



Press Release No. 36-04:

Continuous Nationwide Radio and Television Audience Assessment June - September 2004

Since 1999, the Authority has been conducting two radio and television audience audits annually. Following a call for interest in the compilation of this year's audience audits, the Authority has commissioned the National Statistics Office to conduct on its behalf the collection of data for the purposes of Article 30(2) of the Broadcasting Act 1991.

From this year, audience data collection started on a daily basis through telephone interviews that were representative of the whole population. Through the process of a continuous audience assessment, the Authority is now in a position to provide data on the state of listening and viewing of broadcasting services on a quarterly basis.

Following a period of trials, audience data collection started on 1st June 2004 and the Authority is now in a position to publish the continuous audience results for the period June to September 2004.

1. Sample Profile

The sampling methodology used by the National Statistics Office (N.S.O.) gave the following sampling profile which followed closely the figures for the resident population in Malta as compiled by N.S.O.:

Table 1.1: Sample Profile by Gender. Includes two tables: 'Sample Profile' and 'Demographics [LFS 04]' comparing age groups and gender percentages.

Differences of less than 5% are evident when the sample is analysed by gender, by age group and by district. The largest differences are those for figures for population distribution by district [+4.8% in South Harbour area and +4.5% in the South Eastern area] while females are more represented than males by a difference of 4.4%.

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## 2. Radio Audience Listening

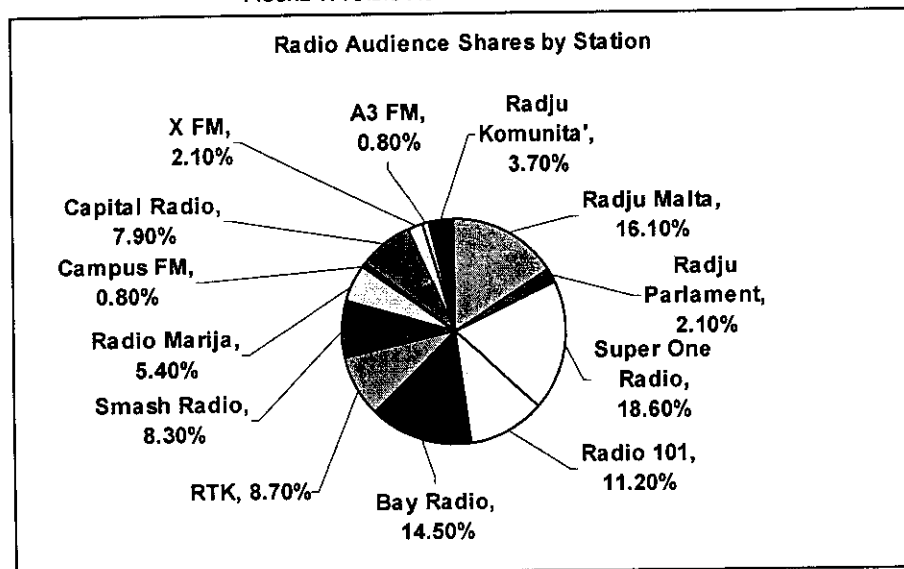
The study documents two important aspects of radio listening. Firstly it summarises the popularity of the stations based on the choice of preferred station and the popularity of specific programme types. Secondly, the study documents the audience shares attained by each broadcasting station for the whole period, audience patterns by week and audience listenership by month.

Of all those who listen to radio, 19.7% stated that they do not have a particular preferred station. Super One Radio [15.3%] is the most preferred radio station, followed by Radju Malta [10.5%], Bay Radio [9.6%], RTK [9.2%] and Smash Radio [8.2%].

News and Current Affairs [87.9%] remain the most popular programme sector with the Maltese listener. This is followed by Musical Programmes [85.8%], and Health/Beauty programmes [68.2%]. Religious [59.0%] and Discussion Programmes [52.9%] are also quite popular during this period.

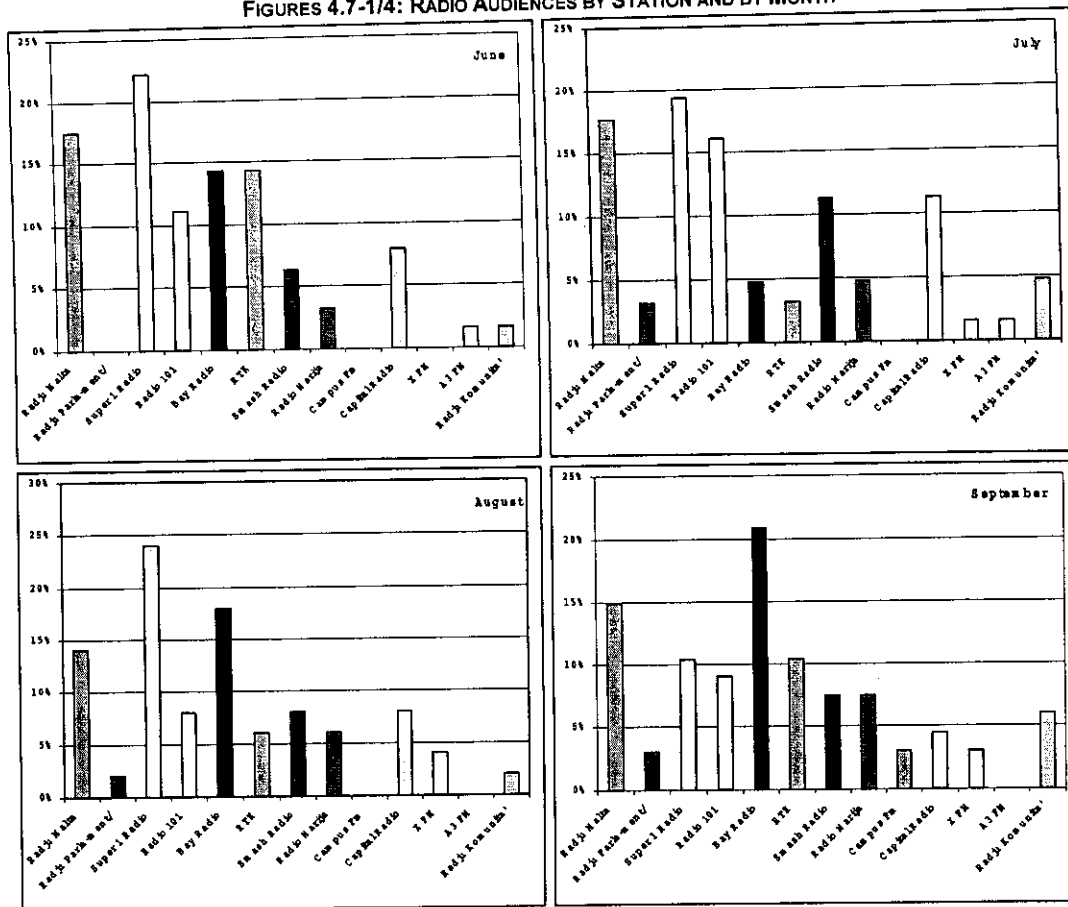
The average radio audience share for the summer quarter June-September 2004 is reproduced hereunder:

FIGURE 1: RADIO AUDIENCE SHARE BY STATION



Analysing radio audiences by month, Super One Radio was first for three months [June, July, August] and losing its place to Bay Radio in September. Bay Radio was third place in June and August. Radju Malta kept its place as the second most listened to radio station through the four months. RTK was third place in June and September while Radio 101 was third place in July. This is graphically represented below:

FIGURES 4.7-1/4: RADIO AUDIENCES BY STATION AND BY MONTH



### 3. Television Audience Shares

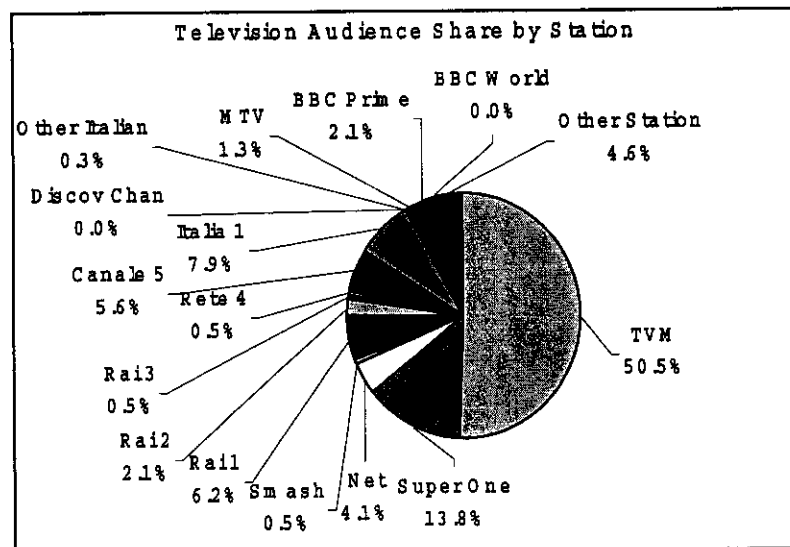
Participants in this study were asked whether they watch television regularly or not. Compared to other studies conducted for the Authority, television viewing was slightly lower during this period at 97.1% [April 2003 – 99.4%; October 2003 – 99.3%].

Of those who regularly watch television, 22.5% stated that they do not have any particular preferred station. TVM [16.2%] is the most preferred station, followed by Super One TV [14.4%]. During this period TVM attracted more males than females while Super One TV, Net TV and Smash TV attracted more females than males.

Again, News and Current Affairs Programmes on television is the more popular programme sector [91%]. This is followed by Weather [84.1%] Plays/Drama [76%] and Discussion Programmes [69.7%]. Of all the fourteen television programme sectors, Sports is the programme sector that is preferred by males as compared to females. All the other programme sectors are more favoured by females.

