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PR 13/22

## **Audience Survey June 2022**

The Broadcasting Authority is pleased to announce that it has just issued the results of the audience assessment survey carried out in June 2022. The object of this periodic audience assessment survey is to assess the viewer/listenership of TV, radio and online content and identify the preferred source of local news amongst Maltese residents aged 12+ years. The dates of assessment comprised between Wednesday 8<sup>th</sup> – Tuesday 14<sup>th</sup> June 2022, both dates inclusive. The survey was conducted by M. FSADNI & Associates.

### **Research Methodology**

For this audience survey wave, the survey sample comprised 2,100 completed interviews. A total of 300 interviews per day were conducted over 7 consecutive days with Maltese residents aged 12+ years, hailing from Malta's six geographical regions (NSO, 2022).

The aggregate 2100-count audience survey sample produced statistically significant findings at a +/-2.13 confidence interval (margin of error) at a 95% confidence level.

The daily 300-count audience survey sample produced statistically significant findings at a +/- 5.66 confidence interval (margin of error) at a 95% confidence level.

All interviews were conducted by CATI (computer-assisted telephone interviews), using a structured research instrument to compile the data.

The research findings for TV viewership and radio listenership were extrapolated to reflect Malta's population. This was calculated on the most recent population statistics compiled by the National Statistics Office (NSO) in their recent publication "Census of Population and Housing 2021: Status report" (NSO, 18 March 2022). For this extrapolation exercise, non-TV viewers and non-radio listeners were proportionately deducted from Malta's population of individuals aged 12+ years (N=459,781).

Worthy of mention is that although the dates of assessment of this audience study were from Wednesday (8<sup>th</sup> June) to Tuesday (14<sup>th</sup> June), for sake of comparison with previous and future



BA audience surveys, the research findings throughout the whole report are presented from Monday to Sunday.

## Salient Research Findings

A synopsis of the salient research findings emanating from the audience survey now follows.

### TV Viewership, Radio Listenership & Online Viewership – An Overview

- ✓ 90% of Maltese residents are TV viewers. Of these, 54% watch both local and foreign TV, 26% watch local TV stations only and 9% watch foreign TV stations only.
- ✓ 2 in 3 Maltese residents are radio listeners (61%). This finding was observed across all age cohorts.
- ✓ 17% of Maltese residents watch online Maltese programmes, largely hailing from the younger age cohorts (12-30 years).

### TV Viewership

#### Favourite genre for local TV programmes

- ✓ **News** is the most favourite genre for local TV programmes, with 72.3% indicating this as one of their favourite genres. This genre was mentioned as one of the favourite genres by just at least 2 in 3 of TV viewers aged 31+ years.
- ✓ **Drama** is the second most favourite genre, with 45.7% indicating this as one of their favourite genres for local TV programmes. This genre is significantly more popular amongst female TV viewers (68.2%) as opposed to male TV viewers (21.4%).
- ✓ **Discussions and Current affairs** is the third most favourite genre for local TV programmes, with 30% indicating this as one of their preferred genres.

#### Most Followed TV Stations: Monday to Sunday

All of Malta's TV Viewers were given the possibility of **mentioning up to three TV stations they watched on the previous day**. Out of a total of 1881 TV viewers, 1 in 5 viewers (20.8%) said that they did not watch any television on the previous day.

- ✓ **TVM is the most watched TV station**, with 47.9% of all TV viewers mentioning TVM as one of the three TV stations they watched on the previous day. TVM is, in fact, the most watched local station across all age cohorts and gender.

