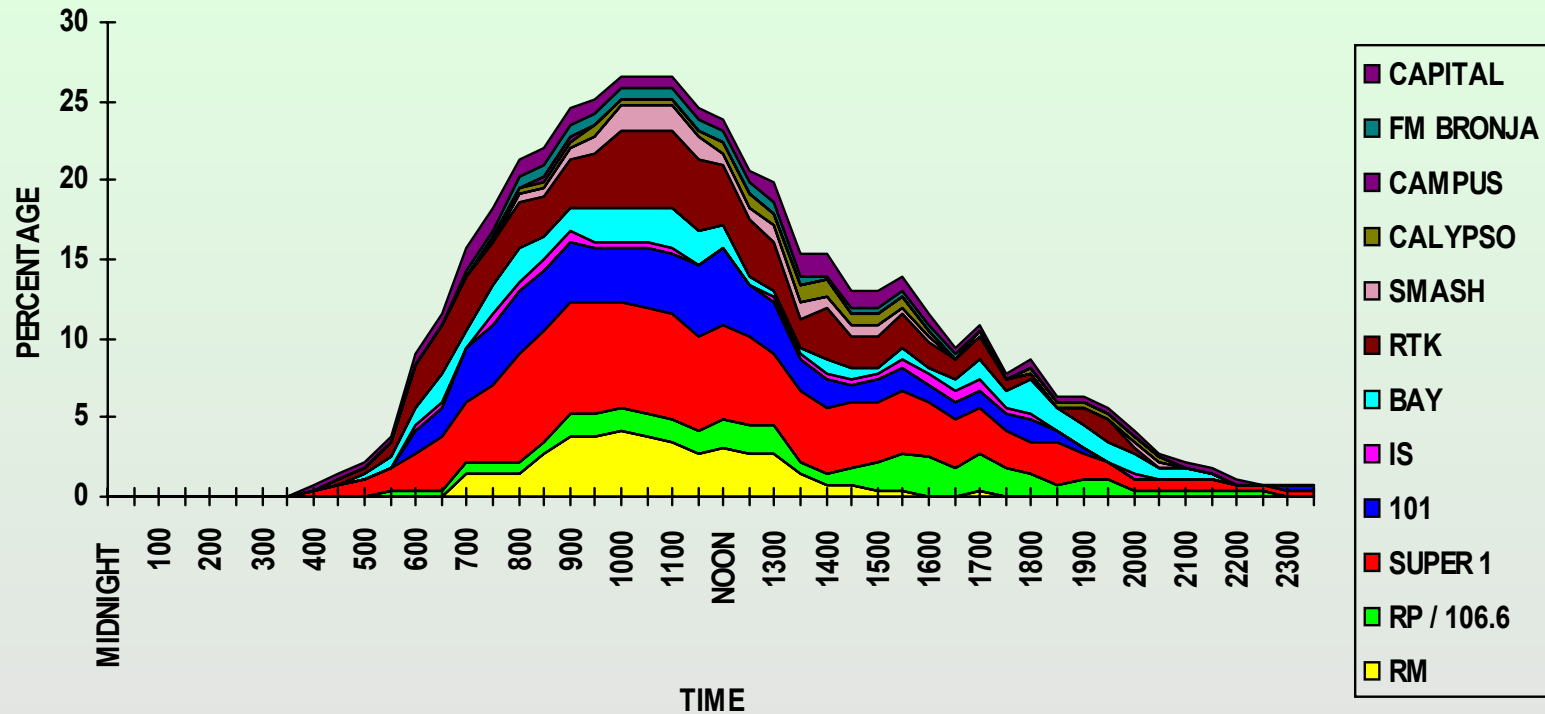


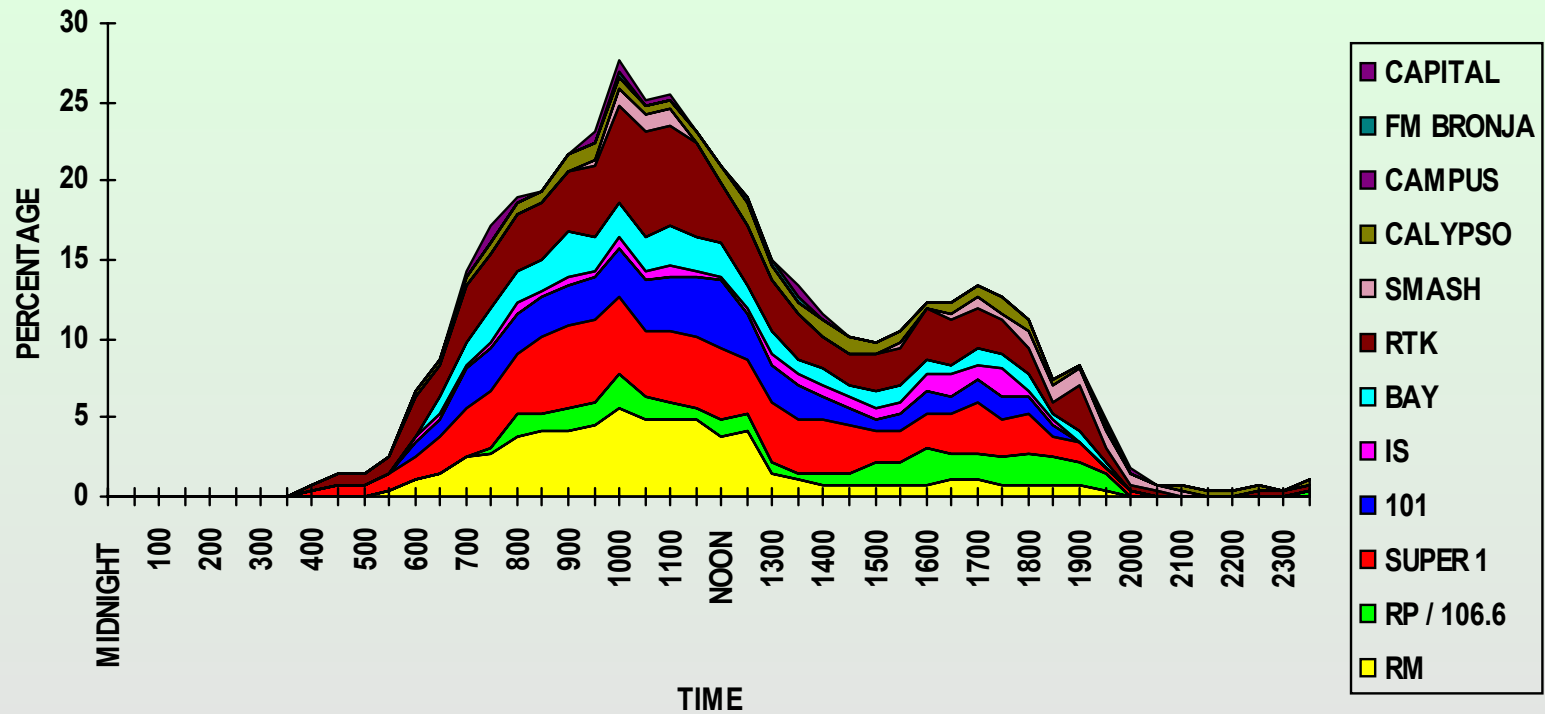
4th Quarter 2002

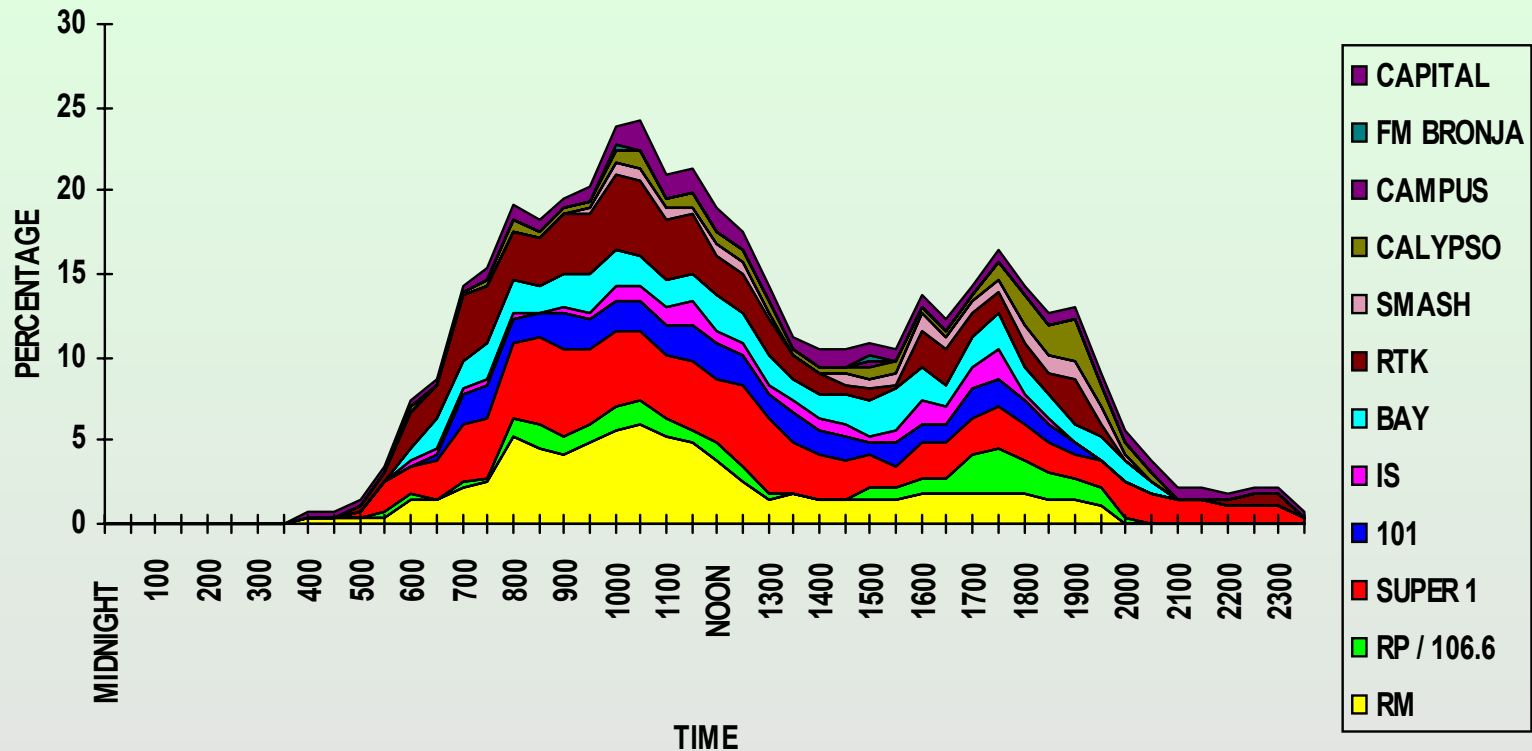
Radio Audiences: Monday



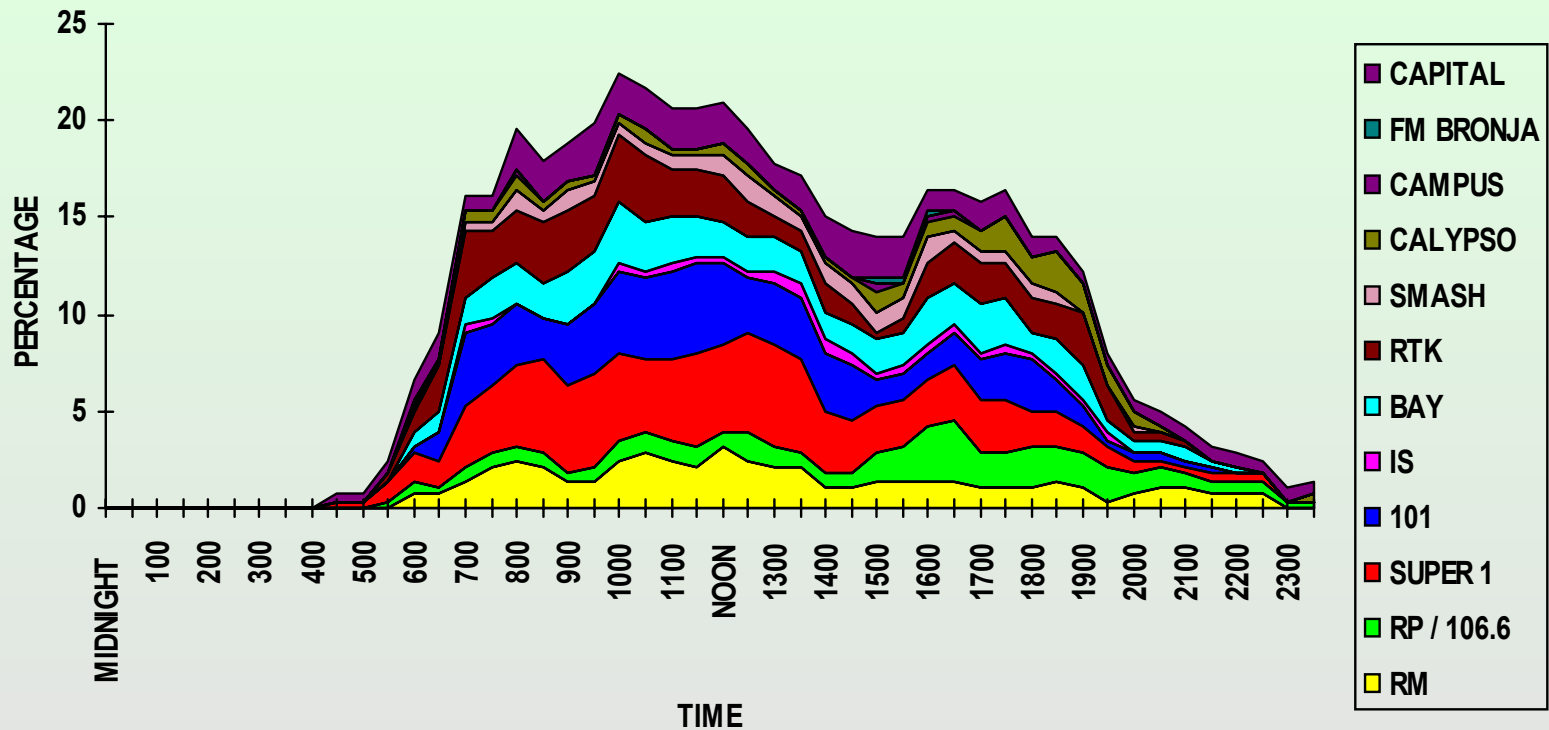
Radio Audiences: Tuesday



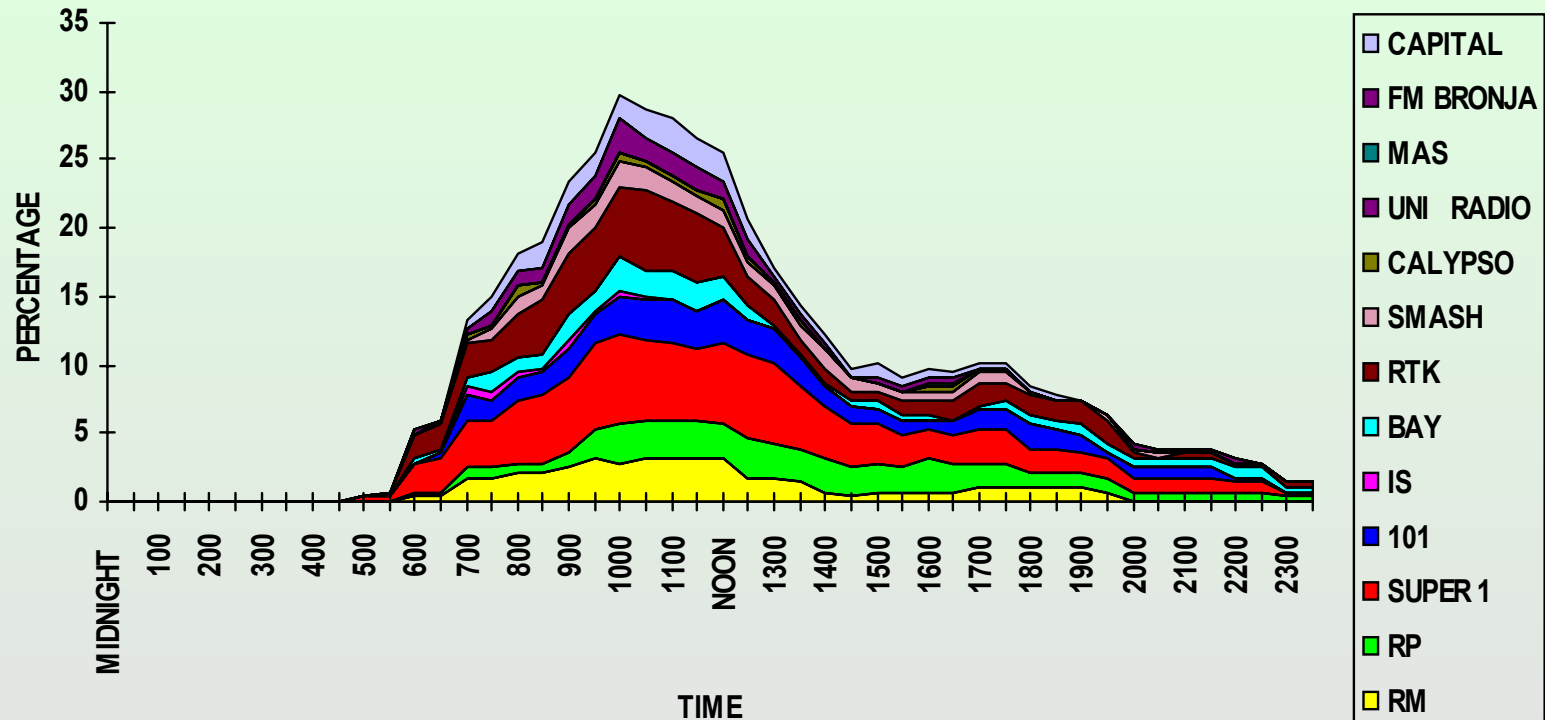


