National Digital Transition Readiness

Survey Report

8 March 2023

BIZECT CONSULTING

ALWAYS ONE STEP AHEAD

CONTENTS

Executive Summary & Recommendations

Digital TV encoding allows stations to transmit better quality data at faster rates. This means higher definition video and better sound quality than analogue, as well as allowing the option of programming multiple digital subchannels, or multicasting. Digital signals are less expensive when compared to analogue transmission, and reduce the bandwidth needed. This allows digital television to broadcast more channels; removing analogue frees up the spectrum that can instead be used for a range of services, such as mobile phone networks, or emergency and rescue services.

Digital Switchover (DSO) is the process of transitioning from analogue broadcast transmissions to digital transmissions. DSO has been a long ongoing process globally, with countries in different stages of transition. The Government of Jamaica declared a 2022 start date for the DSO process to the ATSC 3.0 standard.

Through this research exercise, the Broadcasting Commission sought a deeper understanding of the awareness, attitudes, needs and expectations of Jamaicans, and the demand factors that could drive their embrace of the switchover. These include the consumer equipment needed, the value propositions that the consumers place the greatest weight on, and other factors which will impact the evaluation of the nation's collective readiness for the DSO.

The findings presented herein are part of a quantitative exercise designed to determine the perception and awareness of the impending transition from analog to digital broadcasting, types and preferences of media consumption including local free-to-air (FTA) television, television penetration and rates of renewal, and support, capacity and willingness to switchover.

Face-to-face surveys were conducted by Bizect Consulting with a total sample size of two thousand and thirty-four (2,034) respondents. Respondents were selected from members of public and screened to ensure statistical representativeness of the target population, based on key demographic variables such as age, parish, and gender. This study has a margin of error of ±2% at a 95% Confidence Level.

Digital Switchover Perceptions and Impact

41%

Awareness of DSO

Ahead of the public awareness campaign about the DSO which will be launched imminently, awareness is low overall, with large variances across parishes. Awareness was also generally lower for younger persons (under 35 years old).

84%

Receptiveness to More Channels

Most persons would welcome having access to more local free-to-air television channels. Regional differences existed, with receptivity higher among rural communities, those at lower socioeconomic levels, older persons, persons with disabilities, and parents.

62%

Appeal of DSO

'Free to access' was the top perceived benefit of the DSO, cited by 62% of survey respondents. 'Greater choice and variety' and 'Free access to educational material' were also appealing to roughly 50%.

74%

Willingness to Upgrade Devices

Interest in ATSC 3.0 digital set-top boxes, televisions, or smartphones to access free-to-air television channels is high overall, averaging 74% of persons surveyed.

23%

Readiness for DSO

While willingness is high, only 23% of survey clients would be able to upgrade their devices right away. Just over a quarter would need one to three months to prepare, and one half would wait at least four months.

$5000

Willingness to Pay for Devices

Six out of every ten persons would only be able or willing to buy a set-top box costing JMD $5,000 or less, and/or a television costing $80,000 or less.

Media Access

96%

Television Penetration

Household television access is almost ubiquitous at 96% overall. These were largely digital, with 95% of households owning at least one digital television. While there were no notable differences in TV ownership by age groups, age is a factor in ownership of analogue TVs.

87%

Internet Access

Household internet is widespread, with 87% of persons overall reporting access. Variance exists by age group (91% among young people under 34, compared to 74% for those over 55 years) and by parish (>90% in KSA and St Catherine, but only 60% in St. Elizabeth and 75% in Portland).

61%

Access to FTA channels

61% of respondents said they watched local FTA television regularly with 33% consuming these mediums most often. 34% watched programmes online, 28% via cable boxes, 26% used outdoor antenna, and 12% used indoor antennae (rabbit ears).

24%

Use of Analogue televisions

Ownership of analogue televisions varies widely across parishes, with the highest rates in Portland (42%) and the lowest in Clarendon (11%). Persons over 55 years old were almost twice as likely to have an analogue TV (34%) than those under 44 (18%).

50%

Usage of Digital Receivers

One half of respondents had cable subscription and/or android boxes or other digital set top boxes or attachments allowing access to the internet.

75%

Resistance to Television Renewal

Renewal rates were low, with three quarters of all respondents saying that they only replaced their televisions when they were no longer usable or when repair costs were prohibitive. Only 4% chose to upgrade their televisions in accordance with new models or technological advancements.

FTA TV Value Proposition

What value propositions of Free-to-Air Broadcast Television do Jamaican consumers find most important?

The 61% of respondents who watch local television value it first and foremost for its **cost-effectiveness.** Consumers do not have to pay subscription fees or other charges to access the content. While viewership is down across most demographics, local FTA TV remains an affordable option for consumers who do not want to, or cannot afford to, pay for streaming platforms or more expensive cable packages.

Free-to-air broadcast television is also widely available and **accessible** to anyone with a TV set and an antenna or cable box. Consumers do not need an internet connection or any other additional equipment to access the content, making it a convenient option. When asked about potential drawbacks of switching to digital transmission, some individuals pointed out that it 'sounds like digital will mean a reliance on internet'. These persons were hesitant or skeptical of DSO because of this association. It may therefore be important to point out the following in simple terms as part of the awareness campaign:

- Inconsistent or unreliable service from internet providers will not impact consumers' ability to access FTA channels
- Digital broadcast television uses a different transmission technology. It does not rely on an internet connection to deliver content to viewers, so viewers do not need to have internet access to watch free-to-air digital broadcast television.

Importance of Representation in Media

39% of respondents say they **primarily focus on content rather than representation** in the television shows they watch.

Among those who valued representation, commonalities in moral and ethical values, nationality and age were important among 23%, 21% and 18% of respondents, respectively. Television programming reflecting the same socioeconomic background and race were less important, cited by only 16% and 15% of respondents, respectively.

Reliance on FTA Broadcast Television

Some groups still rely on free-to-air broadcast television as their primary source of television content and programming. On average, 69% of those in **rural communities** watch local television and 53% watch this more often than other sources of television content, including streaming platforms. Similarly, in households with **persons with disabilities**, 72% of persons watch local TV channels and 42% watch it more than any other sources.

The percentage of persons who watch local television **increases with age group** (by roughly 10 percentage points per decade) from 40% of adults under 20 years, to 72% of those aged 45 to 54, 79% of those aged 55 to 59, and 89% of those aged 65 years older.

Programming and Content

What types of content and experience are Jamaican television consumers looking for?

The primary reason cited by 66% survey respondents for watching television is **entertainment.** Consumers are looking for engaging and captivating programming, such as comedy shows, drama series, reality TV shows, and game shows.

Consumers are also looking for reliable and up-to-date news coverage on a variety of topics, including local and national news, politics, business, etc. 63% cited **news and information** as their top reason for watching television. Television news programmes are preferred over any other media by 50% of respondents. Only 18% depend on social media in various formats or platforms as their primary source of news.

Among adults, 42% saw free educational/school content as a benefit of the DSO. This was higher among parents at 52%. Furthermore, educational programming, such as documentaries, science shows, and historical programs, is also popular among television consumers who want to learn and expand their knowledge. 34% of respondents opined that this was their preferred content, which they 'watched all the time'.

The most favoured television programme content categories or genres were 1. Action (46%), 2. Comedy (37%), 3. Sports (35%), 4. Educational (op. cit.) and 5. Drama (33%). Details on viewership of local FTA, local cable, and foreign cable channels and streaming platforms are provided in Section 3.

Preferred Viewership Model

Tolerance for advertisements is high overall, with 70% of respondents saying they have no issue with ads.

Furthermore, more respondents would choose free content with ads than paid content without. 42% prefer to watch television shows at no cost and with breaks for advertisements. 32% prefer to pay a low rate and accept ads. Only 27% overall prefer to pay to eliminate ads altogether.

Affordability, variety of programming, convenience and flexibility were more important to users of streaming platforms than lack of ads.

Interactivity and Engagement

Consumers are increasingly looking for interactive and engaging experiences while watching television. Just under half of respondents said they discusses TV programmes once to several times per week.

The advent of digital television would allow local broadcasters unprecedented ways to challenge the current growth trajectory of streaming platforms usage among the Jamaican populace. Features such as social media integration, live polling, second-screen experiences, gamification, real-time comments, and personalization of content would reenergize local FTA TV for younger viewers and help them to feel more connected to the medium, content and to other viewers.

Readiness for DSO

Support for the switchover to digital television was high, even prior to a full awareness campaign. 84% of Jamaicans surveyed said they would welcome having more channels and roughly **3** in every **4** persons willing to upgrade their set-top boxes or televisions. The consistency in the survey responses across most demographic groups provide evidence that there could national backing for the DSO among the public.

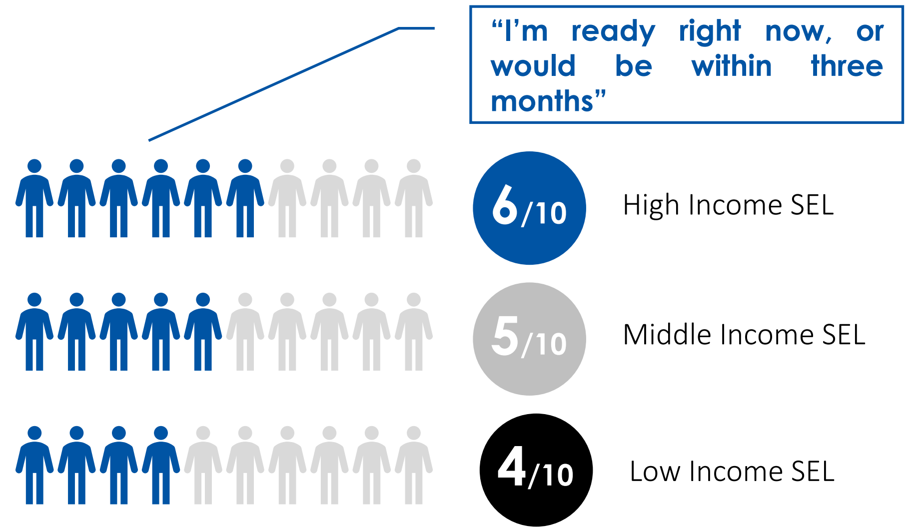
However, the average local consumer is price sensitive. Therefore **affordability and time for preparation will be key to maintaining a positive perception.**

Only 9% of respondents would be willing to spend $10,000 or more for a set-top box, with a further 6% saying they would not be willing to purchase at any price points. However, the majority (58%) would be willing to spend, provided it was under $5,000.

In contrast, based on the projected prices for ATSC 3.0 digital televisions starting in the JMD$80,000, acquiring this device may be out of reach to most Jamaicans. 63% said they would be willing to spend a maximum of $80,000. As 25% of respondents said they would not buy a new television (simply to access more free-to-air local tv channels at any price point), **only 13% of persons would be able to afford/willing to buy the ATSC 3.0 digital television.**

Targeting Through Advertisements

Respondents agreed that ads and public messaging was the best way to encourage support and preparation for the DSO. Their preferred media are **Television (47%)**, Social Media (33%), Newspapers (23%), and Radio (20%).



Four out of every ten respondents falling within the low socioeconomic level (SEL) group, and three in every ten respondents in the middle SEL group, say they would need six months to one year to prepare for device upgrades.

Unique Selling Proposition

The subsequent campaign should remind consumers who have widened their media consumption away from FTA TV of the many benefits offered by FTA broadcast television and the additional benefits which will be conferred by switching to digital which will make it even more attractive to consumers. Specific messaging could be developed for groups that already have high engagement with local television to increase buy-in, as well as among the general public.

General Public

Free-to-air broadcast television signals are reliable and consistent, unlike internet-based streaming services that can be affected by network congestion or other technical issues. Consumers can enjoy a seamless viewing experience without interruptions or buffering. Digital transmission would offer high-quality picture and sound, which is comparable to cable TV services. Consumers can enjoy their favorite shows and movies in high-definition without having to pay extra for premium channels. Unlike streaming platforms, Free-to-air broadcast television provides a platform for local community programming and news. Consumers can stay informed about local events, news, and community issues, which can help foster a sense of community engagement and connectedness.

In addition, digital television would be easily accessible and can be accessed from a variety of devices. This makes it convenient and cost-cutting.

Persons with Disabilities

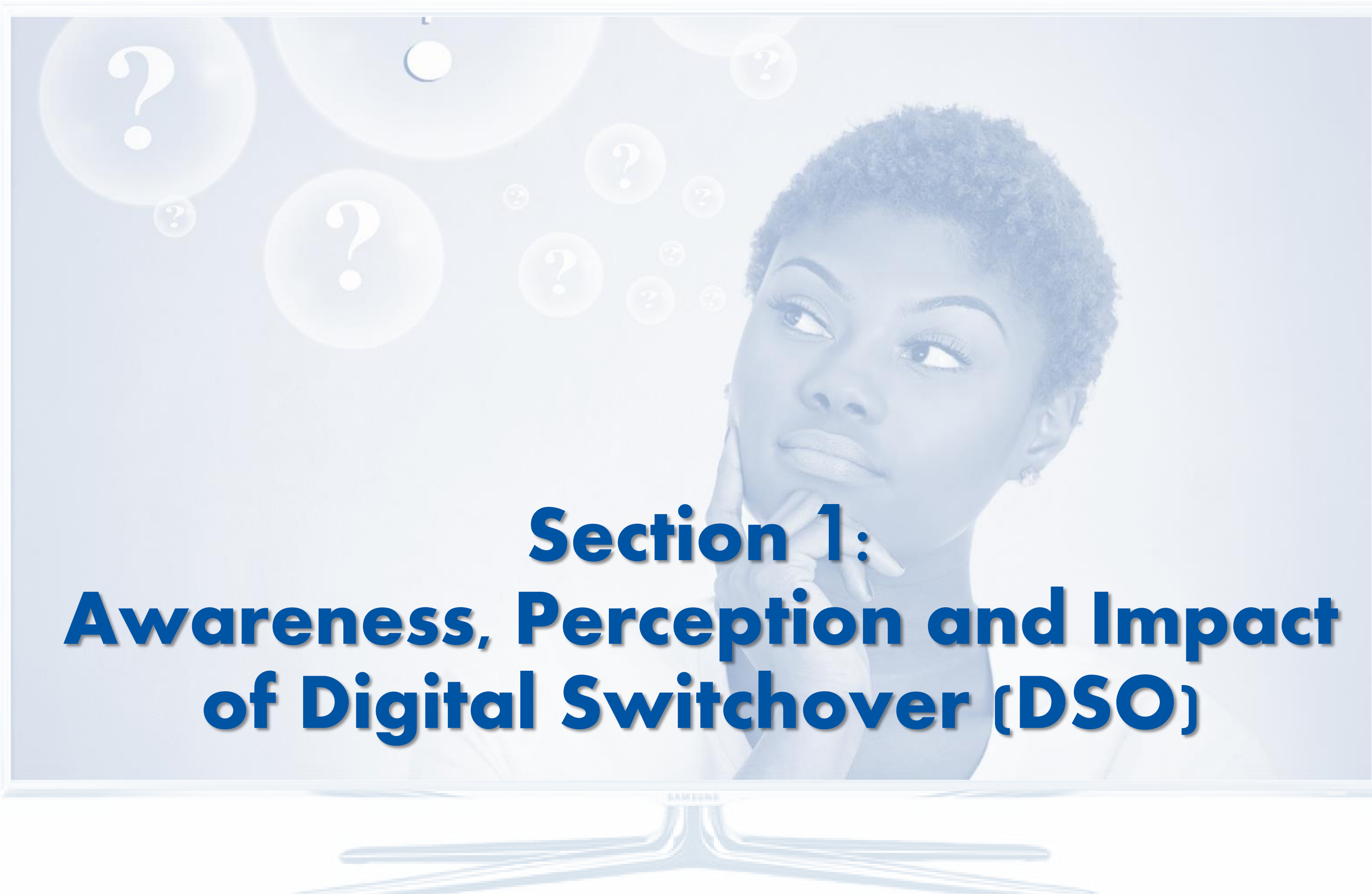
Digital television can provide audio description for the visually impaired, and closed captioning for the hearing impaired. Digital television provides improved picture and sound quality, which can be beneficial to viewers with sensory impairments. Digital television can provide additional features, such as interactive program guides and on-demand programming, which can be beneficial to viewers with disabilities allowing them to navigate the television interface more efficiently.

Rural communities

Rural areas may have limited options for traditional cable, which may have helped make YouTube and streaming platforms a more appealing option, particularly among younger persons. However, digital television would require no monthly subscription fees or costs while offering young people in rural areas a more customizable and cost-effective viewing experience than traditional television options.

Parents

In addition to traditional broadcasting television controls, digital TV would also provide parental controls allowing viewing restrictions appropriate for the age and maturity level of their children. It would also provide interactive programming that allows children to learn in more immersive ways, e.g., some programs may allow children to answer questions, play games, or make choices that affect the outcome of the program.



Section 1:
Awareness, Perception and Impact of Digital Switchover (DSO)

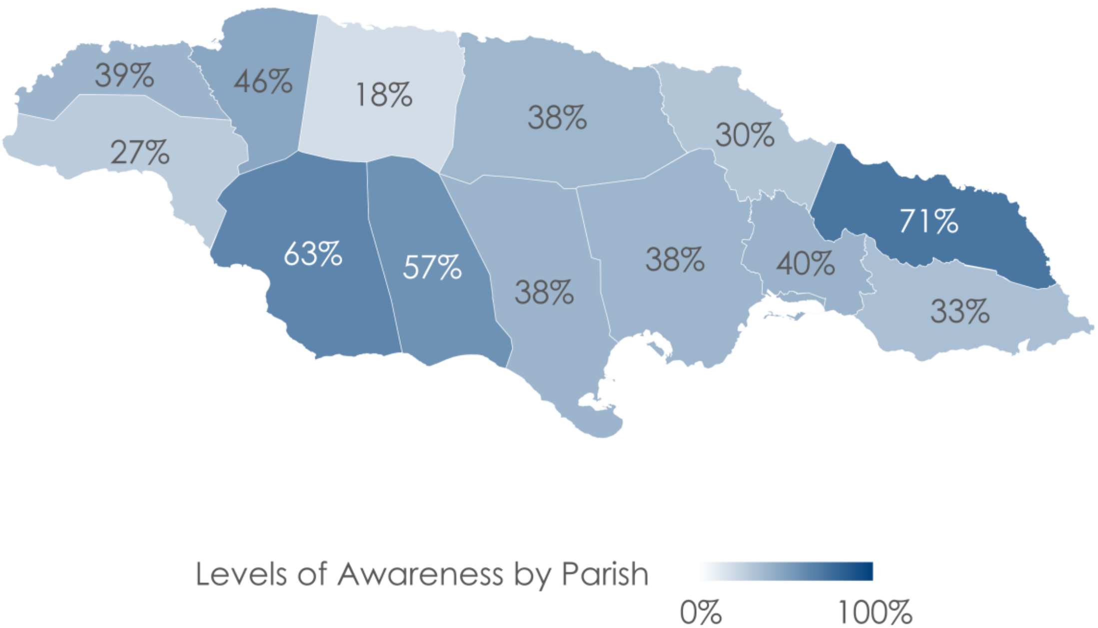
Awareness of DSO

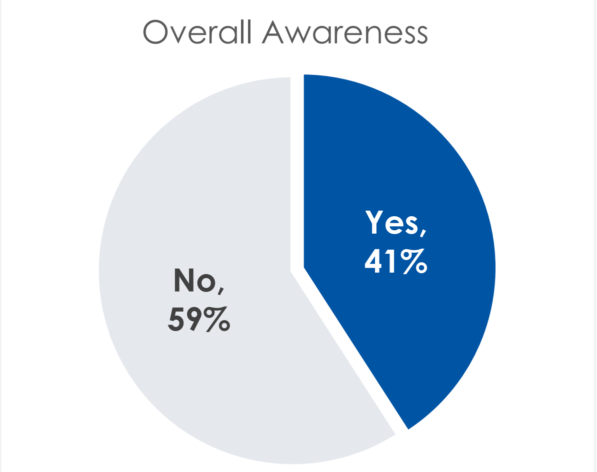
Have you ever heard about 'Digital Switchover?'

