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Assessing the market for motion graphics in Jeddah, Saudi Arabia

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Assessing the market for motion graphics in Jeddah, Saudi Arabia

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Motion graphics, as a field, has been developed and utilized most in Western broadcast television markets. As an attention-grabbing device, and as a means to communicate information, it appears in all aspects and modes. The Western markets value these techniques, and how they support the promotion of products and the understanding of complex, multi-layered information in relatively short amounts of time. This research demonstrates a deficiency in the utilization of these techniques in the Middle Eastern market, especially in Jeddah, Saudi Arabia, through a content analysis of television commercials and public service announcements created and aimed at the region and through interviews with well-known advertising firms and how the Jeddawi audience responds positively to, and would benefit from more application of motion graphics in local television commercials and public service announcements based on audience testing. This translates to the logical need to broaden the Jeddawi advertising production firms’ repertoires to include more motion graphics in local advertisements and television spots, and hence, to open up their ranks for more design professionals knowledgeable in this field. This research only identifies the gap in the market.

Key words: Motion graphics, graphic design, Saudi Arabia, Jeddah, employment, market demand.

INTRODUCTION

Motion graphics as a field suffers from a lack of clear definition. One definition from triplet3d.com (2013) is, “motion graphics...is any graphics that use technology to create an illusion of motion, transformation, or rotation in order to communicate messages through video and audio storytelling”. Another from a dissertation by Scott (2011), is a mere working description of motion graphics as, “...a hybrid medium that utilises design and formal content to communicate graphical, moving image solutions”. Cole (2008) supports such broad unsettled definitions because, “...it encourages the term to be used inclusively, in an expansive way that changes as underlying technologies evolve, and our media landscape broadens”. This study prefers to use a broad but application specific definition based on observation of, and practice within the field which is to say motion graphics is a field of animation, yet, it focuses on the creation of icons, logos, text, characters and graphics that appear to move. This puts many of the aspects accepted as motion graphics in the realm of graphic design forms and techniques. One most likely observes motion graphics while watching broadcast, satellite and cable television – transitions, channel logos, on-air program listings and within commercials for products and services as well as a variety of public service.
announcements.

The fact that the practice of motion graphics is typically within the expression of advertisements marries it even further to graphic design.

In regards to motion graphics use in Saudi Arabia, television started in 1964 with the government-run Saudi One (religious programming), Saudi Two (English language programming), Al Riyadhah (sports) and Al Ekhbariyah (news). All program content was limited to family entertainment, internal and religious content (BBCnews.com, 2015). There was no advertising until 1986 (pressreference.com, 2016) The majority of the populace had neither the access nor the interest for television as Saudi remained a mostly rural country well into the 1990’s with governmental spending being focused on basic communications and transportation infrastructure development (countrystudies.us, 2010, saudiembassy.net, 2013) with few foreign goods available until the mid-1970’s, and little foreign commercial investment until 2005 (worldfacts.us, 2008).

Introduction of the Arabsat satellite system in 1985 with the goal of “connecting Arab societies and the world by providing reliable telecommunications services in harmony with Arab values and culture” (Arabsat.com, 2014) led to access to channels from other Arab countries and also, some Western channels. However, according to State, Society and Economy in Saudi Arabia, edited by Niblock (1982), the Saudi religious powers were always consulted in regards to programming including commercials. This tight censorship by the Saudi Ministry of Culture and Information, and that satellite television not being commercially viable in the Kingdom until the early 1990’s (BBCnews.com, 2015) has made media proliferation, and airing slower than the rest of the Middle East and the North Africa region (MENA). Consequently, television commercials slowly started to appear in the Middle East starting with advertisements for local products. Motion graphics’ use appeared later, and even more slowly.

However, the country has come a long way from those first governmentally-run channels (Long, 2005), and since cinemas are not allowed, television and cyberspace (excluding websites and channels blocked by the Ministry of Culture and Information and videos with copyright content or regional restrictions) have become the most viewed media platforms for entertainment and information reaching 60% of the population with the most recent access including up to 400 digital satellite channels and broadband internet access (Arabsat.com, 2014; Kraidy, 2008). The Saudi market has been catching up to the Western by leaps and bounds in the last few years.