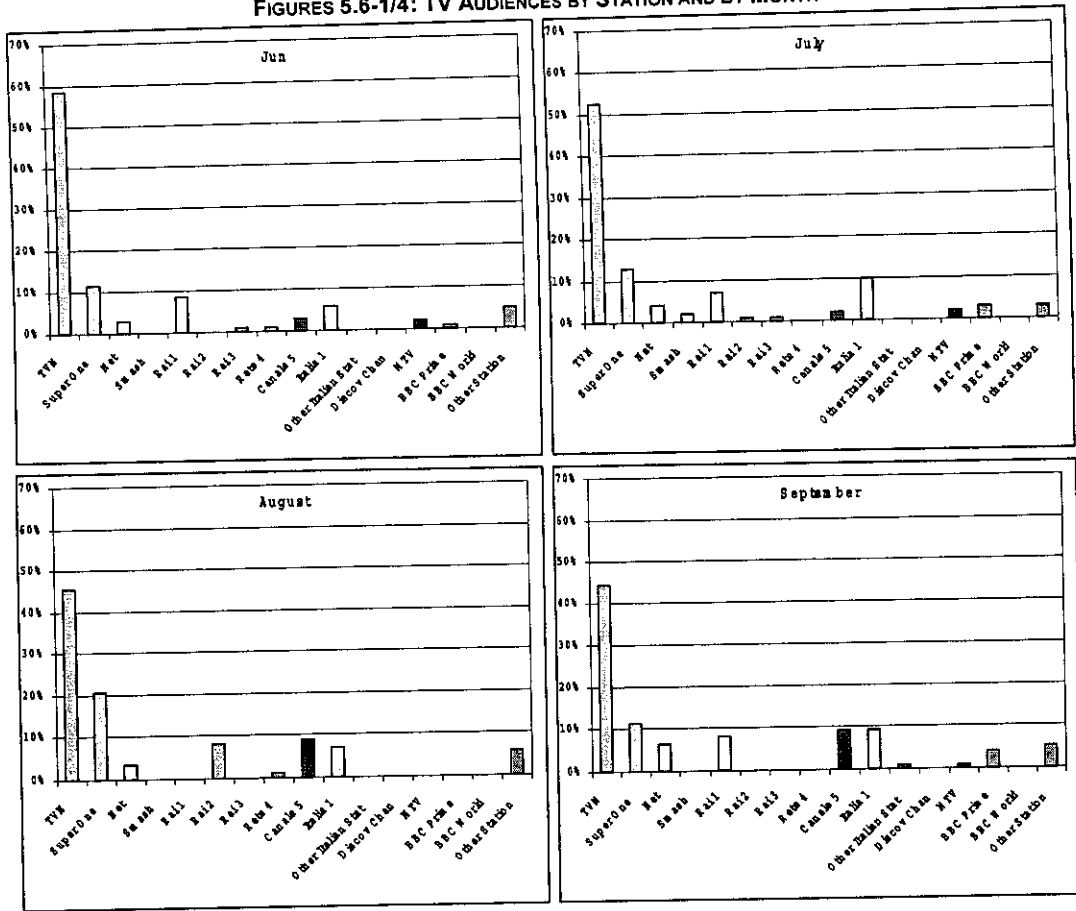
TVM registered the highest audience score for the period total at 50.5% with the highest daily total registering on Tuesdays. This was followed by Super One TV [13.8% - Thursdays] and Net TV [4.1% - Wednesdays] from local broadcasting stations.

FIGURE 5.4: TELEVISION AUDIENCE SHARE BY STATION



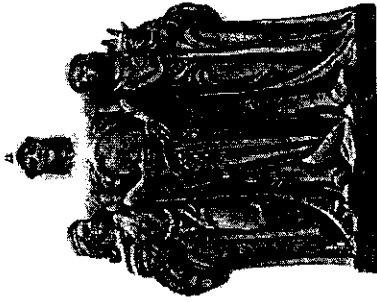
Analysing audiences by month, TVM decreased its audience share from 58.7% in June to 44.3% in September, though maintaining its leading position. Super One TV, on the other hand, attained its highest audience [20.5%] in August while Net TV nearly doubled its audiences from June to September.

FIGURES 5.6-1/4: TV AUDIENCES BY STATION AND BY MONTH



30<sup>th</sup> November, 2004

The two-volume of the broadcasting survey is available for sale on CD from the Offices of the Broadcasting Authority, 7 Mile End Road, Hamrun HMR 02 at Lm20 per copy.



**A Report on a Study of  
Radio and Television Audiences  
In Malta  
June – September 2004**

**Prepared for the  
Broadcasting Authority  
In Collaboration with the  
National Statistics Office**



**NATIONAL STATISTICS OFFICE • MALTA**



## Objectives: Article 30(2) Broadcasting Act

To make and transmit to the Prime Minister a report that would include the results of independent audience research ascertaining:

- the state of listenership or viewership of broadcasting services provided in Malta;
- the state of public opinion concerning programmes included in broadcasting services provided in Malta;
- any effects of such programmes on the attitudes or behaviour of those who watch them; and
- the types of programmes that members of the public would like to be included in broadcasting services provided in Malta

The Broadcasting Authority has engaged the National Statistics Office in order to compile the data.



## Methodology

- **Target population: 12 years+ residing in private households**
- **Annual sample size equals to 2,000 individuals**
- **Sample is spread evenly across survey period**



## Methodology

- **Data is collected by means Telephone Interviewing**
- **Sample is selected from a list of all individuals residing in private households**
- **Results are issued by the Broadcasting Authority**



## Methodology

### Main variables:

**Radio - favourite local station, favourite kinds of programmes, length of time respondent listened to radio on previous day, local stations respondent listened to on previous day.**

**TV – favourite station, favourite kinds of programmes, length of time respondent watched on previous day, stations respondent watched on previous day.**

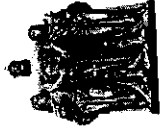


## Sample Profile

- Sample structure is based on the demographic features of the resident population in Malta.
- Compared to demographic data, differences of less than 5% are evident when analyzed by gender, by age group and by district

Sample Profile			
Age Group	Total %	Gender	
		Male %	Female %
12-29	28.3	32.4	24.9
30-49	35.5	34.8	36.1
50+	36.2	32.8	39.0
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>N =</b>	<b>552</b>	<b>247</b>	<b>305</b>
<b>%</b>	<b>100.0</b>	<b>44.7</b>	<b>55.3</b>

Demographics [Labour Force Survey '04]			
Age Group	Total %	Gender	
		Male %	Female %
12-29	30.8	32.6	29.1
30-49	33.9	34.3	33.6
50+	35.2	33.1	37.3
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>N =</b>	<b>341180</b>	<b>167623</b>	<b>173557</b>
<b>%</b>	<b>100.0</b>	<b>49.1</b>	<b>50.9</b>



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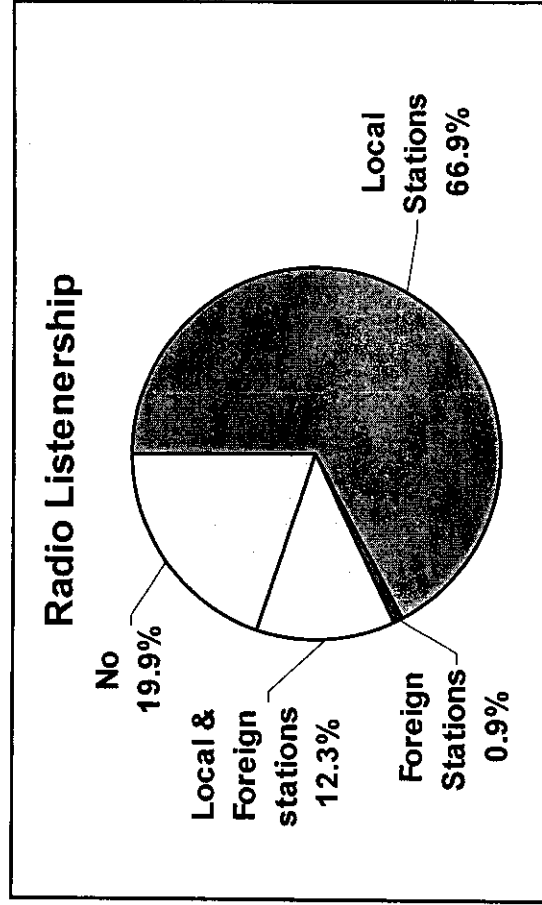
## Sample Profile

	Sample	N.S.O.	[+/-]
<b>By Gender</b>			
Males	44.7%	49.1%	[-4.4%]
Females	55.3%	50.9%	[+4.4%]
<b>By Age Group</b>			
12-29	28.3%	30.8%	[-2.5%]
30-49	35.5%	33.9%	[+1.6%]
50+	36.2%	35.2%	[+1.0%]
<b>By District</b>			
South Harbour	26.8%	22.0%	[+4.8%]
North Harbour	27.7%	31.4%	[-3.7%]
South Eastern	17.6%	13.1%	[+4.5%]
Western	13.4%	14.0%	[-0.6%]
Northern	8.0%	11.7%	[-3.7%]
Gozo & Comino	6.5%	7.8%	[-1.3%]



## Listening and Viewing Patterns - Radio

Radio listening reached the 80.1%  
April 2003 – 72%  
October 2003 – 76.3%



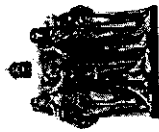


## Listening and Viewing Patterns - Radio

Radio is mostly listened to by:

- Persons in the 30-49 age bracket [36.2%] followed by those in the 50+ age group [35.5%].
- Persons having secondary schooling [41.5%] followed by those having primary school level [31.4%].
- Persons employed [34.8%] and housepersons [34.2%]

Local Stations Listenership - 78.4% of listeners in the Western district followed by 70.5% of those living in the Northern district