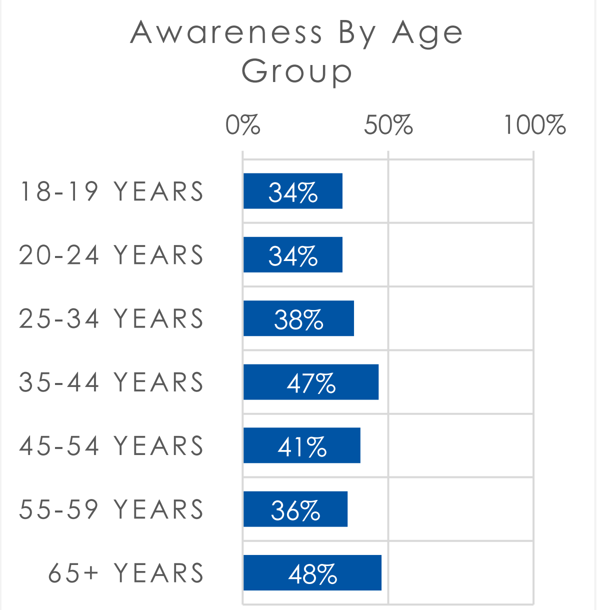
Overall awareness of Digital Switchover was low, with only 41% having heard of the term. Respondents in Portland were most aware of DSO at 71%, followed by St. Elizabeth at 63% and Manchester at 57%. Respondents in St. James recorded the lowest level of awareness among the parishes, at only 18%.

Awareness was lower in younger groups (below 34) with only 35% aware. Awareness was higher among those respondents who were 35 years or older, with 43% having heard the term.

No notable differences existed between male and female respondents.







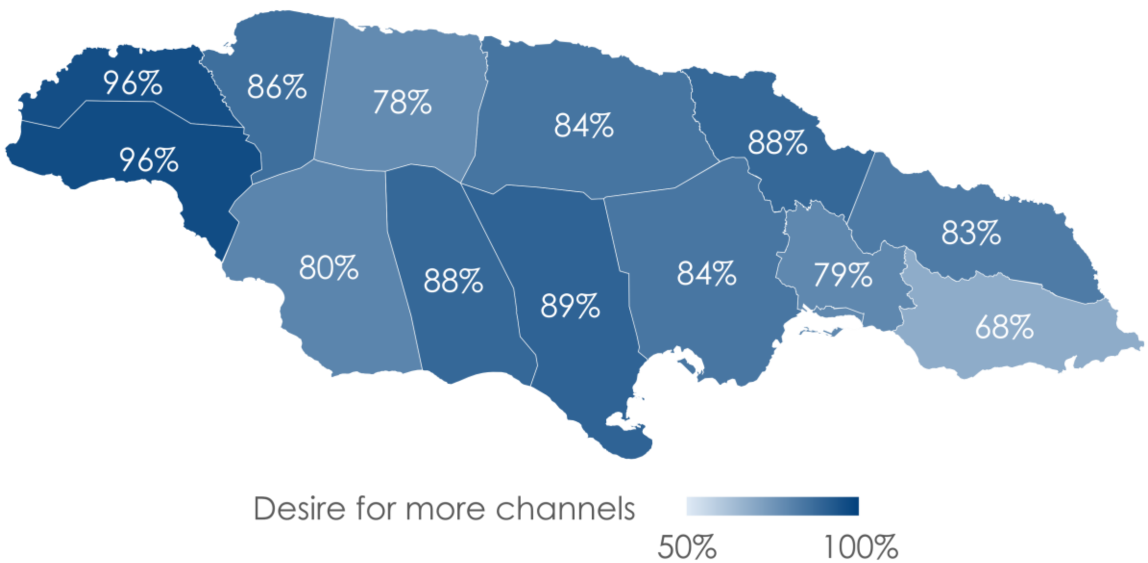
Desire for Additional FTA Channels

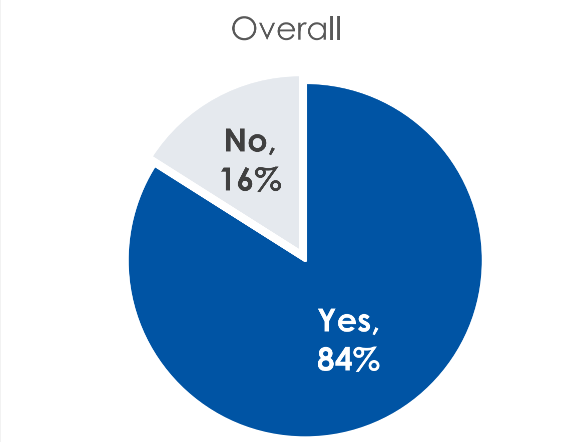
Would you welcome more local television channels?

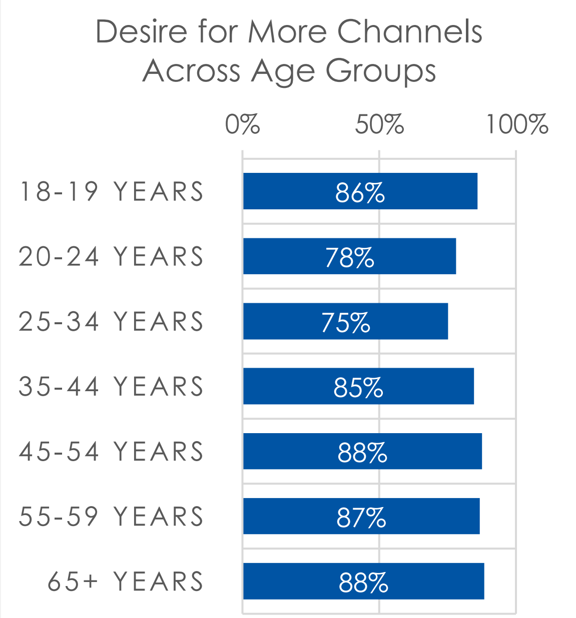
Overall, 84% of respondents would welcome having more local free-to-air television channels. All age groups were receptive to the introduction of new local television channels. However, adults under age 34 were less receptive at 77% on average.

96% of respondents in the parishes of the western parishes of Hanover and Westmoreland are welcoming to more local television channels. This was followed by Clarendon at 89% and St. Mary and Manchester at 88%. St. Thomas respondents were the least receptive to new local television channels, with only 68% responding in the affirmative.

No notable differences existed between male and female respondents.

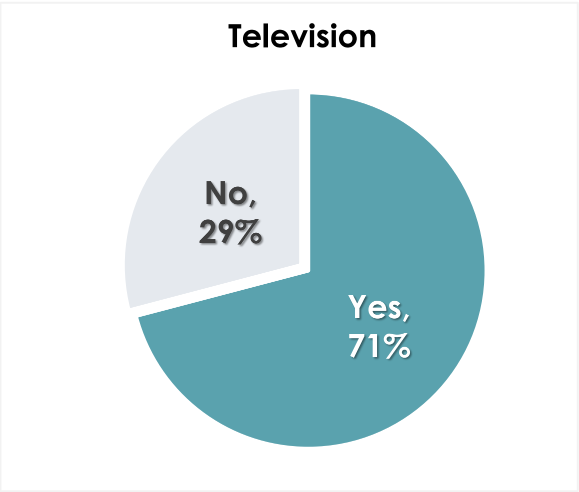




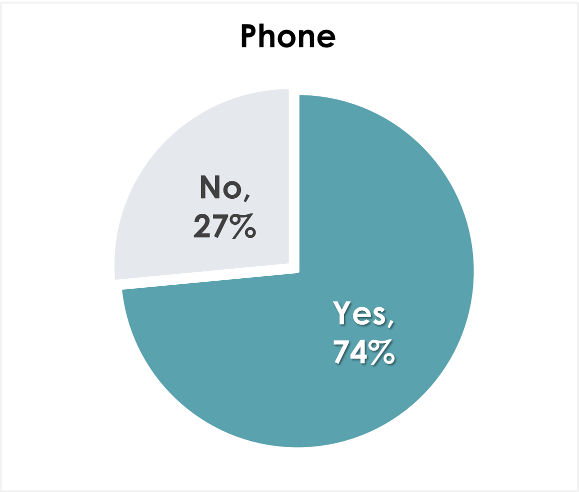


Support for Consumer Technology Upgrades

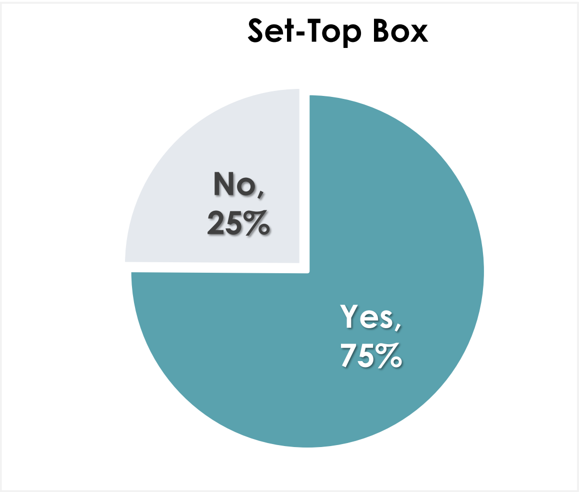
Acceptance and Willingness to Purchase



Would you change your TV set to an ATSC 3.0 digital television to get more free local television stations?



If there were smart phones that could pick up over-the-air television channels without the need for data, would you be interested in purchasing one?



Would you buy an ATSC 3.0 set top box to get more free local television stations?

Approximately three quarters of survey clients expressed interest in changing television sets and purchasing set-top boxes to receive more free local television channels, as well as accessing these channels through smartphones. The consistency in the responses to these channels provide strong support for new channels among the public. 63% and 58% of respondents were **most interested in low-cost items** (as shown on the following page), with a television not surpassing $80,000 and a set-top box not surpassing $5,000. A quarter of individuals were firmly uninterested in purchasing a digital television.

Support for Consumer Technology Upgrades

Acceptance and Willingness to Purchase

If the price meets your budget, how soon would you obtain a device to pick up local channels?	Percentage of Respondents
▪ **I'm ready right now**	**23%**
▪ One to three months	27%
▪ Four to six months	19%
▪ **Six months to one year**	**31%**

While willingness to upgrade devices is high, most persons would need time to prepare for the adjustment.

Only 23% of survey clients would be able to upgrade their devices right away.

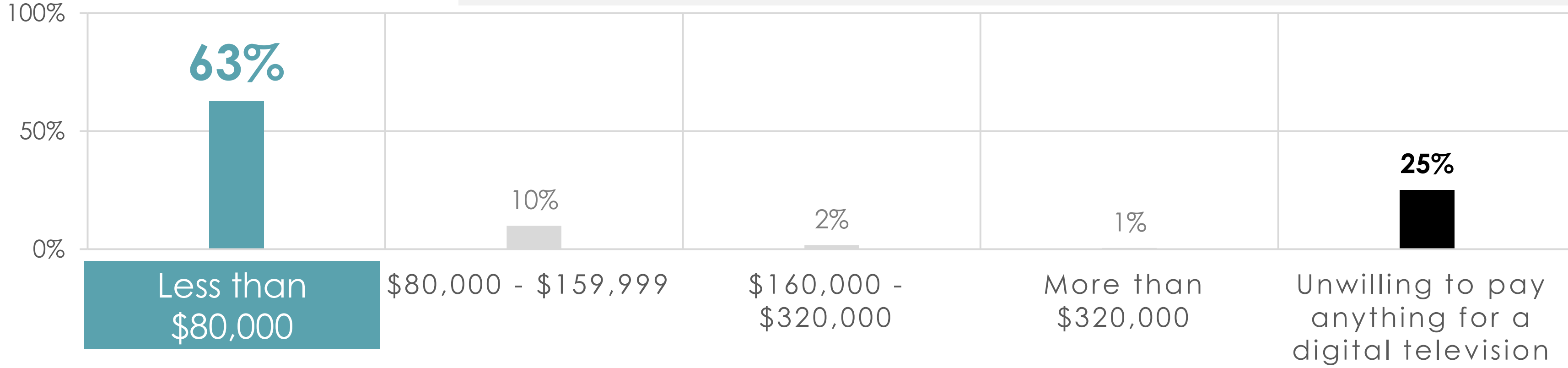
Just over a quarter would need one to three months to prepare, and one half would wait at least four months before purchasing a new device for accessing local channels.

Willingness to Pay

Consumer Technology Upgrades

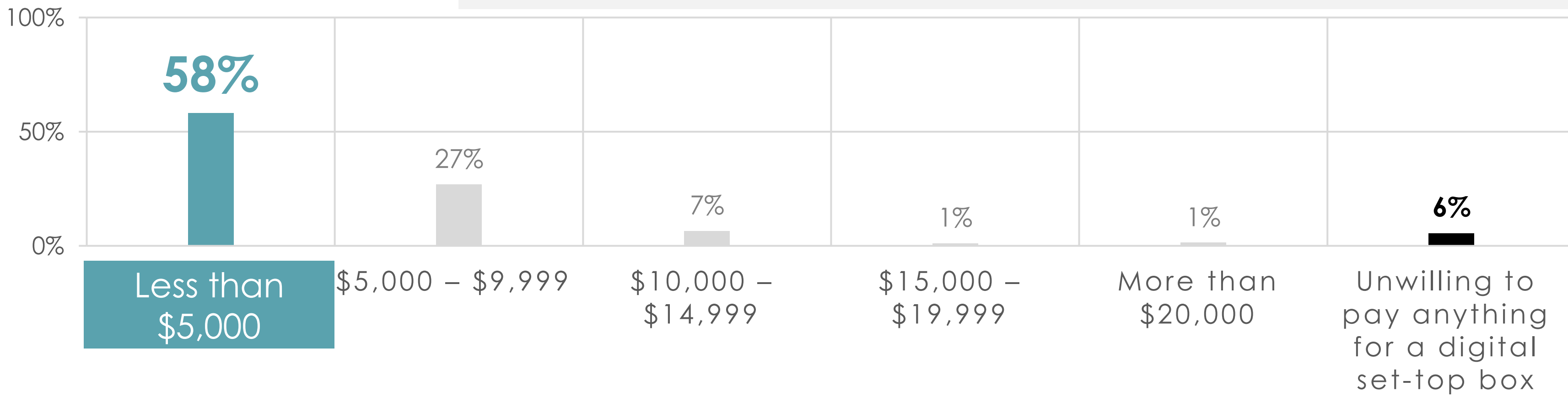
TELEVISION

Most respondents were willing to buy an ATSC 3.0 digital TV if the cost was under $80,000. However, one in every four persons would not buy one at any price point.



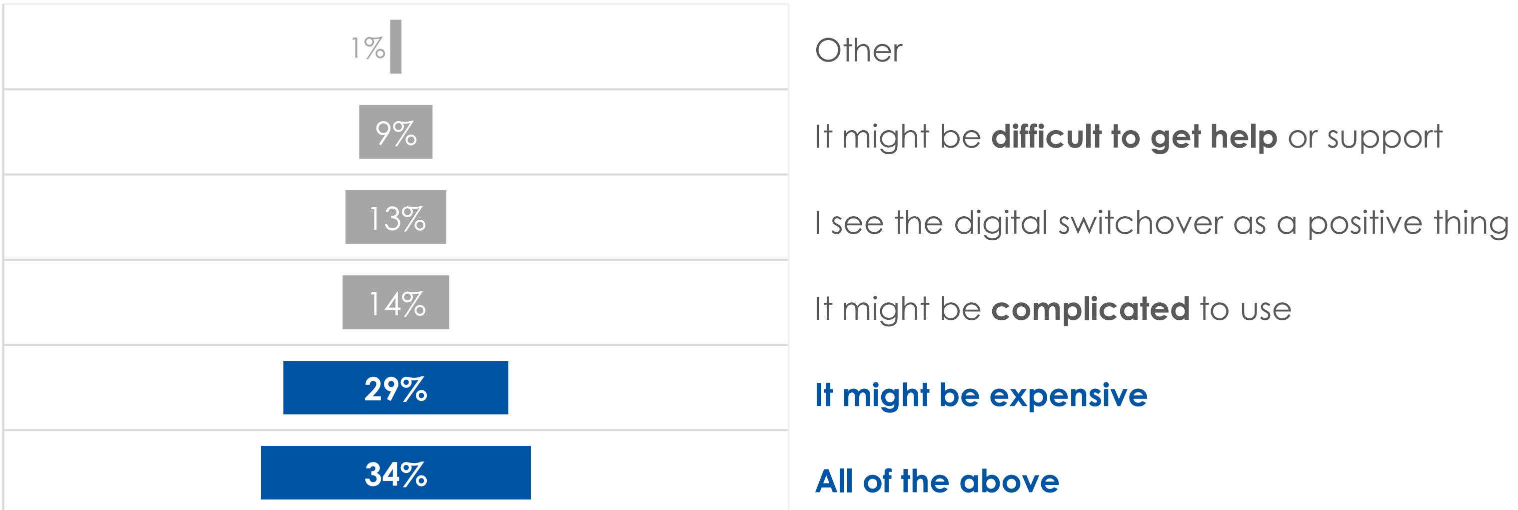
SET-TOP BOX

The majority of respondents were willing to buy an ATSC 3.0 set-top box costing under $5,000. Only 6% were unwilling to buy a new ATSC 3.0 digital set-top box.



Drawbacks of DSO

What might cause you to take a negative view of the digital switchover?



