



Study of the Output of Jamaica's Electronic Media Sector Content

A FINAL REPORT

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for the
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EXECUTIVE SUMMARY

The Broadcasting Commission of Jamaica commissioned the Caribbean Institute of Media and Communication (CARIMAC), the University of the West Indies Mona to conduct research in an effort to understand audience needs in relation to the local electronic media; the output of Jamaica's electronic media sector; the public perception of media regulation in Jamaica; and the implementation of the Children's Code for Programming.

The research was based on a multi-method design, incorporating both quantitative and qualitative approaches. A quantitative survey was used to collect data from 2065 individuals. A content analysis reviewed a sample of television (local cable channels and free-to-air) and radio broadcasters selected from a two-week period. For the qualitative component, ten focus groups were conducted with just over 80 persons participating in discussions held in five parishes. Semi-structured interviews were done with fifteen media managers and executives from a range of broadcast and cable entities.

This summary of the study's findings is presented according to the main research questions below. This is followed by recommendations.

1. What is the output of the Jamaican electronic media sector?

On free-to-air television channels, a wide range of programming was identified in the sample from factual programmes, including news, current affairs and sports, to entertainment programming in the form of movies, lifestyle, reality and game shows. On the local cable channels sampled, the programmes included mostly music video shows and sports programmes. On radio, the sample included programmes devoted to music, talk shows, live broadcasts of special events, government bulletins and religious programmes.

2. What types of TV programmes is the Jamaican population watching on local free-to-air and cable television stations, and the Internet?

The two highest reported categories watched on local television by survey participants were news (80.7%) and movies (45.6%). In addition to these categories, respondents watched comedies, reality programmes, entertainment shows and sitcoms. Across both local and foreign channels the top three types of programmes that respondents liked to watch on cable television were sports (81.3%), movies (42.6%) and news (24.3%). When asked to specify which other programmes they liked to watch on cable channels, the range of responses included cartoons, comedy, drama, local plays, investigative shows, and movies. A smaller number of respondents (20.4%) watched local television programmes on the Internet when compared to those who watched foreign television programmes on the Internet (40.8%). Examples of local television programmes watched on the Internet included news and current affairs, and entertainment shows such as reality TV. Examples of foreign programmes watched on the Internet included entertainment shows such as drama series, sitcoms and reality TV.

3. What types of radio programmes is the Jamaican population listening to on local stations and the Internet?

The top three types of programmes respondents listened to on Jamaica's radio stations were news (59.9%), music (66.6%) and current affairs shows (36.9%). In the "other" category, respondents indicated that they listened to early morning programmes, such as *Wake Up Call* with Ron Muschette; talk shows such as *Perkins on Line* and *Ragashanti Live*; and educational and health programmes. Politics, comedy and entertainment were also named among the "other" responses, while some persons listened to the weather and 'everything' on radio. Only a relatively small number (19.9%) of respondents stated that they listened to local radio programmes on the Internet. An even smaller number (9.6%) listened to foreign radio programmes on the Internet. The types of local radio programmes consumed on the Internet included mostly music programming and current affairs shows, adult talk shows and news magazine programmes. The types of foreign radio programmes consumed on the Internet included mostly music and news.

4. What kinds of local television and radio programmes do Jamaicans want to see and hear?

Music and talk shows were two commonly cited types of local television programmes that the respondents wanted to watch. At the top of the list of the “other” programmes to watch on local television were documentaries, educational programmes, local shows or productions.

Respondents also wanted to watch movies, music and educational programmes on local cable channels. Sitcoms appeared as the most popular “other” response among respondents when asked what kinds of local cable television programmes they wanted to watch.

On radio, respondents wanted to hear music, current affairs talk shows and other programming, such as educational programmes, non-political and unbiased talk shows as well as cultural and community development programmes

5. Are Jamaicans aware of the BCJ and its role?

Over two-thirds (69.5%) of the sample knew that media content is regulated in Jamaica and approximately 52.9% correctly identified the Broadcasting Commission of Jamaica as the regulatory body. About half of the respondents (49.2%) had seen advertisements about the BCJ on television, in newspaper, on bus panels or heard them on radio.

A little under half of respondents (46%) agreed that the BCJ is visible and an almost similar number (44.5%) agreed that the BCJ does a good job of promoting issues regarding electronic media content regulation and policy. Eight percent (8.2%) of the sample noted that they had visited BCJ’s website. For those persons visiting the website, 48.5% agreed that they were able to get the information that they needed. Thirty-seven percent (37.2%) found the BCJ website to be user-friendly.

6. Do Jamaicans understand the BCJ's role and functions?

About ninety-three percent (92.6%) of respondents believed that the Commission is needed and many stated that a regulatory body was important to ensure that broadcast programme content was appropriate for different levels of audiences. The respondents had a fair to positive perception of the BCJ. Almost sixty-three percent (62.8%) agreed that the BCJ was effective in carrying out its role; however, just over a third (37.4%) agreed that Jamaicans were generally supportive of the way in which the BCJ carried out its mandate.

Just under ninety-seven percent (96.8%) of respondents indicated that they had never complained to the BCJ about Jamaican media. Of those who complained to the BCJ (3.2%), 27% agreed and strongly agreed that the BCJ was responsive to their complaints, while 14.6% disagreed and strongly disagreed.

7. What do Jamaicans think of the Children's Code for Programming?

Ninety-six percent (96.1%) of survey respondents reported that they had seen or heard announcements at the start of TV shows advising of the show's content and its appropriateness for children. Just under seventy-six percent (75.9%) said that they used the ratings or advisories to help them monitor what their children were watching on television. Over two-thirds (70.3%) of the sample felt that their cable provider offered suitable packages for families with children and 65% felt that programme ratings were effective.

8. How do local media managers view the BCJ's work?

Fifteen media managers were consulted regarding their views of the BCJ's work during qualitative interviews. There were mixed reactions towards the BCJ with some viewing the BCJ positively and others having a negative perception of the regulator. Some managers noted a marked improvement in the way the BCJ handled breaches, indicating that it had become much more consultative and accommodating. Other media managers believed that aspects of the regulatory framework were not comprehensive, and that there had been insufficient consultation and dialogue in arriving at some regulations. Some of the concerns that managers

had stemmed from a range of policies and directives articulated by the Commission over several years. It was evident that some of the concerns were based on a misunderstanding of the regulatory issues.

Based on the findings of the research, the following recommendations are presented:

- The BCJ should explore creative and affordable ways to facilitate local content production, with an emphasis on expanding the variety of genres of audio and video content.
- It is not only important to expand the variety of programming, but also necessary to ensure that the programming is more positive to provide some balance to the somewhat negative content that currently obtains in some Jamaican media.
- The BCJ should provide more detailed explanation of programming codes and make this information more accessible in various formats.
- Regarding the digital switchover, the BCJ should facilitate broadcasters in finding ways to manage the switchover by identifying affordable options such as conversion technologies.
- The BCJ should increase public awareness campaigns, in both urban and rural settings, that focus on the services it provides.
- While the BCJ is already implementing strategies to manage the Jamaican public's perception of the Commission and its work, it needs to increase its efforts to make the public more aware of its role and functions.

- The BCJ should explore establishing a communication mechanism which puts it in direct and regular contact with stakeholders, thus creating a stronger link between the BCJ and the sector it serves.
- The BCJ should consider providing the rationale for its actions, that is explaining how it reaches its decisions regarding regulatory matters as this is not always clear to members of the public.

INTRODUCTION

The Broadcasting Commission of Jamaica's (BCJ) regulatory mandate requires it to know the types of programmes being broadcast on local radio as well as on local free-to-air and cable television stations. The Commission also needs to know whether these programmes meet the relevant technical, programming and service standards. Additionally, it is important for the Commission to gain an understanding of not only the electronic media sector's needs and expectations, but also the Jamaican audiences' expectations of the media and their perceptions of media regulation within the country. The BCJ must also determine how the media sector, as well as the Jamaican public, view the Commission and its work - including the development and implementation of the Children's Code for Programming - in order to assess its own performance, formulate policies and plan strategically.

The BCJ has, as its primary functions, the administration of various broadcasting acts, the overseeing of compliance with required standards (including quality and content), policy review and advice and research on media issues (Dunn, 2008). A key function of broadcasting regulatory agencies is to determine what is harmful with regard to sexual and violent content, with the protection of children being the primary concern. Achieving this objective is sometimes difficult, since the consumption habits and preferences of mature audiences should not be unduly restricted. An additional consideration is that regulatory bodies protect or preserve freedoms of speech and access to information. Generally speaking, broadcast regulatory bodies are guided by standards that "address the complex issue of how to regulate in the public interest and yet prevent that regulation from becoming a means of government control. [These standards] also address the need for regulators to prevent commercial interests from becoming excessively dominant and to ensure that broadcasting serves the interest of the public as a whole" (Mendel, 2002, p. 1).

It is also a part of the regulatory mandate to protect viewers so that they are forewarned of the content in an upcoming programme. This is done so that media consumers can make informed choices. There has also been emphasis on the requirement that offensive content should not be shown until after the watershed period of 9:00 p.m. when children are presumed to be asleep. With this in mind, one notes that the overall goal is the protection of those who consume media. Dunn's (2010) suggestion that the broadcast regulator protects and enhances cultural and social values is in keeping up with other practices of regulatory framework. While protection of viewers is the responsibility of regulatory boards, media practitioners also play an integral role in this regard. Ruth and Mendel (n.d., p.16) contend that "journalists and other media professionals must constantly strive to be highly professional, to remain aware of the evolving standards in the codes to which they are subject, and to act in the 'public interest'."

The role of broadcasting regulators is one that has increasingly evolved, given the emergence of new media forms. Indeed, the "digital age" has been deemed transformative because of the impact of globalisation, media convergence, digitalisation, next generation broadband technologies and personal citizen media (Dunn, 2008). Blogging, micro-blogging, and sites that allow for content sharing, such as YouTube, make regulation difficult and challenge regulators to implement new strategies, policies and approaches (Dunn, 2010).

With the emergence of new types of media and the complexities surrounding their regulation, other forms of media user protection may become necessary. Such protection may come in the form of media literacy, where persons recognize their ability to critically assess and consume media content (Ruth & Mendel, n.d.). Media literacy becomes a sensible response for user protection as new media increase in popularity and access. Heins and Cho (2002) contend that promotion of media literacy is "an essential part of basic education that is far preferable to censorship as a means of addressing concerns about popular culture's influence on youth".

Jamaica has been keeping pace with new media trends. For example, the percentage of people utilising the Internet in Jamaica moved from 30.45 in 2003 to 55.27 in 2007 (Dunn, 2008). Online social media sites, such as Facebook, are accessed by 683,720 Jamaicans, which is just about a quarter (23.8%) of the population (<http://www.internetworldstats.com/carib.htm>). It is important, therefore, that the Broadcasting Commission of Jamaica understands these trends and the public perception of its work as it seeks to develop policies and regulations in the interest of the public. Dunn (2008) aptly notes “the Broadcasting Commission must then consider the internal policy and operational changes which will be required in this ever-changing environment” (p. 16). As there are hardly any studies that explore public perception of regulators, this research is indeed timely and necessary.

The BCJ commissioned the Caribbean Institute of Media and Communication (CARIMAC), the University of the West Indies, Mona to conduct research to understand audience needs in relation to local electronic media; the actual output of Jamaica’s electronic media sector; the public perception of the Commission; and the implementation of its Children’s Code for Programming. This research was guided by the following specific questions:

- What is the output of the Jamaican electronic media sector?
- What types of TV programmes is the Jamaican population watching on local free-to-air and cable television stations, and the Internet?
- What types of radio programmes is the Jamaican population listening to on local stations and the Internet?
- What kinds of local television and radio programmes do Jamaicans want to see and hear?
- Are Jamaicans aware of the BCJ and its role?
- Do Jamaicans understand the BCJ’s role and functions?
- What do Jamaicans think of the Children’s Code for Programming?
- How do local media managers view the BCJ’s work?

Details on the background and objectives of this research can be seen in the Terms of Reference which appears in Appendix A.

METHODOLOGY

The research was based on a multi-method design, incorporating both quantitative and qualitative approaches. This design was deemed more effective than one with a single method approach, as the phenomena were best explored from a variety of perspectives to give more breadth, thus yielding a better understanding of the issues being studied (Creswell, 2003; Tashakorri & Teddlie, 2009).

Based on the Terms of Reference, the study's aim was to gather data on the following:

- audience needs in relation to the output of Jamaica's electronic media sector;
- the perception of the Broadcasting Commission vis-à-vis brand recognition, and perception of the work and activities of the Commission; and
- the Children's Code for Programming (excluding broadcasters) vis-à-vis rating, scheduling and provision of advisories.

The various research techniques used in the study included:

- a national quantitative survey (using both face-to-face and online data collection modes);
- a quantitative content analysis of programmes aired by the electronic media sector;
- focus group discussions with Jamaican media audience members; and
- semi-structured interviews with media managers.

Each of these techniques is discussed below.

Quantitative Methods

Survey

A national quantitative survey of Jamaican electronic media audiences was conducted to detect their needs in relation to the Jamaican electronic media sector; perception of the work and activities of the BCJ, and an assessment of the Children's Code for Programming. This survey

was conducted using multiple data collection modes: face-to-face and online. The survey instrument used can be seen in Appendix D.

Survey Sampling: For the face-to-face component, a multistage sampling design was done to yield a national sample of Jamaicans. The target sample size for the project was 1,500 respondents; 1,418 persons completed the face-to-face survey. At the first stage, the country was divided into four strata:

- the Kingston Metropolitan Area (KMA) - covering Kingston, St. Andrew and St. Catherine
- Parish Capitals/Major Towns;
- Rural Towns/Minor Towns; and
- Rural Areas/Residential settings.

In each of these four areas, a specific quota of the target sample size was surveyed. Six hundred (600) was the target sample size in the KMA; 270 in the parish capitals/major towns; 210 in rural towns and 420 in rural areas. At the next stage, the sample was stratified according to age groupings, gender, and socio-economic status. Respondents were selected until the quota in each of these demographic groups was met. With this technique, fieldworkers approached and informed potential respondents of the survey and administered the questionnaire after obtaining their verbal consent to participate. Respondents were selected in areas such as busy shopping malls or shopping centres. An illustration of this design is shown in Appendix B.

This survey was conducted during mid-October to mid-December 2011. In addition to the face-to-face survey, an online survey was also carried out between mid-October 2011 and mid-March 2012. A link to the survey was promoted on BCJ's website and also on the popular social networking sites Facebook and Twitter. With the online survey method, an incentive (\$100 phone credit) was offered to increase survey participation. The online version of the survey was attempted by 808 individuals with 647 completing the survey. In total, 2,065

respondents (1,418 face-to-face respondents and 647 online respondents) completed the quantitative survey.

A fairly equal number of men and women participated in the study (53.8% females and 46.2% males). The majority of the sample (52.0%) fell within the age range 16 to 29 years. The average age of the sample was 32 years (standard deviation = +/- 13 years). The ages represented in the sample ranged from 16 years to 89 years; the median age was 28 years and the modal age was 21. Approximately two-thirds (59.4%) of the sample was employed, with 49.4% completing secondary school as their highest level of education (see breakdown of demographics in Table Q1-5 in Appendix E).

Content Analysis

A quantitative content analysis was conducted using a sample of the programmes broadcast by the electronic media sector between November 17 and 29, 2011. The programming aired for a seven-day week (Sunday to Saturday) from select media houses and cable service providers was recorded. A descriptive content analysis was undertaken to reveal the various programming genres in Jamaica's electronic media sector. The code book used for the content analysis can be seen in Appendix D.

Content Analysis Sampling: A composite week sample design was used to create a week from a selected month. Typically, in this approach, a sample of one Monday is drawn at random from all Mondays in the month, one Tuesday from all Tuesdays and so on. For this study, November was the selected month and the composite week comprised alternate days in the last two weeks of that month. The dates selected were:

Thursday, November 17, 2011

Saturday, November 19, 2011

Monday, November 21, 2011

Wednesday, November 23, 2011

Friday, November 25, 2011

Sunday, November 27, 2011

Tuesday, November 29, 2011

A sample of television and radio stations as well as local cable channels, totalling nine media entities, was randomly selected from a list of all television and radio stations and local cable channels and alternate three-hour time slots of programming within each day were recorded from each entity for content analysis. The schedule of content recorded during the composite week can be seen in Appendix B.

Qualitative Methods

Focus Group

Focus group discussions were held on completion of the quantitative survey with specific demographic groupings of Jamaican audiences to glean qualitative explanations that expanded on the findings of the quantitative data. Ten focus groups were conducted in urban areas of five parishes across Jamaica. Members of the groups were asked to discuss their views on Jamaica's electronic media sector and media regulation issues. (See an example of the focus group moderator's guide in Appendix F).

Focus Group Sampling: Focus group participants were conveniently or purposively selected for participation. Some participants had completed the quantitative survey and indicated that they would participate in the follow-up focus groups. Additional persons were recruited to ensure that each focus group had a sufficient number of participants. The groups comprised 4 to 14 individuals which included parents, persons with disabilities and adolescents.

Semi-structured Interview

The interviews were conducted to glean descriptive, contextual information from the perspective of key participants in the electronic media sector – media and production managers. These interviews sought to explore viewpoints of members of the electronic media industry on matters of regulation, perceptions of audience preference, and the robustness of the sector, and as such contributed some depth to the quantitative data. This approach was used as opposed to a focus group to allow the participants to speak freely about their perceptions and interactions with the BCJ without fearing that their information would be shared with competitors, as would have been the case in a focus group setting. The interviews were conducted face-to-face using an interview guide (see Appendix F).

Semi-structured Interview Sampling: These interviews were held with managers and executives of the electronic media sector to ascertain their perception of the work of the Commission. The interviews were conducted with approximately two to three participants in each of the following sectors - radio, free-to-air television, subscriber and mobile television. In total, fifteen interviews were conducted with managers of radio broadcast entities, free-to-air television, media groups of companies, telecommunications providers, subscription television service providers.

Ethical Consideration

Verbal permission or the signing of an informed consent form (see Appendix C) was required from all participants to ensure that ethical standards and guidelines were followed. Participants were free to withdraw at any time, without penalty. The study was reviewed and approved by the UWI Ethics Committee. (See approval letter in Appendix C).

Limitations

- Technical challenges with the content analysis meant that some selected programme slots were not recorded. Other slots were recorded to replace those that were not

recorded. Also, the poor technical quality of some recordings meant that they could not be coded. One station encountered broadcast challenges during several of the slots selected for our recording and it was eventually excluded from the sample. As such the results of the content analysis should be seen as indicative of the output of the electronic media sector. A census of a day's programming for all stations within the electronic media sector would produce a stronger measure of the sector output.

- A consistent tracking mechanism must be developed to assess the ratio of local to foreign programming and the implementation of the programming code. The current study barely uncovers these issues. For the BCJ to respond effectively to the needs of the electronic media sector, it must be able to ascertain what is happening on a regular basis in a systematic way. A regularly scheduled annual or biennial inventory of media programming could help the BCJ to track the trends in the local electronic media sector and assess the effectiveness of its role as a regulator.
- Media managers were often busy and unable to commit to appointments for interviews which resulted in delays in completing the qualitative component of the study. It took up to six months to plan interviews at times that were convenient to the managers.
- The completion of the online survey was initially slow, despite attempts to promote the survey on the BCJ's website and on social media. Eventually, the use of an incentive (\$100 phone credit for completion) motivated respondents to complete the questionnaire, which was considered relatively long with just over 70 questions.
- Parts of the survey sample, in particular the online sample, were based on a convenience or "snowball" sampling technique and therefore the results cannot be generalized.
- Overall, the multi-method design which included four data collection techniques required more time for the project to be completed than was originally planned. The initial three-month completion time-frame proved unrealistic, given some of the foregoing challenges.

FINDINGS AND ANALYSIS

The reporting of the findings is guided by the research questions that are repeated here for convenience and ease of reference.

- What is the output of the Jamaican electronic media sector?
- What types of TV programmes is the Jamaican population watching on local free-to-air and cable television stations, and the Internet?
- What types of radio programmes is the Jamaican population listening to on local stations and the Internet?
- What kinds of local television and radio programmes do Jamaicans want to see and hear?
- Are Jamaicans aware of the BCJ and its role?
- Do Jamaicans understand the BCJ's role and functions?
- What do Jamaicans think of the Children's Code for Programming?
- How do local media managers view the BCJ's work?

RQ1: What is the output of the Jamaican electronic media sector?

Output of the Free-to-air Television Sector

A wide range of programming was identified in the sample from factual programmes, including news, current affairs and sports, to entertainment programming in the form of movies lifestyle, reality and game shows.

The programmes represent a mix of local and international programming.