## Listening and Viewing Patterns - Radio

### Favorite Radio Station:

Super One Radio [15.3%] is the most preferred radio station, followed by Radju Malta [10.5%], Bay Radio [9.6%], RTK [9.2%], and Smash Radio [8.2%]

19.7% stated that they do not have a particular preferred radio station

Table 2.1 – Favourite Radio Station

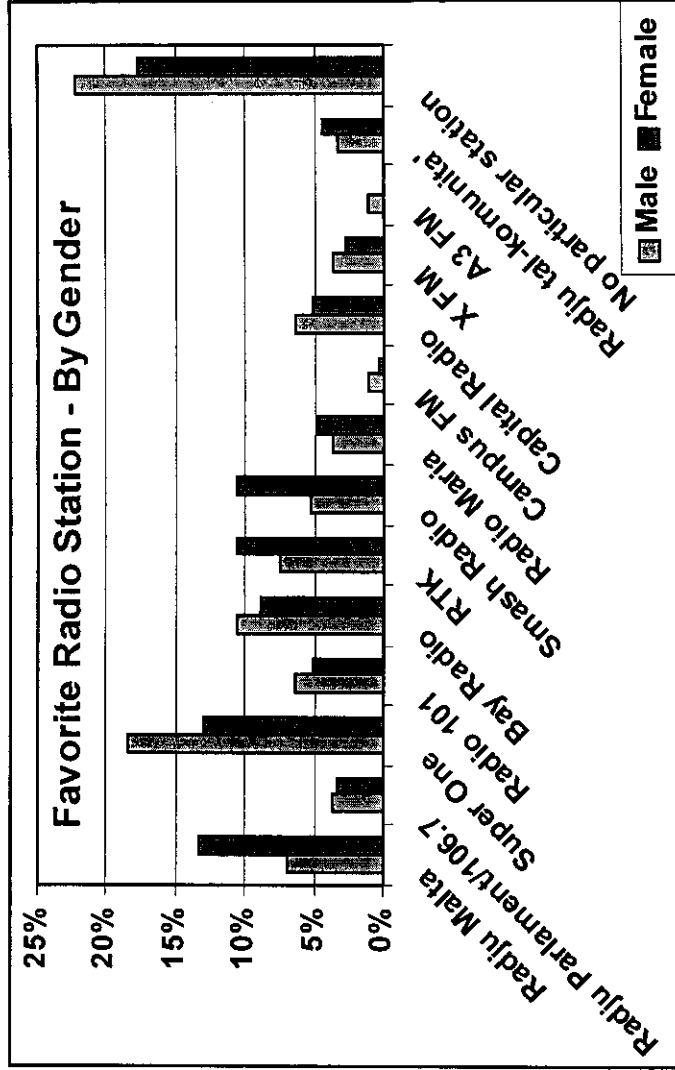
Radju Malta	10.5%
Radju Parlament/106.6	3.4%
Super One	15.3%
Radio 101	5.7%
Bay Radio	9.6%
RTK	9.2%
Smash Radio	8.2%
Radio Maria	4.3%
Campus FM	.7%
Capital Radio	5.7%
X FM	3.2%
A3 FM	.5%
Radju tal-komunità	3.9%
No particular station	19.7%
Total	100%



## Listening and Viewing Patterns - Radio

### Favorite Radio Station by Gender:

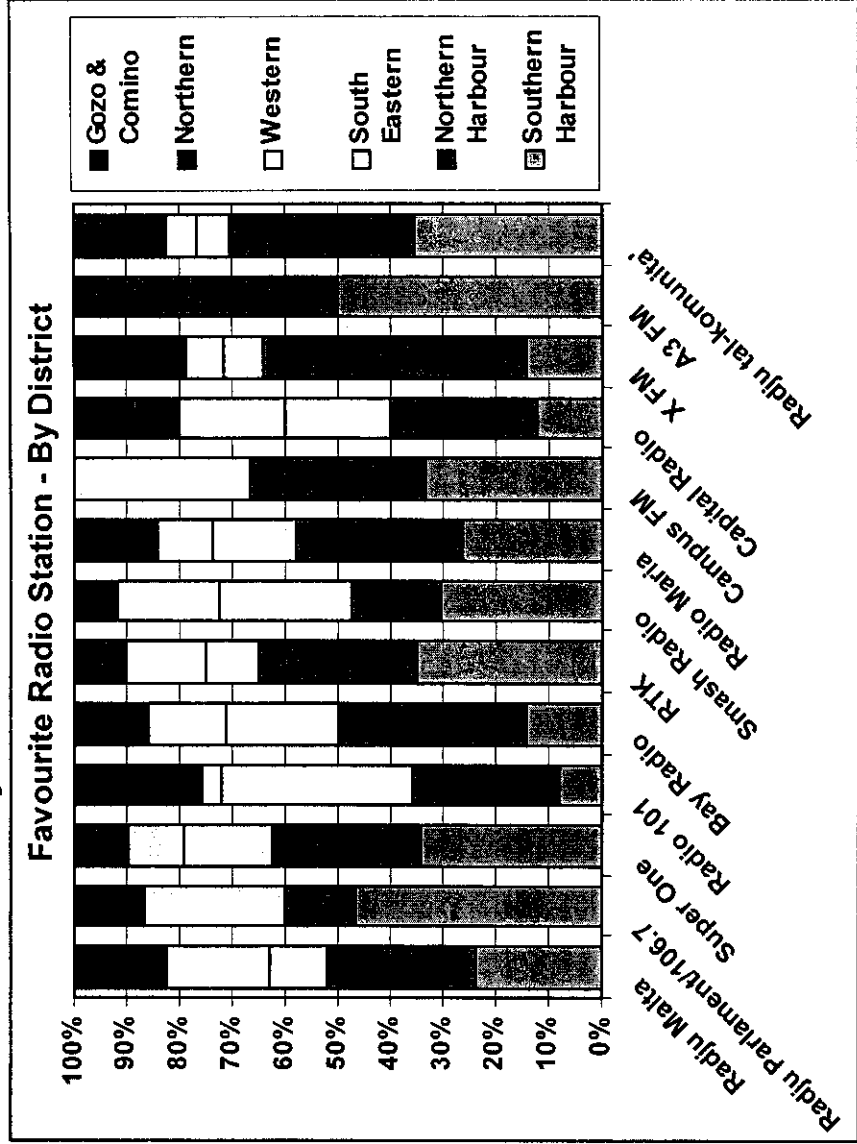
While more males [22.2%] than females [17.7%] do not have any preference to a particular radio station, Radju Malta, RTK, Smash and Radju Maria attracted more females than males





# Listening and Viewing Patterns - Radio

## Favorite Radio Station by District:





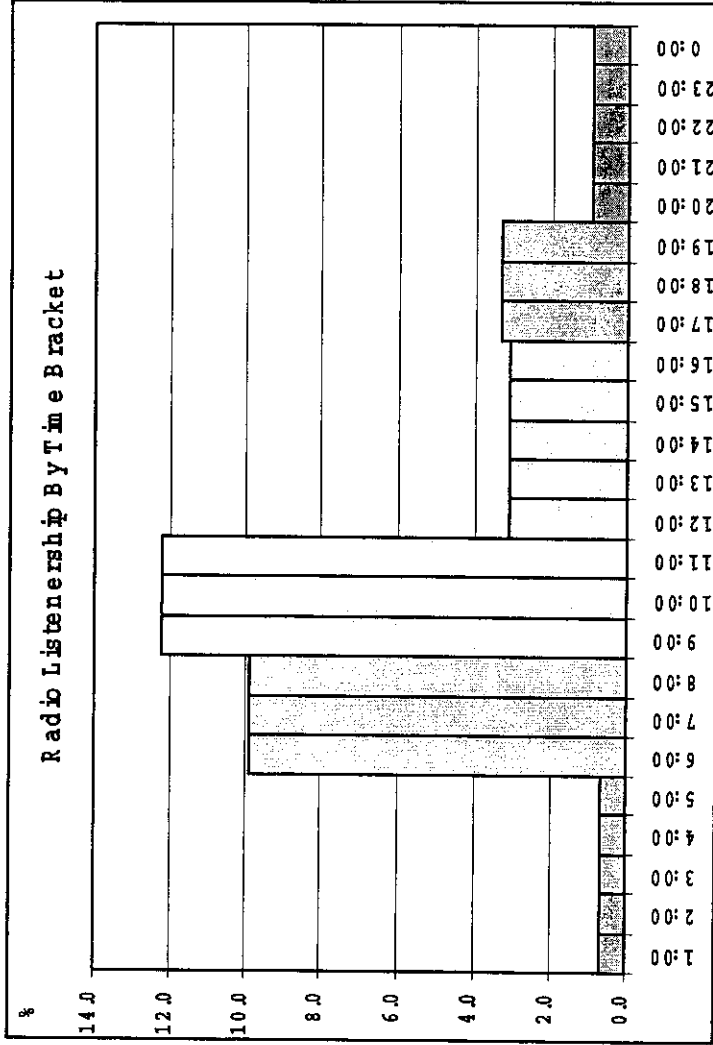
## Listening and Viewing Patterns - Radio

### Favorite Radio Station by District:

- Super One Radio - first in four districts, second in Western District and third in Northern District
- Radju Malta - first in Western District and Northern District
- RTK, Smash Radio, Capital Radio – first in Gozo
- Bay Radio – Second in Northern Harbour, South Eastern and Northern District
- Radio 101 – second in the South Eastern and Northern District