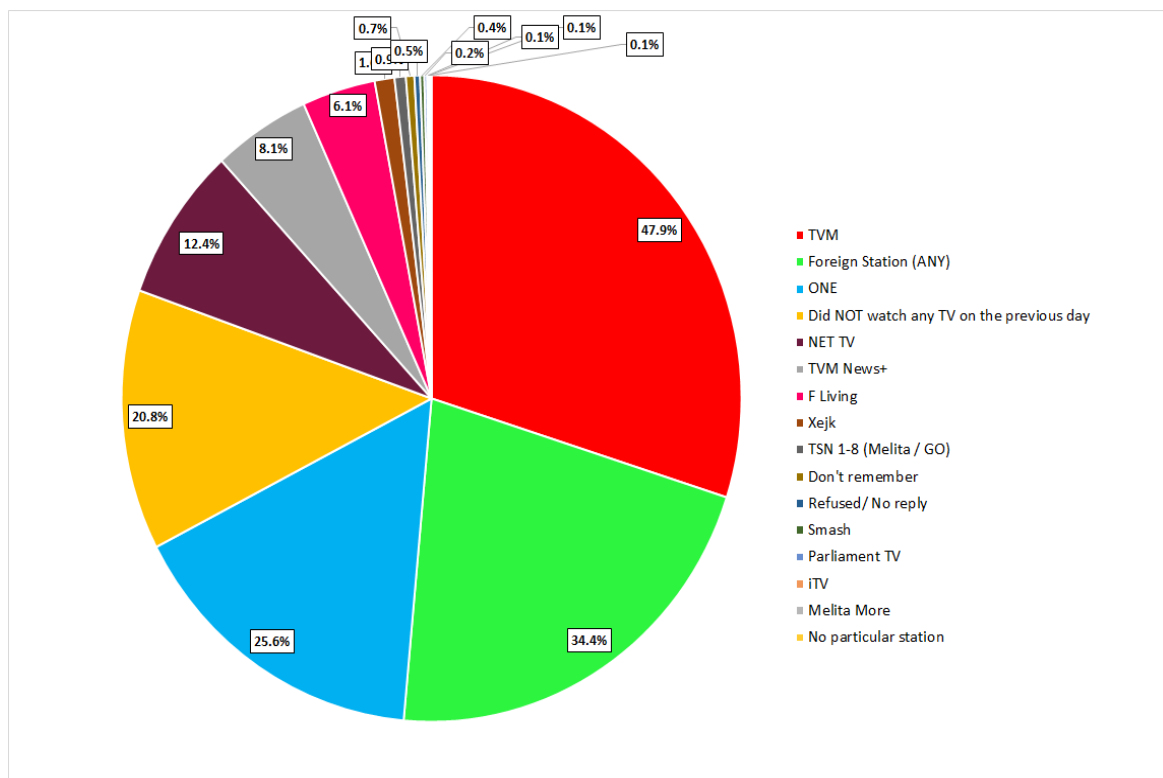


- ✓ **Foreign stations (any) are the second most followed**, with 34.4% having watched a foreign TV station on the previous day.
- ✓ **ONE is the third most followed TV station**, with 1 in 4 TV viewers (25.6%) mentioning ONE as one of the TV stations they watched on the previous day. ONE is mostly followed by the older age cohort TV viewers aged 41+ years.
- ✓ **NET TV is the fourth most followed TV station**, with 12.4% having watched this station on the previous day. NET TV is also mostly followed by the older age cohort TV viewers aged 41+ years.

**Exhibit 1** below depicts more details on the most following TV stations (Monday to Sunday).

**Exhibit 1 – Most followed TV stations (Monday to Sunday)  
(Multiple-Response Q) (n=1881)**

**NOTE:** Respondents were given the possibility of mentioning up to 3 TV Stations which they had watched on the previous day. Hence, the percentages depicted in this table do NOT total up to 100%.



**Exhibit 1** illustrates the most followed TV stations during Week 8<sup>th</sup> – 14<sup>th</sup> June 2022. 'Did not watch any TV on the previous day' refers to TV viewers who did not watch TV on the day of assessment during that particular week.

**Note:** TV stations not featured in the Exhibit above have a TV viewership of less than 0.1% Between Monday to Sunday.



### Most Followed TV Timebands: Monday to Sunday

All TV Viewers (excluding TV viewers who did not watch TV on the date of assessment) were asked to indicate **all timebands** during which they watched the three mentioned TV stations (including foreign stations) on the previous day.

- ✓ **The three most followed TV timebands** from Monday to Sunday are:
  - 20:00 - 20:30 (216,796 TV viewers)
  - 21:00 - 21:30 (172,176 TV viewers)
  - 20:30 - 21:00 (169,751 TV viewers).

### Favourite Local TV Programme

- ✓ 13.9% **do not have a favourite local TV programme.**
- ✓ **TVM's news bulletin** is the most favourite local TV programme of 13.5% of all local TV viewers. Worthy of mention is the TVM news bulletin was largely watched on station TVM and not on TVMnews+. However, on Thursday and Sunday of the week of assessment in question, TVMnews+'s audience share during the 20:00 news bulletin was higher than usual, given that this bulletin (on TVMnews+) was followed by UEFA Nations league football matches.
- ✓ **Liquorish** is the second most favourite TV programme with 11% of all local TV viewers.

### Population Average Audience Share by Weekday and by Station

From the daily TV viewership findings, **the population average audience share by weekday and by station was drawn up.** This daily average audience share has been derived by totalling the aggregate daily viewership obtained by each TV station and dividing this by the number of timeslots. This daily average audience share for each TV station has been presented in figures and percentages, depicted in **Tables 1 and 2** below.

- ✓ On Monday, Tuesday, Thursday and Friday, the highest daily average audience share was obtained by **foreign station (any)**, attaining a daily average TV viewership ranging between 11,615 – 14769, which is equivalent to a percentage average daily TV viewership between 29.6% - 40.4% on these days. On all four days, **TVM** followed second with a daily average TV viewership ranging between 8,551 – 9,422 (20.9% - 28.9%).
- ✓ On Wednesday, Saturday and Sunday, the highest daily average audience share was attained by **TVM** with a daily average TV viewership ranging between 11,093 – 16,164 (30.2% - 43.5%).