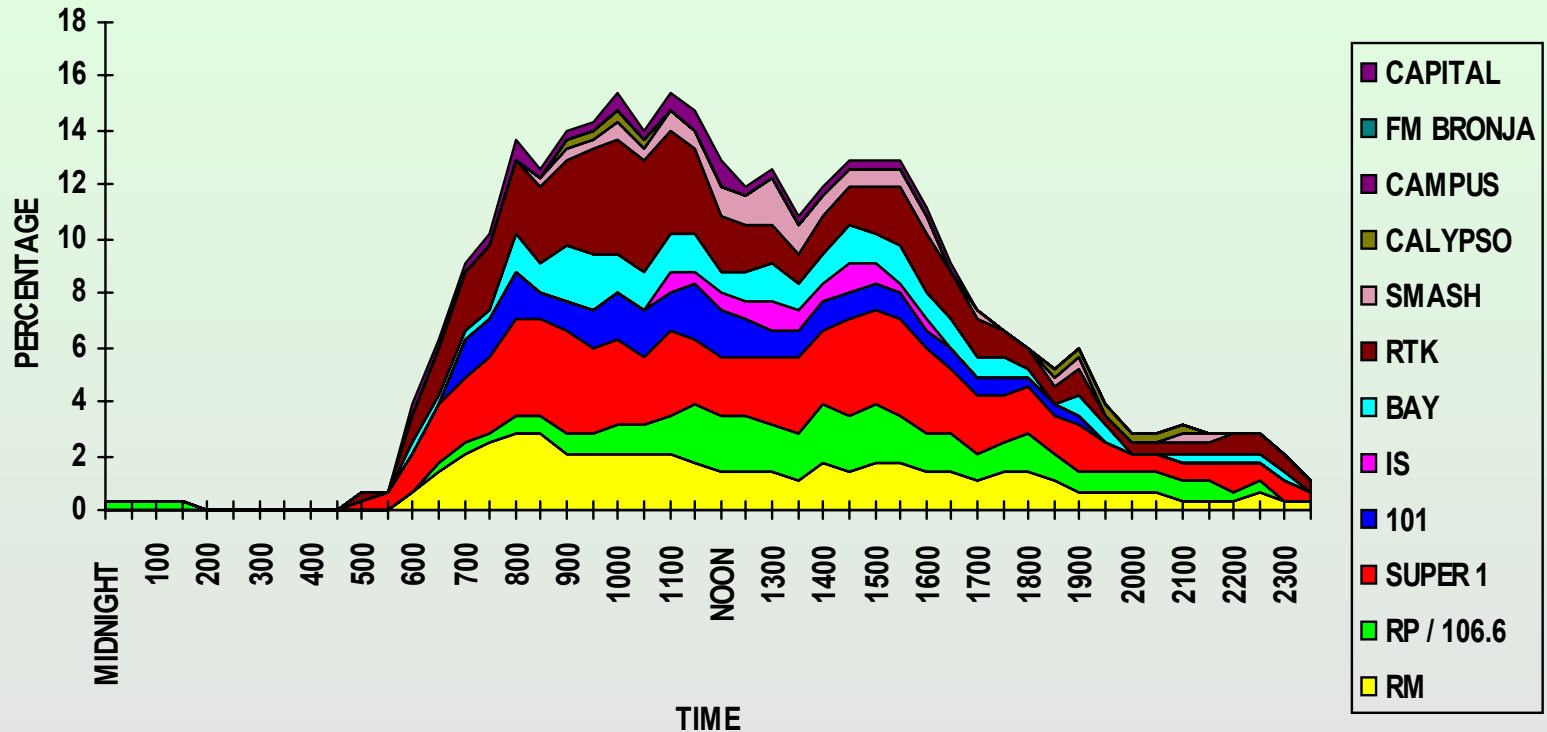


Radio Audiences: Friday



Radio Audiences: Saturday





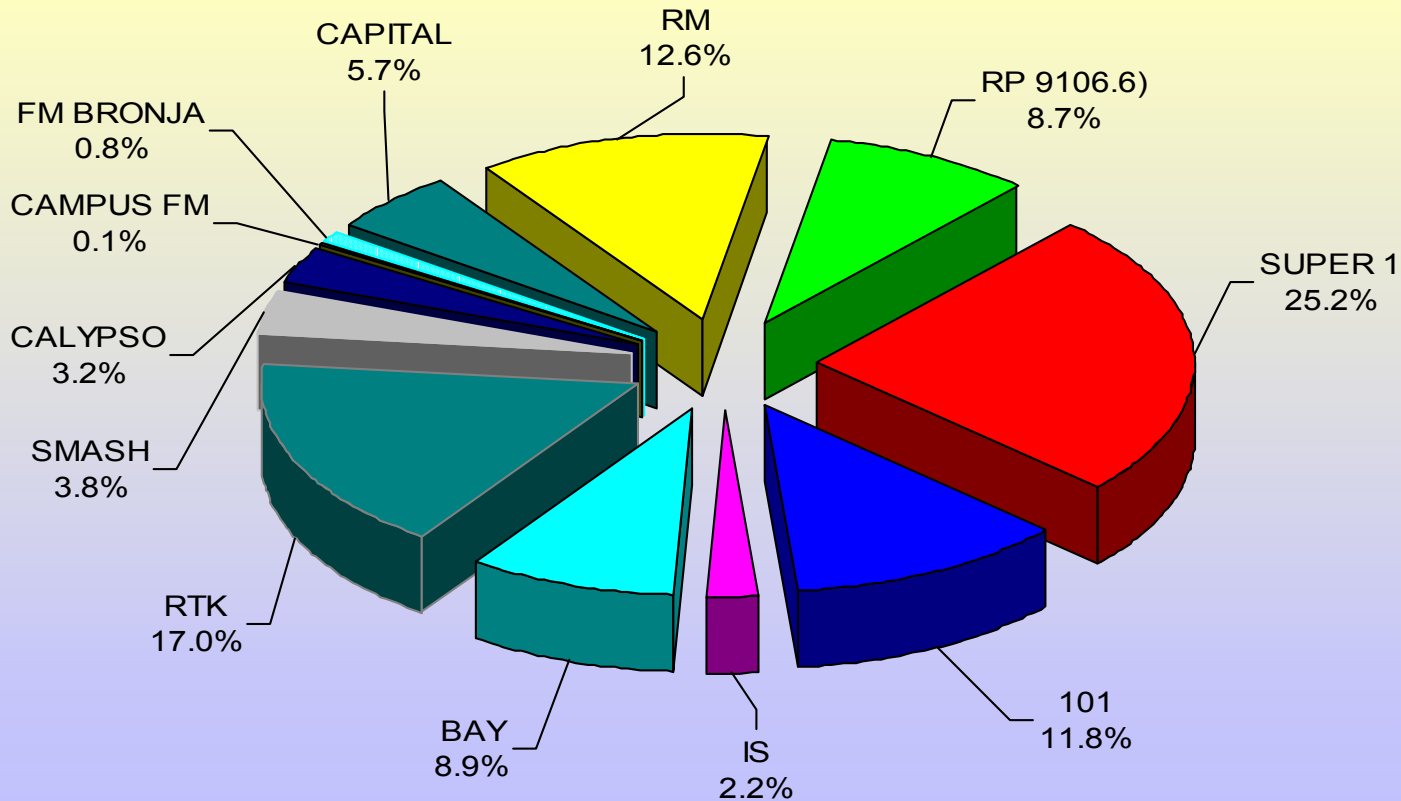
Meaning of %

- ❑ 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.
- ❑ 4th Quarter 2002
 - ❖ Radio:
 - All Available Slots: 1% = 292 persons