# Radio Audience Analysis

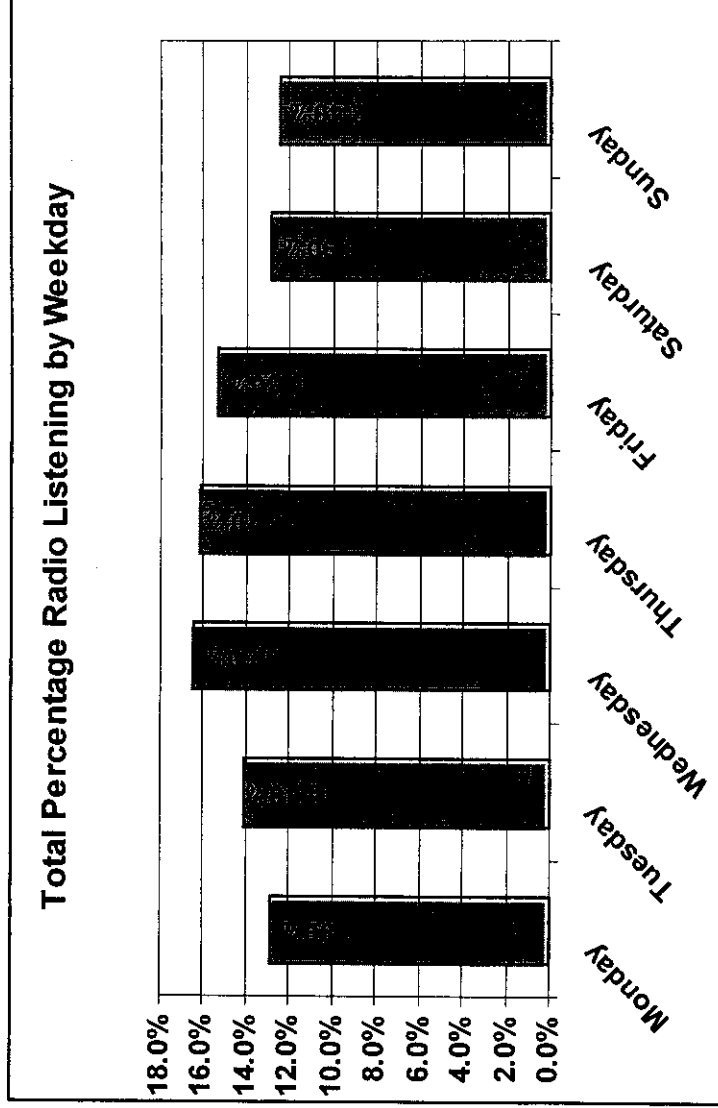


All Radio Listeners	
Time Bands	All Listeners
Before 06:00	3.2%
06:00 – 09:00	27.7%
09:00 – 12:00	34.1%
12:00 – 17:00	14.5%
17:00 – 20:00	9.2%
20:00 – 24:00	4.4%
All Day	5.2%
Refusal	1.6%



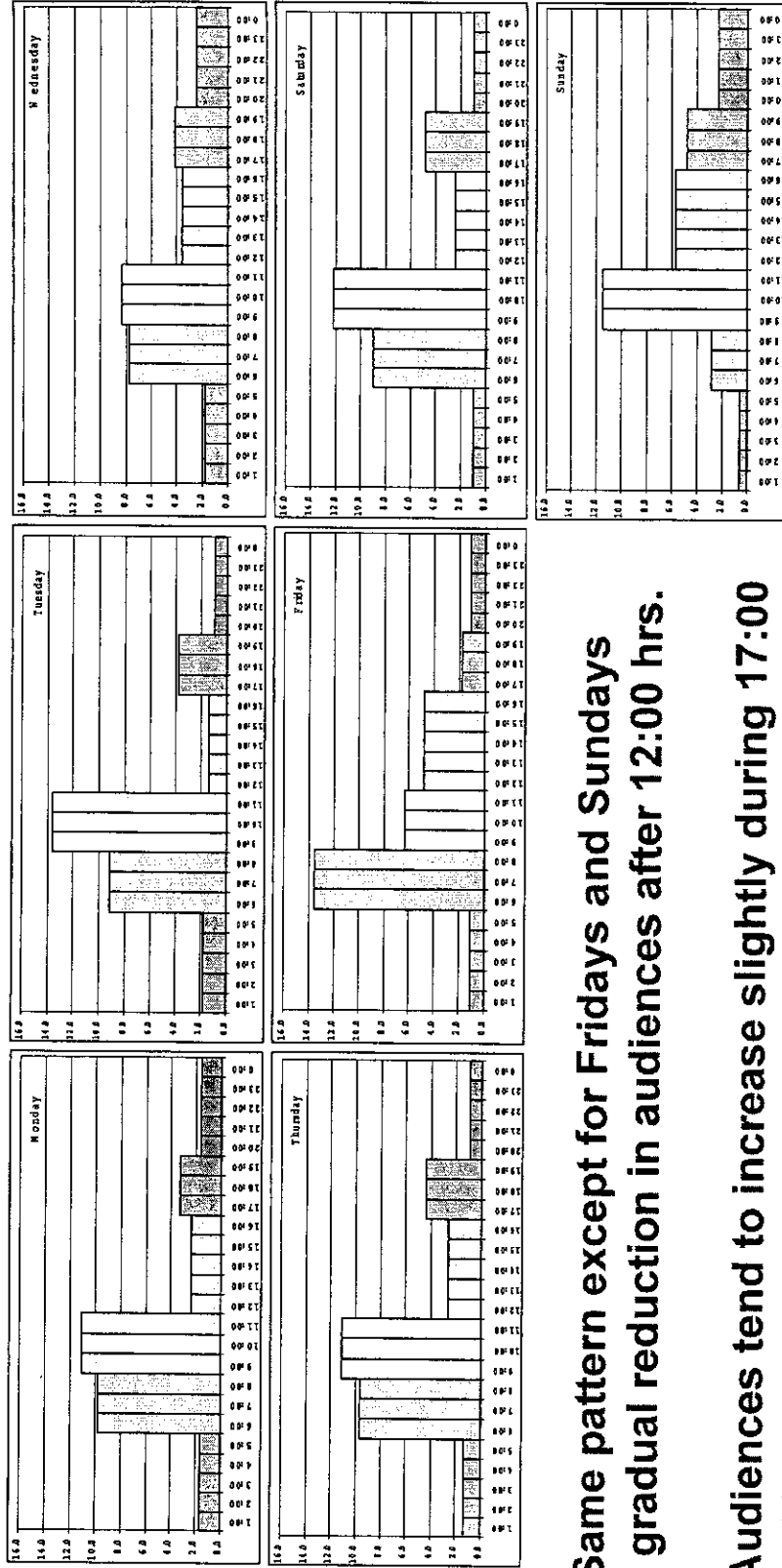
## Radio Audience Analysis

The daily percentage of radio listening was nearly constant within the whole week ranging from 12.4% on Sunday to 16.5% on Wednesday





## Radio Audience Analysis – By Weekday



**Same pattern except for Fridays and Sundays  
 - gradual reduction in audiences after 12:00 hrs.**

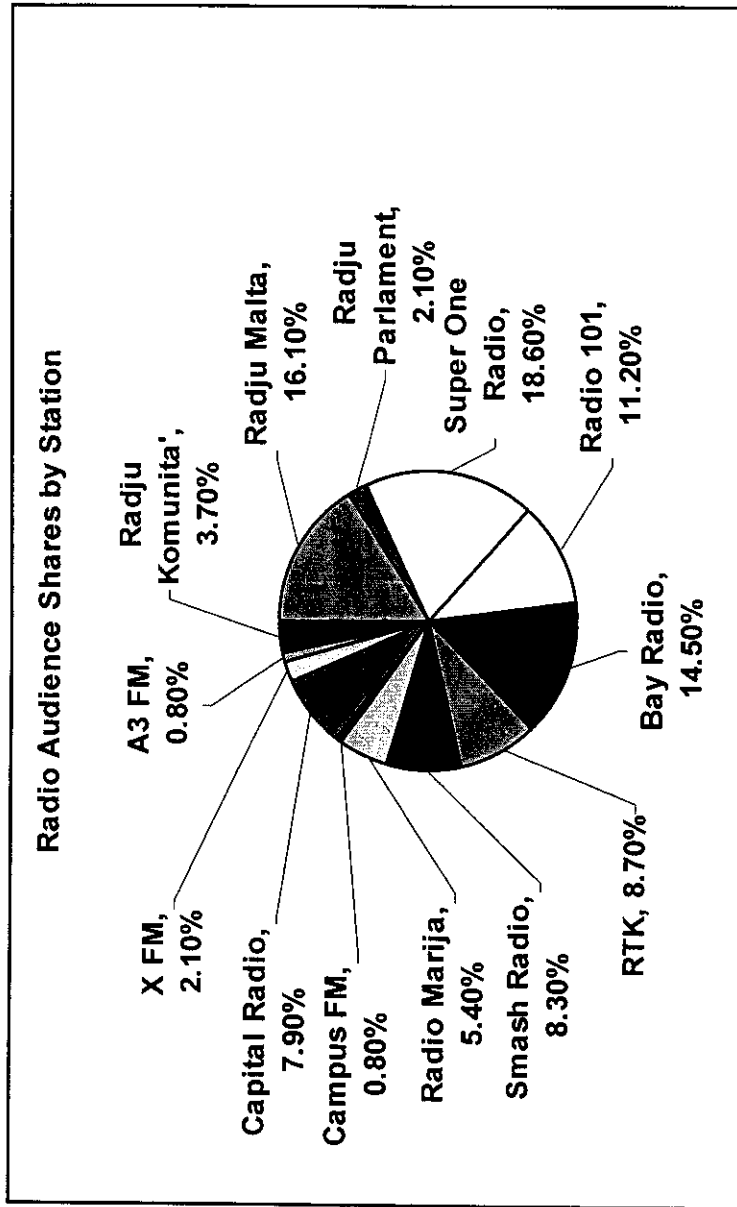
**Audiences tend to increase slightly during 17:00  
 to 20:00 hrs**

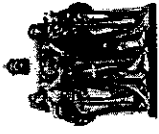


## Radio Audience Analysis

Super One Radio registered the highest share [18.6%] with the highest daily total on Thursday.