**Table 1 – Q8 – TV - Population Average Audience Share By Weekday and By Station**

	TVM	ONE	NET TV	Smash	TVM NEWS+	F Living	Xejk	ITV	Parliament TV	Melita More	TSN 1-8 (Melita / GO)	Foreign station (ANY)	Total
Monday	8,798	8,699	2,718	494	247	1,186	346	0	198	0	692	11,615	34,994
Tuesday	9,260	6,447	2,227	176	527	1,524	645	0	0	0	938	14,769	36,512
Wednesday	11,093	10,226	2,022	116	1,502	5,662	462	0	0	0	0	5,604	36,688
Thursday	8,551	5,479	3,155	0	7,222	3,902	498	0	0	83	0	12,120	41,010
Friday	9,422	6,057	1,058	0	769	2,500	0	192	0	0	385	12,210	32,591
Saturday	16,164	3,270	3,083	0	1,402	187	187	0	0	0	0	12,894	37,187
Sunday	11,935	4,092	2,387	0	7,587	85	85	0	0	0	341	9,804	36,316

**Table 2 – Q8 – TV – Percentage Average Audience Share By Weekday and By Station**

	TVM	ONE	NET TV	Smash	TVM NEWS+	F Living	Xejk	ITV	Parliament TV	Melita More	TSN 1-8 (Melita / GO)	Foreign station (ANY)
Monday	25.1%	24.9%	7.8%	1.4%	0.7%	3.4%	1.0%	0.0%	0.6%	0.0%	2.0%	33.2%
Tuesday	25.4%	17.7%	6.1%	0.5%	1.4%	4.2%	1.8%	0.0%	0.0%	0.0%	2.6%	40.4%
Wednesday	30.2%	27.9%	5.5%	0.3%	4.1%	15.4%	1.3%	0.0%	0.0%	0.0%	0.0%	15.3%
Thursday	20.9%	13.4%	7.7%	0.0%	17.6%	9.5%	1.2%	0.0%	0.0%	0.2%	0.0%	29.6%
Friday	28.9%	18.6%	3.2%	0.0%	2.4%	7.7%	0.0%	0.6%	0.0%	0.0%	1.2%	37.5%
Saturday	43.5%	8.8%	8.3%	0.0%	3.8%	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%	34.7%
Sunday	32.9%	11.3%	6.6%	0.0%	20.9%	0.2%	0.2%	0.0%	0.0%	0.0%	0.9%	27.0%
<b>Average</b>	<b>29.5%</b>	<b>17.5%</b>	<b>6.5%</b>	<b>0.3%</b>	<b>7.3%</b>	<b>5.8%</b>	<b>0.9%</b>	<b>0.1%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>1.0%</b>	<b>31.1%</b>

**Note:** TV stations with 'zero/0%' audience on a particular weekday in the Table above denotes that their viewership (on that day) was too low to be captured.

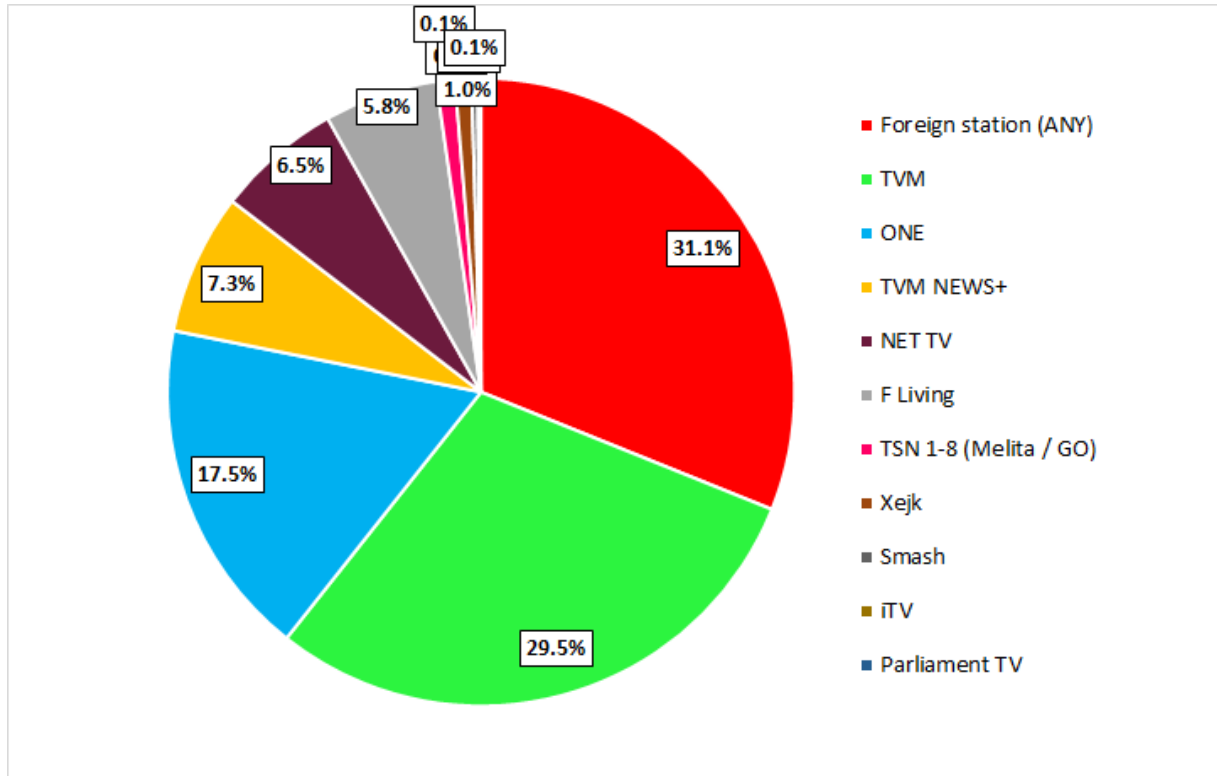
### Population Weekly Average Audience Share by TV Station

From **Table 2** above, the weekly average percentage audience share by TV Station may be derived. **Foreign station (any)** has a weekly average audience share of 31.1%. Among the local TV stations, **TVM** has the highest weekly average percentage audience share, standing at 29.5%, followed by **ONE** at 17.5%. More detailed findings may be found in **Exhibit 2** below.