The potential expense of the switchover was the single largest challenge identified (29% of respondents). However, one-third of persons surveyed thought a combination of several factors might hinder their acceptance of the DSO:- high cost, technical difficulties, and lack of technical support. "Other" drawbacks cited centred around hesitancy to adopt new technology and uncertainty about its effectiveness, as shown below.

"Not interested"

"Seems complicated"

"I'm alright with what we have"

"It might not work everywhere"

"Might be ineffective"

"It sounds wireless, and I'm not interested in that option"

"Might give problem later on"

"Might not work"

"I have nothing negative to say"

"What if its not reliable?"

"Will it actually work? Will you get good quality seeing and hearing? Will it pick up anywhere, with nature like a heavy shower of rain easily knock out the feed or signal we should get?"

Most Appealing DSO Benefits

Which benefit(s) of the digital switchover are most appealing to you?	Percentage of respondents*
1. Free to access (no cost)	**62%**
2. More local channels (greater choice and variety)	50%
3. Free access to educational/school content on any smart device in the home without the need for internet connections	48%
• Cutting-edge audio-visual quality	33%
• Decreased need for access to cable channels or streaming platforms	20%
• Emergency and disaster broadcasts to targeted geographical areas	18%
• Targeted local advertisements (e.g., ads specific to people in Montego Bay for a store in Montego Bay)	12%

Free access was the most attractive benefit of the digital switchover, as opined by 62% of respondents. Following this benefit was the ability to access to more channels and free access to educational material without the need for internet connections. These were selected by 50% and 48% of respondents respectively.

The least appealing aspect was the use of targeted local ads with only 12% selecting this option.

*Multiple responses were allowed; totals may exceed 100%.

Factors in DSO Acceptance

What would encourage your acceptance of the Digital Switchover?	Percentage of Respondents*
1. Advertisements or educational sessions on local television	**47%**
2. Ease of access	46%
3. Advertisements or educational sessions on social media	33%
• Reduced cost or subsidy for digital set-top boxes	28%
• Advertisements or educational sessions in local newspapers	23%
• Clear demonstration of the benefits	21%
• Advertisements or educational sessions on the radio	20%
• Recommendation from a friend or family member	18%
• Lack of efficient alternatives	10%
• Targeted emergency and disaster messaging	9%
• Celebrity endorsement	7%

Despite the low proportion of persons stating that targeted ads are an appealing benefit of digital television, 47% believed that ads on local television would be significant factors influencing their acceptance of the DSO. Ease of access to DSO facilities was also important among 46% of clients. Ads on social media were also important for a third of respondents. Emergency messaging and celebrity endorsements were the least encouraging measures.

*Multiple responses were allowed; totals may exceed 100%.

Families

Family composition impacts television viewing choices and platforms. More than half of adults surveyed have children or families. Households with children and teens had high internet access and usage and consumed more YouTube content than local free-to-air television and streaming services.

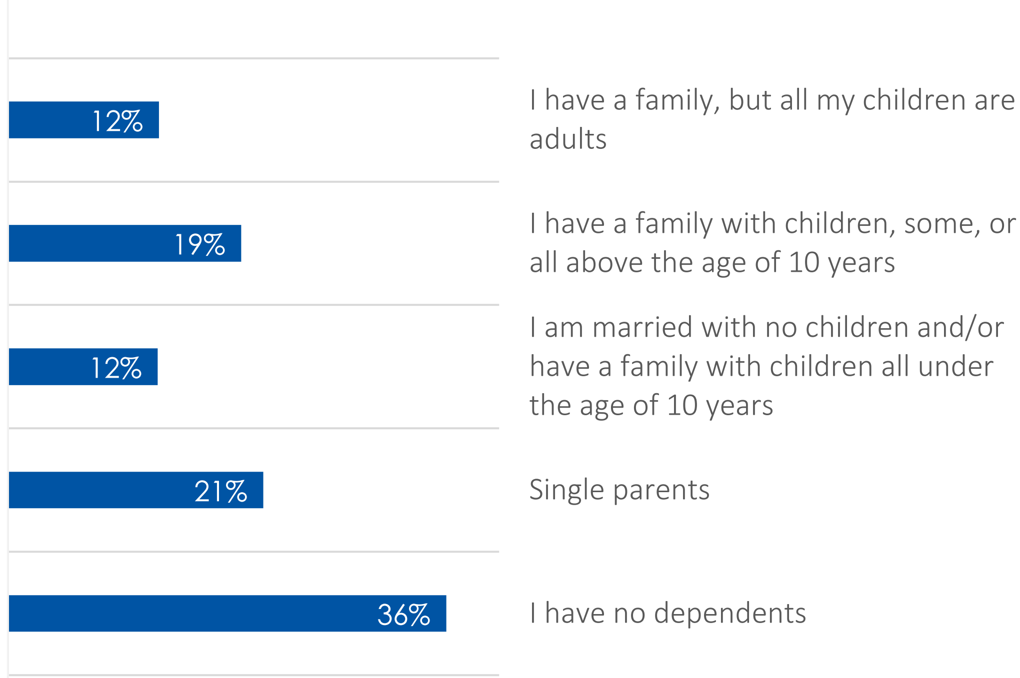
Online content is easily accessible and can be accessed from a variety of devices, making it a convenient source of entertainment and educational content tailored to their children's interests.

Of note, households comprised entirely or mostly of seniors were more likely to fall in the lowest socioeconomic categories and must be flagged as a vulnerable group which may need special interventions and support for the Digital Switchover Process.

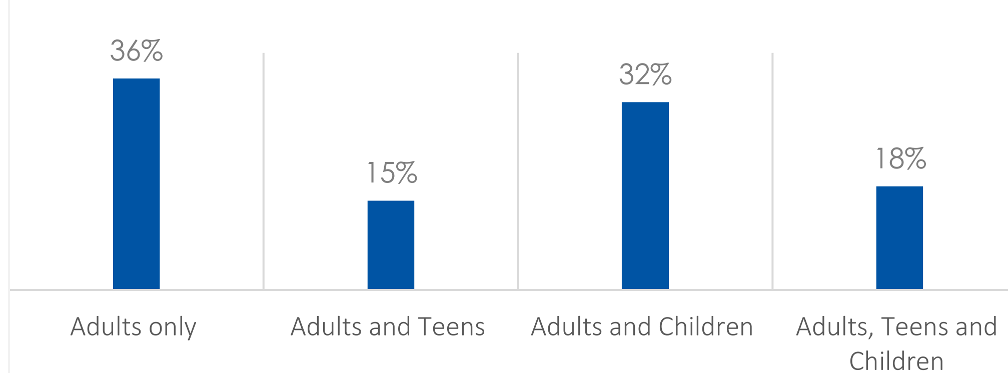
Proportions of Households in Each Group at Lower Socioeconomic Levels

I have no dependents	I have a family	I have a family, but all my children are adults (seniors)
13%	16%	**28%**

Life Stages of Survey Respondents



Family Composition of Survey Respondents



	Adults only	Adults and Teens	Adults and Children	Adults, Teens and Children
DSO Acceptance				
• Awareness of DSO	41%	43%	41%	40%
• Would you welcome more local channels?	80%	82%	**85%**	**92%**
• Would you change your TV set to an ATSC 3.0 digital television to get more free local television stations?	63%	**71%**	**75%**	**78%**
• Would you buy an ATSC 3.0 set top box to get more free local television stations?	70%	**76%**	**77%**	**81%**
Internet and TV Access				
• Internet access (Wi-fi) at home	83%	**88%**	**90%**	**89%**
• Television set within the household	95%	95%	97%	97%
• Analogue TV usage	22%	26%	22%	26%
Accessing FTA Local Channels				
• Outdoor antenna	25%	24%	28%	22%
• Indoor (rabbit ears) antenna	14%	13%	10%	12%
• Cable box	27%	30%	29%	25%
• Via the internet	34%	33%	33%	40%
Appeal of Digital Television				
• Free to access (no cost)	62%	61%	63%	**67%**
• More local channels (greater choice and variety)	48%	51%	52%	52%
• Free access to educational/school content on any smart device in the home without the need for internet connections	42%	**50%**	**53%**	**52%**
Television Content Viewership				
• I watch local television shows and programmes regularly	**39%**	29%	29%	**34%**
• I actively engage with social media like YouTube and/or watch programmes online regularly	38%	**39%**	**40%**	**38%**
• I watch streaming services like Netflix regularly	23%	32%	31%	29%

Vulnerable groups

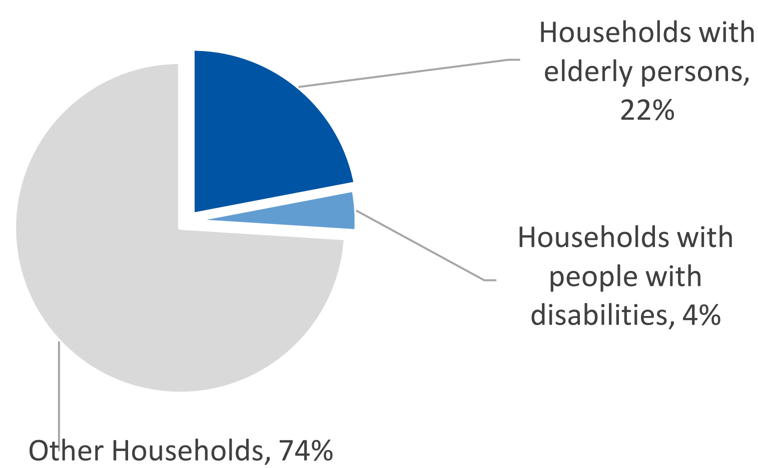
Households with elderly persons comprised 22% of households represented by survey respondents; 4% had people with disabilities.

Both groups had relatively high levels of engagement with free-to-air local channels (compared to other respondents), and would welcome the opportunity to access more FTA local channels in future. However, these groups were also more price sensitive. Households with people with disabilities in particular were more likely to belong in lower socioeconomic levels overall, with those is rural areas particularly vulnerable. While television penetration was almost ubiquitous, both groups had slightly lower levels of internet penetration and higher rates of usage of analogue television compared to 'Other' households (see next page).

The potential expense of the switchover was flagged by households with persons with disabilities as a challenge, with 33% fearing it might be too expensive. Nonetheless, willingness to pay for set top boxes was also higher among households with elderly or disabled persons than other households. While only 25% of 'Other' households were willing to spend between $5,000 to $10,000 for a set-top box, 31% of households with people with disabilities, and 35% of households with elderly persons were willing to do so.

The proportion of people who were unwilling to spend any money on a digital set-top box was similar across the three categories. However, households with disabled persons were less likely to say that they are unwilling to pay for a digital television (only 18% compared to 25% of the average respondents).

Composition by Households Surveyed



Proportions of Households in Each Group at Lower Socioeconomic Levels (by Location)

Location	Households with People with Disabilities	Other Households
City/Capital	5%	4%
Other urban	5%	3%
Rural	**13%**	9%
Total	**22%**	**16%**

	Households with elderly persons	Households with persons with disabilities	Other Households
DSO Acceptance			
• Awareness of DSO	42%	**57%**	40%
• Would you welcome more local channels?	**88%**	**84%**	83%
• Would you change your TV set to an ATSC 3.0 digital television to get more free local television stations?	73%	82%	69%
• Would you buy an ATSC 3.0 set top box to get more free local television stations?	78%	78%	74%
Internet and TV Access			
• Internet access (Wi-fi) at home	83%	78%	89%
• Television set within the household	95%	96%	96%
• Analogue TV usage	**34%**	**34%**	20%
Accessing FTA Local Channels			
• Outdoor antenna	28%	25%	25%
• Indoor (rabbit ears) antenna	12%	**24%**	12%
• Cable box	**31%**	18%	27%
• Via the internet	29%	**34%**	**36%**
Appeal of Digital Television			
• Free to access (no cost)	**67%**	**72%**	61%
• More local channels (greater choice and variety)	**54%**	**58%**	49%
• Free access to educational/school content on any smart device in the home without the need for internet connections	50%	51%	48%
• Decreased need for access to cable channels or streaming platforms	**24%**	**31%**	18%
Television Content Viewership			
• I watch local television shows and programmes regularly	**47%**	**42%**	29%
• I actively engage with social media like YouTube and/or watch programmes online regularly	31%	31%	**42%**
• I watch streaming services like Netflix regularly	23%	27%	29%

Section 2: Technology and Devices

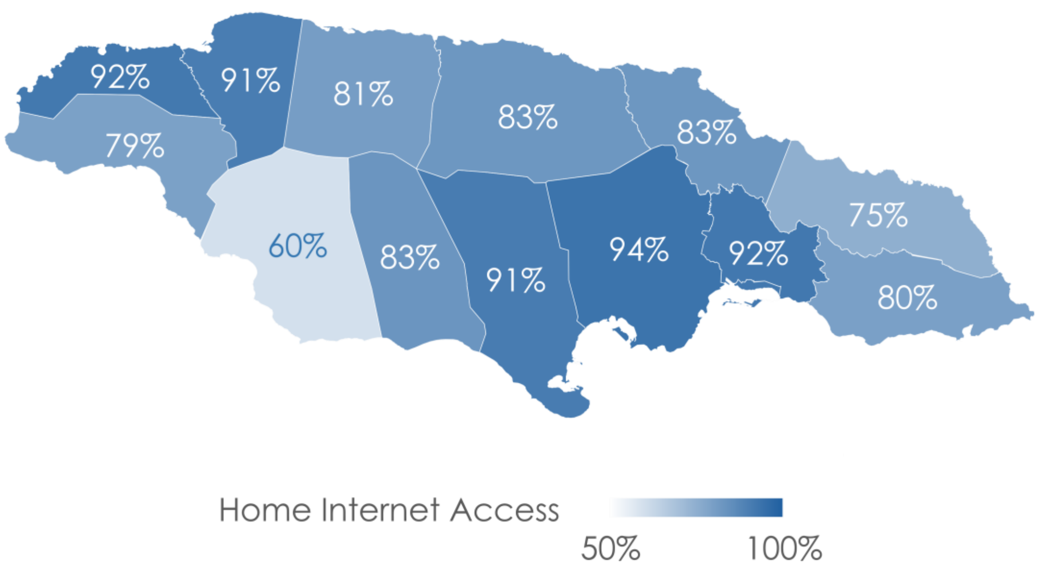
Access to the Internet

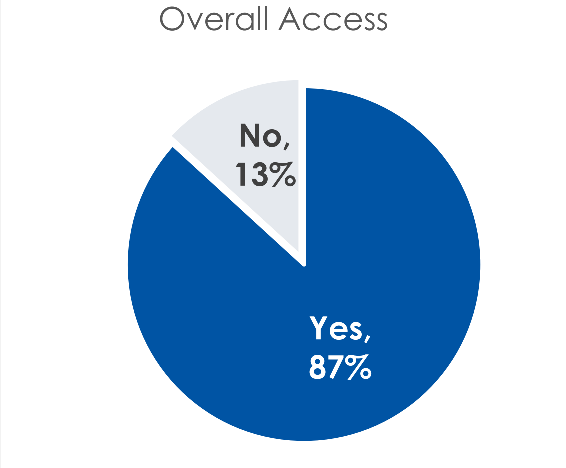
Do you have internet access/Wi-Fi at home?

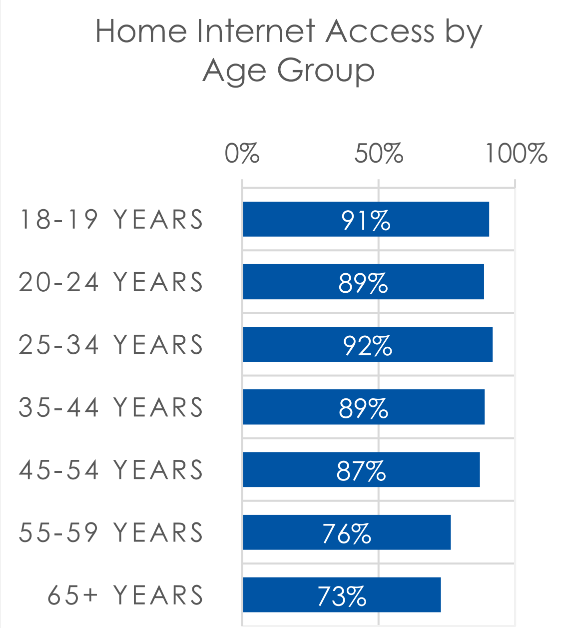
Household internet access was widespread, with 87% responding in the affirmative.

This was greatest among the youth, 34 years and under (91%) and lowest among those over 54 years of age (75%). Access was highest in the parishes of St. Catherine (94%), Hanover (92%) and Kingston and St. Andrew (91%). St. Elizabeth had the lowest coverage, with only 60% having internet at home. This was followed by Portland with coverage among 75% of respondents.

No notable differences existed between male and female respondents.







Access to the Internet

How else do you or other members of your household **access the internet?***

Mobile data plan on my phone regularly/ most of the time	**61%**
Mobile data plan on my phone occasionally/from time to time	31%
Neighbour's Wi-fi	23%
Other source	11%
At work or school	9%
Community centre, coffee shop or other community wi-fi	7%

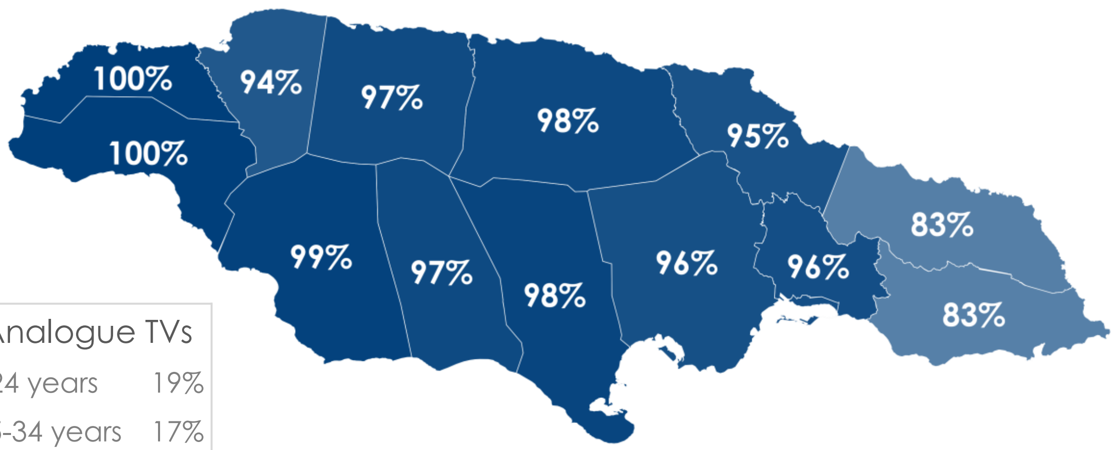
Respondents without internet access at home gain access primarily through mobile data frequently (61%) or occasionally (31%). Community sharing is an important factor among 23% who share internet access with neighbours and 7% who utilize community Wi-Fi.