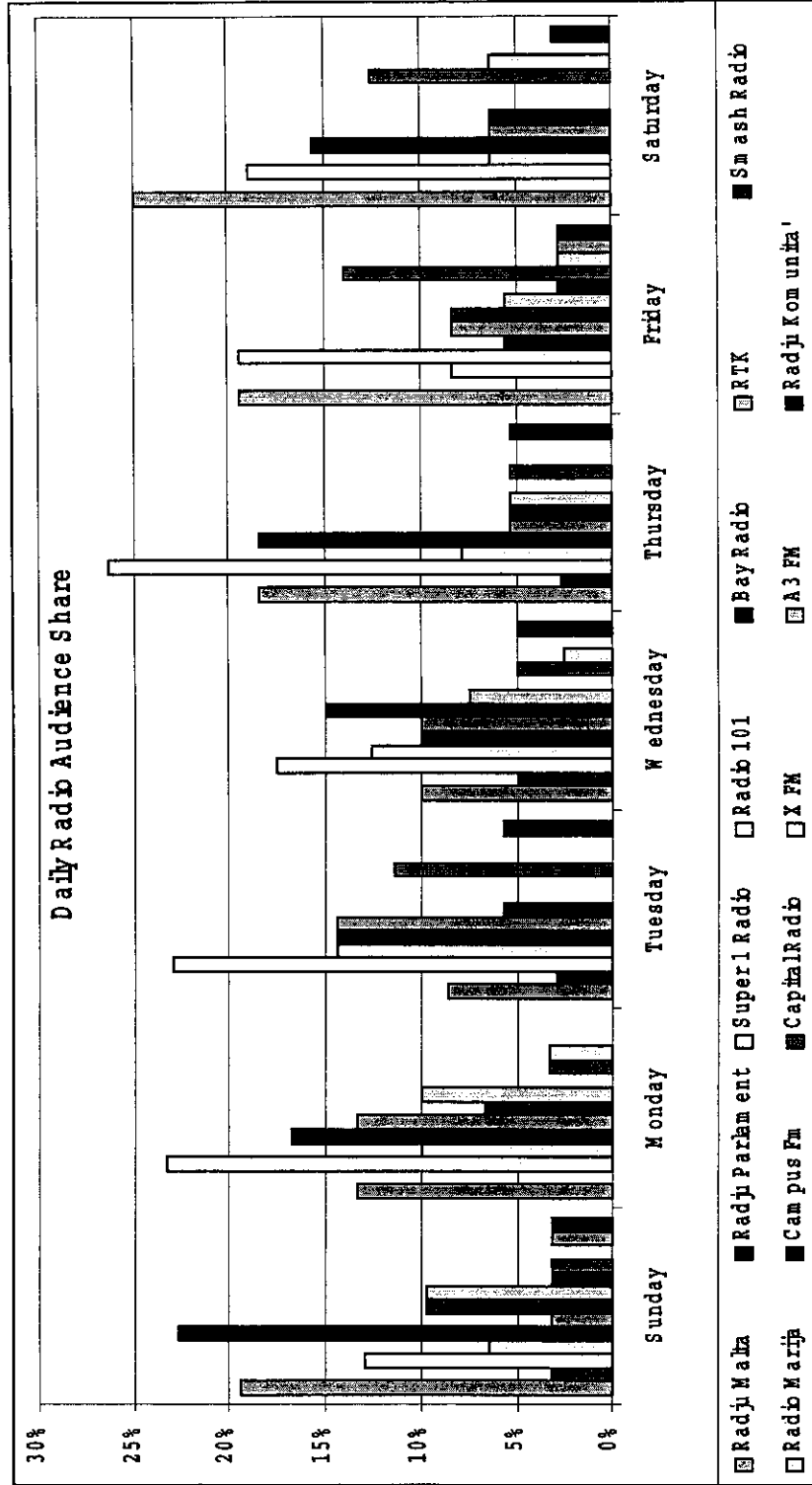
Radju Malta – 16.1% Bay Radio – 14.5% Radio 101 – 11.2%

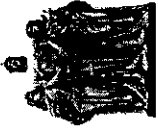




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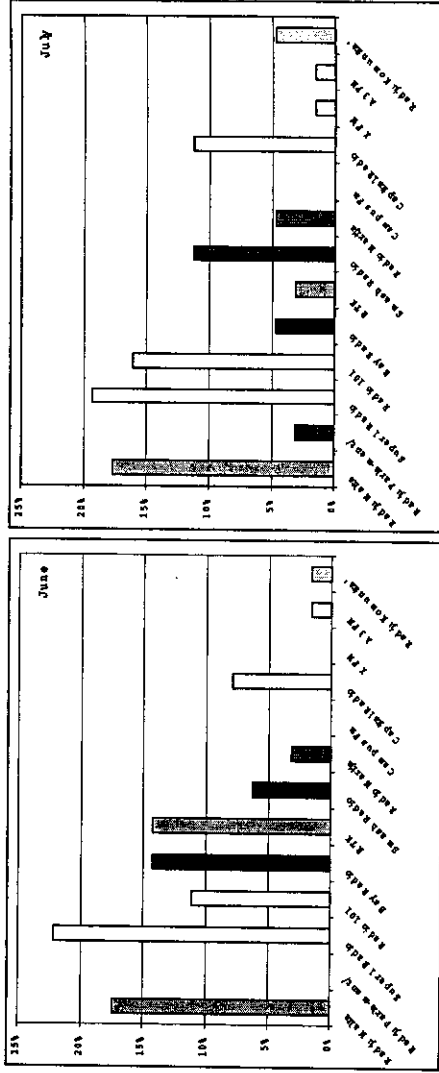
# Radio Audience Analysis



