



# **BCJ Campaign Evaluation Report 2018**

**Prepared by Hope Caribbean Company**

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## Introduction

- The media landscape is constantly evolving as new technology emerges. Content is now delivered through on-demand services such as Netflix and varying satellite, cable and internet platforms. These platforms are accessed through various ways using different devices, ranging from TV (both traditional and smart) and computers to smart phones, tablets and gaming consoles.
- Against this global backdrop, countries are exploring public perception of online protection measures. These measures include the use of Standards, Content Information Signposts and Access Control Tools.
- The Broadcasting Commission of Jamaica (BCJ) ran a public education campaign focused on Media Literacy in 2018. The campaign also addressed issues relating to online activity and content. Hope Caribbean Co. Ltd. conducted qualitative and quantitative research to explore the extent to which the campaign met its objectives, as well as the general public attitude towards online protection and/or regulations. The results of the study are detailed in this report.



## Methodology

- In order to achieve the project’s objectives, Hope Caribbean utilized a two (2) phased approach.
- The first phase was qualitative and focused on the public’s attitude towards protection for content delivered online and on a range of internet connected devices.
- Focus Group Discussions were the qualitative method employed. Key findings of the qualitative phase were quantified in the second phase.

FOCUS GROUP DISCUSSION BREAKDOWN				
<i>FGD</i>	<i>Gender</i>	<i>Age Group</i>	<i>Socioeconomic Group</i>	<i>Segment</i>
1	Mixed	15-19y	ABC1	
2	Mixed	15-19y	C2D	
3	Mixed	20-29y	ABC1	30% parents of children under 13yrs; 30% parents of children 14-19yrs
4	Mixed	20-29y	C2D	30% parents of children under 13yrs; 30% parents of children 14-19yrs
5	Mixed	30-39y	ABC1	30% parents of children under 13yrs; 30% parents of children 14-19yrs
6	Mixed	30-39y	C2D	30% parents of children under 13yrs; 30% parents of children 14-19yrs

## Methodology

- The second phase, which was quantitative, involved a face-to-face intercept survey with 403 individuals.
- Interviews were conducted by trained interviewers. A structured questionnaire developed in collaboration with BCJ was used to collect data. A supervisor was present in the field with interviewers to handle on-spot problem solving and to ensure validity of data collected.
- To facilitate faster turnaround, quantitative data was collected via mobile devices. Fieldwork was conducted in October 2018.

SURVEY SAMPLE	
	<i>Sample Size (n)</i>
Male	199
Female	204
10-17yrs	100
18-65yrs	303
Urban	203
Rural	200

## Summary of Findings: Online concerns and attitudes to protection

- Respondents are cognizant of dangers online and the subsequent need for varying degrees of online protection.
- Protection for children is widely supported.
- A fair level of endorsement for the need for online protection exists among respondents, even as many also support the online world as a space for freedom of expression.
- This indicates that appropriate regulations in the digital space is likely to be acceptable particularly if it protects while still allowing adults choice and freedoms.
- Protection measures in general are more likely to be supported particularly as it relates to the provision of providing information on inappropriate content.
- Protection in the study primarily refers to a context of providing more information activities and less as regulatory measures. While there was generally good support for protection, the study does not provide the extent to which protection/regulation will be perceived as being too much.



## Summary of Findings: Awareness of and Attitudes to the BCJ



- The awareness of BCJ is relatively high among respondents. BCJ is perceived to play an important role in providing protection for online activity.
- The protection of children based on online activity was a main motivator in the levels of support of BCJ and online protection activities.
- The Broadcasting Commission of Jamaica was endorsed as an important and necessary agency.

*“They are the TV police, if they are not there then its chaos on the TV...without boundaries people will put up anything.”*

*“They give guidelines. They keep stations in check. They determine the shows children can watch.”*

## Summary of Findings: Awareness of and Attitudes to the BCJ



- Quantitatively, there was strong support for the BCJ with many (45%) strongly endorsing the Commission on almost all attitudes probed (12 to 13 of the 13 attributes probed).
- The BCJ was endorsed most for being relevant (79%), needed to monitor what is being broadcasted (81%) and doing important work (77%).
- As it relates to digital media, the BCJ was strongly endorsed as:
  - Being an entity which should educate the public on how to protect themselves and their families online (82%),
  - Capable of educating the public about protection for audiovisual content online (70%)
  - Doing a good job at educating the public on the dangers of the internet (73%).

## Summary of Findings: Campaign response



- The campaign had high overall recall with 90% of persons reporting having seen at least one of the ads comprising the campaign.
- Individual ads were generally well liked and thought informative, relevant and easily understood.
- The ads most recalled were “Fake news” followed by “iCat Delivery Room” at 71% and 63% respectively.
- There was wide spread awareness of BCJ as the campaign sponsor. Approximately half (49%) of those recalling the campaign correctly identified BCJ as the sponsor of said campaign.



# DETAILED FINDINGS



# The Internet

## Internet

### Internet is used...



- For information purposes
- To communicate with individuals globally
- For work purposes (Working online/  
marketing business online)
- For entertainment purposes (movies,  
videos, etc.)
- For financial transactions/updates (online  
banking, online shopping, etc.)

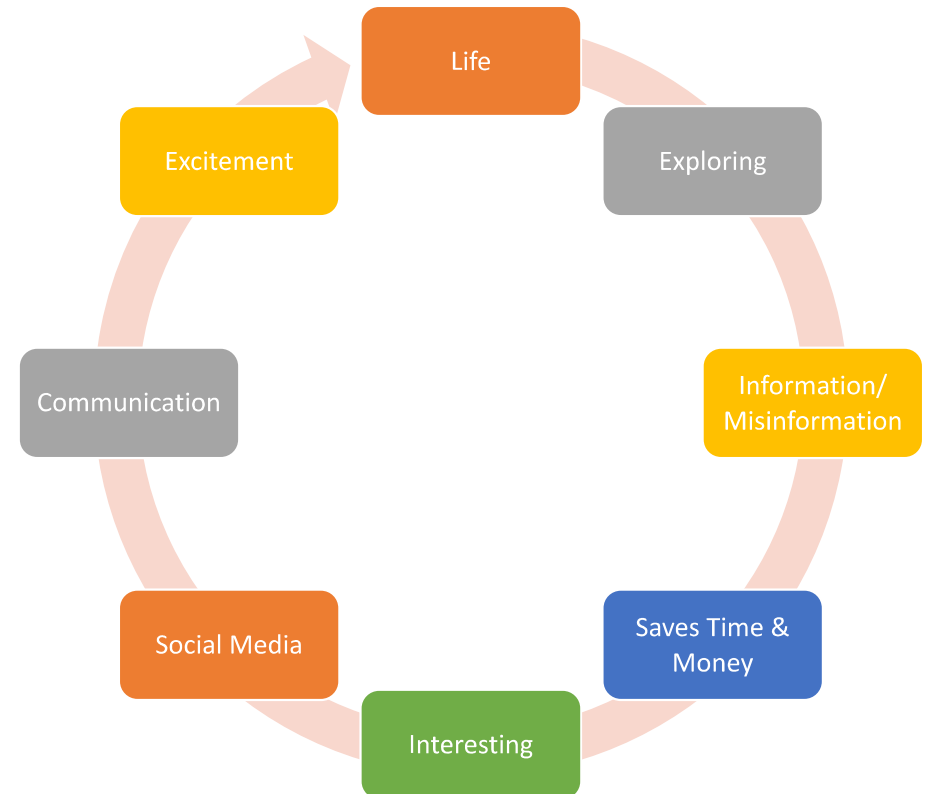
- The internet is an integral part of most participants lives. It is a source of information (*academic and otherwise*) as it broadens knowledge base. It is also an avenue to connect with individuals worldwide, and is used for work and general entertainment.

*“Because the internet is like our bible now, in terms of researching, school, social media, everybody uses that...the gateway to the world...it’s easy access, you know like before you had to go to the library, now you just put [in] whatever you want and it comes up.”*

*“It is like a mall, just like a mall you have a bookstore, a library, just like the internet, you have a library you can research, you have stores that you can shop and all of those things”*

## Internet

- The internet makes life easier in many ways, from meeting new people thousands of miles away to completing school assignments.
- It is perceived as providing opportunities that might not have existed otherwise.
- Without the internet, many would likely feel lost, and life, in general, would become more difficult. Specifically, some tasks would take a considerably longer period of time to complete. *E.g. doing research for school assignments will require going to the library and browsing several books and newspaper archives.*
- However, most participants, especially those who were older, indicated that they would eventually adopt to life without the internet if necessary.



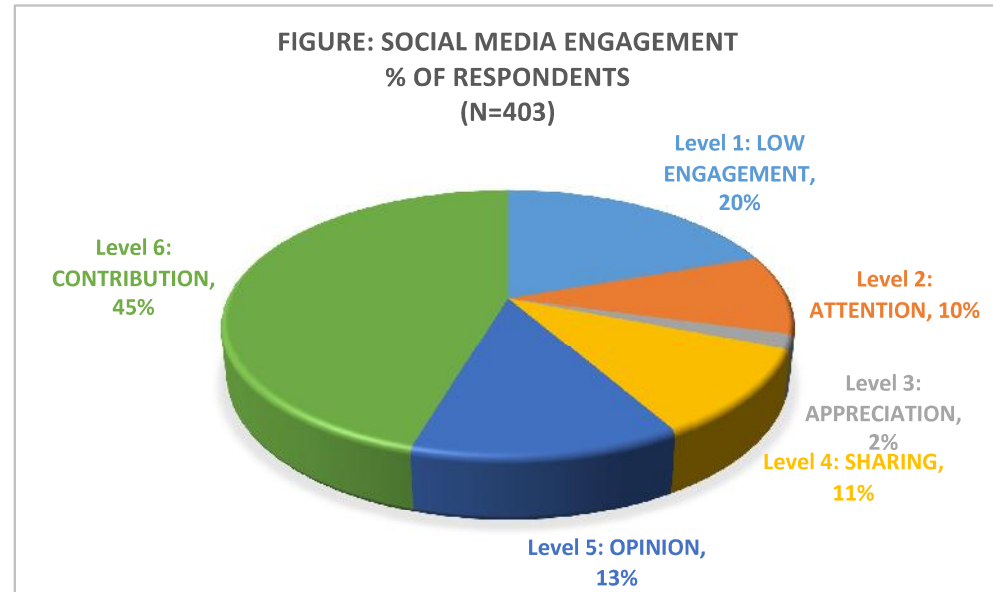
***“Bring the world at your feet.”***

***“Everything that is unknown is known.”***

# Social Media Engagement

A social media engagement scale was developed to profile the sample. This was done to ensure respondents were persons with experience online. This comprised 6 levels of engagement. Each higher level corresponded to a higher level of engagement and is explained below:

- LEVEL 6: CONTRIBUTION
  - The user is starting to produce his/her own content he wants to share with followers/friends. He/she posts videos, pictures, blogs etc.
- LEVEL 5: OPINION
  - The user starts to express opinions on friends updates and posts and leaves comments
- LEVEL 4: SHARING
  - The user updates status/profile, shares posts or even shares virtual gifts.
- LEVEL 3: APPRECIATION
  - The user decides to show his/her appreciation on a post, through likes.
- LEVEL 2: ATTENTION
  - The user is following updates, pages and people but not looking to interact with them.
- LEVEL 1: LOW ENGAGEMENT
  - The user is not engaged in any social media engagement or messaging and games only



- The survey phase revealed many persons having high online engagement, particularly in social media.
- Almost half of the participants were at the highest level of social media engagement as Contributors. Approximately 45% of participants were posting pictures/videos/blog entries.
- Interestingly, two in every ten participants were engaged in very little social media

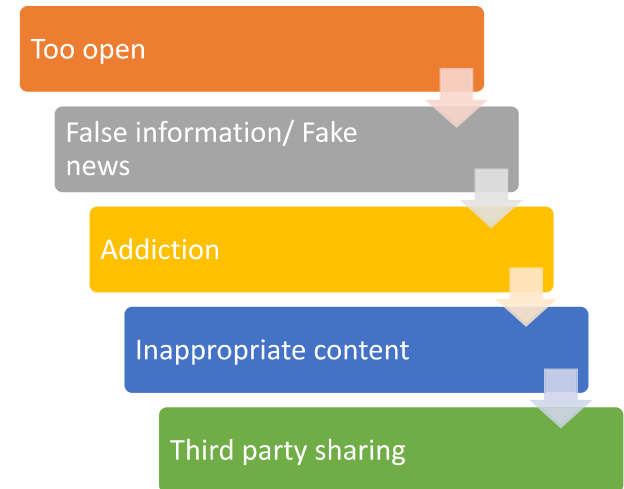
(Source: Quantitative Phase)

## Internet Concerns

- Concerns about the internet were centered around its lack of restrictions, stating that it is **'uncensored'**. Parents, in particular, were concerned about children being exposed to inappropriate content. For example adult oriented audio-visual content pops up on sites that are not only for mature persons.