*Multiple responses were allowed; totals may exceed 100%.

Television Ownership/Access

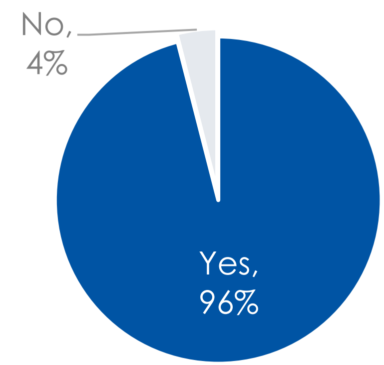
Do you have a television set within the household?

A staggering 96% of respondents possessed a television set within their households. These were largely digital, with 95% owning at least one digital television. There were no notable differences in ownership of a television set by gender or age. However, older persons were more likely to own analogue televisions (34% on average for those over 55 years old, compared with 18% for those under 44 years old).



Analogue TVs	
≤24 years	19%
25-34 years	17%
35-44 years	18%
45-54 years	29%
55-59 years	34%
65+ years	33%

Overall Household Television Access



Television Access by Location Type

Parish Capital/ City/ Major Urban areas	95.3%
Small town/ Other Urban areas	95.1%
Rural areas	**97.1%**

FTA Local Channel Viewing

How do you and other members of your household **access** local free-to-air tv channels?	Percentage of Respondents
Via the internet	**34%**
Cable box	28%
Outdoor antenna	26%
Indoor (rabbit ears) antenna	12%

How do you **watch** local free-to-air television programmes?	Percentage of Respondents*
I watch on my television at home	**83%**
I stream television channels on my tablet or smartphone	26%
I watch programmes on a streaming platform or website	14%
I stream television channels on my computer or laptop	13%
I watch programmes on a streaming application	9%
I don't watch local free-to-air television	6%

Free-to-air channels are accessed via the internet in these televisions (34%), followed by through a cable box (28%) and outdoor antenna (26%). Indoor antennae (rabbit ears) were the least popular means to access local television channels, only in use in the homes of 12% of respondents. The mechanism used to access local free-to-air television varies widely across parishes. 83% of respondents watch local television, at home while only 26% stream television channels on a smart device.

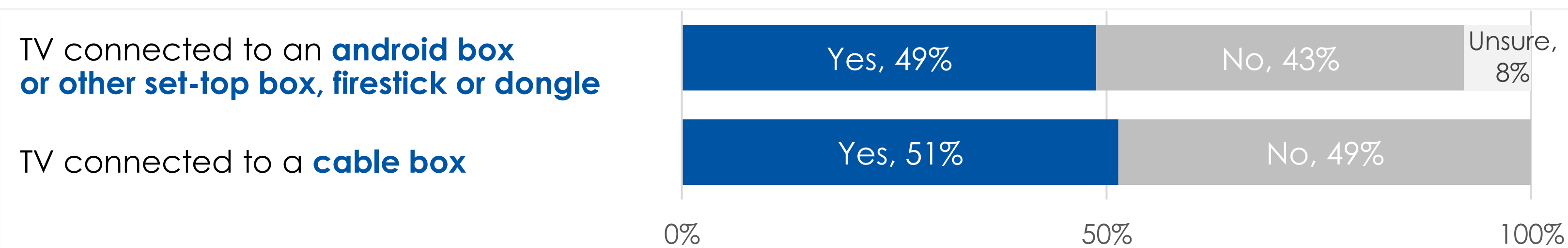
*Multiple responses were allowed; totals may exceed 100%.

Analogue TVs v. Digital TVs

Number of Analogue Television Sets per Household	Percentage of respondents
None	**75.6%**
One	16.5%
Two	4.3%
Three	1.5%
Four	0.7%
Five	0.4%
More than 5	0.4%
I'm not sure	0.6%

Number of Digital Television Sets per Household	Percentage of respondents
None	5.0%
One	**42.0%**
Two	**32.5%**
Three	13.0%
Four	4.6%
Five	1.9%
More than 5	0.8%
I'm not sure	0.3%

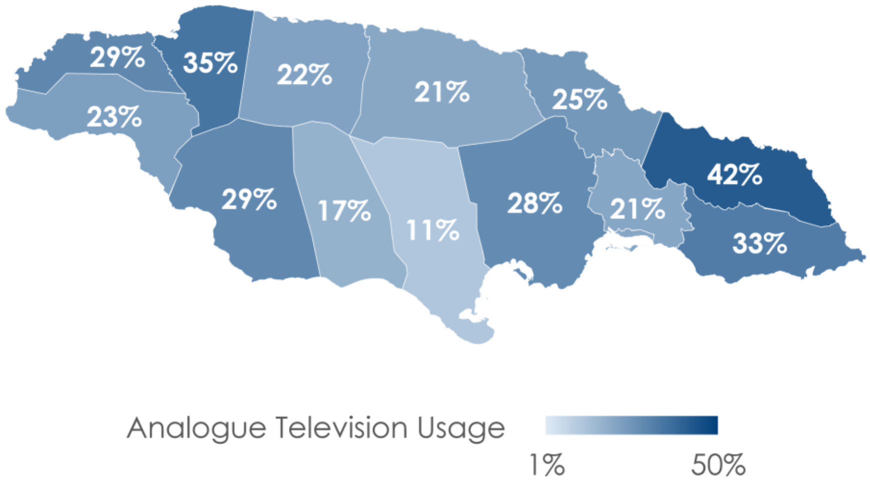
Attachments



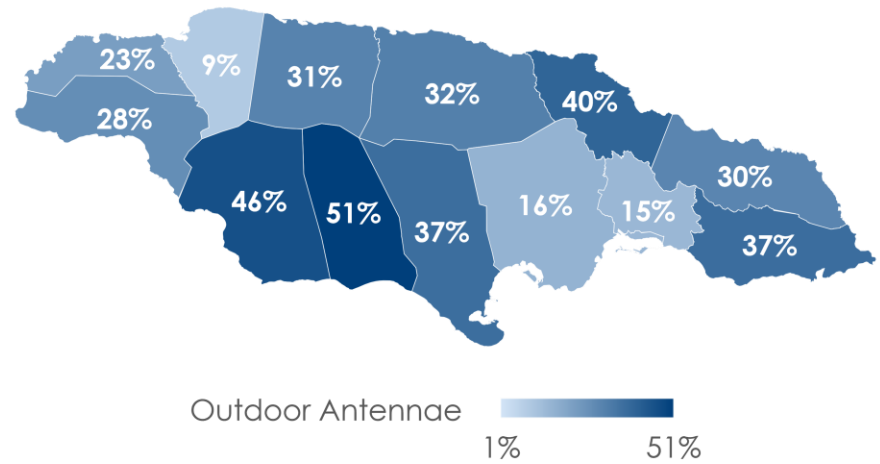
Roughly four in every ten households with digital televisions had only one unit, while one third had two units. Only 5% owned no digital television. Overall, 76% of respondents did not own an analogue television. 17% of households hosted a single analogue television, with only 2% hosting more than three units. Ownership of analogue televisions varies widely across parishes as shown on the following page.

One half of respondents had cable subscription and/or android boxes or other digital set top boxes or attachments allowing access to the internet.

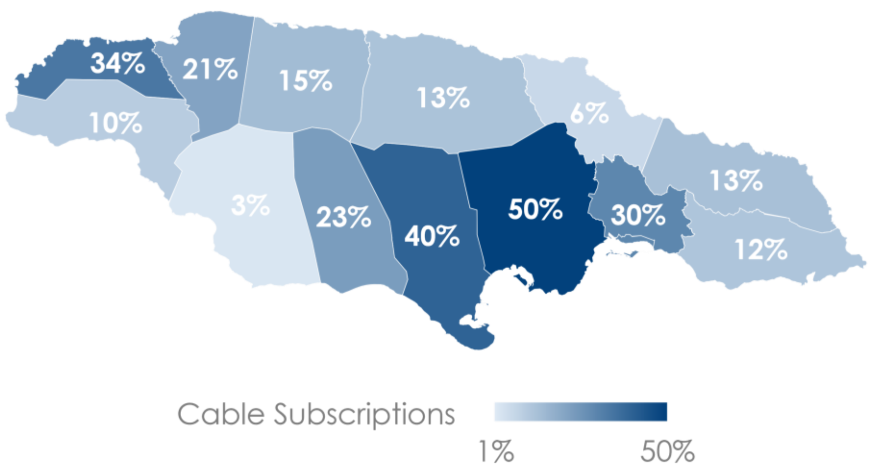
Analogue Television Usage by Parish



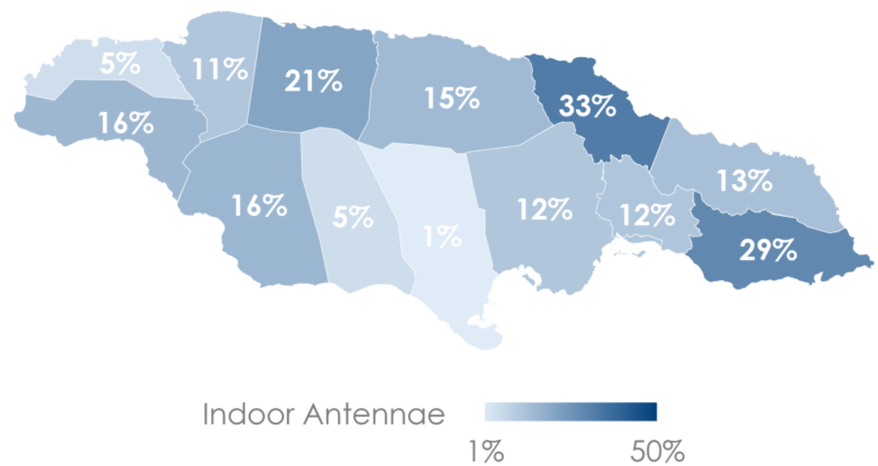
Usage of Outdoor Antennae to Access FTA Local Channels by Parish



Usage of Cable Box to Access FTA Local Channels by Parish



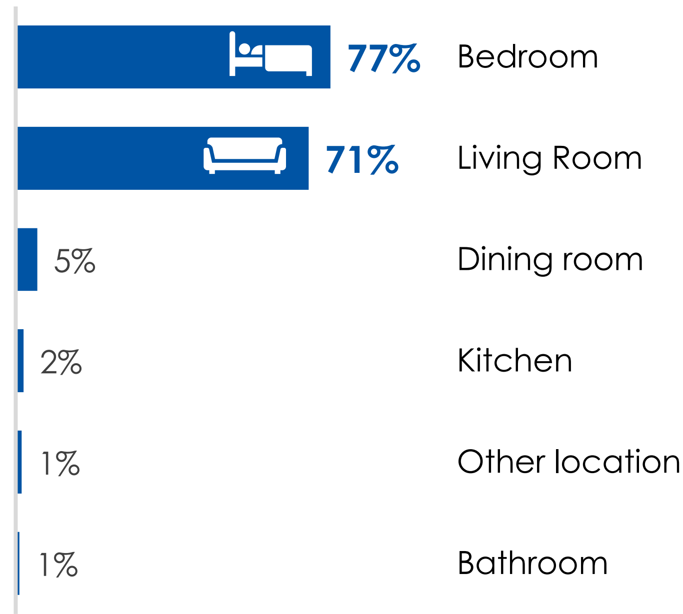
Usage of Indoor Antennae to Access FTA Local Channels by Parish



Television Make and Usage

What is the make of your television set(s)?	Percentage of respondents*
1. Samsung	**30.2%**
2. LG	**23.0%**
3. TCL	**13.9%**
• Panasonic	10.7%
• Sharp	8.4%
• "I'm not sure"	7.6%
• Sony	7.4%
• JVC	7.3%
• Mastertech	7.0%
• Toshiba	4.9%
• Philips	3.9%
• HiSense	1.8%
• Vizio	0.9%
• Iffalcon	0.4%
• Zenith	0.3%
• Vizzion	0.1%
• **Other Brand(s)**	**17.1%**

In which rooms are television sets located?*



Samsung (30%) and LG (23%) were the most popular makes of television owned by respondents. These were followed by brands such as TCL (14%), Panasonic (11%) and Sharp (8%). The least popular makes were Vizio, Iffalcon, Zenith and Vizzion, each representing less than 1% of the makes of television sets. Bedrooms and living rooms were the typical locations for television within the home.

*Multiple responses were allowed; totals may exceed 100%.

Television Renewal

Most Recent Television Purchase	
Within the past year	18%
One to three years ago	**37%**
Four to six years ago	**29%**
Seven to nine years ago	10%
Ten or more years ago	6%

Frequency of Television Purchases	
Every one to three years	5%
Every four to six years	5%
Every seven to nine years	6%
Every decade or more	5%
Regularly, in keeping with trends and upgrades in technology	4%
Only when necessary: when repairs are no longer possible or too costly	**75%**

Renewal rates were fairly low, with three quarters of all respondents saying that they only replaced their televisions when they were unusable or when repair costs were prohibitive. The plurality reported making their most recent television purchases between one and three years ago.

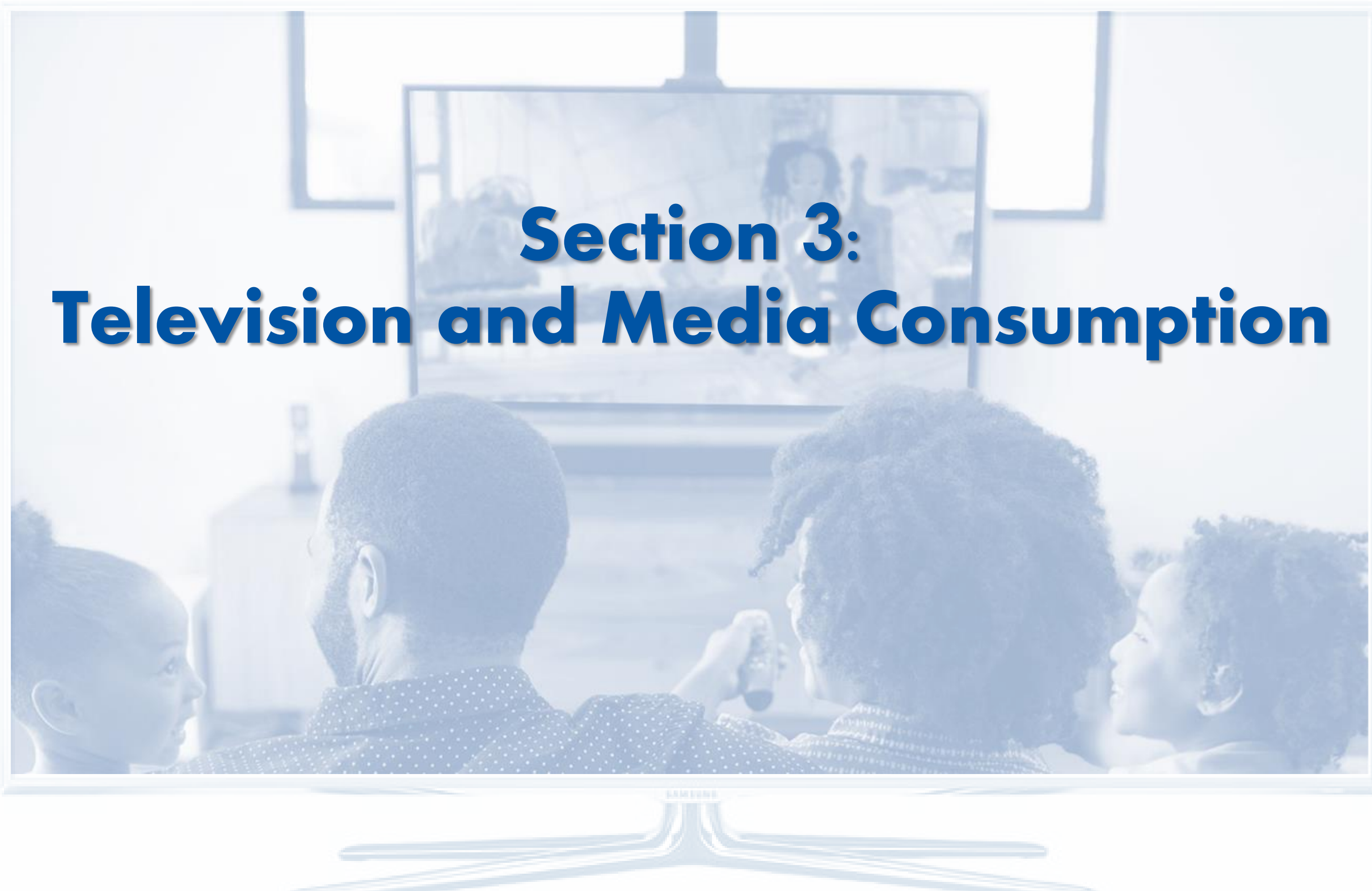
Factors in Television Selection

	Average Score (out of 10)	Top-2 Box Score (percentage of respondents who gave the factor a score of 9 (very important) or 10 (essential))
1. Warranty	**8.6**	**68%**
2. Audio-visual quality specifications	**8.5**	**64%**
• Affordability/Price	8.4	62%
• Product Reliability	8.5	60%
• Ease of use	8.4	60%
• Maintenance	8.2	57%
• Ability to access different streaming platforms	8.1	57%
• Store reliability	8.0	52%
• Special Deals	7.7	45%
• Size	7.5	42%
• Brand name	7.1	37%

Overall, all of the factors cited were considered fairly important by respondents, with the lowest scoring factor, brand name, nonetheless receiving a score of 7 out of 10 for importance. Warranty, audiovisual specifications, price, reliability and ease of use were considered very important or essential by 60% or more of those surveyed.

Q. How important are each of the following factors in influencing selection and purchase of a television?
Use a scale of 0 to 10, where 0 means not at all important, and 10 means essential.