**Exhibit 2 – Weekly Average Percentage Audience Share by TV station**

**NOTE:** % figures illustrated below are derived from Table 2 above



#### Types of TV reception services used for watching TV

- ✓ 92.5% of all 1881 TV viewers, use **'Paid Subscription'** as one of the reception services for watching TV. This is the most used reception service for watching TV across all age groups.
- ✓ 9% make use of **'IPTV'** as one of the reception services, whilst 7.7% use the **'Android Box'**.
- ✓ 1.1% use **'free-to-air'** as one of the reception services for watching TV.

#### Radio Listenership

##### Most Followed Radio Stations: Monday to Sunday

All radio listeners (excluding radio listeners who did not listen to radio on the dates of assessment) were given the possibility of mentioning **up to three radio stations they had listened to on the previous day**. 18.1% of radio listeners indicated that they did not listen to radio on the previous day.

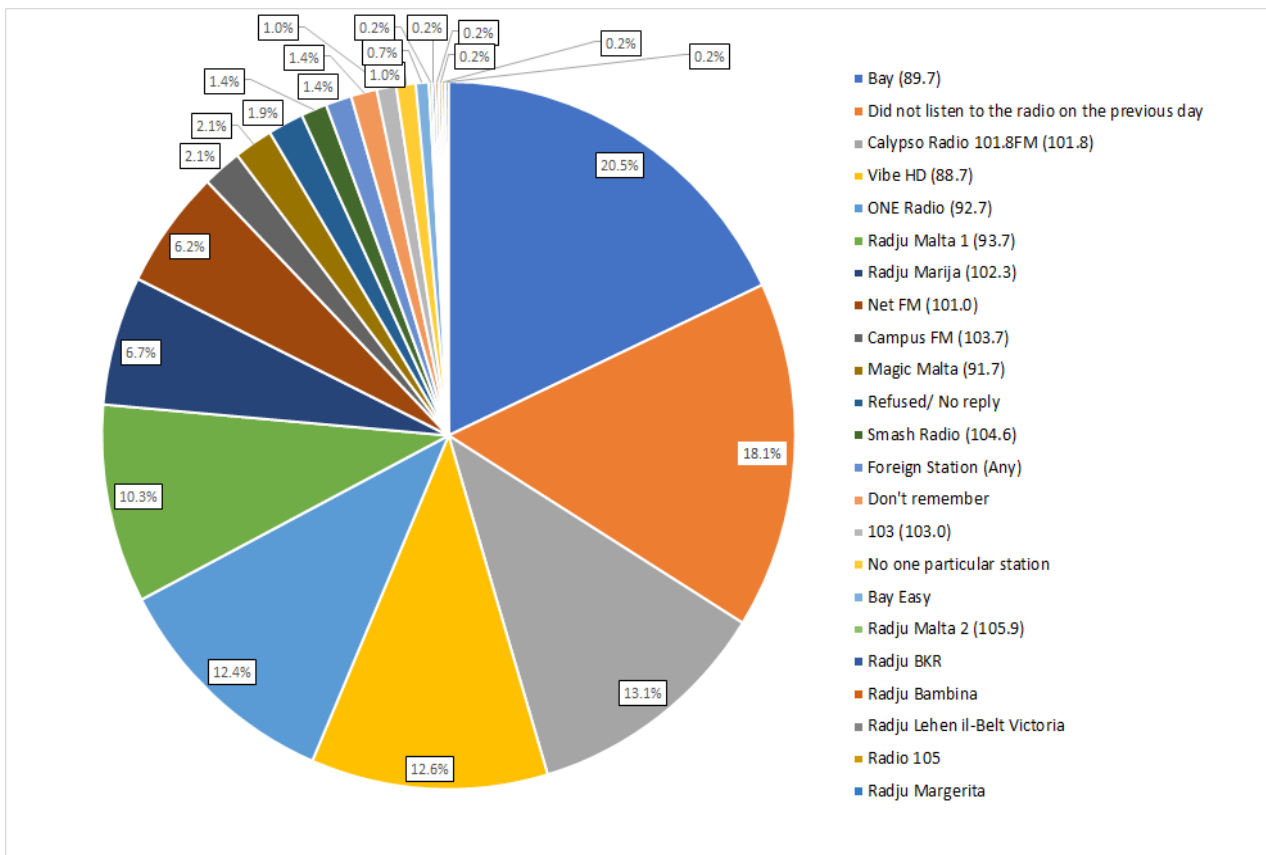


- ✓ **Bay** is the most followed radio station, with 20.5% of all radio listeners mentioning it as one of the three radio stations they had listened to on the previous day. Bay is largely popular with the younger cohorts, with most of its listeners being radio listeners aged 12 – 30 years.
- ✓ **Calypso Radio 101.8FM** is the second most followed radio station with an audience of 13.1%. Calypso Radio was mentioned largely by radio listeners aged 41+ years, as one of the radio stations they had listened to on the previous day.
- ✓ **Vibe FM** and **One Radio** are the third and fourth most followed radio stations with a respective audience of 12.6% and 12.4%.