*"[child] was watching a simple cartoon and it turned into something else, something sexual..."*

- The internet is also **'easily hacked'**. Participants speak of unsuspecting individuals being tracked online, apps disclosing geographic location or even listening to conversations without their knowledge.
- Many noted that while the internet has a plethora of information, so much of this is incorrect/false leading to exposure to fake news and false information.
- There was also great concern for sites sharing personal information without consent or requesting too much personal information
- Applications requesting access to other unrelated applications was seen as unnecessary and invasive. *E.g. music app requesting access to contacts*



## Internet Concerns

- Concerns were also expressed for how the internet affects one's life in different ways.
- Internet addiction was a concern raised, whereby individuals become so heavily reliant on the internet that they lose touch with reality and are essentially strangers to face-to-face human interaction or become generally disconnected from the real world.

*"We depend on it too much, it's like our lives revolve around it."*

*"It's like we're trading human interaction for online attention."*

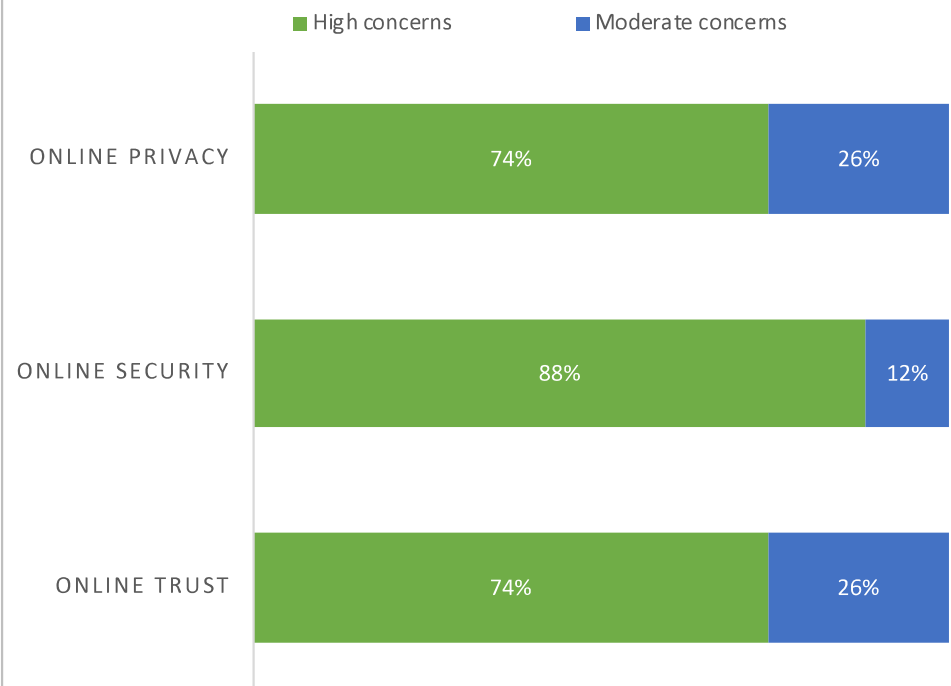
*"We are spending less time with each other and more time with social media."*

- The concerns expressed in the qualitative phase were supported by the findings of the quantitative phase.



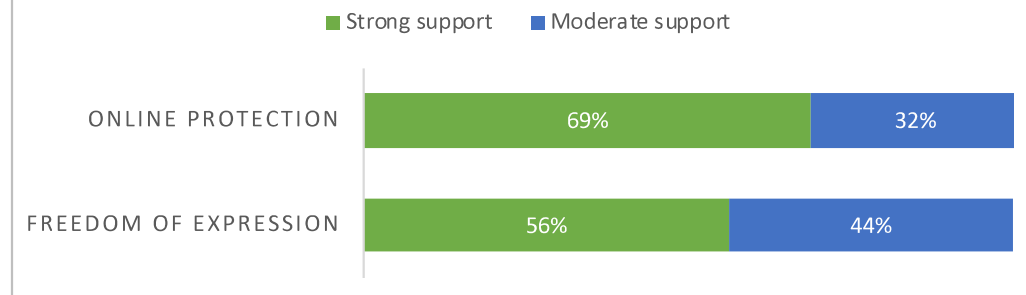
# Online Concerns

**FIGURE 1: ONLINE CONCERNS**  
 % OF RESPONDENTS REPORTING HIGH/ MODERATE CONCERNS  
 (N=403)



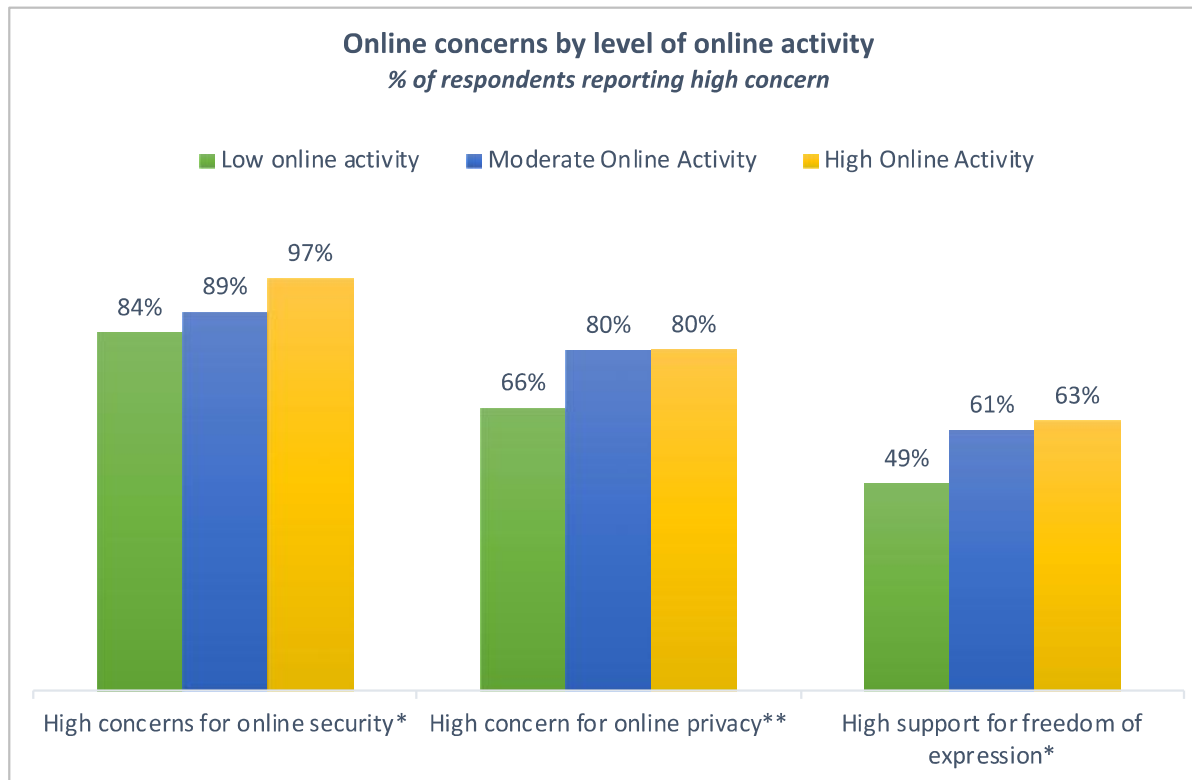
- The support for online protection measures was underscored by the relatively high level of concerns related to online usage.
- More than three quarters of respondents displayed high concerns for online privacy (74%), online security (88%) and online trust (74%). Thus, most showed strong support for online protection.
- While there was strong support for online protection, more than half also showed strong support for online freedom of expression (56%).

**FIGURE 2: SUPPORT FOR ONLINE PROTECTION AND FREEDOM OF EXPRESSION**  
 % OF RESPONDENTS REPORTING STRONG/MODERATE SUPPORT  
 (N=403)



(Source: Quantitative Phase)

## Online Concerns



- Online concerns were also explored based on level on online activity. The past seven (7) days of engagement on zero to a maximum of 3 different types of online activities was classified as low activity. Engagement in 4 to 7 activities classified as moderate activity and engagement in 8 or more activities in the past seven (7) days was classified as high online activity.
- Concerns as it related to online dangers were generally higher among persons with moderate to high levels of online activity.
- At the same time, those with high to moderate levels of online activity were also the persons more likely to show high support for online freedom of expression.