 - 6.00 – Midnight: 1% = 386 persons
 - ❖ TV:
 - B1: 1% = 103 persons
 - B2: 1% = 331 persons
 - B3: 1% = 1092 persons

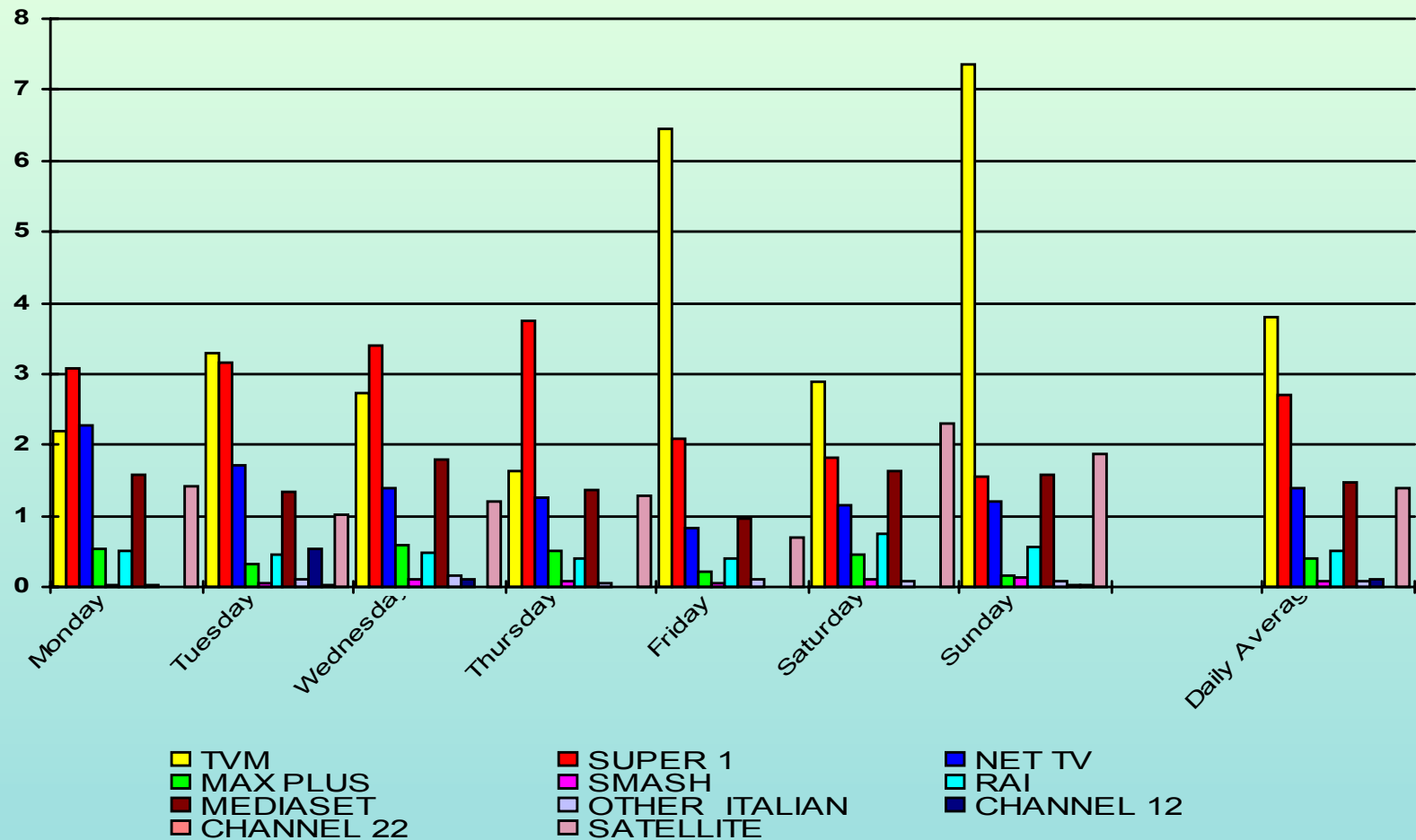
Daily Average Radio Audience Levels:

4th Quarter 2002

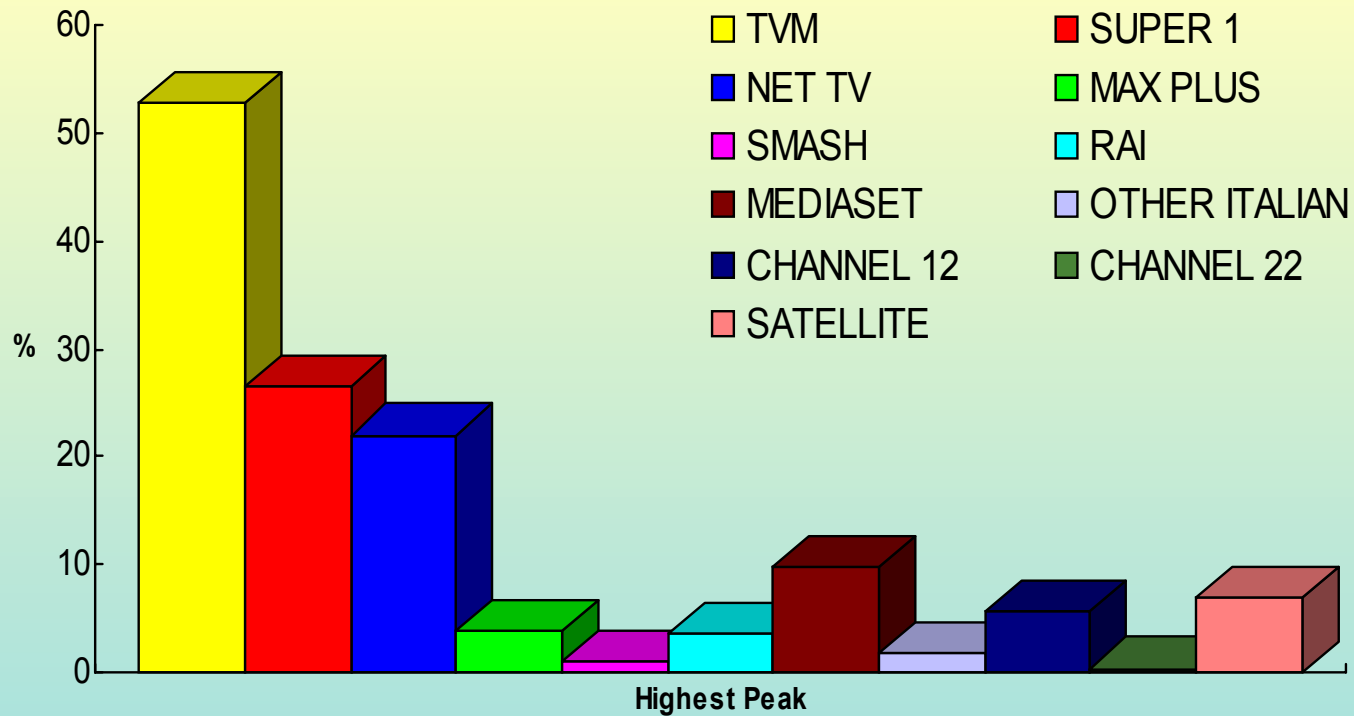
(Basis: 6.00 a.m - Midnight)