The use of motion graphics over regular video (no moving graphic elements) has benefits with audience attention span and complex information retention. If a message needs to be communicated or a product sold, use of motion graphics will help that goal due to the nature of the contemporary audience needs and desires (Ayed, 2013)

This growth is primarily driven by the 40% of the Saudi population which is under 15 years of age, and the fact that the median age of a Saudi citizen is 21.4 years old (worldfacts.us, 2014). The newer generations are more culturally accepting of all forms of media. They have grown up with modern, developed concepts and use of media, television and the internet with 73.4% of the population having internet access in 2014 (internetlivestats.com, 2014).

In expectations, they are just like any Western audience demanding the newest, best, fastest, most entertaining technology and content (Ayed, 2013). This leads to the need to assess the market for motion graphics in Jeddah to demonstrate an existing void and project a long term need for more professionals trained in this field.

Brief history of the motion graphics field

In order to assess the field of motion graphics, a general history of the key technical developments, and usage of the techniques in a commercial way is necessary. It is also, important to note all major development milestones in the field were instigated by American designers and media, and so put into use in the American television market first and this market stayed in the primary market within the subsequent 40 odd years (1941 to 1981).

It is important to note that television, at the beginning, was very different than it is today. Many of the visuals and content contemporary viewers receive daily did not exist in this early stage, especially use of motion graphics, though animation had been around since the early 1900’s (Meggs and Purvis, 2012).

Motion graphics was first employed on-air by the Columbia Broadcasting System (CBS, 2015), one of the American television stations begun with the advent of commercialized television in the 1940’s (Britannica.com, 2015; Meggs and Purvis). CBS’s art director in 1945, William Golden alongside designer, Georg Olden developed and applied the first on-air station logo in 1951. It was very different from the more text driven designs of other logos. It was a clear static graphic mark used in broadcast, and all branding situations in which instant comprehension was necessary. It was an onscreen identity, so viewers could easily distinguish which station they were watching. Golden’s philosophy design was “something to be communicated to someone” (Meggs and Purvis, 2012) is apparent in Olden’s “eye in the sky” symbol.

However, in the 1960’s, John Whitney, Sr., an artist in the budding field of computer generated imagery, was given the first artist’s residency with International Business Machines (IBM), in order to further his experiments which produced digital, mathematically-based moving graphics (siggraph.org, 2010). At the time,
his experiments were mainly adapted to film usage. (siggraph.org).

A major breakthrough in motion graphics use occurred in 1981 with the logo for the cable television channel MTV. This logo was similar to the CBS eye in its function as an air-on identifier, and branding element incorporating a graphic symbol (though with a main text component) with one major difference: it was dynamic (frankolinsky.com, 2013, aiga.org, 2014). Pat Gorman, Frank Olinsky and Patti Rogoff of Manhattan Design developed the first animated logo (frankolinsky.com, 2013; Meggs and Purvis, 2012). Many animated permutations of the logo appeared during broadcast, and these were given dedicated 10-second animated segments. Each animation was significantly different to the last, only the dominance of the ‘M’ and the placement of the ‘TV’ stayed consistent (Meggs and Purvis).

After MTV’s breakthrough, motion graphics use skyrocketed in Western broadcast television; being used for all contemporary purposes in various styles (Meggs and Purvis, 2012).

METHODOLOGY

History of motion graphics in Saudi Arabia and MENA

The history of motion graphics use in the Middle East is less well-documented with few (if any – this research does not extend to this aspect) original contributions, just application.

Instead of turning to rare and incomplete written accounts, this research conducted an online content analysis of television commercials and public service announcements from Saudi Arabia dating from the late 1980’s/early 1990’s to 2014. Such content analysis which aims to survey types of visual content within commercials has been successfully used to demonstrate use of specific techniques and content (Bush et al., 1983; Calcott and Lee, 1994) in earlier commercial content studies and was applied in the context of the Middle East by Amini et al. (2014).

However, all of these studies were analyses of advertising aired on contemporary-at-the-time television, were looking for very specific content (for example, animated spokes-characters; not just animation), and done in recorded time blocks. The content analysis here, takes advantage of the video sharing website YouTube.com, which through various users, offers a significant library of no-longer- aired commercials as well as contemporary commercials. The start date was chosen due to the fact that the late 1980’s/early 1990’s is the earliest year of commercials accessible through internet video sites and archives. The commercials were assessed based on the fact that they were for Saudi Arabian companies, and if they were aired in Saudi Arabia during the analysis dates. Commercials were either noted to have motion graphics content or not.