*(Source: Quantitative Phase)*

## Protection for Online Content

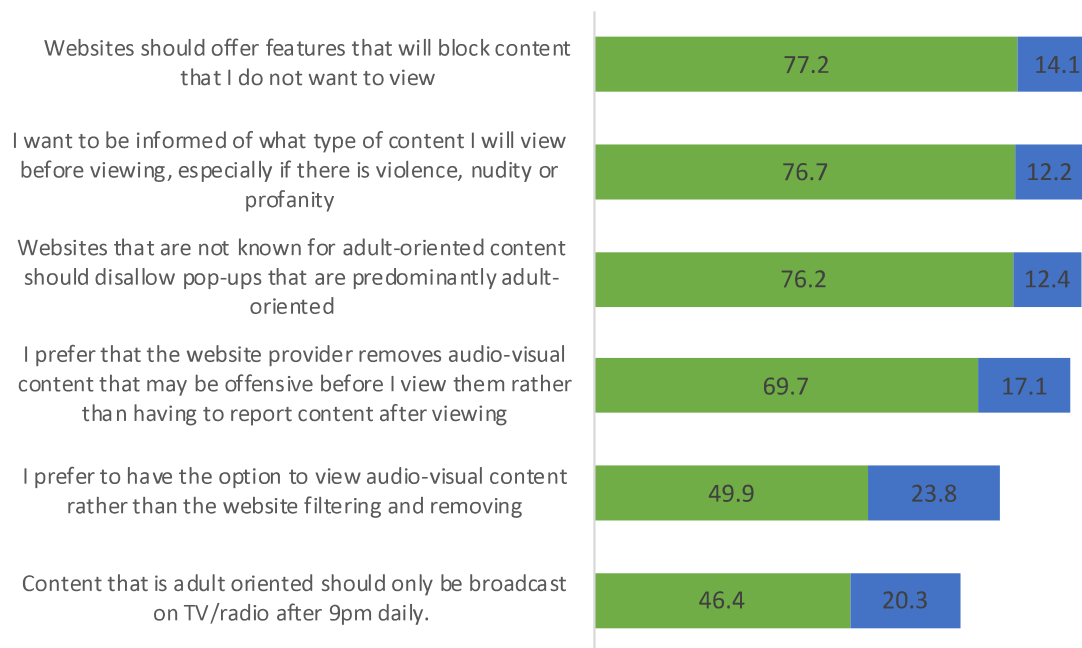


- Overall, participants viewed protection for online content as important and necessary.
- Content was easily accessed online and without some sort of protection:
  - *“Children will inadvertently be exposed to adult oriented content”*
  - *“if the child can’t watch it on the TV, they go on the internet to watch it because the internet has no boundaries”*
  - *“Individuals are susceptible to hackers”*
  - *“Undesirable content”*
- The internet was not only being used for entertainment purposes but also to conduct business which sometimes involves financial transactions. Therefore, protection for personal information was desired.

## Online protection attitudes and perceived importance

**Figure 4: General attitudes to online protection**  
 % of respondents reporting strongly agree/ somewhat agree  
 (n=403)

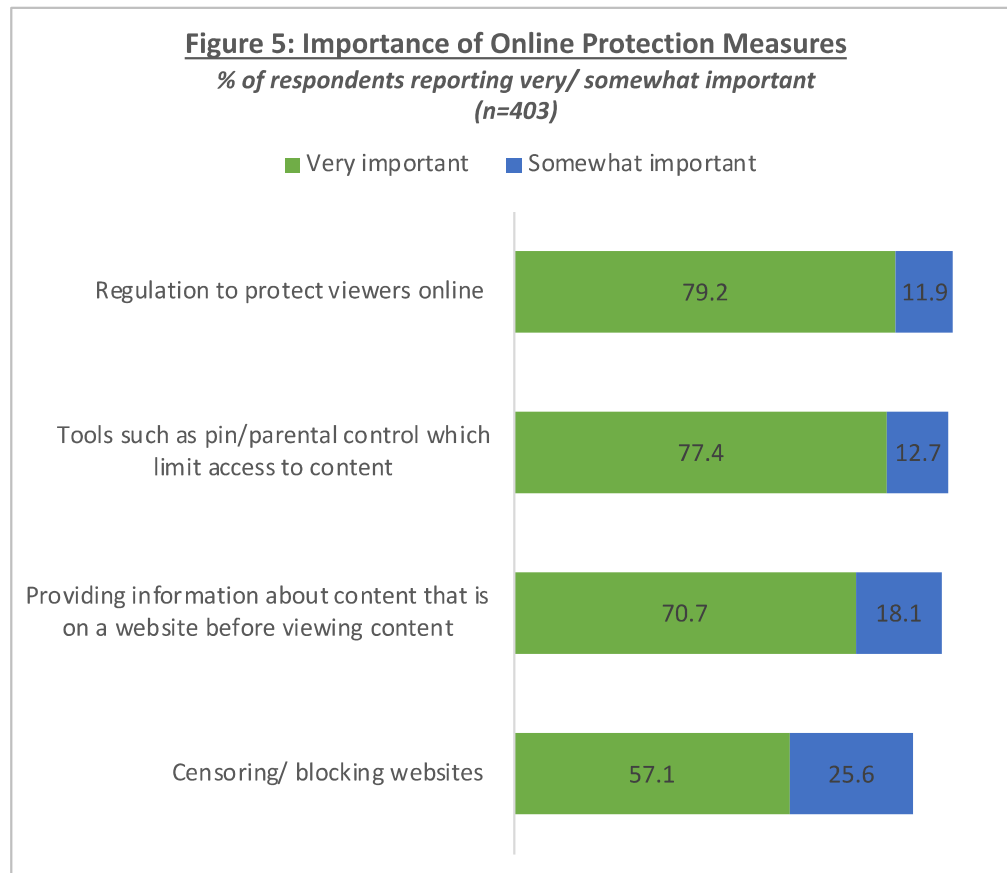
■ Strongly agree ■ Somewhat agree



- Respondents generally displayed very supportive attitudes towards online protection.
- More than 7 in 10 strongly endorsed that:
  - Websites should offer features to block inappropriate content
  - They should be informed of the type of content being viewed before viewing
  - Adult oriented pop ups should not be allowed
- Many also strongly endorsed that adult oriented content should be broadcast after 9 p.m. daily.
- Despite this, half (49.9%) strongly supported having the option to view/listen to content themselves rather than the website filtering and removing.

(Source: Quantitative Phase)

## Online protection attitudes and perceived importance



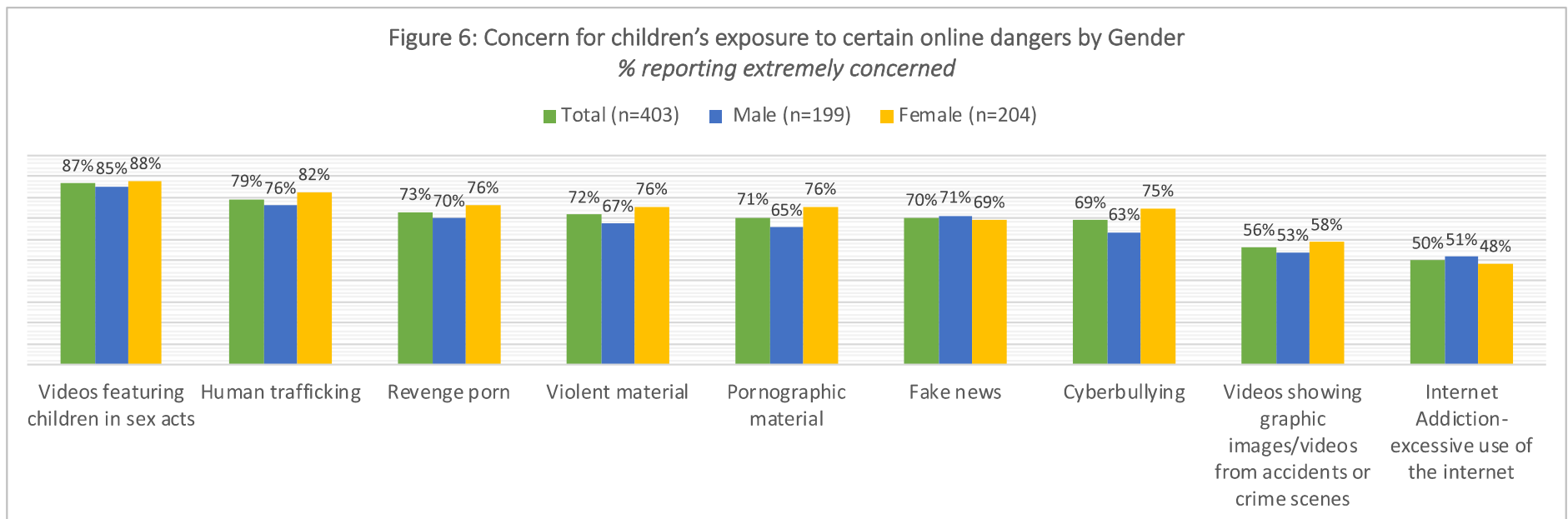
- There was also strong support for online protection measures.
- More than 8 in 10 persons expressed that it was very important that regulation exists to protect viewers online (79%), tools such as parent controls be utilized (77.4%) and information about content on a website be provided before viewing (70.7%).
- Most also described blocking or censoring some websites (57%) as very important.

*(Source: Quantitative Phase)*

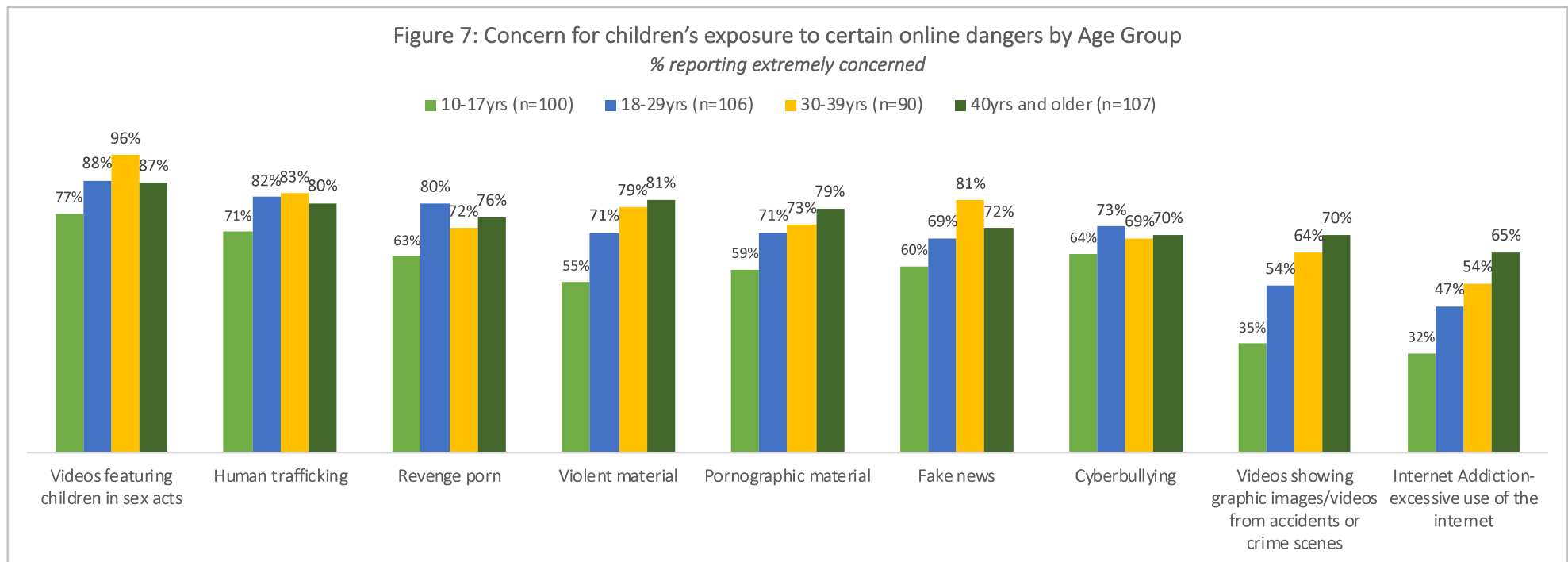
## Concern for Children’s Exposure to Certain Online Dangers

- The majority expressed strong concern (extremely concerned) for children’s exposure to certain online dangers. Concerns were high irrespective of respondent gender, although women tended to exhibit slightly higher concerns than men.
- Concern was highest for children's exposure to “videos featuring children in sex acts” (87%), as well as exposure to human trafficking (79%) and revenge porn (73%).
- Concern was lowest for internet addiction (50%).

