



Mapping Jamaica's Cultural and Creative Industries

Phase 1 - Situational Analysis

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for
British Council and
Jamaica Business Development Corporation (JBDC)
by



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Executive Summary

The British Council in Jamaica, in partnership with the Jamaica Business Development Corporation (JBDC), engaged Nordicity to undertake a sector mapping and situational analysis of Jamaica's cultural and creative industries (CCIs). This study is a foundational step in Jamaica's development and support of its cultural and creative industries, building upon years of momentum and a growing confidence in the sector. This report assesses the nation's cultural and creative industries, identifying opportunities and challenges, and provides a foundation for analysing its economic and social contribution.

The research adopted a people-centred approach, co-developed with the JBDC and Jamaican CCI stakeholders, whilst adhering to established CCI mapping best practices. Throughout the process, Nordicity cultivated knowledge transfer and capacity building with Jamaican stakeholders including government, institutions, researchers, industry groups, associations, businesses, entrepreneurs, artists and creatives. Research methods included a literature review, over 50 key informant interviews, a survey of over 570 creative industry stakeholders, two roundtables with over 20 people and four webinars with over 190 participants. Fieldwork was undertaken in early 2020 before Covid-19 pandemic lockdowns. Remote consultations were undertaken through the remainder of 2020 as additional planned fieldwork was not possible due to these disruptions.

Jamaica has a rich tradition in the cultural and creative industries that has evolved in a historical context largely based on the narrative, celebration, protest and affirmation of its people, culture, and way of life. As the CCIs continue to grow in prominence, there is a growing need to measure their contribution to Jamaica's economy. According to UNESCO, Jamaica's cultural and creative industries' (CCIs) are estimated to contribute 5.2% of the country's GDP, generating revenues of JMD \$2.2 billion annually, and accounting for 3% of total employment. In the UK, the CCIs have been recognised as one of the fastest growing industries in the country, at rates of more than five times the growth of the national economy – where they generated over 3 million jobs (accounting for one in 11 UK jobs) and contributed over GBP £111 billion in GVA per year (equivalent to £306 million per day).¹

As another measure of importance, Jamaica ranks 72nd in global creativity, outperforming Peru, Argentina, Dominican Republic and Trinidad and Tobago. On the creative output sub-index, Jamaica ranked 42nd, outperforming its neighbours Mexico, Costa Rica and Panama.² With the impact of Covid-19, the sector's contribution to the economy and the nation's cultural heritage has been threatened, at least in the short term. Indeed, the CCI's have a unique role to play in the recovery, and any form of recovery will require astute and coordinated public policy decisions and stakeholder actions.

Defining the Cultural and Creative Industries in Jamaica

A broad and inclusive approach has been adopted in defining the cultural and creative industries in Jamaica. This study adheres to best practice standards and approaches by UNESCO, CARICOM and the Department for Digital, Culture, Media, and Sport (DCMS), and is localised Jamaican context. In this study, the CCIs encompass music, literature and publishing, visual arts, design, gifts and crafts, film, television and broadcast, digital media, advertising and marketing, theatre, dance and performing arts, fashion, culinary/gastronomy, museums, galleries and libraries, and cultural heritage.

Comprising an ecosystem of stakeholders, Jamaica's CCIs includes a rich tapestry of artists, employees, freelancers, entrepreneurs, companies & enterprises, associations & industry representation bodies, educational institutions, and government. The sector is represented by a growing number of industry associations, groups and societies who represent the interests of their specific CCI sectors. Government support and oversight of Jamaica's CCI sectors is administered across a myriad of ministries and departmental agencies.

¹ DCMS, 'DCMS Sectors Economic Estimates 2018: GVA', 2020.

² Ibid.

Profile of Jamaica's Cultural and Creative Industry Members

Jamaica's cultural and creative industries are comprised of a vast and varied community of creatives, freelancers, SMEs, micro-enterprises, workers and support bodies. A survey Nordicity conducted of over 550 CCI stakeholders reflected a workforce of creative business owners, artists, freelancers and workers from across the country. The survey also exhibited a small majority of females (61% of respondents), and a mix of age groups, with over one-third of respondents under the age of 35, and over one-fifth of respondents over the age of 54. The visual arts, performing arts, design and music sectors were highly represented in the survey, followed by advertising and marketing, gifts and crafts, literature and publishing, film, festivals/fairs and feasts, cultural heritage, television and broadcast, digital media and fashion.