This preliminary survey of 80 Saudi television commercials and public service announcements makes it evident that Saudi Arabia has had a late start in motion graphics but the late entry into the use of motion graphics does not affect the fact it is now a quite promising technique. With the number of internet users rising to 11.4 million people (Saudi.gov.sa, 2015) and claims of OSN, a Saudi owned satellite television service, as Saudi being the single biggest market in the MENA region, the demand and the market for motion graphics is just starting to grow. Currently, the media market is booming in the Middle East. Cabsat, a leading industry platform for broadcast, production and content delivery for the MEASA region (Middle East, Africa and South Asia) has projected a 50% growth from “$16 billion in 2014 to $24 billion in 2019.” (Communicateonline.me, 2015).

The internet is bursting with new you-tubers and Western programs that Saudi youth love to follow. This access to the world has led the young generation to be familiar with the current industry trends in motion graphics including: stop motion, time lapse, kinetic typography and animated titles. The concept is no longer foreign to the market but it is still new as is seen in the number of very recent TVCs and PSAs currently being aired on air and on the net.

As mentioned earlier, television was government owned and operated up until 1985 therefore, there were no commercials prior to this year aired in Saudi and the channel on-air identifications did not have any motion graphics. After the introduction of the Arabsat channels in 1985, television commercials slowly started appearing but all of them were video or traditional animation; none had motion graphics in them.

Entering the 1990’s with commercially viable television channels, there is strong continuous growth in the number of commercials airing in the Saudi market but only one in seven television commercials had basic 2D or 3D animation of company or product logo. This includes a number of Western products, namely: Silvikrin, Braun, Cerelac, Bounty, Head and Shoulders, Lipton and Tide. Of all of these, Tide was the only one to use 3D animation (3D model of Saudi Arabia transitioning into a rotating 3D model of TIDE). In 1995, Saudi Airlines produced a promotional video which followed the film style with great cinematography but no motion graphics.

From years 2000 to 2005, more commercials included basic logo animation at the end with either a sheen or a distortion of the logo. Al Safi was exceptional in their use of 3D animation during these five years. Out of the six commercials observed for Al Safi, four had 3D animation in them. In 2003, the Saudi One channel changed their on-air identification to 3D animation, ten years after their first archived on-air identification.

Yet, in 2007, Saudi Two channel changed its identification to match the trend at the time in the rest of the world by creating a 3D animation of its logo to celebrate its 40 year anniversary. Also, the first use of text animation was noted in a Saudi Gazette commercial. However, it isn’t until 2010 that motion graphics, 2D and 3D animations, started to be used for more than just an obligatory logo animation at the end of commercials.

Saudi Airlines, the country’s national carrier, had a slow entrance into the use of motion graphics. The aforementioned 1995 promotional video was 100% video, and this was consistent until 2010 when their tact changed to a video with visual effects and 3D compositing techniques with an Arab horseman riding through different countries racing with a silhouette of an airplane. In 2012, the same company, completely immersed itself in 3D character, graphics and animated text. The video paints luxurious getaways and promises a world of comfort and luxury inside a Saudi Airlines plane.

From this point in time onwards, we see a significant number of commercials by the telecommunications sector of the country: Saudi Telecommunications Company (STC), Jordan-based Zain and Mobily reaching out to its younger audiences. The commercials are fresh, energetic and have limited but eye-catching motion graphics.

RESULTS

From the aforementioned observations and analysis, it is clear that the introduction of motion graphics in the Saudi market’s television commercials and PSA’s is widely accepted and utilized as of 2012. Currently, every TVC and PSA has motion graphics as either logo or text animation. This preliminary survey of 80 Saudi television
commercial and public service announcements makes it evident that Saudi Arabia has had a late start in motion graphics but the late entry into the use of motion graphics does not affect the fact it is now a quite promising technique. With the number of internet users rising to 11.4 million people (Saudi.gov.sa, 2015) and claims of OSN, a Saudi owned satellite television service, as Saudi being the single biggest market in the MENA region, the demand and the market for motion graphics is just starting to grow. Currently, the media market is booming in the Middle East. Cabsat, a leading industry platform for broadcast, production and content delivery for the MEASA region (Middle East, Africa and South Asia) has projected a 50% growth from “$16 billion in 2014 to $24 billion in 2019.” (Communicateonline.me, 2015).

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The conclusion is that motion graphics is still a relatively new trend in the Kingdom but it is catching up to the rest of the world’s practices fast.

**Audience research**

Television commercials and public service announcements are the most dependable markers to survey a change of trend in a country’s strategy to reach its market, and to see the technological advances used. Through this, it has been noticed by the researchers that the recent (last 25 to 30 years) use of motion graphics within the context of television and commercials has been applied in the United States, Australia and Europe but the Middle East, specifically Saudi Arabia, lags behind in utilization of motion graphics and yet, demand by audiences and clients for such grows based on the number of PSA’s and television commercials recently produced with motion graphic content.

