

TV & Radio Audiences in Malta

Broadcasting Authority

2nd Quarter 2003

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 - 2003 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	72.0	72.7	71.8
Do Not Listen to the Radio	28.0	27.8	28.2

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	721	354	367
	%	%	%
Varies Considerably	0.4	-	0.8
One Hour	29.3	33.9	24.8
Two Hours	23.3	23.4	23.2
Three Hours	12.2	11.0	13.4
Four to Nine Hours	31.8	27.7	35.5
Ten Hours and more	3.0	4.0	2.3

Where is Radio Listened to

	Total	Male	Female
N=	721	354	367
	%	%	%
NA	0.6	0.8	0.3
At home	74.3	61.9	86.4
At work	16.6	26.6	7.1
In the car	35.5	48.6	22.9

Who watches TV

	Total	490	511
N=	1001	490	511
	%	%	%
Watch TV	99.4	99.4	99.4
Do Not watch TV	0.6	0.6	0.6

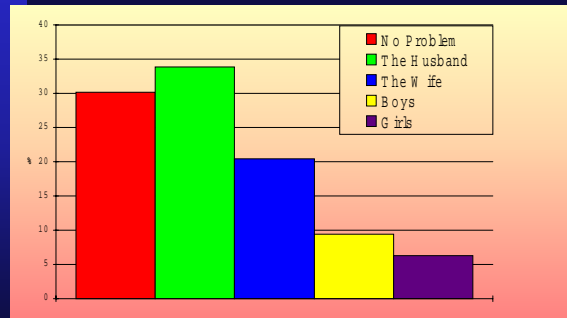
Average No. of Hours TV is watched

	Total	Male	Female
N=	995	487	508
	%	%	%
Varies Considerably	0.3	0.4	0.2
One Hour	11.8	11.5	12.0
Two Hours	34.7	34.9	34.4
Three Hours	28.7	29.8	27.8
More than three Hours	24.5	23.4	25.6

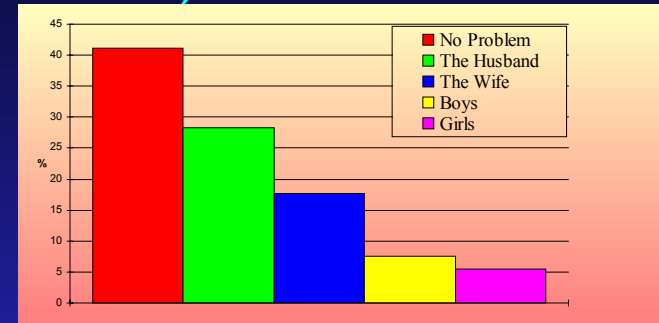
Where TV is Watched

	Total	Male	Female
N=	995	487	508
	%	%	%
Sitting Room	50.3	49.7	50.8
Dining Room	3.3	2.9	3.7
Kitchen	18.5	13.8	23.0
Bedroom	27.0	31.8	22.4
Another Place	0.9	1.8	-

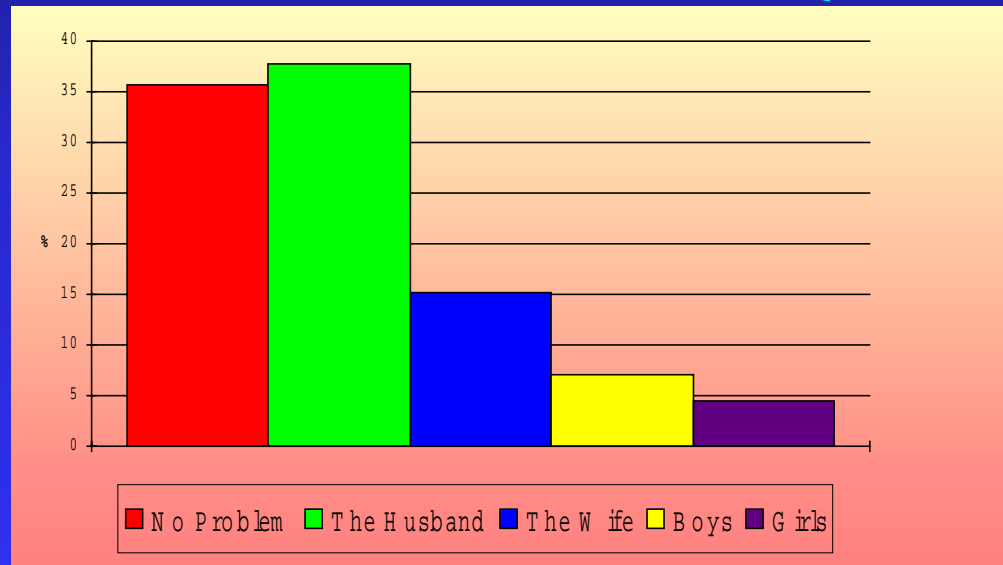
Who decides on Choice of Channel (2002 - 2003)



2nd Quarter 2002



4th Quarter 2002



2nd Quarter 2003

Mode of Receiving TV Signal

Base= All

	Total	AB	C1	C2	DE
N=	1001	143	285	289	284
	%	%	%	%	%
Roof Antenna	32.5	22.4	28.8	35.6	38.0
Cable	67.3	76.2	69.8	65.4	62.3
Satellite	13.6	16.8	16.5	11.1	11.6

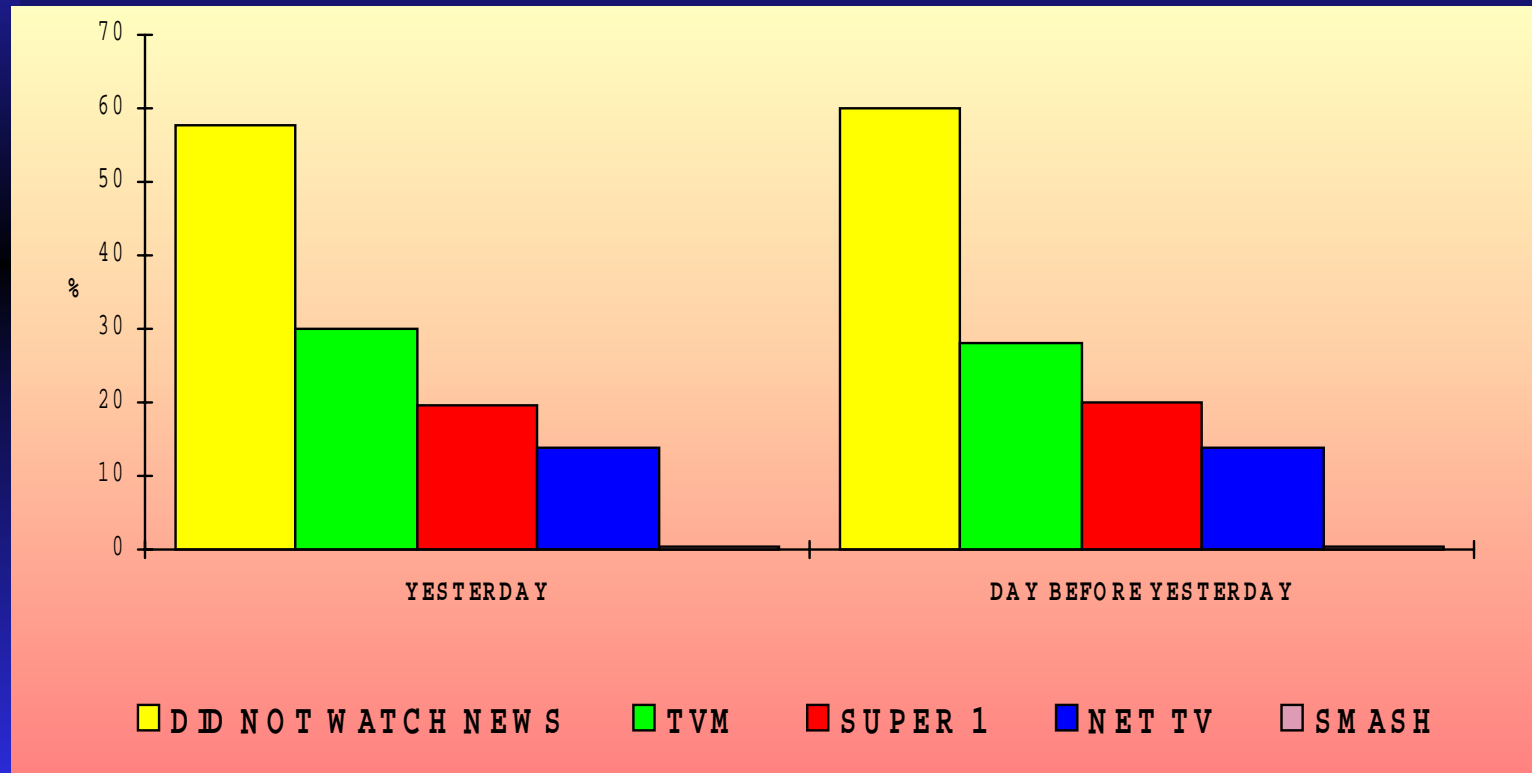
Preferred Source for Local News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.0	1.6	0.4
Radio	7.4	5.5	9.2
TV	84.1	83.7	84.5
Newspaper	5.7	7.8	3.7
From Other Persons	1.8	1.4	2.2

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	2.5	3.3	1.8
Radio	6.5	5.3	7.6
TV	85.9	85.3	86.5
Newspaper	3.4	4.5	2.3
From Other Persons	1.7	1.6	1.8

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



General Preference for Programme Sectors

(Radio: 2nd Quarter 2002- 2003)

	2002 (2 nd Quarter)	2003 (2 nd Quarter)
	%	%
Music	85.3	89.3
Local News	74.9	77.5
Foreign News	71.7	73.8
Discussions on Personal Problems	51.9	54.6
Current Affairs	35.3	44.0
Health/Beauty/Home/Law	43.4	43.0
Religion	40.2	41.9
Women	36.1	35.9
Culture	33.3	34.4
Sports	30.3	34.3

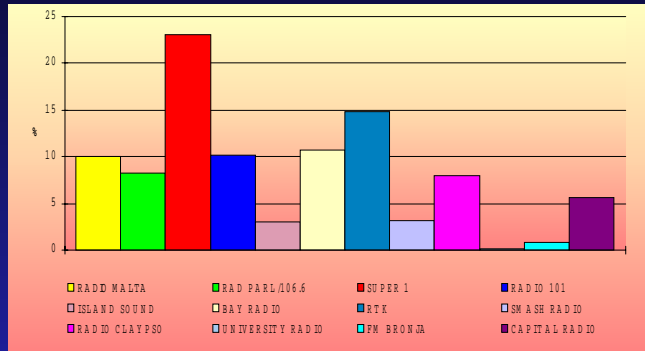
General Preference for Programme Sectors

(TV: : 2nd Quarter 2002- 2003)

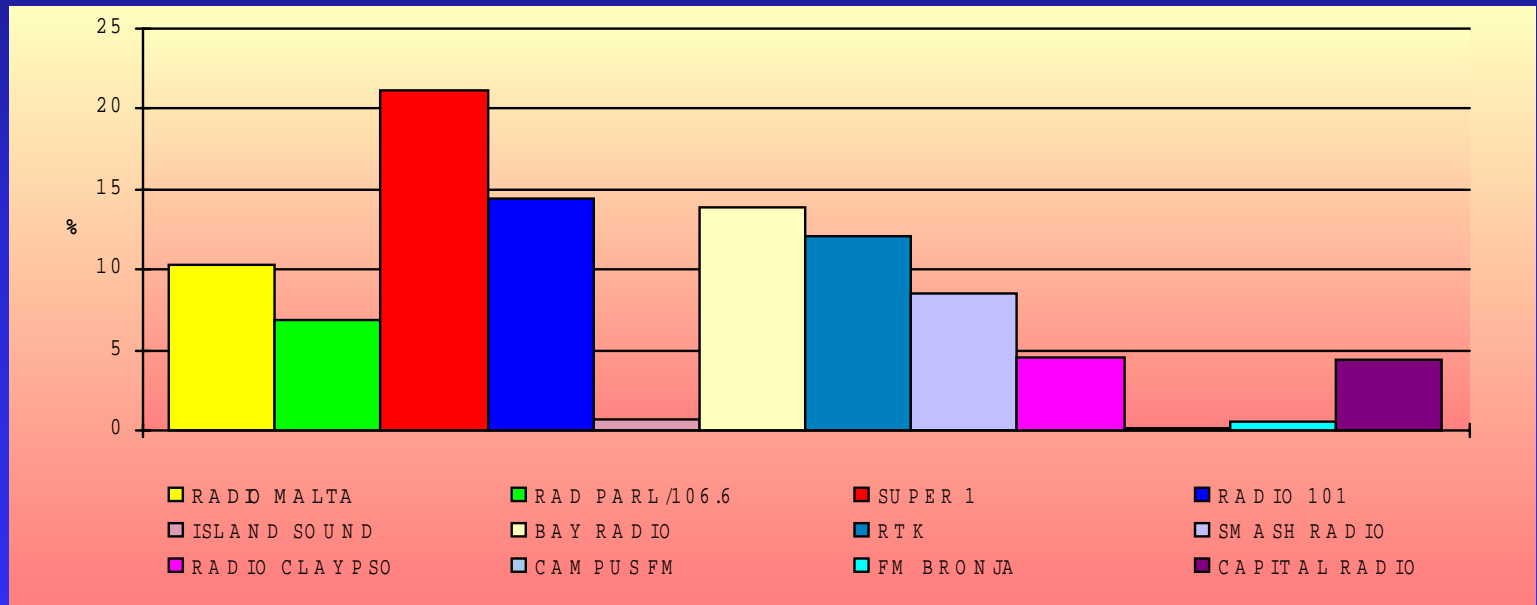
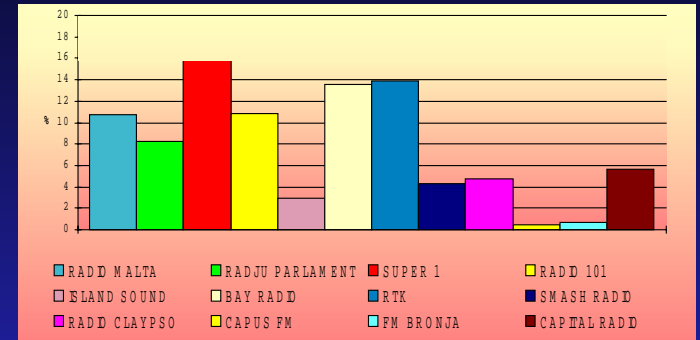
	2002 (2 nd Quarter)	2003 (2 nd Quarter)
	%	%
Local News	91.3	94.8
Foreign News	91.7	93.9
Feature Films	72.7	73.3
Documentaries	59.3	71.6
Weather	68.6	70.4
Discussions	69.2	69.3
Quizzes / Game Shows / Variety Programmes	51.6	65.9
Sports	55.0	58.2
Plays	50.5	53.4
Serials/Soap Operas	51.0	52.5
Current Affairs	42.9	48.9