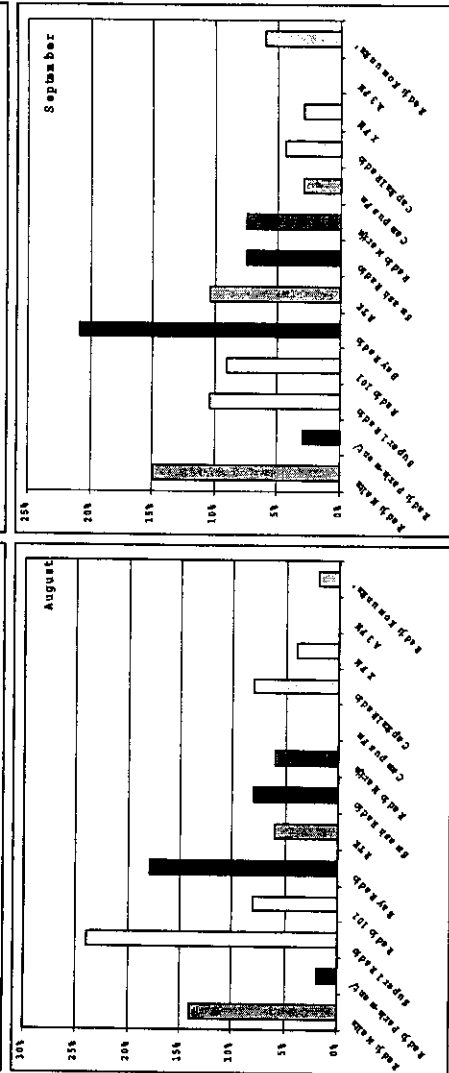


## Radio Audience Analysis – By Month

**Super One Radio**  
 -1st June, July, August



**Bay Radio**  
 -1st September  
 -3rd June, August



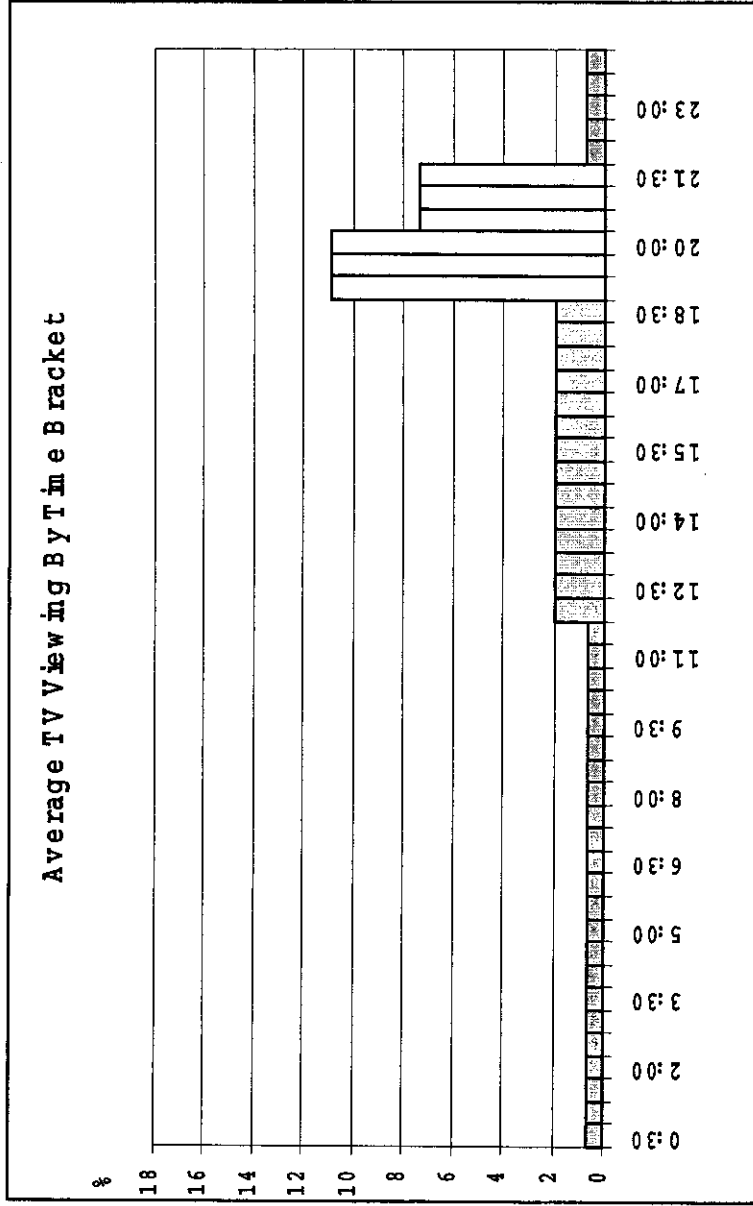
**Radju Malta**  
 -2nd June-September

**RTK**  
 -3rd June, September

**Radio 101**  
 -3rd July



## TV Audience Analysis

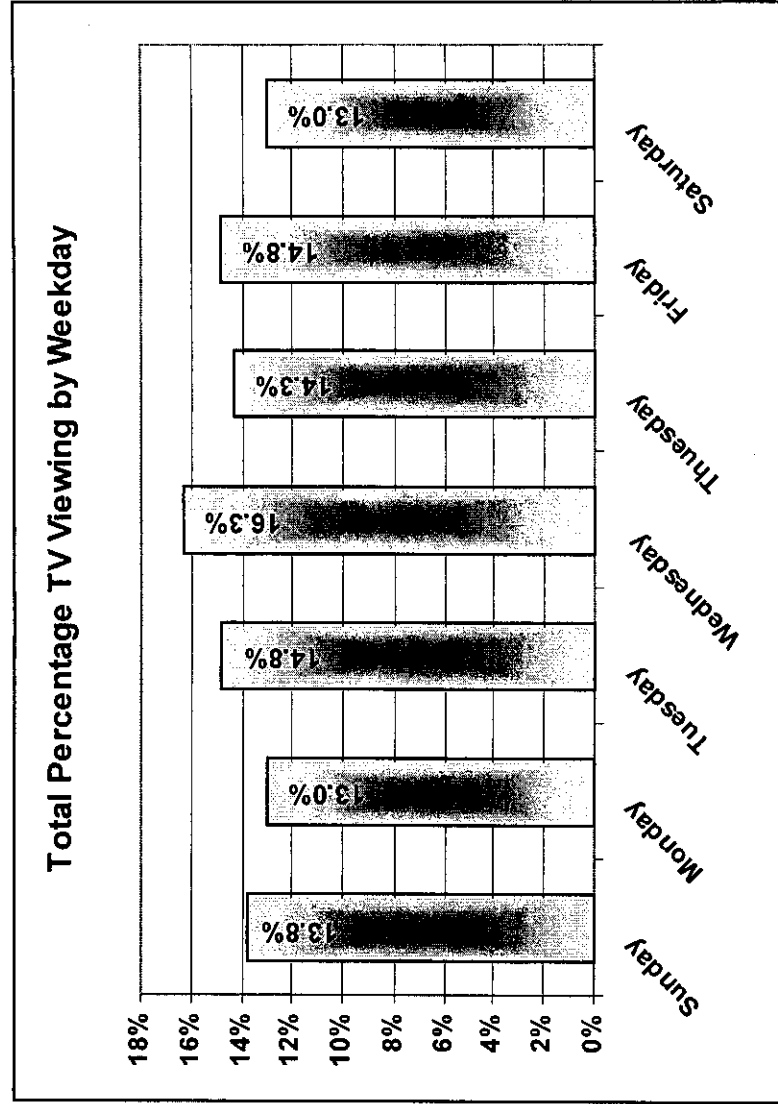


All TV Viewers	
Time Bands	All %
Before 12:00	14.5%
12:00 – 19:00	27.3%
19:00 – 20:30	32.6%
20:30 – 22:00	22.1%
22:00 – 24:00	3.5%
20:00 – 24:00	%
Refusal	0%



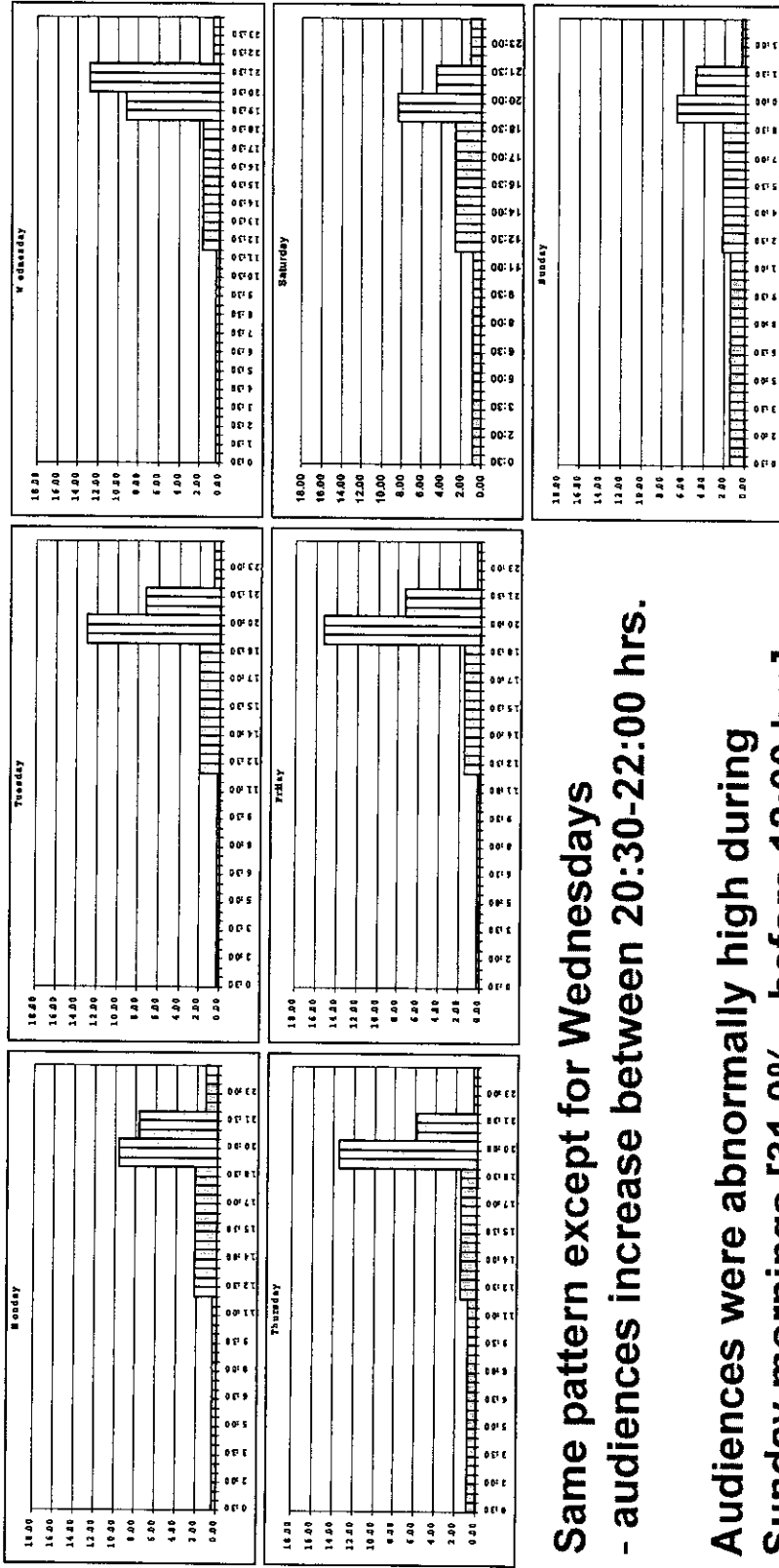
## TV Audience Analysis

The daily percentage of TV viewing was nearly constant within the whole week ranging from 13.0% on Monday to 16.3% on Wednesday





## TV Audience Analysis By weekday



**Same pattern except for Wednesdays  
 - audiences increase between 20:30-22:00 hrs.**

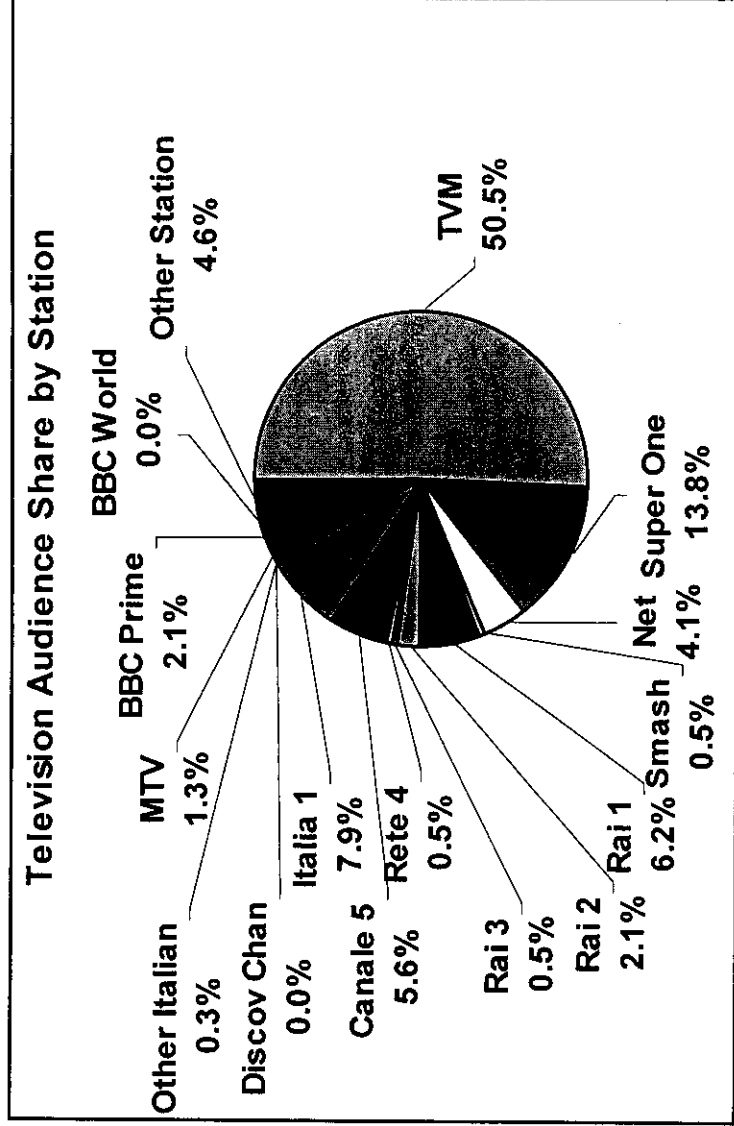
**Audiences were abnormally high during  
 Sunday mornings [31.0% - before 12:00 hrs]**