*(Source: Quantitative Phase)*



## Concern for Children’s Exposure to Certain Online Dangers



(Source: Quantitative Phase)



# Response to Online Protection Methods

## Response to Protection Measures

Participants' response to three protection measures was also explored. These were:

- Standards
- Information
- Tools

- **Response to STANDARDS**

- In general, participants had a positive response to Standards:
  - *"It is good"*
  - *"It is responsible"*
- It was also thought very important:
  - *"We are protecting our kids and humans in general because some people have low self-esteem and you go on Facebook and just attack you and you say oh you know she committed suicide because she was bullied"*

### STANDARDS

These are usually applied through rules by either an official regulatory body or self-imposed rules applied by a media company who provides content.

### EXAMPLES

- Facebook now filters and removes hate speech
- Locally violent films should not be aired before 9pm
- Films with violent content must include warning of this content

## Response to Protection Measures

**INFORMATION**  
Providing viewers with information or signposting about content so they can make their own decisions on what is suitable for them and their families.

**EXAMPLE**  
*“This programme contains strong language”*

- **Response to INFORMATION:**
- In general, participants had a positive response to Information as it allowed them the freedom to choose.
  - *“You are informed, you are aware, if you want to go and watch it then...”*
- In spite of that, some participants were concerned that this protection method would only be effective if individuals had seen/heard it at the beginning of the programme.
  - *“The caution is only at the beginning”*
- The information method was noted to be not only suitable for children but also adults who did not desire to view audio-visual content with expletives or adult oriented themes.

## Response to Protection Measures

### TOOLS

Help viewers control access to content.

### EXAMPLE

*PIN protection*

*Parental Controls that filter out programmes with an 18+ rating*



- **Response to TOOLS:**

- Tools were the most preferred of the three protection methods probed, as it was seen as the most effective.

- *“...I support that. It is much more than just saying PG13...”*

- Overall, Tools were seen as important and beneficial as they effectively limited children’s access to inappropriate audio-visual content. They also gave parents more control over content their children had access to while still allowing parents/caregivers to have freedom to view desired content.

- The main concern with this method was that today’s children are extremely tech-savvy and will find ways to bypass these protection methods. As such it was suggested by a few participants that the features have double layered codes or even triple layered, making it more difficult for children to access content. However, this also has the drawback of being too cumbersome for adult users.

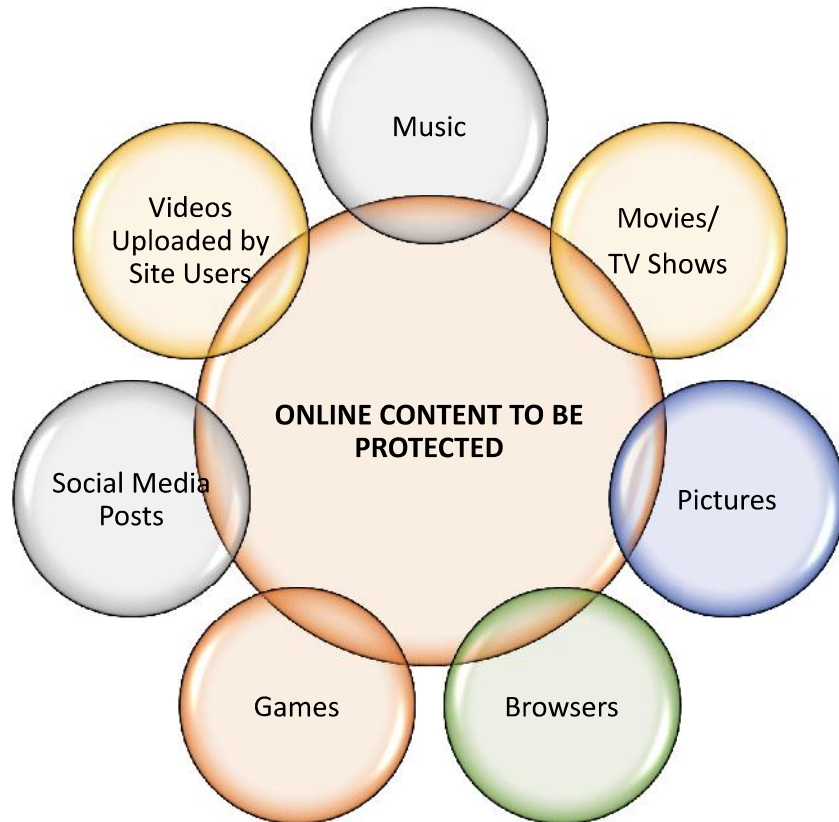
- *“...kids are smart, the more you lock them up, the more they figure stuff out.”*

## Protection for Online Content



- Tools emerged as the participants' most preferred method for online protection as it gave users more control.
- By using Tools, a parent can monitor what sites children have access to and even limit their internet use at home.
- While Tools were considered the most effective protection for most online content, Standards was seen as suitable for some online content, especially social media sites where any registered user has the option to upload content.
- However, it is important to note that these Standards must be universal and properly regulated.

## Protection for Online Content



### How do we inform Online Users of Protection Methods:

- Advertising on social media was the most commonly suggested method of informing online users of online content protection method.
- Some participants suggested using traditional means such as television and newspaper as well as other public education methods such as events in central towns.



# BROADCASTING COMMISSION OF JAMAICA

- Awareness of...
- Attitudes towards...

## Response to Broadcasting Commission of Jamaica



- Participants were generally aware of the Broadcasting Commission of Jamaica.
- They were seen largely as the body that was in charge of ratings for TV and for monitoring what was being broadcasted on local TV and radio stations.
- Many endorsed the BCJ as an important and necessary agency.
  - *“They are the TV police, if they are not there then its chaos on the TV...without boundaries people will put up anything ”*
  - *“They give guidelines. They keep stations in check. They determine the shows children can watch”*
- Participants noted that when local TV and radio stations breached the regulations they were required to issue apologies.

## Functions of Broadcasting Commission of Jamaica

- *Participants readily identified several functions of the Broadcasting Commission of Jamaica. Below are the top of mind functions of the BCJ:*

*"Punish breaking of regulations"*

*"Make stations do public apologies"*

*"...Set guidelines for TV programmes"*

*"Advertise ratings"*

*"Responsible for no expletives on the radio"*

*"Censor content on local TV and radio stations"*

*"Ensure [artistes] are properly compensated for their work"*

- The high awareness and support for the BCJ and its responsibilities were further confirmed in the survey phase.



## Awareness and Knowledge of the role of the BCJ

- The majority (90%) of respondents reported being aware of the BCJ. Of those aware 71% were able to correctly identify the role of the BCJ as being to monitor and regulate electronic media, broadcast radio and television.

Figure 8: Total awareness of the BCJ  
(N=403)

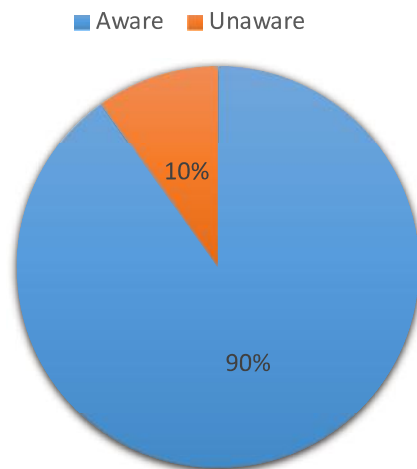
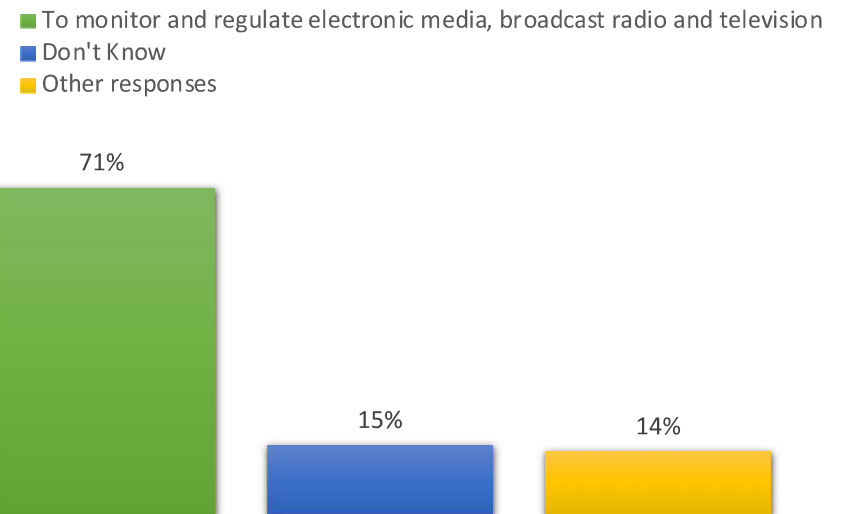


Figure 9: Knowledge of the role of the BCJ  
(n=363)



(Source: Quantitative Phase)

## Attitudes to the BCJ

- There was strong support for the BCJ with many (45%) strongly endorsing the commission on almost all attitudes probed (12 to 13 of the 13 attributes probed).
- There was also strong support for the BCJ as appropriate and capable of providing information on online dangers and protections.
- The BCJ was endorsed most for being relevant (79%), needed to monitor what is being broadcast (81%) and doing important work (77%).
- As it relates to digital media, the BCJ was strongly endorsed as being an entity which should educate the public on how to protect themselves and their families online (82%), capable of educating the public about protections for audiovisual content online (70%) and doing a good job at educating the public on the dangers of the internet (73%).