Overall Performance as 'Best' Radio Station

2002(a)



2002(b)



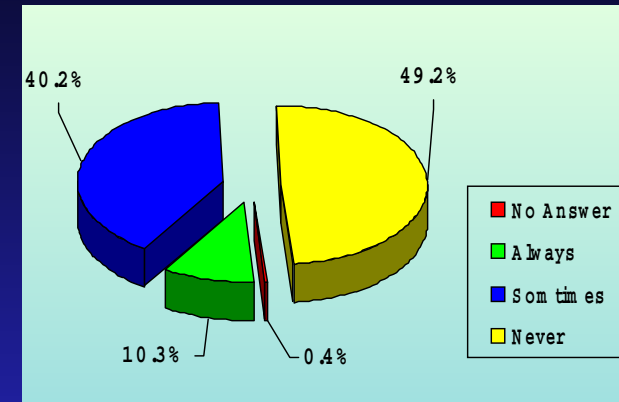
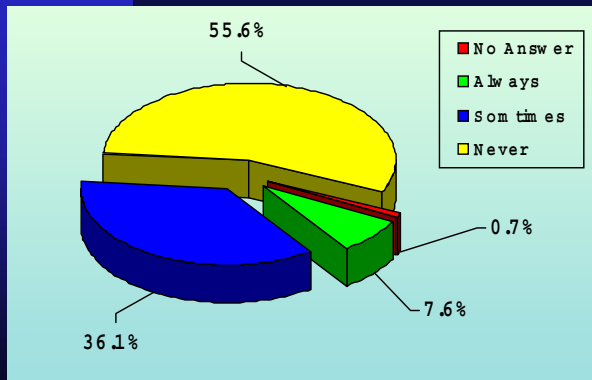
4th Quarter 2002

Interest in Political Broadcasts

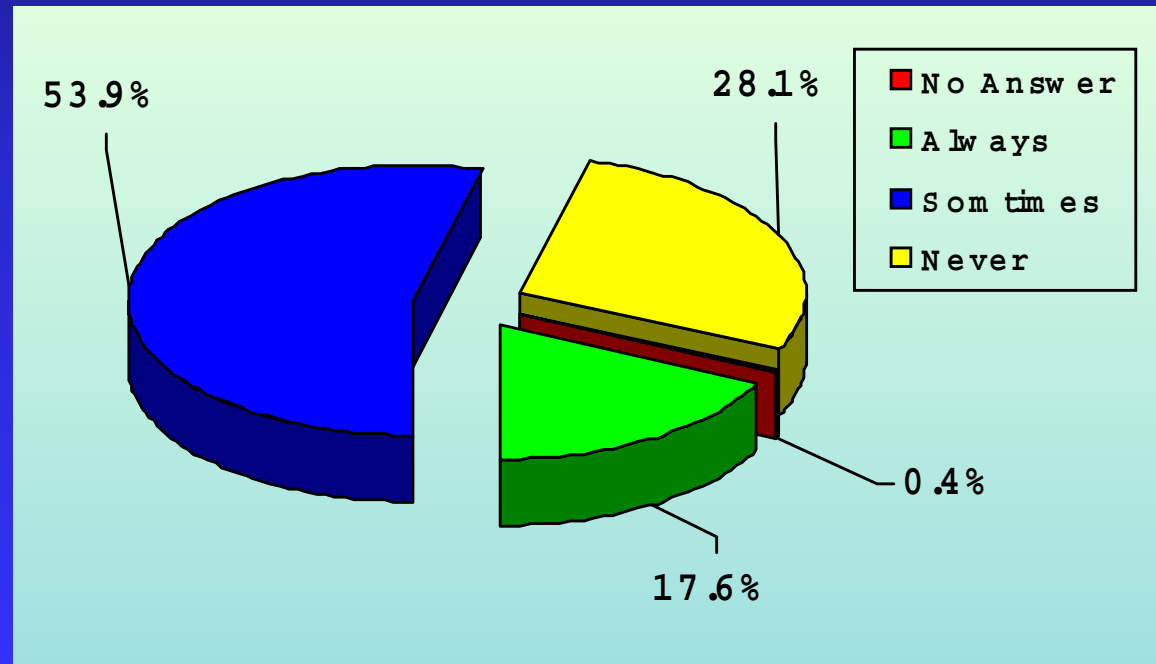
(2002 – 2003)

2002(a)

2002(b)

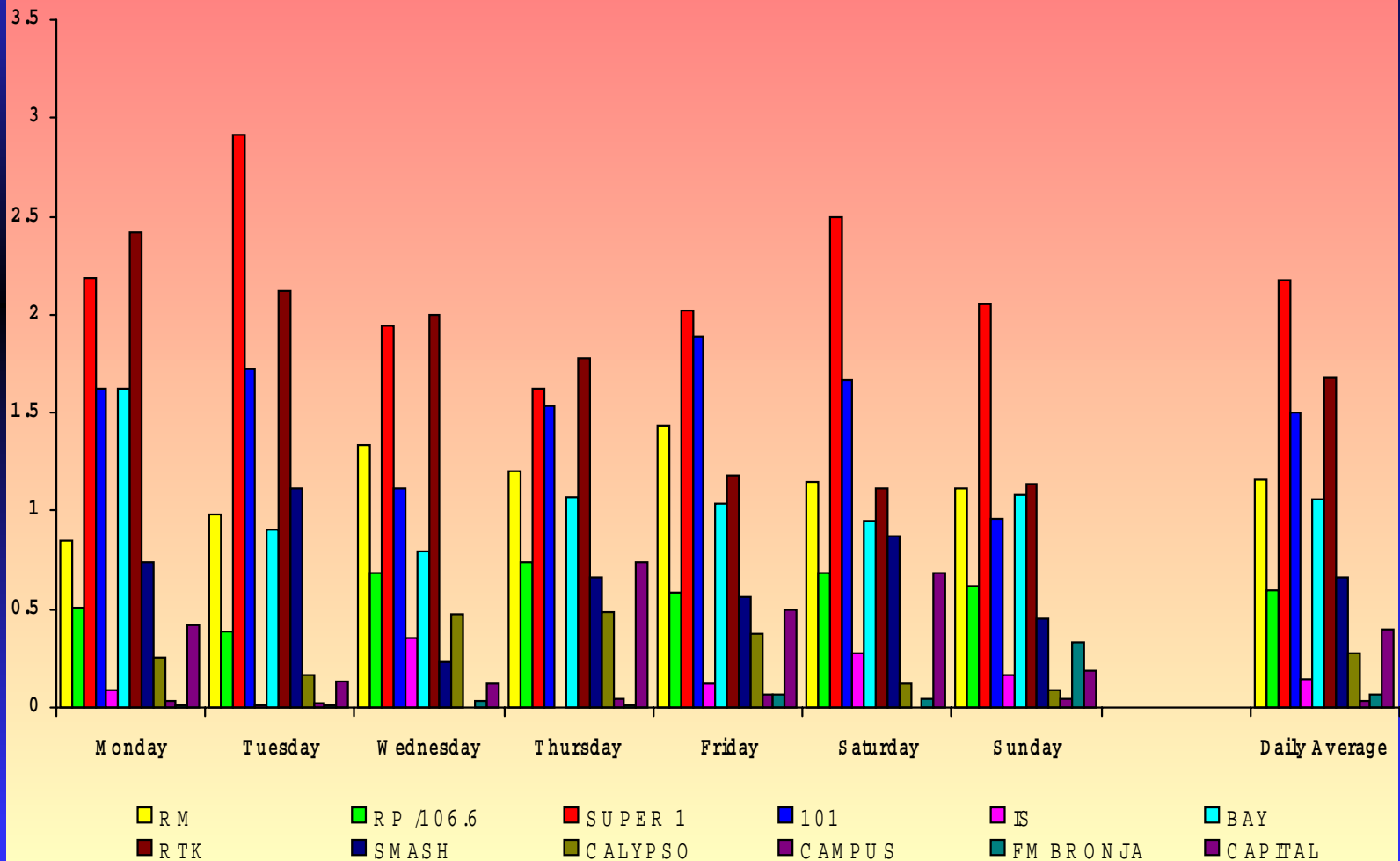


2nd Quarter
2003

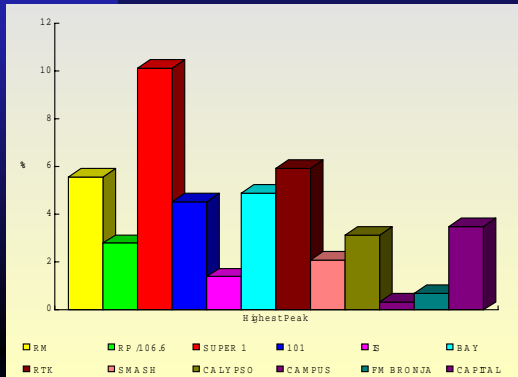


Daily Radio Average Audience Share

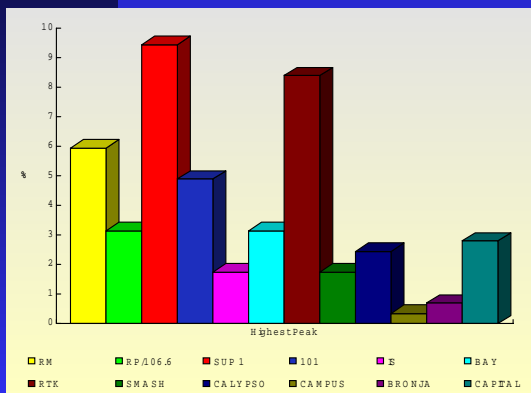
(Basis: Total No. of Transmission Hours)



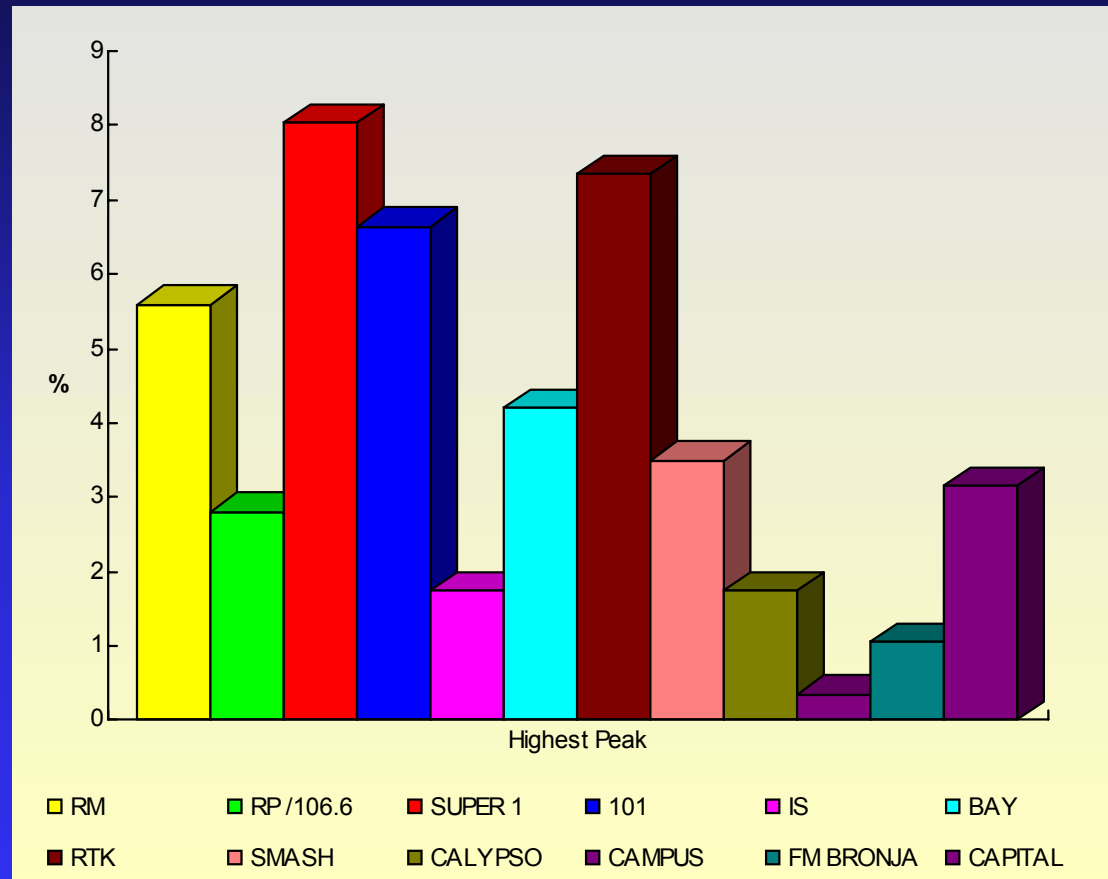
Highest Radio Station Peak Audience Share



