

TV & Radio Audiences in Malta

Broadcasting Authority

4th 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

- **06:00 hrs – Noon**
- **Noon – 19:00 hrs**
- **19:00 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	20.9	21.2	20.5
31-50	37.2	37.3	37.0
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	78.4	74.4
Do Not Listen to the Radio	23.7	21.6	25.6

Average Number of Hours Radio is Listened to

	Total	Male	Female
N=	764	384	380
	%	%	%
Varies Considerably	0.7	0.3	1.1
One Hour	33.1	38.0	28.2
Two Hours	16.6	15.9	17.4
Three Hours	12.6	10.2	15.0
Four to Nine Hours	33.6	32.0	35.1
Ten Hours and more	4.1	3.6	3.2

Where is Radio Listened to

	Total	Male	Female
N=	764	384	380
	%	%	%
NA	0.8	0.8	0.8
At home	70.8	57.3	84.5
At work	19.4	30.5	8.2
In the car	36.0	48.4	23.4

Who watches TV

	Total	490	511
N=	1001	490	511
	%	%	%
Watch TV	99.3	99.4	99.2
Do Not watch TV	0.7	0.6	0.8

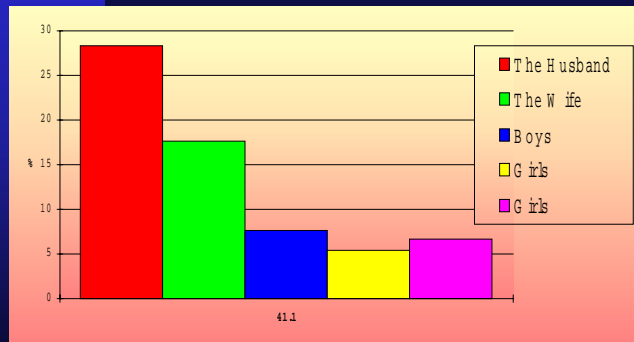
Average No. of Hours TV is watched

	Total	Male	Femal e
N=	981	487	507
	%	%	%
Varies Considerably	0.1	-	0.2
One Hour	14.8	15.2	14.4
Two Hours	29.1	29.8	28.4
Three Hours	26.6	26.9	26.2
More than three Hours	27.4	28.1	30.8

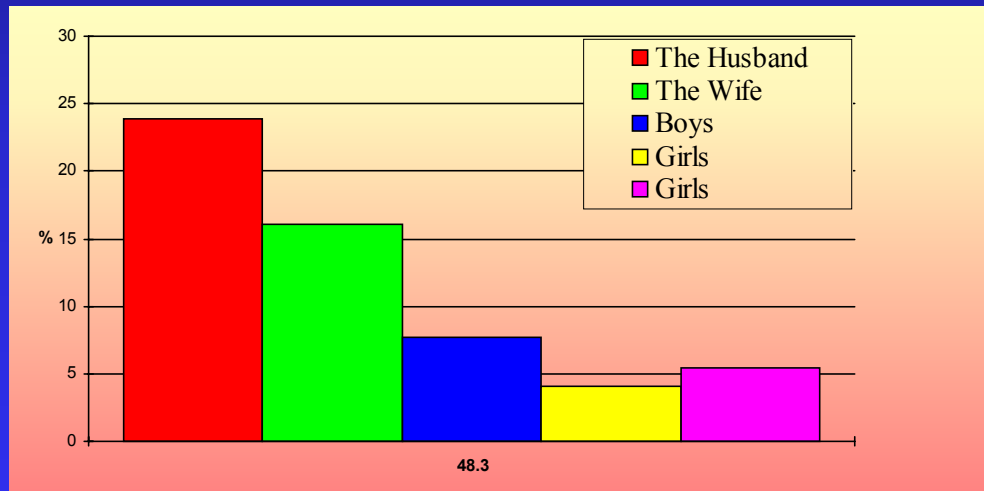
Where TV is Watched

	Total	Male	Female
N=	981	487	507
	%	%	%
Sitting Room	50.3	48.3	52.3
Dining Room	3.4	4.5	2.4
Kitchen	20.5	17.2	23.7
Bedroom	24.6	28.1	21.3
Another Place	1.1	1.8	0.4

Who decides on Choice of Channel (2002 - 2003)



4th Quarter 2002



4th Quarter 2003

Mode of Receiving TV Signal

Base= All

	Total	AB	C1	C2	DE
N=	1001	147	296	249	309
	%	%	%	%	%
Roof Antenna	31.7	22.4	26.7	38.2	35.6
Cable	69.1	78.9	73.0	61.8	66.7
Satellite	14.0	15.6	16.6	13.7	11.0

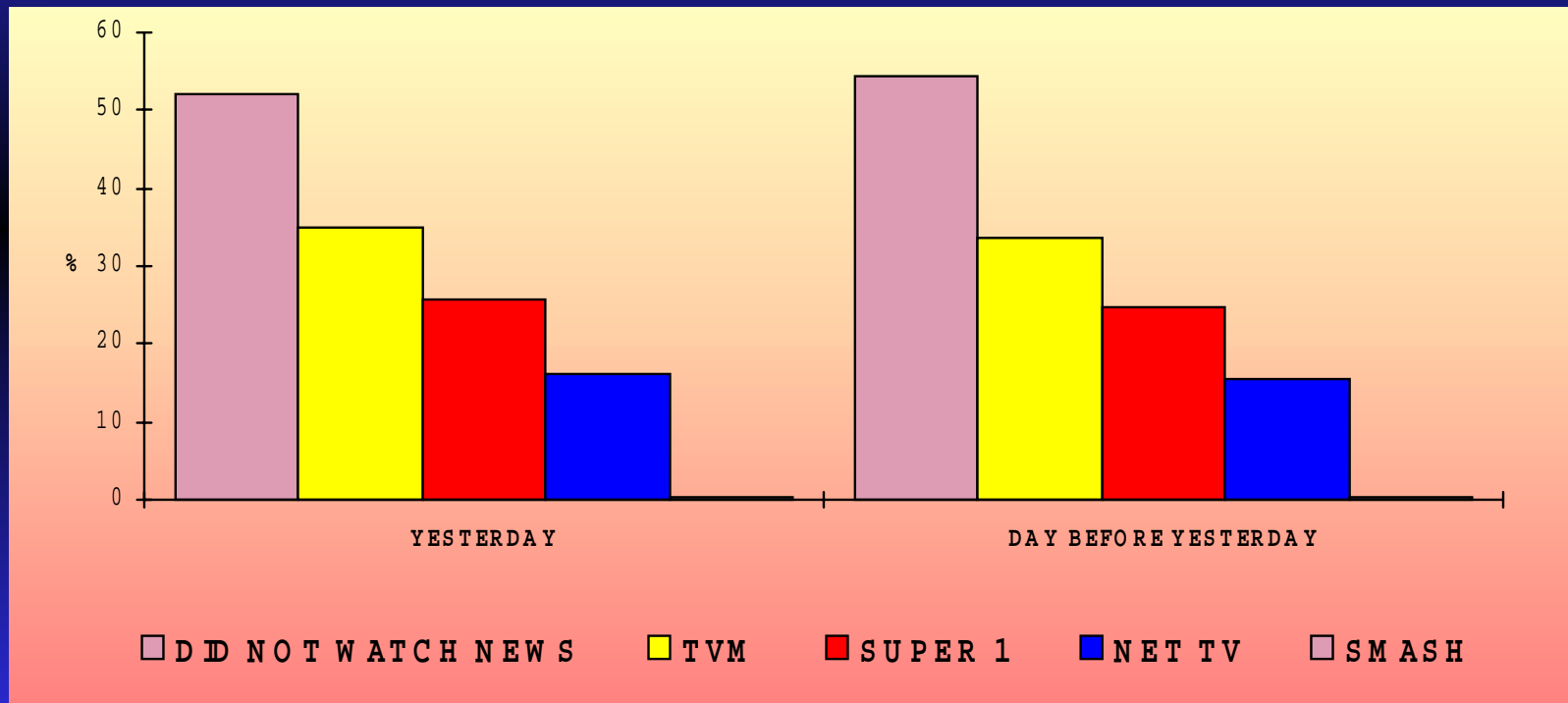
Preferred Source for Local News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	0.9	0.6	1.2
Radio	8.7	8.0	9.4
TV	81.6	82.7	80.6
Newspaper	6.2	6.1	6.3
From Other Persons	2.6	2.7	2.5

Preferred Source for Foreign News

	Total	Male	Female
N=	1001	490	511
	%	%	%
No Preference	1.8	1.6	2.0
Radio	6.8	5.9	7.6
TV	82.5	85.9	84.5
Newspaper	4.3	4.5	4.1
From Other Persons	1.9	2.0	1.8

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



General Preference for Programme Sectors (Radio: 4nd Quarter 2003)

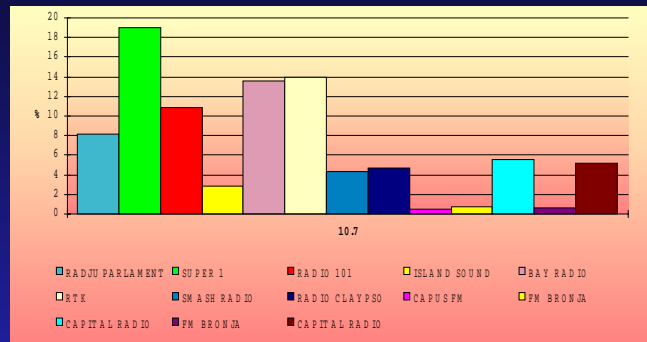
	2003 4th Quarter
Music	85.6
Local News	74.6
Foreign News	72.9
Discussions on Personal Problems	52.4
Current Affairs	40.7
Health/Beauty/Home/Law	39.5
Religion	38.5
Women's Programmes	32.7
Culture	29.8
Sports	28.8
Novels/Plays	28.3
Money/Business	15.6
Children	13.4

General Preference for Programme Sectors

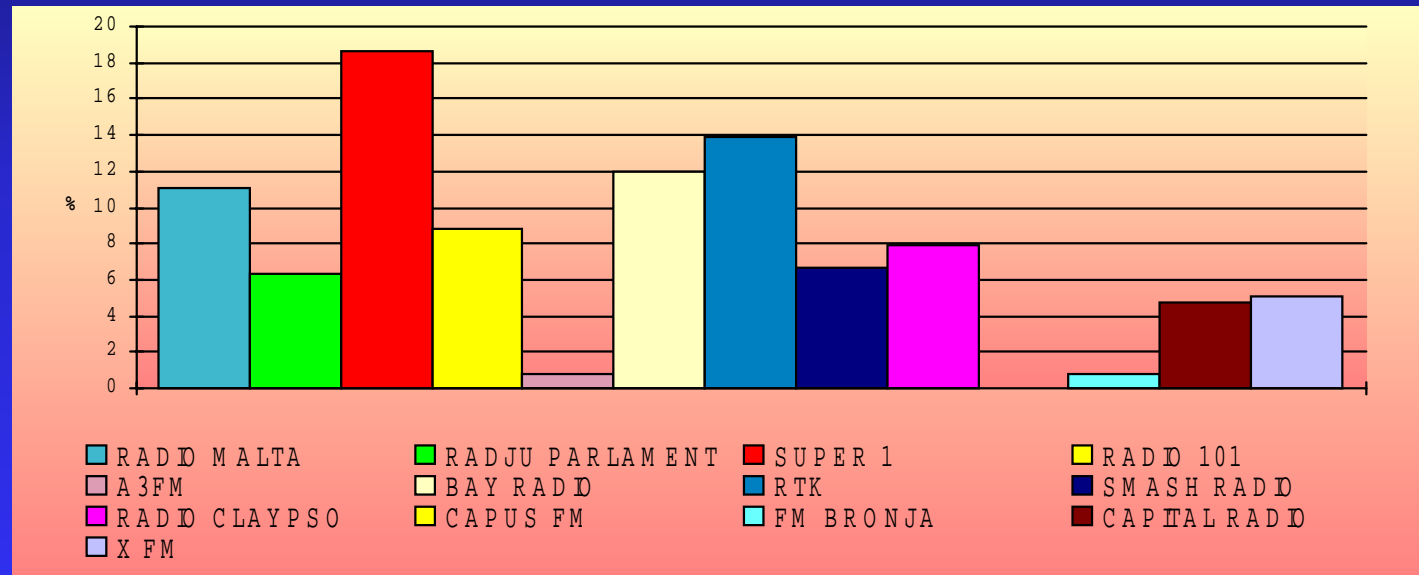
(TV: 2003 – 4th Quarter)

PROGRAMME SECTOR	2003 4th Quarter
Foreign News	94.8
Local News	94.0
Discussions	77.4
Weather	76.0
Documentaries	70.2
Feature Films	70.6
Serials/Soap Operas	60.5
Sports	59.6
Women's Programmes	53.2
Plays	51.6
Quizzes/Game Shows/Variety Progr.	51.6
Current Affairs	49.2
Religion	44.4
Art & Culture	29.8
Children's Programmes	29.8
Music Video-Clips	21.8
Business & Finance	21.0