Entertainment programming included a local soap opera, *The Blackburns*, as well as local reality programmes and games shows such as *All Together Sing* and *Junior School's Challenge Quiz*. Local

news and current affairs programmes included news and programmes such as *All Angles*, *Direct* and *Live at Seven*.

Country of Origin

The research found that more than half (60.1%) of the programmes in the free-to-air television sample originated in Jamaica. Programmes produced in the USA accounted for the second largest share (32.3%) of content aired and Great Britain the third largest with 4.4%. Content also originated in Africa (1.3%), Germany (1.3%) and Asia (0.6%). The large percentage of programmes that originated in Jamaica was not surprising bearing in mind that news and sport were included in this sample. Increasingly also, free-to-air television stations are producing more reality shows. This would also account for the high percentage of local programming.

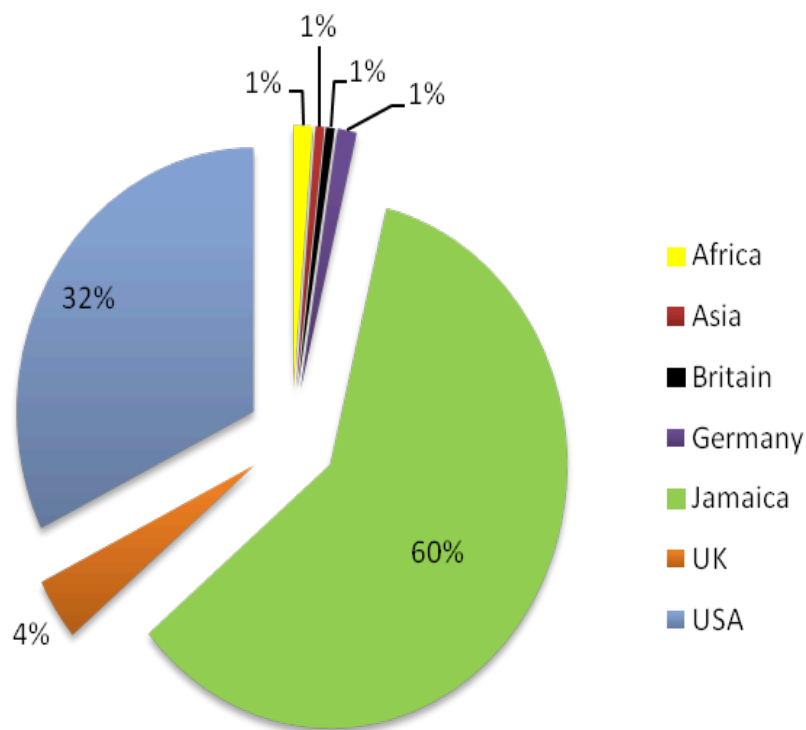


Figure 1: Frequency distribution of free-to-air television programme content by country of production

Programme Content

Local and international news and current affairs, government bulletins, lifestyle, sport, documentary and finance programmes accounted for almost 50% (49.6%) of programme content. Another 48.7% of the programmes in the sample were of an entertainment nature including movies, games shows and reality dramas, soap operas, lifestyle, cartoons and dramas. When these figures are further disaggregated, it was found that local and international news as well as current affairs programmes comprise 22% of the content.

When only local current affairs and news programmes were analysed, it was found these segments comprised just under 18% (17.7%). Next to news and current affairs, advertisements, infomercials and death announcements made up almost 14% (13.9%) of content.

Movies represented 13.3% of programmes, 10.1% of programmes were lifestyle and 8.2% of programmes were dramas. All other types of programmes accounted for less than 5%, with international news at 4.4%, religious programmes at 4.4%, cartoons 3.8%, sitcoms, 3.8%, reality and game shows 3.8%, music videos 3.2%, government bulletins 3.2%, soap operas 2.5%, other

2.5%, finance 1.9% and sports

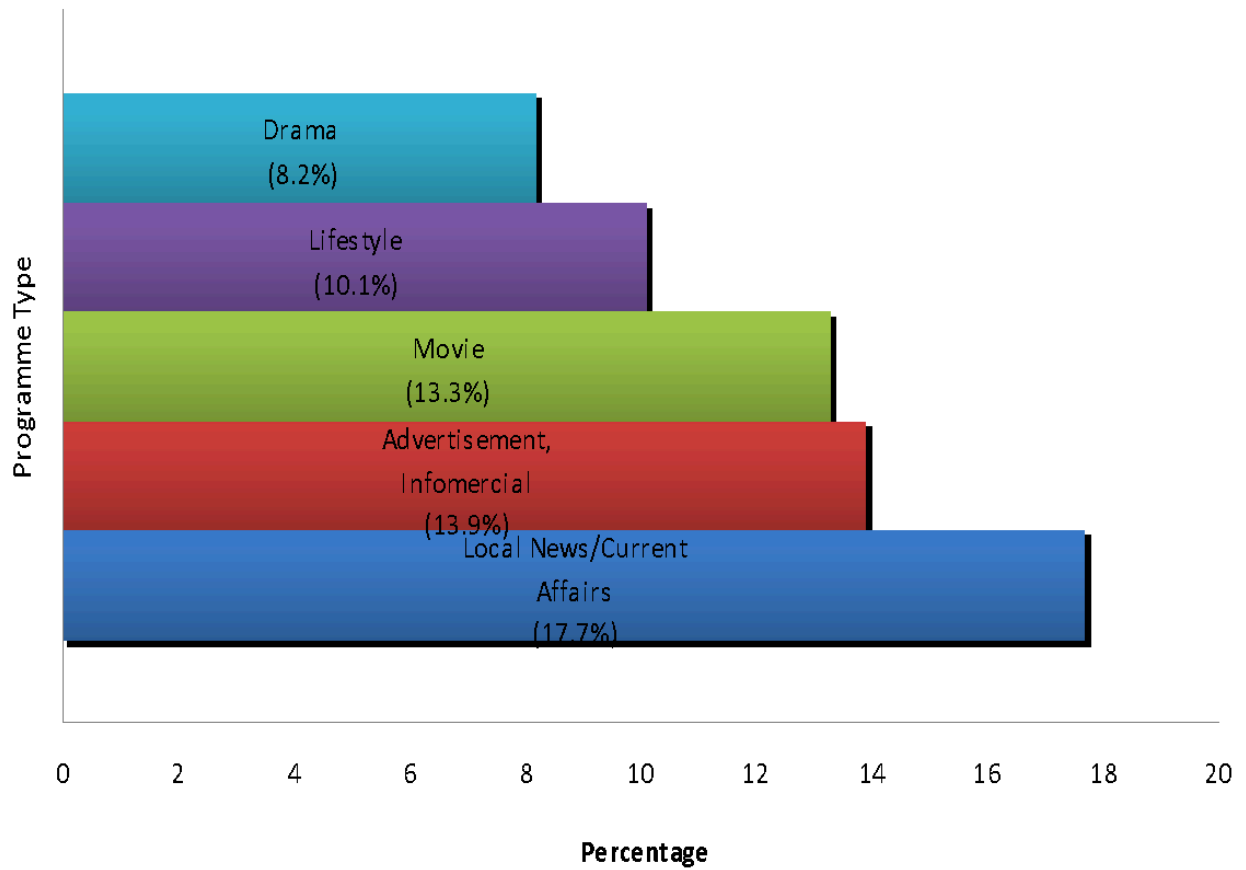


Figure 2: Top five programme genres aired on free-to-air television

Code of Programming and Advisories

Seventy-two percent (72%) of the programmes coded had no rating regarding violence; 9.1% was rated as having “no violence”, 7% as having “mild violence” and 4.2% as having “medium-level violence”, 4.2% “graphic violence” and 3.5% “excessive violence”. These percentages are not surprising since local and international news content are not normally rated.

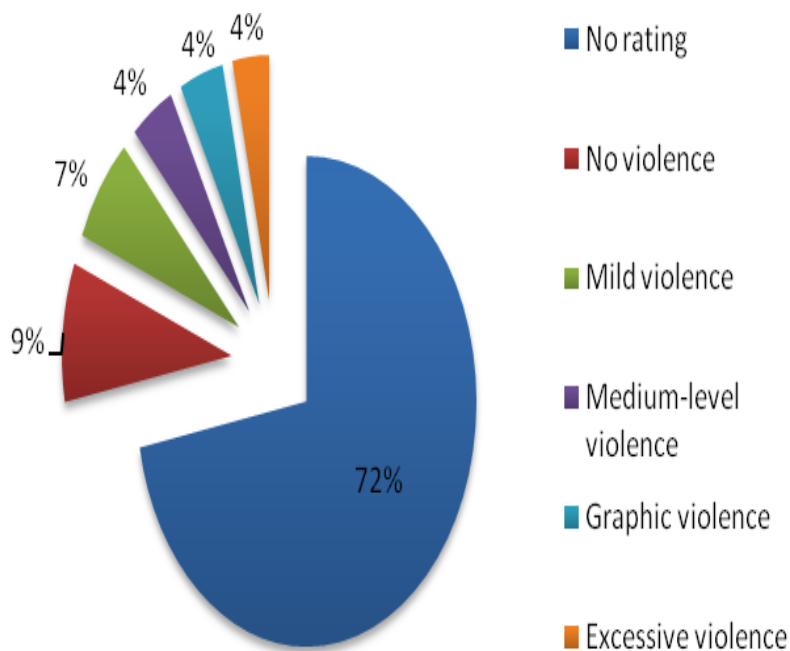


Figure 3: Frequency distribution of the “violence” rating of programmes on free-to-air television

In the area of rating for sexual content, 72.9% of the programmes had no rating regarding sexual content, 12.3% were rated as having “no sexual content”, 11% were rated as having “mild sexual content”, 3.2% were rated as containing “graphic sexual content” and 0.6% was rated as containing “excessive sexual content”.

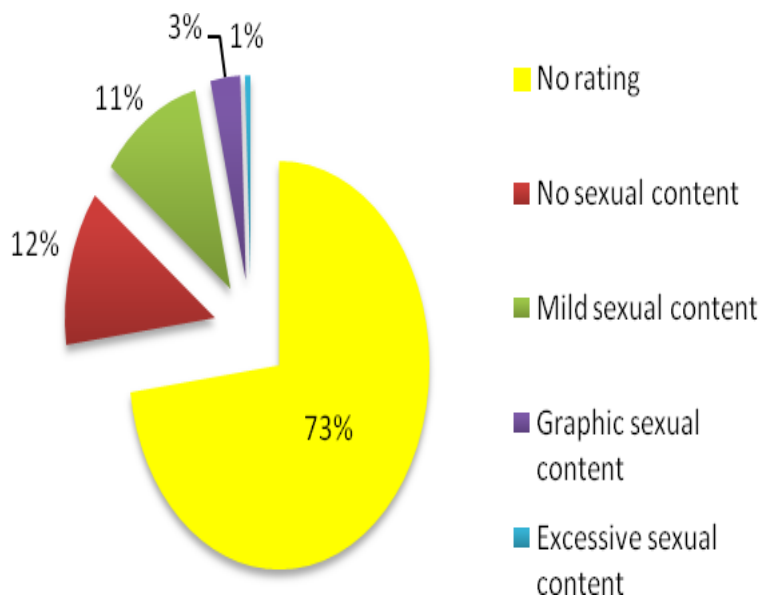


Figure 4: Frequency distribution of “sexual content” rating of programmes on free-to-air television

Seventy-one percent (71%) of programmes received no rating in the area of language content. Seventeen percent (17.4%) were rated as containing “no offensive language”, 9.7% were rated as having “mildly offensive language” and 1.9% as having “graphic language”.

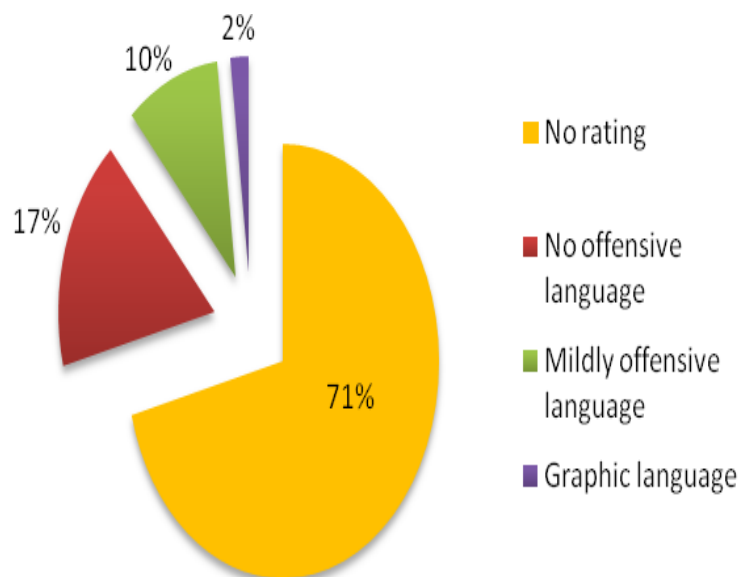


Figure 5: Frequency distribution of “language” rating of programmes on free-to-air television

Seventy-six percent (76.3%) of the programmes had no advisories and 23.7% had advisories. In this category the research found that of the programmes that had advisories, the most frequently used type of advisory was a combination of written and oral material at 54.1%. Forty-one percent (40.5%) had only a written advisory and 5.4% had only an oral advisory.

Advisories were most frequently placed at the beginning of the programmes. This was the case with 94.3% of programmes that had advisories. Six percent (5.7%) of the programmes had advisories aired during the programme.

Of the programmes in the sample, 61.8% did not have the overall rating stated and 38.2% had the overall rating stated. In 70.8% of programmes in the sample the level of each rated content was not stated, some 29.2% of the programmes had each level of the content stated. Just under seventy-two percent (71.9%) of the programmes did not have a full description of the advisory stated and 28.1% had a full description.

Output of the Local Cable Channels

Three cable channels were included in the sample. Two are music orientated cable stations and the other a sports cable station. Cable3 represented the most content at 44.3% of programmes, 37.7% of programmes came from Cable2 and 18% of programmes were from Cable1.

Programme Content

The programmes broadcast included music video shows, such as *Pre Music Video*, *Request Text*, *New Music Block* and *The Best of Hype*, sports programmes such as *Sportszone*, commentary and broadcasts of sporting events and news and current affairs programmes such as *Entertainment News*, *Eweekly* and *News Update*. All the programmes in the sample were produced in Jamaica.

The predominant type of content was music and music video programmes at 58.2%. Just under sixteen percent (15.6%) of programmes were advertisements and infomercials, 14.8% broadcasts of sporting events and sports programmes, and 11.5% of programmes were news and current affairs.

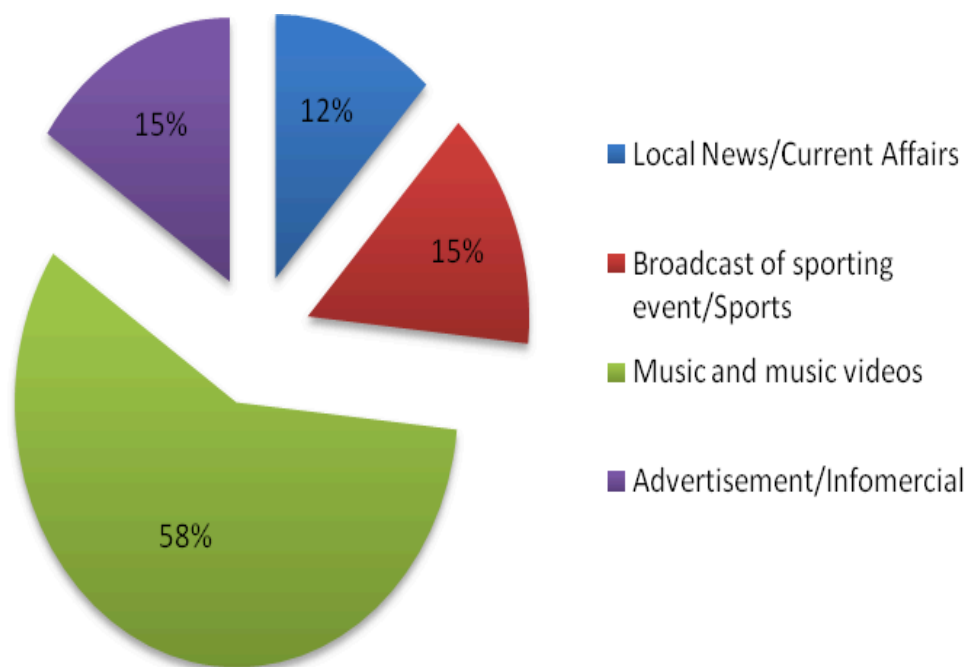


Figure 6: Main types of programme genres on local cable channels

Code of Programming and Advisories

None of the programmes in the sample was rated for violence, sex or offensive language.

Almost all programmes had no advisories at 98.9% and 1.1% of programmes had advisories. All the programme advisories were oral and were all placed during the programme.

Output of the Radio Sector

The sample included programmes devoted to music, talk shows, like *Hotline*, *Independent Talk*, *Both Sides of the Story*, news shows like *News Headlines*, help and advice shows such as *Legal Corner* and *Dear Pastor*, advertisements, live broadcasts of special events such as *The Big Picture Launch of the Child Development Agency*, *Smiles Recovery Centre* and the *Big Picture from Denbigh*,

government bulletins such as *GOJ Update* and religious programmes like *Morning Devotion*. All the programmes were produced in Jamaica.

Programme Content

The top three programme types on radio were news and current affairs (23.6%), talk shows (23.1%), and music (19.8%). Advertisements accounted for 13.2%, other 15.9%, magazine 3.8% and 0.5% were programmes consisting of broadcasts of sporting events. The 15.9% other category included content regarding obituaries, weather updates, vox pops or brief interviews with members of the public, and inspirational or religious programming (such as morning devotions).

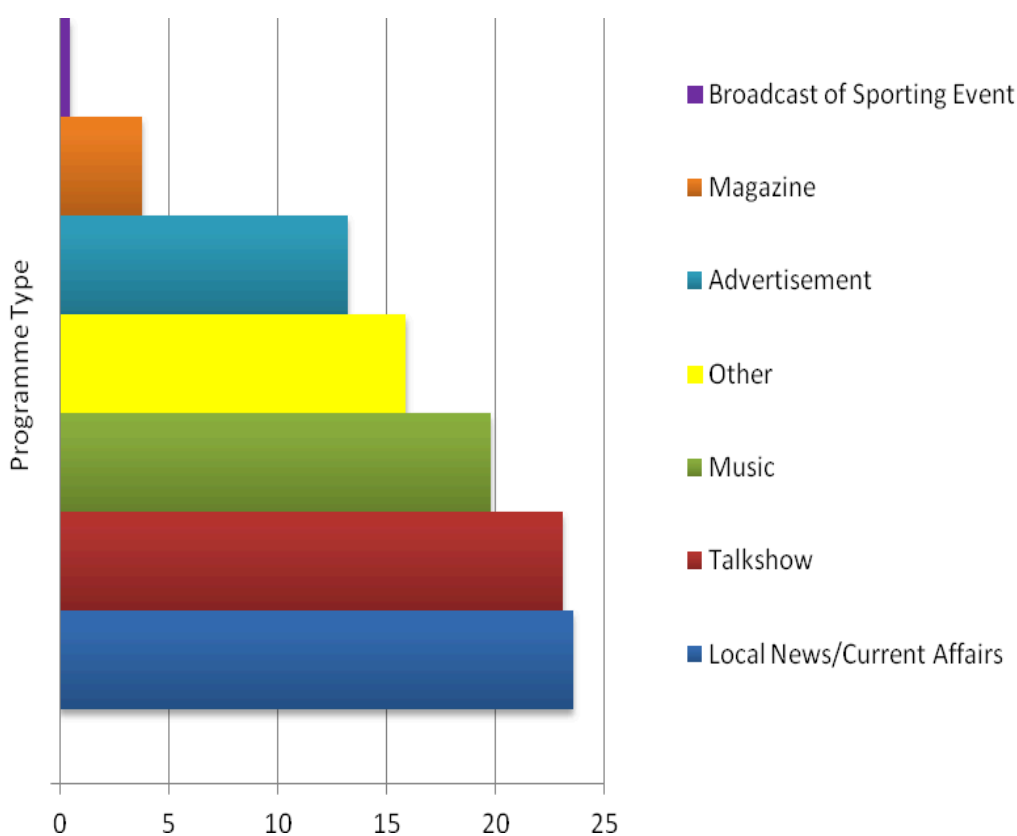


Figure 7: Types of programmes broadcast on local radio

Code of Programming and Advisories

Eighty-two percent (82.2%) of the programmes had no rating regarding violence, 17.8% had a rating indicating the programme did not contain violence.