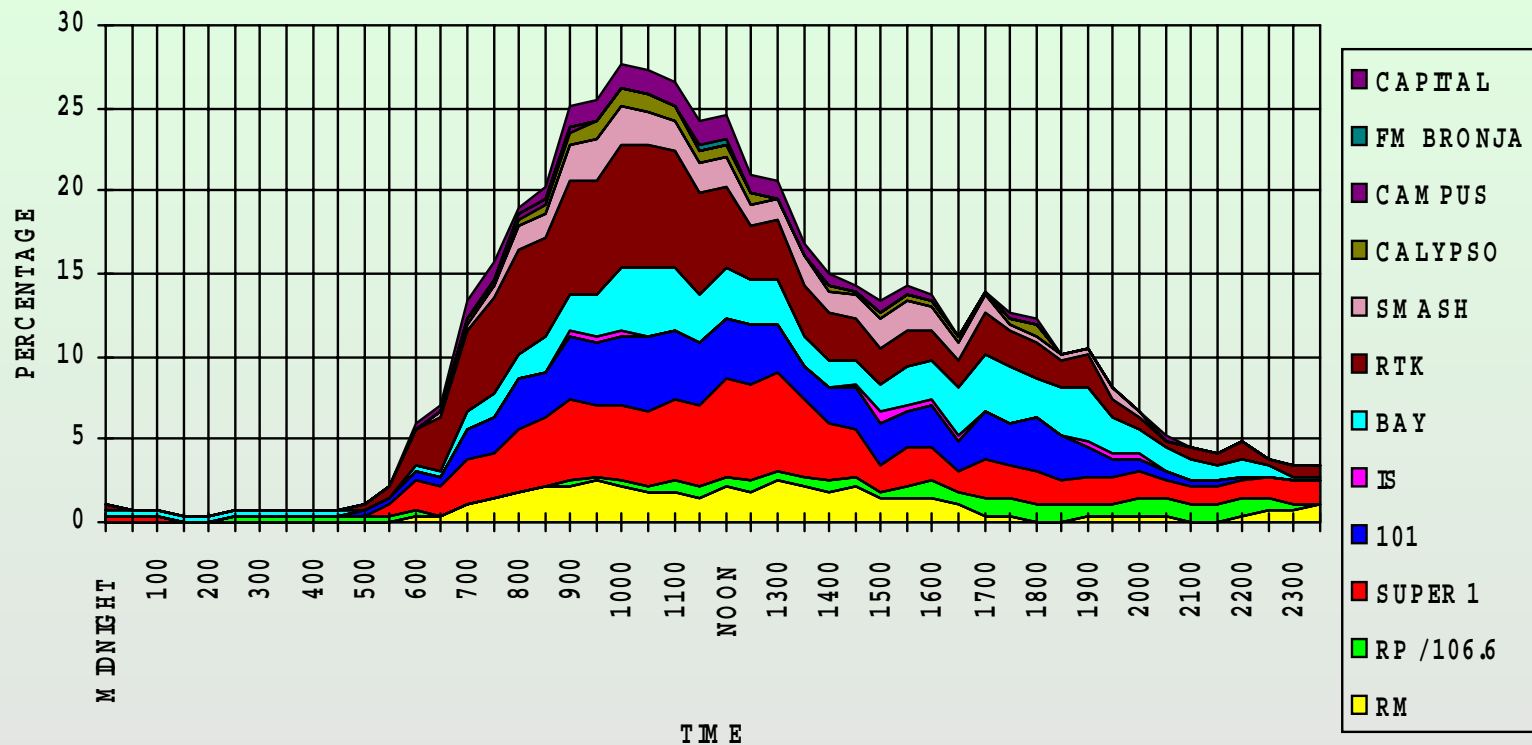
2002 (a)



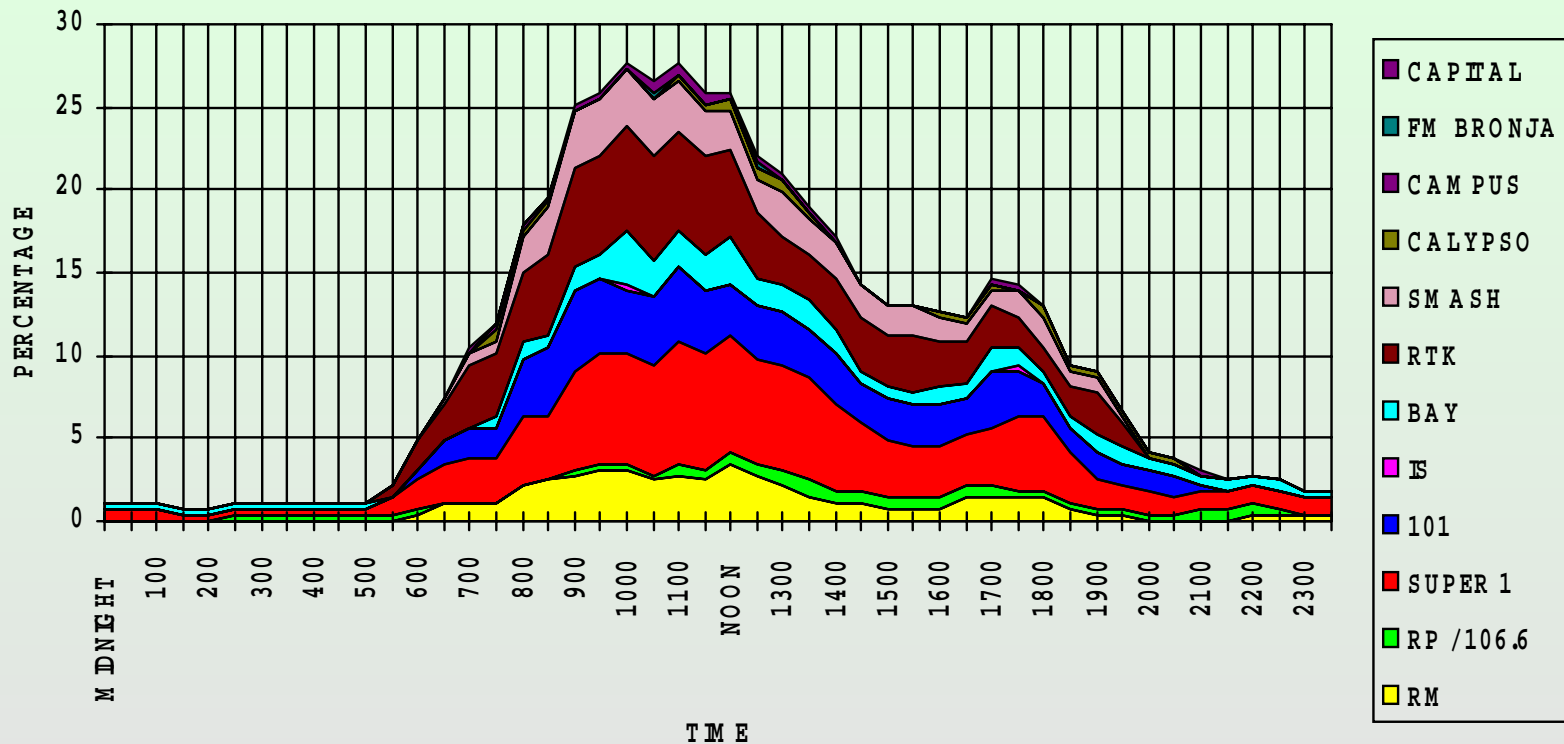
2002 (b)