Exhibit 3 below depicts more details on the most following TV stations (Monday to Sunday).

**Exhibit 3 – Q14 – Most followed Radio stations (Aggregate)  
(Multiple-Response Q) (n= 1285)**

**NOTE:** Respondents were given the possibility of mentioning up to 3 Radio Stations which they had listened to on the previous day. Hence, the percentages depicted in this table do NOT total up to 100%.





### Most Followed Radio Timebands: Monday to Sunday

All local radio listeners (excluding radio listeners who did not listen to radio on the dates of assessment) were asked to indicate all timebands during which they listened to the three mentioned radio stations (including foreign stations) on the previous day.

- ✓ Overall, across all radio stations, the three most followed radio timebands **from Monday to Sunday** are:
  - 08:00 – 08:30 (118,431 radio listeners)
  - 08:30 – 09:00 (108,641 radio listeners)
  - 09:00 – 09:30 (105,246 radio listeners).

### Favourite Local Radio Programme

- ✓ 11.9% of radio listeners **do not have a preferred local radio programme.**
- ✓ **Bay Breakfast with Daniel & Ylenia** is the most favourite local radio programme, with 17.1% mentioning it as their preferred local radio programme. This radio programme is largely preferred by the younger age cohorts, 12-40 years.
- ✓ **The Morning Vibe with Abel, JD & Martina** with 8% and **Bongu Calypso ma' Twanny Scerri** with 7.7% are the second and third most favourite local radio programmes. The former is listened to by the younger age cohorts (under 40 years old) and the latter is popular with the older age cohorts (41+ years old).

### Population Average Audience Share by Weekday and by Station

From the daily radio listenership findings presented, **the population average audience share by weekday and by station** were drawn up. This daily average audience share has been derived by totalling the aggregate daily listenership obtained by each radio station and dividing this by the number of timeslots. This daily average audience share for each radio station has been presented in figures and percentages and the weekly average percentage audience share by radio station are depicted in **Tables 3 and 4** below.

- ✓ The highest population **daily average audience shares** were obtained by **ONE Radio and Calypso Radio 101.8FM** on various weekdays, namely (average daily audience shares in figures and percentages):
  - ♦ **ONE Radio:** Monday: 3353 (19.8%), Tuesday: 5268 (25.7%), Thursday: 3257 (25.4%) and Saturday: 3065 (26.9%)
  - ♦ **Calypso Radio 101.8FM:** Wednesday: 3991 (23.7%), Friday: 3448 (23.9%) and Sunday: 2554 (34.2%).



**Table 3 - Q14 – RADIO - Population Average Audience Share By Weekday and By Station**

	103	Bay	Bay Easy	Calypso Radio 101.8FM	Campus FM	Magic Malta	Net FM	ONE Radio	Radju Malta 1	Radju Malta 2	Radju Marija	Smash Radio	Vibe HD	Radju BKR	Radju Bambina	Radju Lehen il-Belt Victoria	Radio 105	Radju Margerita	Foreign Station (any)
<b>Monday</b>	0	2,618	224	2,906	96	351	2,586	3,353	2,267	0	479	192	1,596	0	64	0	0	224	0
<b>Tuesday</b>	0	3,321	192	1,341	383	224	894	5,268	4,247	0	1,660	255	2,395	0	0	0	0	0	319
<b>Wednesday</b>	734	3,065	96	3,991	255	224	479	2,171	2,459	0	2,012	64	1,277	0	0	0	0	0	32
<b>Thursday</b>	255	1,405	192	2,937	607	0	1,309	3,257	1,405	255	575	64	543	0	0	0	0	0	0
<b>Friday</b>	0	1,086	0	3,448	415	575	415	3,416	2,586	0	255	64	1,884	0	0	64	0	0	224
<b>Saturday</b>	671	1,724	0	2,363	0	96	351	3,065	1,820	0	383	0	543	255	0	0	0	0	128
<b>Sunday</b>	0	862	0	2,554	0	32	128	639	702	0	926	32	1,054	0	0	0	32	0	511