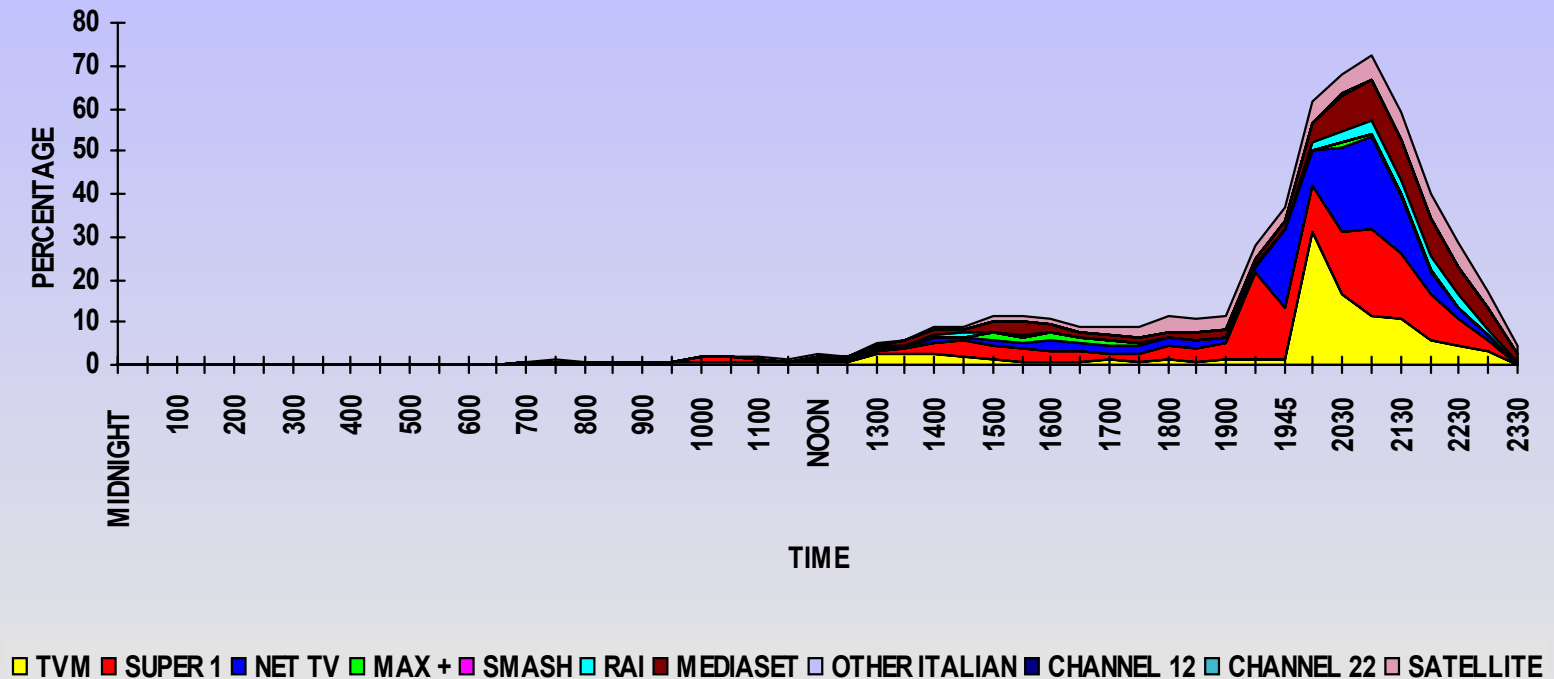
Daily TV Average Audience Share (Basis: Hours of Transmission by Station)