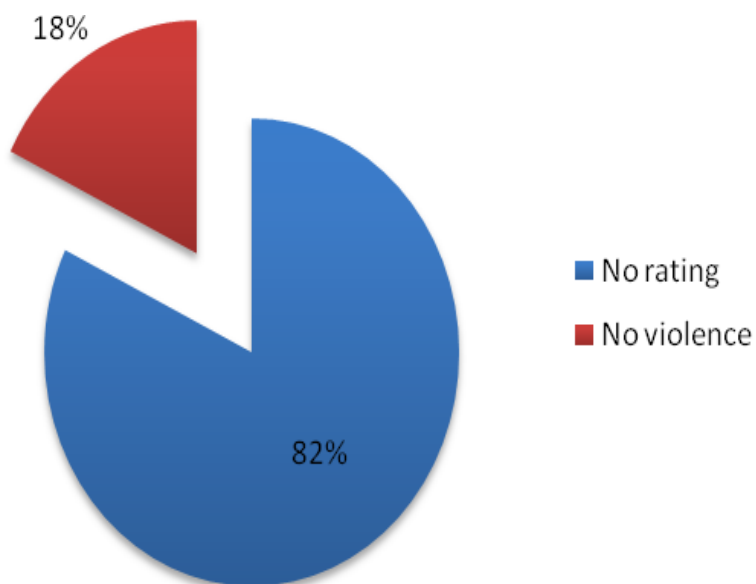


Figure 8: Frequency distribution of the “violence” rating of programmes on local radio

Eighty-one percent (81.1%) of the programmes had no rating regarding sexual content, 17.2% were rated as having no sexual content, 0.6% was rated as having mild sexual content and 1.1% was rated as having graphic sexual content.

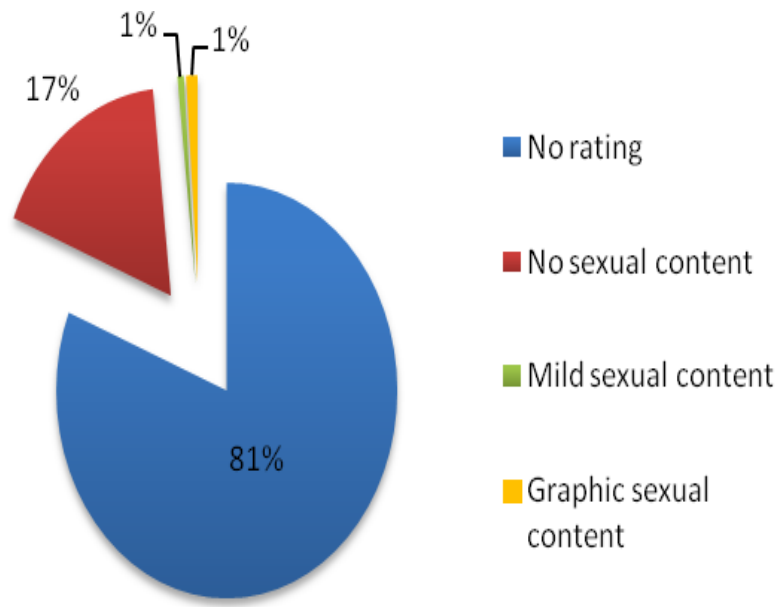


Figure 9: Frequency distribution of "sexual content" rating of programmes on local radio

Eighty-one percent (81.1%) of programmes had no rating regarding offensive language, 18.9% were rated as containing no offensive language.

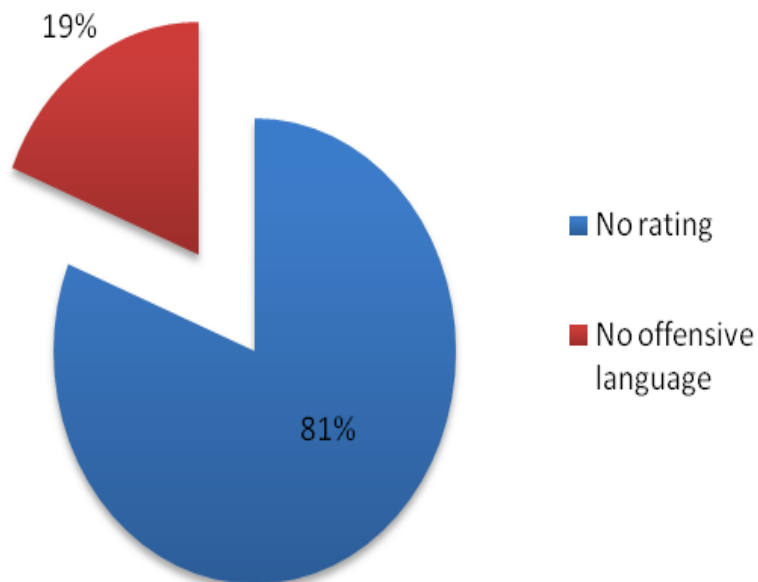


Figure 10: Frequency distribution of "language" rating of programmes on local radio

Almost ninety-nine percent (98.9%) of programmes had no advisories, 1.1% of programmes had advisories. The majority (71.4%) of programme advisories was live announcement advisories and 28.6% had pre-recorded advisories.

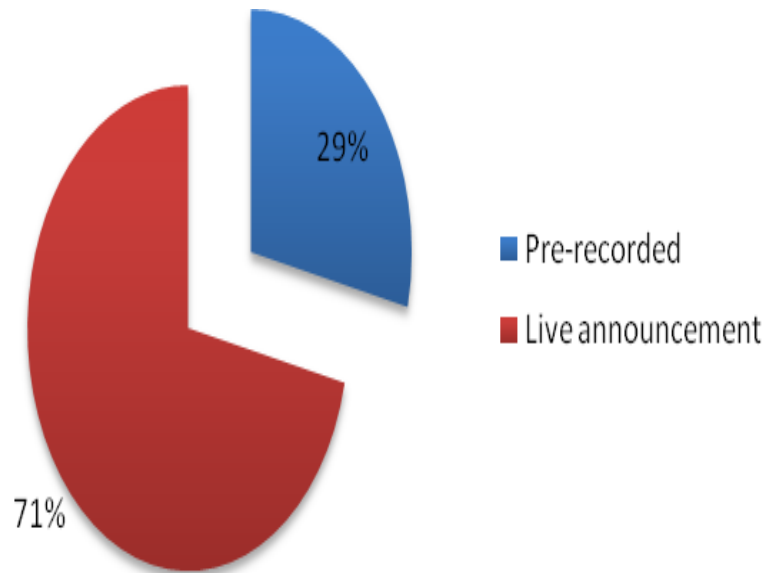


Figure 11: Frequency distribution of the type of advisory aired on local radio

Fifty percent (50%) of the programmes had advisories at the beginning and 50% had advisories within the programme. None of the advisories stated the overall rating, the level of each rated content or a full description of rated content.

RQ2: What types of TV programmes is the Jamaican population watching on local free-to-air, cable television stations, and the Internet?

In answering this question, a description of the general local television (both local cable and free-to-air channels) consumption habits of Jamaicans is given. This is followed by a discussion of what survey respondents reported they were watching on local free-to-air, cable television stations, and the Internet.

General Local Television Media Consumption Habits

Survey respondents reported that they spent, on average, 8 hours (standard deviation = +/- 9 hours) watching local television on a typical weekday (Monday to Friday). The number of hours spent watching television during the week, as reported by respondents, ranged from 1 hour to 110 hours. The upper limit of 110 hours was reported by one respondent and this suggested that that person may be watching television for most of the day during the week. As extreme values affect the average viewing time reported earlier (8 hours), the median and modal values may be a more realistic measure of central tendency in this case: therefore, the median time spent watching local television during the week was 5 hours; the modal time was 2 hours.

On the weekends (Saturdays and Sundays), respondents said that they watched, on average, 6 hours (standard deviation = +/- 5 hours). The number of hours spent watching television on the weekends ranged from 1 hour to 40 hours. The median time spent watching local television on weekends was 4 hours and the modal time was 2 hours.

During the week, the time of day during which local television was normally watched was early evening, 6pm to 9pm, as 53.6% of interviewees reported that they watched local television during that time. On weekends, the same timeslot was also normally watched with 43.8% respondents reporting that they watched television at that time on weekends (See tables Q8 and Q9 in Appendix E).

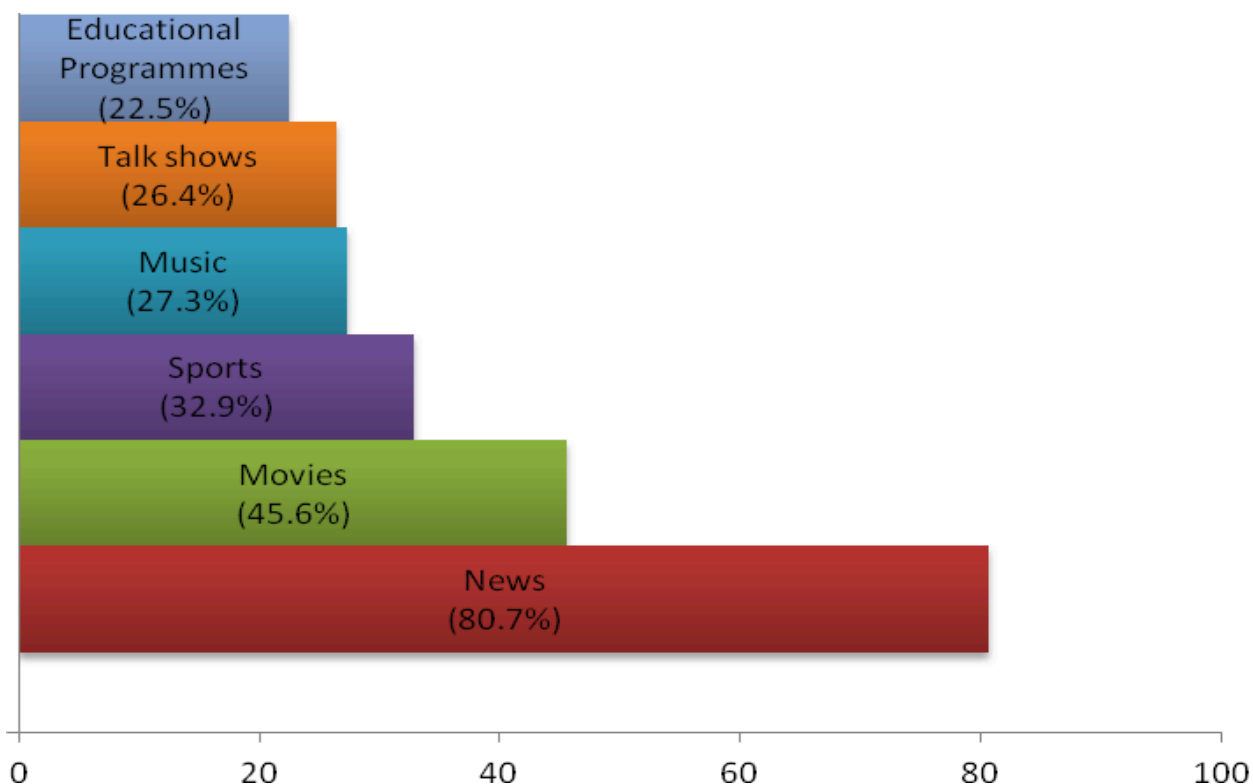


Figure 12: Top six programmes that respondents said they normally watched on local television

The two highest reported categories watched on local television by survey participants were news (80.7%) and movies (45.6%) (see Table Q10 in Appendix E). In addition to the categories listed respondents added that they watched comedies, reality programmes, entertainment shows and sitcoms. In this regard, *Ity and Fancy Cat*, *Digicel Rising Stars* and *All Together Sing* were singled out as the most popular programmes. Other responses included *Schools' Challenge Quiz*, *Cash Pot*, documentaries and current affairs programmes such as *All Angles*. The current affairs show *Live at 7* was also named as a popular programme choice. The focus groups confirmed the interest in local programmes (see details of focus report in Appendix G). Some respondents in the survey had no preference as they noted that they watched “anything else that comes on,” while others said they “don’t watch television”.

When not watching television, the largest number of respondents (43.7%) noted they were most likely to get their information and entertainment from laptops and desktop computers with

Internet access. Others received information and entertainment from a cell phone (30.1%) or smart device, such as smart phones or tablets (19.2%) (see Table Q11 in Appendix E for details). Radio was also listed, followed by books, cable television and the newspaper as sources of information and entertainment. Respondents also mentioned using CD and DVD players as well as playing video games as other sources of entertainment.

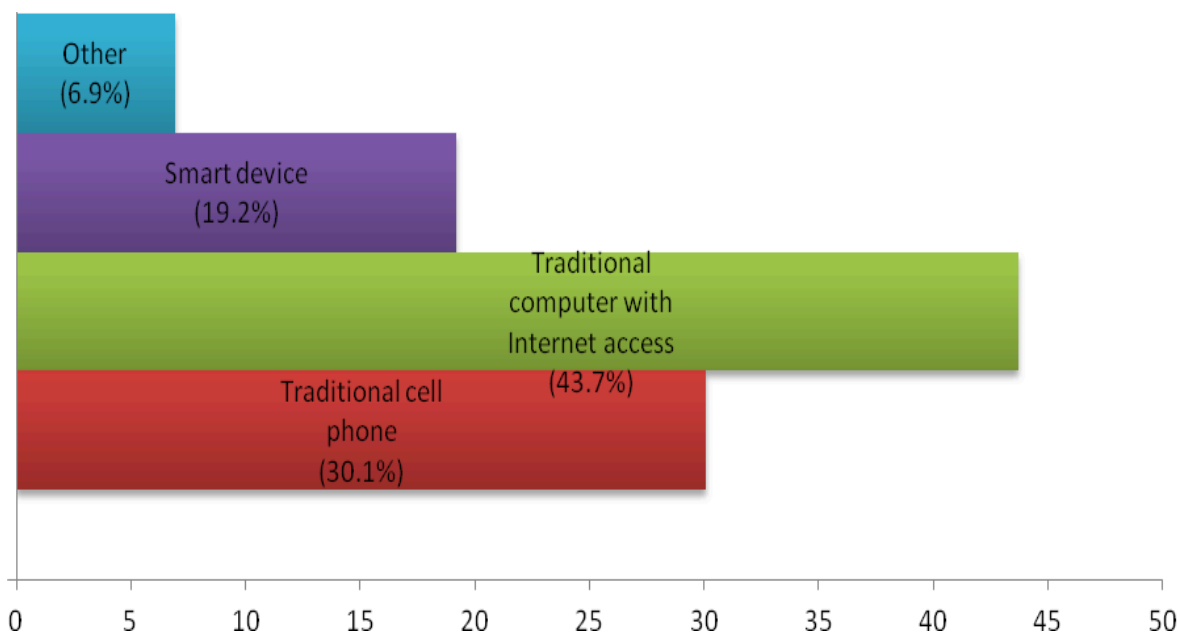


Figure 13: Electronic medium from which respondents were most likely to get information and entertainment when they were not watching television

The most watched local television station is TV1. Seventy-nine percent (79.1%) of respondents identified this station as the one they watched most during a typical week (see table Q12 in Appendix). TV1's popularity may be as a result of the attraction to local programmes such as *Schools' Challenge Quiz*, *Hill and Gully Ride* and *A Graders* which focus group participants said they found enjoyable. (See details of focus group report in Appendix G).

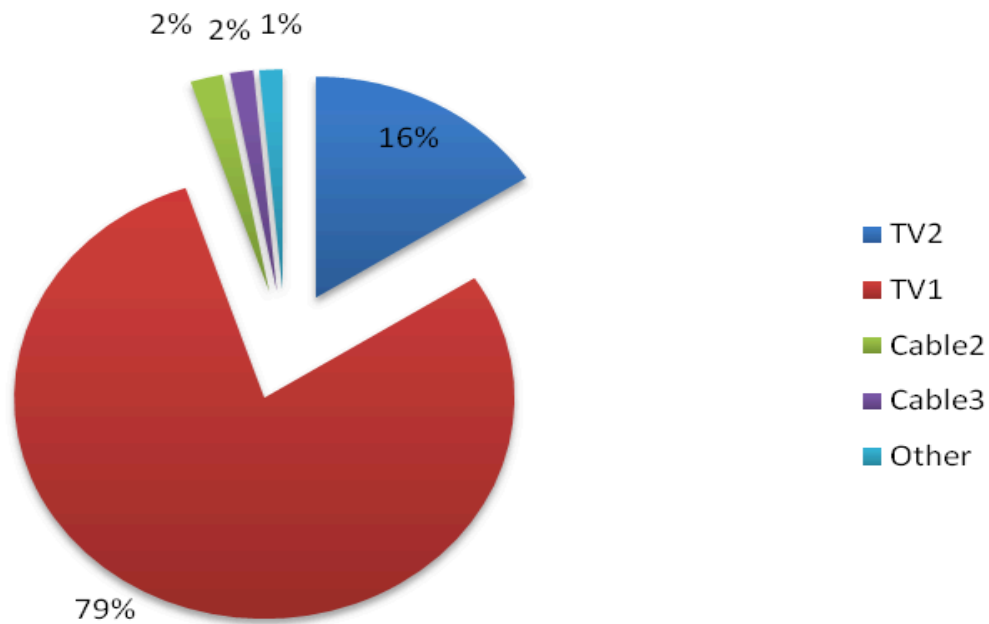


Figure 14: Local television stations respondents watched most during a typical week

Just under half of the sample (48.4%) stated that they had cable television (see Table Q13 in Appendix E). The most commonly stated cable provider was Flow.

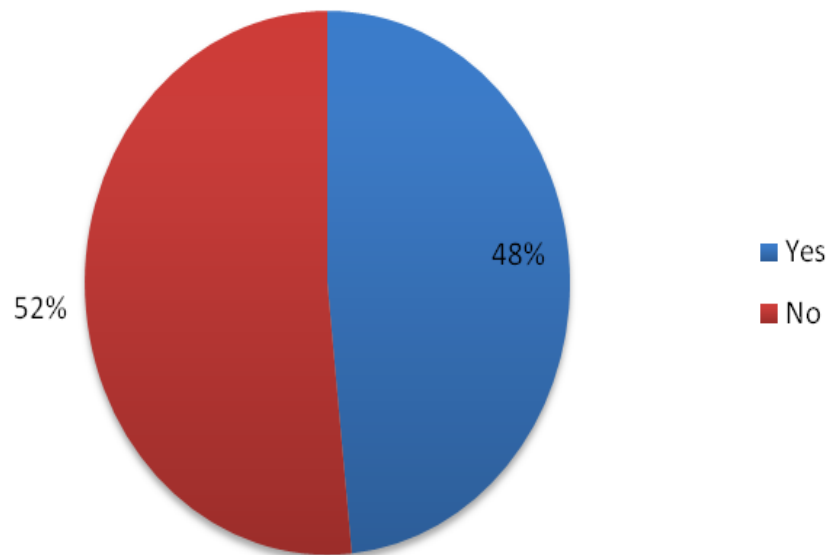


Figure 15: Frequency distribution of responses to the question "Do you have cable?"

Less than a third of the sample (26.5%) felt that the types of channels offered on cable television, influenced their choice of cable provider. For these respondents, the variety of programme packages offered by a cable company and the ability to choose widely were important. The kind of packages which cable operators offered also played a role in the choice of provider. Others simply stated that their choice was based on whether or not they received Internet and telephone service along with cable television. Both survey respondents and focus group participants revealed that the expense associated with accessing cable television was a determining factor for choosing a cable provider. Other survey respondents said the diverse consumption needs of their families (e.g. children) influenced the selection of cable provider.

Of note, was that Flow was named several times as the most suitable cable provider, based on its offerings. Some of the comments about the company were: “it offers a good and dynamic package”, “with Flow...you get almost any channel and you have telephone and Internet access.”

The top three types of programmes that respondents liked to watch on cable were sports (81.3%), movies (42.6%) and news (24.3%), that is across both local and foreign channels (see Table Q17 in Appendix E). When asked to specify which other programmes they liked to watch on cable channels, the range of responses included cartoons, comedy, drama, local plays, investigative shows, horror movies and African movies.

A majority (63.1%) stated that they were satisfied with the kinds of local television programmes currently offered on free-to-air television (see Table Q18 in Appendix E). For those who were not satisfied, music (7.6%) and talk shows (5.4%) were two commonly cited types of local television programmes that the respondents wanted to watch (see Table Q19 in Appendix E).