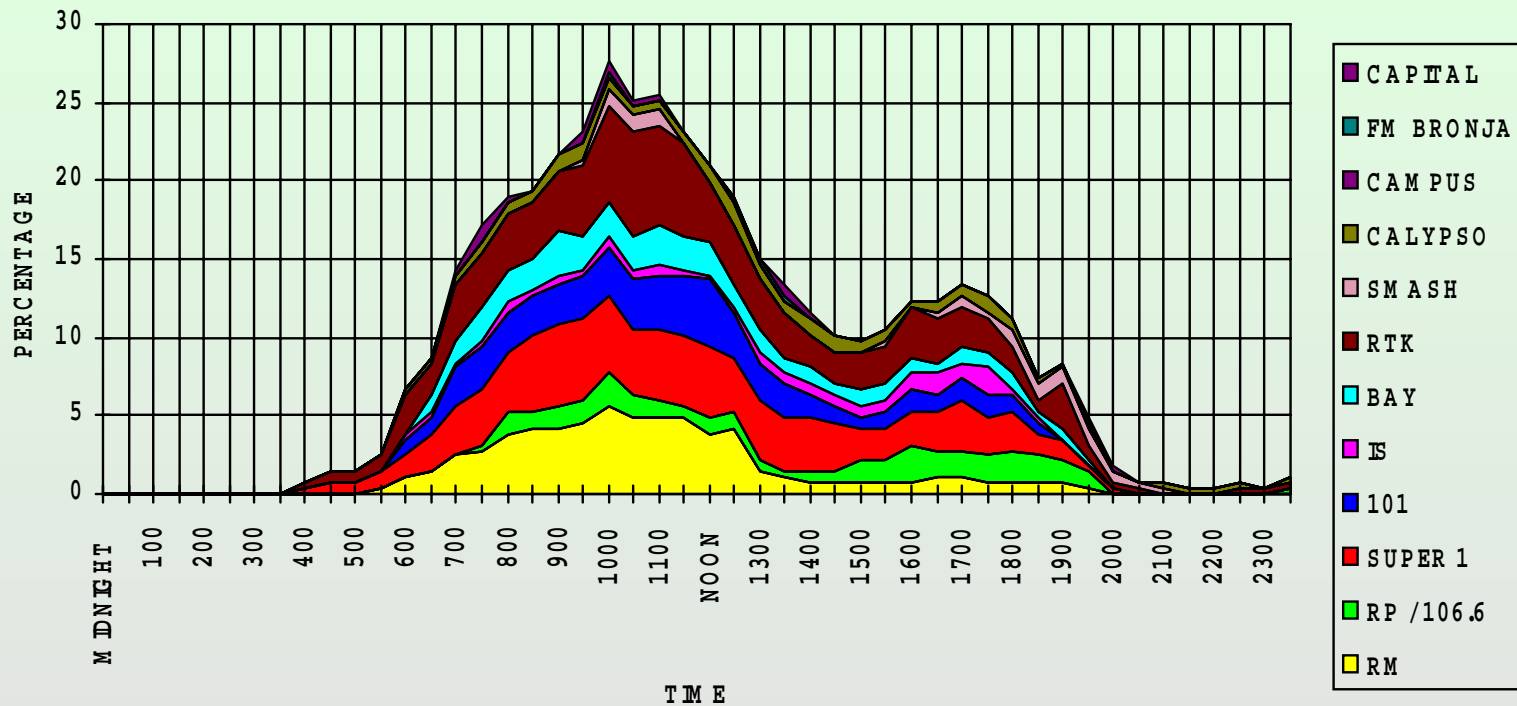
2nd Quarter 2003

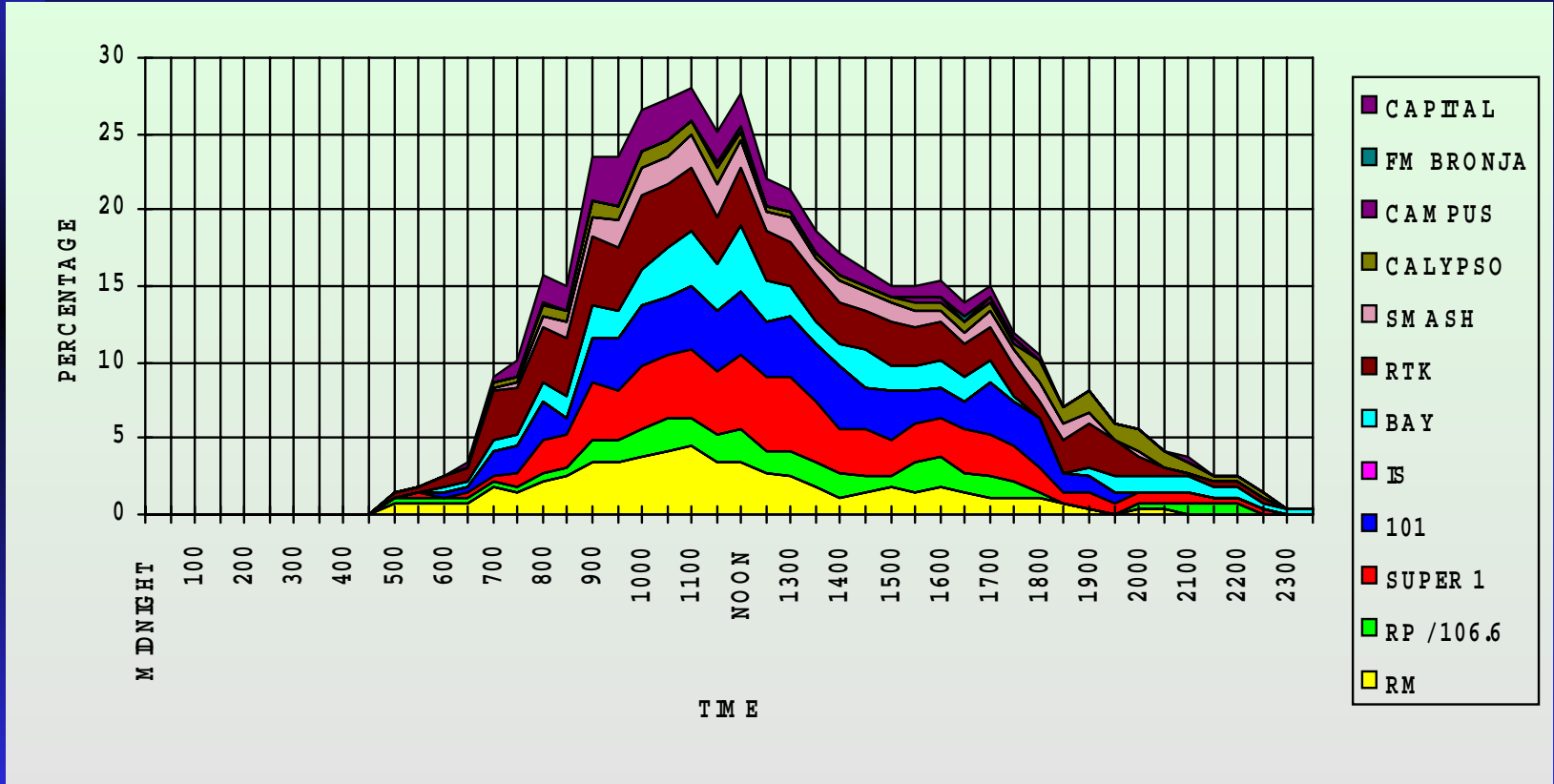


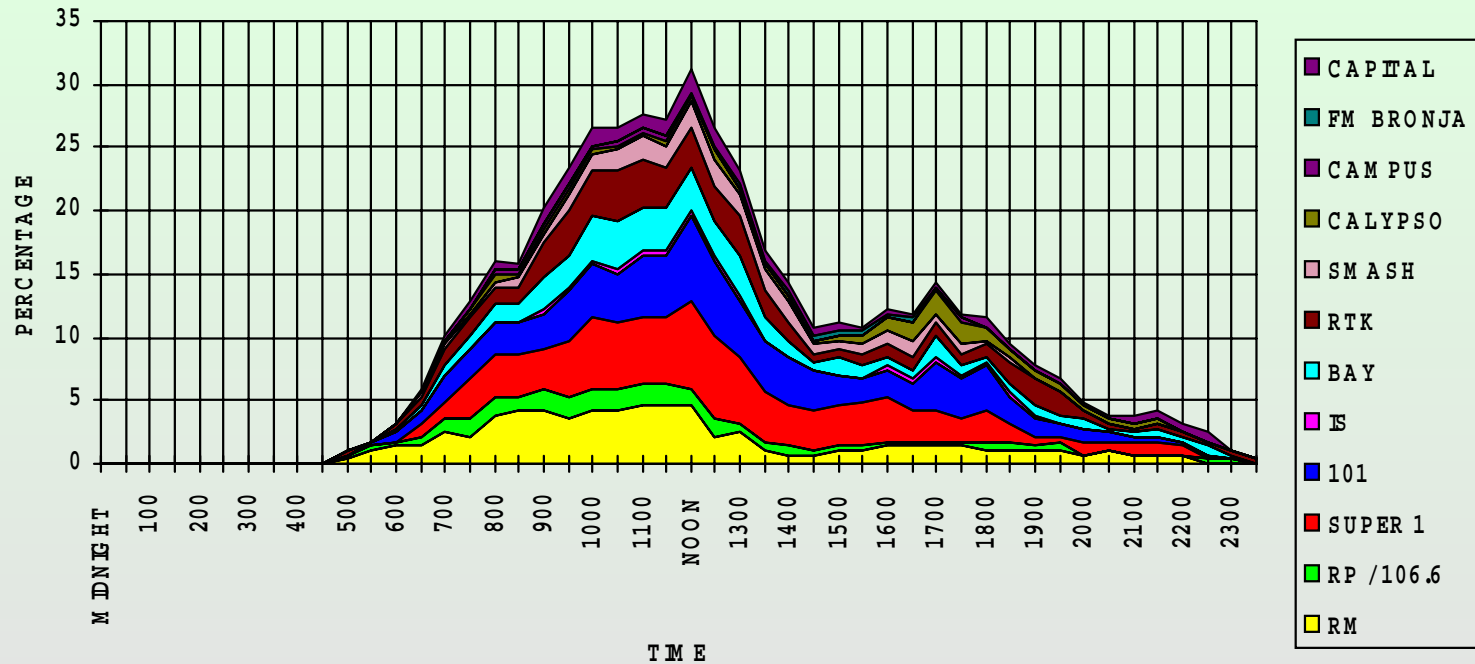
Radio Audiences: Tuesday

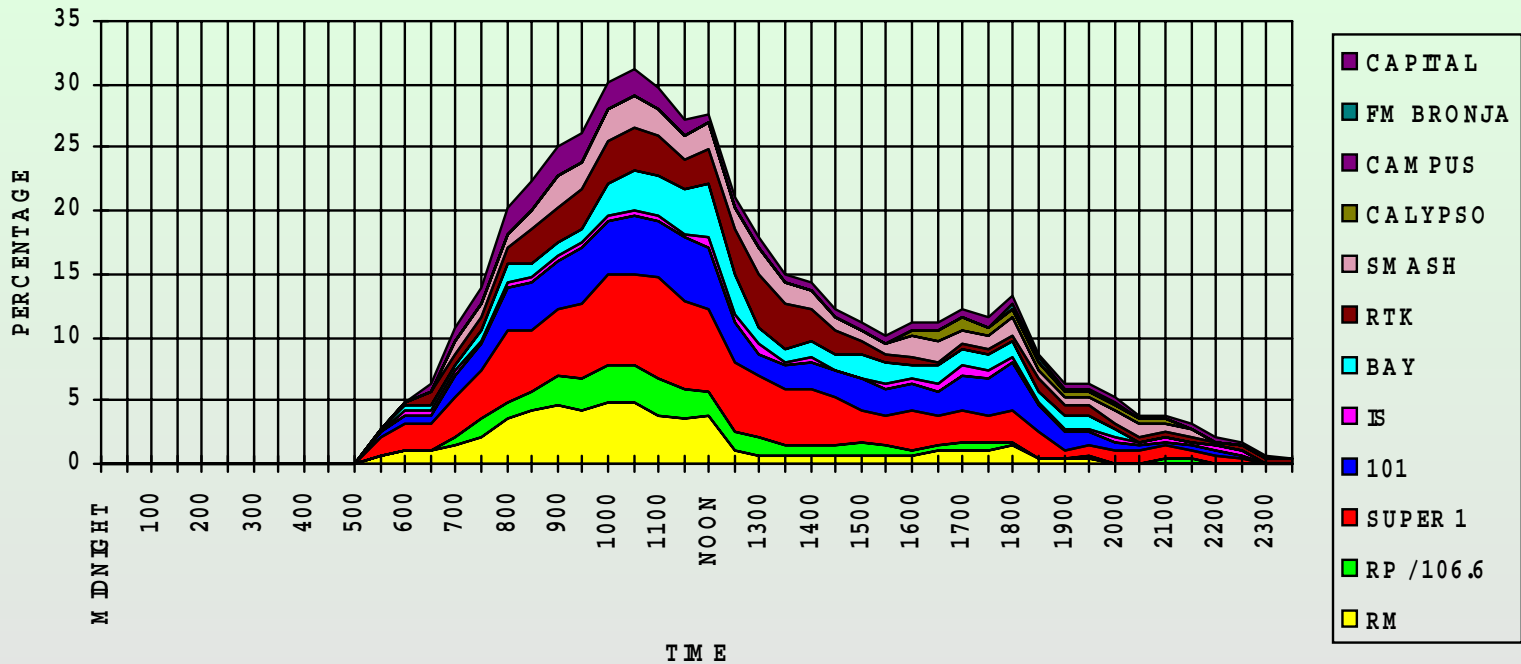


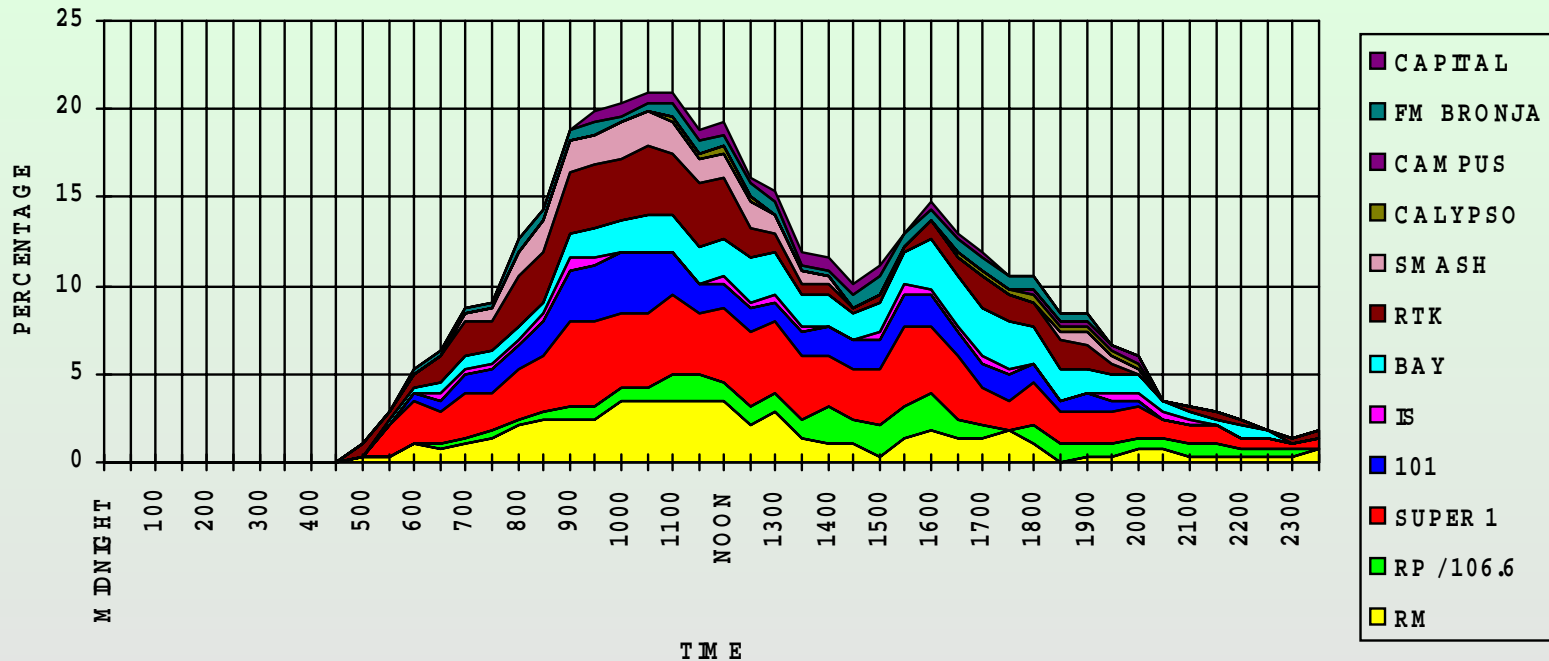
Radio Audiences: Wednesday









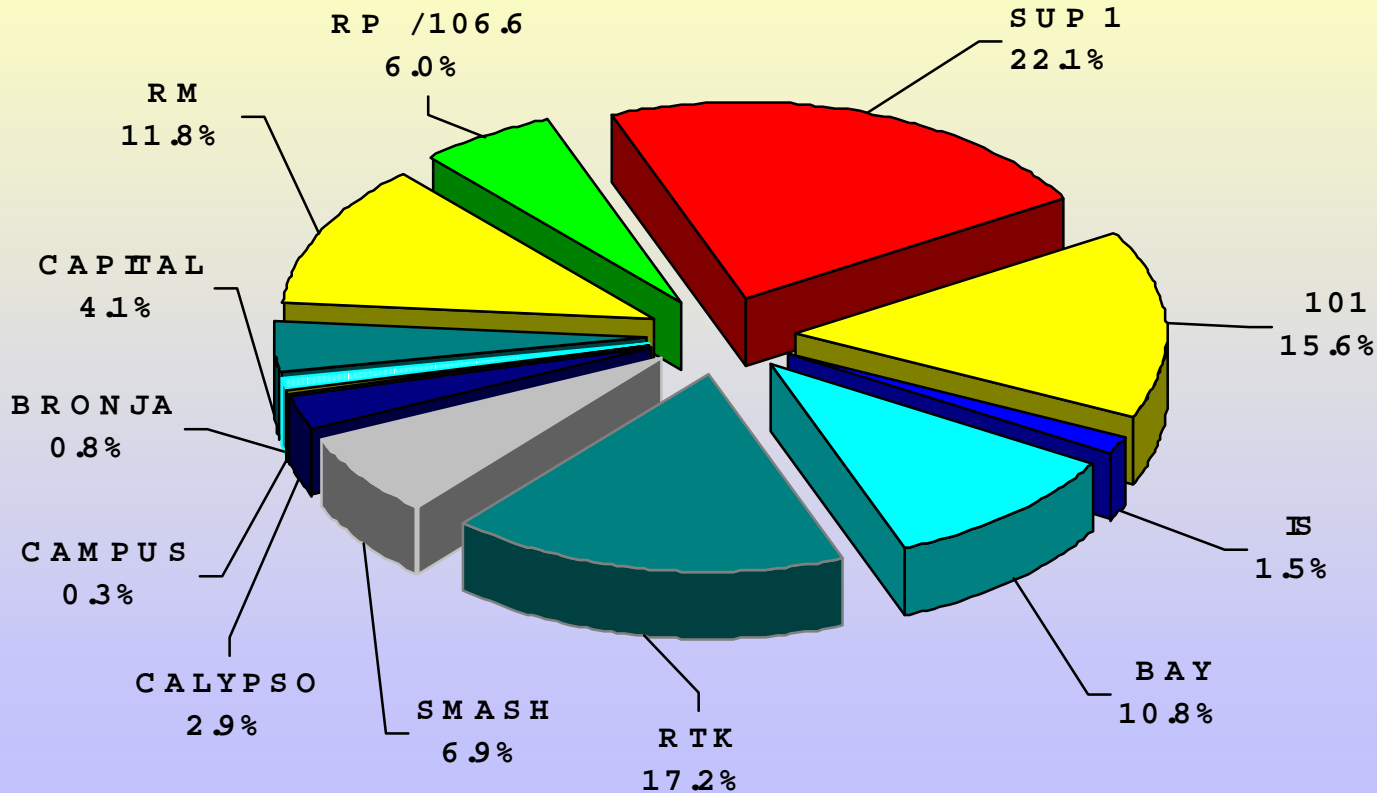


Meaning of %

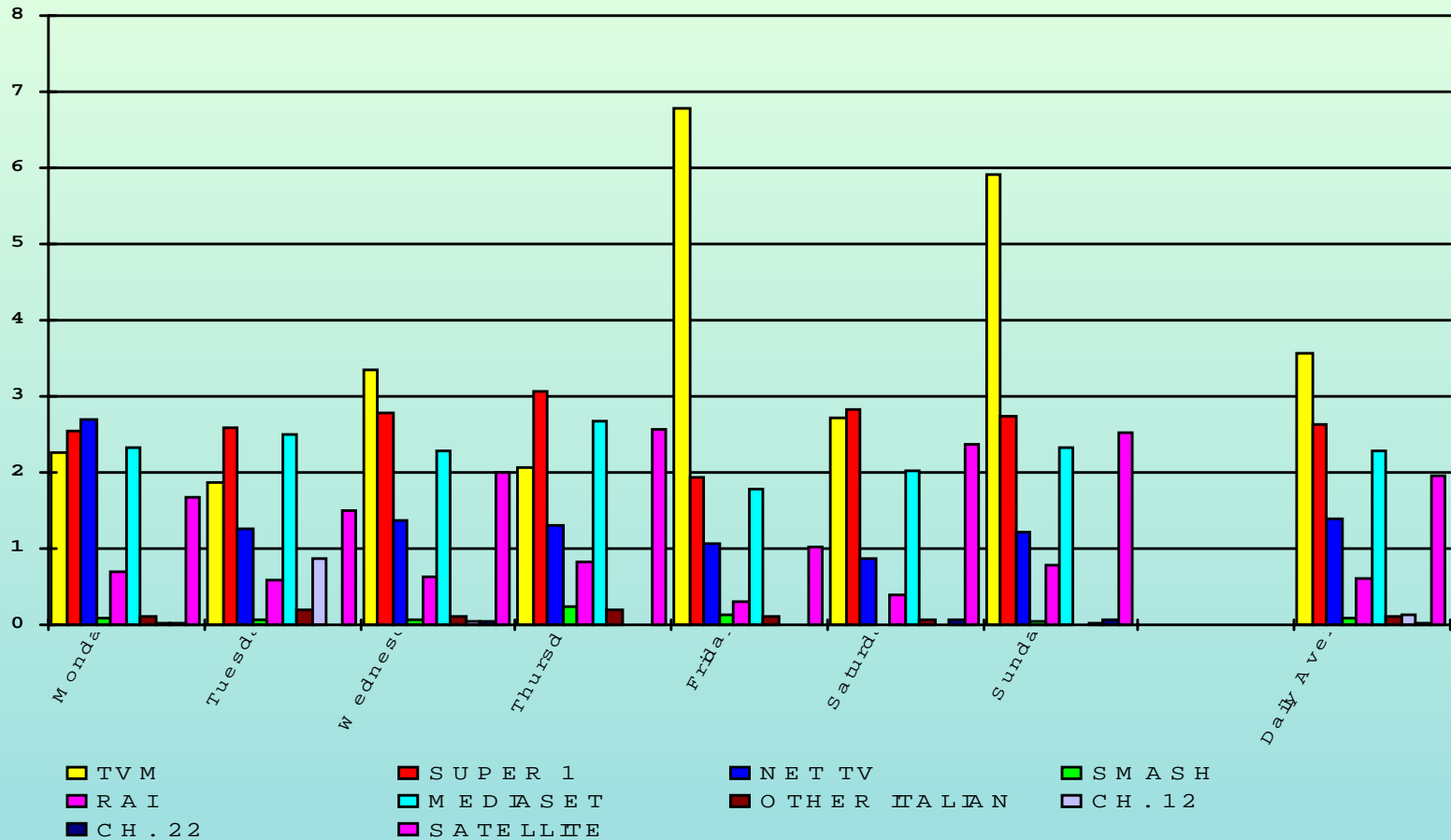
- ❑ The meaning of 1% in the following pie chart refers to the average