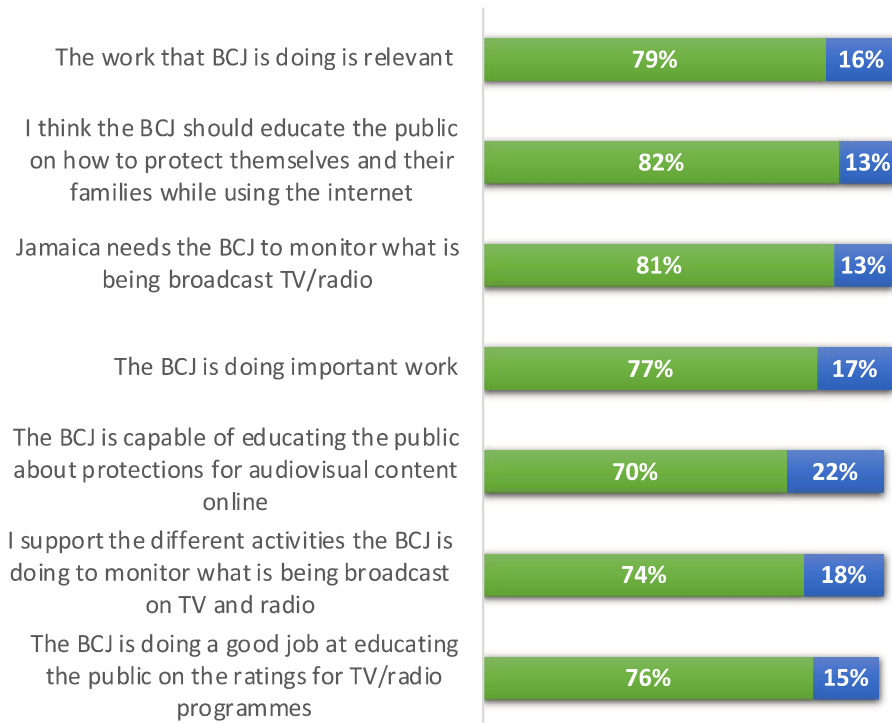


*(Source: Quantitative Phase)*

## Attitudes to the BCJ- “Strongly-Somewhat Agree”

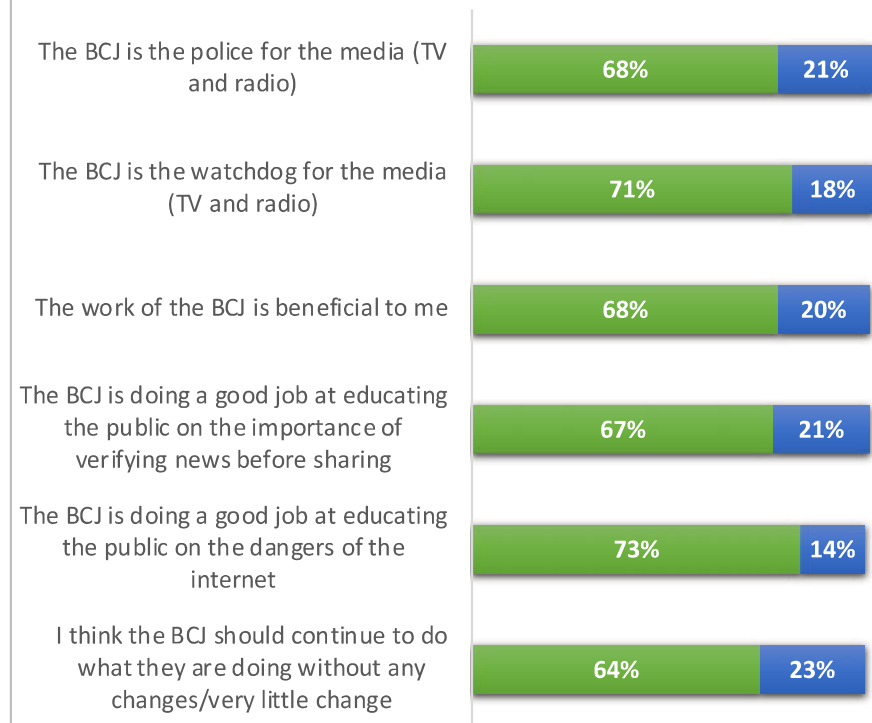
**Figure 10: Attitudes to the BCJ**

■ Strongly agree ■ Somewhat agree



**Figure 11: Attitudes to the BCJ (cont'd)**


■ Strongly agree ■ Somewhat agree




(Source: Quantitative Phase)

## Suggestions

- While participants acknowledged that the BCJ is doing a good job, it was suggested that they needed to do more so that they can be more effective.




- More severe penalties to dissuade broadcasting companies from breaking rules *“Too many people are apologizing”*



- Do more advertising (online and other media)



- Monitor content being played in public spaces such as public buses and taxis.



- Ensure TV programmes, including cartoons, are properly rated. Participants indicated that they have seen G-rated programmes with adult themes.



## Response to Proposal to Report Online Content to BCJ

- There were mixed responses to BCJ acting as the intermediate agency between website owners and users.
- Some participants were of the belief that using BCJ as an agency to act on their behalf would lengthen the time it takes to remove inappropriate content. If websites already have an option to report, the BCJ would be redundant.
- However for websites that do not have the option to report content, the BCJ would be a viable option to act on users behalf reporting and following up on inappropriate content.
- Some participants liked the fact that they would have a local agency that they could easily contact acting on their behalf.
- Many participants questioned the capability of the BCJ to handle that task.



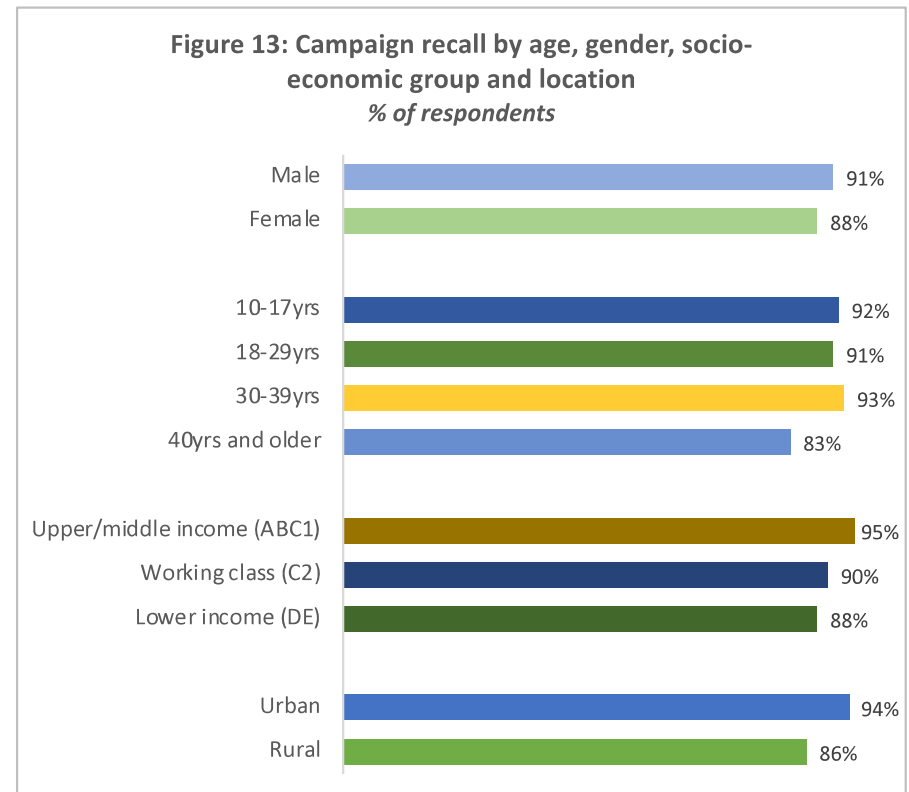
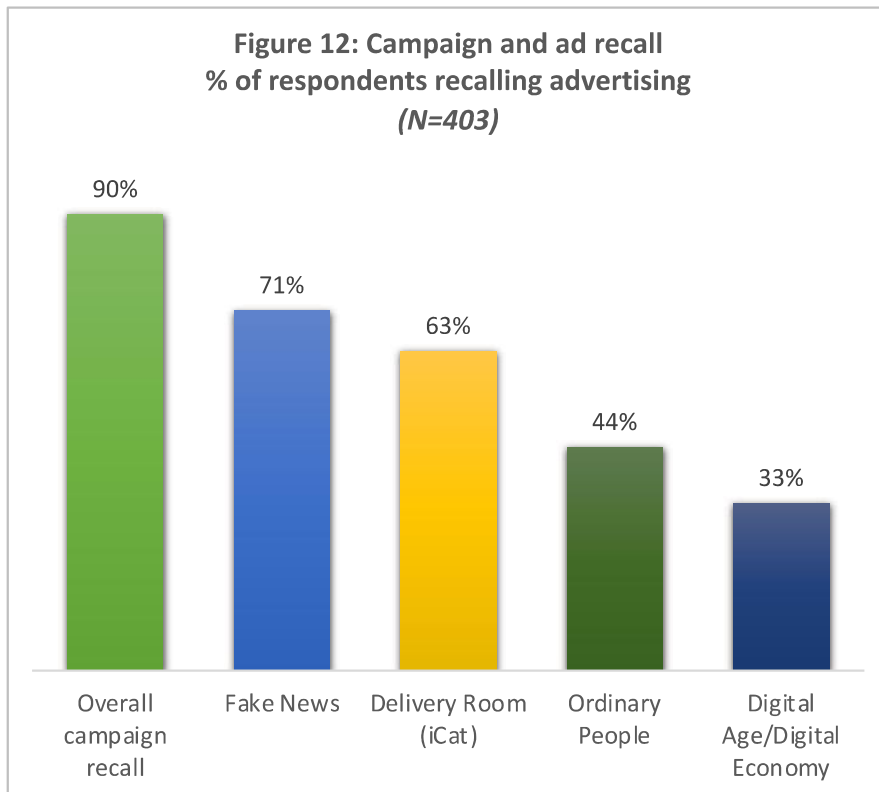


## CAMPAIGN AD RESPONSE

## Total Campaign Ad Recall

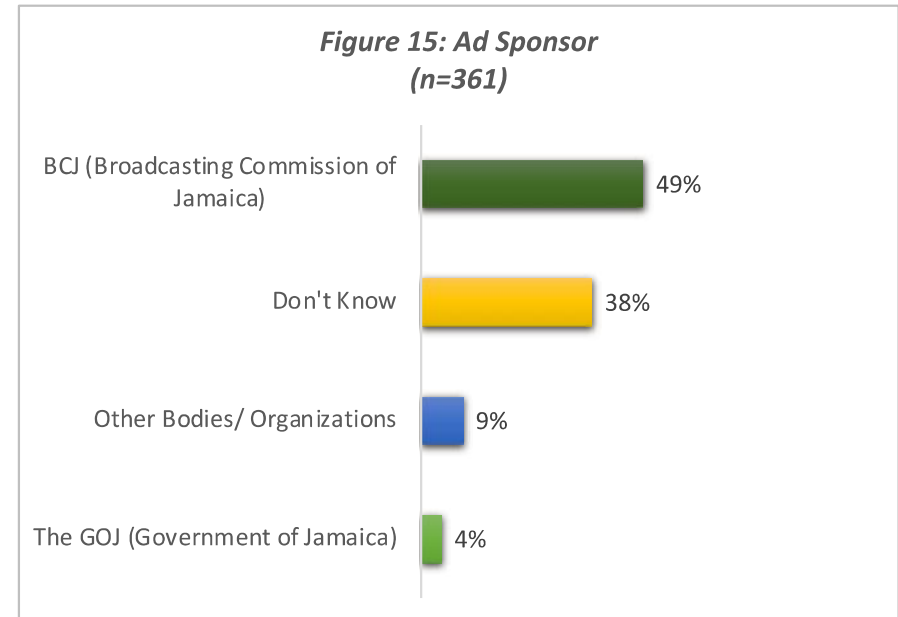
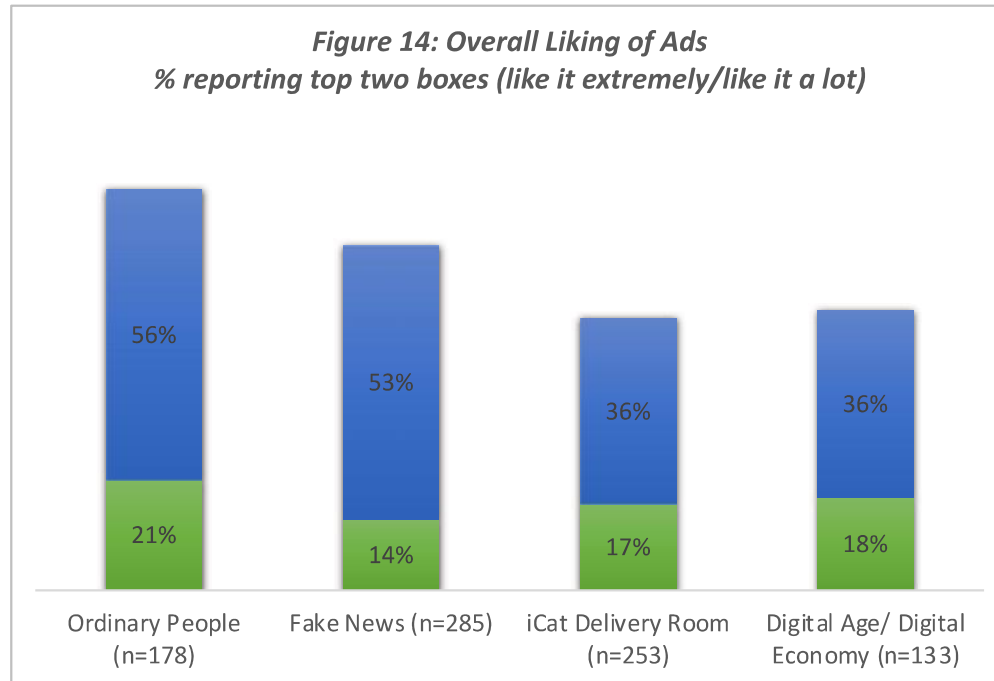
- The majority (90%) of respondents reported seeing at least one of the 4 ads comprising the campaign.
- The ads most recalled were “Fake news” followed by “iCat Delivery Room” at 71% and 63% respectively.