Overall Performance as 'Best' Radio Station

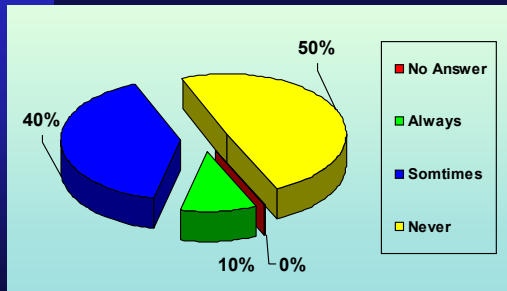


4th Quarter 2002



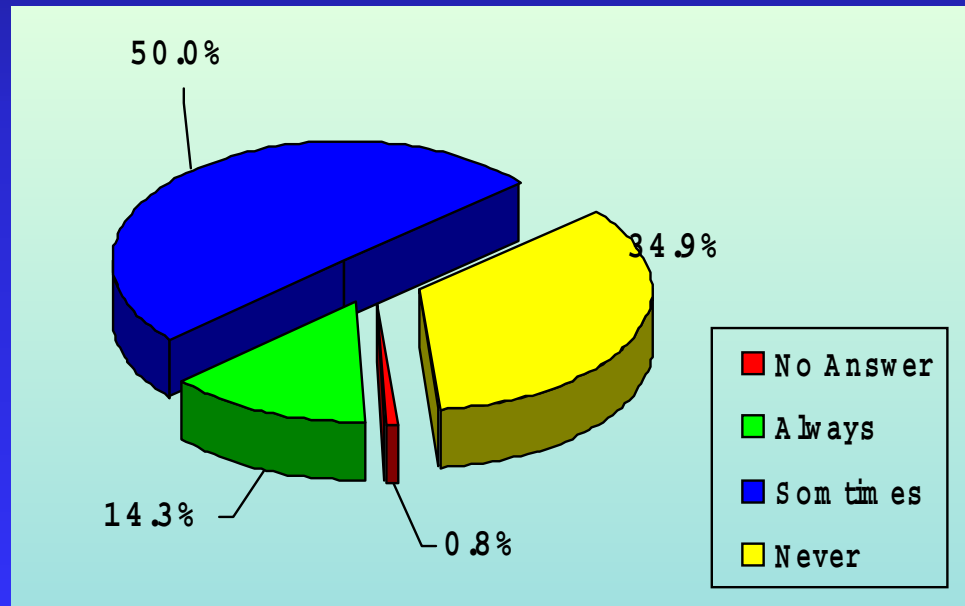
4th Quarter 2003

Interest in Political Broadcasts (1999 – 2001)



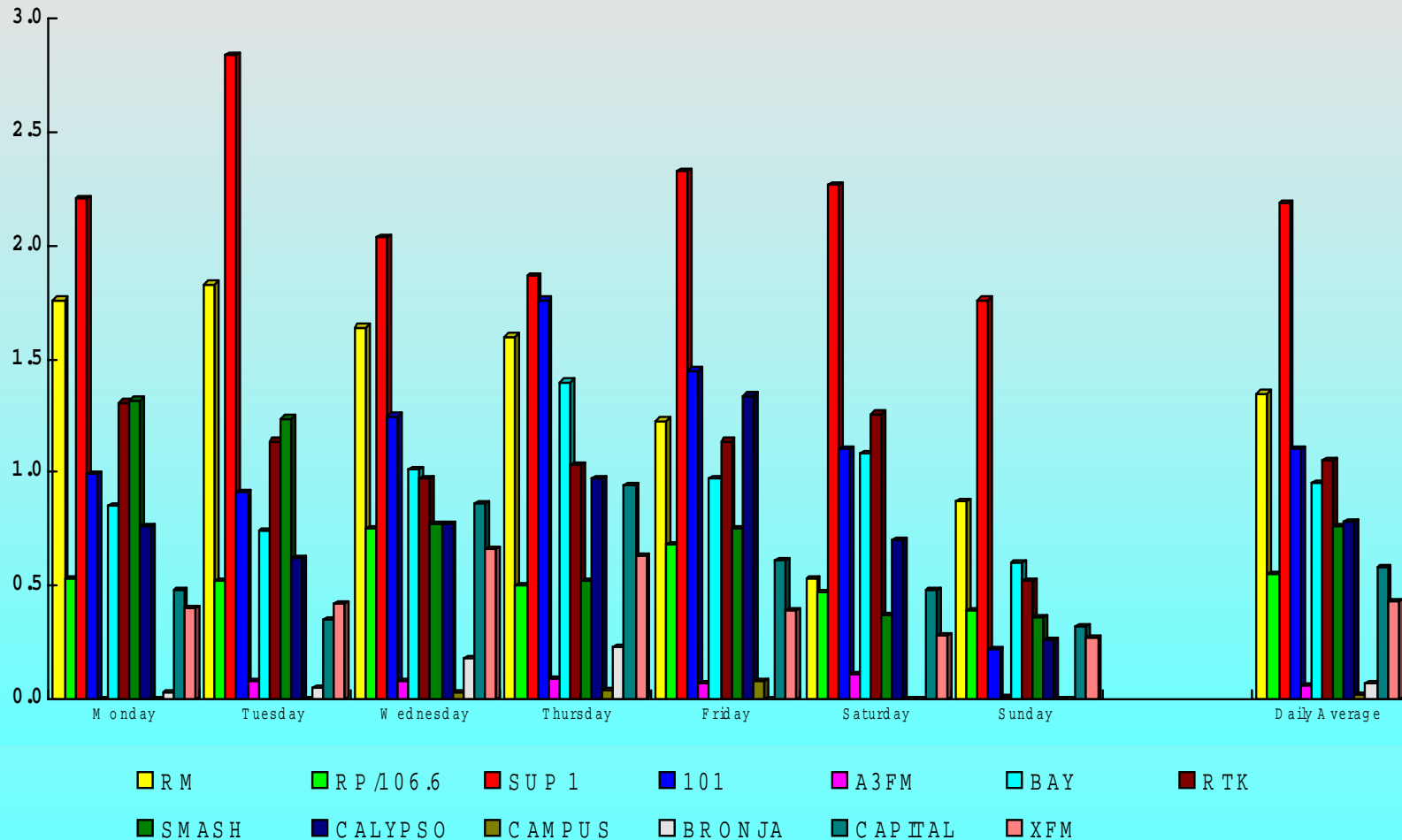
4th Quarter 2002

4th Quarter
2003

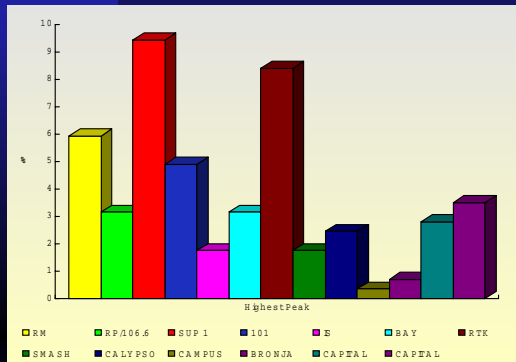


Daily Radio Average Audience Share

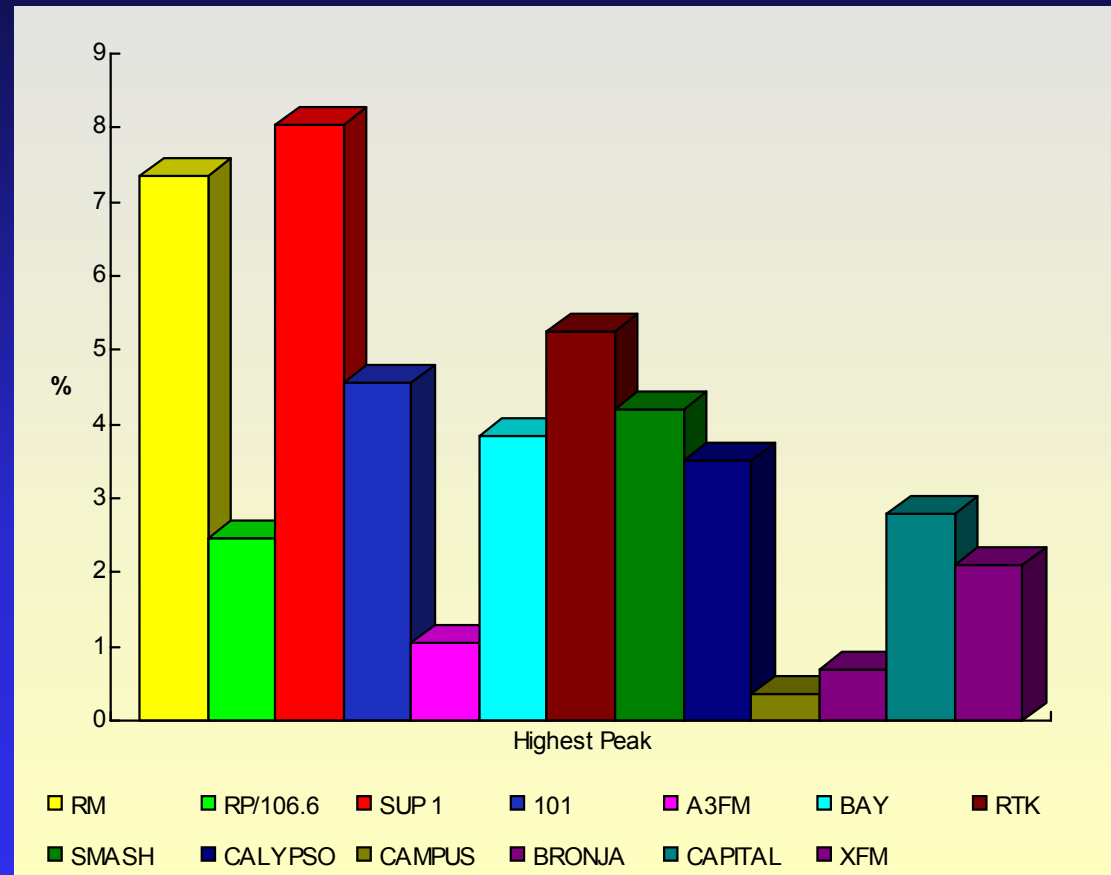
(Basis: Total No. of Transmission Hours)



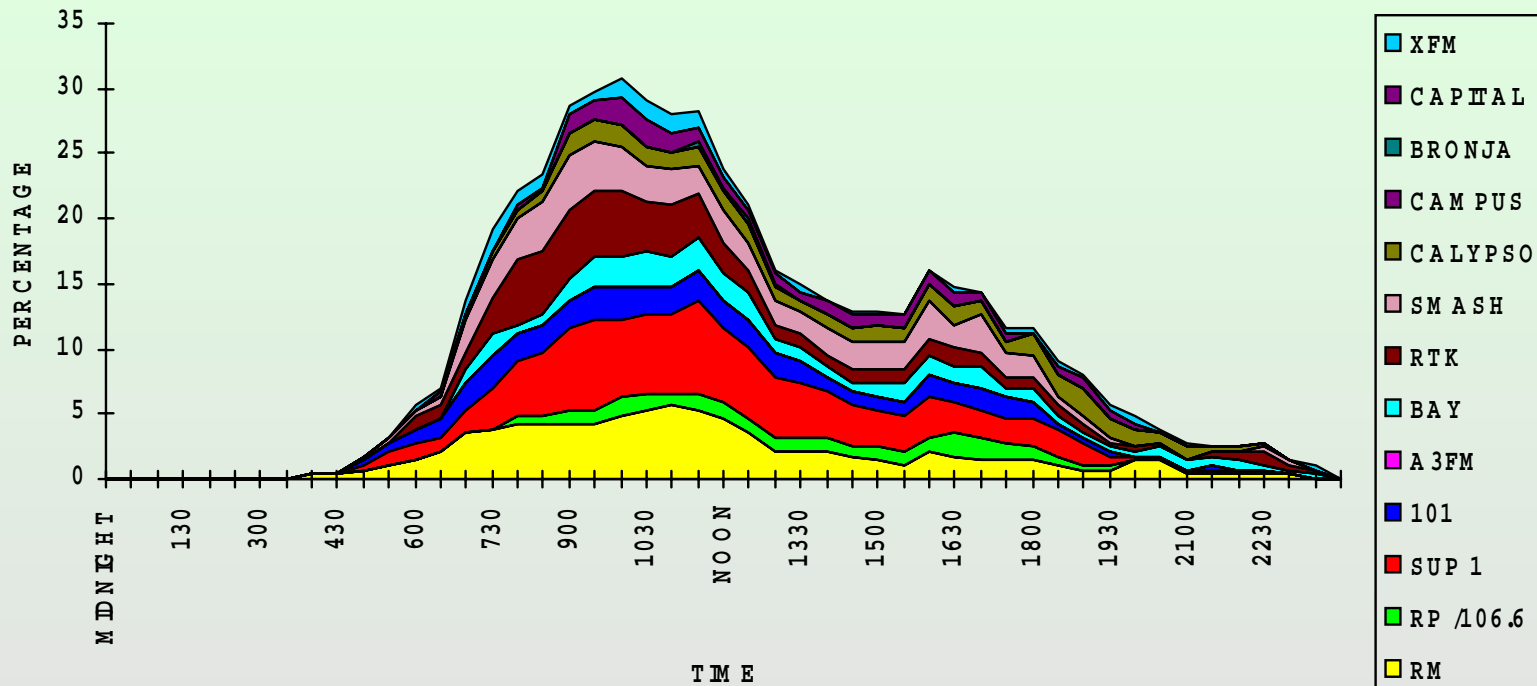
Highest Radio Station Peak Audience Share