**Table 4 - Q14 – RADIO – Percentage Average Audience Share By Weekday and By Station**

	103	Bay	Bay Easy	Calypso Radio 101.8FM	Campus FM	Magic Malta	Net FM	ONE Radio	Radju Malta 1	Radju Malta 2	Radju Marija	Smash Radio	Vibe HD	Radju BKR	Radju Bambina	Radju Lehen il-Belt Victoria	Radio 105	Radju Margerita	Foreign Station (any)
<b>Monday</b>	0.0%	15.4%	1.3%	17.1%	0.6%	2.1%	15.3%	19.8%	13.4%	0.0%	2.8%	1.1%	9.4%	0	0	0	0	0	0
<b>Tuesday</b>	0.0%	16.2%	0.9%	6.5%	1.9%	1.1%	4.4%	25.7%	20.7%	0.0%	8.1%	1.2%	11.7%	0	0	0	0	0	0
<b>Wednesday</b>	4.4%	18.2%	0.6%	23.7%	1.5%	1.3%	2.8%	12.9%	14.6%	0.0%	11.9%	0.4%	7.6%	0	0	0	0	0	0
<b>Thursday</b>	2.0%	11.0%	1.5%	22.9%	4.7%	0.0%	10.2%	25.4%	11.0%	2.0%	4.5%	0.5%	4.2%	0	0	0	0	0	0
<b>Friday</b>	0.0%	7.5%	0.0%	23.9%	2.9%	4.0%	2.9%	23.7%	17.9%	0.0%	1.8%	0.4%	13.1%	0	0	0	0	0	0
<b>Saturday</b>	5.9%	15.1%	0.0%	20.7%	0.0%	0.8%	3.1%	26.9%	16.0%	0.0%	3.4%	0.0%	4.8%	0	0	0	0	0	0
<b>Sunday</b>	0.0%	11.5%	0.0%	34.2%	0.0%	0.4%	1.7%	8.5%	9.4%	0.0%	12.4%	0.4%	14.1%	0	0	0	0	0	0
<b>Average</b>	1.7%	13.6%	0.6%	21.3%	1.7%	1.4%	5.8%	20.4%	14.7%	0.3%	6.4%	0.6%	9.3%	0.3%	0.1%	0.1%	0.1%	0.2%	1.6%

**Note I:** Radio listeners were given the possibility of mentioning up to 3 radio stations on the weekday in question. For each radio station, these radio listeners were asked to indicate all time slots during which they listened to the mentioned radio station. **(Multiple-response Q)**

**Note II:** Radio stations with a “zero/0%” audience on a particular weekday in the Table above denotes that their listenership (on that day) was too low to be captured.



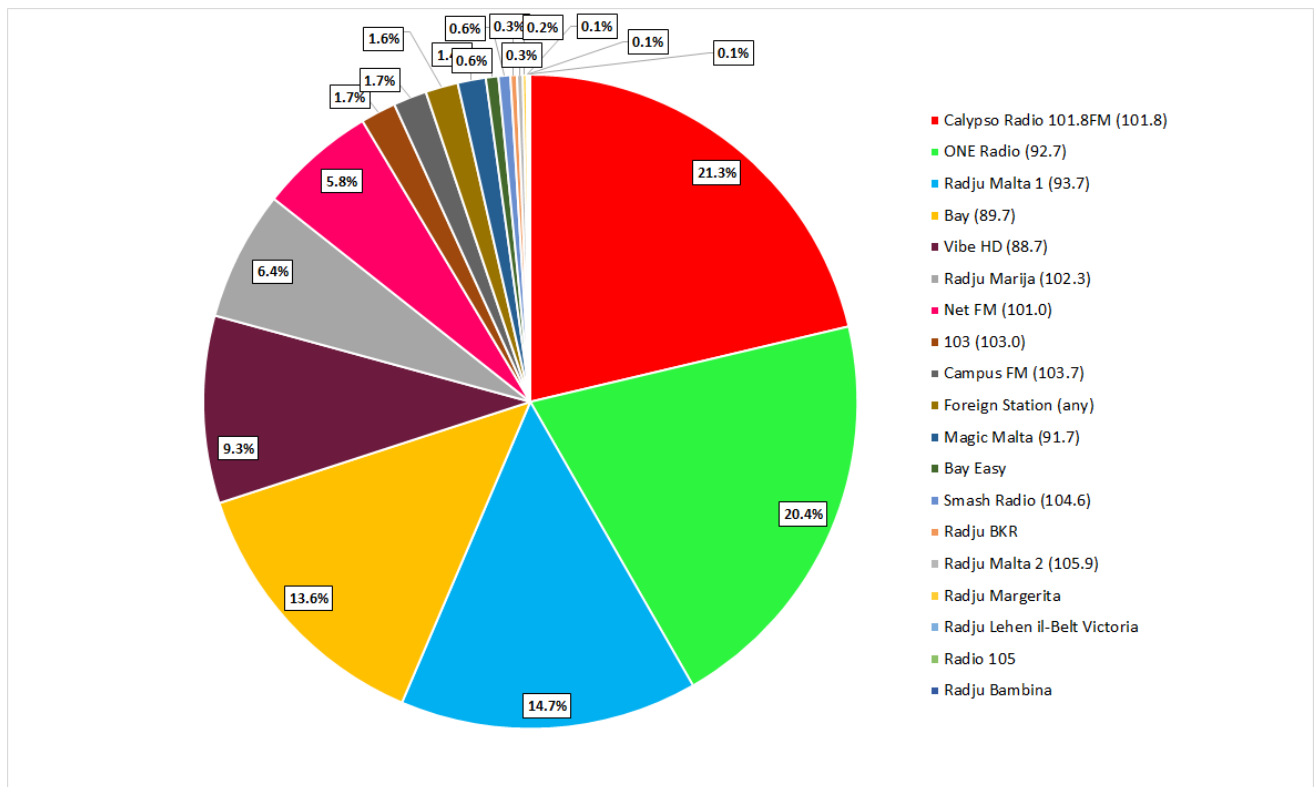
## Population Weekly Average Audience Share by Radio Station