*(Source: Quantitative Phase)*



## Ad Rating- Overall Liking (Score 8&9)

- “Ordinary People” (77%) and “Fake News” (67%) were the advertisements most liked and were rated the highest for overall liking.
- There was wide spread awareness of BCJ as the campaign sponsor. Approximately half (49%) of those recalling the campaign correctly identified BCJ as the sponsor of said campaign.

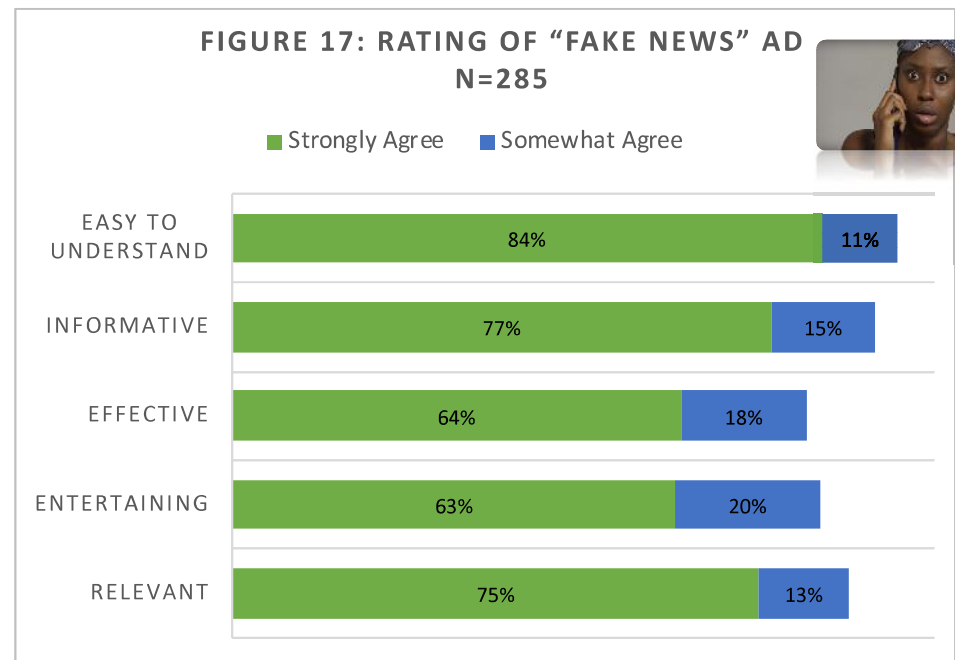
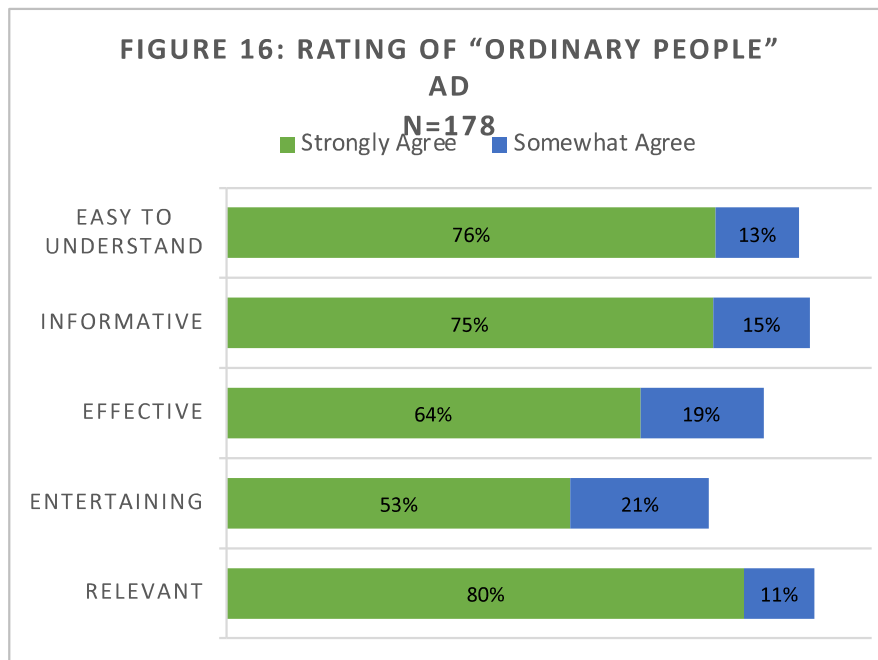


(Source: Quantitative Phase)

## Advertisement Rating - Ordinary People and Fake News

- Respondents generally rated each ad highly in terms of being relevant, entertaining, effective, informative and being easy to understand.
- “Ordinary People” was endorsed most for being relevant (91%), informative (90%) and easily understood (89%).
- “Fake News” was endorsed most for being easily understood (95%), informative (92%) and relevant (89%).

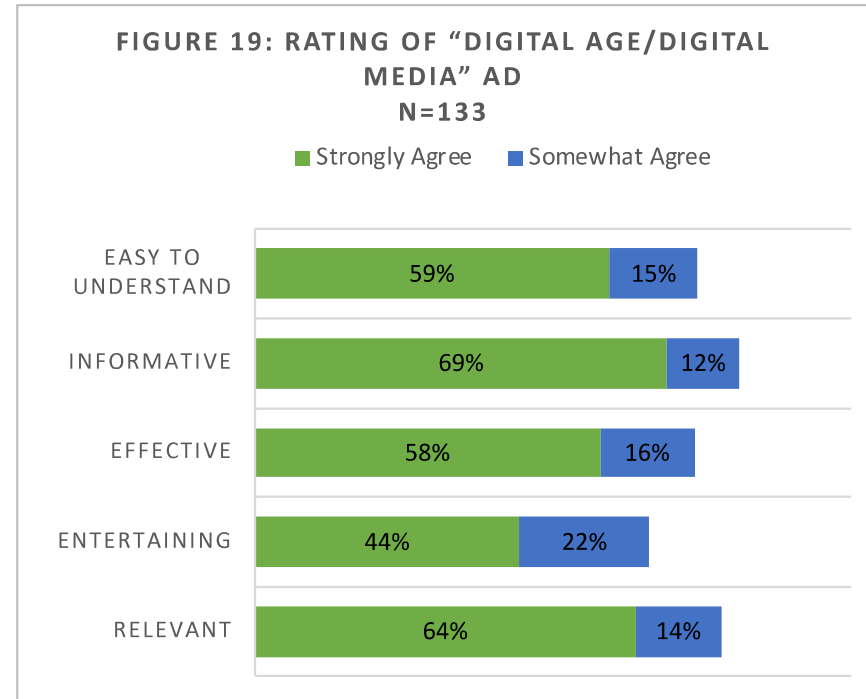
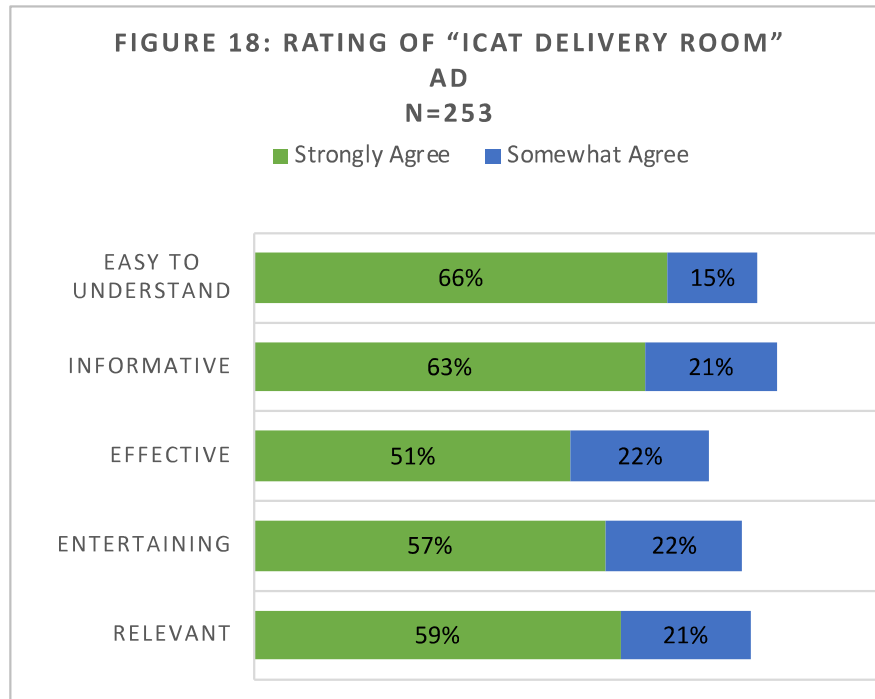
*(Source: Quantitative Phase)*

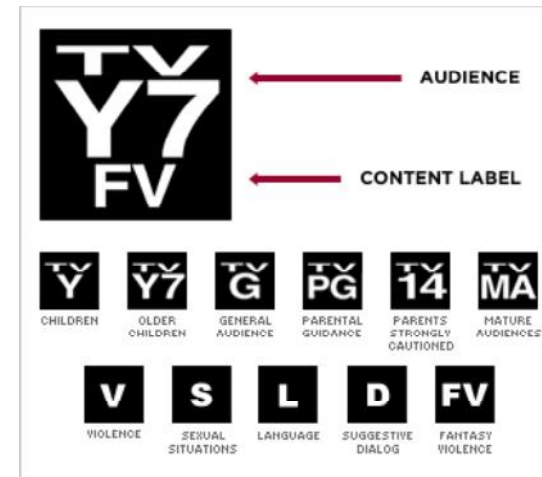


## Advertisement Rating- Delivery Room and Digital Age

- iCat Delivery Room was also rated highest for being informative (90%), easy to understand (81%) and relevant (80%).
- Similarly, Digital Age/Digital Media was also rated highest for being informative (91%), relevant (80%), easy to understand (74%) and effective (74%).