The research was completed in three stages. Two of the stages were focused on television viewing habits of audiences in Jeddah; in general and as relates to a comparison of expectations, preferences and results of information retention related to watching a regular video PSA, and the same PSA given in motion graphic form. The third stage concentrated on the client demands of three professional design firms as relates to preference for motion graphic message content. This is discovered through interviews with the supervisors of the three professional design firms and the reporting of how many projects in which motion graphics students from Dar Al Hekma University, in Jeddah, who interned in reputed professional design firms with offices located in Jeddah, were asked to produce with motion graphic content over purely graphic content.

All three stages of research were conducted in order to explore, firstly, if the audiences residing in Jeddah are responsive to, expectant of (to some degree) and demanding of motion graphic content in television commercials and public service announcements more than regular video and secondly, that professional design firms are possibly being tasked to create such content more than in the recent past; that such content has moved from being a novelty and closer to the norm. All results were quantified and extrapolated into a statistical breakdown in regards to the surveys, quantified into decimals for the focus group responses and the professional design firm responses were just correlated to the results of the previous two methods.

**DISCUSSION**

A survey inquiring on the viewing habits, and preferences of a cross section of 200 (100 male/100 female of all ages) viewers in Jeddah, Saudi Arabia produced results (Graph 1) that indicated:

1. A strong concept is the first element that will catch the target audience’s attention when viewing a new commercial.
2. Use of animated content comes in second followed by music. However, in males, music and animation both tie for second place.
3. Useful information and talent appearing therein are considered last by the target audience in regards to attention-grabbing elements.

This information draws a clear change of approach to marketing, and advertising in today’s technologically pervasive world. Target audiences are not looking for information or products but the marketing only leads the people to watch and attract them proving the AIDA method of advertising in Saudi Arabia (AIDA is an acronym for Attention Interest Desire and Action. It is a marketing communication model that explains the four stages a consumer experiences before making a purchase).

A secondary result of the survey highlights another crucial aspect, which are the consumer viewing habits in Jeddah. 99% female respondents browse the internet, and watch internet based content in their leisure time and 78% watch television. 95% of the male counterparts browse the internet, and 83% view television. Also, the percentages of the female audience who will pay attention to an entire commercial break on television without changing the channel is 20.20%, and if the commercial is new the number jumps to 28.28%. The male audience is more fickle in their habits with only...
7.61% attentively watching an entire commercial break but 17.39% would attentively watch a new commercial. Graph 2 makes it evident that concept is not only the main criterion to catch the initial attention of the target audience but it holds their sustained interest (70% respondents would watch a commercial with a good concept between 1 and 3 times); music would convince 29.9% of respondents to watch a commercial or PSA more than once; followed by animation at 25.4%. Useful information comes in last with target audiences interested in information for the first viewing (as shown in Graph 2) but lose interest when watching for the second time.

Focus group data analysis

Two focus groups (Group A and B) were conducted with 7 individuals in each group, both genders were represented, and ages were 21+ from different walks of life and of diverse nationalities and backgrounds including Saudi, Pakistani, Pinoy, Canadian, American, Jordanian and Indian.

Both of the groups were shown two videos that had the same content, music and were of the same duration separately. One video was Regular Video (RV) with no motion graphics just an actress communicating facts in a learning context. The second video was an animated infographic (MG) with only motion graphics and no video. The focus group was conducted by making Group A watch the regular video (RV) first, and after watching, were presented with a short quiz, which asked multiple choice and short answer questions ranging from easy to hard and was related to the facts presented in the video (Table 1 and Graph 3). Similarly, Group A watched the animated infographic video (MG) first and then were quizzed on it afterward (see retention results in Table 2 and Graph 3). The researchers moderated discussion separately for both the groups and the two videos were compared for their effectiveness.

The logic behind this method was to measure the memory related to visuals; whether animation helped in retaining more information than just a video itself. This would demonstrate the usefulness of motion graphics over just video as a means of sending a message that the audience would remember. Moreover, the discussion would give more in depth information as to what ‘clicked’ with the audience. The percentage only focuses our attention on the impact motion graphics has on the viewers and the ability to engage and retain interest for a minimum of 5 times (Graph 4).