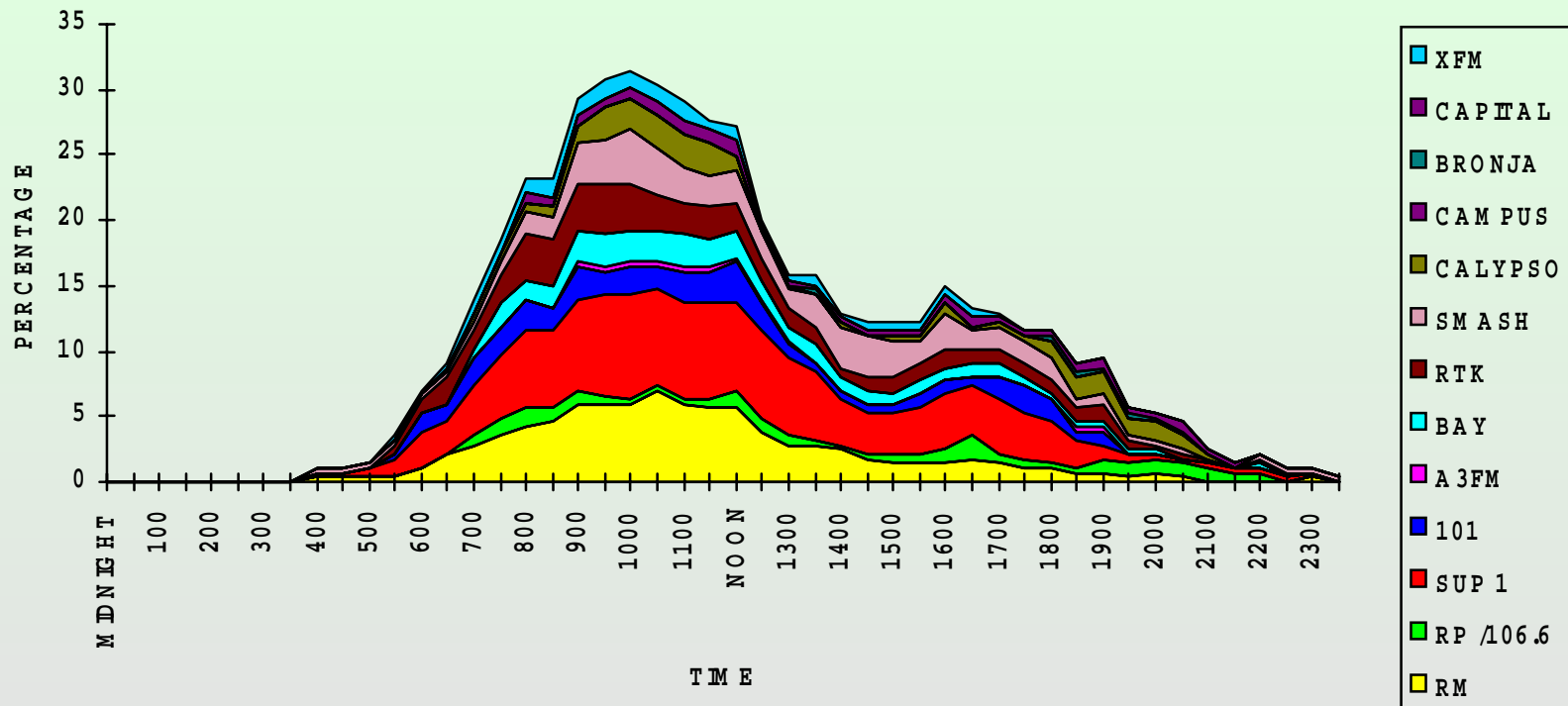


4th Quarter
2002

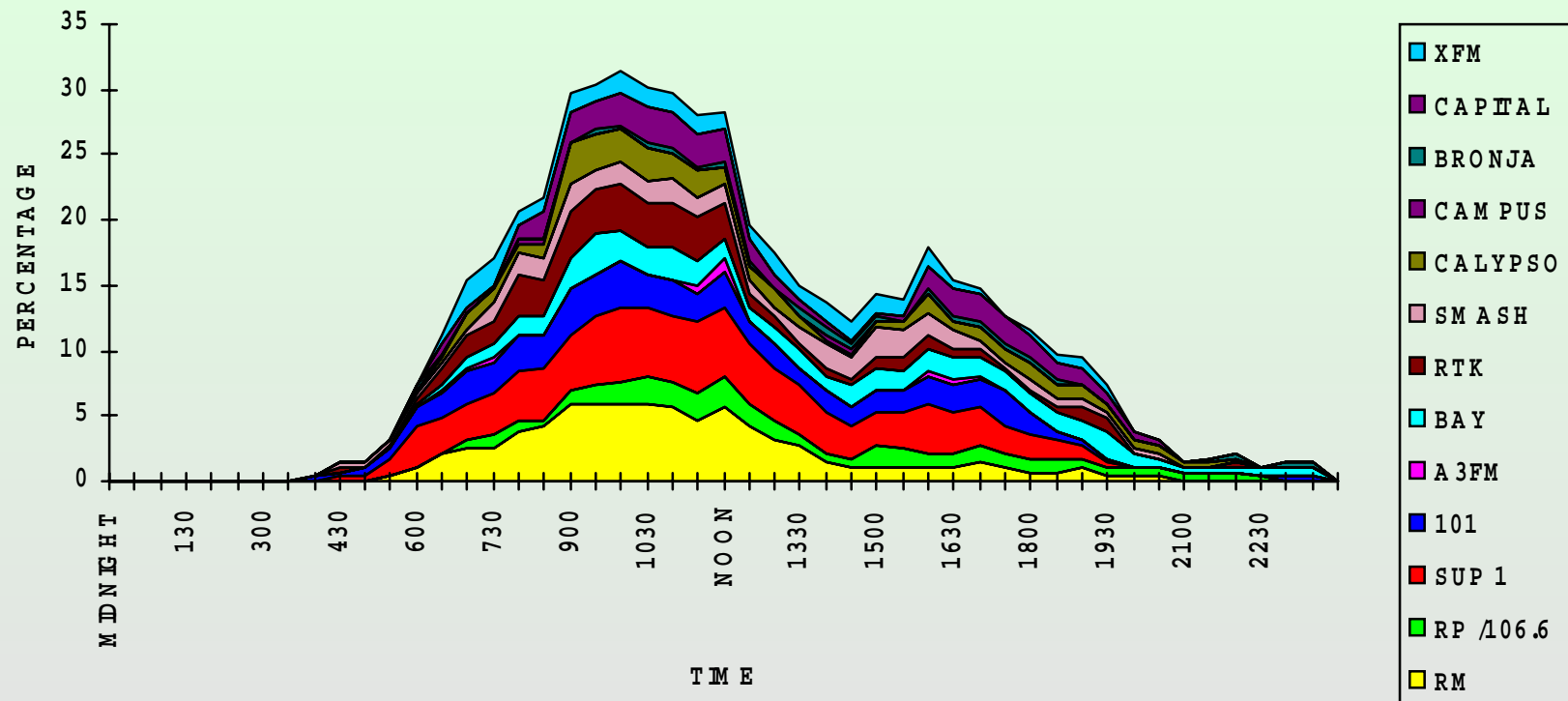


4th Quarter 2003

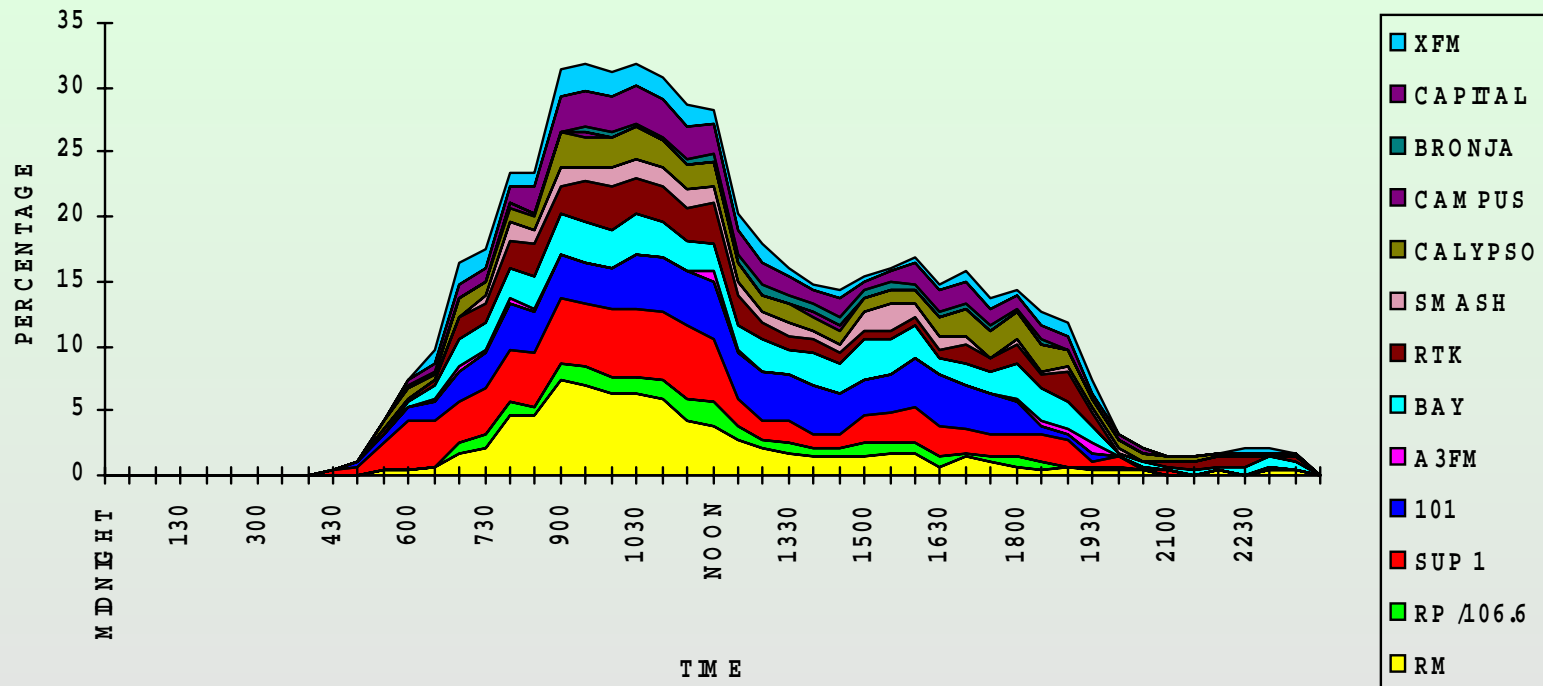




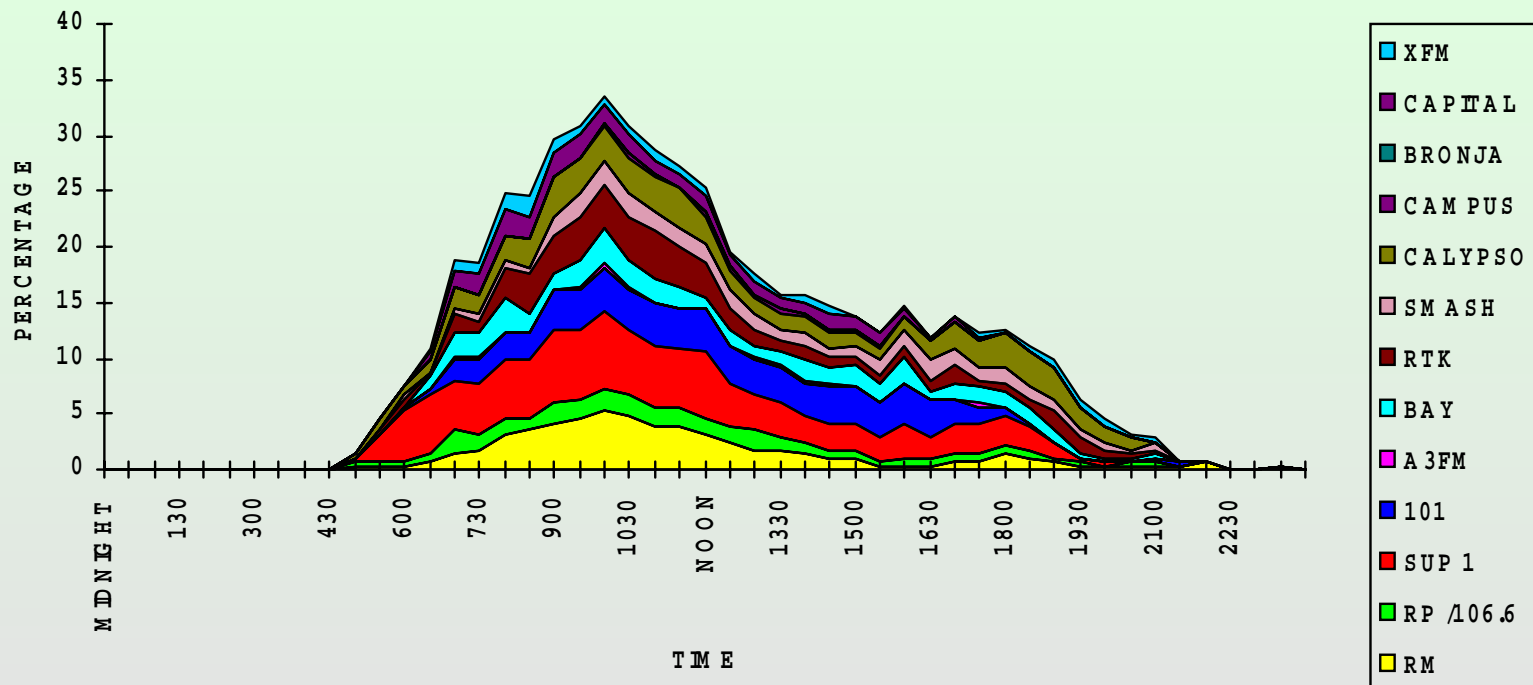
Radio Audiences: Wednesday

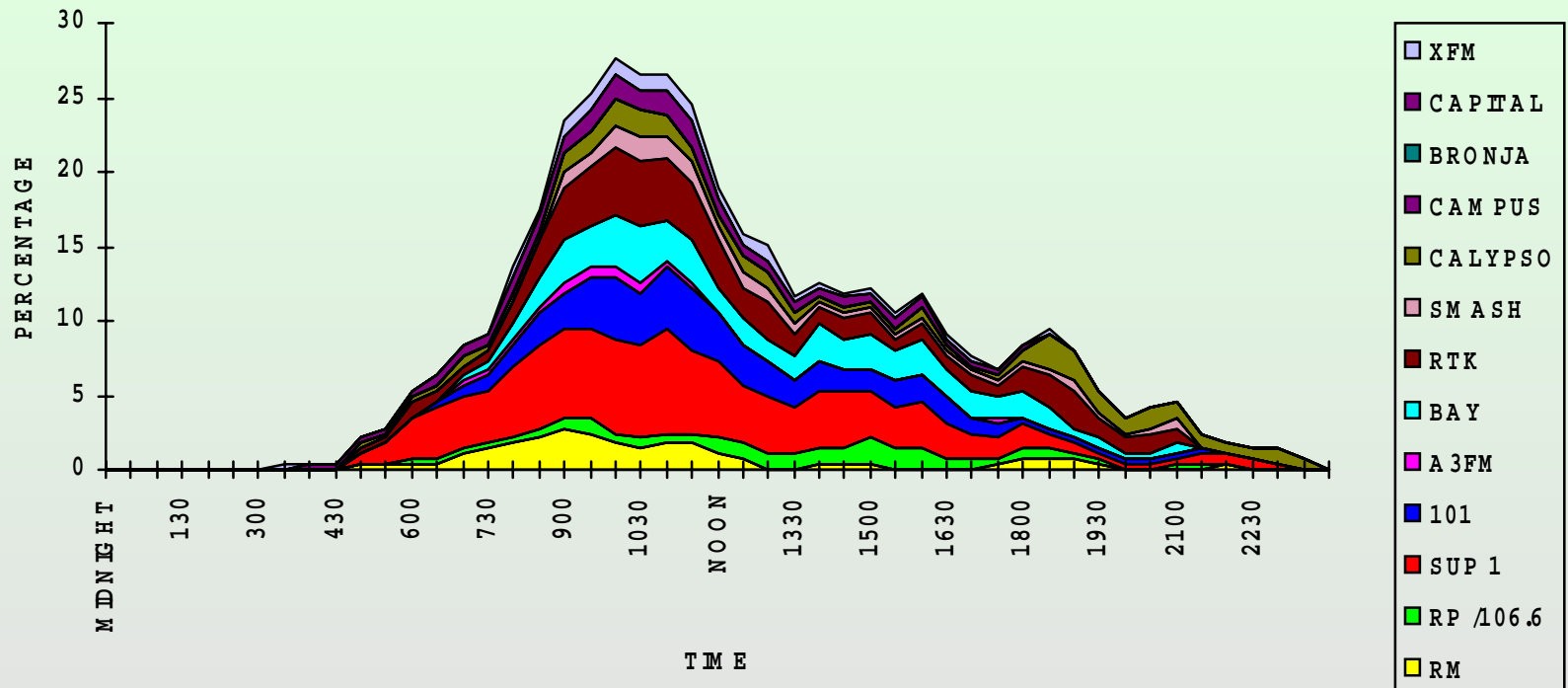


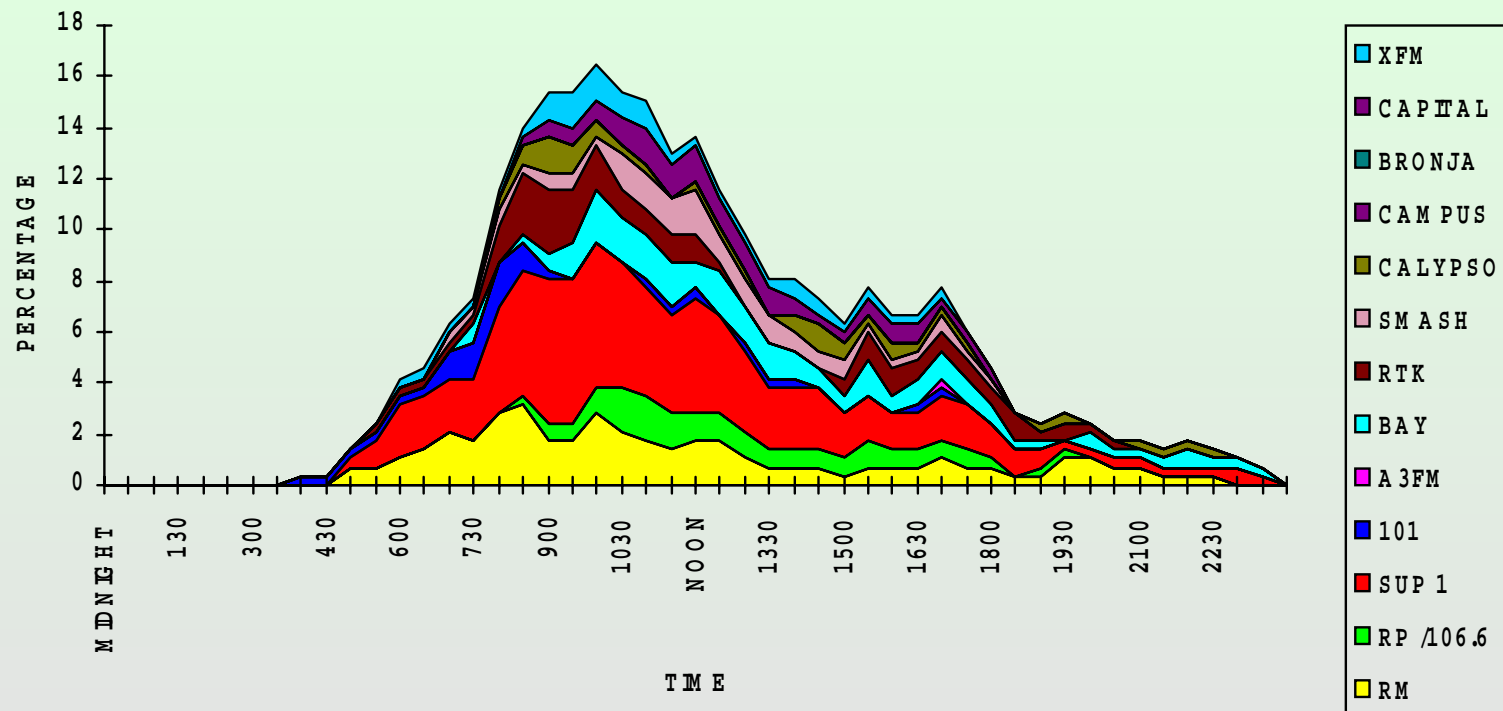
Radio Audiences: Thursday