From **Table 4** above, the weekly average percentage audience share by Radio Station may be derived. The local radio station with the highest weekly average percentage audience share is **Calypso Radio 101.8FM** standing at 21.3%, followed by **One Radio** (20.4%), **Radju Malta 1** (14.7%) and **Bay** (13.6%). More detailed findings may be found in **Exhibit 4** below.

### **Exhibit 4 – Weekly Average Percentage Audience Share by Radio Station**

**NOTE 1: % figures illustrated below are derived from Table 4 above**

**Note:** Radio stations not depicted in this graphical illustration denotes that their listenership was too low to be captured.



## Types of Radio Reception Services used for Listening to Radio

- ✓ 91.7% of all radio listeners use the **radio set** (at home, office, in car, etc) as one of the radio reception services for listening to radio. This is the most used radio reception service by radio listeners across all age groups.
- ✓ 5% use **DAB+** as one of the radio reception services for listening to radio, with this being mostly used by radio listeners aged 12 – 50 years.



## Online Viewership

**NB.** The term ‘online Maltese programmes’ refers to Maltese programmes produced solely for online portals, which cannot be watched on traditional TV.

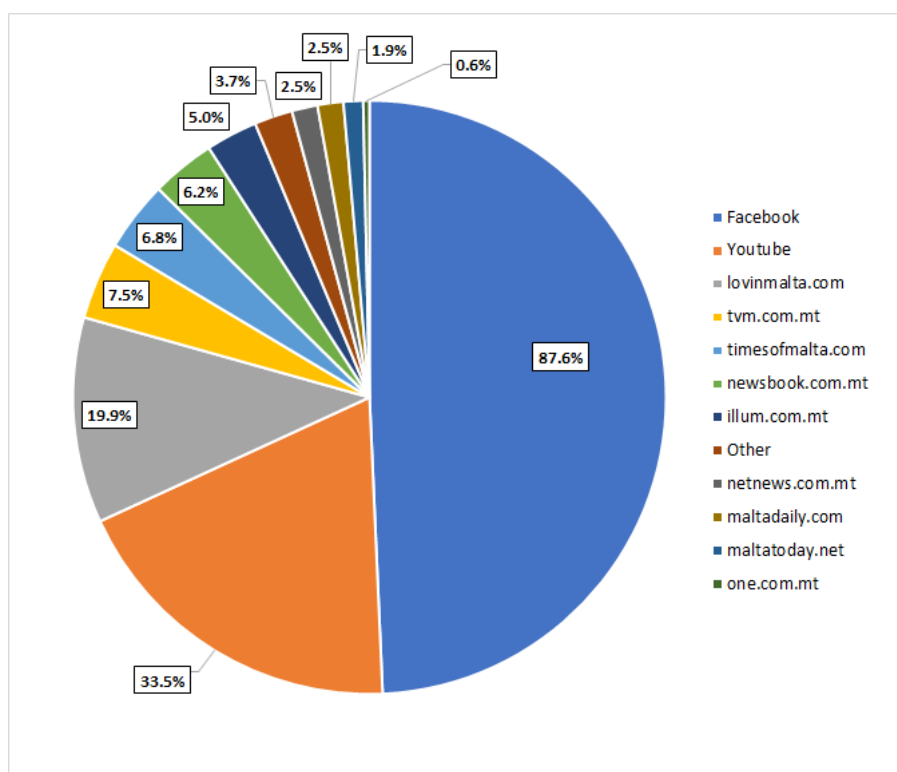
- ✓ 83% of all Maltese residents, **do not watch any Maltese programmes that are solely produced for online portals.** This finding is more evident with individuals aged 31+ years.
- ✓ The remaining 17% **watch online Maltese programmes.** The younger age cohorts (12-30 years), seem more inclined to watch these online Maltese programmes than the older cohorts.

### Online Portals or Platforms Used for Watching Maltese Programmes Online

- ✓ **Facebook** is the most used platform for watching online Maltese programmes, with 87.6% of all online viewers mentioning it as one of the online platforms used for watching Maltese programmes online. This finding is evident across all age cohorts.
- ✓ Following, 33.5% use **Youtube** for watching online Maltese programmes.
- ✓ A further 19.9% use **lovinmalta.com** to watch online Maltese programmes.

**Exhibit 5 – Q19 – Online portal/s or platform/s used for watching Maltese programmes online (Multiple-Response Q) (n=357)**

**NOTE:** The %s below refer to the number of respondents and NOT to the number of responses, hence they do not total up to 100%





### Most Used Device For Watching Preferred Programme Online

- ✓ **Mobile** is the most used device for online viewers to watch their preferred programme online, with 90.1% indicating this device as their most used device. Mobile is the most used device across all age cohorts and gender.
- ✓ Following, 5% of online viewers use **laptop** and **tablet**, respectively.