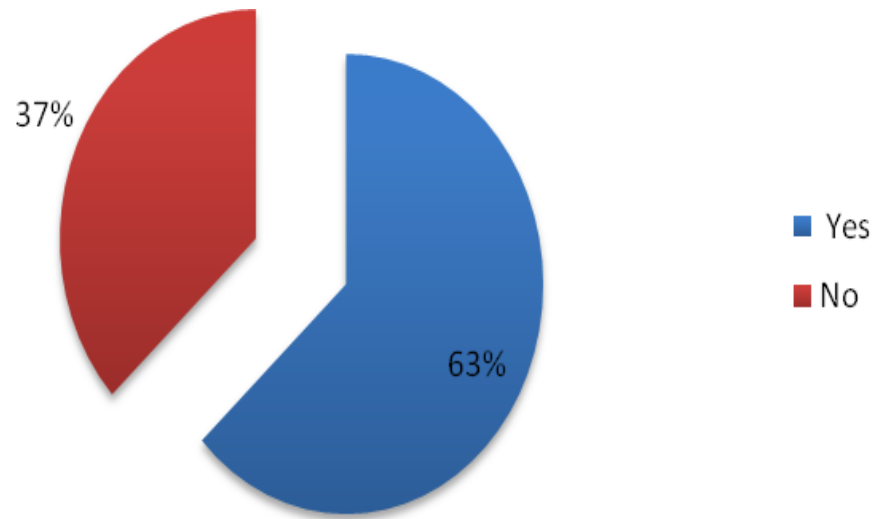


Figure 16: Respondents' satisfaction with the kinds of local television programmes currently offered on free-to-air TV

At the top of the list of the other programmes to watch on local television were documentaries, education, local shows or productions, movies (including Jamaican movies), sitcoms, comedies, reality TV, cultural, religious, entertainment, community and children programmes. Talk shows, adult shows, cartoons, food/cooking, technology and science programmes, and those which catered to teens, were also noted among the responses.

Most respondents (65.3%) were satisfied with the balance between local and foreign programmes on free-to-air television. A similar figure (71%) was also satisfied with the kinds of television programmes currently offered by local cable television channels. For those who were not satisfied, movies (7.0%), music (3.4%) and educational programmes (3.5%) were given as the kinds of programmes that they wanted to watch on cable (see Table Q22 in Appendix E).

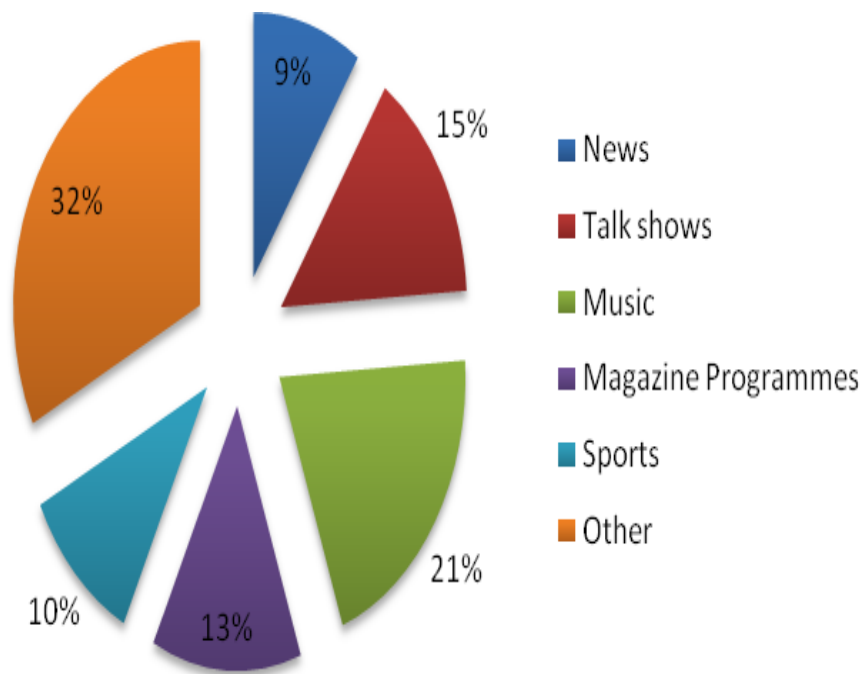


Figure 17: Kinds of local television programmes respondents wanted to watch

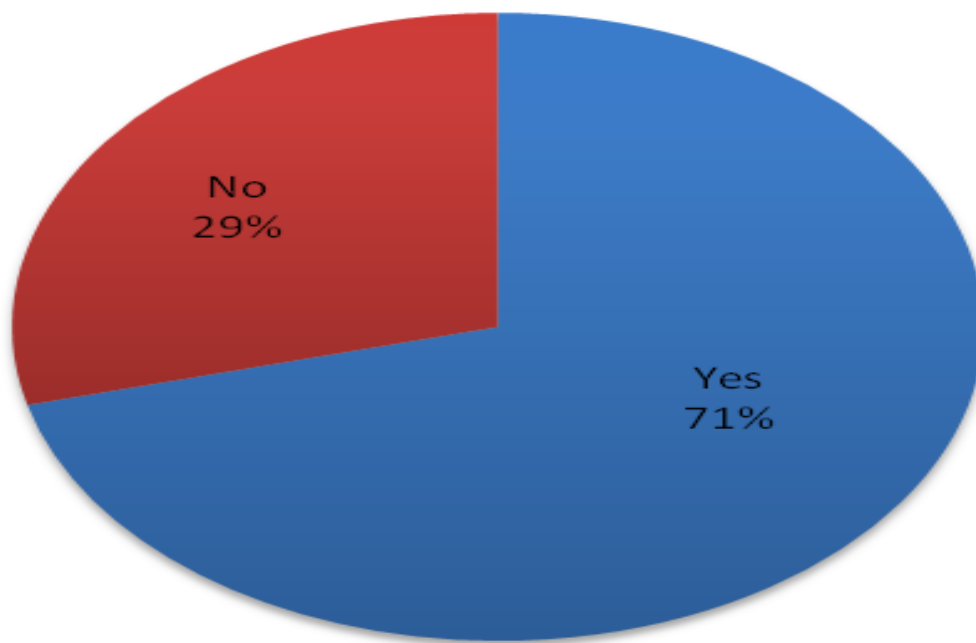


Figure 18: Respondents' satisfaction with the balance between local and foreign programmes on free-to-air TV

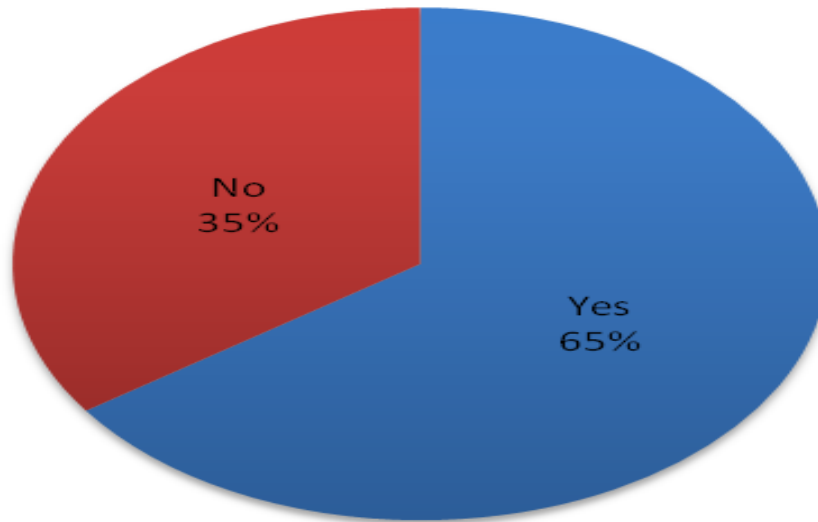


Figure 19: Respondents' satisfaction with the kinds of television programmes currently offered by local cable TV channels

Sitcoms appeared as the most popular “other” answer among respondents when asked what kinds of local television programmes they wanted to watch. Other programmes listed were movies, documentaries, those geared toward children, reality programmes, sports, gaming shows such as *Deal or No Deal*, and adult movies (pornography).

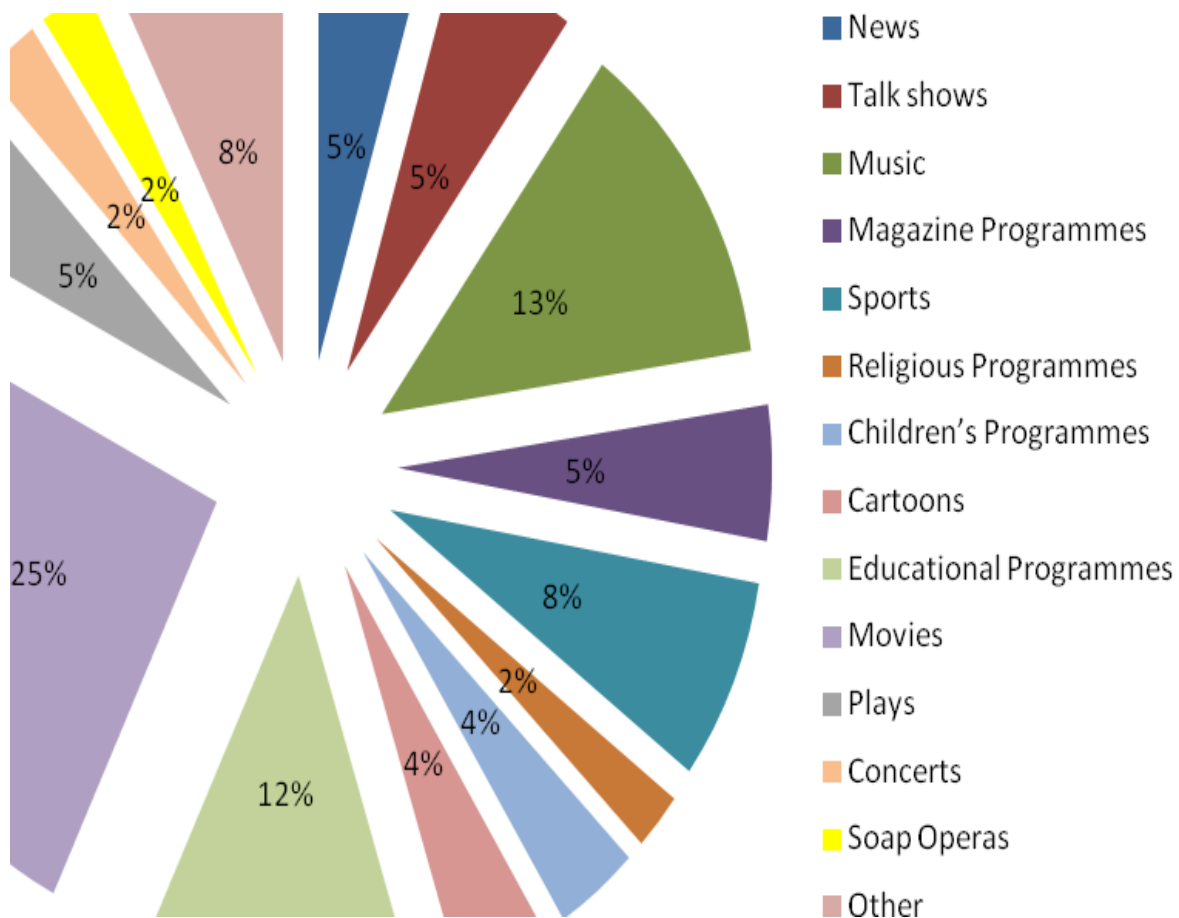


Figure 20: Types of programmes respondents liked to watch on cable channels

General New Media Consumption Habits

A fairly large majority of the survey subjects owned new media technologies. Ninety-five percent (95.2%) owned a cellular phone while another 4.8% had access to one. Fifty-seven percent (57.3%) owned a desktop computer with the remaining 42.7% having access to one. Seventy-four percent (74.4%) owned a laptop. Seventy-eight percent (77.5%) owned a smart device (tablet computer such as iPad or smart phone such as BlackBerry or iPhone]. (See Tables Q31a to Q31d in Appendix E). About 13% of the sample indicated that they owned all four types of new media devices: cell phone, desktop, laptop and a smart device.

More than half the sample (71.9%) confirmed that they used these relatively new devices while listening to radio or watching a television set. (See Table Q32 in Appendix E). Of those who did not use these devices while watching television or listening to radio, about a third (30.3%) acknowledged that their use of the device was a substitute for watching television or listening to radio.

Seventy-four percent (73.7%) of the sample reported having access to Internet (see Table Q34 in Appendix E). Of that percentage, 51.9% stated that they currently used the Internet at home. Other typical places of usage included work (17.6%) and school (13.7%) (see Table Q35 in Appendix E). As the survey was administered both face-to-face and online, it must be noted that more online respondents reported having access to Internet than face-to-face respondents. Specifically, 95.2% of online respondents stated that they had Internet access while 63.4% of the face-to-face respondents reported having Internet access.

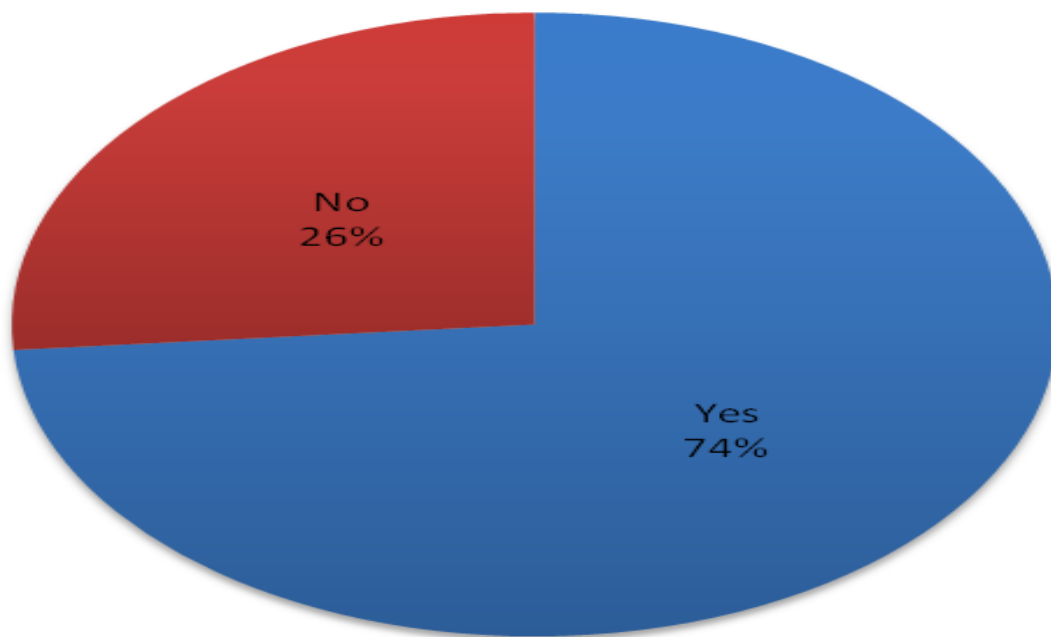


Figure 21: Respondents who had Internet access

A smaller number of respondents (20.4%) watched local television programmes on the Internet when compared to those who watched foreign television programmes on the Internet (40.8%) (see Tables Q36 and Q38 in Appendix E). Types of local television programmes watched on the Internet included:

- *All Angles*
- *Prime Time News Bite of the Week*
- *Dancing Dynamites*
- *Entertainment Report*
- *Ity and Fancy Cat Show*
- *Your Issues Live*
- *Oliver*
- *Prime Time News*
- *Religious Hard Talk*
- *TVJ Sports commentary*
- *Teacher's Pet*
- *All Together Sing*
- *CVM TV's News Watch*
- *Digicel Rising Stars*
- *Eye on Sports*
- *Magnum King and Queen of Dancehall*
- *Junior Schools' Challenge Quiz*
- *On Stage*
- *Profile with Ian Boyne*
- *Smile Jamaica*
- *Schools' Challenge Quiz*
- *Wealth Magazine Show*

Examples of foreign television programmes viewed on the Internet included:

- *America's Best Dance Group*
- *American Idol*
- *BBC News*
- *Big Bang Theory*
- *Dexter*
- *Everybody Hates Chris*
- *Friends*
- *Grey's Anatomy*
- *House*
- *Japanese Anime*
- *Jersey Shore*
- *L Word*
- *America's Next Top Model*
- *Bad Girls Club*
- *106 & Park*
- *Cake Boss*
- *Ellen DeGeneres*
- *Family Guy*
- *Gossip Girl*
- *Home Improvement*
- *Jackass*
- *Jerry Springer*
- *Keeping Up with the Kardashians*
- *Lost*

- *NYPB, Judge Joe Law and Order*
- *Pornography*
- *Two and a Half Men*
- *True Blood*
- *Will & Grace*
- *Oprah*
- *The Game*
- *Tia & Tamara Show*
- *Vampire Diaries*
- *X- Factor*

While the majority of respondents (78.4%; see Table Q40 in Appendix E) did not prefer watching TV on the Internet to watching over-the-air, the 21.6% who had such a preference chose to do so because of ease of access, the diversity in the programming, fewer commercial breaks, and the ability to watch at one's convenience. Respondents said that the ability to watch TV programmes online, anywhere, anytime, was the main reason they preferred watching on the Internet. They also indicated that, not only were they able to choose their own content but they were able to incorporate it within their schedules, at their convenience.

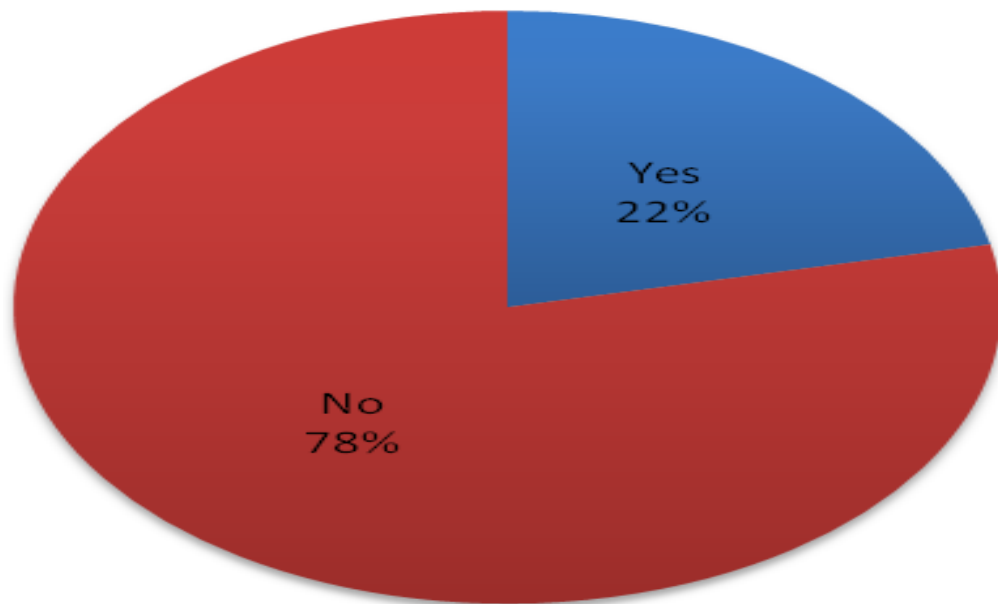


Figure 22: Responses to the question "Do you prefer Internet TV to over-the-air TV?"

Some general phrases respondents used to describe their preference for Internet TV, was because it was “uncensored”, “there is less commercial breaks,” and it provided “more options,” “variety” and “diversity”.

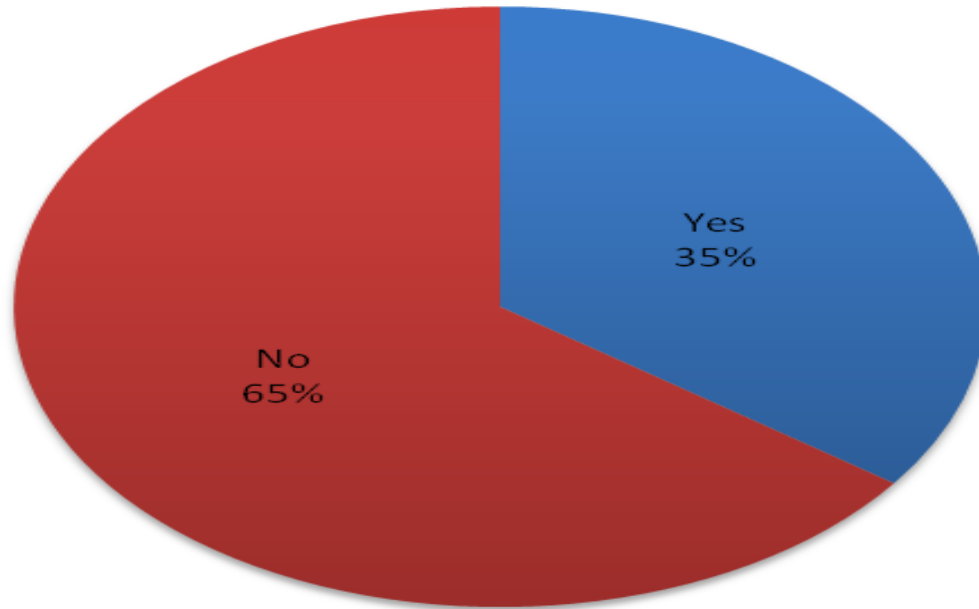


Figure 23: Responses to the question “In the future, do you see yourself watching more TV on the Internet?”