Jamaica has the most developed music industry in the Caribbean and is the region's the largest exporter of music³, with an estimated 6,000-12,000 persons working, including 2,500 musicians and 1,700 sound system technicians.⁴

The Jamaican film industry accounts for an estimated 0.52% of national employment and 0.62% of national GDP.⁵ In 2018, 106 films were registered to film in Jamaica, bringing investments totaling JMD \$762 million, creating approx.1,600 temporary jobs.⁶ It is common to find film workers also employed in television, broadcasting, and advertising.

Jamaica's book publishing industry is a national asset and key player in the Caribbean region. In the midst of the digital revolution, the sector has navigated the challenges and opportunities shared with the international publishing industry. Home to as many as five English-language publishing houses, a sizeable pool of writers and a thriving textbook sector, the sector has developed from its grassroots with sizeable conferences and markets, and plays a role in writer development, reader development and literacy nationwide.

Jamaica's digital media sector has been emerging since the 1990s. Strengthened in recent years by increased digital literacy and wider social acceptance, the sector has been bolstered since the Covid-19 pandemic. The national electronics and media sector accounts for the country's largest segment of consumer spend on eCommerce in 2020,⁷ and Jamaica is home to some 500 eSports semi-professional gamers, 10-15 gaming streamers and 5,000 eSports gamers.

Much of Jamaica's animation sector is represented by the Jamaica Animation Nation Network, comprising an estimated 40 digital media practitioners (animators, game developers) and 300 digital media practitioners.

Jamaica's culinary and gastronomy industry is a unique cultural asset recognised for its unique role in tourism, festivals and events. The sector also plays a key role in the nation's brand and soft power, and is a source of pride for Jamaicans across the globe. The national total consumer food service sector generated an estimated JMD \$106 billion in sales in 2018.⁸ And the hotels and restaurants sectors employ 102,325 people (8.3% of the workforce).⁹ Jamaican consumers spent the most on "food & nonalcoholic beverages" of all other forms of spending in 2020¹⁰ and 20-50% of the products used in Jamaica's fast-food sector are imported, suggesting that anywhere from 50-80% of ingredients in these subsectors are sourced locally.¹¹

Jamaica's gifts and crafts sector is characterised by a large number of micro-businesses and craftspeople. Many gifts and crafts enterprises have been in operation for over 20 years, and many having been handed down over generations.¹² The economic importance and historical significance of the gifts and crafts sector in Jamaica is widely valued by policymakers, and in 2020 the government renewed its commitments to the sector with the launch of the National Craft Policy.

3 Hendrickson et al., 'Creative industries in the Caribbean: a new road for diversification and export growth', United Nations, 2012, <https://core.ac.uk/download/pdf/45619448.pdf>

4 Fleming, 'Prioritisation Paper: Development of a Business Plan for the Caribbean Creative Industries Management Unit', Caribbean Development Bank, 2016.

5 Ibid.

6 Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

7 Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

8 Grant, '2018 Jamaica HRI Food Service Sector', Global Agricultural Information Network, 2018.

9 Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

10 Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

11 Ewing-Chow, 'The Globalization of Fast Food, Public Health and Why we Should Have an Eye on Jamaica', Forbes, 2019.

12 'National Craft Policy: An Integrated Approach', Ministry of Industry, Commerce, Agriculture & Fisheries (MICAFA), 2020.

Jamaica's visual arts sector has provided Jamaicans their own narrative and affirmed their culture and way of life through painting, photography, drawings, sculpture, and street art. Globally, the visual arts sector accounts for some of the highest levels of employment in the CCIs. In many cases, the sector has relatively low barriers to entry, and can have significant crossover with the gifts and crafts and tourism sectors. Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

Jamaica's fashion industry is characterised by its distinctive style, local influences and cultural heritage. Fashion accounts for 28% of Jamaica's spend on eCommerce, the third largest revenue segment in ecommerce. Sales in fashion have grown at around 3% in Latin America and the Caribbean, outperforming North America and Europe.¹³ Within fashion, modelling is a significant element of Jamaica's fashion industry, with agencies increasingly reaching the international stage. The launch of Caribbean Fashion Week has provided further opportunities for regional models and fashion designers to strengthen their careers.

Jamaica's performing arts sector comprises members of the dance, drama, comedy, and theatre subsectors, alongside a number of commercial and community groups, church groups, and school groups. The sector is represented by commercial interests alongside a voluntary and semi-professional sector, and many supplement their income by working outside the industry.