Section 3:
Television and Media Consumption

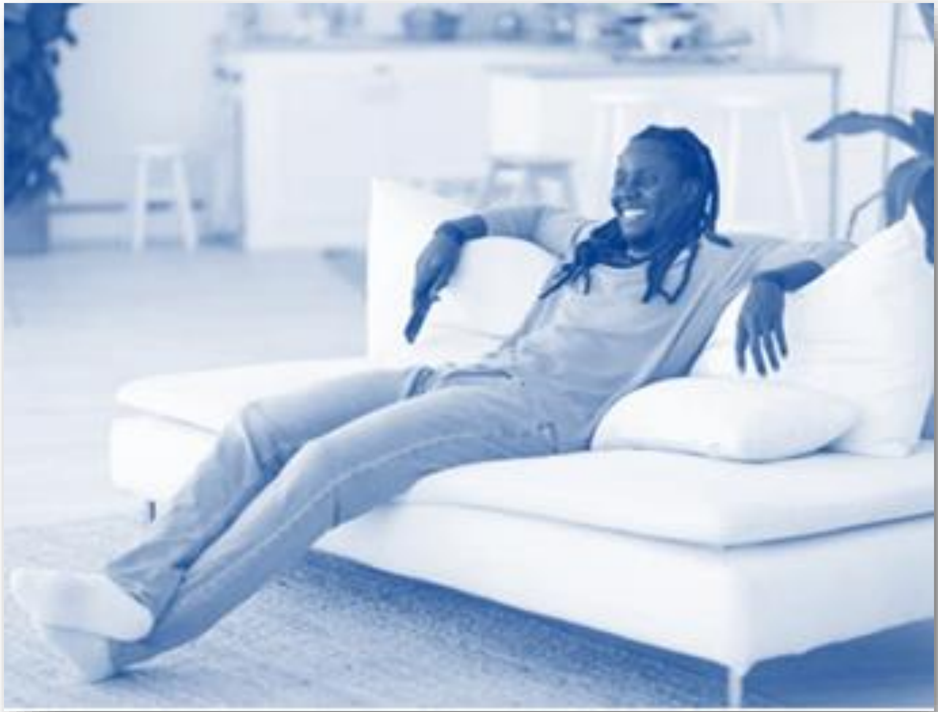


Television Viewing

61% of respondents watch local television, while only 37% watch cable television. Closely behind local television is the use of streaming sites such as Netflix, HBOMax and Disney Plus at 56%.

Respondents were most engaged on the television units, with 87% reporting it as the most common device for watching television. The smartphone followed afterwards, with 48% of clients watching television through their cell phones. Computers and tablets were the least popular devices for watching television, used by only 17% and 16% of respondents, respectively.

Nearly all (97%) respondents watch television at their home. A fifth watch television at their friends' homes and 12% watch during their commute to and from work. Only 10% watch television in public at places such as bars and restaurants.



Television viewing is predominantly a solitary exercise, with most relating that they watch their preferred programming in their own bedrooms or living rooms.

How do local viewers watch television?

Platforms?*

I watch local television channels	**61%**
I watch streaming sites (like Netflix)	**56%**
I watch cable television channels	37%

Devices?*

On my tv	**87%**
On my smartphone	**49%**
On my computer	17%
On my tablet	16%

Locations?*

At home	**97%**
At the homes of friends	20%
In car/bus (during commute)	12%
In public (bars/restaurants/etc.)	10%
Other location(s)	3%

With whom?

Alone	**53%**
With Family	28%
With Spouse/Partner	11%
With Friends	8%

*Multiple responses were allowed; totals may exceed 100%.

Most Frequent Platform Usage

The plurality of respondents (38%) reported that they primarily engage in social media and/or watch programmes online regularly while one third (33%) watched local television shows most often. Just beyond a quarter of respondents (28%) utilized streaming services on a regular basis, with only 1% uninterested in television or streaming media.

Q. Which statement best describes you? 2,267 respondents
*Persons who were not interested in television or streaming did not complete the rest of the survey.

Reported Viewership

Local free-to-air television channels

TVJ	**83.9%**
CVM	**52.9%**
None	10.3%
Love TV	7.5%
Other	2.7%

Local cable television channels

None	**53.4%**
SportsMax	**23.2%**
Hype TV	15.2%
Reggae TV	12.0%
Jamaica Education TV	9.2%
Other	7.4%

Foreign cable television channels

None	**29.5%**
Lifetime	**29.3%**
BET	**28.7%**
HBO/Cinemax	**20.5%**
Disney	**20.0%**
Discovery	19.2%
ABC	18.7%
USA	17.5%
Fox Movies	15.1%
TNT/TBS	14.2%
Nickelodeon	14.1%
MTV	14.0%
ESPN	13.5%
Hallmark	12.7%
NBC	12.5%
Fox News	11.7%
Food Network	11.0%
TLC	10.4%
OWN (Oprah Winfrey Network)	10.3%
Other	9.5%
Comedy Central	9.0%
History	8.5%
Home and Garden (HGTV)	5.4%
MSNBC	3.6%

Q. Which channels do you watch?
*Multiple responses were allowed; totals may exceed 100%.

Reported Viewership

Local streaming platforms

None	**63.7%**
One Spot Media	**35.0%**
Sage Network (Sagicor)	2.6%
Others cited: Live streams of local media providers on their websites or YouTube (CVM, CVM Plus, JIS, Loop Jamaica, RJR, SportsMax)	0.5%

Foreign streaming platforms

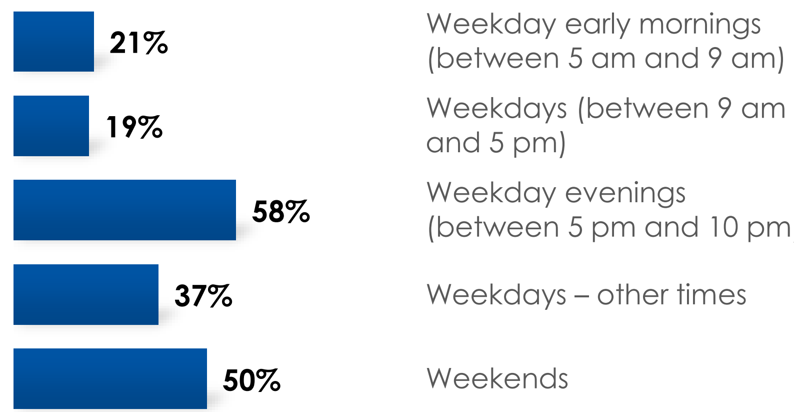
YouTube	**64.0%**
Netflix	**63.4%**
HBO Max	15.9%
None	12.5%
Disney Plus	11.0%
Starz	10.8%
Hulu	8.8%
(Amazon) Prime Video	6.9%
ESPN Plus	6.0%
Other	5.1%
Apple TV Plus	3.6%
Paramount Plus	3.1%
C Sports	0.1%

Q. Which platforms do you watch?
*Multiple responses were allowed; totals may exceed 100%.

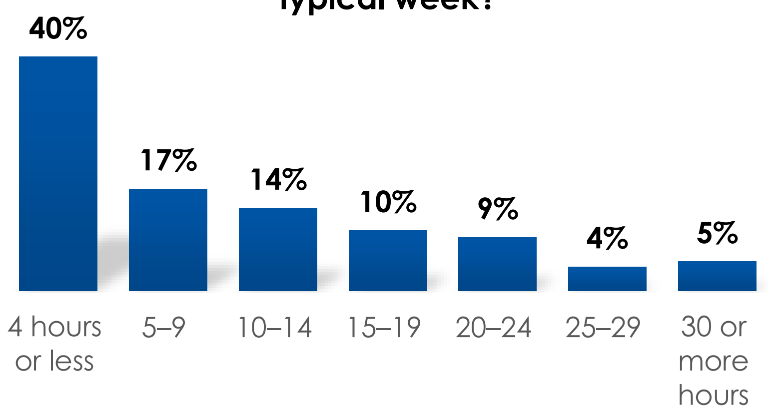
Watch Times and Frequency

How frequently do people watch television shows or programmes

When do people typically watch television?



Hours spent watching television content within a typical week?



Most persons interviewed revealed that they watch television content daily (52%).

Weekday evenings between 5 pm and 10 pm were the most common times cited for watching television, followed by weekends.

The plurality of survey respondents reported that they watch 4 hours or less of television programming each week.

Drivers of Television/Media Consumption

What are your reasons for watching television?	Percentage of respondents*
• **Entertainment**	**66%**
• **News and Information**	**63%**
• Relaxation	50%
• Learn new things	35%
• Something to do with friends/family/connect with loved ones	22%
• Other	2%

What influences how frequently you use your television, smartphone or other device to view shows/programming?	Percentage of respondents*
Amount of free time I have	**63%**
Internet access / Signal or reception	58%
My mood/ How I feel	55%
Content type	29%
Other: "Company from friends and /or family members" / "Clients in the salon" "Daily routine" / "My work schedule" "My TV is always on"	0.4%

*Multiple responses were allowed; totals may exceed 100%.

Usage and Engagement

How has your usage changed in the past year?	Free-to-air Local Television	Streaming Platforms
My engagement has not changed	57.2%	52.8%
My engagement has increased	21.2%	37.3%
My engagement has decreased	21.7%	9.9%
Net increase in engagement	**↓ 0.5%**	**↑ 27.4%**

While most viewers surveyed reported no change in their engagement across television media platforms, more than one quarter reported watching streaming platforms more over the past year.

Only a marginal decline was reported for local free-to-air channels.

Those who don't stream cited that they were "not in touch with technology like that", "I watch only what is on my television. I don't bother the young people with what they watch" or were satisfied with the local offerings "I like that everything comes on at a specific time."

A few opined that while they still did not use streaming platforms, they were nonetheless dissatisfied with accessibility/reception of local channels, for example, "I can only watch TVJ. CVM stop working long time", or "Service isn't that great."

*Multiple responses were allowed; totals may exceed 100%.

Engagement

What do you like about your streaming service(s)?*

☑	Affordability	58%
☑	Video and audio quality	56%
☑	Smooth streaming	55%
☑	Variety of shows available	53%
☑	Lack of advertisements	28%
☑	Other: "Can pause and rewind when needed" "The ability to stream from anywhere, anytime"	4%

When asked what features they liked about their streaming platforms, affordability, audio-visual quality, and choice/variety of content all trumped the lack of advertisements.

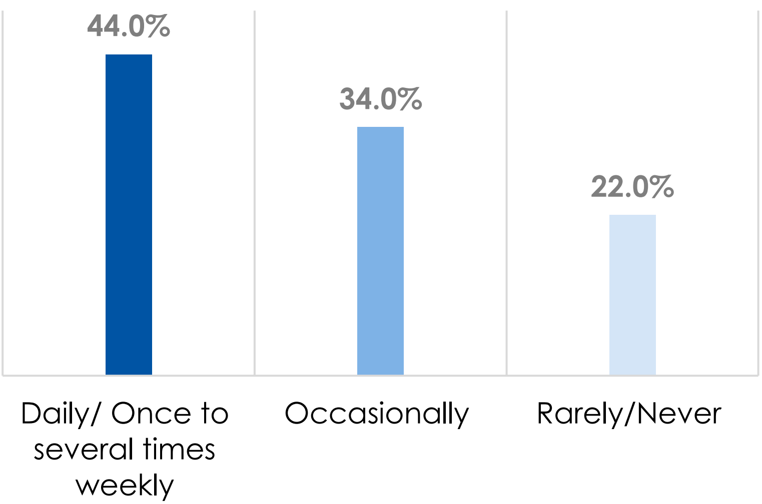
Television serials with a duration of 40 minutes to an hour were the preferred video content.

Discussion and engagement was fairly high with just under half of respondents saying they discussed television programmes once to several times per week.

What length of video content is ideal?

Long series: 40 – 60 minutes	**35%**
Short series: 20 - 30 minutes	30%
Movies (one and half hours or more)	28%
Clips: 1 minute or less	7%

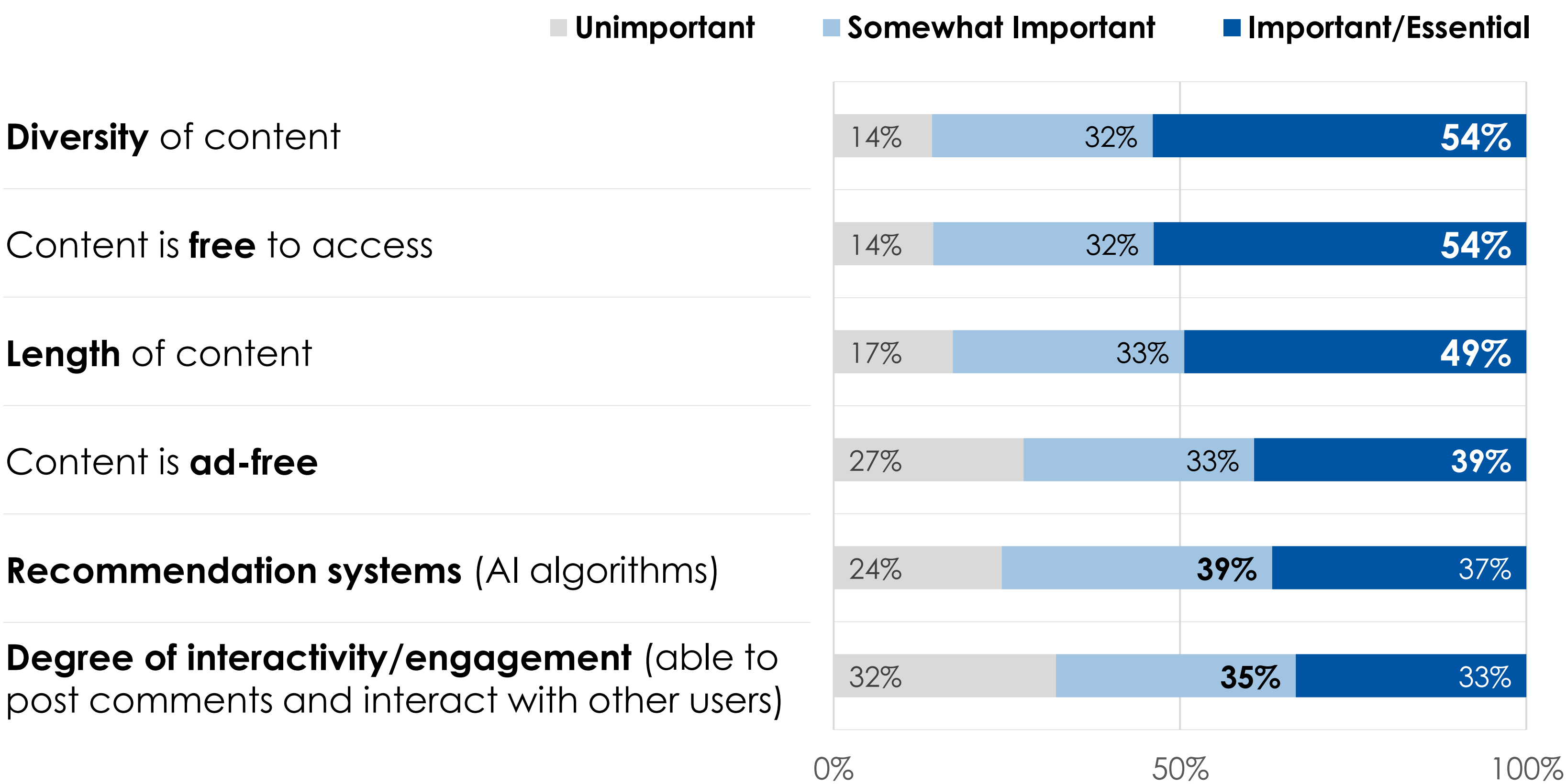
How often do you discuss television shows or programmes with friends or family?



*Multiple responses were allowed; totals may exceed 100%.

Key Engagement Factors

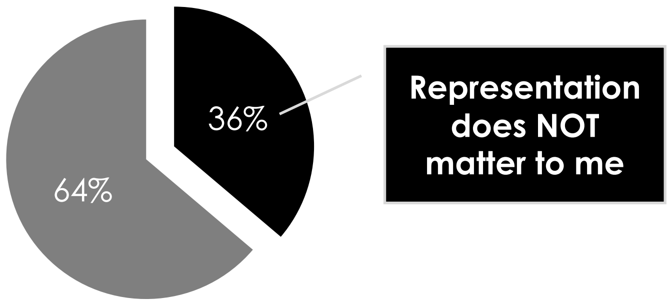
How important are the following?



‘Diversity of content’ and ‘Free to access’ were the most important factors, with 54% of persons interviewed saying these were essential to their continued engagement on a television viewing platform.

Representation

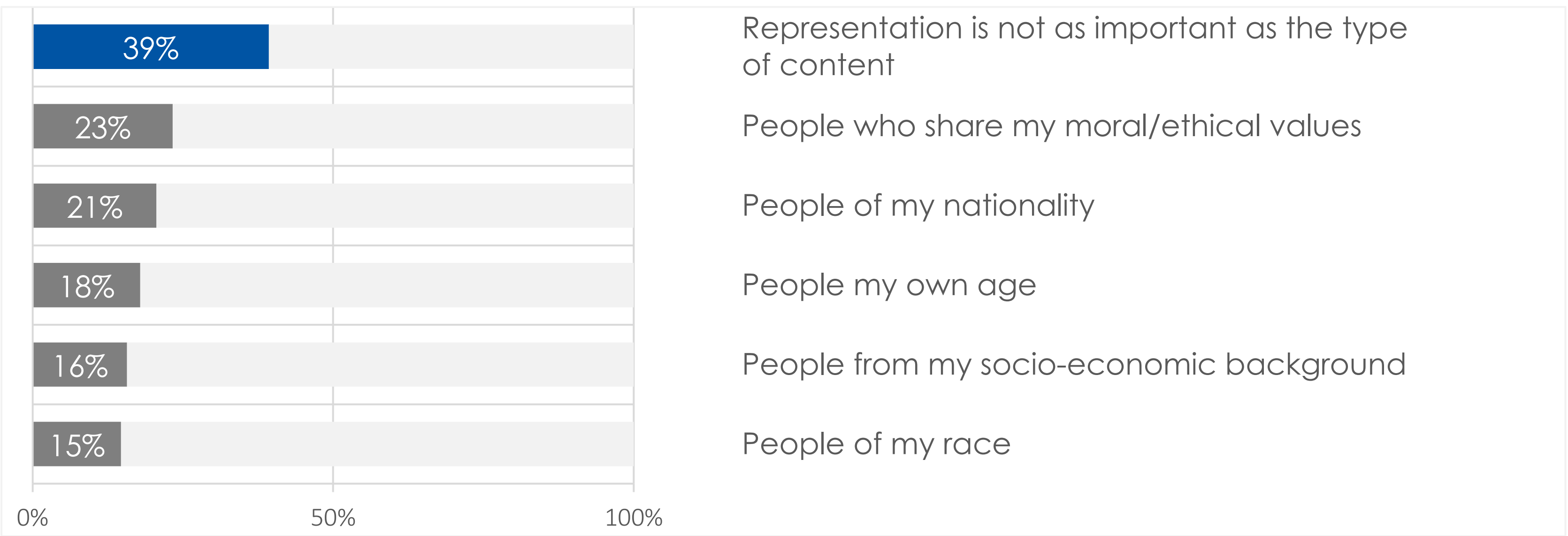
What type of representation do you like to see in the media you consume?



36% stated that representation was not an important factor in their viewing experiences.

Among those who valued representation, commonalities in moral and ethical values, nationality and age were important among 23%, 21% and 18% of respondents, respectively. Socioeconomic background and race were less important, cited by only 16% and 15% of respondents, respectively.