Despite these advantages, less than a half of the respondents (35.0%) felt that they would be watching more television on the Internet in the future (see Table Q42 in Appendix E). This was echoed in the focus groups, for example,

...All the old time television will fade away and I don’t mean in five years from now. I mean sooner. Old television will be gone and then the Internet will be the in thing.

Other reasons for preferring to watch television programmes on the Internet included being able to watch what is not shown on broadcast or subscriber TV, as well as being able to see shows that were missed on broadcast and subscriber TV at a time convenient to the viewer. Respondents also indicated that the main reason for watching TV on the Internet was that of the accessibility to a variety of programmes.

RQ3: What types of radio programmes is the Jamaican population listening to on local stations and the Internet?

In answering this question, a description of the general local radio consumption habits of Jamaicans is given. This is followed by a discussion of the types of radio programmes survey respondents reported they were listening to on local stations and the Internet.

General Local Radio Media Consumption Habits

On a typical weekday, respondents reported that they spent, on average, 10 hours (standard deviation = +/- 12 hours) listening to local radio. The median time spent was 5 hours while the modal time was 2 hours. During the week, time spent listening to radio ranged from 1 hour to 118 hours. On weekends, the time spent listening to radio ranged from 1 hour to 48 hours. The average time spent listening to radio on the weekends was 7 hours (standard deviation = +/- 7 hours). The median time for listening was 5 hours while the modal time was 4 hours.

Three most common times selected for listening to local radio during the week were early morning, between 6am and 9am (40.3%); mid morning, between 9am and noon (18.4%); and early afternoon (12.7%). On weekends, a similar pattern was observed with early morning (24.2%), mid-morning (24.9%) and early afternoon (15.3%) being the time slots most persons selected for listening to local radio (see Tables Q25 and Q26 in Appendix E).

The top three types of programmes respondents listened to on Jamaica's radio stations were news (59.9%), music (66.9%) and current affairs shows (36.9%) (see Table Q27 in Appendix E). In the "other" category, respondents indicated that they listened to early morning programmes, such as *Wake Up Call* with Ron Muschette; *Cash Pot* announcements; talk shows such as *Perkins On Line* and *Ragashanti Live*; and educational and health programmes. Politics, comedy and entertainment were also named among the "other" responses, while some persons listened to the weather and 'everything' on radio.

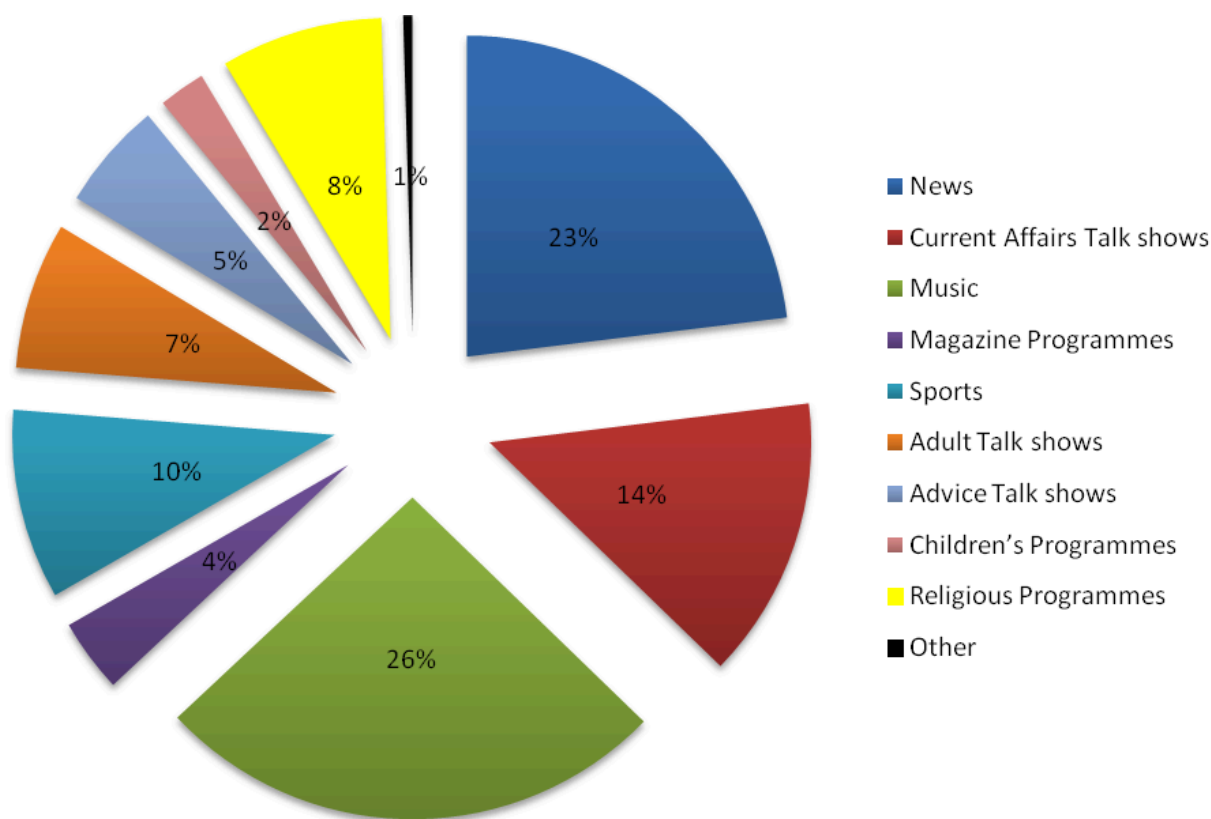


Figure 24: Programmes respondents listened to on local radio stations

The radio is mostly listened to at home (59.7%). A little over a third (36.0%) listened to radio while travelling (by car, public transportation); and 23.4% of respondents at work (see Table Q28 in Appendix E). Apart from the above contexts respondents indicated that they listened to radio on their cellular phones, on the Internet as well as at community bars or shops. This implies that they listen to the radio anywhere that is convenient.

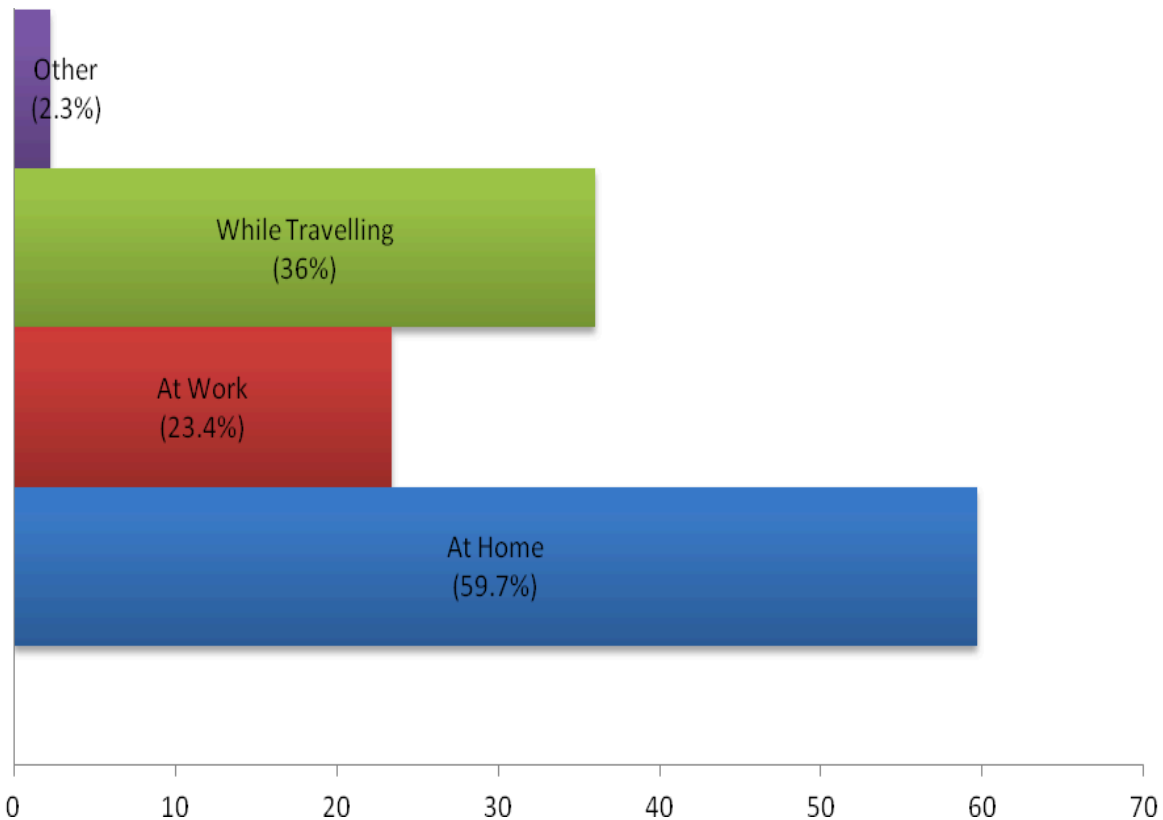


Figure 25: Where respondents mostly listened to radio

Many respondents (89.6%) declared that they were satisfied with the kinds of programming currently offered by local radio stations (see Table Q29 in Appendix E). Those who were not satisfied wanted to hear music (4.8%), current affairs shows (4.4%) and other programming such as educational programmes, non-political and unbiased talk shows, cultural and community development programmes that pertain to 'nation-building', and religious programmes. In terms of popular responses in descending order, respondents wanted to hear: religious; educational; musical; cultural or community programmes; and programmes about issues affecting the youth. Other survey respondents wanted to hear adult talk shows, such as *Ragashanti Live*; non-scientific parenting programmes; history programmes; and programmes with a hotline feature which caters to troubled people. While the survey results suggested that persons wanted to hear more talk shows, it must be noted that in the focus group discussions some

participants felt that the talk show format was too prevalent on local radio and that the content of these shows often provided a constant diet of negativism which they found depressing rather than uplifting.

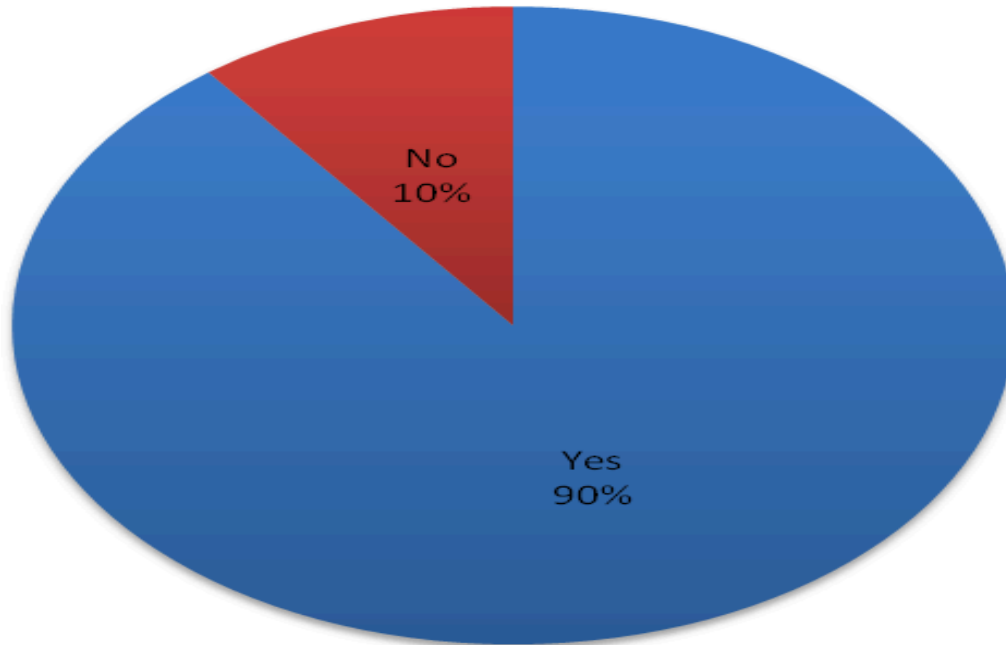


Figure 26: Respondents' satisfaction with the kinds of radio programmes currently offered by local radio stations

Regarding listening to radio on the Internet, only a small number (19.9%) of respondents stated that they listened to local radio programmes on the Internet (see Table Q44 in Appendix E). An even smaller number (9.6%) listened to foreign radio programmes on the Internet (see Table Q46 in Appendix E).

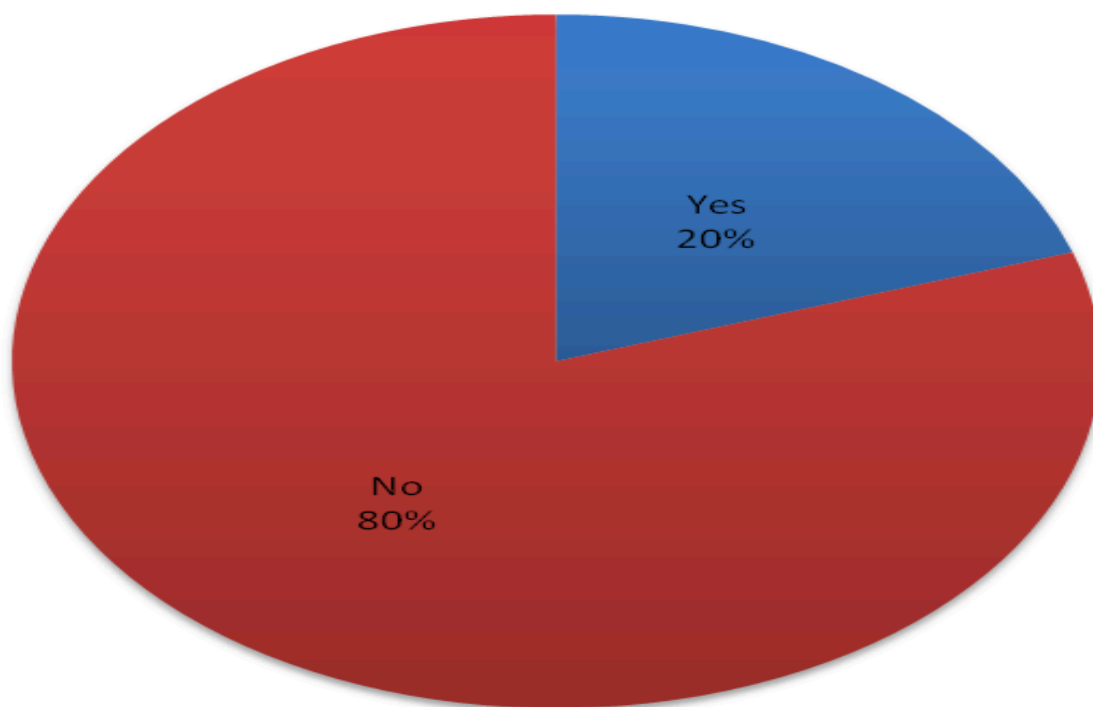


Figure 27: Responses to the question "Do you listen to local radio programmes on the Internet?"

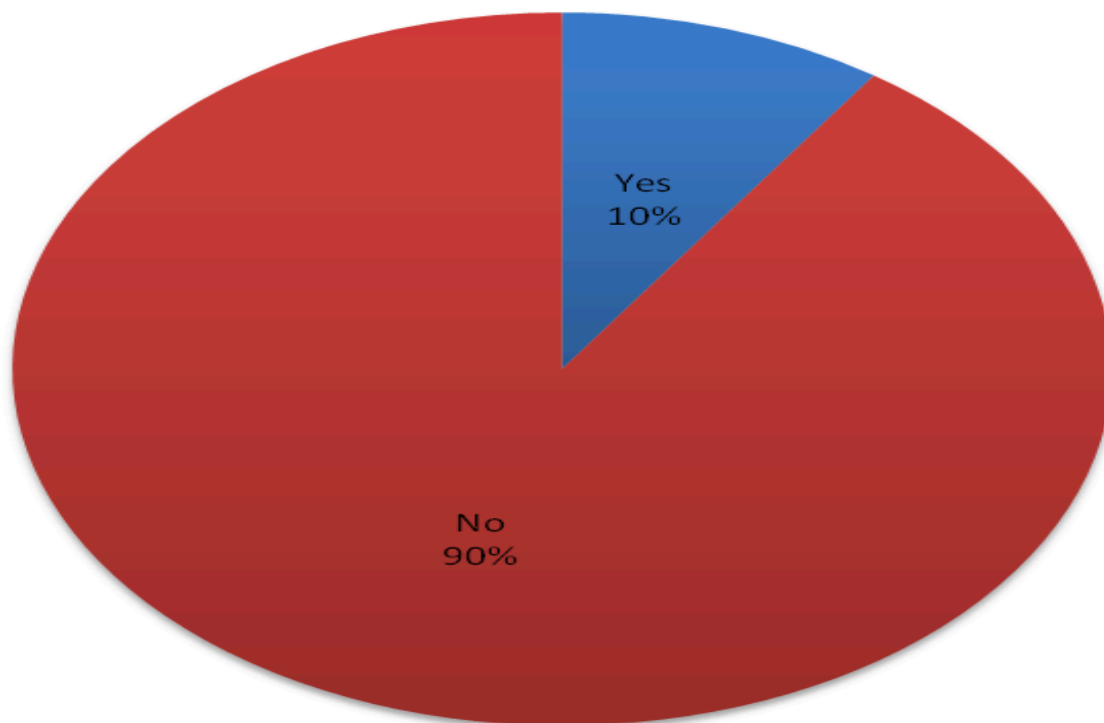


Figure 28: Responses to the question "Do you listen to foreign radio programmes on the Internet?"

The types of local radio programmes consumed on the Internet included mostly music programming and current affairs shows, adult talk shows and news magazine programmes. The types of foreign radio programmes consumed on the Internet included mostly music and news. A more detailed listing of types of programmes listened to follows:

Talk Shows

- *Ragashanti Live/ Tambareen Radio*
- *Di Ends* (Adult Talk Show)

Current Affairs Programmes

- *Beyond the Headlines*
- *Hotline*
- *Perkins on Line*

Regular Programmes

- *Wake Up Call* with Ron Muchette
- *Ruption* with Miss Kitty

Participants tuned in to the following local stations on the Internet:

- | | |
|--------------|-----------------|
| • 103.1 fm | • 876.radio.com |
| • 99.0 | • Fame FM |
| • Irie FM | • Zip |
| • Love 101 | • Mello FM |
| • RJR | • Power 106 |
| • Nationwide | • NCU FM |
| • News Talk | • TBC Gospel |
| • Hitz 92 | |

Respondents listened to the following types of foreign radio programme content on the Internet:

- BBC Extra
- Christmas Music
- News
- Music
- Radio Interviews with Artists
- Focus on the family
- Money Matter
- BBC Sports
- Comedy Programmes
- Sports
- Entertainment
- Religious Broadcasts
- DEF Jay

Respondents also reported that they listened to the following foreign stations on the Internet:
CNN, Defjay.com, BBC, Radio France International and Live365.com.

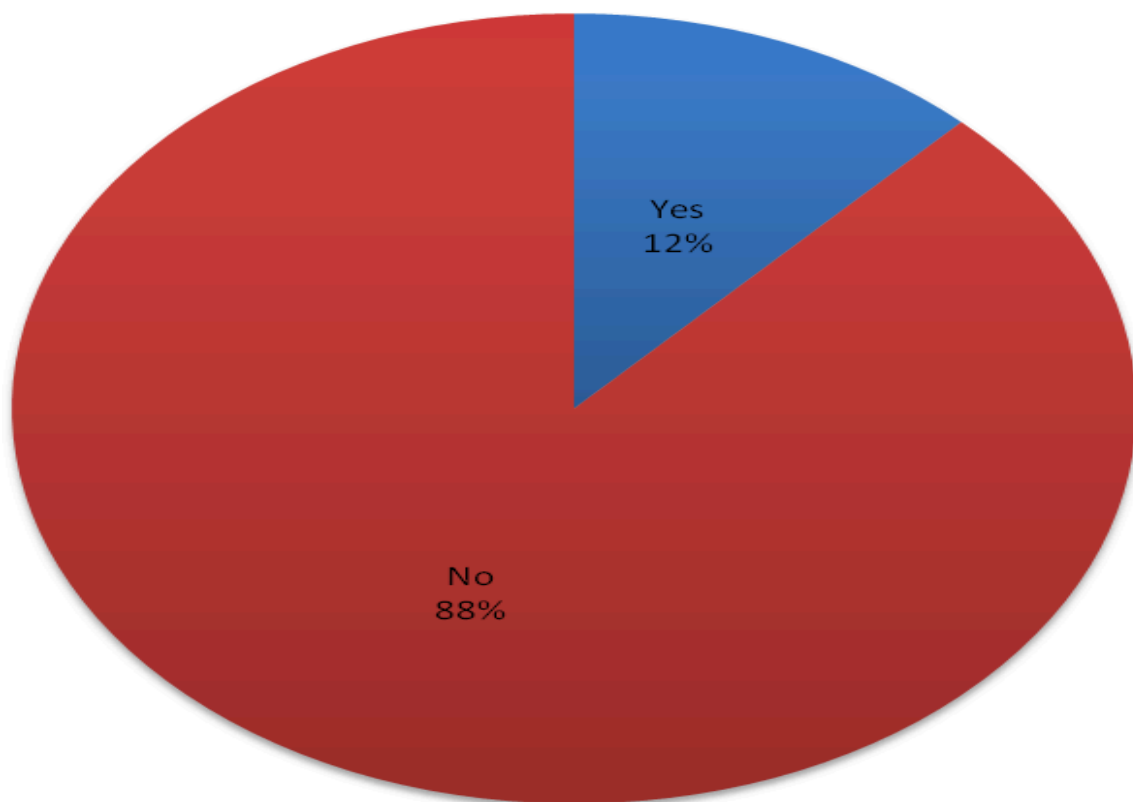


Figure 29: Responses to the question "Do you prefer Internet radio to over-the-air radio?"