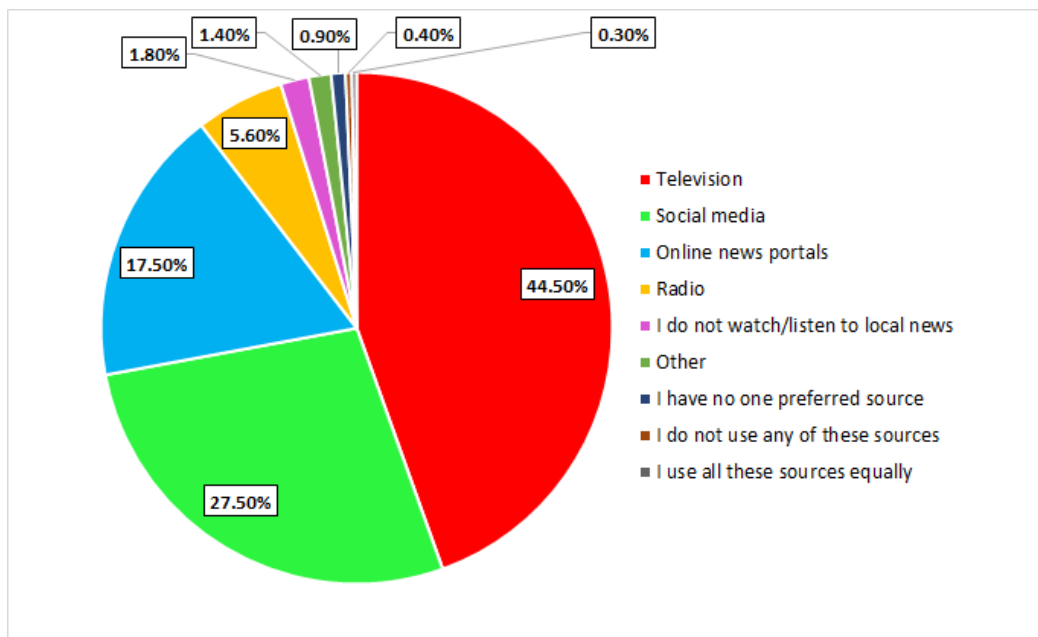
### Most Preferred Programme Online

- ✓ 39.8% of all online viewers **do not have a preferred local online programme**, while 9.3% have more than one preferred programme.
- ✓ **Jon Mallia Podcast/ Jon Jispjega/ Jon Mallia programme** are preferred by 18.7% online viewers.
- ✓ **Lovin Malta** is preferred by 18.6% of online viewers.

### Preferred Source For Local News

- ✓ **Television** is the preferred source for local news by 44.5% of all Maltese residents. This source is particularly popular amongst individuals aged 41+ years.
- ✓ **Social media** is preferred by 27.5%. Social media users are largely the younger cohorts aged up to 40 years.
- ✓ **Online news portals** are preferred by 17.5%
- ✓ **Radio** is preferred by 5.6%.

Exhibit 6 – Preferred Source for Local News





### Preferred Source to Obtain Local News

- ✓ **Television** is the most preferred source of local news followers to obtain local news, with 44.5% of all Maltese residents mentioning television as their preferred source.
  - ◆ 55% of all those whose preferred source for obtaining local news is 'Television', mentioned **TVM** as their most preferred local TV station for watching local news. TVM is the most preferred station for local news by individuals across all age groups.
  - ◆ **ONE** is the second most preferred local TV station for watching local news, with 24.9% mentioning this station as their preferred local station for watching local news. ONE is mostly popular with TV viewers aged 31+ years.
  - ◆ **NET TV** is the third most preferred local TV station for watching local news, and this was mentioned by 11.4% as the preferred local TV station for watching local news.
  
- ✓ **Online news portals** are the third most preferred source for obtaining local news, with 17.5% mentioning this as their preferred source for obtaining local news.
  - ◆ Just over half of all individuals (51.8%), who prefer local news portals for following local news, mentioned **timesomalta.com** as their preferred local news portal, making it the most preferred local news portal for following local news, across all age groups and gender.
  - ◆ Following, **tvm.com.mt** is the second most preferred local news portal for following local news, with 9.6% mentioning this as their preferred local news portal.
  
- ✓ **Radio** is the fourth most preferred source for obtaining local news with 5.6%.
  - ◆ 41.5% individuals whose preferred source for obtaining local news is 'Radio', mentioned **Radju Malta 1** as their most preferred local radio station.
  - ◆ 20.8% prefer **ONE Radio** as their most preferred source for obtaining local news.
  - ◆ 11.3% mentioned **Calypso Radio 101.8FM** as their most preferred local radio to obtaining local news.

The full version of the results of the survey can be downloaded from the Authority's website: [www.ba.org.mt](http://www.ba.org.mt) under '*Latest Reports*'.

9<sup>th</sup> August 2022