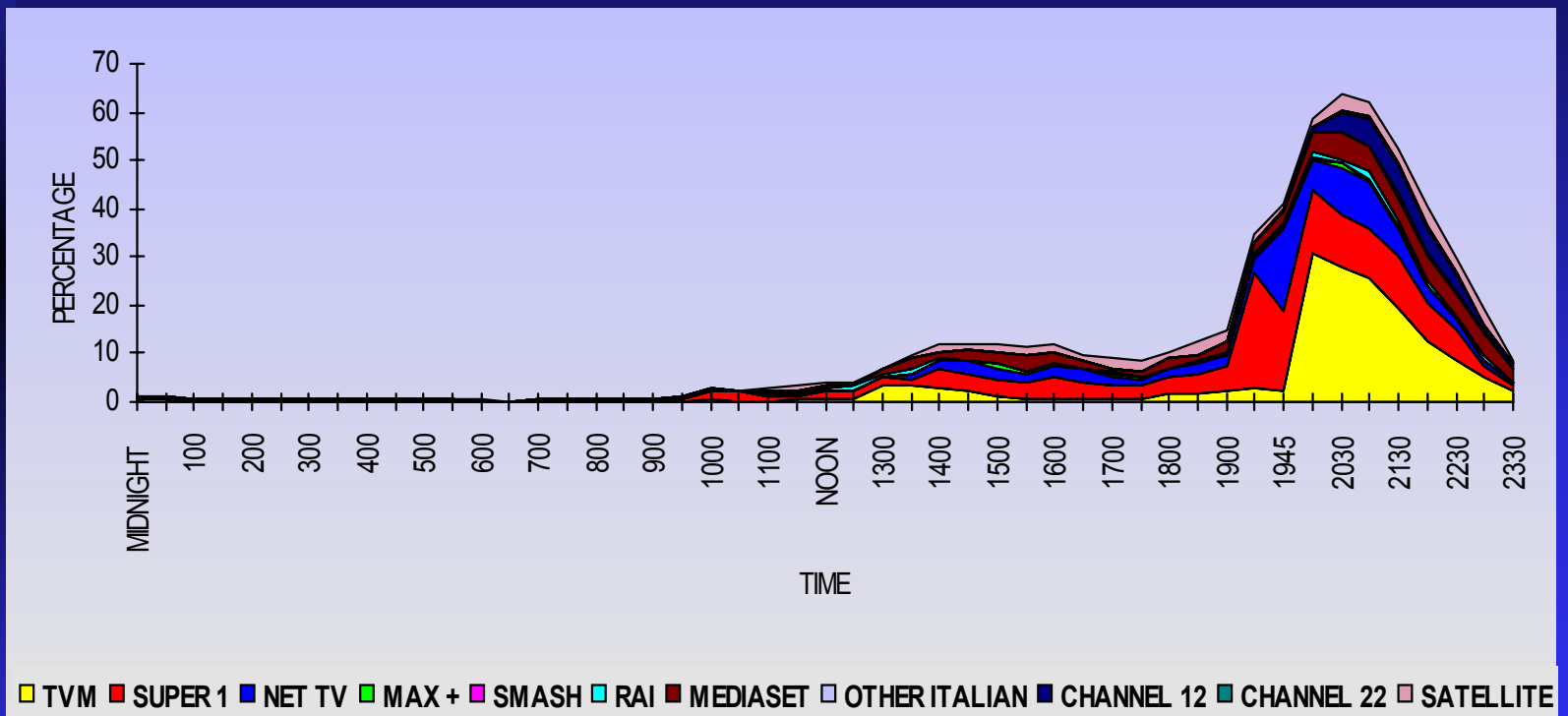


Highest TV Channel Peak Audience Share

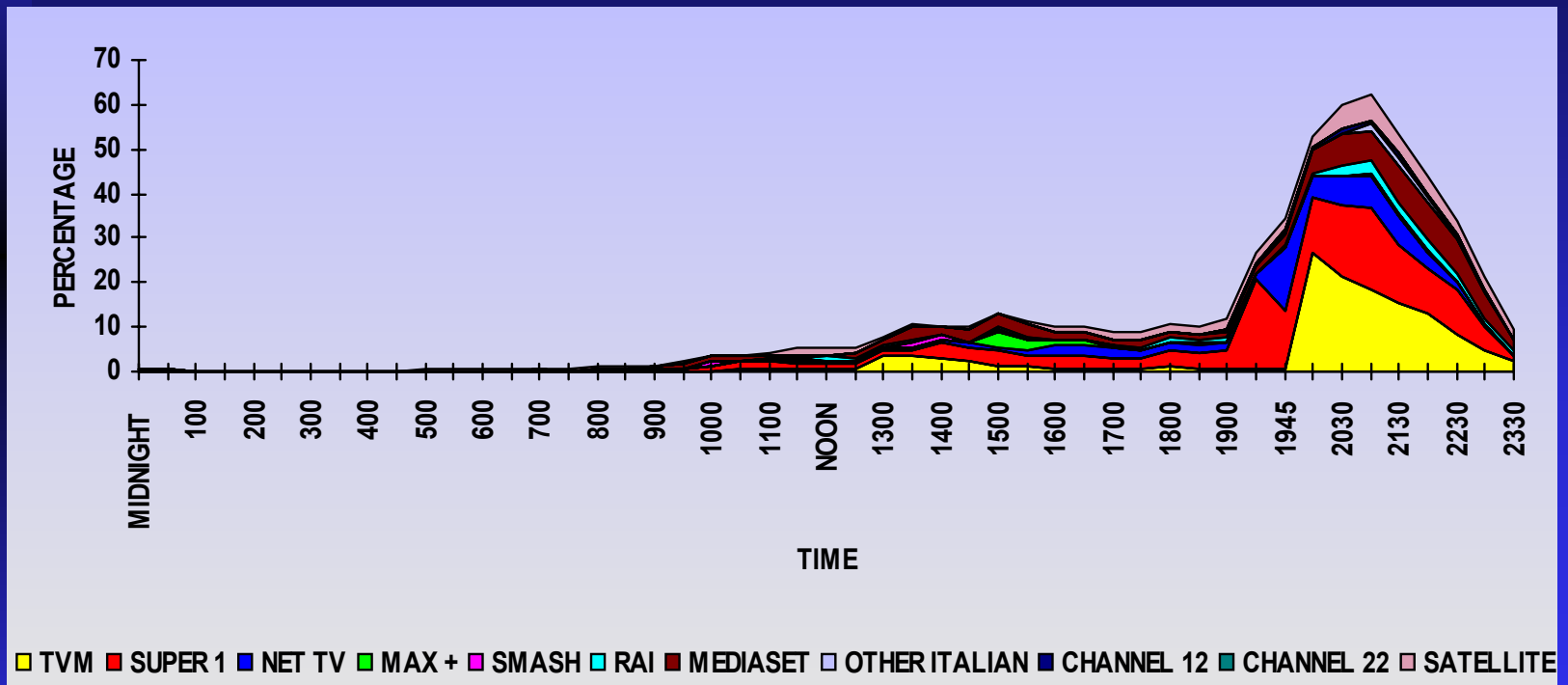


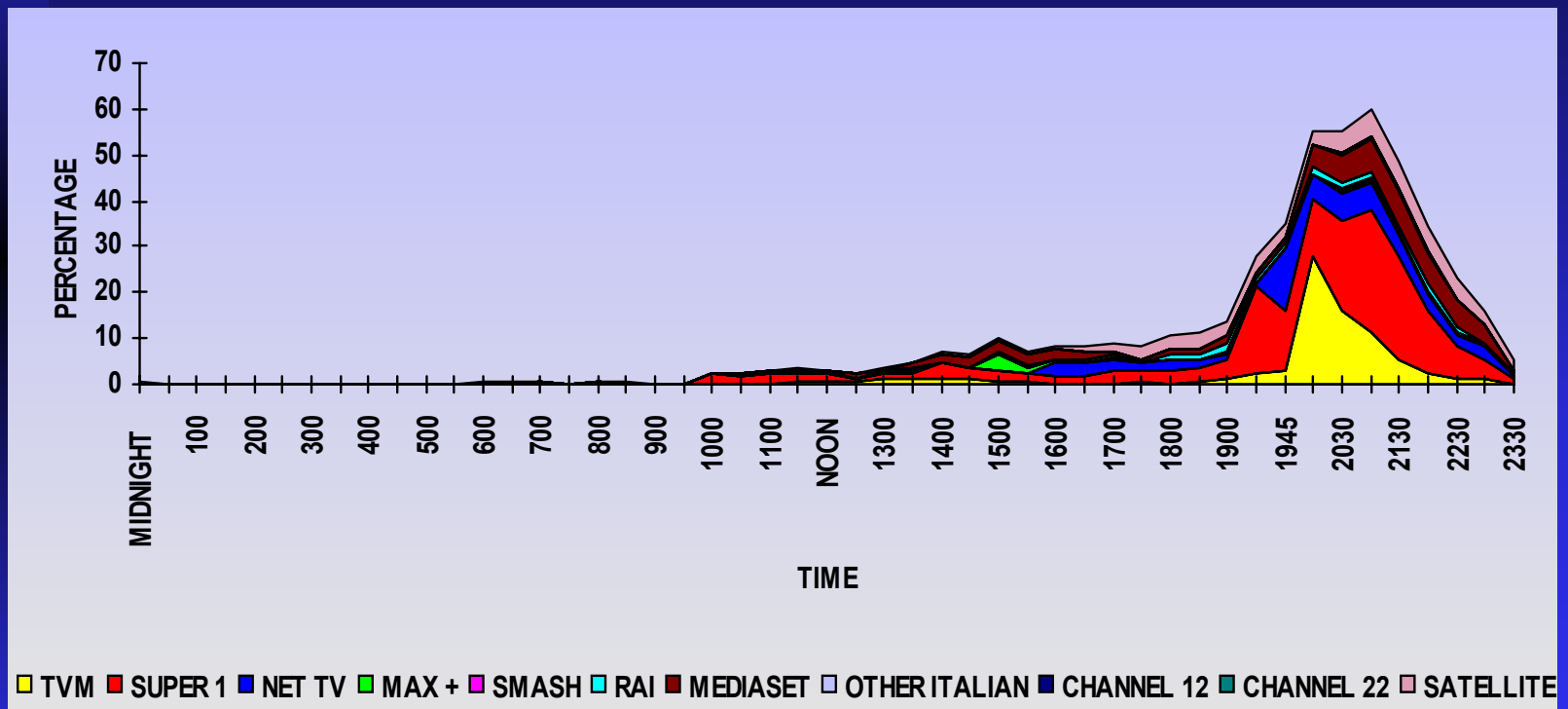
TV Viewing: Monday



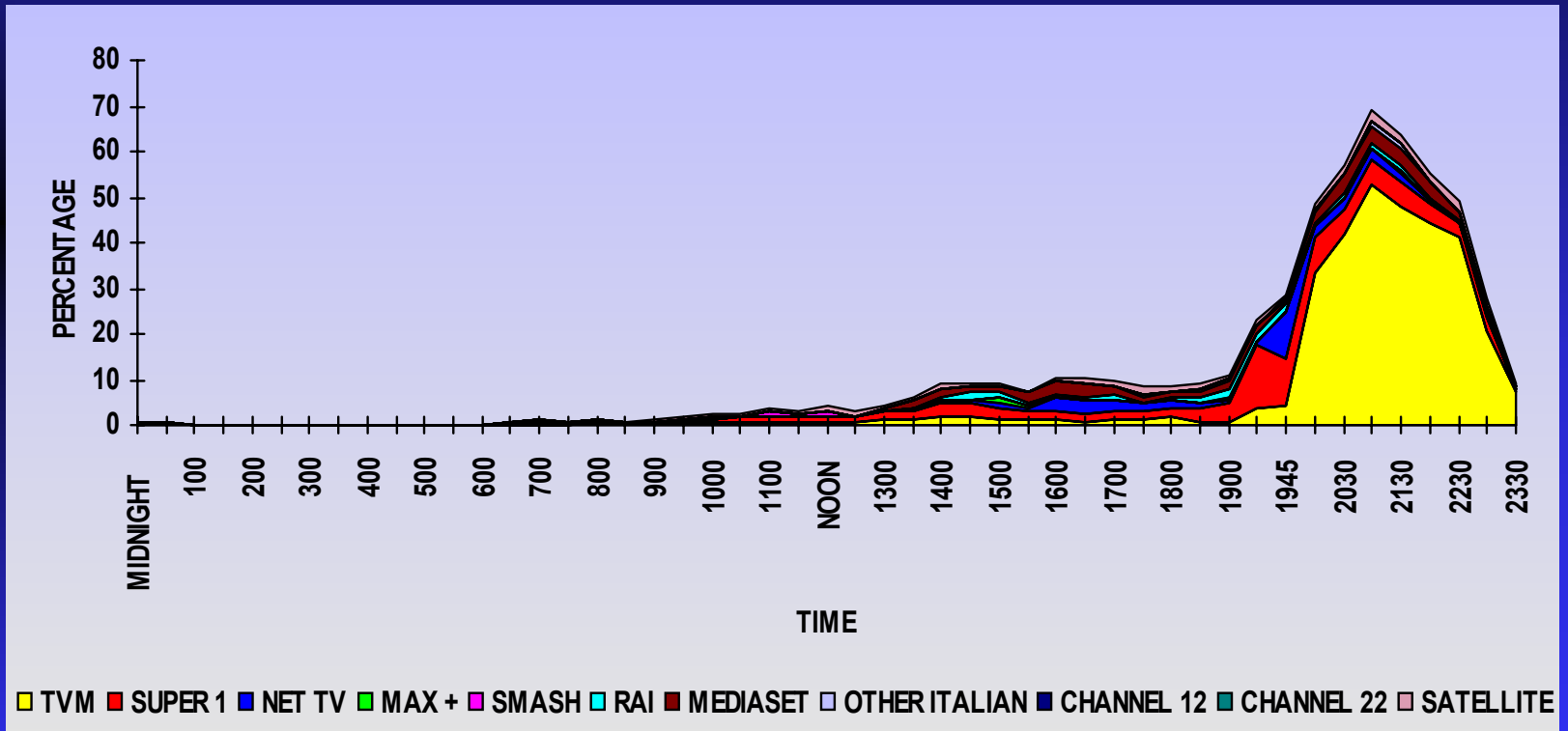


TV Viewing: Wednesday

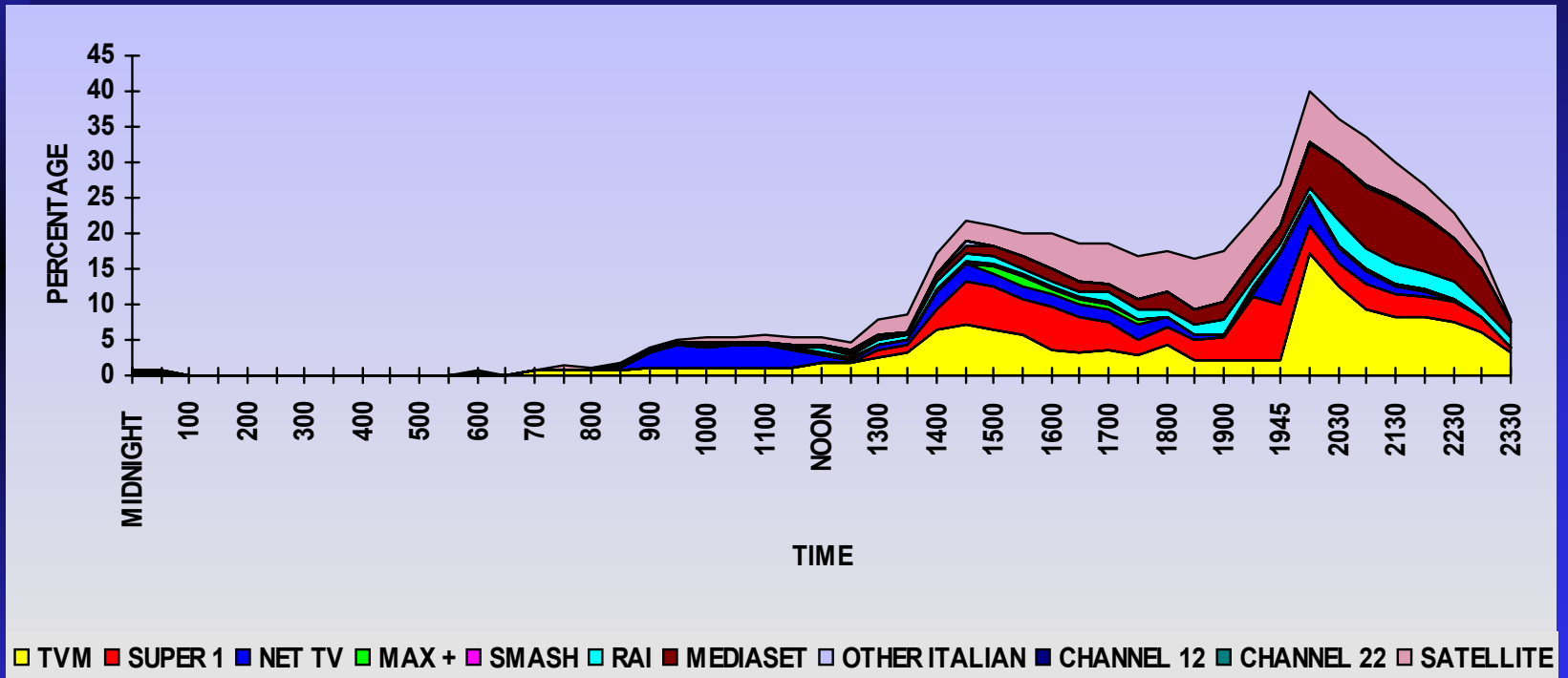