About eighty-eight percent (87.9%) of the entire sample stated that they prefer listening to radio over-the-air rather than on the Internet (see Table Q48 in Appendix E). Those who preferred to listen on the Internet gave the following reasons:

- Convenience – The listener spends a lot of time on the Internet and it is therefore more convenient to listen to the radio there than on a separate device.
- Cost effectiveness – Less electricity is consumed.
- Ease of accessibility – Radio programmes can be accessed on other devices such as mobile and computer.
- Variety of programming – The listener can access a wider range of international and local programmes as well as uncensored programming.
- Fewer or no interruptions from commercials/ads and programme hosts.
- Technical quality of the programmes was “clearer online”.
- Did not own a traditional radio set.

Just over eighteen percent (18.4%) of the respondents felt that they would be listening to more radio on the Internet in the future (see Table Q50 in Appendix E).

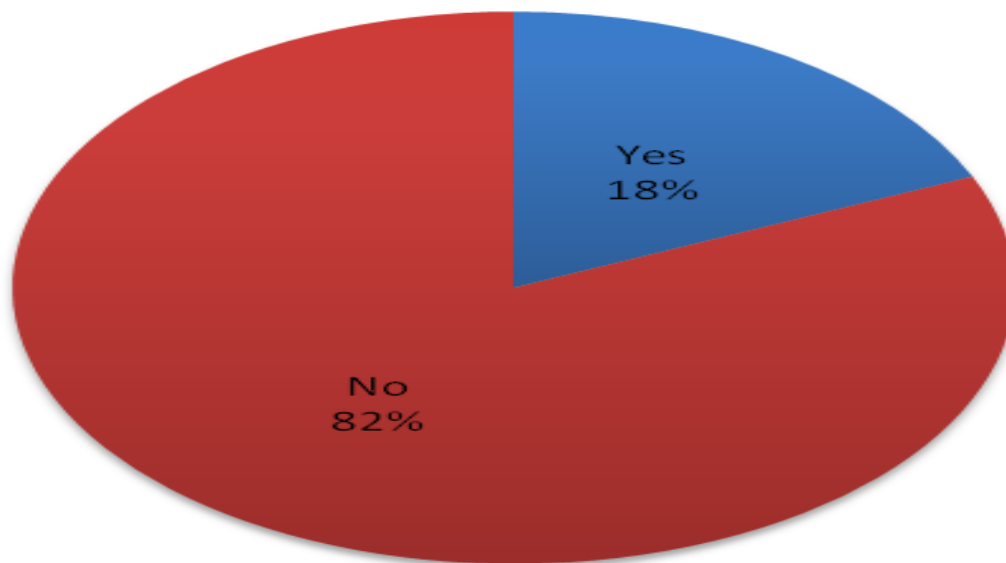


Figure 30: Responses to the question “In the future, do you see yourself listening to more radio on the Internet?”

This marginal change is consistent with the findings for the likelihood of watching television on the Internet in the future. In the focus group discussions, when respondents were asked why they thought the many people did not see themselves watching more TV on the internet in the future, the responses ranged from inaccessibility, technical issues such as buffering speed to the cost of Internet service.

Accessing Newspaper Content on the Web

The percentage of respondents (47.4%) who indicated that they read newspapers online said they did so because it was cheaper (they could not afford to buy newspapers daily) and more convenient to access. One focus group participant stated: “instead of going through a whole paper, you find everything with just one click”. Respondents also noted that accessing newspapers on the Internet was less cumbersome (the Internet did not require them to have a physical storage space). These respondents also indicated that they read the newspaper online for research purposes (to access archives), and to garner information from other sources outside of Jamaica such as the *New York Times*, *The Chronicle*, *The Washington Post* and *The Times*. The ability to access old and current news easily, was also posited by respondents.

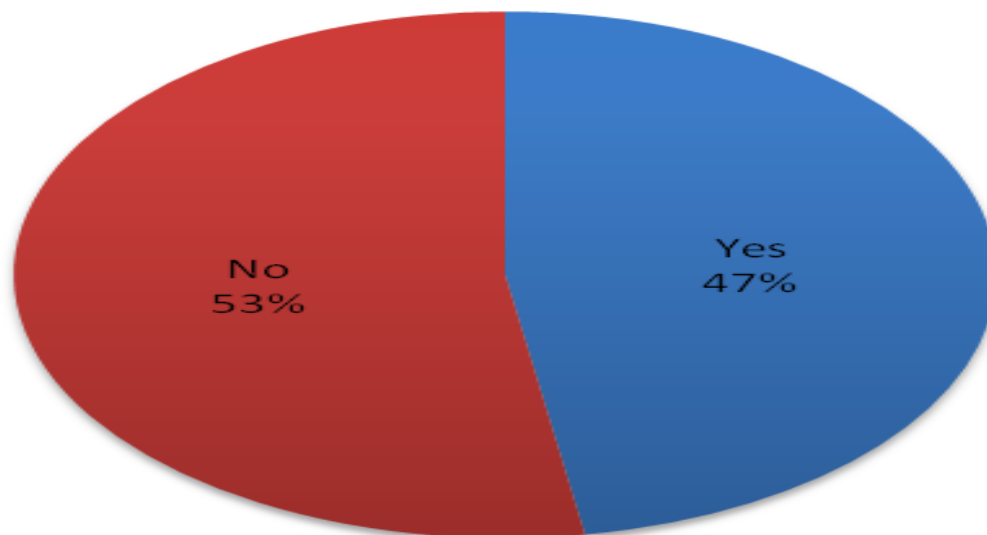


Figure 31: Frequency distribution of responses to the question "Do you read newspapers online?"

For those who did not read newspapers online (52.6%) (see Table 52 in Appendix E) , various reasons were given, including a preference for the hard copy, having regular access to the hard copy version at work, having a habit of purchasing the hard copy and being able to afford the purchase of a hard copy. Some respondents noted it was easier for them to buy the hard copy “around the corner” than having to go to a computer and search for the newspaper online. Reading the hard copy compared to reading on a screen was deemed easier on the eyes for some respondents, hence their preference.

Accessing Television Programmes on Mobile Technology

Ten percent (10.0%) revealed that they have watched mobile TV in Jamaica (see Table Q54 in Appendix E). Programmes watched on mobile TV included mainly entertainment, news and sports programming such as:

- *Ragashanti Live*
- *Buju Banton Concert In Miami*
- *Teacher’s Pet*
- *Dancing Dynamites*

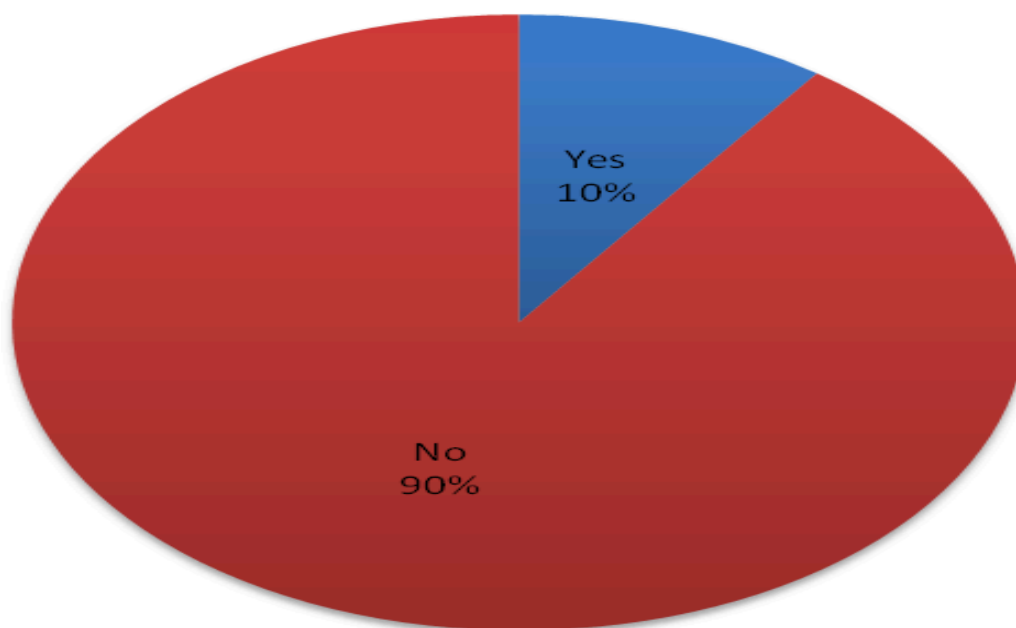


Figure 32: Frequency distribution of responses to the statement "I have watched mobile TV in Jamaica (e.g. LIME TV)."

Respondents also noted that they watched entertainment programmes, such as concerts, news, cartoons (eg. *Sponge Bob Squarepants*, *Rugrats* and *Rocket Power*), soap operas, talk shows, movies and music videos. Others indicated the channels that they viewed such as CVM, Stars, ESPN, ABC, and FOX.

RQ4: What kinds of local television and radio programmes do Jamaicans want to see and hear?

More than half of survey respondents (63.1%) indicated that they were actually satisfied with the kinds of local television programmes on free-to-air TV (see Table Q18 in Appendix E) and 89.6% said they were satisfied with local radio programmes (see Table Q29 in Appendix E). Across both radio and television, music programming was ranked the highest category for content that audiences desired more of (see Tables Q19 and Q30 in Appendix E).

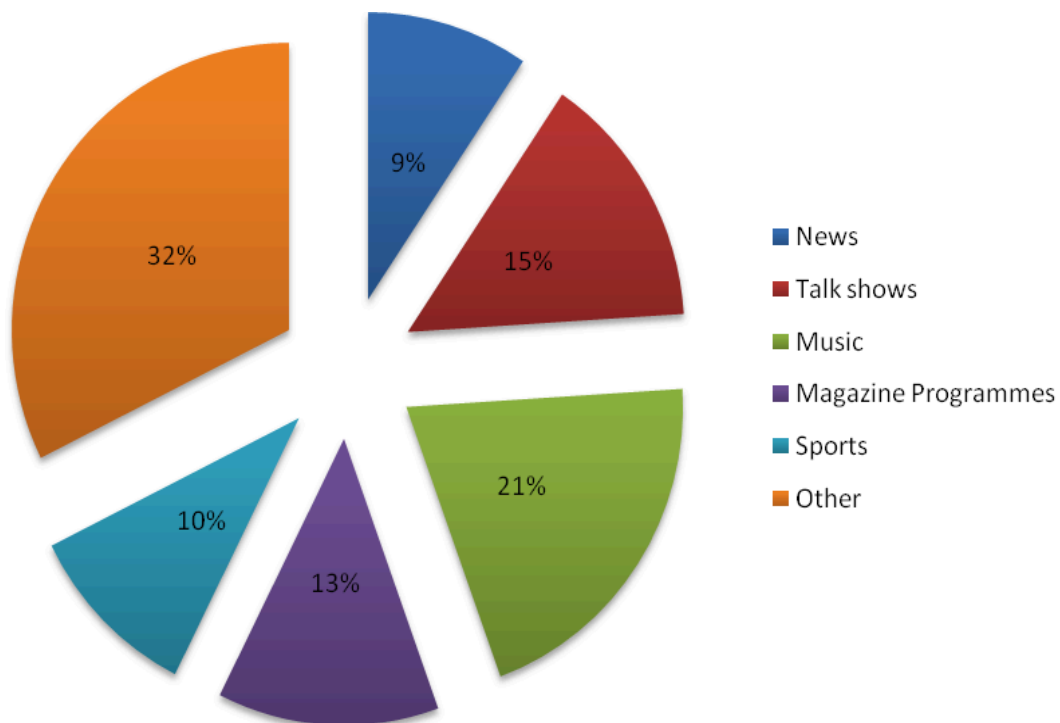


Figure 33: Kinds of local television programmes respondents wanted to watch

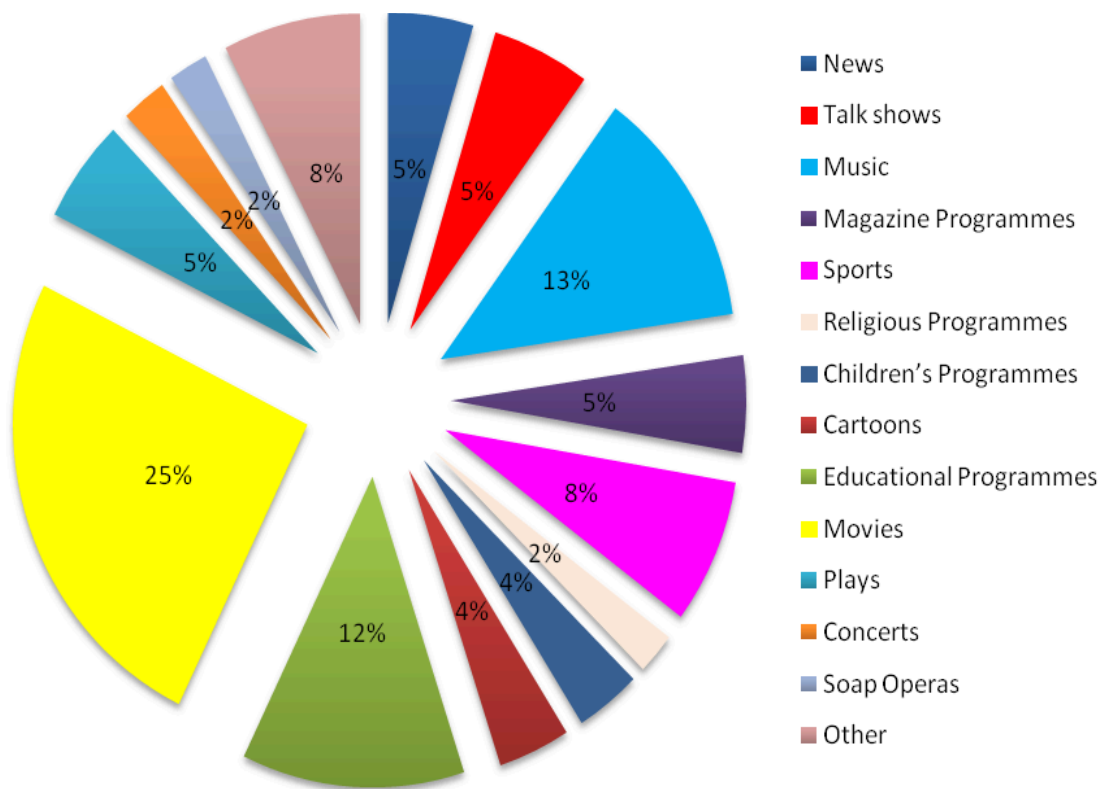


Figure 34: Types of programmes respondents liked to watch on cable channels

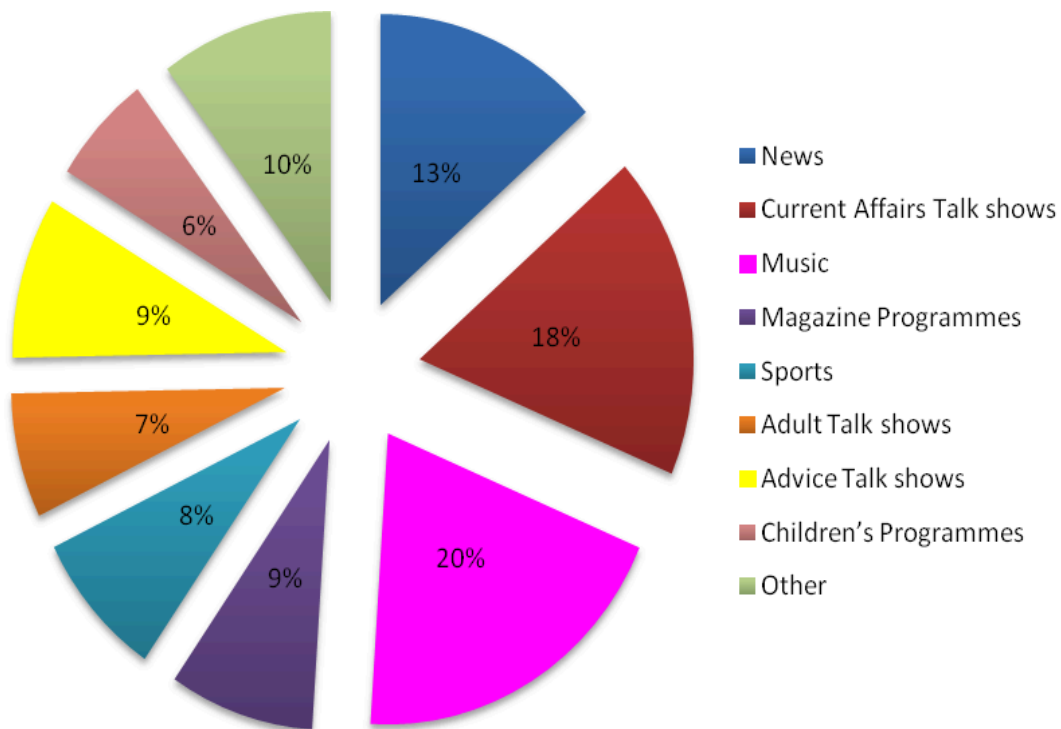


Figure 35: Kinds of local radio programmes respondents wanted to listen to

In focus group discussions there were expressed desires for more educational and culturally-relevant programmes. It was revealed that some are fearful that the Jamaican culture is fading in light of the pervasiveness of foreign programme content and format. Participants were of the view that more programmes needed to be developed to reflect Jamaica's culture and expose the children to the country's folklore, customs and mores. Although Jamaican audiences have access to educational programmes such as *Sesame Street* and *Dora the Explorer*, they do not reflect Jamaican culture.

Some participants said they gravitated toward programmes that showcased Jamaica people and places.

Richie: ... like Hill and Gully and JIS because JIS is a way of me learning about my country and my culture so I'm drawn to watch it and, persons that I work with are drawn to watch it as well.

Hori: I like Jamaican programmes, for example, there is this one where people go around telling people about their favourite cook spots... That is fun.

Participants suggested that animations could be developed that tell "Anancy" stories or that re-runs of Miss Lou's popular show "Ring Ding" could be aired on national television stations. It was also proposed that local plays such as Pantomimes should be aired on television along with local comedies and dramas that depict Jamaican realities. Others suggested the development of local travel shows for the Jamaican audience. From the foregoing it appears that some of these respondents were not aware that some local plays are in fact aired on television in Jamaica.

RQ5: Are Jamaicans aware of the BCJ and its role?

Over two-thirds (69.5%) of the sample knew that media content was regulated in Jamaica (Table Q56, Appendix E); and approximately 52.9% correctly identified the Broadcasting Commission of Jamaica as the regulatory body. Some respondents stated the names of individuals associated with the BCJ, such as Cordel Green and Hopeton Dunn.