share of audience for each time-slot if each time-slot were to be 'full to capacity'. They vary for EVERY STUDY.
- ❑ 2nd Quarter 2003
 - ❖ Radio:
 - All Available Slots: 1% = 305 persons
 - 6.00 – Midnight: 1% = 402 persons
 - ❖ TV:
 - B1: 1% = 106 persons
 - B2: 1% = 359 persons
 - B3: 1% = 1208 persons

BA Audience Audit April 2003

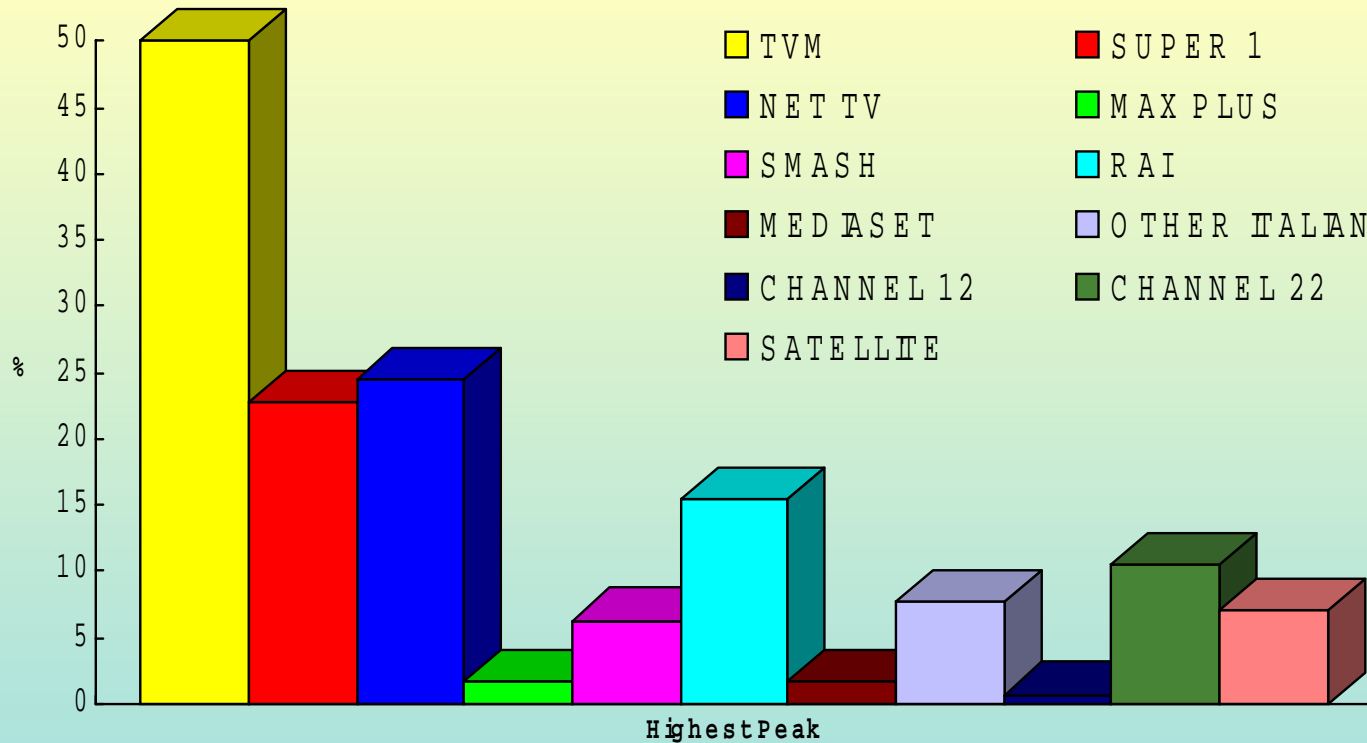
Daily Average Radio Audience Levels: 2nd Quarter 2003 (Basis: 6.00 a.m - Midnight)