## TV Audience Analysis

**TVM registered the highest share [50.5%] with the highest daily total on Tuesdays.**

**Super One TV – 13.8%, Thursdays** **NET TV – 4.1%, Wednesdays**  
**Italia 1 – 7.9%, Wednesdays & Saturdays** **RAI 1 – 6.2%, Thursdays**

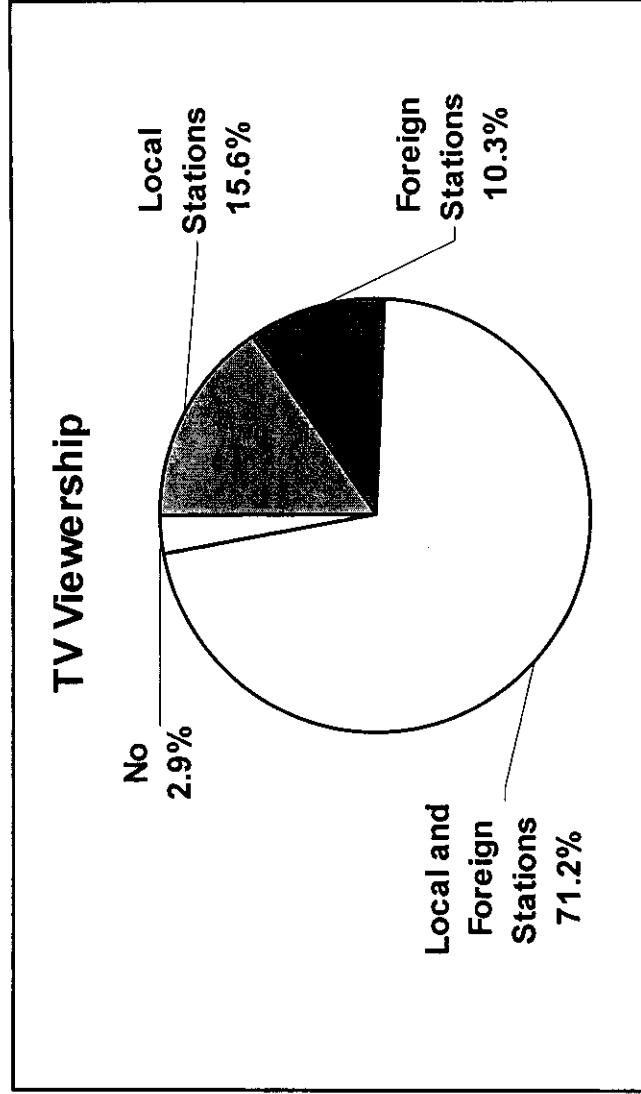






## Listening and Viewing Patterns - Television

**TV Viewing was slightly lower at 97.1%**  
**April 2003 – 99.4%**  
**October 2003 – 99.3%**



## Listening and Viewing Patterns

### Favorite TV Station:

**Local Stations: TVM [16.2%] followed by Super One TV [14.4%]**

**Foreign Stations: Italia 1 [13.2%] followed by Canale 5 [9.5%]**

**22.4% stated that they do not have any preferred station**



Table 2.2 – Favorite TV Station

TVM	16.2%
Super One	14.4%
Net	5.0%
Smash	0.2%
Rai 1	3.7%
Rai 2	0.7%
Rai 3	0.2%
Rete 4	0.9%
Canale 5	9.5%
Italia 1	13.2%
Other Italian Station	0.2%
Discovery Channel	2.1%
MTV	1.9%
BBC Prime	2.6%
BBC World	0.2%
Other Stations	6.5%
No favorite station	22.4%
<b>Total</b>	<b>100%</b>



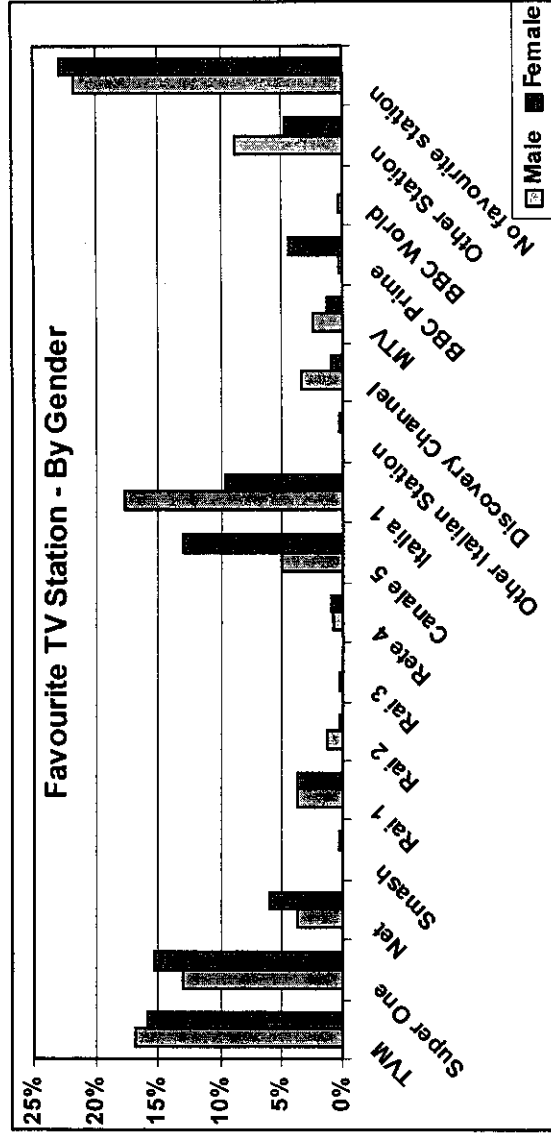
## Listening and Viewing Patterns

### Favorite TV Station by Gender:

#### Local Stations:

- Super One TV, Net TV, and Smash TV attract more females than males.
- TVM and Other Stations attract more males than females

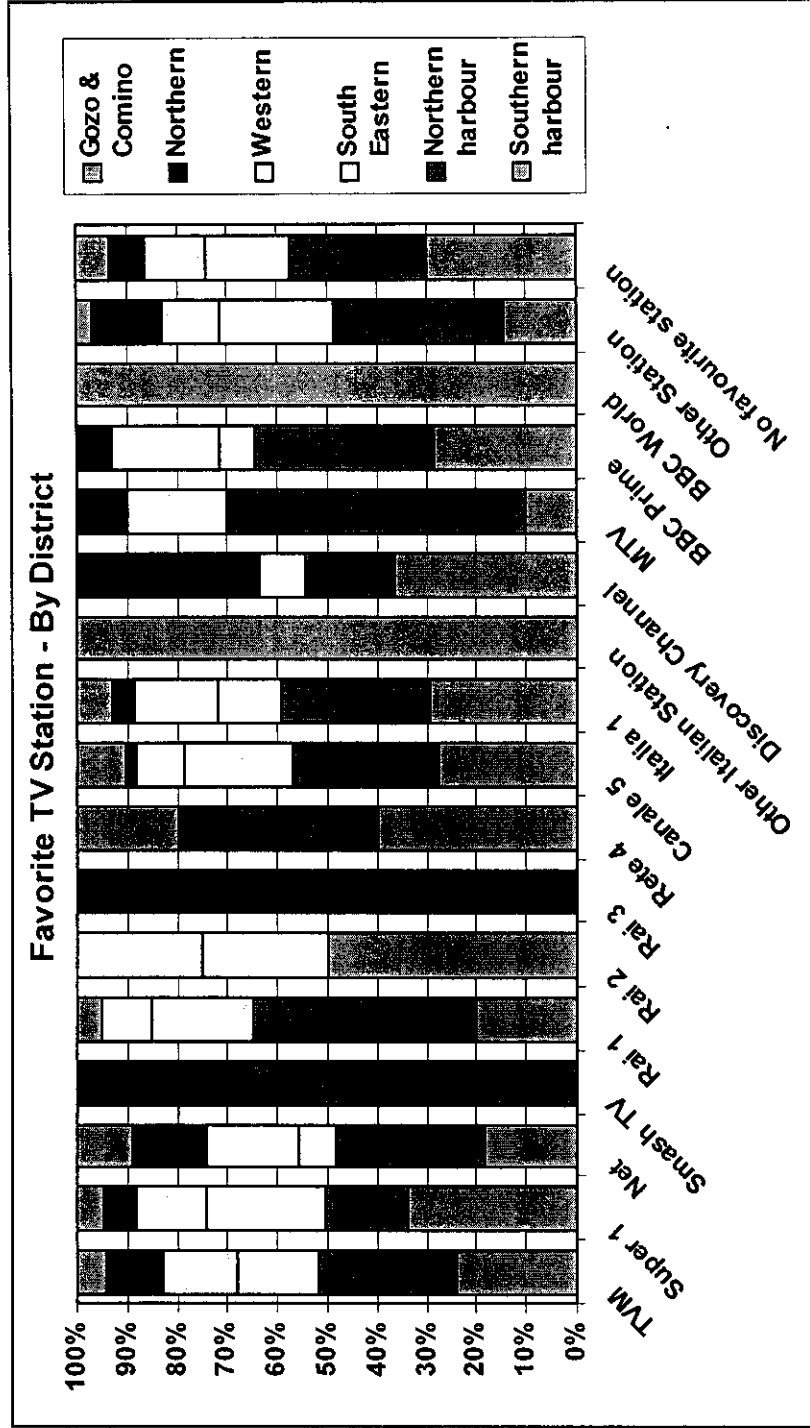
### Foreign Stations: Rai 1, 2, 3, and Italia 1 attract more males