Radio Audiences: Friday







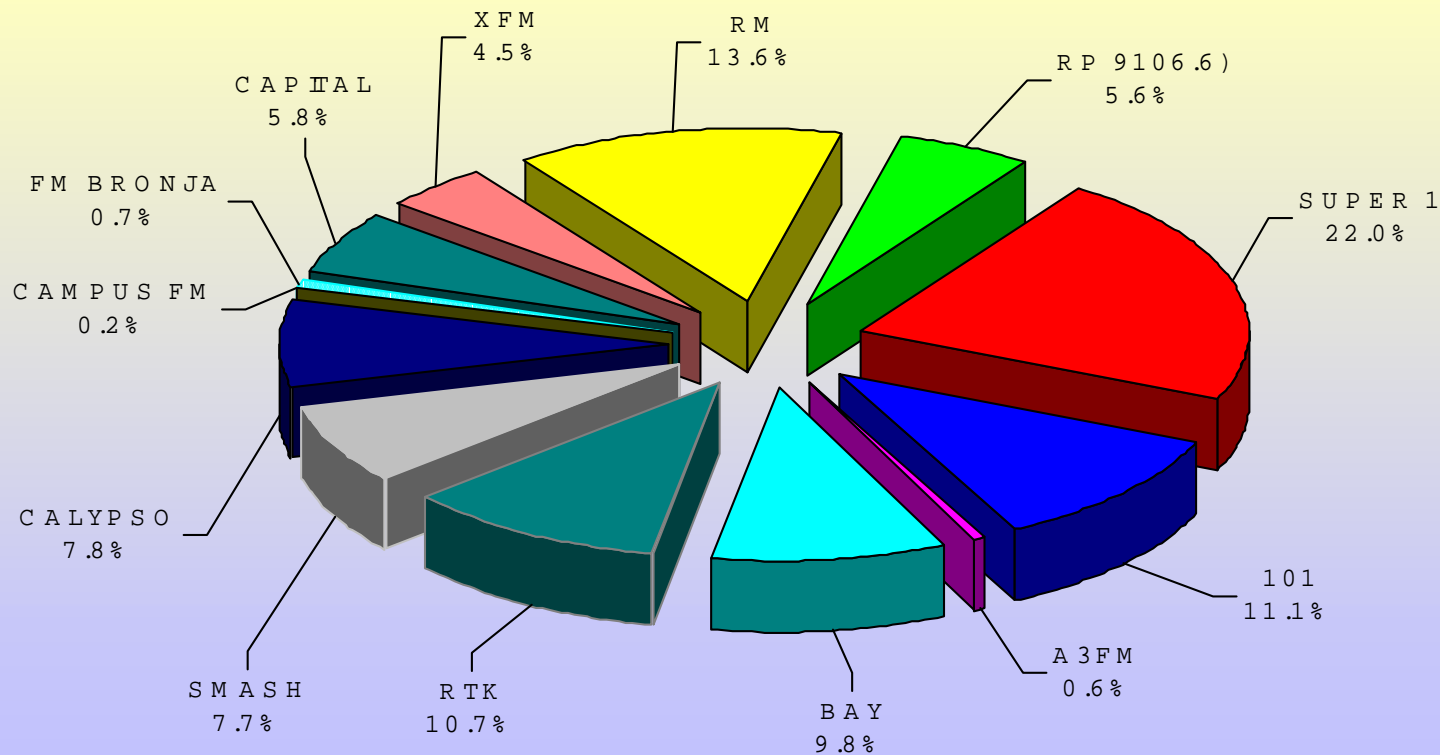
Meaning of %

- ❑ 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.
- ❑ 4th Quarter 2003
 - ❖ Radio:
 - All Available Slots: 1% = 285 persons
 - 6.00 – Midnight: 1% = 408 persons
 - ❖ TV:
 - B1: 1% = 105 persons
 - B2: 1% = 357 persons
 - B3: 1% = 1171 persons