*(Source: Quantitative Phase)*

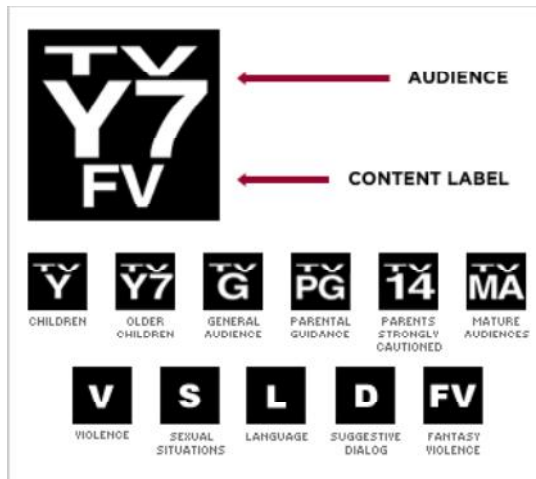




# PUBLIC AWARENESS, ATTITUDE AND APPLICATION OF PROGRAMME RATINGS

## Rating Support Score

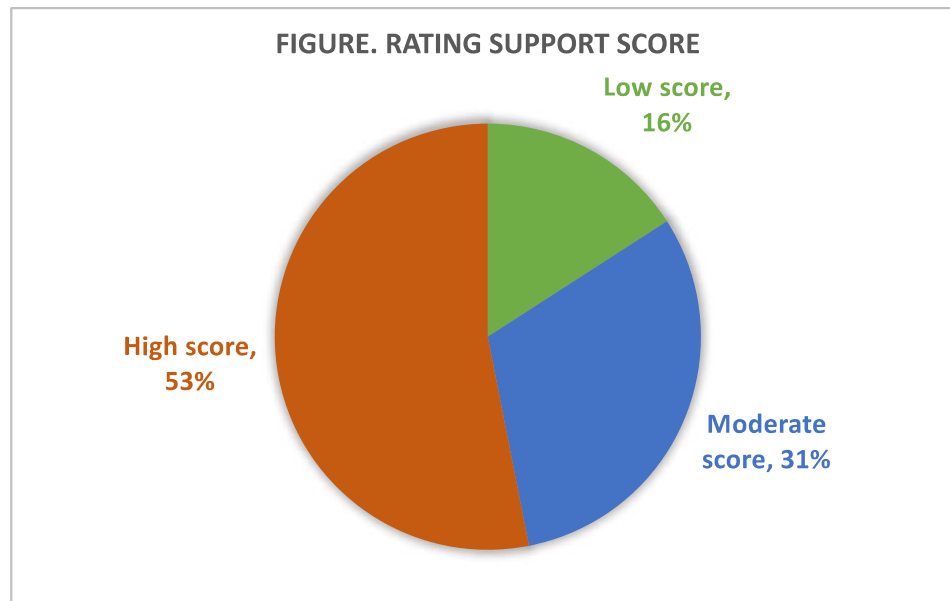
- Overall support for programme ratings was measured through a combined score. This score comprised the following:



- I am generally aware of the ratings of the TV shows/movies I watch. (strongly agree)*
- I really decide if a show is suitable for myself, my children or others to watch based on the **PREVIEW** of the show (strongly agree)*
- I generally decide if a show is suitable for children to watch based on the **RATINGS** of the show (strongly agree)*
- I understand that I need to be there to guide my children during a PG rated show (strongly agree)*
- I have/would use the ratings of programmes to decide if my child should watch the programme (always)*
- How important would you say it is for programmes to be given ratings (very important)*
- How much do you agree or disagree that the programme ratings make a difference and influence what parents allow their children to watch (strongly agree)*
- How much do you agree or disagree that children understand the ratings and obey them (strongly agree)*

*(Source: Quantitative Phase)*

## Rating Support Score



- Over half of the respondents had a high Rating Awareness score.
- This indicates that the majority of the respondents interviewed were aware of, and could correctly identify and explain the programme ratings system.

**Rating Awareness Key:**

**Maximum Score 8:**

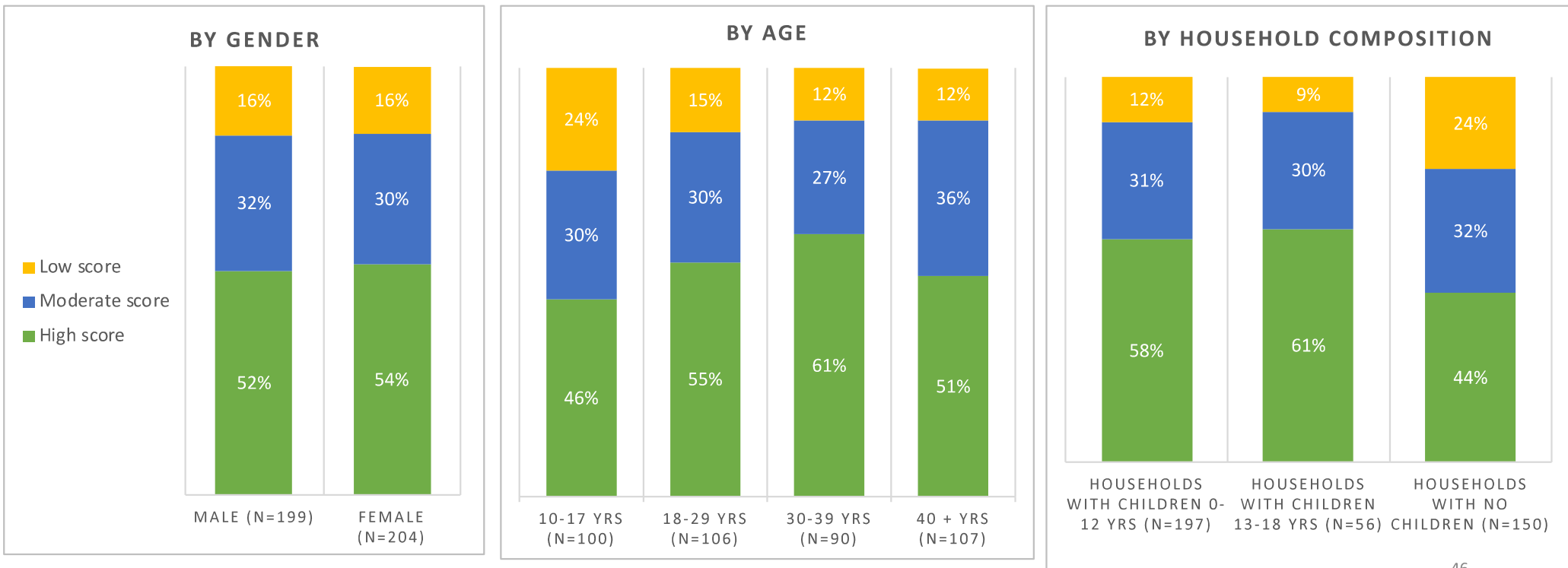
- **High** (score 7-8)
- **Moderate** (score 5-6)
- **Low** (score 0-4)

*(Source: Quantitative Phase)*

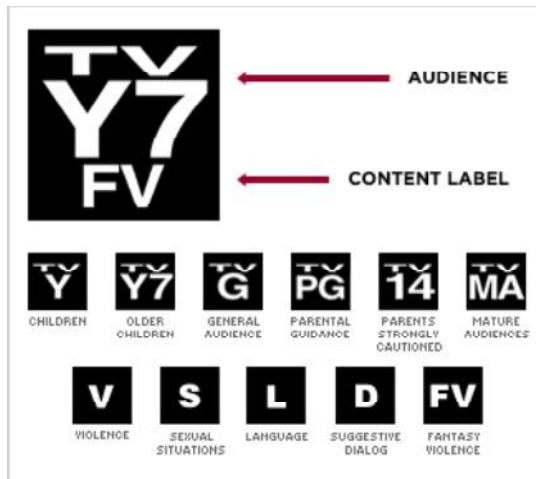
# Rating Support Score

- Support for programme ratings was similar among males and females.
- Support for ratings was highest among those 30-39yrs old (61% High support) and among households with children 0-12yrs (58% strong support) and 13-18yrs (61% strong support).