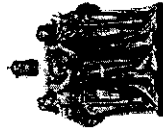




# Listening and Viewing Patterns

## Favorite TV Station by District:





## Listening and Viewing Patterns

### Favorite TV Station by District:

- TVM – first in four districts and second in two districts**
- Super One TV – first in Southern Harbour and South Eastern and second in Northern and Gozo**
- Italia 1 and Canale 5 ranked first with TVM in Gozo**
- Italia 1 ranked second in the Southern Harbour, Northern Harbour and in the Western districts**



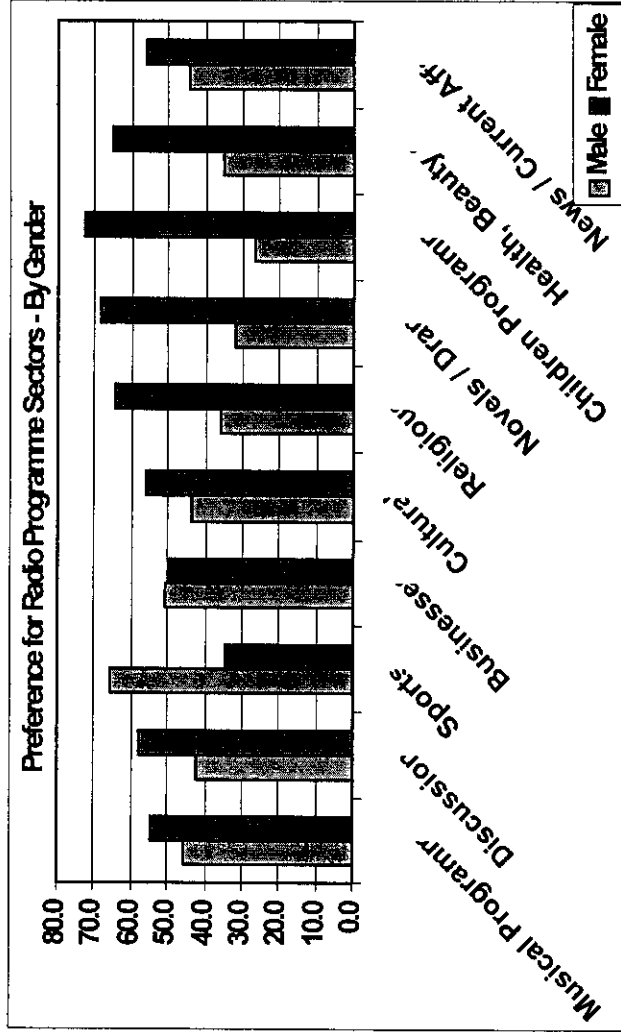
## Programme Preferences

### Radio Programmes:

Of all the ten radio programme sectors,  
**Sports [65.7% M – 34.3% F]**  
**Business [50.6% M – 49.4% F]**

Table 3.1 General Preferences

Programme Sector	%
News / Current Affairs	87.9
Musical Programmes	85.8
Health, Beauty etc	68.2
Religious	59.0
Discussions	52.9
Cultural	50.6
Novels / Drama	42.8
Sports	39.4
Children Programmes	34.8
Businesses	19.0







## Programme Preferences

### Radio Programmes

- Super One Radio – highest score for eight programme sectors and second best score in Business programmes and Childrens’ Programmes**
- Radju Malta got best score for Childrens’ Programmes and second score in seven other programme sectors**
- Bay Radio got a second score in Musical Programmes and in Sports Programmes**

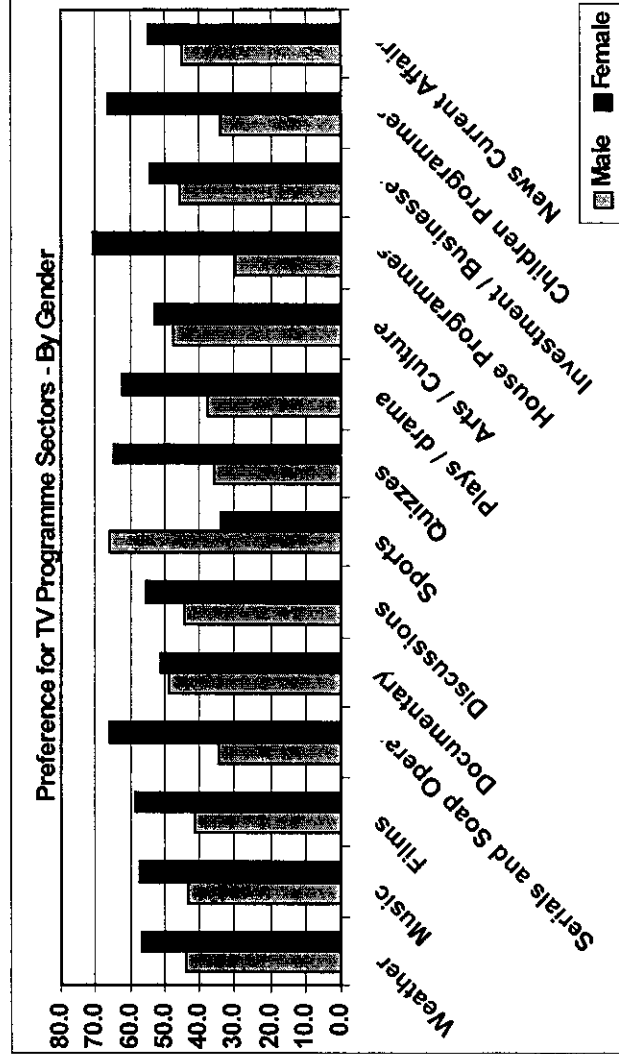


## Programme Preferences TV Programmes

Of all the 14 TV programme sectors,  
 Sports [66.1% M – 33.9% F]

Table 3.3 General Preferences

Programme Sector	%
News and Current Affairs	91.0
Weather	84.1
Plays / drama	76.0
Discussions	69.7
Documentary	61.8
House Programmes	58.0
Quizzes	55.9
Films	55.5
Serials and Soap Operas	52.8
Arts / Culture	50.1
Music	49.1
Sports	45.5
Children Programmes	42.8
Investment / Businesses	22.3







## Programme Preferences

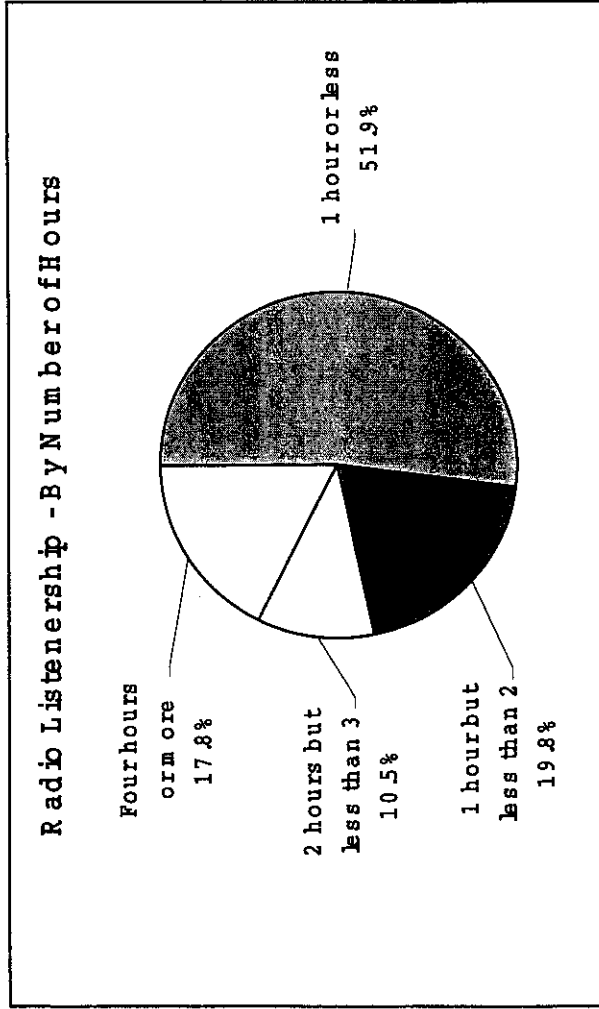
### TV Programmes

- TVM – highest score for all programme sectors except for Music where it ranked third with Italia 1**
- Super One TV – first for music programmes and second for the rest except for Investment/Business programmes [third]**
- Italia 1 ranked second for music and third for the rest with the exception of Investment/Business [fourth]**
- Net TV ranked second in Investment/Business.**



## Radio Audience Analysis

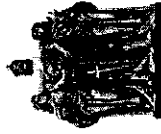
Respondents taking part were asked to state whether they had listened to radio the day before, for how many hours, for which time bracket and which station they listened to for at least 10 minutes.



	April 2003 %	Oct 2003 %
One hr	29.3	33.1
Two hrs	23.3	16.6
Three hrs	12.2	12.6
Four hrs +	35.2	37.7



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**THANK YOU**