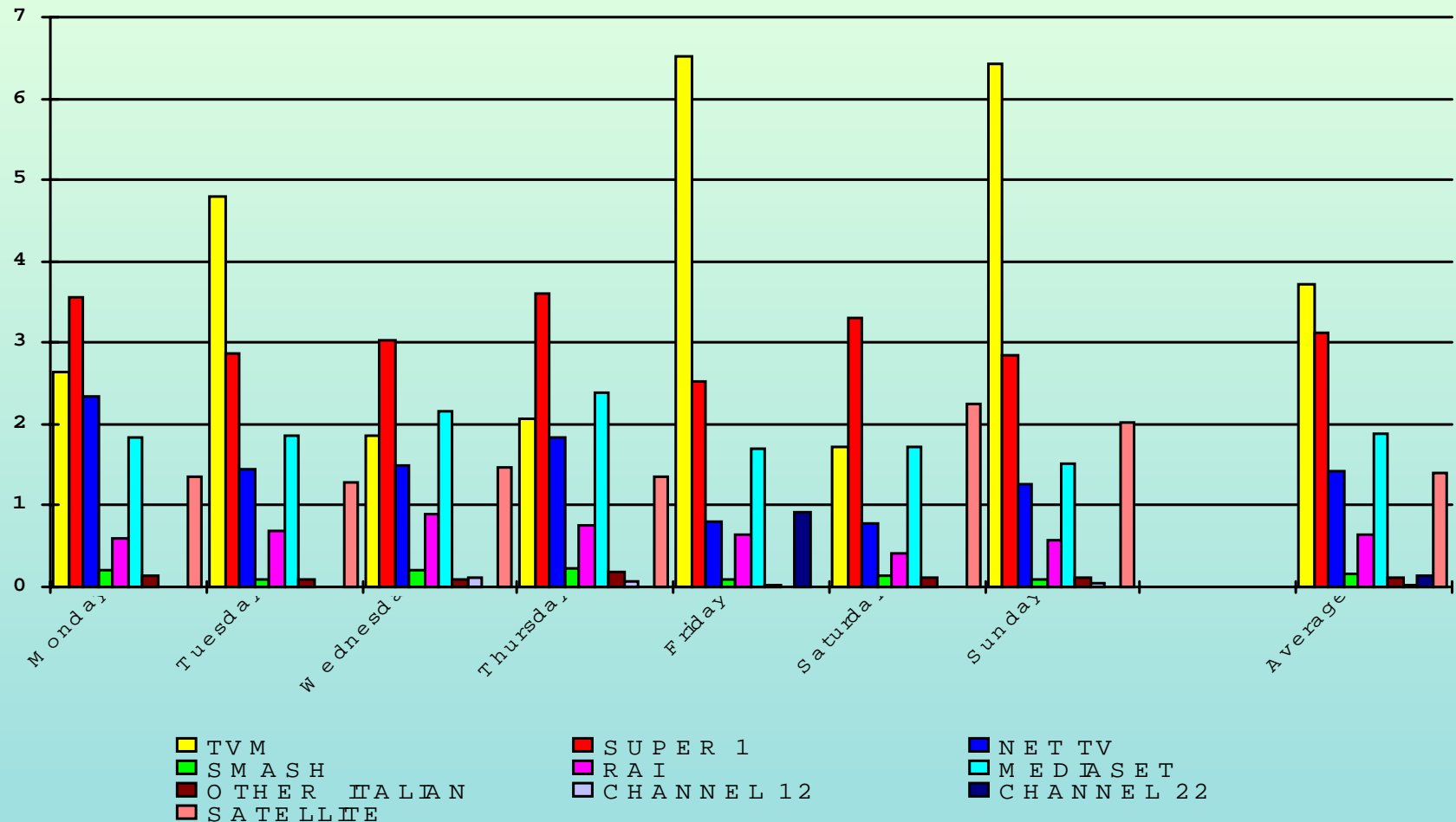
BA Audience Audit 4th Quarter 2003

Daily Average Radio Audience Levels: 4th Quarter 2002

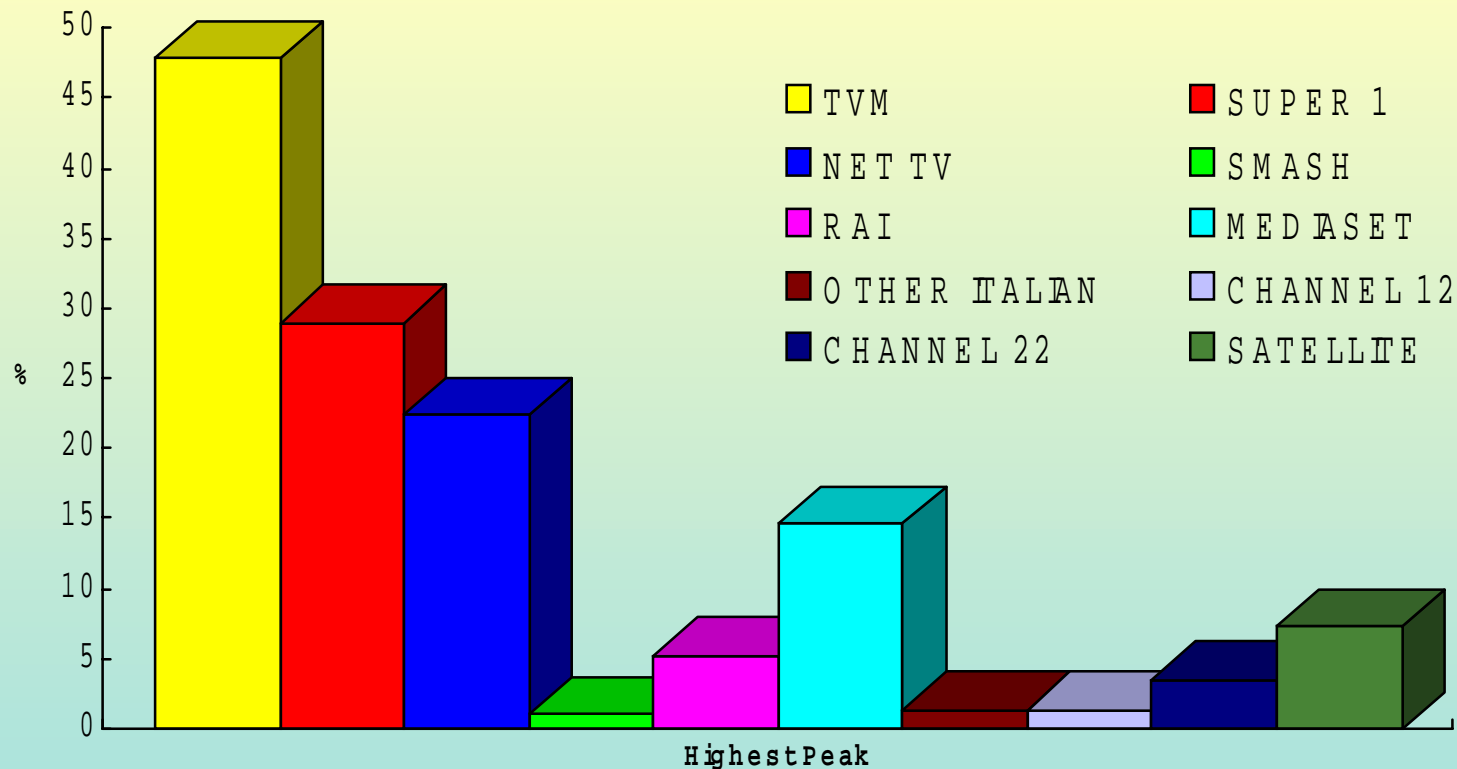
(Basis: 6.00 a.m - Midnight)