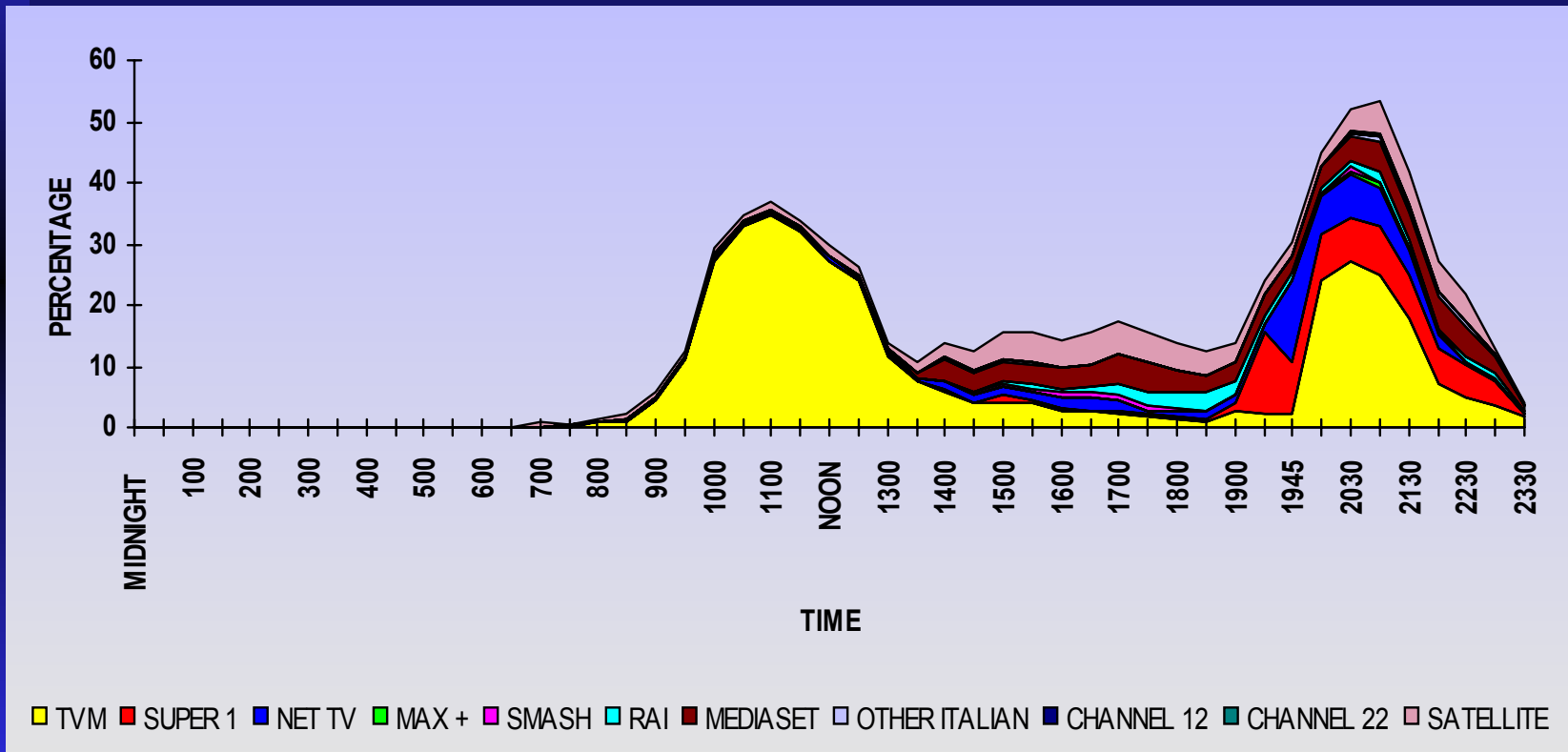


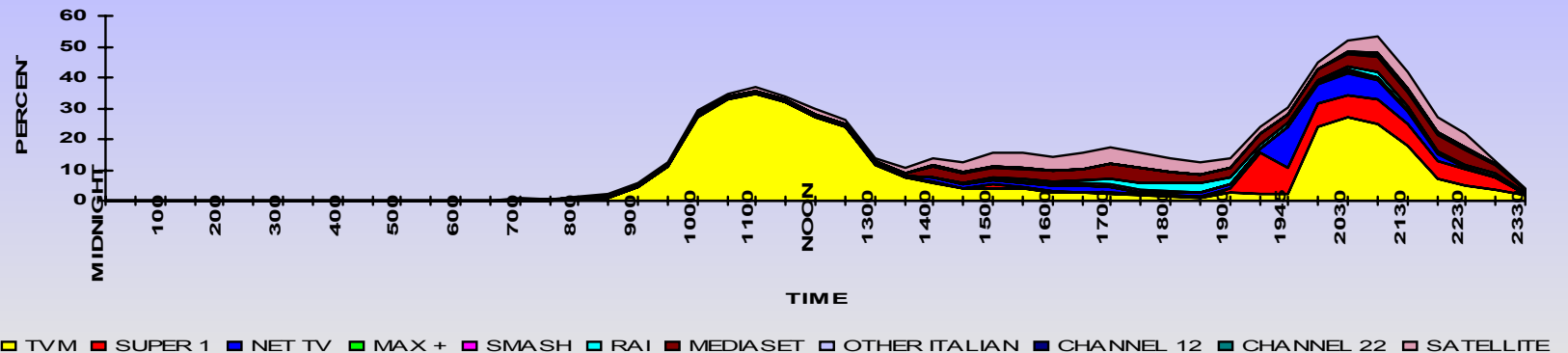
TV Viewing: Friday



TV Viewing: Saturday

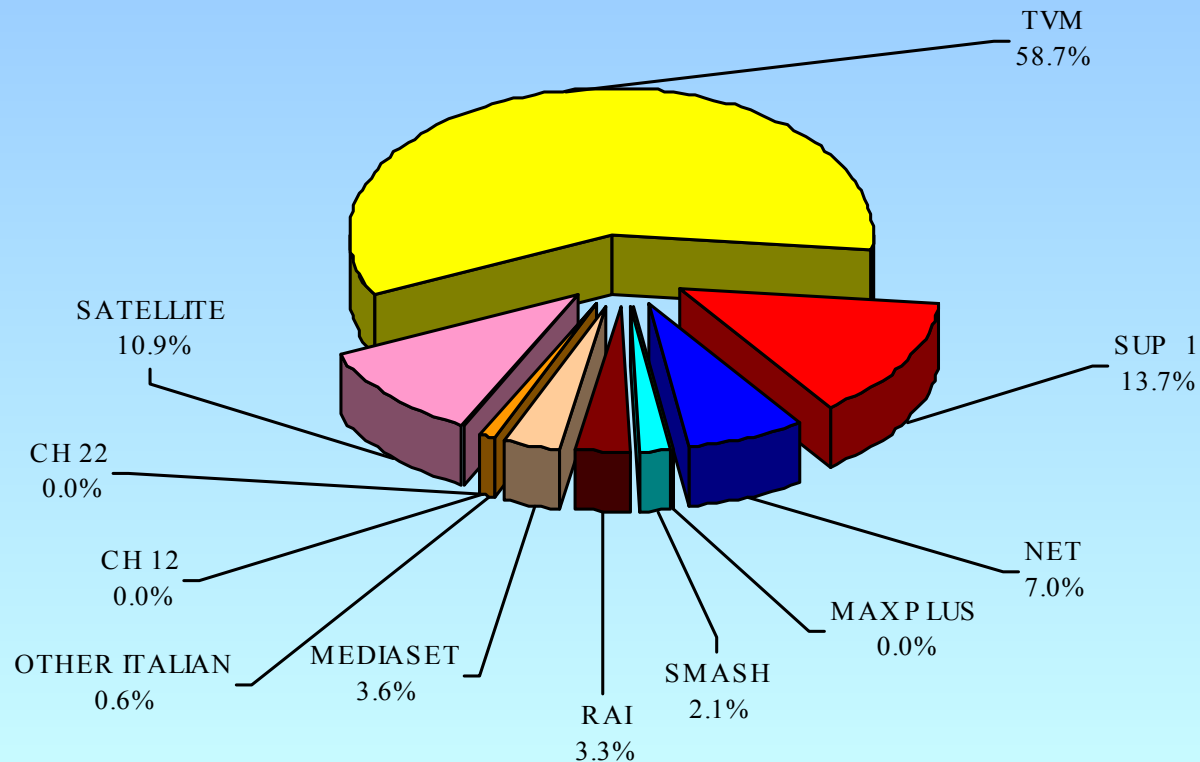






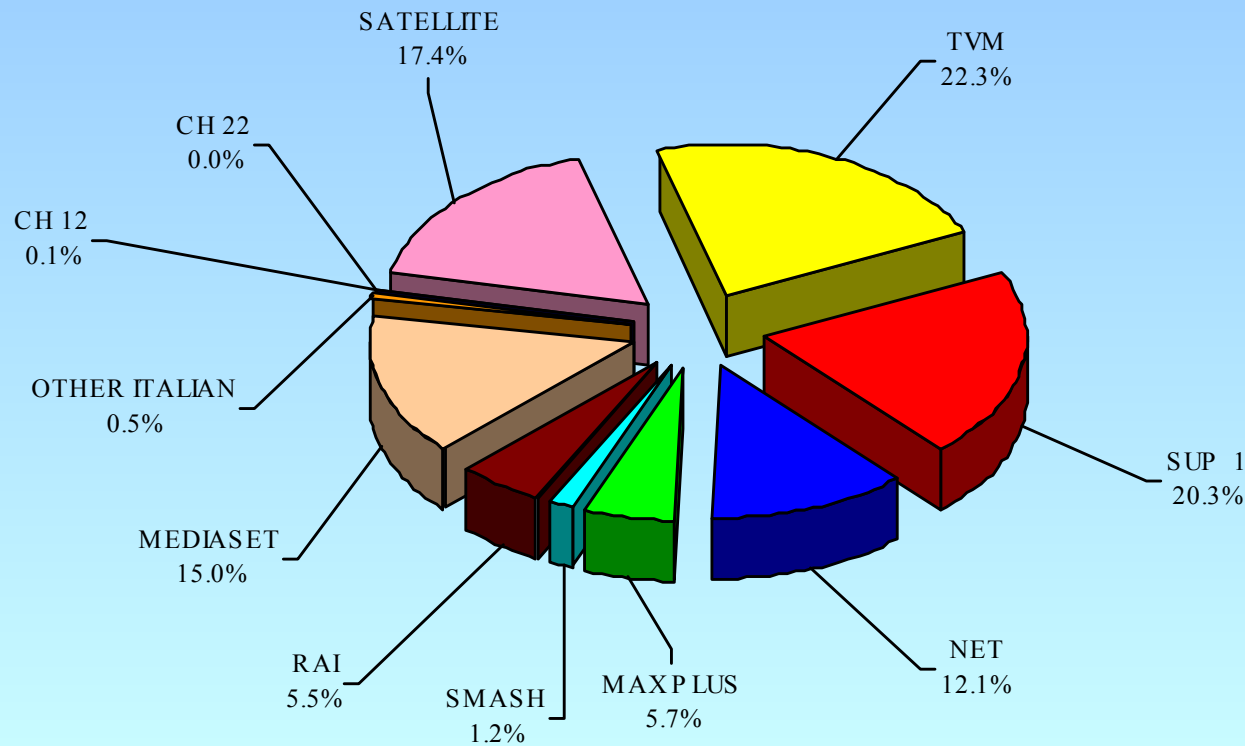
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