Opportunities and Challenges in Jamaica's Cultural and Creative Industries

Jamaica's cultural and creative industries have evolved and grown from a grassroots level since before independence in 1962. A cultural awakening was revived alongside social events such as the Windrush migration of Jamaicans to the UK from 1948-1971. In this time, a number of businesses emerged bringing a layer of professionalism, infrastructure and global reach, facilitating artist and business development, taste making and global distribution. Pioneers such as Chris Blackwell played a crucial role in the identification of Jamaican talent and finding a market for it, supporting and developing the careers of Jamaican artists such as Bob Marley.

Whilst much of this activity and success was achieved independently from the creative grassroots, the global marketplace has evolved and governments around the world have been exploring approaches to support and develop their creative economies. Over the last decade, government support has increased the development of Jamaica's cultural and creative industries. Today, government support is a key feature in ensuring a nation's cultural and creative industries are operating on a level playing field with countries around the world.

Government intervention in recent years has helped to further the development of Jamaica's CCIs, and there is a need for continued and further support. Sector support can be effectively delivered through a combination of interrelated support structures, where one intervention would have a greater impact when delivered alongside others. In order to merit public support, a clear understanding of the cultural and creative industries and their cultural and economic contribution must be presented and absorbed by those in decision-making positions. To realise this objective, ongoing monitoring and evaluation can help provide the necessary information for both policymakers and industry alike.

Moreover, the CCI's are highly fragmented, comprising numerous sub-sectors and genres, many of which operate within their own ecosystem. Through sector coordination and collaboration, an empowered Jamaican CCI sector could take more control of its own development and work more closely with government, policymakers, and institutions.

The CCIs have the potential to create a high number of jobs. Much of this creative sector employment can emerge in short periods of time and absorb labour from declining sectors of the economy.¹⁴ Globally, the CCIs account for 29.5 million jobs, employing 1% of the world's active population. The top three employers in the CCIs have been identified as visual arts (6.73 million), books (3.67 million), and music (3.98m).¹⁵ Indeed, the CCIs are seen increasingly as drivers of inclusive growth and sustainable development.

¹³ McKinsey & Co., 'The State of Fashion 2020', McKinsey & Co., 2020. <https://www.mckinsey.com/~/media/McKinsey/Industries/Retail/Our%20Insights/The%20state%20of%20fashion%202020%20Navigating%20uncertainty/The-State-of-Fashion-2020-final.ashx>

¹⁴ Haans, 'Expected job creation across the cultural industries: a sectoral division and its implications for cultural policy', International Journal of Cultural Policy, 2015.

¹⁵ UNESCO, 'Cultural Times: The first global map of cultural and creative industries', EY, 2015.

Culture's unique ability of connecting people presents a unique opportunity to engage those from all walks of life. The British Council has referred to culture as 'The Missing Pillar' of sustainable development, deserving of recognition alongside the three pillars of development – social, economic, and environmental.¹⁶ Indeed, culture contributes directly to many of the UN Sustainable Development Goals (SDGs), including safe and sustainable cities, decent work and economic growth, reduced inequalities, the environment, promoting gender equality and peaceful and inclusive societies. The Planning Institute of Jamaica has noted that, given the country's relatively large working age population, its declining child population, and the effects of an aging population structure and urbanisation, "the country has the potential to reap a 'demographic dividend' providing that appropriate investments are made in human resources for social and economic development."¹⁷

The cultural and creative industries provide significant transferable skills that can support economic prosperity across sectors such as finance, tourism, and retail. Many elements of Jamaica's CCI's rely on skills obtained on-the-job, through education and training programs, or transferrable skills brought in from other sectors such as accounting, law and finance - which are critical to the success of any sector. As the world turns increasingly to automation and further technological integration, the need for skills, training, and education will continue to change – for both creative skills and business skills and delivered through formal and informal training and education.

A lack of business skills was identified as a barrier to growth and sustainability by CCI entrepreneurs in Jamaica. As the sector is comprised of many freelancers, artist entrepreneurs and micro enterprises, business skills such as financing, product pricing and negotiations are crucial. While there is a significant appetite to enhance the skills and talent pipeline in Jamaica's CCI's, affordability was the biggest barrier for survey respondents in obtaining training and education to advance skills.