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



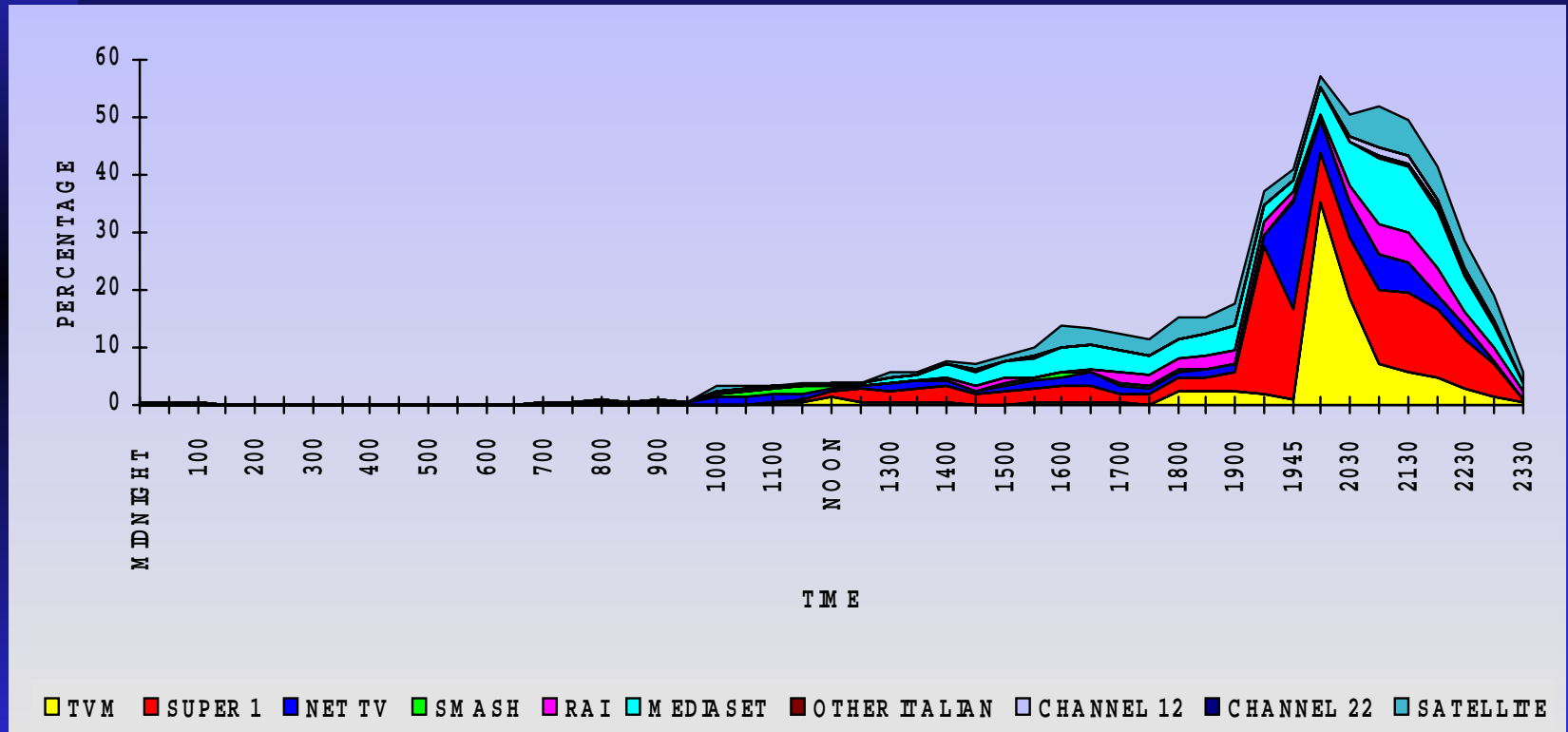
Highest TV Channel Peak Audience Share



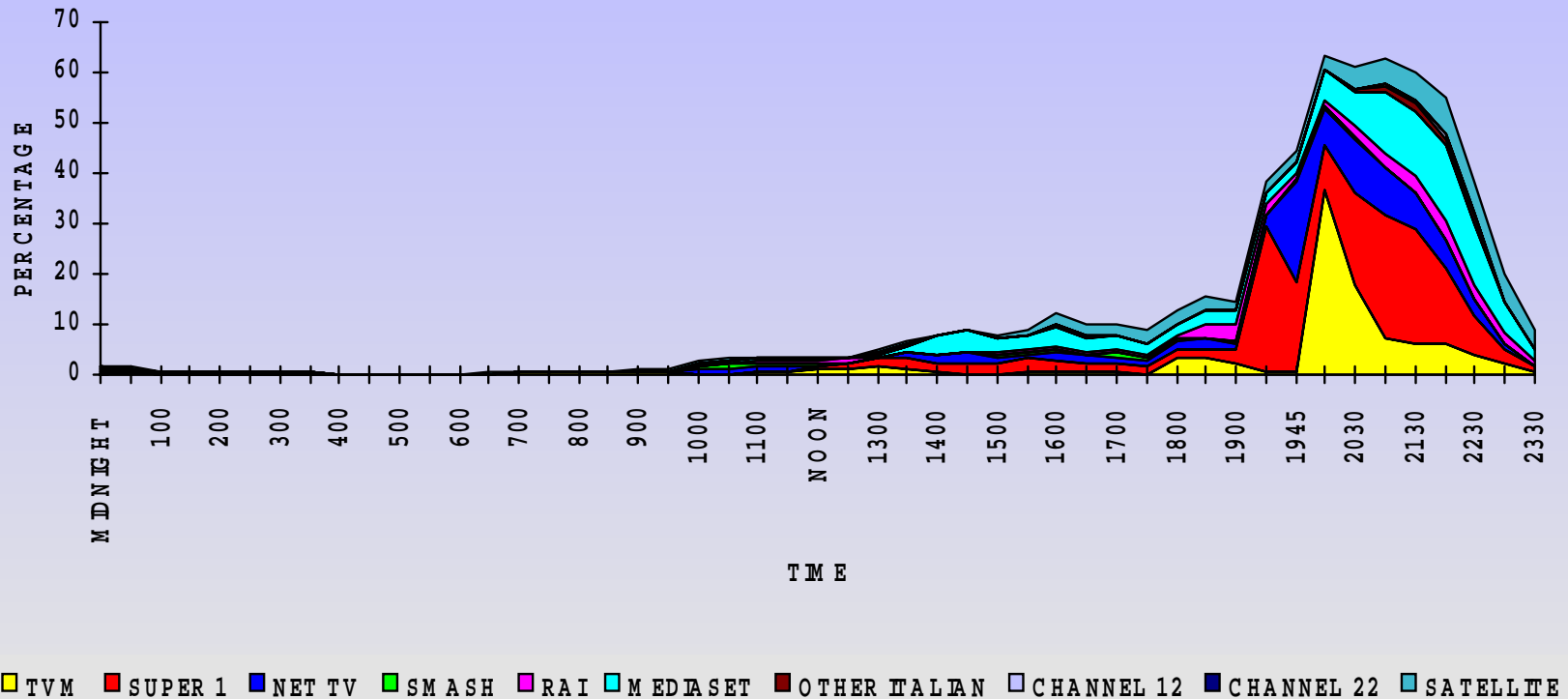




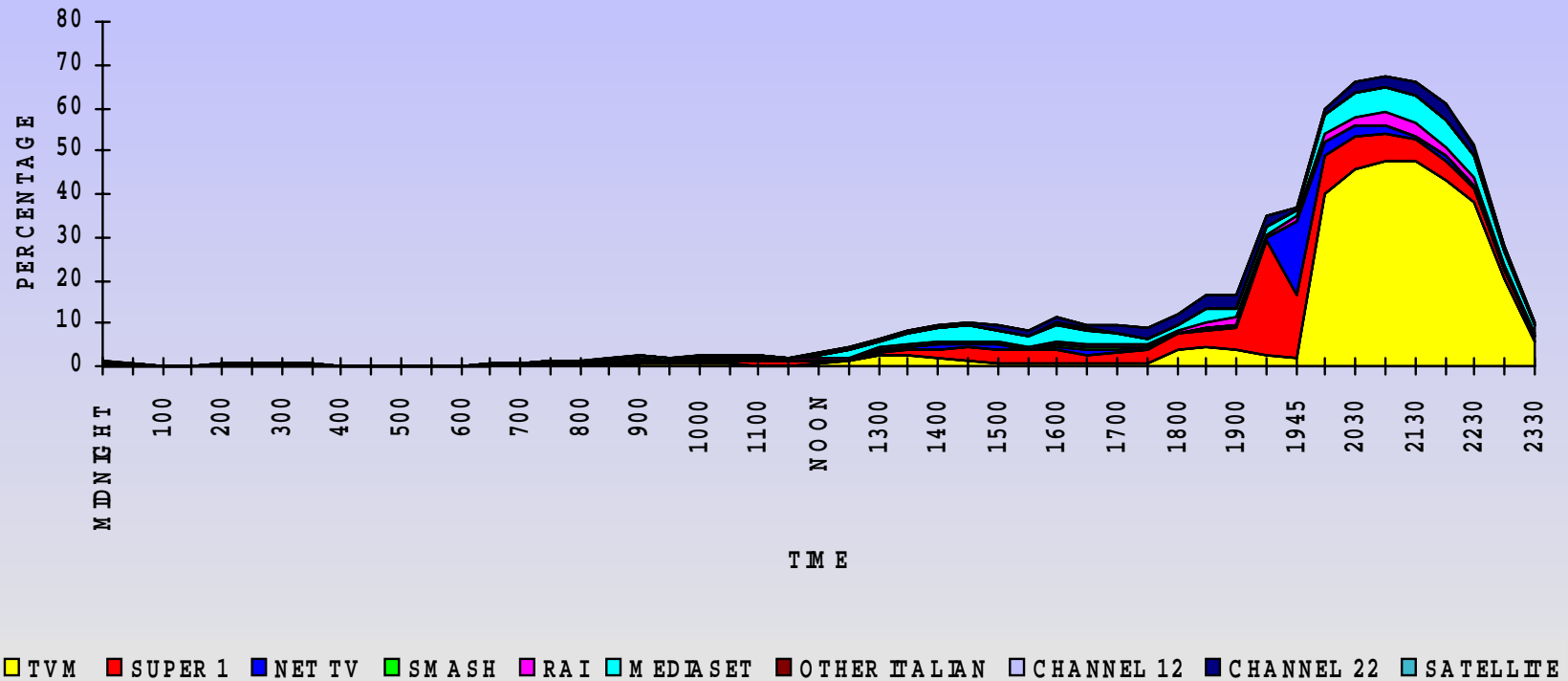
TV Viewing: Wednesday



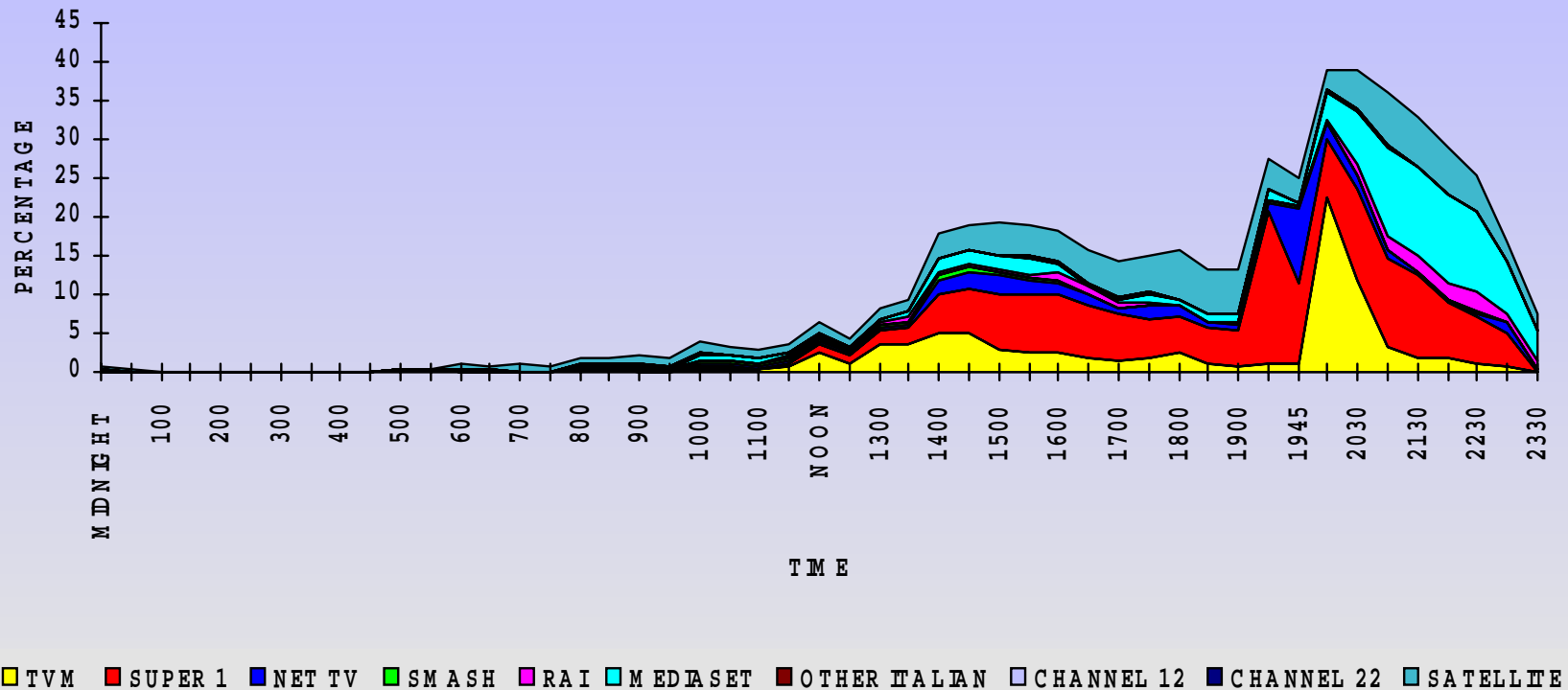
TV Viewing: Thursday



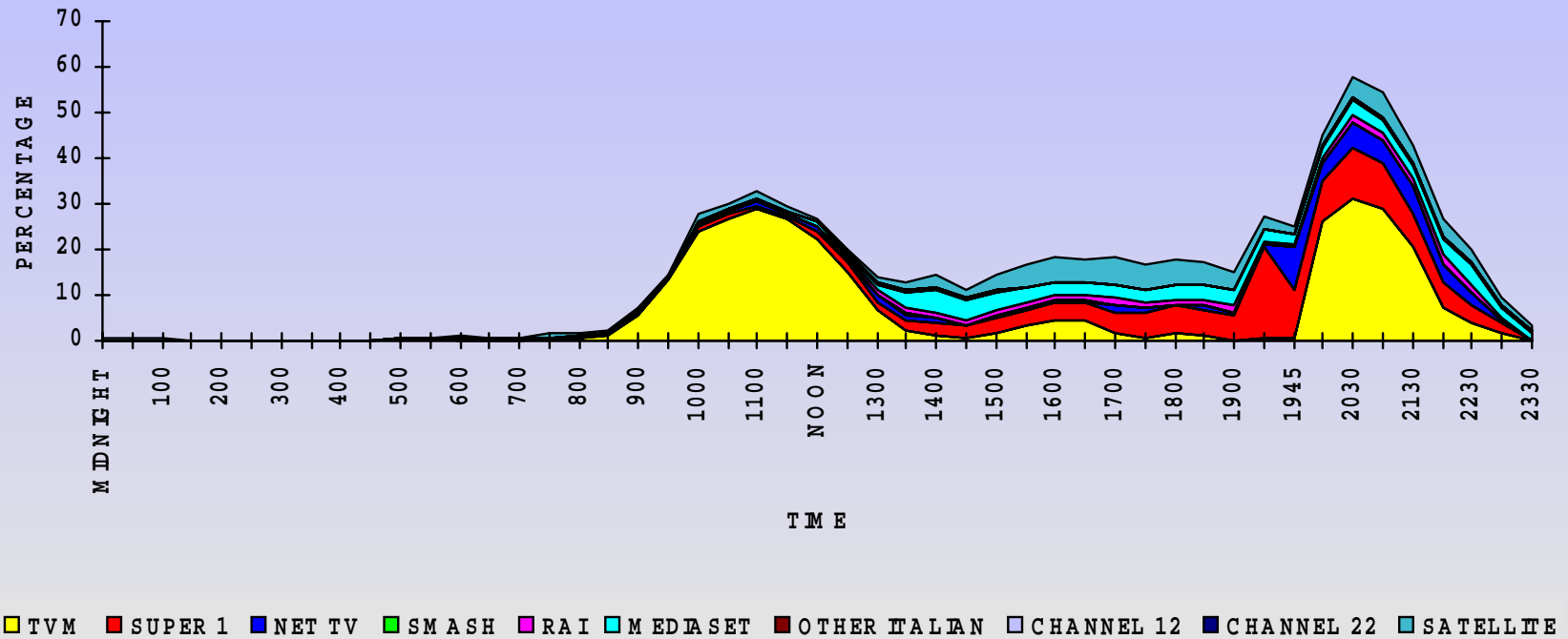
TV Viewing: Friday



TV Viewing: Saturday

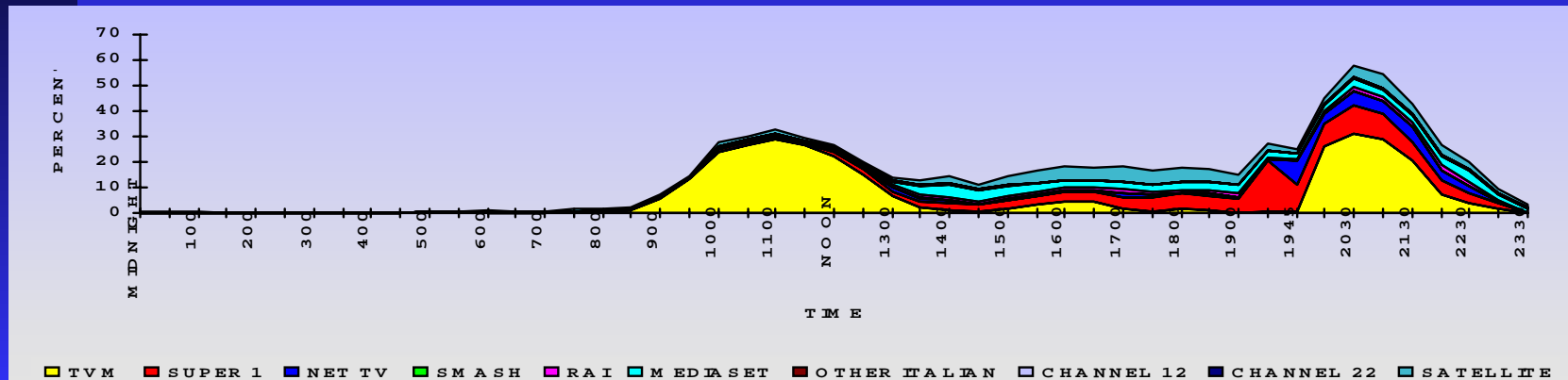
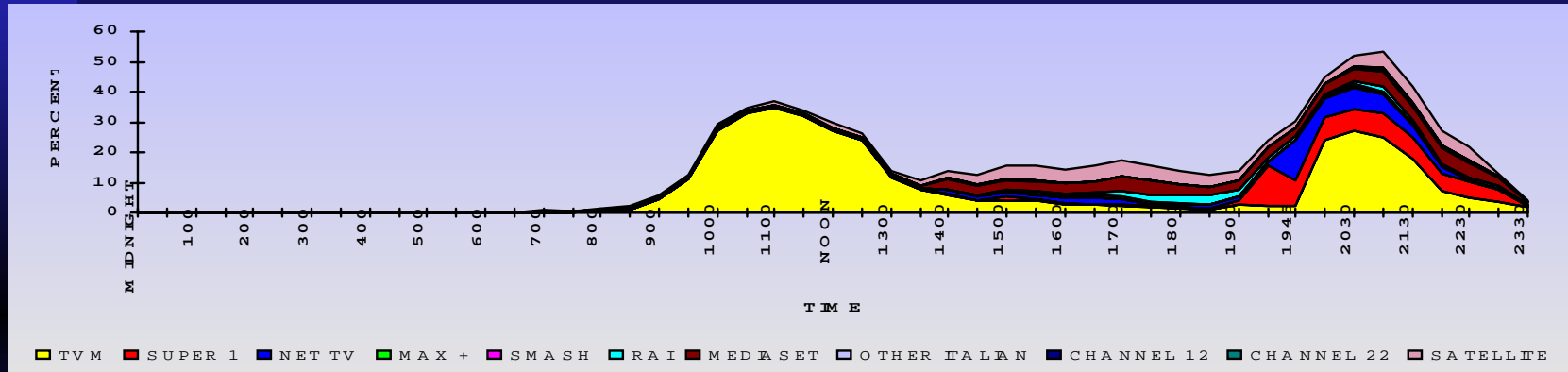