The plurality (roughly 4 in every 10 persons) primarily focus on content rather than representation in the television shows they watch.

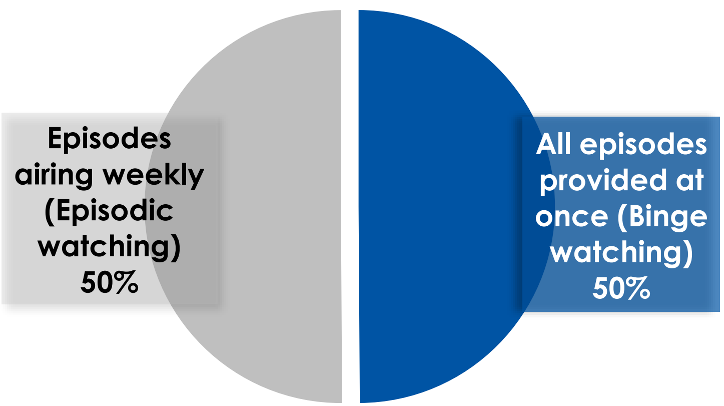


Preferred Viewership Models

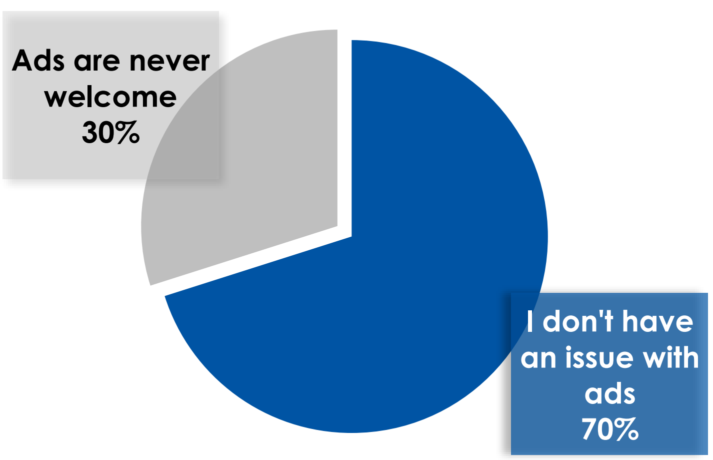
Tolerance for advertisements is relatively high overall, with 70% of respondents saying they have no issue with ads. Most respondents (42%) prefer to watch television shows at no cost and with breaks for advertisements. 32% prefer to pay a low rate and accept ads. Only 27% overall prefer to pay to eliminate ads altogether. Support for episodic viewing is roughly 50:50 with binge watching.

How do you prefer to access television shows?	
I prefer to watch for free, with breaks for advertisements	**42%**
I prefer to pay a lower rate for access, in exchange for just a few ads	32%
I prefer to pay a flat rate for the platform and eliminate all advertisements	26%

How do you prefer to watch television shows?



What are your views on the advertisements which appear in your media?



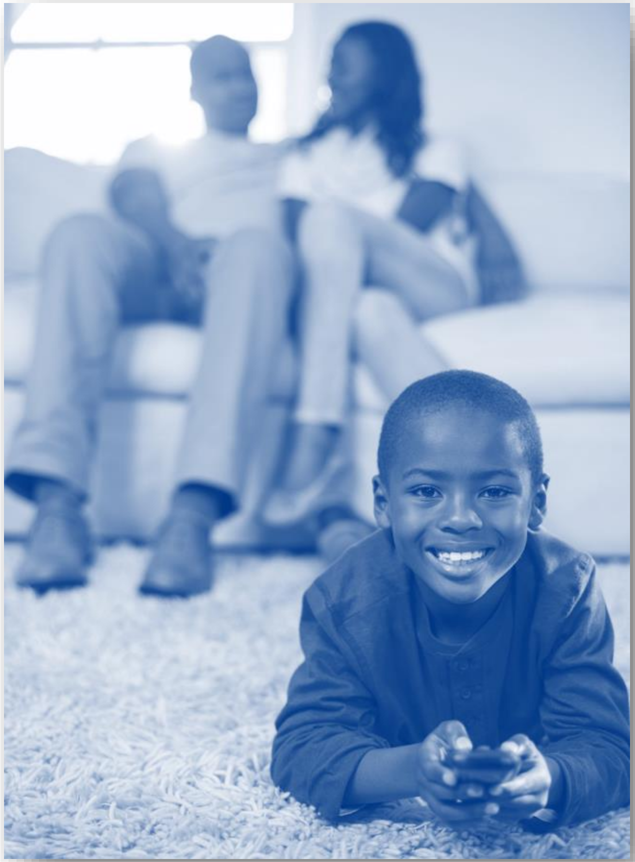
The Television-Viewing Experience

What makes your television viewing experience most enjoyable?

How important is…

	Net Importance
☑ **Audio-visual quality?**	**83%**
☑ **Good reception at my home/location?**	**80%**
☑ **Interesting and engaging content?**	**80%**
☑ **Free to access (no cost)?**	**79%**
☑ **Number and variety of channels?**	**75%**

All the factors listed were considered important by survey respondents to their television-viewing experience. Audio-visual quality was seen as the most important, with a net importance score of 83%. However, three quarters of respondents reported that number and variety of channels was important to them.



Q. How important are each of the following? Use a scale of 0 to 10, where 0 means not at all important, and 10 means essential.

Net Importance was calculated as the sum of all 'Important' scores ranging from 'Somewhat Important' (6 out of 10) to 'Essential Scores (10 out of ten) minus the sum of all 'Unimportant' scores ranging from 'Completely Unnecessary' Scores (0 out of ten) to 'Somewhat Unimportant' (4 out of 10).

Preferred Content

How often do you watch the following types of content overall?

Movies, followed by news are the most popular forms of content, viewed most by a clear majority of respondents.

	I watch a lot	I watch a little	I don't watch
Movies	**63%**	34%	3%
News	**52%**	41%	7%
(Television) Series	45%	46%	9%
Music Videos and Entertainment	43%	45%	12%
Sports	37%	**50%**	13%
Comedy/Improvisation	34%	**56%**	10%
Educational Content	33%	**53%**	14%
Vloggers / Influencers' Social Media feeds	31%	44%	26%
Cartoons/Animation	29%	47%	25%
Religious Programmes	27%	48%	25%
Reality shows/Unscripted/User-generated content e.g., The Kardashians	17%	42%	**41%**

In contrast, reality programming is the least popular category. Only 17% of respondents view this content frequently, and 41% reported not watching at all.

Preferred Television Genres

Programme Categories	I watch all the time
Action	**46.4%**
Comedy	**37.2%**
Sports	**35.1%**
Education	**33.9%**
Drama	**32.9%**
Motivational/Inspirational content	29.7%
Romance	28.3%
Religious Programming	26.6%
Animation	23.1%
Horror/Thriller	23.1%
Nature and Science	21.2%
History	20.7%
Cooking	19.2%
Fantasy and Science Fiction	19.0%
Reality TV	18.2%
Home and Lifestyle	17.2%
Business, Finance and Trade	16.5%

Programme Categories	I watch occasionally
History	**50.2%**
Romance	**49.3%**
Comedy	**47.7%**
Nature and Science	**47.5%**
Home and Lifestyle	**47.5%**
Drama	47.1%
Cooking	46.9%
Education	46.7%
Fantasy and Science Fiction	46.6%
Business, Finance and Trade	46.6%
Sports	46.1%
Motivational/Inspirational content	45.5%
Animation	45.0%
Reality TV	43.4%
Religious Programming	42.1%
Action	41.6%
Horror/Thriller	39.3%

Q. What categories of programming do you prefer, or might want to see more of on local tv?
Multiple responses were allowed; totals may exceed 100%.

Television Genres

Programme Categories	I never watch
Horror/Thriller	**32.0%**
Reality TV	**31.9%**
Business, Finance and Trade	29.4%
Home and Lifestyle	27.5%
Fantasy and Science Fiction	27.4%
Animation	26.8%
Cooking	26.5%
Religious Programming	26.1%
Nature and Science	23.5%
History	22.2%
Motivational/Inspirational content	17.9%
Romance	16.9%
Drama	14.7%
Sports	14.0%
Education	13.9%
Comedy	9.9%
Action	7.5%

Programme Categories	Not my favourites but others might like…
Home and Lifestyle	7.9%
Nature and Science	7.8%
Business, Finance and Trade	7.6%
Cooking	7.4%
Fantasy and Science Fiction	7.0%
History	7.0%
Motivational/Inspirational content	6.9%
Reality TV	6.6%
Education	5.6%
Horror/Thriller	5.6%
Romance	5.4%
Drama	5.3%
Religious Programming	5.2%
Animation	5.1%
Comedy	5.1%
Sports	4.8%
Action	4.6%

Q. What categories of programming do you prefer, or might want to see more of on local tv?
Multiple responses were allowed; totals may exceed 100%.

NEWS SOURCES

Main/primary source of local news/information	
Television news programmes	**50.0%**
Social media accounts of local television/radio/newspapers providers on social media	**22.3%**
YouTube accounts of local television/radio/newspapers providers on social media	8.4%
Radio news programmes	7.7%
Vloggers or other local sites on YouTube or social media	3.9%
Local Newspapers	3.4%
I hear from friends or family on WhatsApp	2.9%
I hear from friends or family on social media	1.4%

Common sources of local news/information*	
Television news programmes	**53%**
Social media accounts of local television/radio/newspapers providers on social media	**44%**
Radio news programmes	**40%**
YouTube accounts of local television/radio/newspapers providers on social media	36%
I hear from friends or family on WhatsApp	29%
Local Newspapers	25%
Vloggers or other local sites on YouTube or social media	21%
I hear from friends or family on social media	20%

Television news programmes are the primary news source for 50% of respondents, followed by social media accounts of local news, radio and newspaper outlets (media) preferred by 22% of respondents.

*Multiple responses were allowed; totals may exceed 100%.

Section 4:
Media Consumer Profiles

Segmentation

Procedure and Value

IBM SPSS v.29.0 was used to create consumer profiles from the survey data using the TwoStep Cluster Analysis procedure. This is an exploratory statistical tool designed to reveal natural groupings within a dataset that would otherwise not be apparent. To automatically determine the most suitable number of clusters, BIC (Schwarz's Bayesian Information Criterion) method was used.

The purpose or benefit to this exercise are as follows:

1. Understanding consumer preferences: Segmentation analysis allows us to identify different groups of television consumers based on their preferences, interests, and viewing habits. This understanding can help Jamaican content providers tailor their programming to better meet the needs and preferences of each group, resulting in higher viewer engagement and loyalty.

2. Developing targeted marketing strategies: By identifying different segments of Jamaican television consumers, content providers can develop targeted marketing strategies that speak directly to the interests and needs of each segment. This can help content providers improve their brand awareness, attract new viewers, and retain existing viewers.

content distribution strategies by identifying which segments of consumers are most likely to watch certain types of content and which channels are most effective for reaching each segment.

4. Improving revenue generation: Segmentation analysis can also help content providers optimize their revenue generation strategies by identifying which segments of consumers are willing to pay for premium content or services, such as ad-free viewing or exclusive content.

5. Overall, segmentation or profiling analysis of television consumers is critical for understanding consumer preferences and behaviors, developing effective marketing strategies, optimizing content distribution, and improving revenue generation. By leveraging this analysis, content providers can provide a more engaging and personalized viewing experience for their audiences, resulting in increased viewership, loyalty, and revenue. It may also help to inform the impending public awareness exercise.

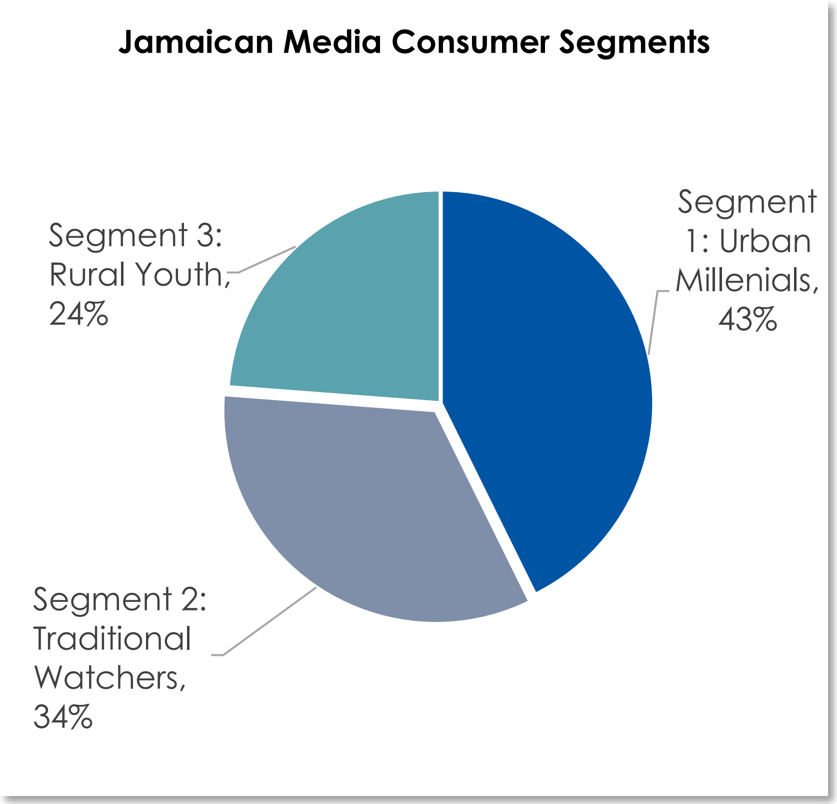
Segmentation
Jamaican Consumers

Survey respondents were classified into three clusters or segments, as shown right.

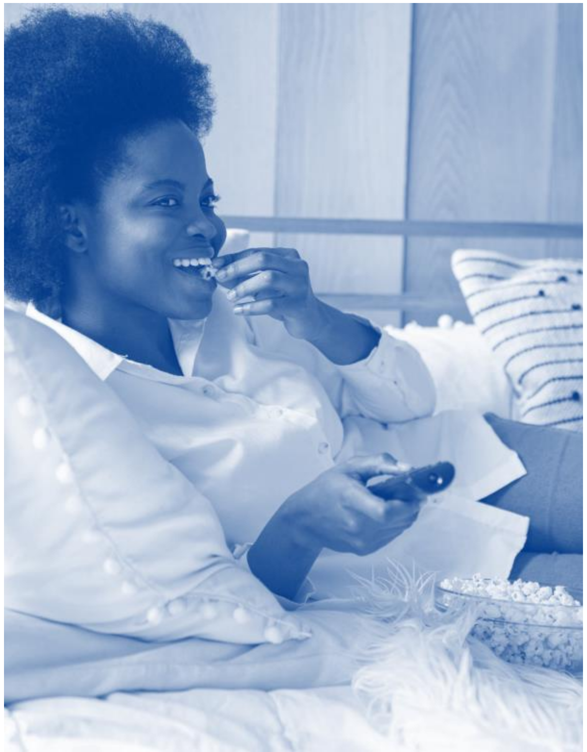
The significant variables used in the segmentation process, in order of decreasing predictive importance were:

1. Platform viewership (predictor importance 1.0)
2. Location category (predictor importance 0.92)
3. Parish (predictor importance 0.33) and
4. Age (predictor Importance 0.22)

The characteristics of these three groups are detailed on the following pages.



1. Urban Millennials



"I like to try new products and keep up with trends"

Segment Size: 43% of Consumers of Television Content

This segment enjoys convenience and flexibility in television viewing. They actively engage with social media and streaming platforms while on-the-go. Most enjoy binge watching programmes. As a group, they have low engagement with FTA local channels, and this is reflected in lower likelihood of upgrading their digital televisions to obtain more local television channels (when compared to other segments).

Demographics

- Predominantly Millennials: Most (79%) are between 24-45 years old
- Most are single – with children (23%) or without children (41%)
- Most are middle to upper socioeconomic level
- All live in cities and other urban locations. Most are located in Kingston and St. Andrew (33%) and St. Catherine (32%).

Low awareness of Digital TV Switchover (64% have never heard of it)

Television Viewing	Acceptance of DSO
YouTube and social media and other online platforms (66%) are the platforms used most. 41% have increased their engagement with streaming platforms over the past year, while 26% reported watching less free-to-air TV over the same period.	78% would welcome more local television channels 63% would change their TV sets to ATSC 3.0 digital televisions
Television is the primary device used (76%), but a large proportion view content on smartphones (53%), as well as laptops or computers (21%) and tablets (17%). While most watch television at home (88%), one in four regularly watch TV in groups at the homes of friends, and some regularly watch television during their commutes (13%).	They are the least cost-sensitive segment, with most willing to purchase a new digital device at full price. However, tolerance for ads is lowest among this group. One third prefer to pay to eliminate all ads, and another third would pay a low rate to reduce ads.

2. Traditional Watchers

"I am practical and stick with the necessities. Value for money is key"

Segment Size: 33% of Consumers of Television Content

Watching local television is part of the established routine of members of this segment who find it reliable, accessible and affordable. They are twice as likely as other segments to value local television over international programming for seeing Jamaican people, culture and values. Most prefer episodic viewing over binge watching television programmes. While they are cost-conscious, their high engagement with FTA local channels is reflected in higher reported likelihoods of upgrading their digital televisions to obtain more local television channels.

Demographics

- Predominantly older than 35 years old (77%)
- Many have families (22% have mature families - some or all children above the age of 10 years old, and 25% are seniors, whose children are all adults)
- Most are lower to middle socioeconomic level
- Distribution is spread across all parishes and location categories (urban and rural)

Medium awareness of Digital Switchover (52% have heard of it)

Television Viewing	Acceptance of DSO
Local television channels (75%) followed by foreign cable television (25%) are the platforms used most. 29% have increased their engagement with streaming platforms over the past year, and 12% reported watching less free-to-air TV over the same period.	90% would welcome more local television channels 76% would change their TV sets to ATSC 3.0 digital televisions
Television is the primary device used (81%). One in four persons also reported using their smartphones to view television content, but few use tablets or computers (less than 10%). Television is typically watched at home. Few reported regularly watching TV in public spaces or other locations.	They are cost-sensitive, with most opining that they would only purchase a new digital device if it was on sale or discounted (60%). Tolerance for ads is highest among this group, with the majority (53%) preferring to watch for free with breaks for advertisements.

3. Rural Youth

"I go where I get the best entertainment and information experience, whether that is local or international programming"

Segment Size: 24% of Consumers of Television Content

The cost effectiveness of streaming platforms compared to cable subscriptions is a factor influencing its high uptake among this group. The most cost conscious of the segments, many still have high engagement with FTA local channels. As a result, three in every four persons would upgrade their digital televisions to obtain more local television channels.