The most significant opportunity for achieving growth and increased revenues identified by survey respondents was improving market development and sales (31% of respondents). Improving sector skills was considered the next most significant opportunity, including business skills (21%), creative and technical skills (16%), improving knowledge of IP and copyright (8%), and digital skills (7%). Meanwhile, increasing international exports was considered the greatest opportunity by 13% of respondents. Other opportunities considered by 5% of respondents included making more of Jamaica's national brand globally and developing local markets and local supply chains.

Jamaica's cultural and creative industries face significant barriers to sales and business development. Addressing these barriers can improve Jamaica's competitive advantage in market development. Stakeholders from Jamaica's cultural and creative industries sought a combination of traditional and innovative means of bringing goods and services to market. Consultations pointed to discoverability, digital skills, and data as crucial development areas for the sector. The biggest priority was considered digital marketing and distribution, identified by nearly half of survey respondents (43%). Traditional means of market development were identified by just under half of survey respondents, including physical marketing and distribution (18%), showcases (13%), trade fairs (9%), and exhibitions (7%).

Access to financing was a major challenge impeding the growth and sustainability of Jamaica's cultural and creative industries. Many industry members had difficulty convincing funders and investors of the value of their work. Industry consultations reflected the views of survey respondents viewing the most significant barrier the sector faced in obtaining financing was convincing funders of the value of the sector.

Other issues facing the sector included the valuation of cultural and creative intellectual property (IP), which requires a nuanced understanding of the sector and cannot be approached in the same way as traditional bricks-and-mortar assets. The under exploitation of IP ownership was identified as the main barrier to financing by half of the survey respondents. Meeting stringent or unsuitable loan requirements from lenders was considered the second most significant barrier to financing, identified by nearly one fifth of survey respondents (18%). A lack of financial skills was deemed the third most significant barrier to financing, identified by 16% of respondents, followed by business pitching to investors (10%).

¹⁶ Nordicity, 'The Missing Pillar – Culture's Contribution to the UN Sustainable Development Goals', The British Council, 2020. https://www.britishcouncil.org/sites/default/files/the_missing_pillar.pdf

¹⁷ Planning Institute of Jamaica, 'Economic & Social Survey Jamaica', 2018.

Recommendations for Sector Development and Sustainability

This mapping of the cultural and creative industries leads to certain conclusions and recommendations for further CCI development in Jamaica. Though not mandated to make policy or structural recommendations, this research has led to conclusions and corresponding recommendations to further support the growth of the CCIs in Jamaica. This report provides a framework for direction, commitment, and action towards a long-term growth strategy.

The long-term ambition is to nurture a growing and sustainable cultural and creative industry in Jamaica that fosters inclusive growth and social benefit for all Jamaicans. There is an opportunity to place the CCIs front and centre of Jamaica's future as a core expression of the nation's culture. The CCIs are to be recognised for the important economic role in the modern, international economy, and a desirable driver of employment and social benefit.

Recommendations for sector development and sustainability:

- **Advance CCI policy and sector coordination:** Building a strong institutional infrastructure through policy and sector coordination requires good data, sound policy positions, and the ability to speak with one voice to government representatives. Important for this is the establishment of a national convening or umbrella body representing and supporting the CCIs in Jamaica. Additionally, governance measures, such as a Creative Economy Act, that streamline policies, strategies and mechanisms across Jamaica's 8 government departments and other support bodies in the CCIs will play a vital role. Other recommendations include developing a skills strategy and cultural infrastructure plan for Jamaica's CCIs and advancing Jamaica's CCI value chain linkages to include networks and relationships domestically and internationally.
- **Research, measure and advocate on behalf of the CCIs:** A key recommendation is to develop a more robust system to account for, and measure the performance of, the cultural and creative industries. There is a need to standardise and create processes that provide regular time series measurements of the progress of the CCIs together and individually, and to develop a data strategy with key performance indicators (KPIs). Stronger performance measurement should be complemented with actions that raise the profile, understanding, and value of the CCIs in Jamaica. These actions might include developing a CCI pan-sector federation or umbrella body and channeling a cohesive national approach to economic development.
- **Support CCI sectors through interventions:** Interventions to support CCI sectors in Jamaica should be holistic in addressing challenges and leveraging opportunities. A funding and financing plan could be developed to advance the availability of financial support to CCI stakeholders and optimise decision-making processes. Capacity building for artists, sector support structures, representative bodies, industry groups and associations is needed. Strategic partnerships and engagement with international partners will be critical to the success of CCI interventions. A human-centred, co-design approach will incorporate critical input from beneficiaries and ensure interventions are appropriate and effective.