*(Source: Quantitative Phase)*



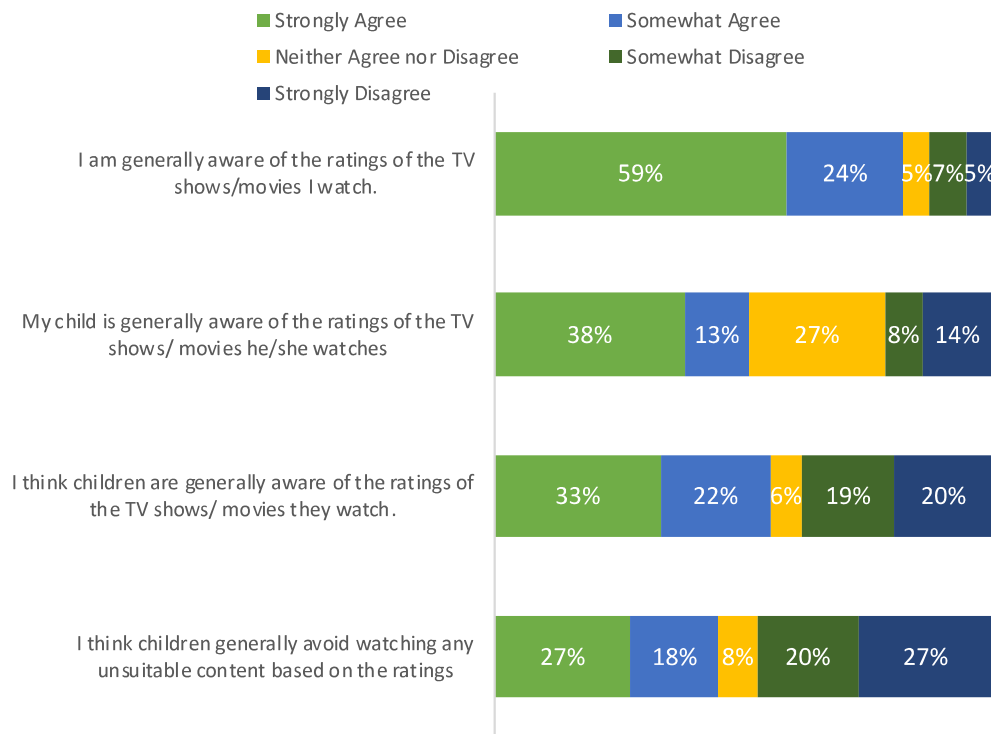
## Programme Ratings Support



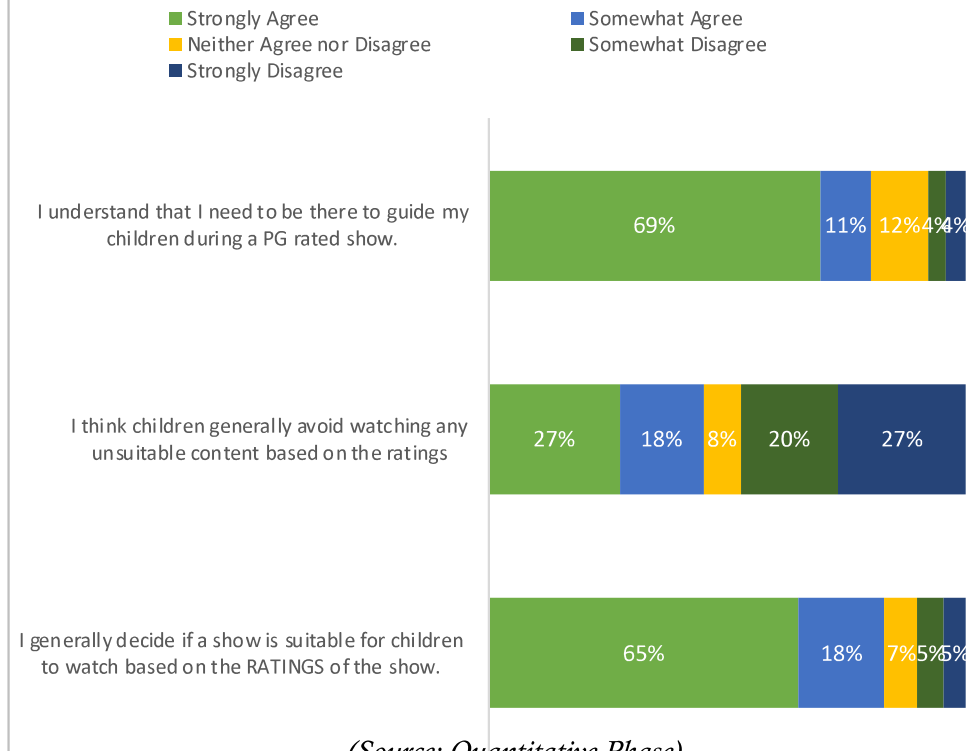
- Overall, respondents reported high awareness and consideration of the ratings.
- Most respondents strongly endorsed that they were aware of the ratings of TV shows and movies watched (59%) and they understood that they needed to be there to guide children during PG rated shows (69%). *(Figures 22a & 22b)*
- A third also affirmed that they used ratings to guide decisions on suitability of shows for children (65%). *(Figures 22a & 22b)*
- Programme ratings were endorsed as very important by the vast majority of respondents (82%). *(Figure 23)*
- Additionally 9 out of 10 persons agreed that the ratings given to a show would influence whether or not parents would allow their children to watch it. *(Figure 24)*
- When asked if they believed that children understood and obeyed the ratings, just over 54% agreed to this statement. *(Figure 25)*

# Rating Support

**Figure 22a: Level of agreement with rating statements (n=403)**



**Figure 22b: Level of agreement with rating statements (n=403)**



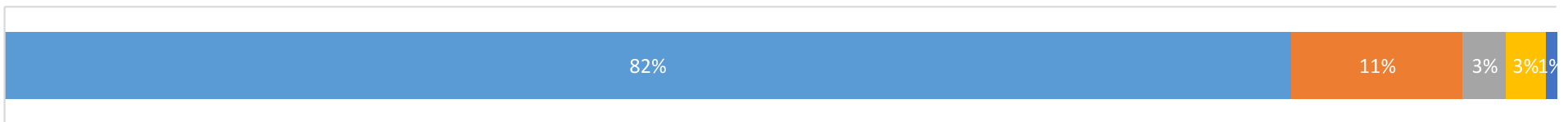
(Source: Quantitative Phase)

# Importance of rating Programmes

(Source: Quantitative Phase)

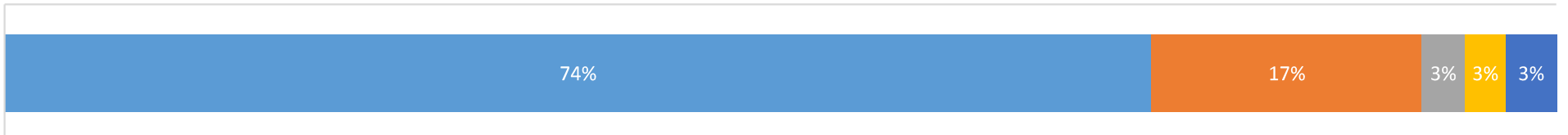
**FIGURE 23: IMPORTANCE OF GIVING PROGRAMMES RATINGS (N=403)**

Very Important    Somewhat Important    Neither important nor not important    Somewhat not important    Definitely not important



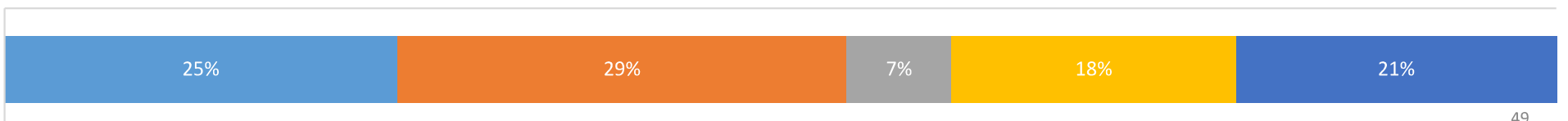
**FIGURE 24: RATINGS INFLUENCE OF WHAT PARENTS ALLOW CHILDREN TO WATCH (N=403)**

Strongly agree    Somewhat agree    Neither agree nor disagree    Somewhat disagree    Strongly disagree



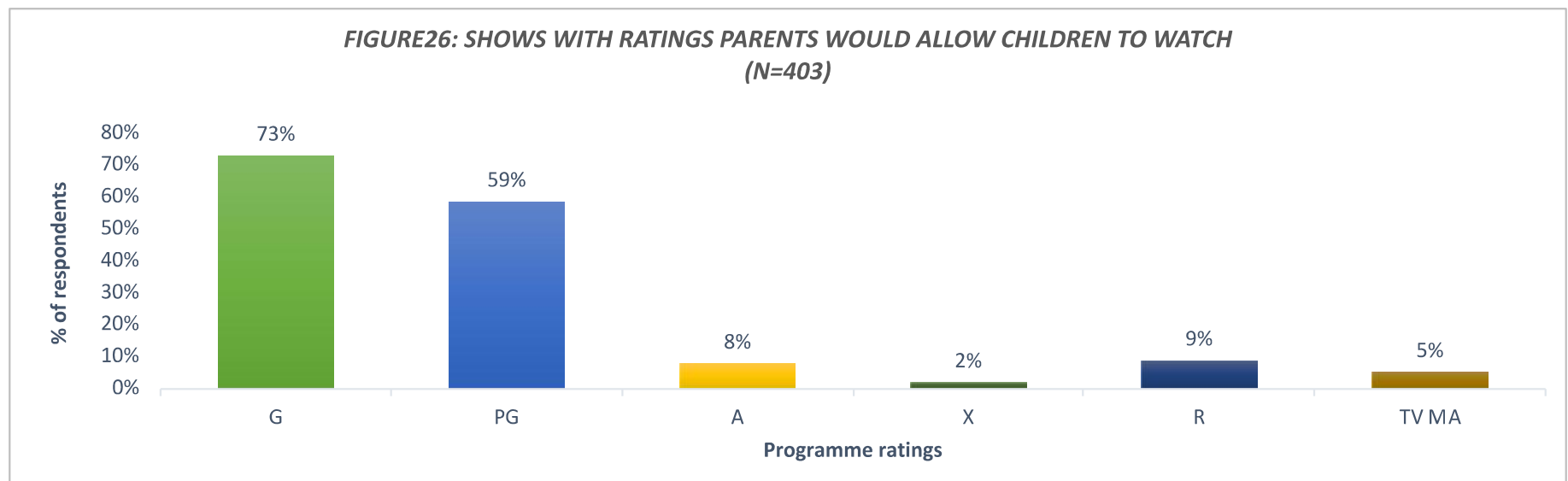
**FIGURE 25: CHILDREN UNDERSTAND AND OBEY THE RATINGS (N=403)**

Strongly agree    Somewhat agree    Neither agree nor disagree    Somewhat disagree    Strongly disagree



## Shows with ratings children would be allowed to watch

- Most displayed correct knowledge of the programme ratings.
- Specifically, most stated that shows with G (73%) and PG (59%) ratings were ones they would most allow their children to watch



*(Source: Quantitative Phase)*

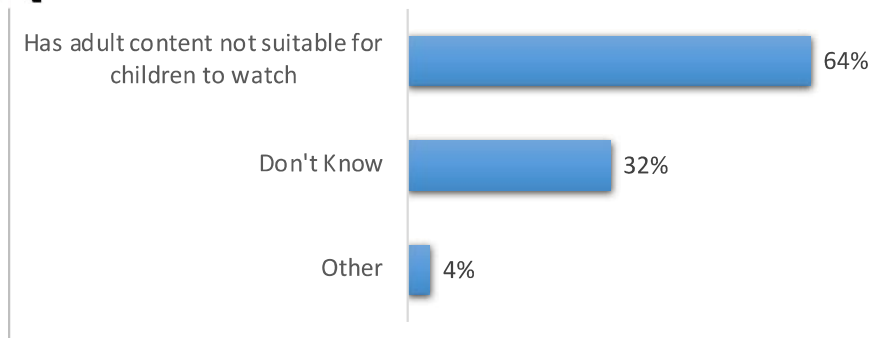
# Knowledge of what each rating means

Generally, respondents were able to explain the meaning of the ratings used by the BCJ. Most respondents knew what PG, X and A ratings were, however just under a half were able to correctly identify the meaning of the “G” rating.

*(Source: Quantitative Phase)*

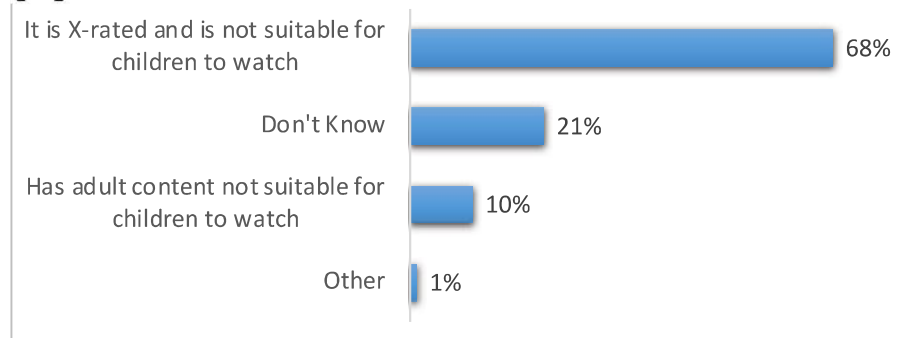
**A**

**Figure 27a: Knowledge of what “A” rating means**



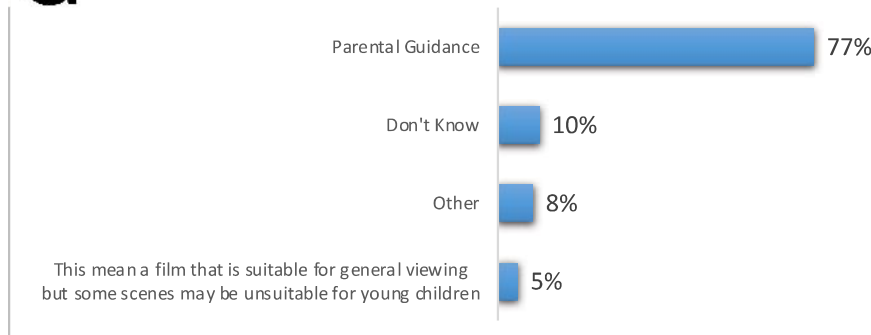
**X**

**Figure 27b: Knowledge of what “X” rating means**



**TV PG**

**Figure 27c: Knowledge of what “PG” rating means**



**TV G**

**Figure 27d: Knowledge of what “G” rating means**