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

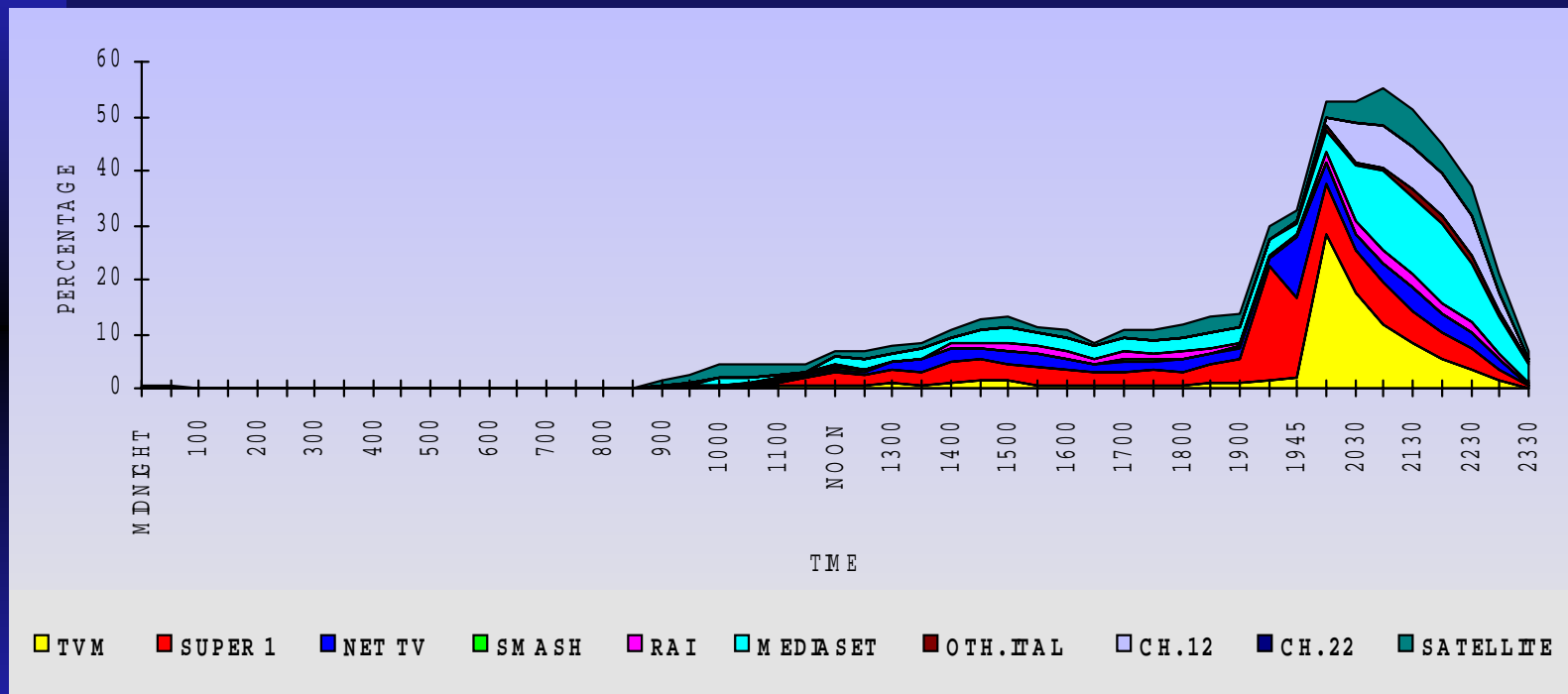


Highest TV Channel Peak Audience Share



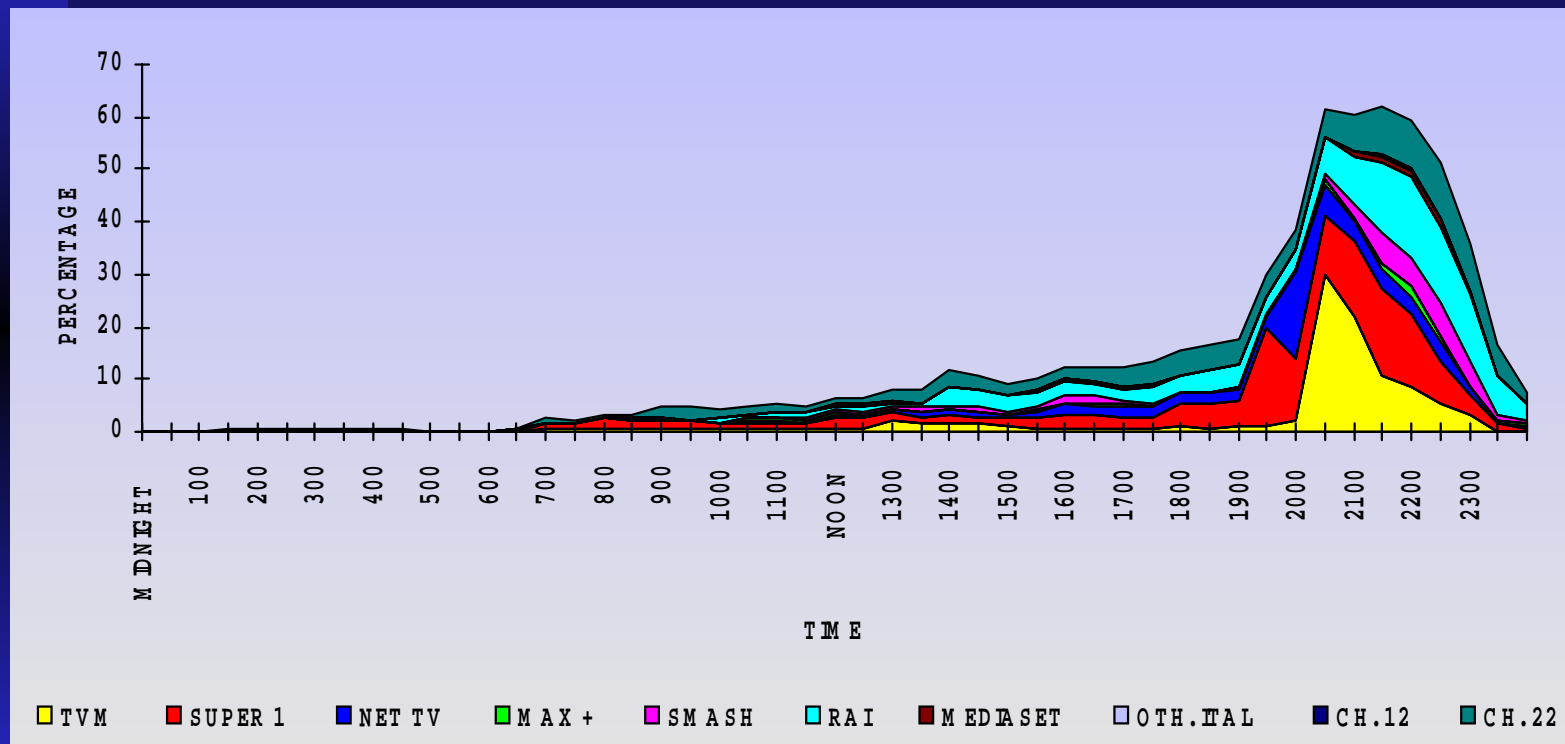


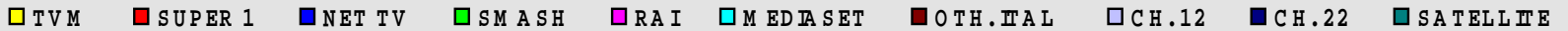
TV Viewing: Tuesday



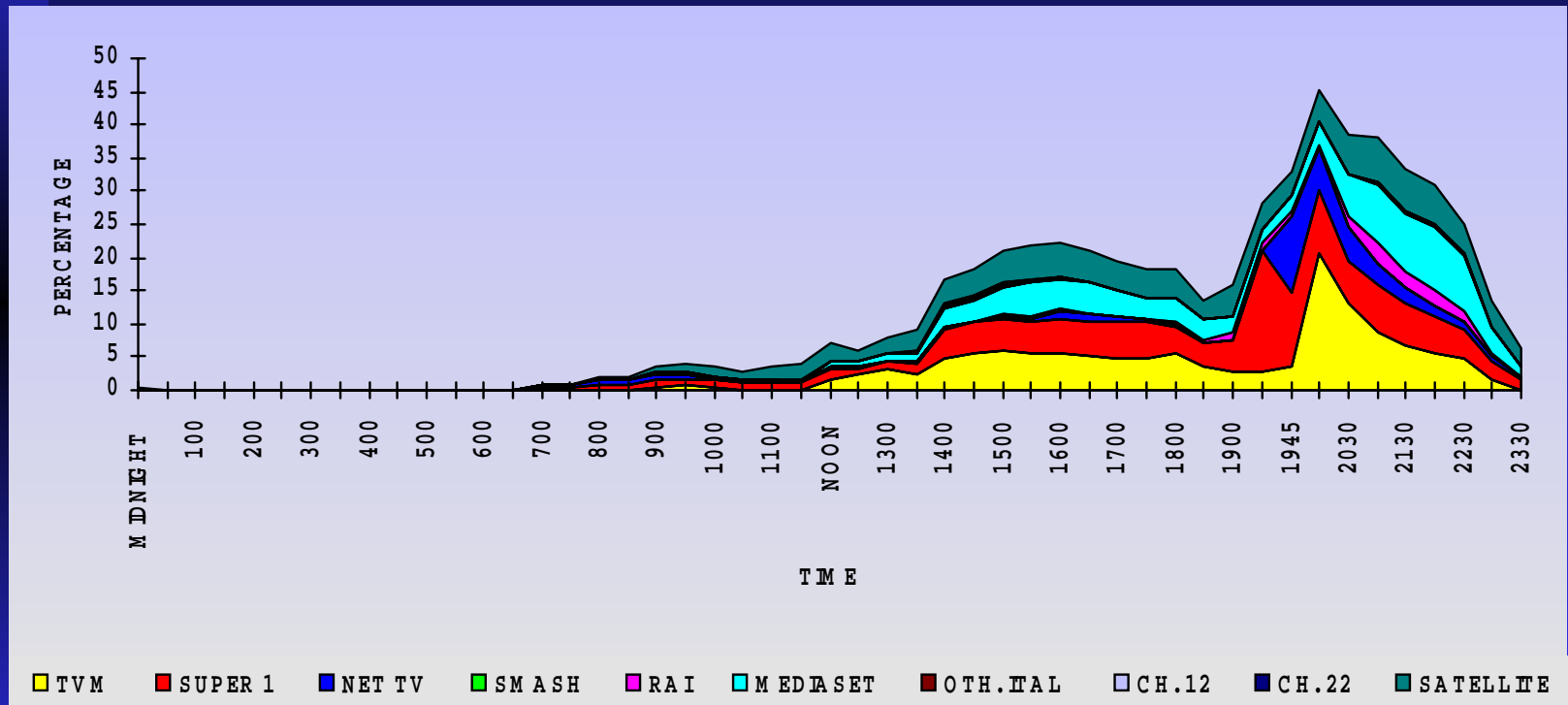


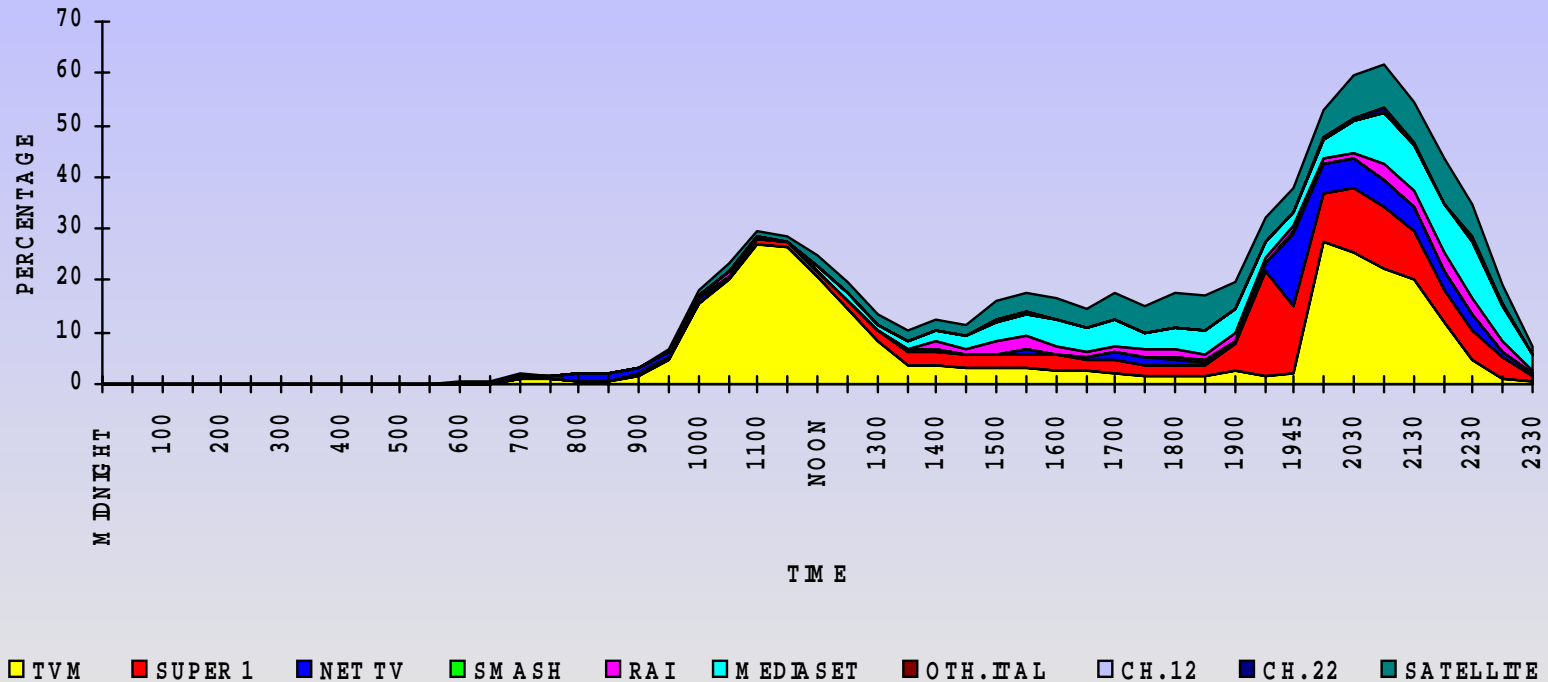
TV Viewing: Thursday

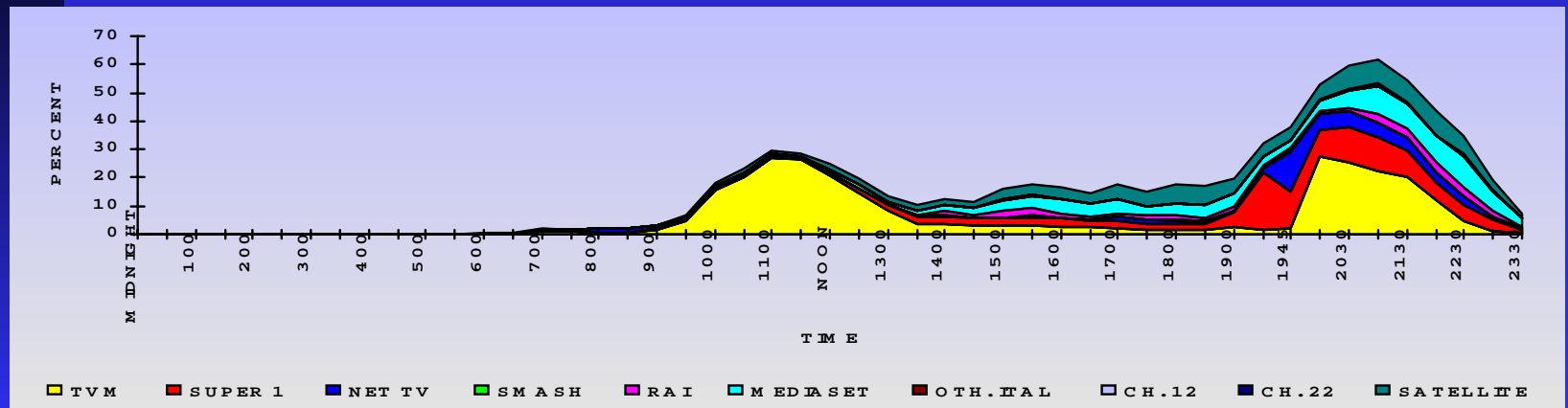
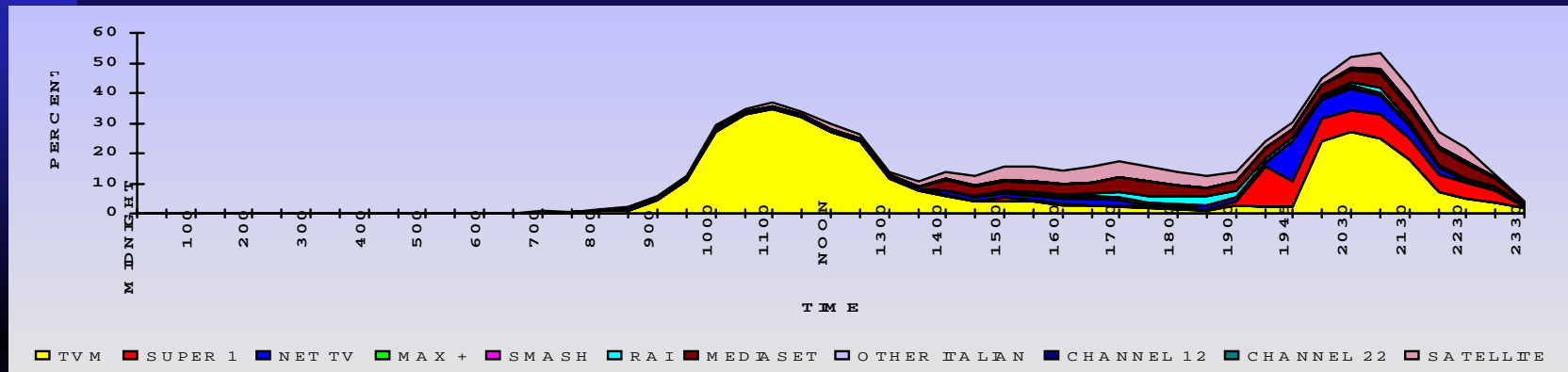