1. Introduction and Context

The British Council in Jamaica in partnership with the Jamaica Business Development Corporation (JBDC) engaged Nordicity to carry out a sector mapping and situational analysis of the cultural and creative industries (CCIs) in Jamaica.

Numerous research initiatives over the years have been pushed forward by both government and academia to better understand Jamaica's cultural and creative sectors, many of which are now dated. This report aims to provide an updated review of Jamaica's CCI landscape, presenting existing industry data and a high-level analysis of the key factors impacting the industry's success. This scoping study provides the foundation for subsequent research phases of impact analysis and strategy development.

The cultural and creative industries in Jamaica have been growing in importance in terms of inclusive growth and international cultural relations over the last decade. Whilst the social and economic benefit of the sector is increasingly celebrated, there is a lack of up-to-date data and information available.

There is a growing confidence in Jamaica's creative industries by Jamaicans and government alike. The Planning Institute of Jamaica's 'Vision 2030 Jamaica National Development Plan' and its associated 'Medium-Term Socio-Economic Policy Framework 2018-2021' (MTF) makes commitments to strengthen the CCI's operational structures under "National Outcome #12 - Internationally Competitive Industry Structures". Strategies and related actions are committed to in this document that intend to develop Jamaica's CCI's into a well-functioning, internationally competitive industry. Precedence is given to actions that strengthen legislative and sector governance frameworks, enforcing the need to formalise the organization of the sector and develop products that are aligned with international standards.¹⁸ The framework includes specific goals and correlated actions to be carried out by the Ministry of Culture, Gender, Entertainment, and Sport (MCGES).

The Jamaica Ministry of Culture, Gender, Entertainment, and Sport (MCGES) announced the relaunch of a new National Cultural and Creative Industries Council (NCCIC) in 2019, now called Jamaica Creative. The Ministry of Industry, Commerce, Agriculture & Fisheries announced the National Craft Policy in July 2020. Among the responsibilities of the NCCIC will be to establish a digital platform for the distribution and promotion of Jamaican music, video, and fashion products,¹⁹ help establish the Kingston Creative Media Village ²⁰, establish a Creative Skills Council ²¹, and implement a Culture and Creative Industries Fund for Jamaica. The NCCIC is supporting the MCGES in revising Jamaica's forthcoming National Policy on Culture and Creative Economy 2020-2030.²² As such, many of the actions committed to in the Medium Term Socio-Economic Policy Framework 2018-2021 are in motion.

¹⁸ Planning Institute of Jamaica, 'Medium Term Socio-Economic Policy Framework', Vision 2030 Jamaica – National Development Plan, Planning Institute of Jamaica, 2018. <http://www.vision2030.gov.jm/Portals/0/MTF/MTF%202018%20-%202021%20-%2020March%202019.pdf>

¹⁹ MTF Action 10

²⁰ MTF Action 11

²¹ MTF Action 4

²² UNESCO, 'The National Policy on Culture and Creative Economy 2020-2030', Policy Monitoring Platform, 2020, <https://en.unesco.org/creativity/policy-monitoring-platform/national-policy-culture-creative>