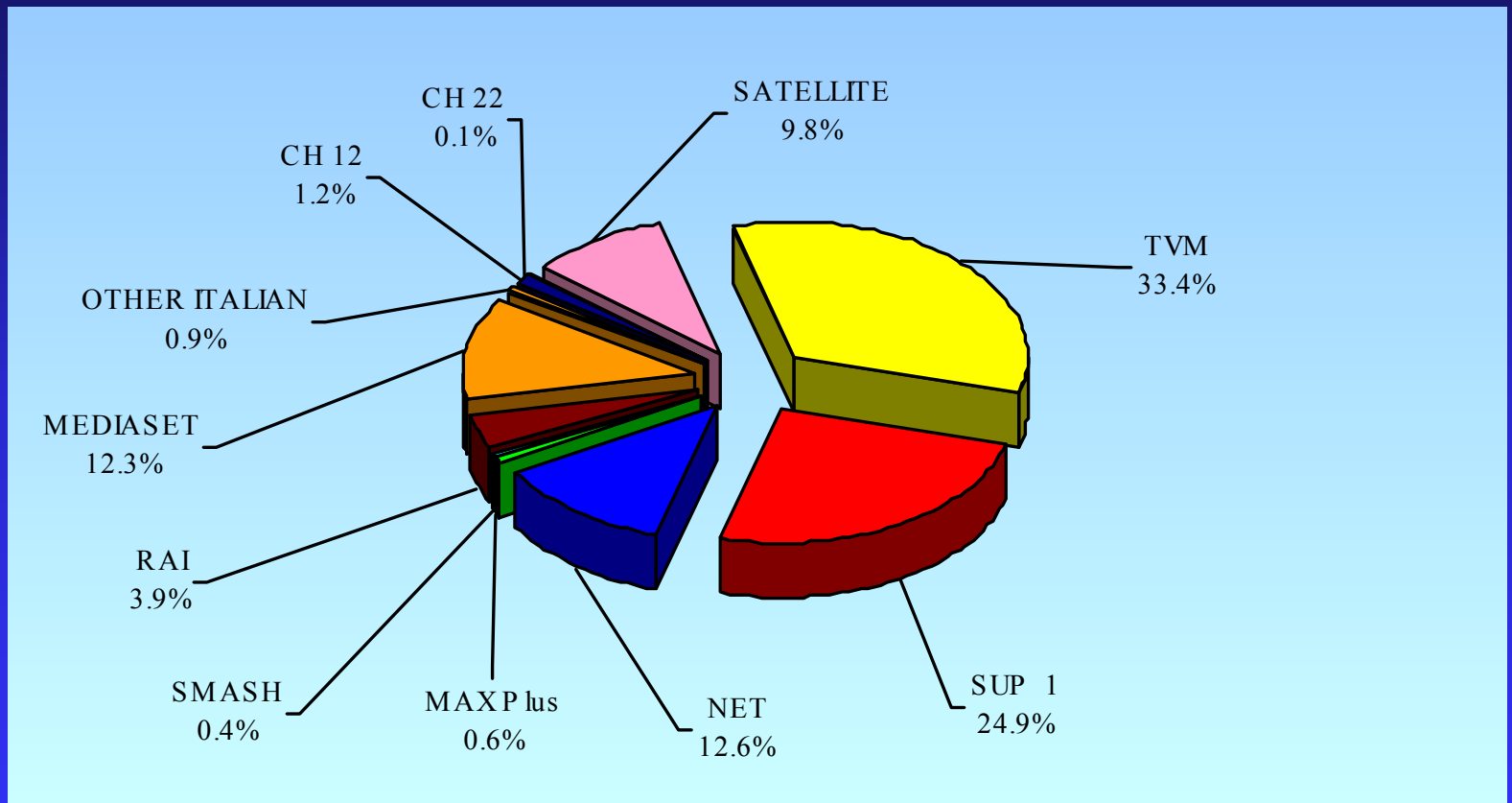
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



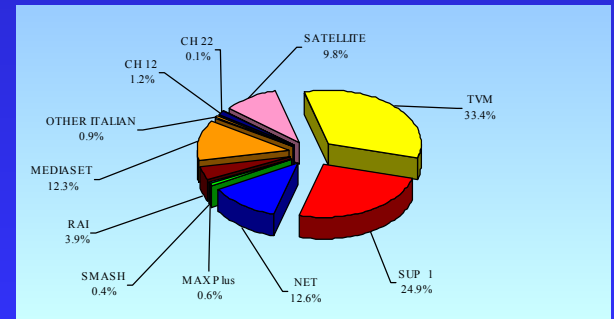
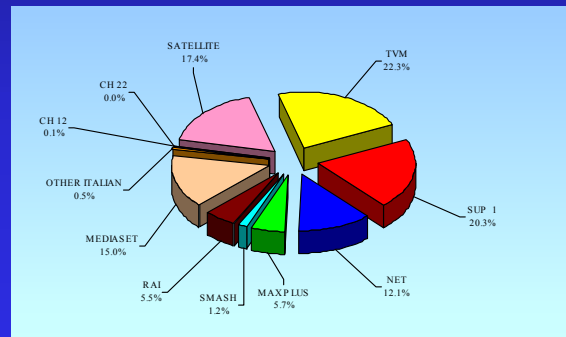
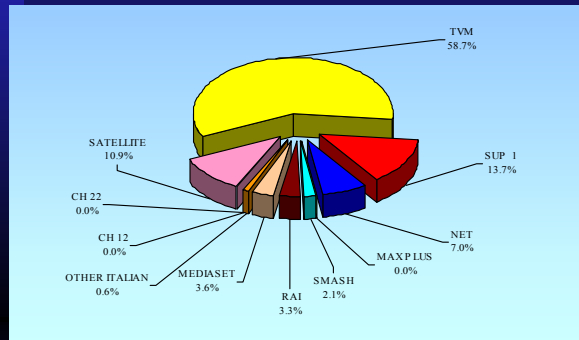
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