TV Viewing: Saturday

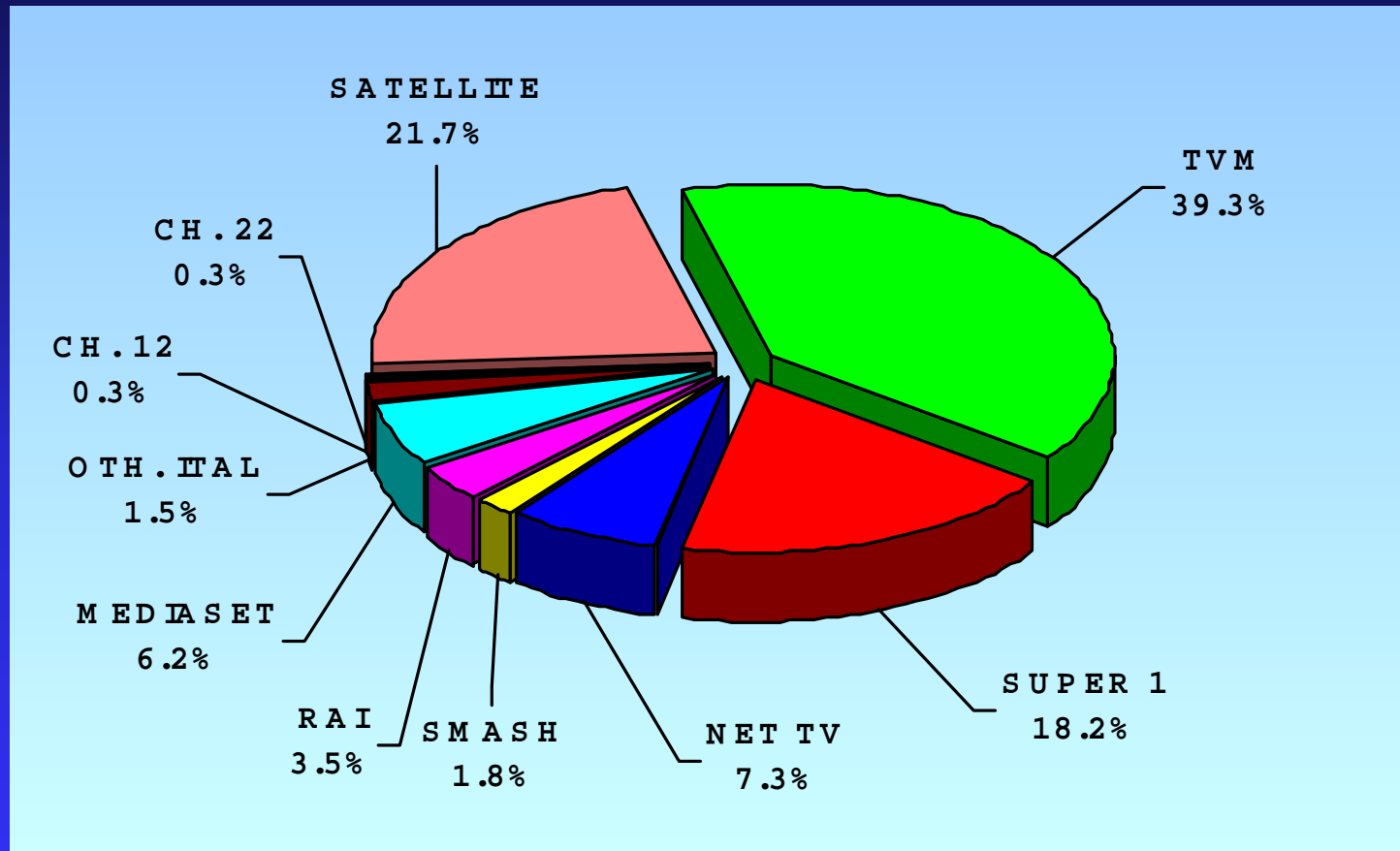






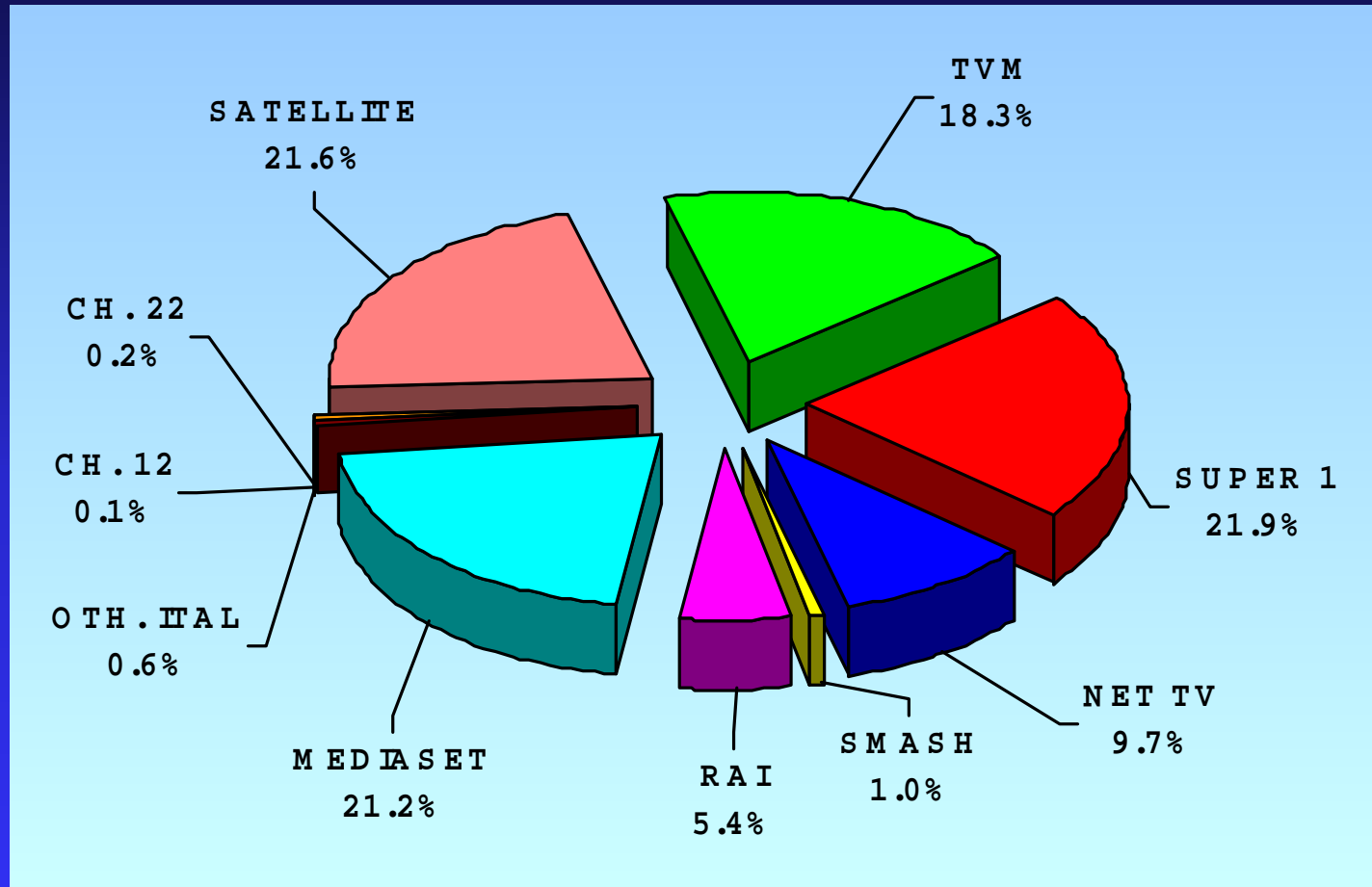
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



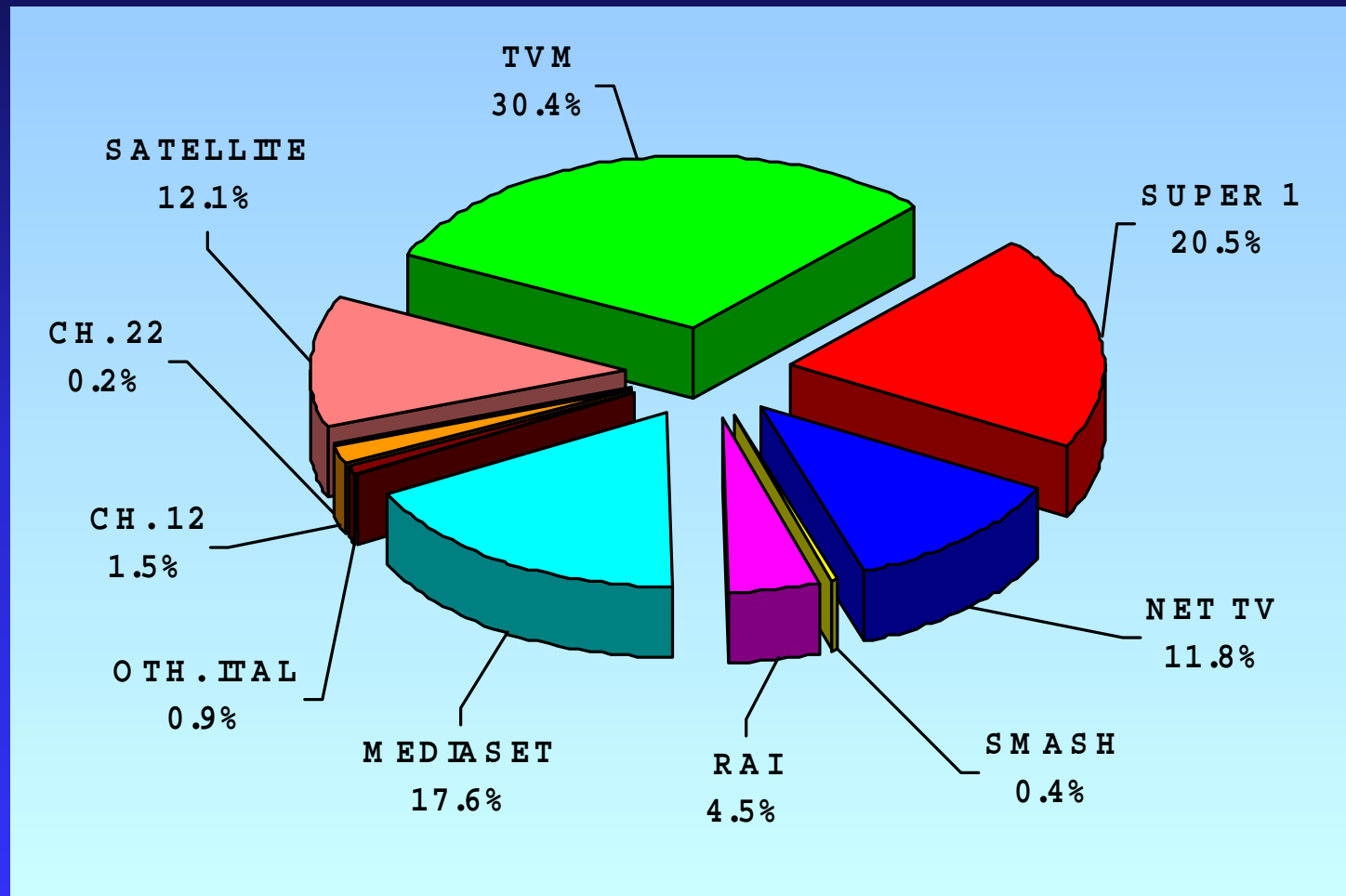
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



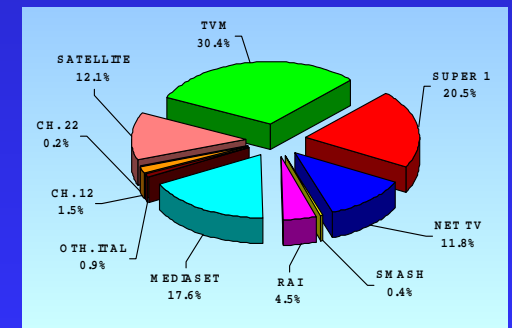
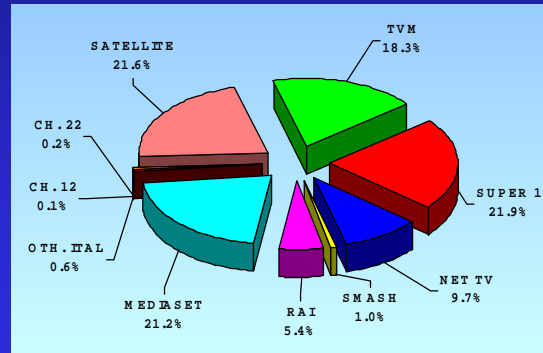
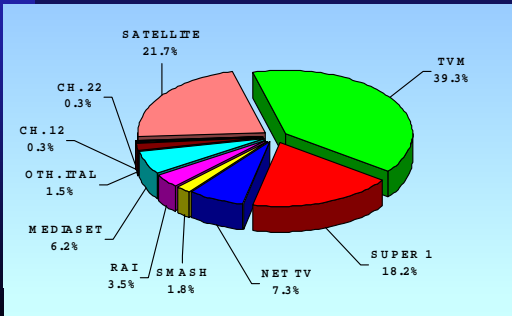
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