Milestones in Jamaica's Cultural & Creative Industries

- 1941 – Little Theatre Movement Established
- 1960s – Emergence of reggae music (and popularity of the Rastafari movement from the 1930s)
- 1962 – Establishment of the National Dance Theatre Company (first in the English Speaking Caribbean)
- 1962 – Jamaica gains independence
- 1976 – Cultural Training Centre established (CTC)
- 1980 – CTC became Edna Manley College of the Visual and Performing Arts
- 1972 – 'The Harder They Come' film by Perry Henzell and starring Jimmy Cliff released
- 1995 – The situational analysis of the entertainment (recorded music) industry prepared for the Planning Institute of Jamaica
- 1998 – JAMPRO publishes the Strategic Plan for Jamaican Music in the 21st Century developed by Andrea Davis
- 2002 – Witter publishes study on An Economic Survey of the Music in Jamaica
- 2003 – National Cultural Policy of Jamaica published by the Culture Division of the Ministry of Education, Youth and Culture
- 2003 – Towards Jamaica the Cultural Superstate: The National Cultural Policy of Jamaica
- 2003 – The Entertainment Policy of Jamaica (Ministry of Industry and Tourism)
- 2004 – Hilary Brown publishes the 'National Strategy & Action Plan to Further Develop the Jamaican Music Industry'
- 2007 – International film co-production treaty signed with the UK
- 2007 – Jamaica hosts the 2007 Cricket World Cup
- 2007 – Mona School of Business, UWI publishes study on 'The Economic Contribution of Copyright-Based Industries in Jamaica'
- 2007 – WIPO commissions study on 'The Contribution of the Copyright-Based Industries to the Economy of Jamaica'
- 2008 – The Jamaica International Reggae Film Festival launched
- 2009 – UNCTAD 2009 Report on Creative Industries asserted that Creativity is synonymous with Jamaica
- 2009 – Vision 2030 Jamaica: National Development Plan – Culture, Creative Industries and Values published
- 2010 – The UN's Creative Economy Report 2010 recommends that the 'Government of Jamaica (GOJ) needs to focus on reggae, [dancehall], film and other creative services to grow [its] ailing economy.'
- 2013 – The 'creative industries' included in the Micro, Small & Medium Enterprise (MSME) and Entrepreneurship Policy by Ministry of Industry, Investment and Commerce
- 2013 – Office of Prime Minister approved National Cultural and Creative Industries Council – Ministerial Committees established
- 2014 – Entertainment and Creative Industries Registry (E Registry)
- 2014 – National Cultural & Creative Industries Commission Established
- 2015 – Kingston designated a UNESCO Creative City of Music
- 2018 – Jamaica's Reggae Music listed as UNESCO Global Treasure
- 2018 – National Culture & Creative Industries Unit established in Ministry
- 2020 – JBDC and British Council undertake Cultural and Creative Industries Mapping Project
- 2020 – National Craft Policy
- 2020 – National Cultural and Creative Industries Council (NCCI) established, becomes Jamaica Creative (2020)

1.1 Cultural & Creative Industries Mapping

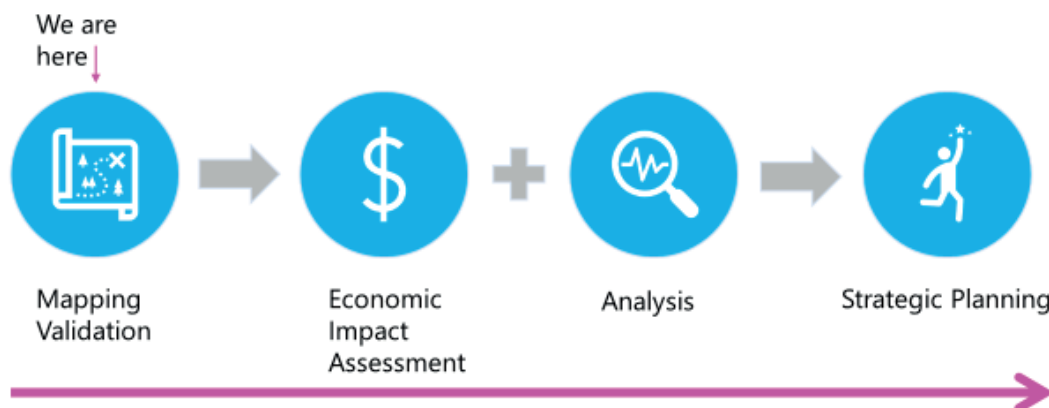
Cultural mapping is defined as “analytical methods for collecting and presenting information on the range and scope of the creative industries” to provide a foundation for assessing the economic potential of these sectors, particularly in jurisdictions where the cultural and creative sectors are not yet comprehensively understood.²³ The cultural mapping of Jamaica’s CCI’s are intended to:

1. Raise the profile of the cultural and creative industries,
2. Learn more about each cultural and creative sector,
3. Plan for future growth,
4. Engage leaders in the policy issues impacting cultural and creative sectors, and
5. Support wider political, social, and economic aims.

This report presents a validation of the existence and socioeconomic importance of Jamaica’s cultural and creative industries, and as such it marks an important step towards fully understanding the CCIs in Jamaica. It positions the Jamaica Business Development Corporation (JBDC) and British Council for the next phase of this work, which will include deeper analytical assessment and a formal, national economic impact analysis.