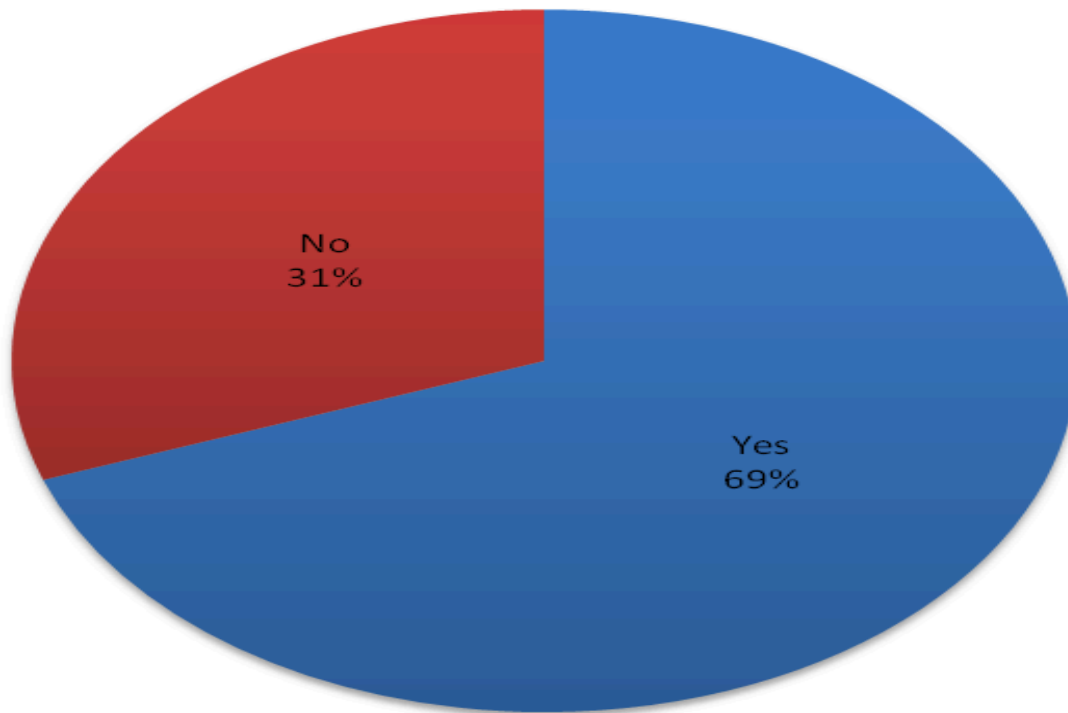


Figure 36: Responses to the question "Do you know if media content is regulated in Jamaica?"

In the focus groups persons were aware of BCJ's role, for example two participants voiced the following:

Asha: They monitor and regulate local media and make recommendations to the ministry.

B: ...I use to hear it and hear a lot about it [BCJ] because I use to listen Zip as well – so when the DJ's would play songs and a curse word would slip or whatever – so probably that's one of the first time I heard it – it was this one big thing when one of the DJ's let a curse word slip – ahm there was this big notice on Zip saying

that the Broadcasting Commission is now clamping down on this DJ so that's about it – yeah that's how I heard about it.

There were respondents from the survey who indicated that they had never heard of the agency before this survey and so the Commission could not be that important. A few stated that they do not know enough about the BCJ to be able to judge if they were really needed in Jamaica.

About half of the respondents (49.2%) have seen or heard advertisements about the BCJ. These persons noted that the advertisements were seen on television, in newspaper, on bus sides or heard on radio (see Table 60 in Appendix E).

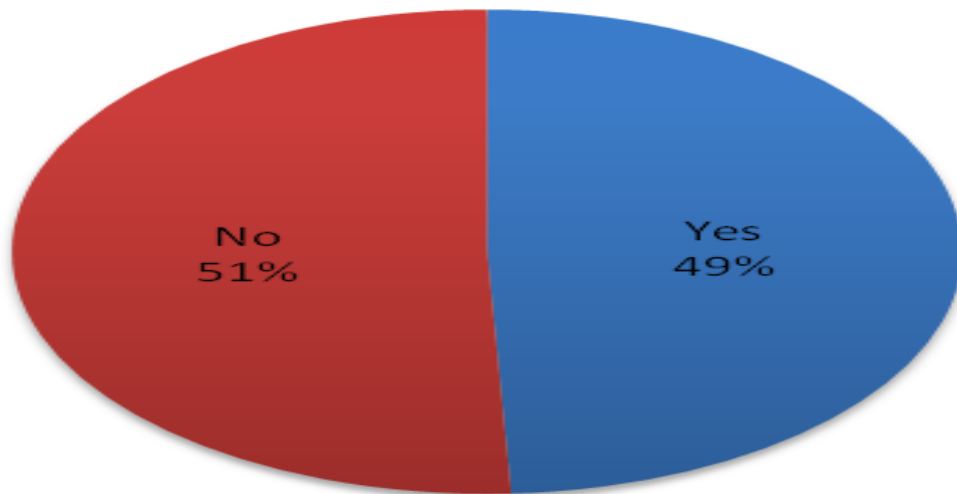


Figure 37: Responses to the question "Have you seen Broadcasting Commission of Jamaica advertisements?"

Forty-six percent (46%) agreed and strongly agreed that the BCJ is visible. A similar number (44.5%) agreed and strongly agreed that the BCJ does a good job of promoting issues regarding electronic media content regulation and policy (see Tables Q63 to Q71 in Appendix E).

Most of the focus group participants knew about the agency and its role, but there were some who were not aware of the Commission's existence. The following are among the comments that were voiced in those sessions.

Marlon: It's surprising that, I am on the Internet so much and I have not..., well, I am learning something new in that we actually have a Broadcasting Commission of Jamaica.

Marcus: I didn't know they have a website... They need to tell the public about BCJ. It is not that we need to know everything about it. It's that we need to know why you do what you do and how you go about it. If we have that information then BCJ would be OK.

Although some focus group participants expressed a lack of awareness of the Commission, it must be noted that the BCJ does engage in consultations and public education activities. Their annual report covering the period 2010/2011 documents: fifteen islandwide stakeholder meetings – one in each parish and an additional one in the municipality of Portmore; a media campaign utilising print, television and radio advertising as well as social media; youth newspaper features and Child Month video competitions (BCJ Annual Report 2010/2011; p. 16-18).

The following represents the top three categories most selected by survey respondents when asked about activities carried out by the BCJ:

- monitoring the transmission of the local radio, local television and cable service providers (65.1%);
- receiving and investigating complaints about local electronic media (49.0%); and
- carrying out the provisions of the Broadcasting and Radio Re-diffusion Act (42.7%) (see Table 59 in Appendix E).

RQ6: Do Jamaicans understand the BCJ's role and functions?

Over ninety percent (92.6%) believe that the Commission is needed and many stated that a regulatory body was important to ensure that broadcast programme content was appropriate for different levels of audiences (see Table 61 in Appendix E). Without a body such as the BCJ many feared that inappropriate content would be aired.

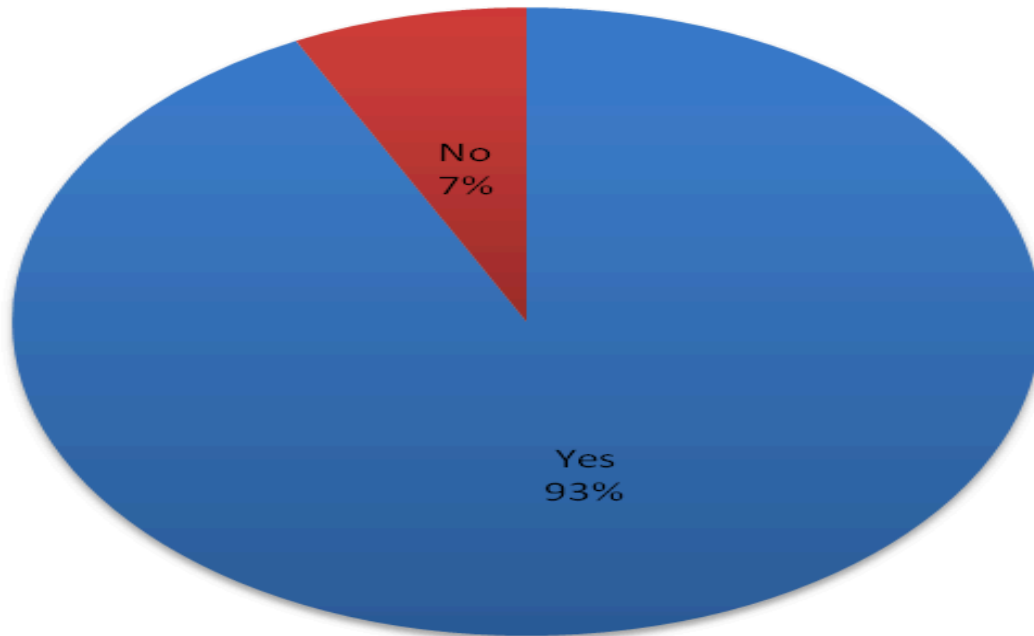


Figure 38: Responses to the question "Do you think the Broadcasting Commission is needed?"

The focus group participants agreed that the BCJ should protect and regulate the public media space.

Rose: Yes, because this helps me to monitor what my 11 year old watches as oppose to the 13 year old.

The preceding comment shows the importance of the Commission's regulatory functions from the perspective of the participants, especially with regard to children.

The following represents a categorised listing of respondents' perception of the BCJ's function. These were garnered from the survey instrument, for the most part, as well as the focus group discussions.

Maintaining Professional Standards: Those who stated that the BCJ was needed, said that the organisation was carrying out its primary function of regulating the kinds of programmes, music, and information that were aired and broadcast on the electronic media. Respondents also said that the organisation was a "watch dog for media", helping to maintain professional standard(s) in the sector.

"Suitable" Content: Respondents also pointed out that as an agent of socialisation, the media houses should be regulated as they had a significant influence on the general public, and children in particular. In this regard, they believed that content aired or broadcast, should be appropriate and "suitable for children to digest". Some respondents actually named programmes that they believed should be regulated, such as *Ragashanti Live* and *Teacher's Pet*.

Some respondents felt that some of the songs on the radio were not fit for air-play as they were "lewd" and "distasteful" and as such, the BCJ was needed to ensure that the media stayed within the required boundaries. "If it (BCJ) was not here, slackness would be rampant," one participant pointed out.

A few respondents indicated that the airing of "inappropriate content" was "still a problem" and as such the BCJ was not undertaking its function and was "not very effective at regulating" the electronic media.

Governance: Others were of the view that the establishment of a governing authority, such as the BCJ was part of the responsibility of government, as there must be a body which ensures that policies and regulations for the media sector were implemented.

Based on the plethora of responses given, the common theme throughout, was that the media could not, and should not be left to monitor its own output, and in this regard, the BCJ was needed to ensure that the rules and regulations governing the media were upheld.

Censorship: Those who thought that the BCJ was not needed (7.4%) stated that the organisation restricted their choice for local media content. Some argued that it was the parents' responsibility to monitor their children's media consumption and not the BCJ. Respondents who did not see the necessity of the BCJ stated that the organisation was a "waste of government money" and that they were not doing enough because children could still access X-rated programming.

Those who stated that the BCJ was not needed said that people should have the freedom to express themselves, even in the media, and by regulating the media, the BCJ was restricting people's creativity. "I view the Broadcasting Commission as a censorship body which stifles freedom of information," said one respondent.

Some respondents also said that the perception of what is distasteful was simply a matter of opinion, and in that regard, the BCJ should not be engaged in censoring "forms of expressions" in the media.

Some respondents stated that the public should choose what they wished to listen to and view, instead of having a body such as the BCJ, issue a directive for the content that it considered

distasteful, removed. Others held the view that the media were capable of self-regulation and in this regard the BCJ was not needed as an oversight body.

Overall the respondents had a fair to positive perception of the BCJ. Sixty-three percent (62.8%) agreed and strongly agreed that the BCJ was effective in carrying out its role (see Table QA 63 in Appendix E) but a fairly low number (37.4%) agreed and strongly agreed that Jamaicans were generally supportive of the way in which the BCJ carried out its mandate (see Table Q64 in Appendix E). In other words while Jamaicans perceived the Commission to be effective they did not feel Jamaicans supported the Commission.

Just under ninety-seven percent (96.8%) of respondents indicated that they had never complained to the BCJ about Jamaican media (see Table Q65 in Appendix E). Of those who complained to the BCJ (3.2%), 27% agreed and strongly agreed that the BCJ was responsive to their complaints, while 14.6% disagreed and strongly disagreed (see Table Q66 in Appendix E).

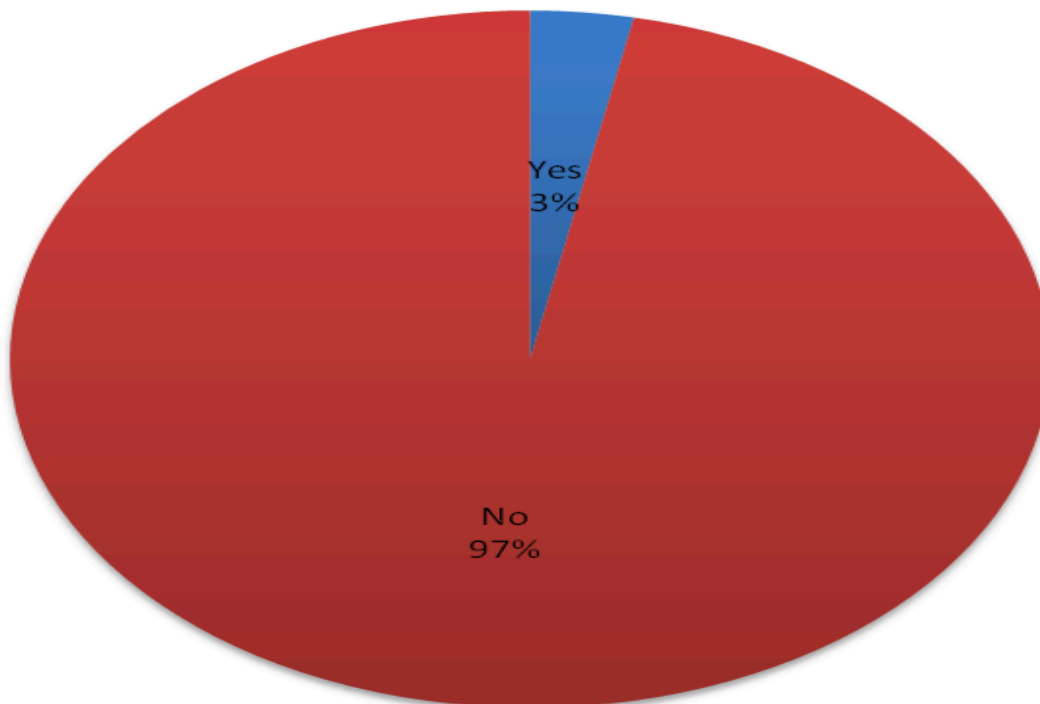


Figure 39: Responses to the question "Have you ever complained to the BCJ about Jamaican media in the past?"

Eight percent (8.2%) of the sample noted that they had visited BCJ's website (see Table Q67 in Appendix E). For those persons visiting the website, 48.5% agreed and strongly agreed that they were able to get the information that they needed (see Table Q68 in Appendix E). Thirty-seven (37.2%) found the BCJ website to be user-friendly (see Table Q69 in Appendix E).

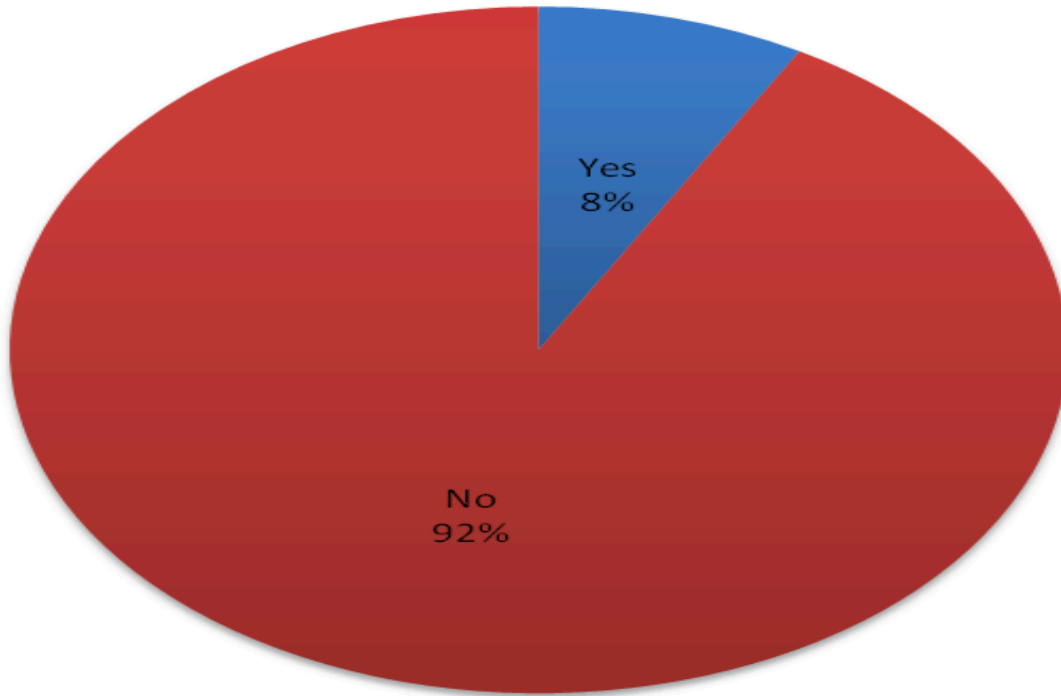


Figure 40: Responses to the question "Have you ever visited the website of the BCJ?"

RQ7: What do Jamaicans think of the Children's Code for Programming?

Respondents from this survey were aware of the programming codes. Ninety-six percent (96.1%) reported that they had seen or heard announcements at the start of TV shows advising of the show's content and its appropriateness for children.

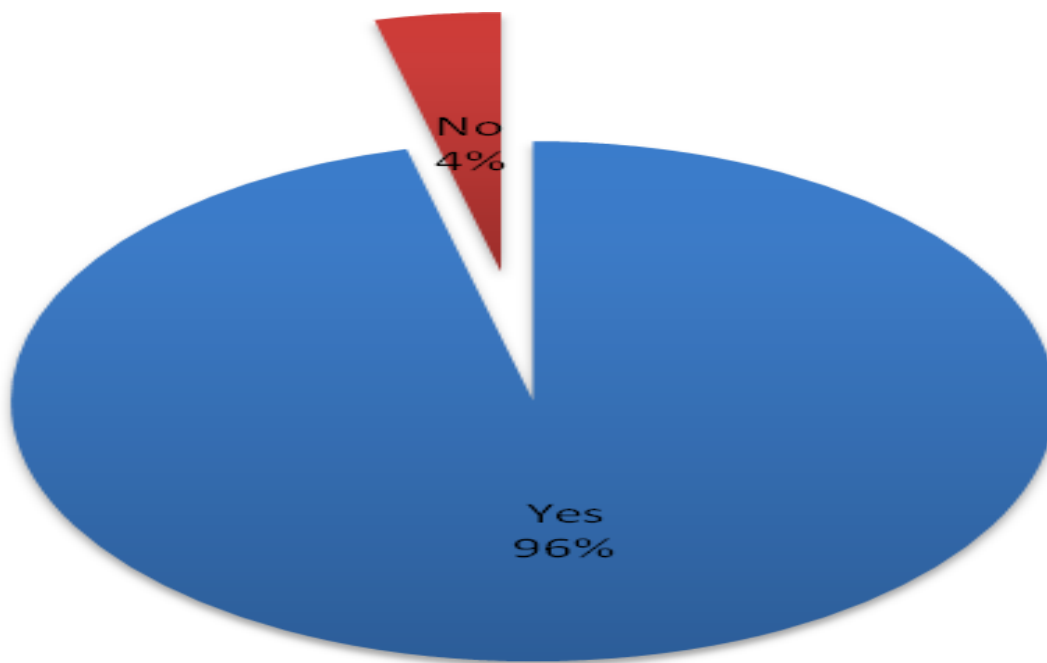


Figure 41: Responses to the statement "I have seen/heard announcements at the start of TV shows warning about the show's content and its appropriateness for children."

Approximately 8 out of every 10 respondents (75.9%), said that they used the ratings or advisories to help them monitor what their children were watching on television. Almost three-quarters of respondents (72.3%) stated that their cable provider had a list of channels with their ratings. Seventy-nine percent (78.8%) also noted that their cable operator provided information about blocking channels. Over two-thirds (70.3%) of the sample felt that their cable

provider offered suitable packages for families with children and 65% felt that programme ratings were effective (See Tables Q72 to Q77 in Appendix E).