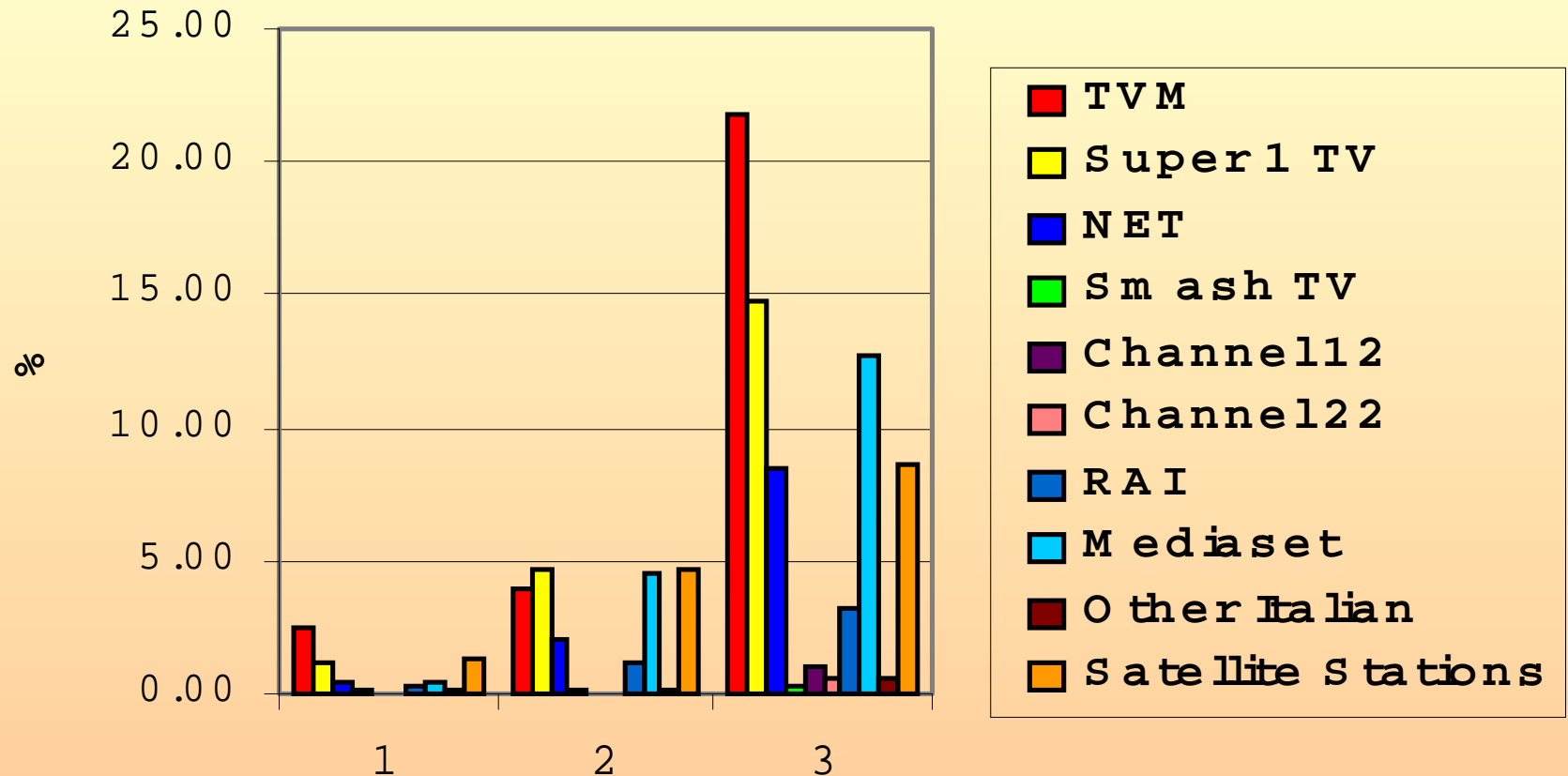
Daily Average TV Audience Levels

Time-Band Comparison



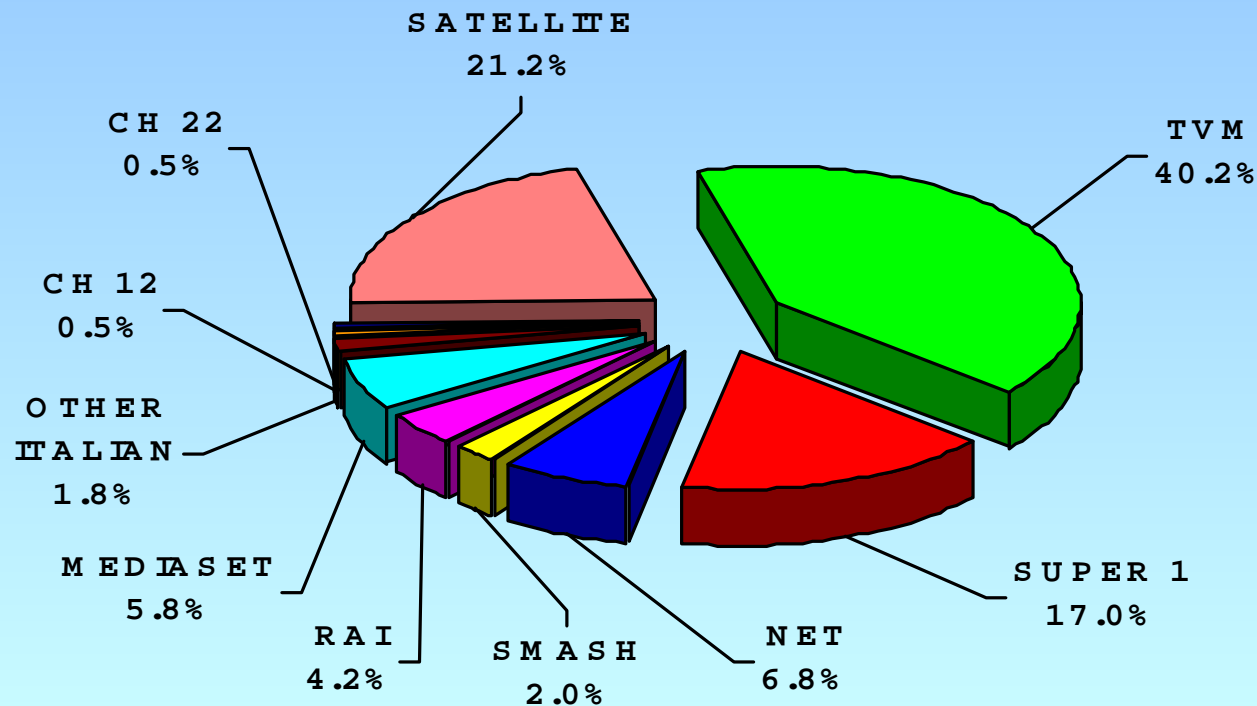
Daily Average TV Audience Levels

Time-Band Comparison in terms of Absolute Audience Size
2nd Quarter 2003



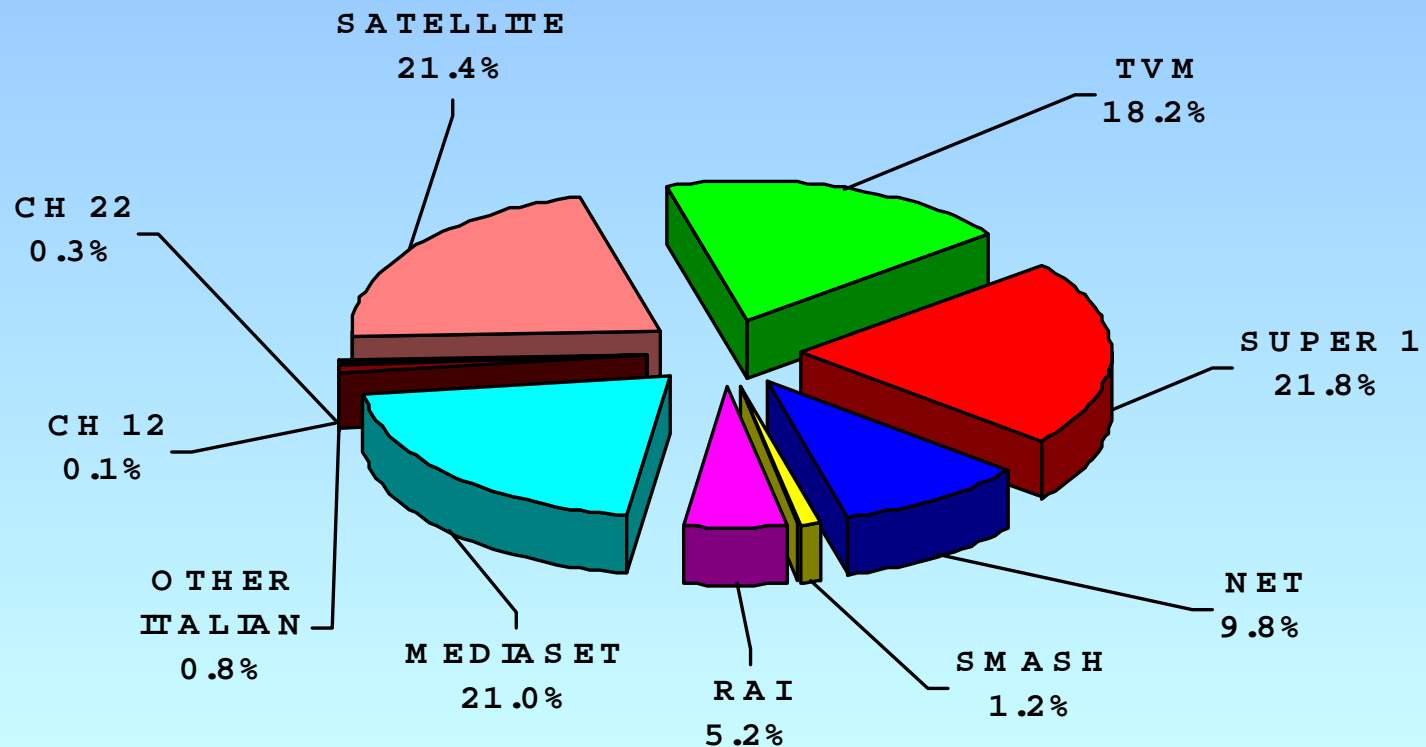
Daily Average TV Audience Levels

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



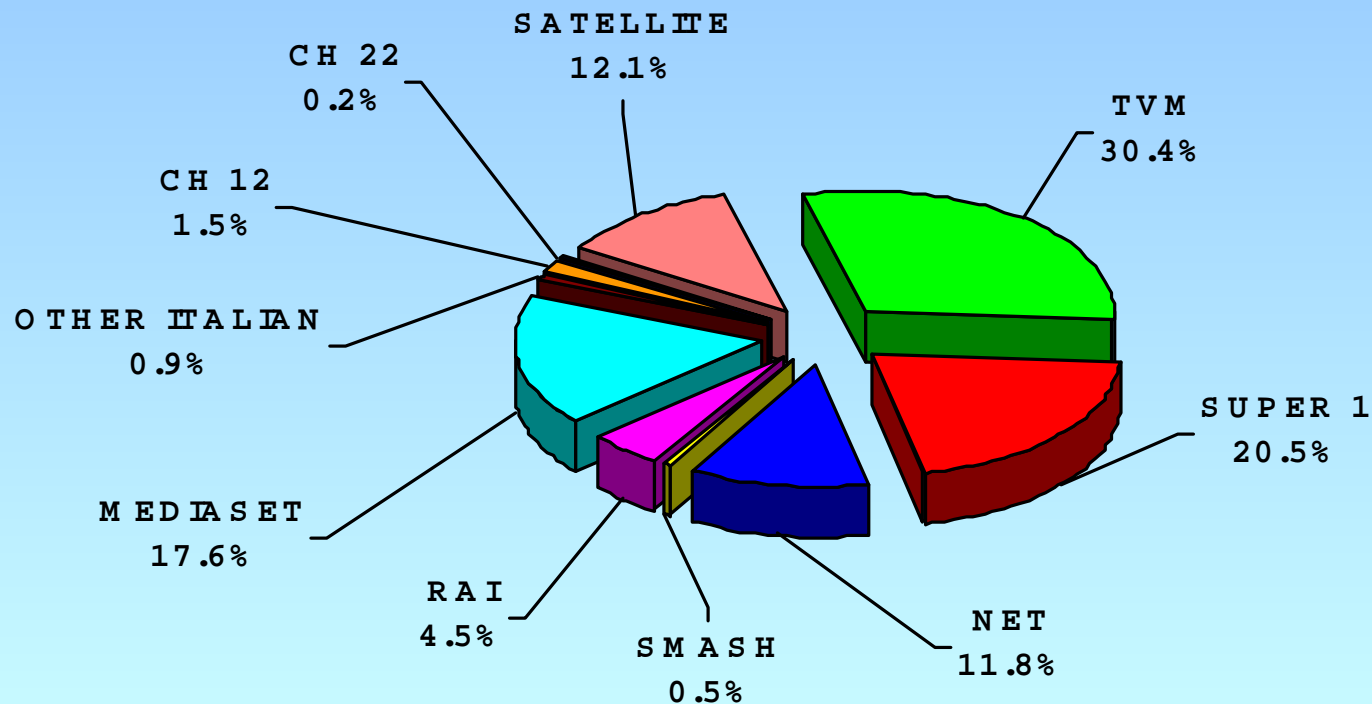
Daily Average TV Audience Levels

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	39.3	18.3	30.4
Super 1 TV	18.2	21.9	20.5
NET	7.3	9.7	11.8
Smash TV	1.8	1.0	0.4
Channel 12	0.3	0.1	1.5
Channel 22	0.3	0.2	0.9
RAI	3.5	5.4	4.5
Mediaset	6.2	21.2	17.60
Other Italian	1.5	0.6	0.9
Satellite Stations	21.7	21.6	12.1

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	40.2	18.2	30.4
Super 1 TV	17.0	21.8	20.5
NET	6.8	9.8	11.8
Smash TV	2.0	1.2	0.5
Channel 12	0.5	0.1	1.5
Channel 22	0.5	0.3	0.2
RAI	4.2	5.2	4.5
Mediaset	5.8	21.0	17.6
Other Italian	1.8	0.8	0.9
Satellite Stations*	21.2	21.4	12.1

Conclusions:

- ❑ Radio audiences are increasing in absolute size in respect of both April and November 2002.
- ❑ TV audience are growing in absolute size in all three time-bands in respect of April and November 2002

Radio Stations: Relative Strengths

6.00 a.m. - Midnight

- Super 1 – 22.1%
- RTK – 17.2%
- Radio 101 – 15.6%
- Radju Malta – 11.8%
- Bay Radio – 10.8%
- Smash – 6.9%
- Radju Parlament – 6.0%
- Capital – 4.1%
- Calypso – 2.9%
- Island Sound – 1.5%
- FM Bronja – 0.8%
- Campus FM – 0.3%

Source for News

- Main source remains TV
- Music & Local News are the two programme segments that generate most interest on radio
- Local News Foreign & 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* on TVM and *F'Bahar Wiehed* on NET TV.
- *Xarabank* remains the programme with the highest audience level throughout
- *Tista' Tkun Int!* and *UC5* are the second and third most popular TV programmes

Trends in TV Audiences

- ❑ TVM has the largest audiences in Time Bands 1 & 3
- ❑ Super 1 is second best station
- ❑ TVM has the largest audience in absolute terms with *Xarabank*.
- ❑ Super 1 TV has the largest audience share in Time Band 2
- ❑ NET TV's *F'Bahar Wiehed* is the station's strongest programme

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 2003