Demographics

- Predominantly Generation Z and Millennials: Most (67%) are between 20 and 40 years old
- Most are single – with children (23%) or without children (40%)
- Typically, lower to middle socioeconomic level
- Live outside of cities and other urban locations.

Low awareness of Digital TV Switchover (65% have never heard of it)

Television Viewing	Acceptance of DSO
Streaming sites (62%) followed by local television channels (49%) are the platforms used most. 51% prefer/use Netflix over YouTube (49%). 44% have increased their engagement with streaming platforms over the past year, while 28% reported watching less free-to-air TV over the same period.	86% would welcome more local television channels 76% would change their TV sets to ATSC 3.0 digital televisions
Television is the primary device used (72%). Just over half of persons also reported using their smartphones to view television content. 15% also regularly use tablets or computers. Television content is typically watched at home. Some regularly watch television at the homes of friends (18%), during their commutes (13%) and at public spaces (e.g. bars and restaurants, 11%).	They are very cost-sensitive, with most opining that they would only purchase a new digital device if it was on sale or discounted (67%). The plurality prefer to watch TV for free with breaks for ads (41%), while another 29% would be willing to pay a low rate for access, in exchange for just a few ads.

Appendix 1:
Methodology and Survey Respondent Demographics

Methodology

FIELDWORK DATES

Surveys were administered between January 30, 2023, and February 24, 2023.

SURVEY INSTRUMENT

The instrument consisted of seventy-six questions, which took, on average, 16 minutes to administer to respondents. Prior to the launch of the survey, the instrument was tested for accessibility (potential issues with questions that are not clear or might present usability issues for both interviewers and respondents) and structured to minimise survey fatigue where possible.

Fatigue Score

Accessibility

SAMPLE SIZE

Two thousand, three hundred and thirty-four persons attempted the survey, of which 39 were disqualified through screening questions for suitability to undertake the survey, and 261 did not complete the process. The final sample size was 2,034 with a margin of error of ±2% at a 95% Confidence Level.

DATA COLLECTION

Quantitative Research: Anonymous Computer-Assisted Personal Interviewing (CAPI) methodology was used. Survey data collection was by in-person (face-to-face) interviews using devices to administer the questionnaire and capture the answers. This took the form of structured interviews, flowing as dialogues between the interviewer and the survey respondent. The interviews were guided by predefined questionnaires loaded and driven by a tablet or smartphone. The survey team consisted of fifty-eight trained interviewers.

DATA ANALYSES

Data were analyzed for frequencies (counts), measures of central tendencies (means) and cross tabulations with the purpose of segmenting the results by key variables where applicable. Cluster analyses were also conducted. Microsoft Excel for Microsoft 365 and IBM SPSS v 29.0 were used to conduct these analyses.

Survey Respondent Overview

2034 respondents

48% Male

52% Female

HIGHEST EDUCATIONAL LEVEL

Primary/ Prep School	4%
Secondary/ High school (incomplete)	17%
Secondary/ High school up to 5th/6th form	35%
Vocational/ Technical	17%
College/ University Certificate/ Diploma	14%
Bachelor's Degree	8%
Professional Certifications e.g., ACCA, CFA	1%
Professional Degree (Law, Medical)	1%
Master's/ Doctoral Degree	1%

OCCUPATION

Senior Executive/ Business Executive/C-Suite	1%
Top Manager, VP, Marketing Director, Financial Director	1%
University Lecturer	2%
IT Specialist, Health Specialist, etc., Account Executive	3%
Public Servant (Teacher, Nurse, Social Worker etc.), Pastor, large to Commercial farmer	11%
Snr. Secretary/ Personal Assistant	2%
Supervisor, Musician, Singer, Actor	3%
Middle Manager, Internal Auditor, School Principal	2%
Skilled Worker/ Technician	11%
Clerk/Secretary, Store Clerk, Telephone Operator, Basic Schoolteacher, Hairdresser	11%
Factory Worker, Shopkeeper, Bar Operator, Construction Worker, Painter, Plumber, Mechanic, Carpenter	13%
Taxi Owner/ Security Guard/ Taxi Driver/ Bus Driver	7%
Vendor, Counter Clerk, Barmaid	5%
Bearer/ Messenger	0%
Nurses Aid/ Practical Nurse/Helper	3%
Labourer/Gardener/ Small Farmer	7%

AGE GROUP

18-19 years	7%
20-24 years	17%
25-34 years	22%
35-44 years	21%
45-54 years	15%
55-59 years	9%
65+ years	10%

PARISH

Kingston & St. Andrew	25%
St. Catherine	19%
Clarendon	9%
St. James	7%
Manchester	7%
St. Ann	6%
St. Elizabeth	6%
Westmoreland	5%
St. Mary	4%
Trelawny	3%
Hanover	3%
Portland	3%
St. Thomas	3%

Appendix 2:
Socioeconomic Level Determinations and Findings

Socioeconomic Level Determination

Education + Occupation

Socioeconomic level (SEL) was calculated by assigning scores to levels of education and type of occupation. Participants with higher levels of education and more managerial or academic occupations were scored more highly according the scales outlined in the table to the right. These scores were tallied and used to determine the socioeconomic levels of the survey participants

Kuppuswamy Scale (1976) modified for Jamaica, 2023.

Total Score	Socioeconomic Level
8-10	Upper SEL
4-7	Middle SEL
1-3	Lower SEL

No income data was collected. High rates of scepticism and reluctance to disclose among the populace (owing to incidences of financial fraud and scamming) might have negatively impacted survey respondent willingness and completion rates.

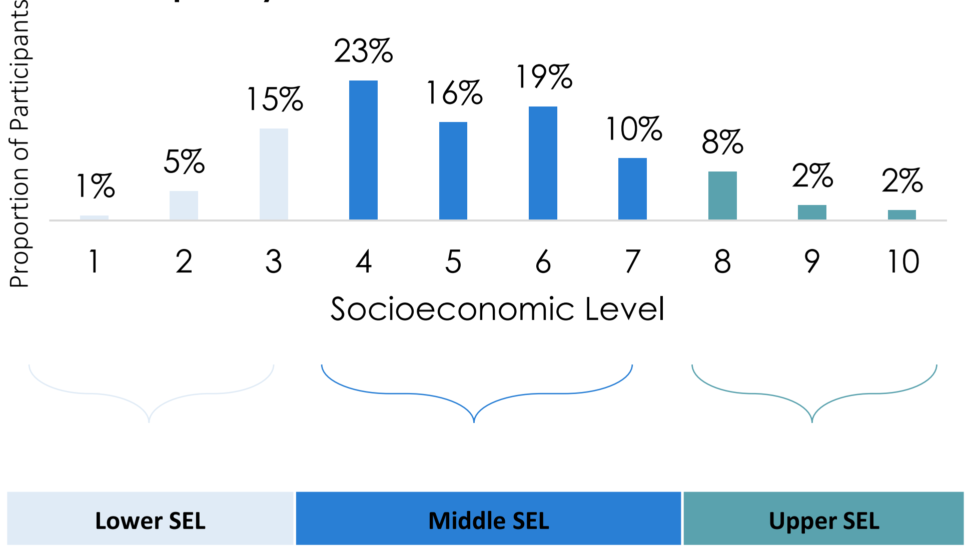
Occupation (scores)	Education (scores)
Senior Executive/ Business Executive/C-Suite - 5 Top Manager, VP, Marketing Director, Financial Director - 5 University Lecturer - 5 IT specialist, health specialist, etc., Account Executive - 5	Professional Certifications e.g. ACCA, CFA - 5 Professional Degree (Law, Medical) – 5 Master's/ Doctoral Degree - 5
Public servant (teacher, nurse, social worker etc.), Pastor, large to Commercial farmer - 4 Snr. Secretary/ Personal Assistant - 4 Supervisor, Musician, Singer, Actor - 4 Middle manager, Internal Auditor, School Principal - 4 Skilled worker/ Technician - 4	Bachelor's Degree - 4
Clerk/Secretary, Store clerk, telephone operator, basic schoolteacher, hairdresser - 3	College/ University Certificate/ Diploma - 3
Factory worker, shopkeeper, bar operator, construction worker, painter, plumber, mechanic, carpenter) -2 Taxi owner/ Security Guard/ taxi driver/ bus driver -2 Vendor, counter clerk, barmaid -2 Bearer/ Messenger -2 Nurses Aid/ Practical Nurse/Helper -2	Secondary/ High school up to 5th/6th form - 2 Vocational/ Technical - 2
Labourer/Gardener/ Small Farmer – 1 N.B. Recently unemployed or retired were asked to select their previous occupation, and housewives, students or caregivers indicated the occupation of the main income earner for the household.	No formal education – 0 Primary/ Prep School - 1 Secondary/ High school (incomplete) - 1

Socioeconomic Level Determination

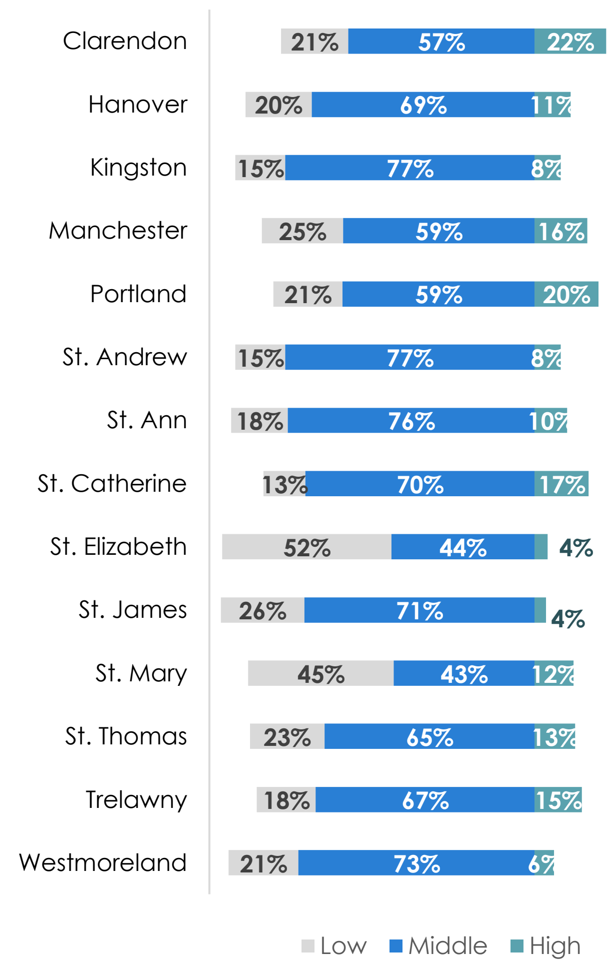
Education + Occupation

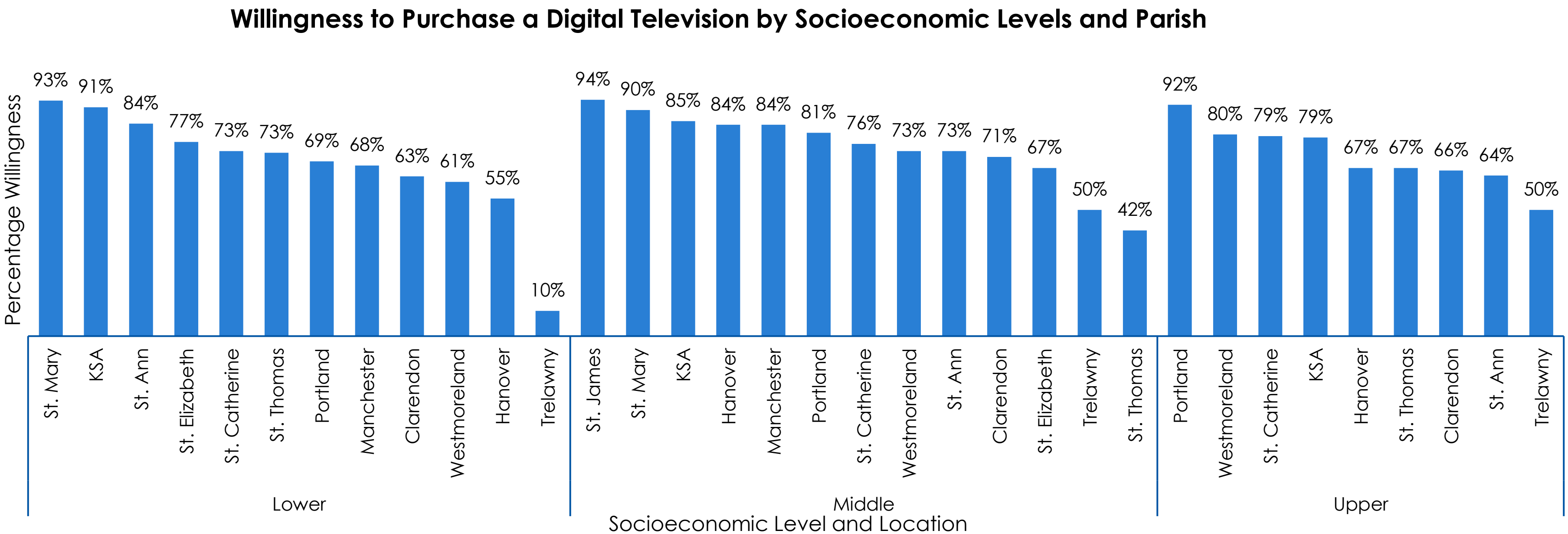
The frequency of survey participants displayed a normal distribution by socioeconomic level. The majority of participants (67%) fell in the categories ranging from 4 to 7. This represented the middle range. Only 12% of participants fell in the range of 8 to 10 (the high range), while 21% fell in the 1 to 3 range (low range)

Frequency Distribution of Socioeconomic Level



Socioeconomic Range by Parish




Willingness to Purchase a Digital Television by Socioeconomic Levels and Parish
Percentage Willingness
93%
91%
84%
77%
73%
73%
69%
68%
63%
61%
55%
10%
94%
90%
85%
84%
84%
81%
76%
73%
73%
71%
67%
50%
42%
92%
80%
79%
79%
67%
67%
66%
64%
50%
St. Mary
KSA
St. Ann
St. Elizabeth
St. Catherine
St. Thomas
Portland
Manchester
Clarendon
Westmoreland
Hanover
Trelawny
St. James
St. Mary
KSA
Hanover
Manchester
Portland
St. Catherine
Westmoreland
St. Ann
Clarendon
St. Elizabeth
Trelawny
St. Thomas
Portland
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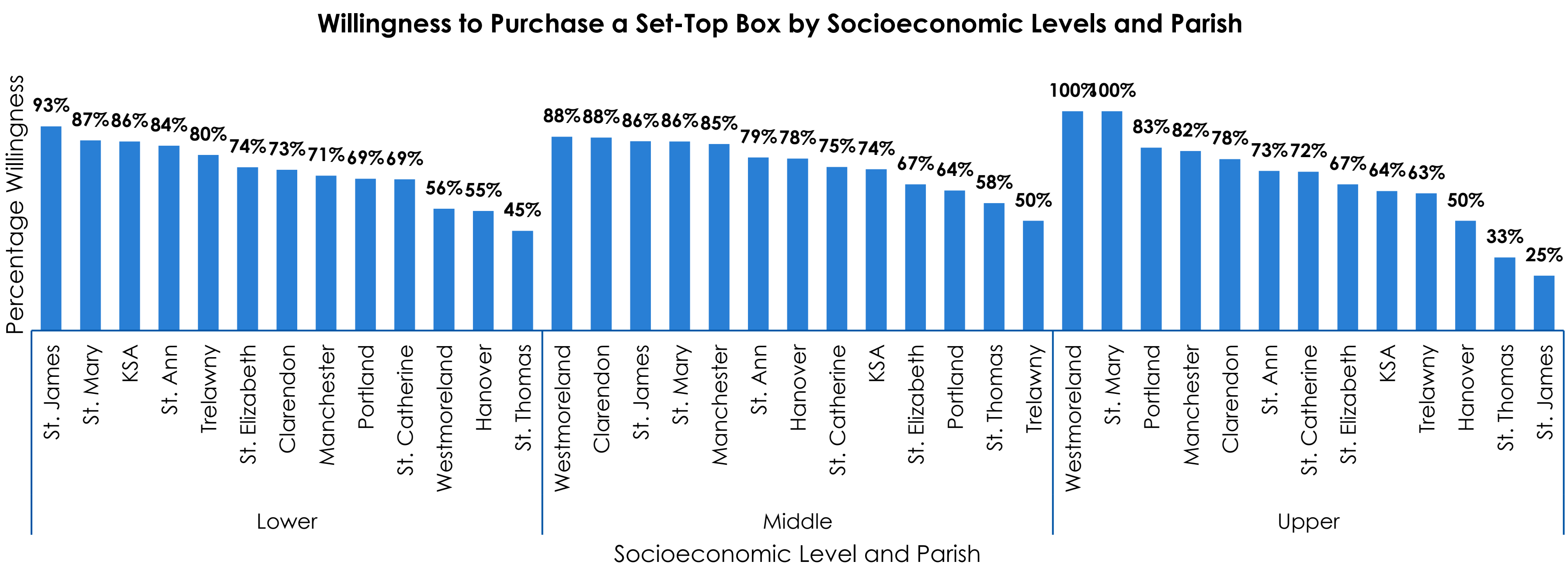
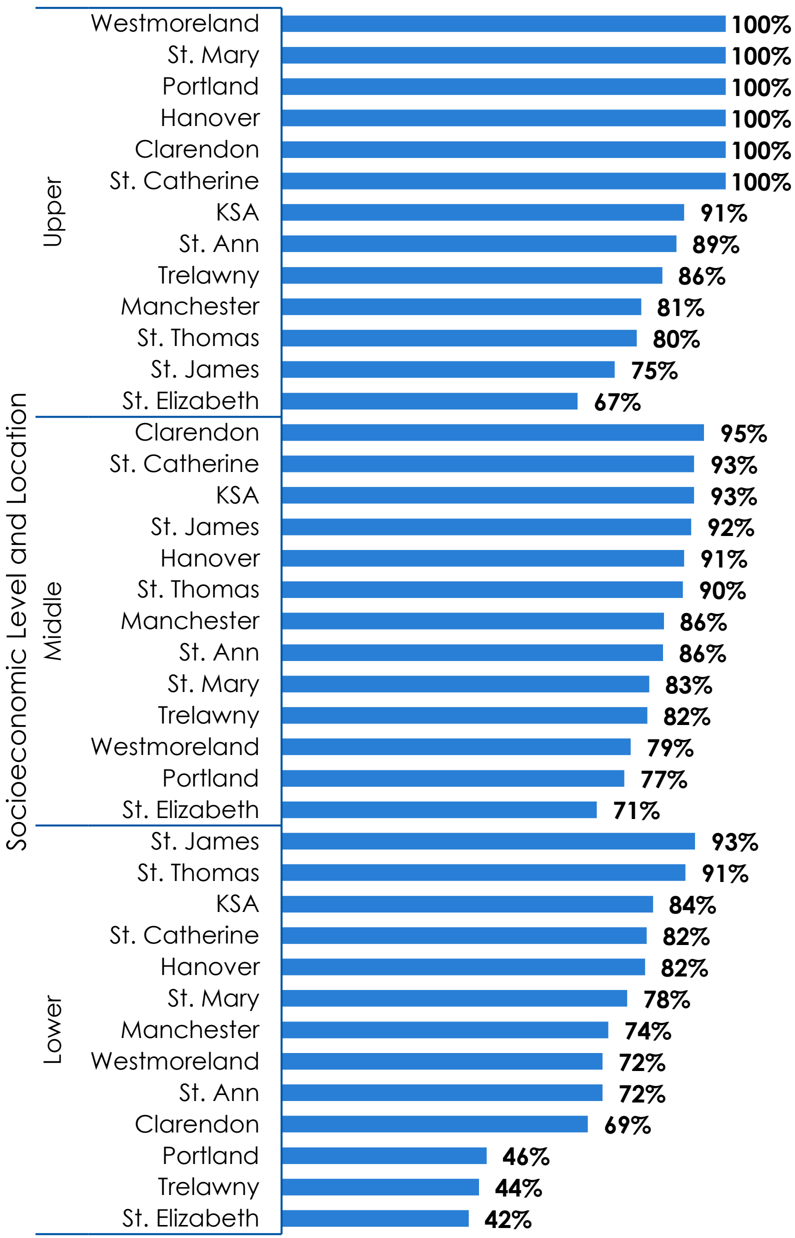
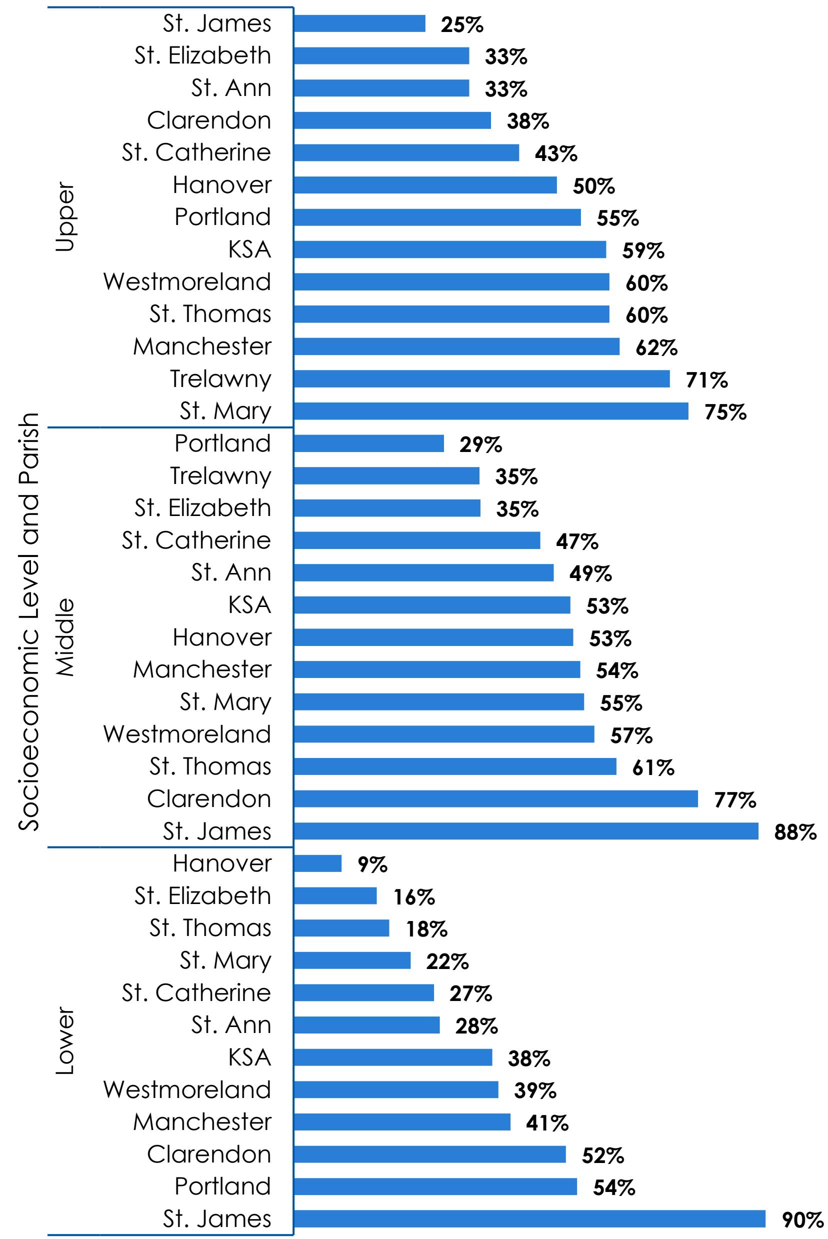
St. Catherine
KSA
Hanover
St. Thomas
Clarendon
St. Ann
Trelawny
Lower
Middle
Upper
Socioeconomic Level and Location