Focus group discussion analysis

Group A had remarks against regular video (RV) such as, it being was monotonous; the actress seemed to have
One female participant felt the video was more academic, and would be suitable for students and educators only. And pursuant to that, they said they would watch this video only once or that they would be bored. The feedback regarding their comprehension of the facts presented in the video was that their brain absorbs more information if they were able to read it as it was spoken.

Comments were given comparing the two videos with reinforcement of the best solution being to have the girl speak but have the numbers and information displayed on the screen. The regular video felt longer due to the fact the actress had to explain the information. Also, with the music MG video, the music energized the video and made it feel quicker, to the point and interesting, it was considered secondary to the presenter talking in the regular video.

As compared to Group B, who watched the MG video first and the regular video second, they responded similarly with appreciation for the music, a clear understanding of the message with the motion graphics. Group B clearly stated the graphics help them retain the information longer.

Findings from the discussion overall, were that the audience found the MG video more entertaining than the RV video and had specific preferences for the type of motion graphics demonstrating a critical eye due to experience with such techniques thus their expectation is to see motion graphics and motion graphics of good quality. The majority of the PSA-viewing audience digests information better visually with text, in combination with human talent. This presents the Jeddawi audience's demand for motion graphic elements to PSA's/commercials, and how responsive they are to such content.

**Professional firms’ needs**

Four companies: PG Intergrated, Silver Grey, Stallion -Illimite and Leo Burnett, were contacted directly or through interns to study the demand for motion graphics in the current Jeddah, KSA market.

SilverGrey reported about 40% of their client based projects are animation, and that the businesses are more open to animation including 2D and 3D. Some local companies named as clients are Almarai, STC, and Saudia. The company has an in-house animation studio and completes all animation in-house. It was also stated that there is a steady and slight increase in the demand for motion graphics by 5% per year.

SilverGrey is the first film production company in the
Kingdom of Saudi Arabia, and since being in the business for more than 10 years the company has seen the growth of motion graphics in Jeddah. It was stated that motion graphics began in Jeddah in 2010. This statement is confirmed with the general survey conducted for this paper that scanned 30 years of TV commercials and PSAs, and noted 2010 to be the year when big names like Saudi Arabian Airlines and STC began their marketing using 3D animation and stop motion techniques.

PG integrated specified that last year they had 30 to 40 projects that demanded motion graphics and they were all outsourced to local freelancers or freelancers from Behance.com. During the Dar Al Hekma summer internship period of 5 weeks, May 23th to June 29th, they had 10 projects (minor and major projects) which were all completed by the interns at the company. This number shows a large gap between supply and demand because the companies are now being approached for more and more motion graphics by clients but the projects have to be outsourced due to the lack of qualified motion graphics professionals working in Jeddah.

From the perspective of a student from Dar Al Hekma University interned at Leo Burnett, Jeddah...
during this same summer period and out of nine projects she was tasked to work on, three were motion graphics based and the other six were graphic design. There was not a single project that was solely video.

Another motion graphics student from the same university interned with a company called Stallion-Illimite. There were two projects and both were motion graphics based. One project was a video for social media. The intern reported seeing great interest from clients for Infographics (an animation based on information and statistics) specifically during her internship.

**Conclusion**

This research has shown that motion graphics content in Saudi television commercials and PSAs have grown in recent years and is on par with the global market at present. Also, motion graphics has become a major criterion to attract the initial attention of the audience and hence, successfully sell products or send information and the use of regular video alone will not intrigue viewers as much. Following this, the demand is greater than the supply and there is a dearth of professional motion graphic talent in the Jeddawi Market; to the point that most local design firms either recruit foreign non-Saudi talent to fill the need or they outsource outside of the country completely in order to meet the client demand to have motion graphics content. An obvious solution to this gap in the market is to have more universities in Saudi offering majors in motion graphics and animation. This would build the local talent for these careers and make it

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**Graph 3.** Recall rate % comparison. Group A recall rate is 38.5%; Group B recall rate is 46.5%. And the conclusion from this data is that MG video’s recall rate is 8% higher than RV video.
Graph 4. Numeric questions comparison. Group A Numeric qs recall rate - 39% (11*100/28); Group B Numeric qs recall rate - 50% (14*100/28); Finding: MG video helped in retaining 11% more numeric information than just RV video; Group A repeat value - 85% will watch the regular video minimum 1 time and maximum 5 times; Group B repeat value - 57% will watch the motion graphics video minimum 5 times and maximum 10 times.

CONFLICT OF INTERESTS

The authors have not declared any conflict of interests.

REFERENCES

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