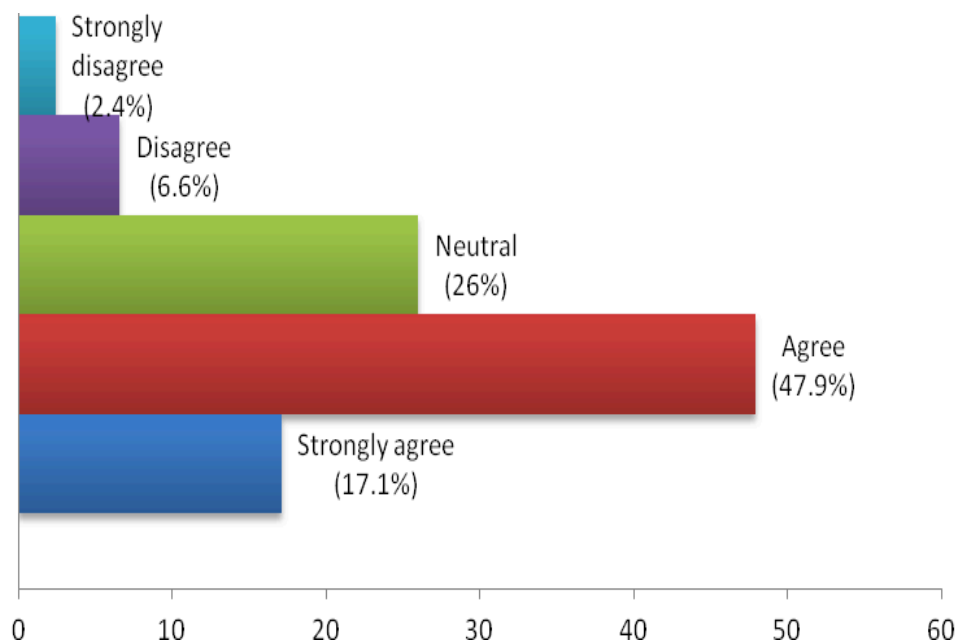


Figure 42: Level of agreement to the statement "Programme ratings are effective."

Some focus group participants found the Code useful as an indicator of the suitability of content.

D: ...my nephew is nine and my cousins are like four and five so for me – if I'm with them and we are watching TV and I see the thing come up and if it's like PG-14 or whatever – I'm like alright let's find something else and they are like okay.

Marie: It is good to have the advisory at the beginning of the programme however, when the programme is being viewed after it has began parents do not know what rating the programme has. In this case perhaps the TV station could incorporate streaming at the bottom of the programme

RQ8: How do local media managers view the BCJ's work?

Managers from traditional electronic media houses and subscriber television operators shared various views on the BCJ's work over the years. There were managers who noted an improvement in the way the BCJ implemented its regulation. Other managers wanted to see more consultation and dialogue prior to the implementation of regulation. These concerns stem from a range of policies, and directives made by the Commission over several years in relation to the electronic media sector; as well as interpretation and perception of some regulatory issues and how they are handled.

The views on the BCJ's work are presented focusing on some key themes. First, some examples of general views are outlined and these are followed by a discussion of more specific regulatory matters.

Views on the BCJ

Managers operating within the subscription television service sector for several years reported that they had experienced a considerable improvement in the way the BCJ had handled breaches. In the past, some managers noted receiving only correspondence outlining the breach, but now, in addition to correspondence, discussions are held with them where explanations are given in detail and the entity in breach is given an opportunity to have an input in determining the time frame within which the breach was corrected.

Another manager of a subscriber television service noted that "BCJ does have an impact. We are not hampered by the regulation...the policy framework is a good starting point I mean 10 years down the road they have to look at it again but I think.... they are heading in the right direction."

Interviewee 11: About two years ago, I was scared of the BCJ. When people would talk about the BCJ, I would begin to tremble but now they have changed. Before now, if you were in breach, they would just issue a letter but now they not only write to you but they meet you one on one and ask how long it will take you to correct the breach. They are looking out for the small cable operators. I am very happy with them. I do not have a problem with the BCJ.

Interviewee 1: I will always say that the consultative process of the children's programming code was excellent and that is a model. It was done by Cordel Green and Sonia Gill and the model that they used when they did that is the model that should be used for consultations full stop. We all sat down and discussed what the problems were. They come up with ideas, we came up with ideas. We got together and pulled everything together. And if you ask the Commission, they will tell you some of the things we said exceeded what they were recommending. Now that is a proper consultation because everybody sat down and worked it through and ever since that we have never had...a genuine consultation since then.

Interviewee 2: Our licence is essentially our bible and that's what governs what we do and so our policies have to underpin the requirements of our licence so our day to day activity is significantly shaped by the regulations and the activities of the regulator. We do not agree with many of the things, but we can't simply disagree with them so it constrains us in many ways even where we have disagreements. In fact in our view, it burdens us with some of the things that are imposed which are outside of the usual scope, for example, we can't edit content in the way that others can edit content in the broadcasting sector in Europe whether it is music or not.

It appears as if some of the managers who were interviewed did not have a clear understanding of what aspects of BCJ's regulations applied to the various sectors. For example, some radio managers seemed to have thought that radio was included in the digital switchover set to begin in 2015 for television. Additionally, some interviewees from radio and television were of the view that the 5% cess that has been levied on cable operators would also be applicable to them.

From the point of view of some interviewees, the BCJ appeared to be more stringent with certain electronic media sector while being lenient to others. An interviewee shared the following perspective:

Interviewee 1: What has been happening, the broadcast side of the industry has been prejudiced because we are the ones who are held to a higher standard of adherence to intellectual property rules because the cable operators, by and large, the channels they are carrying they do not have the permission, the requirement of the Broadcasting Commission is just that they have to show that they have attempted to get permission, whereas we have to show conclusively we have permission.

Some managers also expressed concern about the composition of the Commission, indicating the demographic should be reflective of the population:

Interviewee 7: I say this with the greatest respect to the commissioners. Is there any of them under 40-years-old in the room? Hardly likely, but the majority of Jamaicans today are under 35-years-old. Now that if they are bold enough, or transparent enough they have to shed some and bring into that room a demographic profile that mirrors what is Jamaica in 2012.

This respondent assumed that the BCJ appoints the members of the Commission. However, Commissioners are appointed by the Governor General on the recommendation of the Prime Minister and the Leader of the Opposition.

Views on Specific Regulatory Matters

In addition to the foregoing views on the BCJ's work, there were some specific issues that were presented by interviewees. These matters included the digital switchover, promotion of local content, payola and the editing of content.

Digital Switchover: Media managers had different views on the Commission's approach towards digital switchover. From some responses, there seemed to be a misunderstanding regarding the digitalisation of the electronic media. In Jamaica, the BCJ has set a date of 2015 to

begin the “transitioning from analogue to new digital cable and free-to-air television systems” (BCJ Annual Report, 2010/2011, p. 1.). However, some managers in radio when asked about the digitalisation in general, spoke as if radio would be included in transition process. For example, one manager at a radio station, noted:

Interviewee 1: You cannot be saying to a radio operator, that now you need to go digital by 2015, well that has been changed for television to say that they start in 2015, when India is not going digital till 2020, Chile is not going digital till 2030; most people are about 2018. Digital radio has been proven to [be a] failure everywhere in the world bar none from sound quality to distribution and so on. It has been proven to be a failure...even in London they've shifted the timeline from 2012 to 2017. So even the developed countries and the richer first world countries that have the money to back it up are pushing back. So what is the rush here?

Another radio manager felt his radio station was ready for the transition since his infrastructure was already digital.

Interviewee 8: Well we are already digital so it's not much of a concern to us but I mean it's a concern to all; I mean actually all the broadcast media out there you know free-to-air are all analogue so they are the ones that have the challenge to upgrade their plant... I mean our network, was constructed in 2006 so it was constructed all digital, so it's not really a big concern for us.

These concerns from radio managers are not relevant as there is no digital mandate set for radio. Clearly some radio managers need to be more au fait with the digitalisation process. Some managers felt that the media sector and the public were not ready for the economic cost associated with digitalisation. For managers in the television sector, the following views on the digitalisation process were expressed:

Interviewee 2: That's going to reduce the revenue to the national broadcaster but not reduce the cost of operation to the national broadcaster so you will have high cost of operation and a reduced revenue base and be expected to produce at a higher quality; meet digital switchover charges without any kind of assistance from anywhere; face the winds of economic difficulty and that does not add up in the equation...

2015 is not attainable as a switchover deadline. There are many processes that can start and should start by 2015. In fact, many of us as broadcasters have significant investments already made in digital technology that is being used in the production side of our business. But we are in 2012 and we are at the point where the regulators themselves are just now in the field with a study of the sector to determine the sector's ability, capability and readiness to take on that kind of dramatic shift...

I would think that by 2015 everybody must have a determined plan and a roll out procedure that would start by 2015 and end probably no later than 2020 but which would accommodate if they have enough spectrum to allow simultaneous transmission to have both analogue and free-to-air but that the final switchover is by 2020, is my argument.

In the cable sector, managers expressed being at different stages of readiness for the digital switchover and others being fully digital.

Interviewee 12: I think digitalisation can only promote the country. We just have to move with the technology. It will make a vast difference with the quality of what we put out. I do not think the BCJ is saying that by 2015 we will complete the whole process. They are saying that at least we should start the process. This is my understanding.

Promotion of Local Content: Media managers were asked if they would support a regulatory provision that prescribes the allocation of airtime devoted to locally or regionally produced content. Respondents answered in a manner that suggested that there is a policy regarding local content quota. One media manager commented:

Interviewee 1: The latest thing now is they want to impose quotas, content quotas, that is, you must play a certain amount of local content. Now this may sound strange that we would object to that, but we do. Because from the point of view that if you have gone into business and you are competing in an open market, we no longer live in Jamaica, we live in the world, the world is one place. You can't tell me now, especially in an environment that is dominated by local content that I must play 30% or 20% or whatever is local content.

Some respondents seemed to be in favour of such a policy but was concerned about how it would be funded.

Interviewee 7: It would be lovely to do it, but tell me how you are going to finance it? Tell me how you are going to pay for the staff to research it, produce it, and present it and to produce it in the studio to make it happen and come alive. Tell me where the sponsors are going to come from to keep it going. That is what I am talking about when I say the regulator must be in step with its constituents in terms of the realities because that on the face of it is a very good idea... Excellent idea! But tell me how you are going to finance it?

Interviewer: Would you be more open to the idea of subsidies to media houses?

Interviewee 7: Not subsidies! Finance it! There is a big difference between a subsidy and financing it because right now every media manager I have a board meeting tomorrow morning and in between preparing to go on air I have to damn well know all those numbers. How much it is going to cost me this month for staff expenses, for light, for telephone. I am not going to add a dime to that when I'm bleeding red ink.

The broadcasting of local content is challenged by increasing production costs and a decreasing number of sponsors. The increase in the production cost is aggravated by the taxes and professional fees required by the government and regulating entities.

Among the comments regarding the challenges in producing local content were the following:

Interviewee 3: Creativity is great and necessity is the mother of invention, but it can take you only so far. There are times when you really need financial backing to pull off a certain quality programme. And I find, I wouldn't say unwillingness, but sometimes people are just not able to find the kind of sponsorship; ideas come to me every day but the first thing you need is sponsorship. You know, who is backing this. Show me the money. Show me the budget. And you find that overall its tough in the media landscape.

It should be noted that the BCJ does not require radio or television stations to include in their output, a particular percentage of local programming except in cases where it is specifically written into the licences granted to the media entity. Under the Broadcasting and Radio Rediffusion Act “independent programme providers” must transmit at least 14 hours of new,

unrepeated local content per week on a subscriber television channel. Cable stations are required to have a “community access channel”, which means a channel dedicated to the provision of access to news, information and other content of public interest related to the geographic area or zone served by the subscriber television operator or subscriber television licensee. All-island cable operators are required to provide public access programming to at least three community access channels dedicated to the provision of news, information, community service programming or other related content in the three counties of Cornwall, Middlesex and Surrey. This is stipulated in the licence and not the legislation. All-island cable operators are required to ensure that local content channels represent at least 6% of their total channel output within the first year of operating.

BCJ and Payola: Media managers were asked their views on the BCJ’s recommendation that parliament legislates sanctions for persons found guilty of accepting payola. But some media managers who participated in this study did not support BCJ’s position.

Interviewee 2: I share the view that there is no need for any new law to deal with the payola. Payola can be covered under the anti-corruption law [Jamaica’s Corruption Prevention Act 2000] and therefore we think that what needs to happen is sensitisation and enforcement in that area, rather than to burden draughtsman and to seek to heighten tension and criticism in a sector by singling out on the payola basis; that's one. The second thing is I'd like to make it clear that insofar as our business is concerned as a principle, payola is wrong and payola actually undermines our business. ..I think that there has to be the recognition that with payola we need a partnership approach between the music industry, the regulators and media to tackle it but not the vilification of the media.

Even though it appeared that some media managers were not in support of the BCJ’s position, others were of a different view. The manager of one radio station indicated his support for the BCJ’s position, although his station had implemented systems to guard against payola:

Interviewee 4: I am prepared to support any effort to eliminate payola... I think that anything that can help to eliminate payola [is important] because, you know, we need to realise that radio playing of music is essential. So I would support

that, but on the other hand, I think that there's a lot that media can do, for example at this station, I assume responsibility for approving every song that goes in the system, okay.... In the last year or so I have been delegating that to another manager because you know, I'm not gonna be here forever. And so, we have a system where we have a computer programme and we set up what is called "music clocks" for every hour. We classify all our songs that we have; we classify them in the era: fifties, sixties, seventies, eighties; we classify them in terms of adult contemporary, cross-over country, reggae, ...Okay, that we put in these clocks so each day we have a different clock for each hour, alright. So what the computer does, the computer plays each one of those clocks and the categories that are designated okay. We also have control over how the computer selects the songs because we will write in the program that a song in this category should be played in another segment before it is brought back to that original segment maybe five days later. So once that is put in place, nobody in the building can affect the rotation because it is something that is programmed and all the songs are treated equally dependent on the classification that we give it.

BCJ and Editing: Some interviewees believed that BCJ was over-reaching by stipulating that radio stations should not edit songs to prepare them for the airwaves. Their contention was that if the content was not fit-for-airplay the station should be permitted to edit the song.

Interviewee 1: And even the idea that you are not to edit a song, is now an offence, if you edit a song it is an offence, how can an offence be that you have made sure that something is not offensive? There's something just fundamentally wrong with that kind of thinking. So for instance, I mean as radio stations in particular, tend to face it the most, because they buy a lot of international music and we buy music from services that are for free-to-air, fit for air play and you will get a song that may have the word, let's say "bitch" in it or "ho" or "nigga" which in the US jurisdiction and in many jurisdictions they do not see as unfit for free-to-air but we will look on it and say "boy you nuh, this song is in the top 5 songs played in the world now, we are a popular music station, it fits into the genre we play, therefore, to remain relevant we have to play it", but we think as a matter of sensitivity we do not want to use the word bitch, ho or nigga or whatever it may be and when we take it out we are now [in] breach? That makes no sense and the response of the Commission is, well, the producer of the song has to do the edit, so why is an edit done by the producer more valid than an edit done by a radio station? Either the content is there or it's not. Why is it suddenly conditional on who has done the editing? That makes no sense and realistically

can I call Justin Bieber and say “boy, Justin my man, I need to edit this song for me”, it just makes no sense.

Interviewee 2 shared another view on editing content by expanding on a comment cited earlier:

...we can't edit content in the way that others can edit content in the broadcasting sector in Europe and in North America whether it's music or not. We have been told that we cannot use the tool of editing to make sure that what we broadcast is clean, and we are still required to ensure that what we broadcast is clean and that is a contradiction in our view. We think that the mischief that was being corrected should have been corrected in a different way but not by removing a normal global tool in the media industry for compliance from the tool kit of the Jamaican broadcaster.

From the foregoing, it appeared that some media managers were not fully cognisant of the details of the BCJ's regulations. In some instances, comments were made from an uninformed position which coloured some managers' perception of the BCJ's work. As a result the BCJ was being evaluated on the basis of the managers' own interpretation of regulatory matters which at times differed from what actually obtains. Despite the negative views held by some managers, based on their own understanding of the regulatory framework, there were some positive responses from managers who felt in general that the BCJ has made significant attempts to improve its relationship with its constituents.

RECOMMENDATIONS

The recommendations have been presented according to some of the major themes explored in this research. These relate to programming and content issues in the electronic media sector, the awareness and perception of the BCJ and improvements the BCJ can make to its service. There were additional issues uncovered in the research and some recommendations have been made regarding those as well.

Electronic Media Sector Programming and Content

- The BCJ should explore creative and affordable ways to facilitate the production of good quality local media programmes, with an emphasis on expanding the variety or types of local video/television and audio/radio programmes produced in Jamaica. Currently, most programming relates to news and current affairs, music, sports and to a lesser extent, lifestyle. Additional formats which should be explored include animated programmes, local and regional travel shows, culinary shows, dramas showcasing Caribbean lifestyle. Competitions could be held to encourage local producers to create new programme formats which are appealing to local audiences and are affordable to produce. This is important for cultural preservation. It responds to an issue regarding local media content which has three aspects: demand for local programmes by Jamaicans; high cost for media houses to produce local content; and inadequate access to distribution channels for local content producers.
- Another related issue regarding programming content concerns the extent of negative media programming in Jamaica which some respondents felt was not healthy and led to a depressing outlook on life in the country. It is therefore not only important to expand the variety of programming, but also necessary to ensure that the programming is uplifting, motivational and positive in an effort to balance the existing negative content.

- On the matter of ratings and in particular the Children’s Code for Programming, the BCJ needs to provide more explanation of programming codes to Jamaicans. Two questions which some respondents in this current study had were– How does our code for programming compare to other codes in other parts of the world? Is there a difference between our local ratings and ratings elsewhere? Without the explanation of the ratings, audiences feel as if the BCJ is imposing and attempting to censor. The information on the programming codes needs to be more easily accessible in a variety of formats and disseminated in various ways.
- Regarding the digital switchover, the BCJ must facilitate broadcasters in finding ways to manage the transition. They can do this by identifying possible alternatives, such as conversion technologies, which may be more affordable than what is feared to be an expensive process. More consumer education about the exact meaning of the digital switchover is needed for audiences who may not be aware of the impending changes. The BCJ should partner with the Consumer Affairs Commission, for example, to educate consumers about purchasing appropriate television sets.

The Jamaican Public’s Awareness of the BCJ

- The BCJ should implement an on-going public awareness campaign focusing on the services it provides for Jamaican audiences. The campaign should aim to establish the BCJ’s presence in both urban and rural settings. In addition to traditional media channels, the BCJ should use non-traditional methods to reach audiences. Despite the fact that the Commission holds public meetings a minimum of every two years, community-based interventions such as town hall discussions hosted in the various parishes across Jamaica would be an effective strategy for sensitising Jamaicans to the BCJ and its work. Research participants appreciated the focus group discussions and

noted that activities like these could be hosted by the BCJ on a more regular basis. The BCJ could also lobby the electronic media sector to promote a public responsibility message: “How is our programming today? Call the BCJ.” This could encourage media consumers to be more proactive in contacting the BCJ about matters regarding programming quality and content.

The Jamaican Public’s Perception of the BCJ

- While the BCJ is already implementing strategies to manage the Jamaican public’s perception of the Commission and its work, it needs to increase its efforts to make the public more aware of its role and functions. The BCJ should make it clear that one of its roles is to protect and not control users of the public airwaves. This may require more outreach as well as additional explanations about the BCJ’s response to the sometimes controversial matters arising in the media sector. The Commission is already reaching out to school youth through various interventions (see “Consultations and Public Education” on page 16 in the BCJ’s Annual Report April 2010 to March 2011) and this should be continued in an attempt to connect with young people.

Jamaican Media Managers’ Perception of the BCJ

The BCJ needs to engage in more consultation with its key stakeholders. There is a need for adequate communication and dialogue that lead to clear understanding of the issues. The BCJ should explore establishing a communication mechanism which puts it in direct and regular contact with its stakeholders, thus creating a stronger link between the Commission and the industry it serves. Media managers felt the consultative process used in the development of the Children’s Code for Programming was exemplary and suggested that other issues should be approached using a similar process. The deadline by which the digital switchover should begin, according to some managers, was not

handled properly. Some managers saw it as an imposition and said that there was inadequate consultation to decide what is feasible for media houses.

Improvements the BCJ Can Make to its Service

- The BCJ should consider further explaining the rationale for its decisions regarding regulatory matters as this is not always clear to members of the public. The Jamaican public will be more appreciative of the Commission's work if they understand why the BCJ responds in the way it does to certain media issues.

Additional Issues

The researchers found some additional matters which the BCJ may want to consider addressing as it continues to serve its stakeholders.

- Misbehaviour online. With the increasing popularity of new media and the access to the Internet, the BCJ may want to address issues which arise from the use or abuse of new media and the Internet. These issues may include cyber-bullying, cyber-stalking, teasing and privacy invasion.
- Economic constraints. The BCJ should be sensitive to the current economic challenges facing its stakeholders and how it affects their ability to finance certain licensing requirements and digital switchover.
- Special needs for people with disabilities. Broadcast stations are inconsistent in offering audio cues for the visually impaired; the BCJ should ensure broadcast entities provide this service so that the information needs of specially challenged groups are met.

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