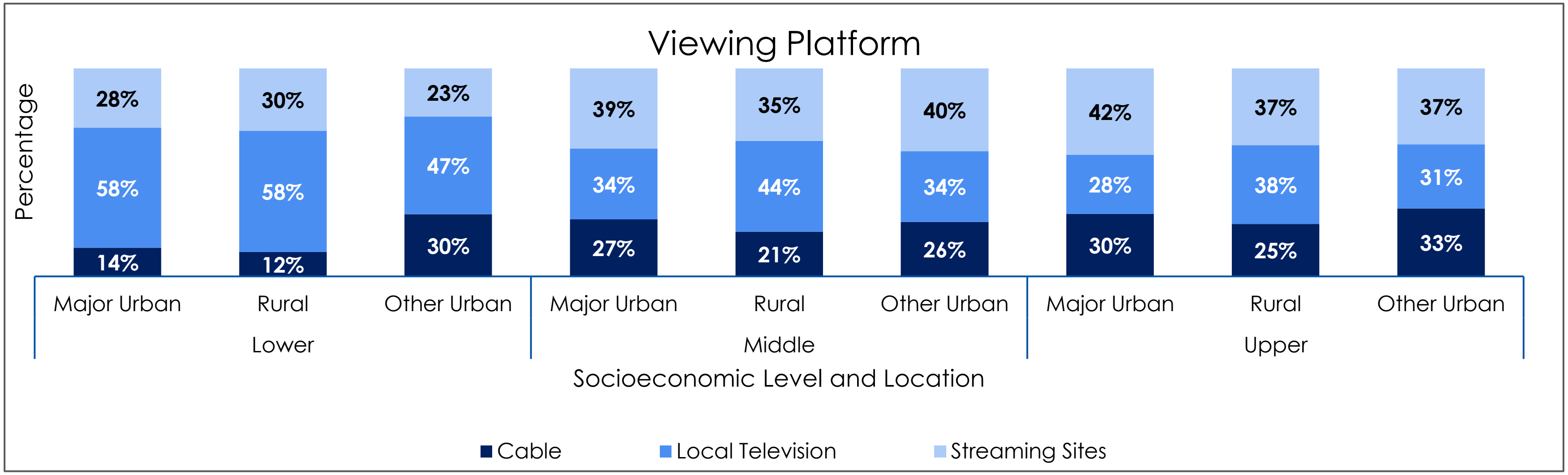

Willingness to Purchase a Set-Top Box by Socioeconomic Levels and Parish
Percentage Willingness
93%
87%
86%
84%
80%
74%
73%
71%
69%
69%
56%
55%
45%
88%
88%
86%
86%
85%
79%
78%
75%
74%
67%
64%
58%
50%
100%
100%
83%
82%
78%
73%
72%
67%
64%
63%
50%
33%
25%
St. James
St. Mary
KSA
St. Ann
Trelawny
St. Elizabeth
Clarendon
Manchester
Portland
St. Catherine
Westmoreland
Hanover
St. Thomas
Westmoreland
Clarendon
St. James
St. Mary
Manchester
St. Ann
Hanover
St. Catherine
KSA
St. Elizabeth
Portland
St. Thomas
Trelawny
Westmoreland
St. Mary
Portland
Manchester
Clarendon
St. Ann
St. Catherine
St. Elizabeth
KSA
Trelawny
Hanover
St. Thomas
St. James
Lower
Middle
Upper
Socioeconomic Level and Parish

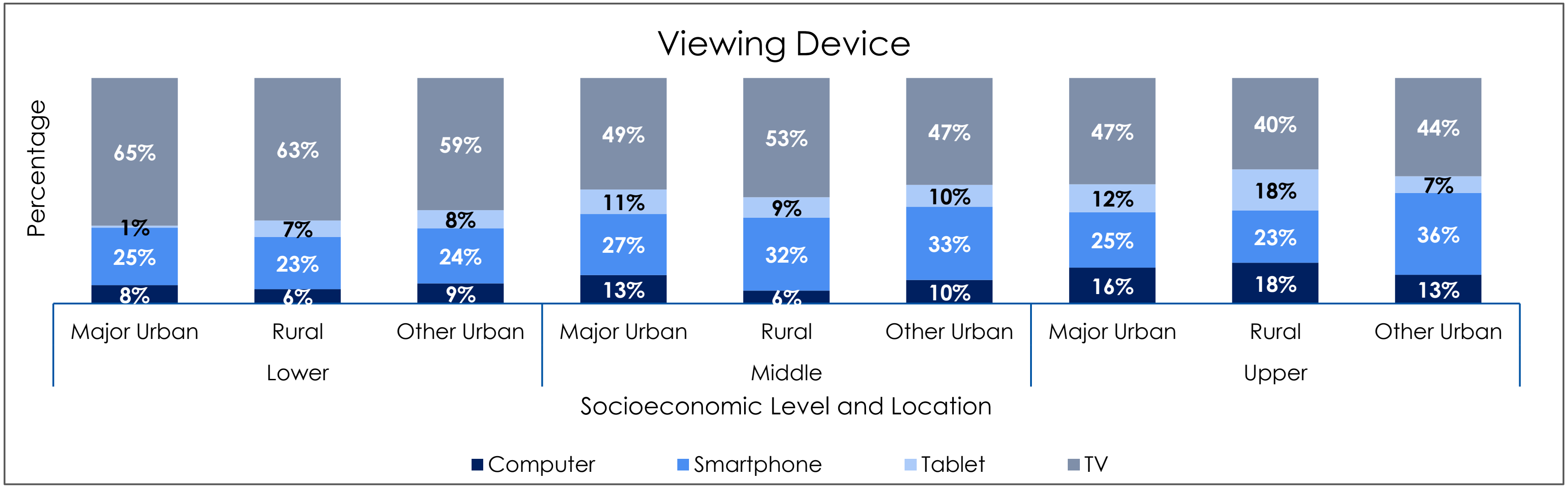
Household Wi-Fi by Socioeconomic Levels and Parish



Set-Top Box Ownership by Socioeconomic Levels and Parish



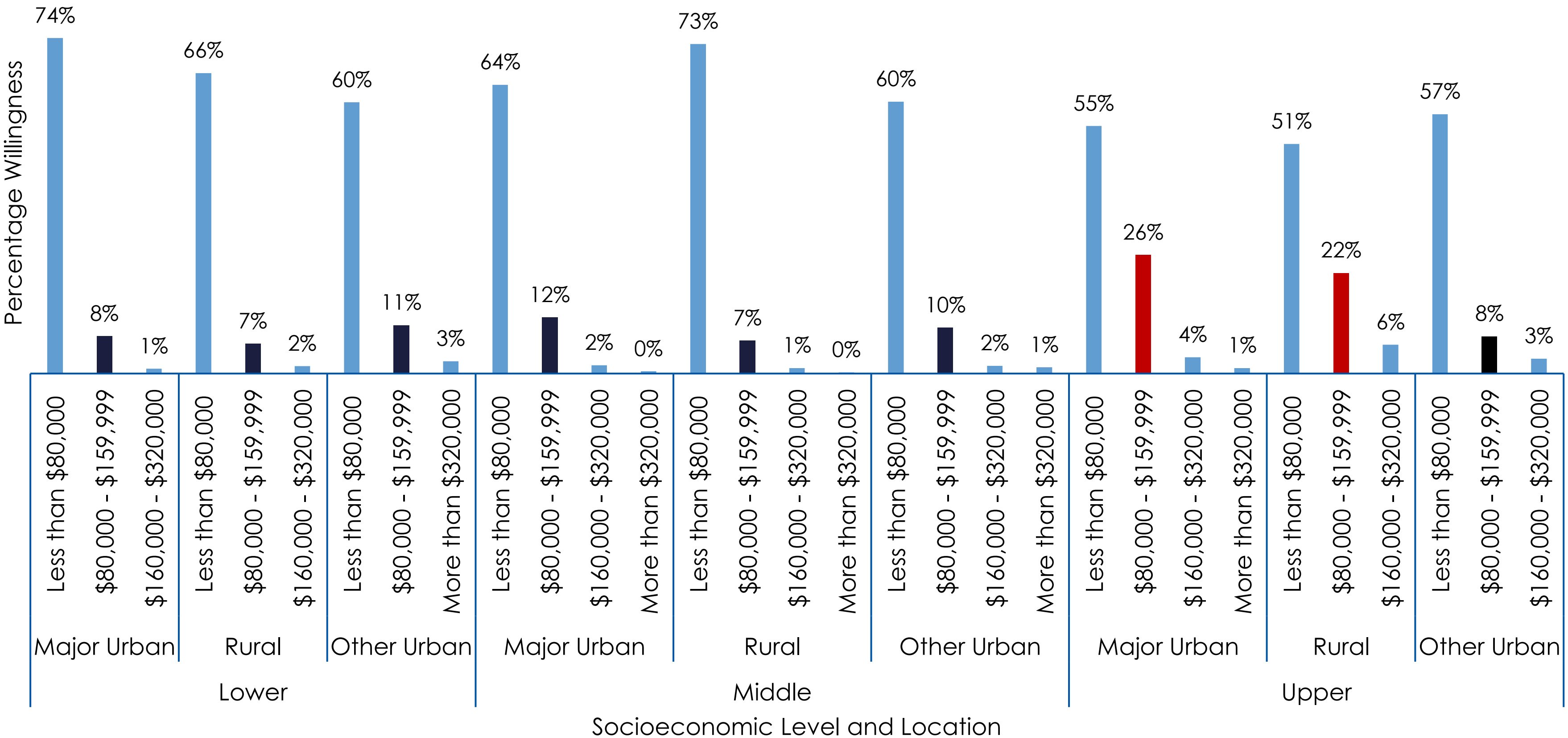




More individuals at the lower SEL cross all areas watch local free-to-air television (47% - 58%) than those in the middle and upper SELs (28% - 47%).

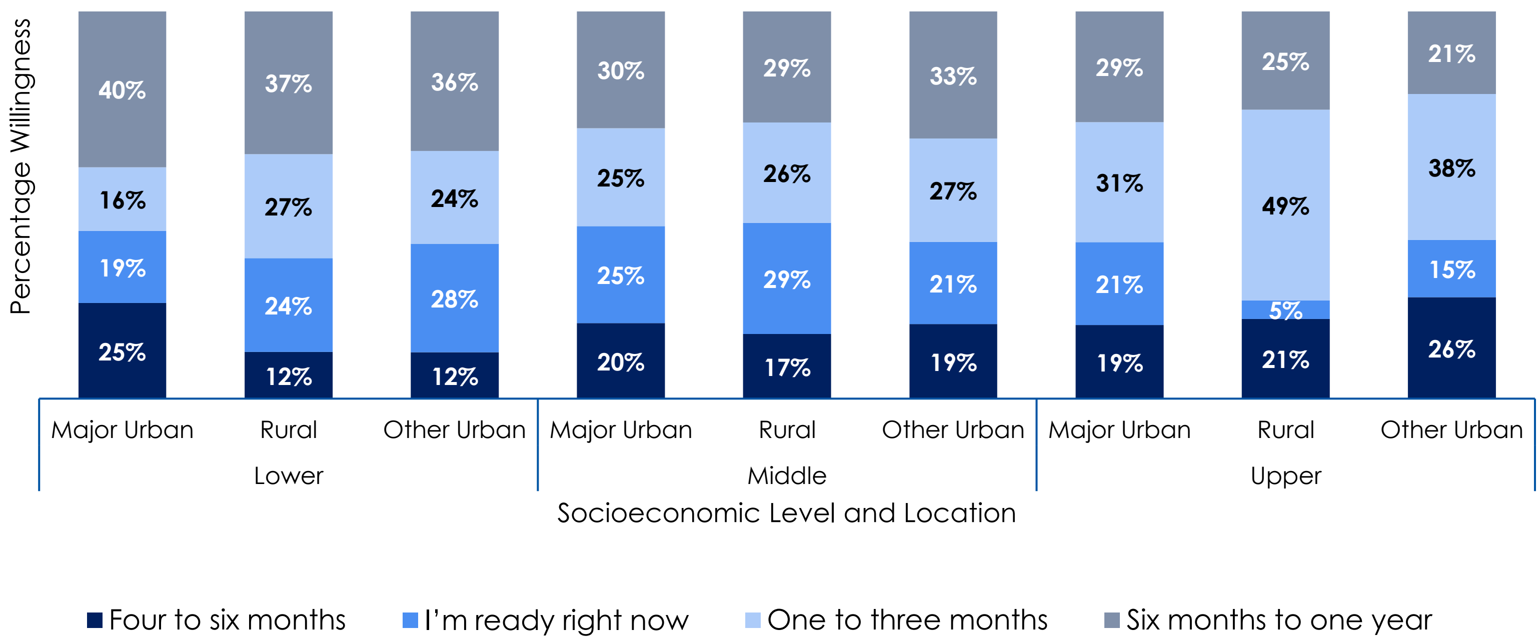
Most individuals watch television programmes on their television sets, with more individuals at the lower SEL (59% - 65%) when compared to the middle and upper SELs (40% - 53%). Fewer individuals at the lower SEL use smartphones and computers to view television (6% - 9%) than at the middle and upper SELs (10% - 18%)

Willingness to Purchase a Digital Television by Location and SEL



26% of individuals at the upper SEL in major urban and 26% of those in rural areas were twice as willing to pay between $80,000-$159,999 for a digital television than any other group (between 7% and 12%).

Readiness to Obtain a Device to Access Local Television Channels by Socioeconomic Levels and Locations



Readiness varied among all groups, with the highest percentage (49%) recorded among rural areas at the upper SEL stating their readiness to be within one to three months. Apart from this high in this time period, the range extended from 16% in major urban areas at the lower SEL to 38% in other urban areas at the upper SEL.

Only 12% would be ready within four to six months in rural and other urban areas of the lower SEL. Between 21% and 40% would be ready within six to twelve months.