TV Viewing: Sunday



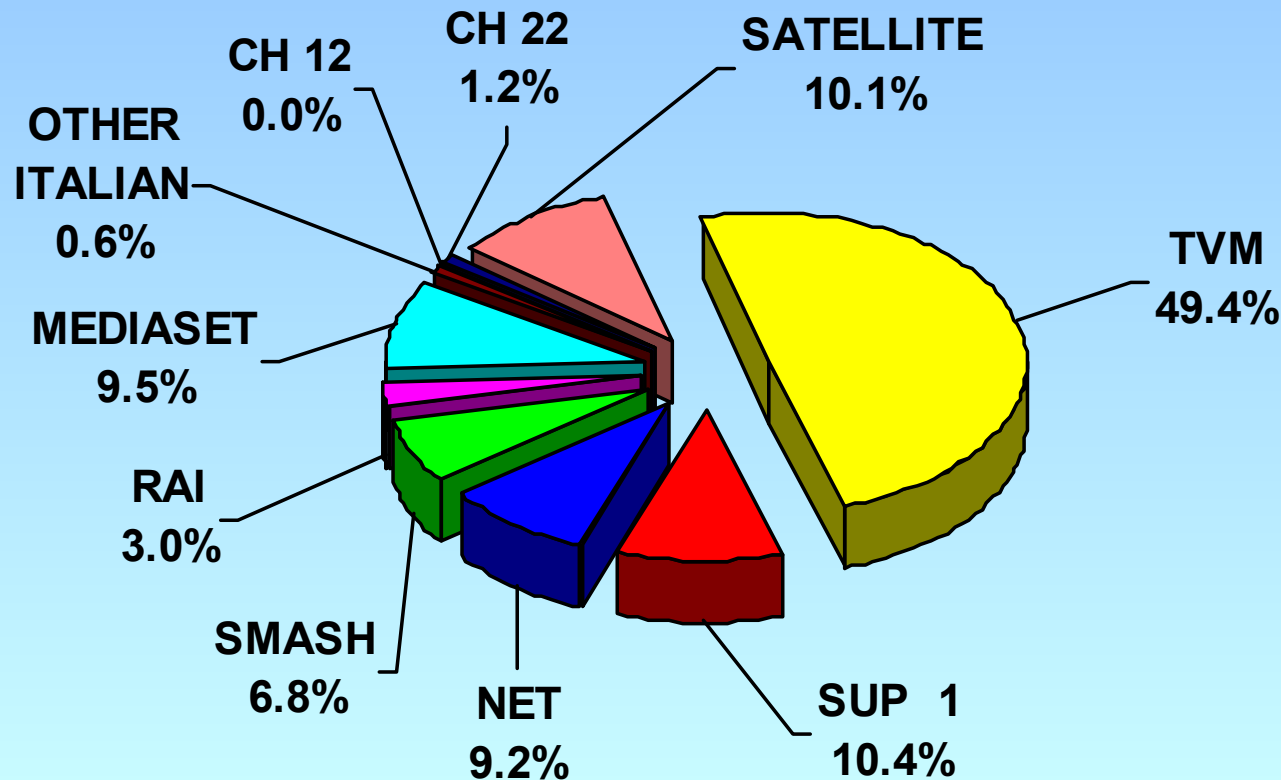
TV Viewing: Sunday

4th Quarter 2002 & 2003



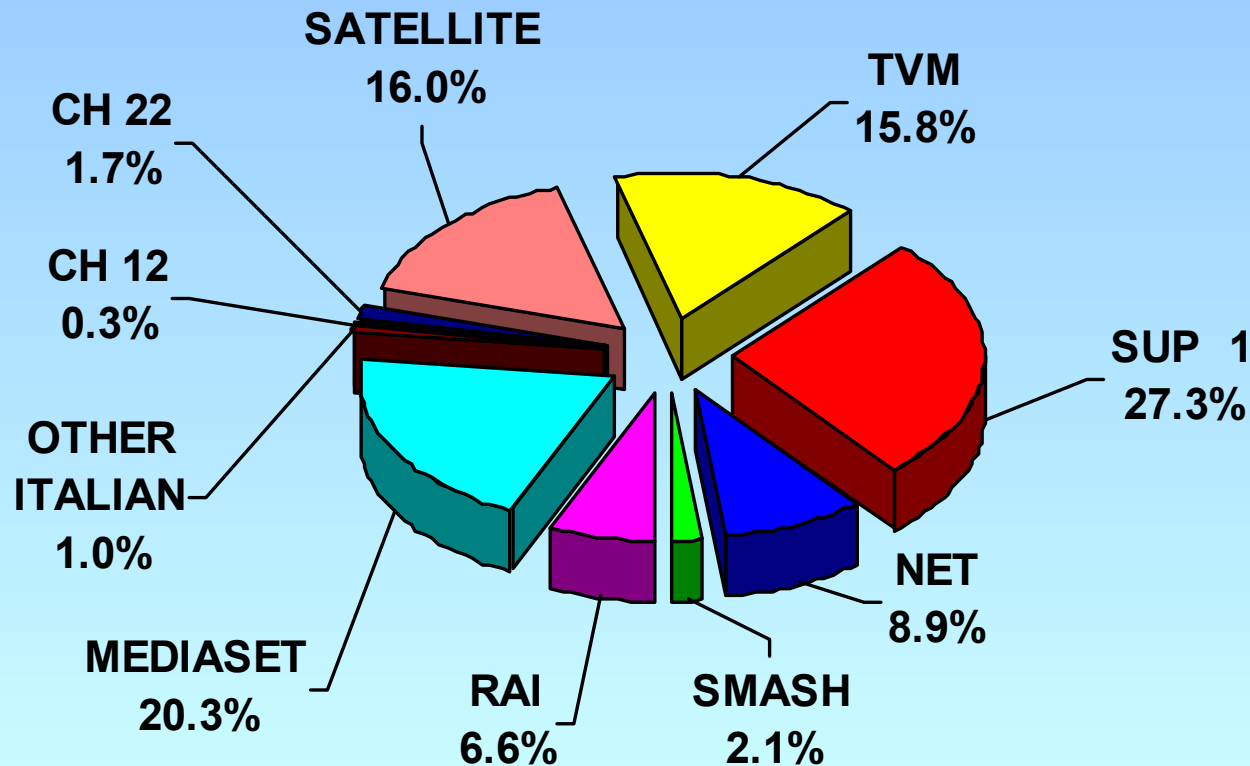
Daily Average TV Audience Levels

Time-Band 1: 0600 hrs -Noon



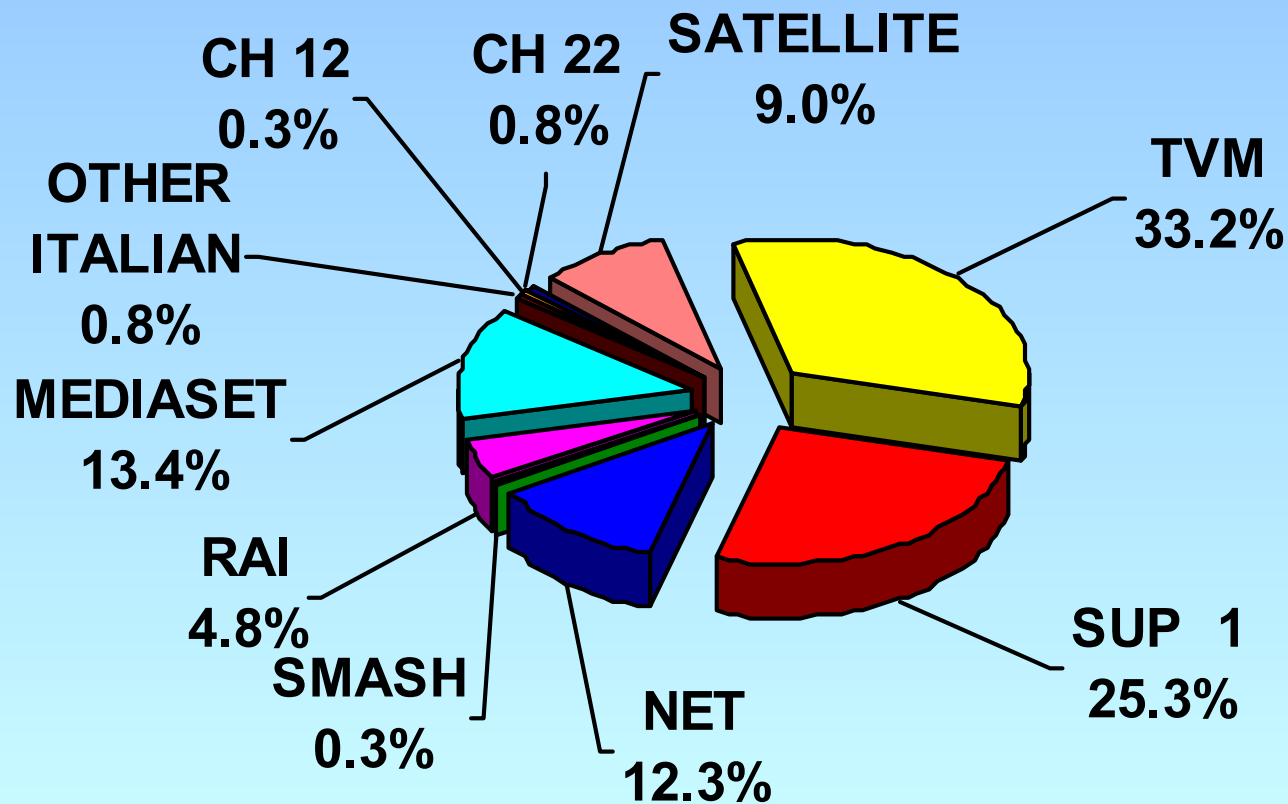
Daily Average TV Audience Levels

Time-Band 2: Noon – 1900 hrs



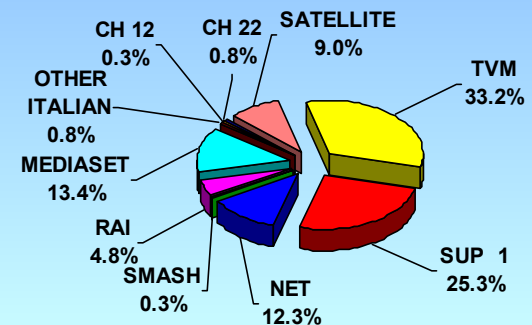
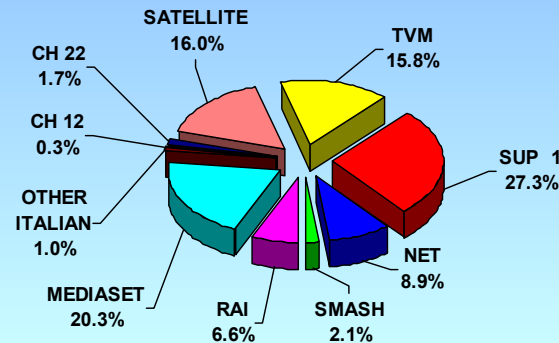
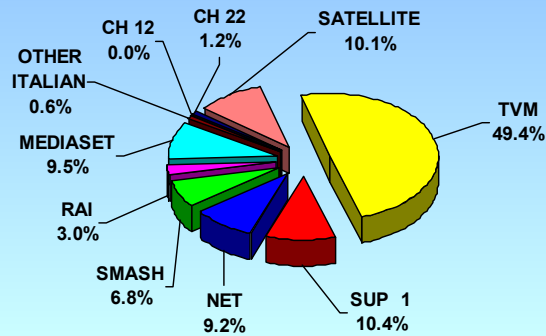
Daily Average TV Audience Levels