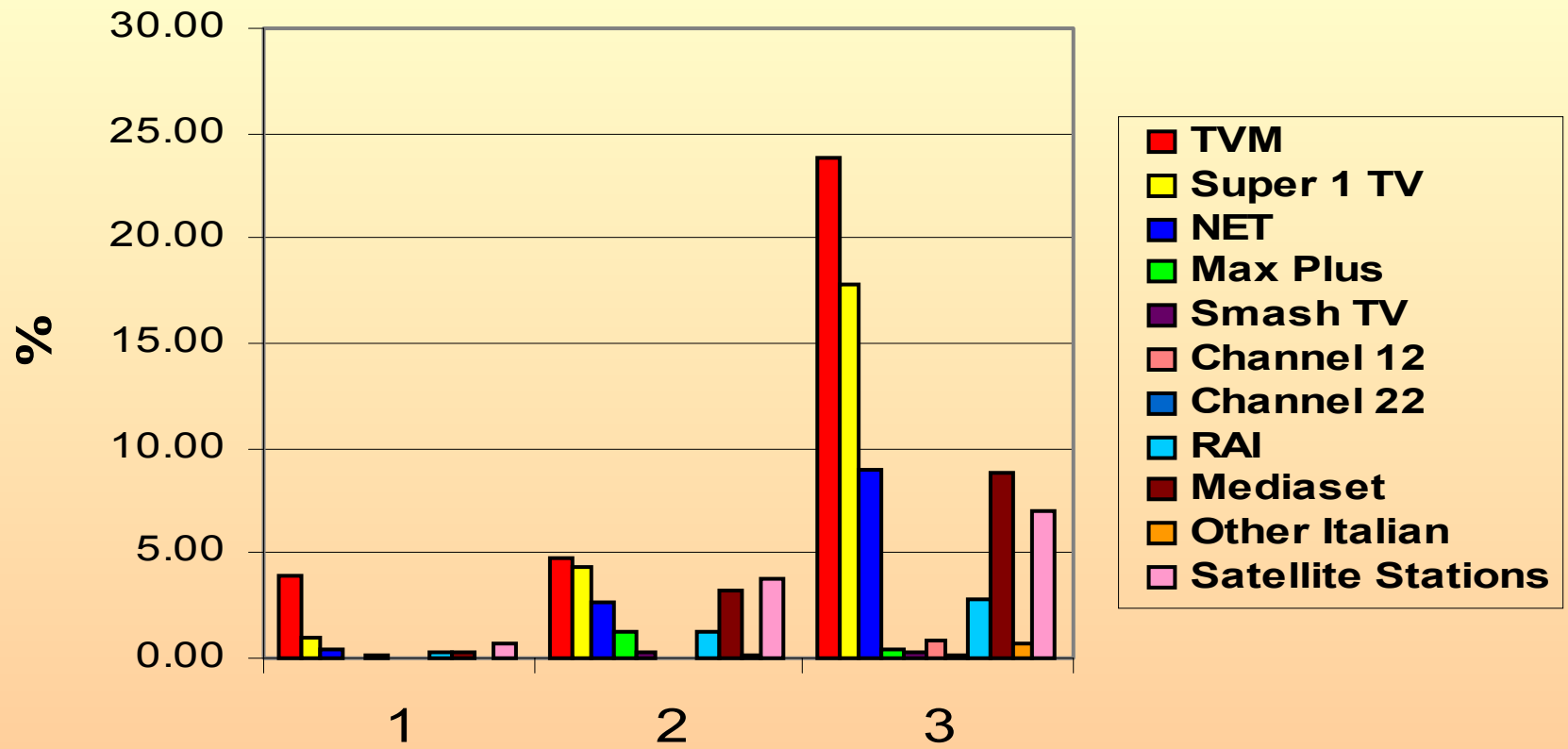
Daily Average TV Audience Levels

Time-Band Comparison



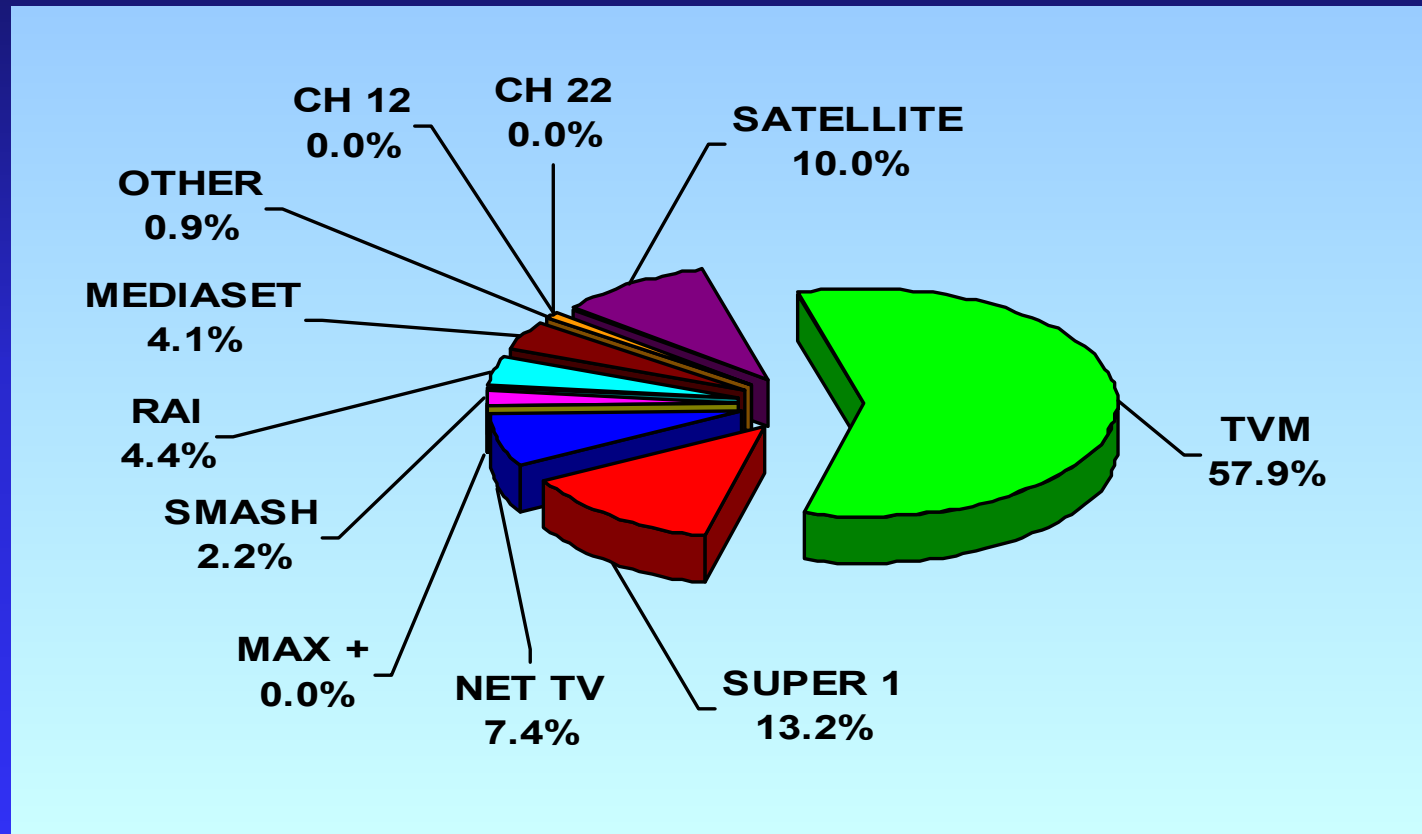
Daily Average TV Audience Levels

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



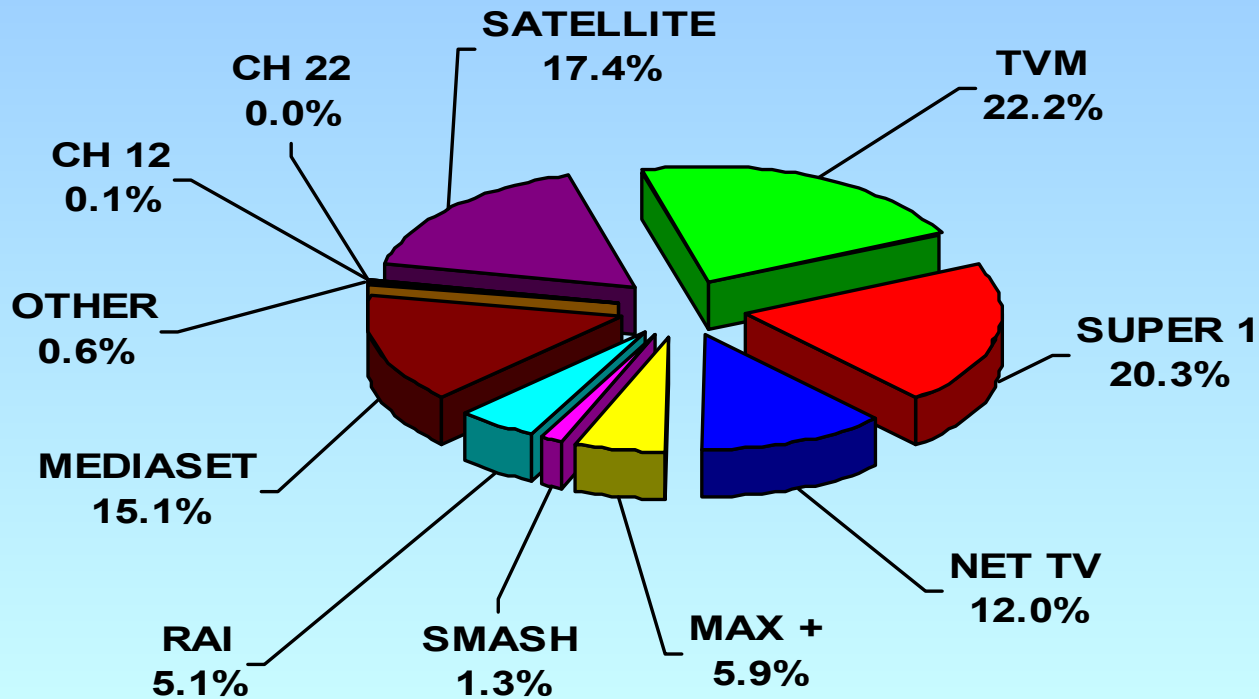
Daily Average TV Audience Levels

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



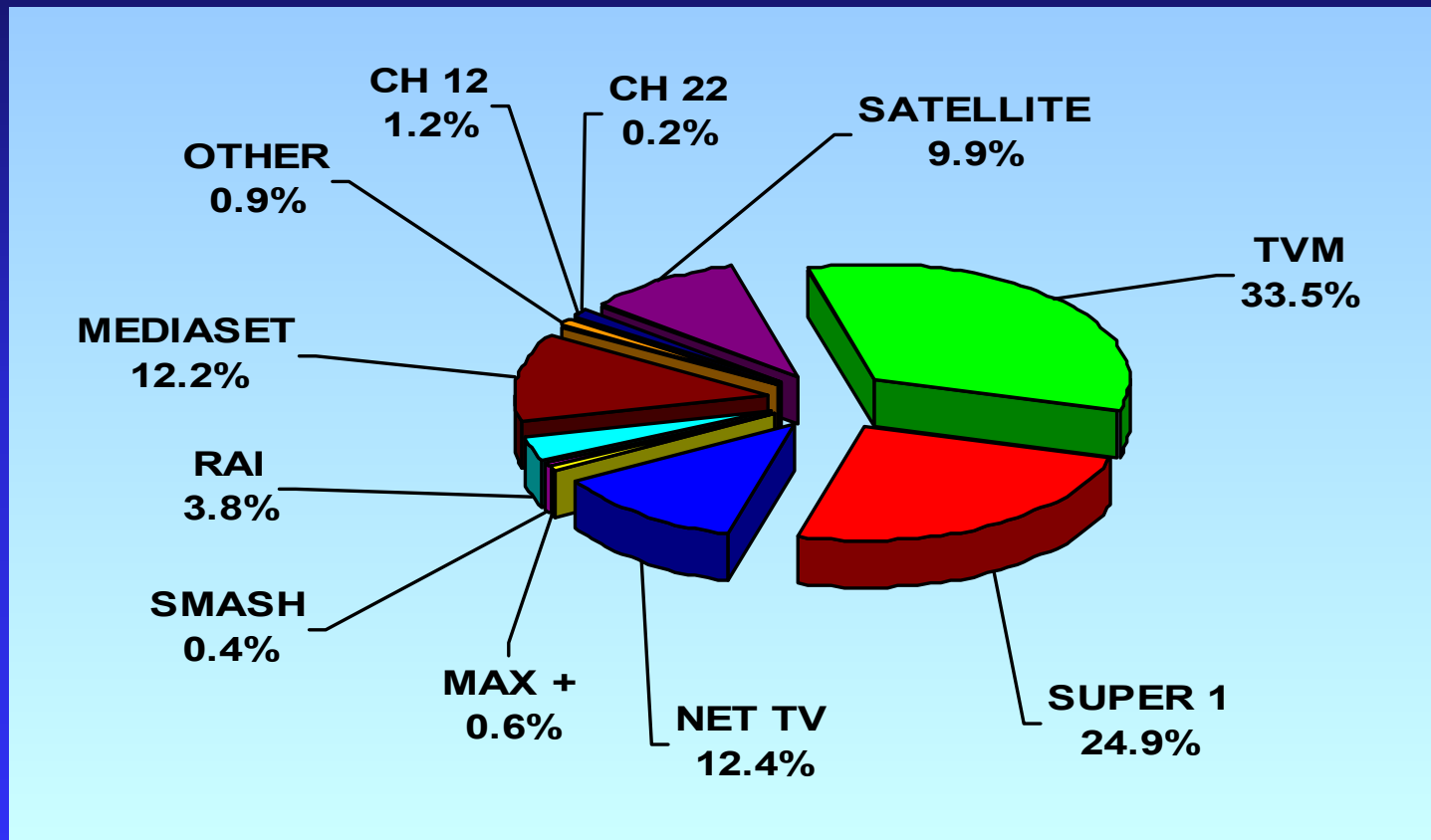
Daily Average TV Audience Levels

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	58.7	22.3	33.4
Super 1 TV	13.7	20.3	24.9
NET	7.0	12.1	12.6
Max Plus	-	5.7	0.6
Smash TV	2.1	1.2	0.4
Channel 12	-	0.1	1.2
Channel 22	-	-	0.1
RAI	3.3	5.5	3.9
Mediaset	3.6	15.0	12.3
Other Italian	0.6	0.5	0.9
Satellite Stations	10.9	17.4	9.8

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	58.7	22.3	33.4
Super 1 TV	13.7	20.3	24.9
NET	7.0	12.1	12.6
Max Plus	-	5.7	0.6
Smash TV	2.1	1.2	0.4
Channel 12	-	0.1	1.2
Channel 22	-	-	0.1
RAI	3.3	5.5	3.9
Mediaset	3.6	15.0	12.3
Other Italian	0.6	0.5	0.9
Satellite Stations	10.9	17.4	9.8

Conclusions:

- ❑ Radio audiences are increasing in absolute size in respect of April 2002, but decreased in respect of October 2001.
- ❑ TV audience are growing in absolute size in all three time-bands in respect of April 2002, but only in time-band 1 in respect of October 2001

Radio Stations: Relative Strengths

6.00 a.m. - Midnight

- Super 1 – 25.2%
- RTK – 17%
- Radju Malta – 12.6%
- Radio 101 – 11.8%
- Bay Radio – 8.9%
- Radju Parlament – 8.7%
- Capital – 5.7%
- Smash – 3.9%
- Calypso – 3.2%
- Island Sound – 2.2%
- FM Bronja – 0.8%
- Campus FM – 0.1%

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
- The greatest expansion this time is registered by *Tista' Tkun Int!*

Trends in TV Audiences

- ❑ TVM has the largest audiences in all Time Bands
- ❑ Super 1 is second best station
- ❑ TVM has the largest audience in absolute terms with *Xarabank*.
- ❑ Super 1 TV has lost relative audience share in all three time bands
- ❑ Drama has become very important
- ❑ Consumers are asking stations not to broadcast the same genre at the same time.

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!