Time-Band 3: 1900 hrs -Midnight



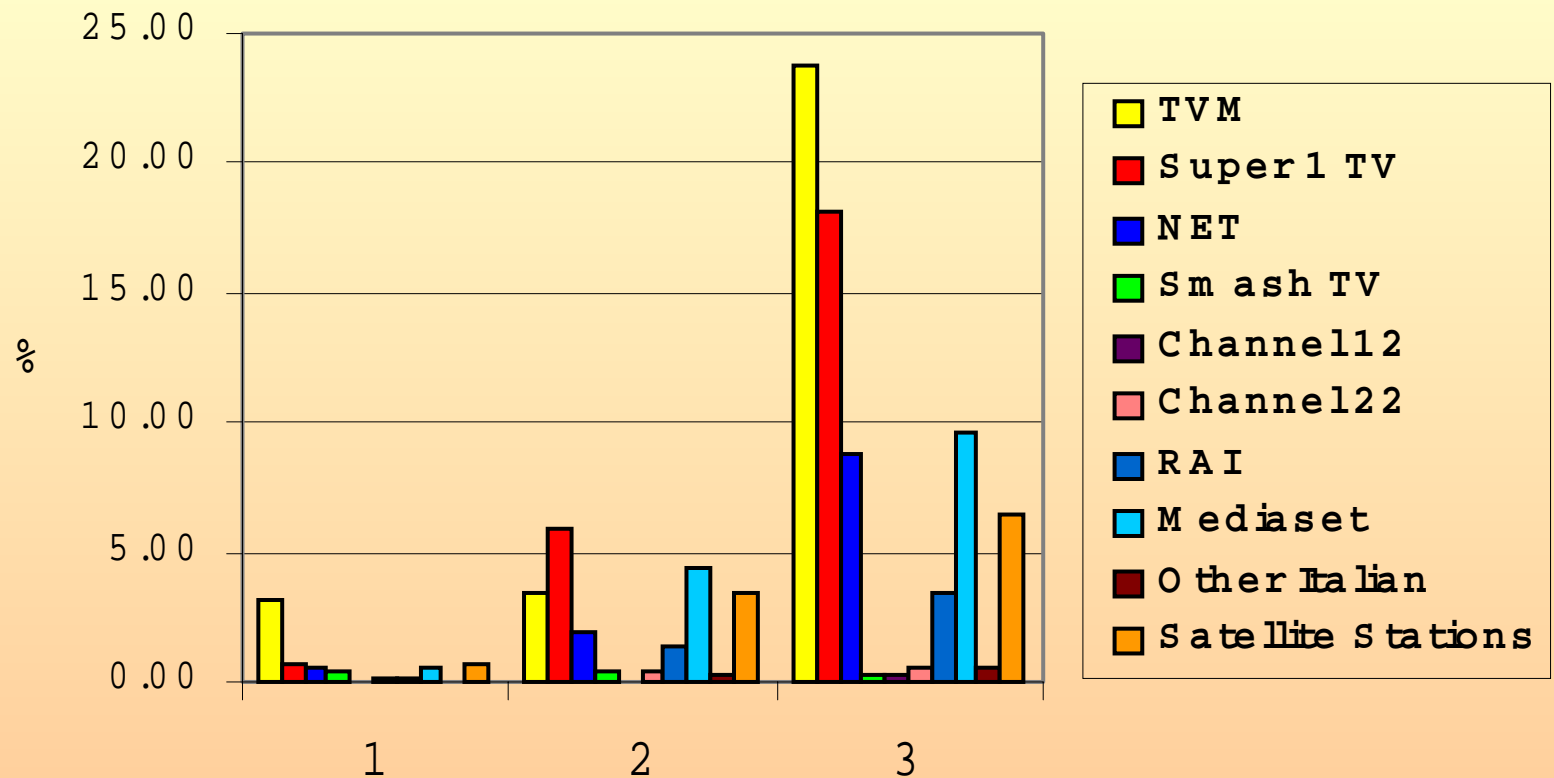
Daily Average TV Audience Levels

Time-Band Comparison



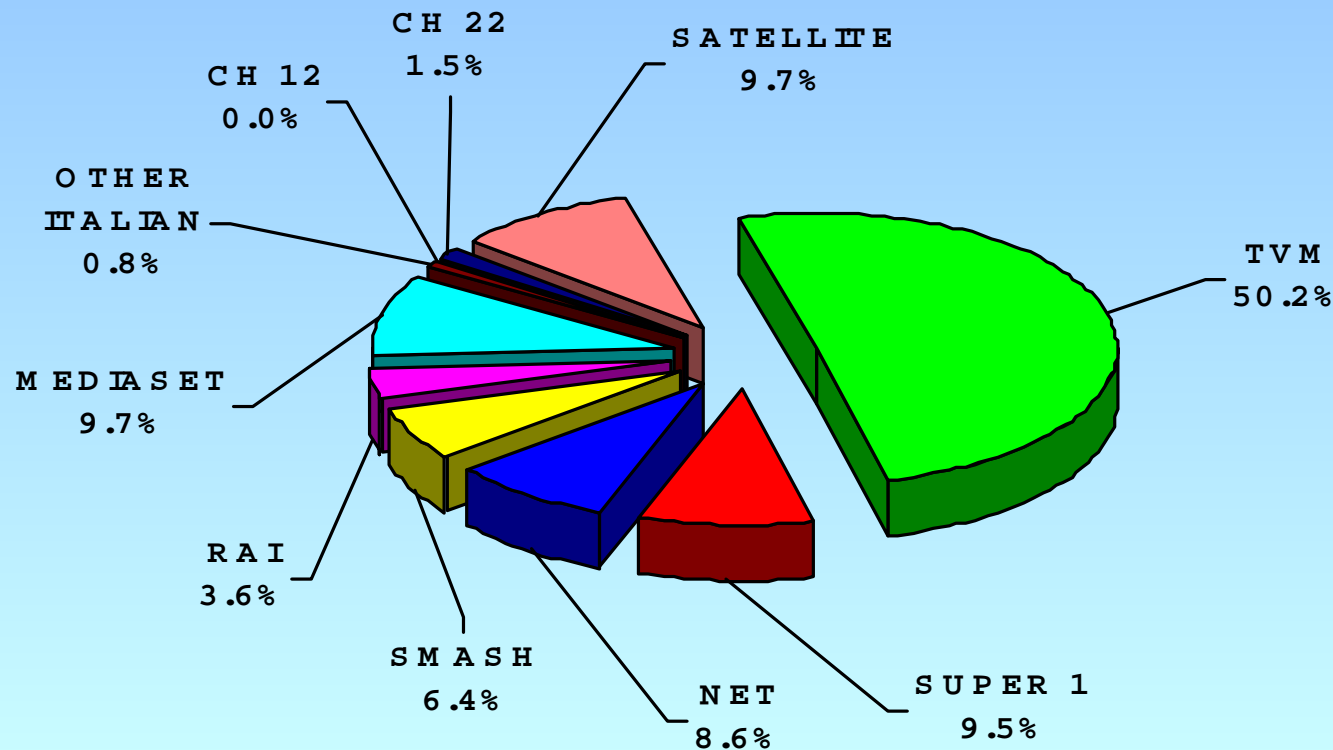
Daily Average TV Audience Levels

Time-Band Comparison in terms of Absolute Audience Size
4th Quarter 2003



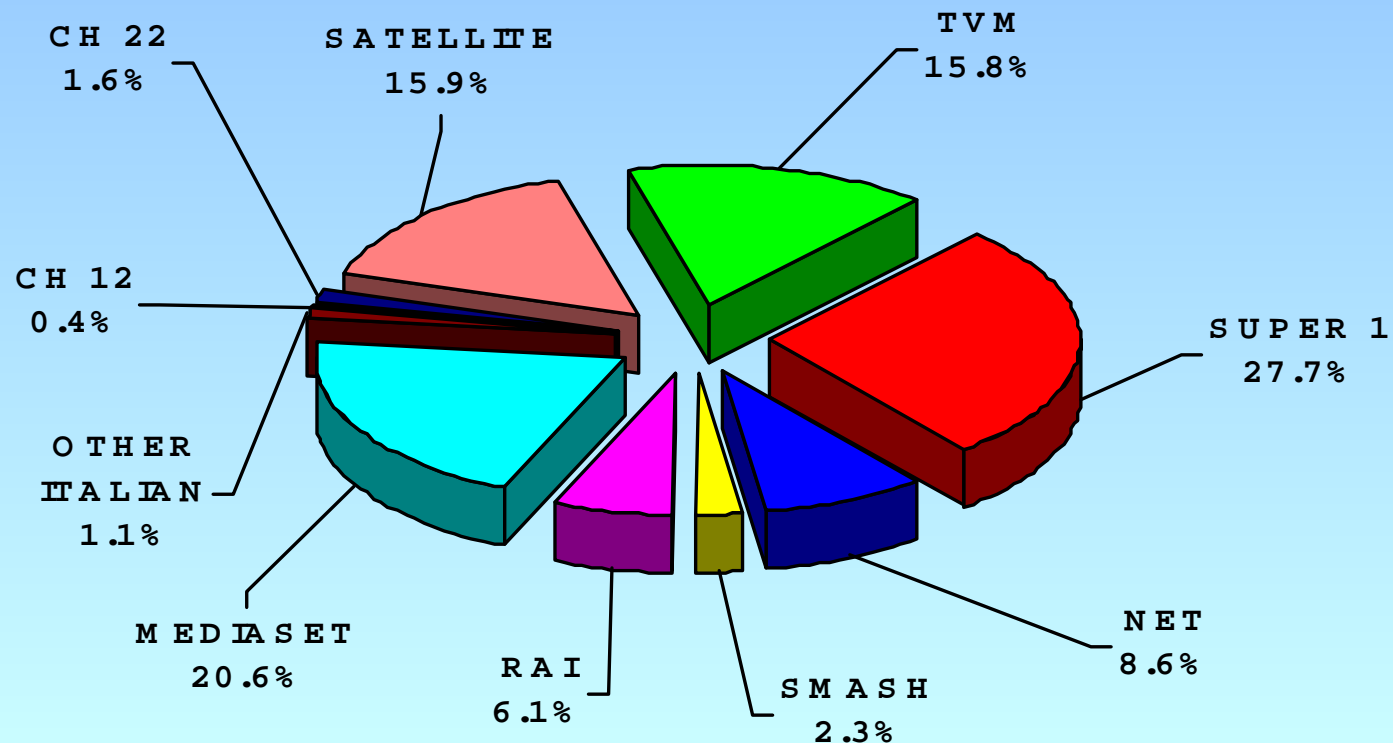
Daily Average TV Audience Levels

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



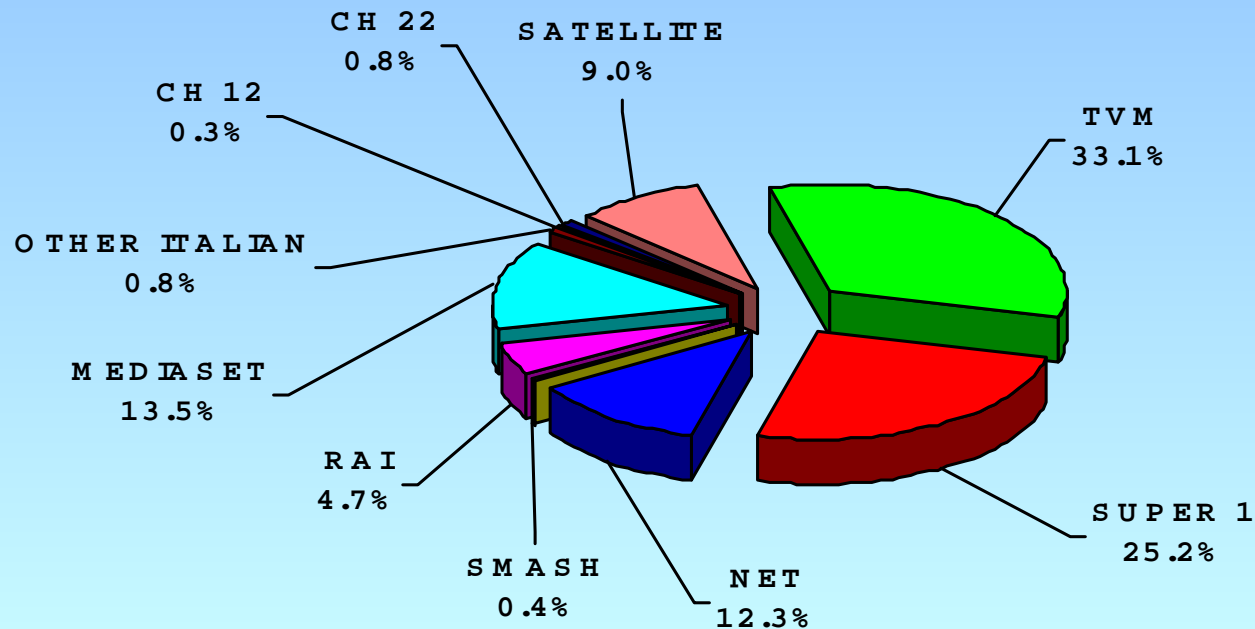
Daily Average TV Audience Levels

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	49.4	15.8	33.2
Super 1 TV	10.4	27.3	25.3
NET	9.2	8.9	12.3
Smash TV	6.8	2.1	0.3
Channel 12	-	0.3	0.3
Channel 22	1.2	1.7	0.8
RAI	3.0	6.6	4.8
Mediaset	9.5	20.3	13.4
Other Italian	0.6	1.0	0.8
Satellite Stations	10.1	16.0	9.0

Time-Band Comparison-Cable Only

	Time Band 1	Time Band 2	Time Band 3
	%	%	%
TVM	50.2	15.8	33.1
Super 1 TV	9.5	27.7	25.2
NET	8.6	8.6	12.3
Smash TV	6.4	2.3	0.4
Channel 12	-	0.4	0.3
Channel 22	1.5	1.6	0.8
RAI	3.6	6.1	4.7
Mediaset	9.7	20.6	13.5
Other Italian	0.8	1.1	0.3
Satellite Stations*	9.7	15.9	9.0

Conclusions:

- ❑ Radio audiences are increasing in absolute size in respect of 4th Quarter 2003.
- ❑ TV audience are also growing in absolute size in all three time-bands in respect of 4th Quarter 2003

Radio Stations: Relative Strengths

6.00 a.m. - Midnight

- Super 1 – 22.0%
- Radju Malta – 13.6%
- Radio 101 – 11.1%
- RTK – 10.7%
- Bay Radio – 9.8%
- Calypso – 7.8%
- Smash – 7.7%
- Capital – 5.8%
- Radju Parlament – 5.6%
- FM Bronja – 0.7%
- A3FM – 0.6%
- Campus FM – 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
- TVM attracts large audiences with *Xarabank*, *Bondi+*, *Dejjem Tieghek Becky & Tista' Tkun Int!*
- Super 1 attracts large audiences with *Gideb u Mhabba* and *Bla Agenda*
- NET TV attract large audiences with *It-tfal jigu bil-Vapuri*

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*.
- ❑ TVM has however lost relative audience share in all three time bands
- ❑ Super 1 TV has lost audience share in Time Band 1, but increased it in both Time Band 2 and 3.
- ❑ NET TV has gain audience share in Time Band 1, but decreased it in both Time Band 2 and 3 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!