This report assesses the nation’s cultural and creative industries, identifies strengths and challenges, and provides strategic recommendations for the sector to review the economic and social potential to grow and sustain itself in the future. With a long arc of developing Jamaica’s cultural and creative industries, this report provides the mapping validation which sets the stage for the economic impact assessment in the short-term and strategic planning in the medium and long term.

Figure 1: The arc of developing Jamaica’s cultural and creative industries

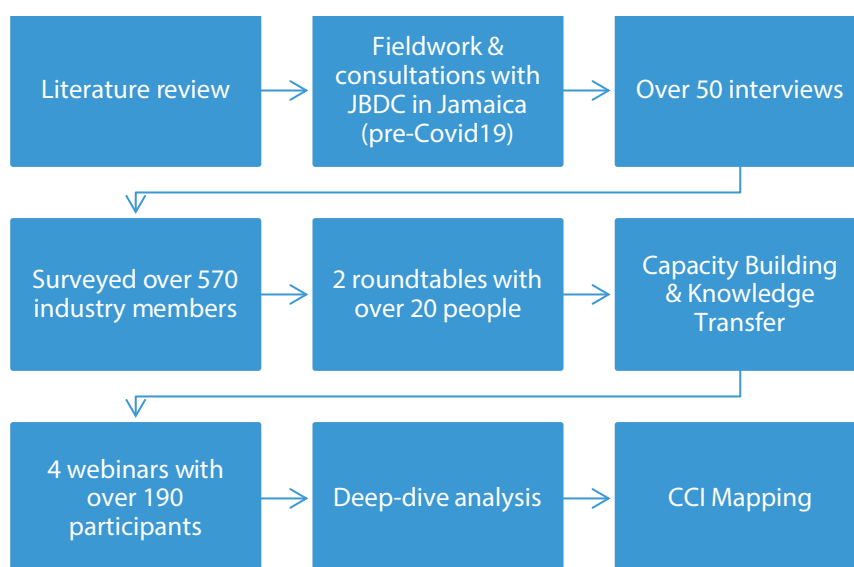


Source: Nordicity

²³ BOP Consulting, 'Mapping the Creative Industries: A Toolkit', British Council's Creative And Cultural Economy Series, The British Council, 2010.

2. Approach and Methodology

The methodology of this research followed established approaches to cultural and creative industries (CCI) mapping tailored to the Jamaican context. The study team also placed a premium on local knowledge transfer, delivering capacity building sessions to key Jamaican stakeholders including government entities, industry associations, institutions, businesses and researchers.



Literature Review

A literature review included secondary research and data collection. Sector-specific data was collected through a review of publicly available research and policy documents as well as data provided by industry stakeholders.

Fieldwork

Nordicity undertook fieldwork in Jamaica including roundtable meetings, focused group discussions, key informant interviews and consultation and capacity development with stakeholders from government, institutions, and the private-sector. Fieldwork took place in January 2020. Two roundtables were held with over 20 representatives from across government ministries and departmental agencies, associations and institutions.

Further fieldwork scheduled for April 2020 was substituted with online consultations, webinars, and capacity building as a result of the COVID-19 pandemic.²⁴

²⁴ Statista's Jamaica Country Report 2020 notes that Jamaicans prefer an indirect communication method in business settings with small talks an integral part of the country's culture.

Key Informant Interviews

Over 50 key informant interviews were held with individuals from across Jamaica's cultural and creative industries to provide insight into the functioning of the sector.

Survey

A survey was administered by Nordicity from February to October 2020 and promoted by JBDC and partners. The survey generated 581 responses from stakeholders across Jamaica's cultural and creative industries. The survey remained active for an extended period to provide further access for stakeholder engagement as a result of the impact of COVID-19.

Capacity Building and Knowledge Transfer

Capacity building was a core deliverable featured throughout the project. Nordicity embedded knowledge transfer in their research, in collaboration with JBDC, with Jamaican government, associations, institutions, researchers, and enterprises. A participatory approach to the research enabled unique capacity building and knowledge transfer through co-design with stakeholders on the approach and methodology, data collection and analysis.

Nordicity delivered a series of four webinars to over 150 stakeholders in Jamaica's CCI sectors working closely with Jamaica Business Development Corporation (JBDC). Webinars featured capacity-building content developed by the consulting team. They included subject matter specialist presentations from Jamaican and international experts in economics, industry associations, creative entrepreneurship and digital strategies. The webinars provided capacity building in (i.) Economic Impact Analysis, (ii.) Cultural and Creative Industry Mapping, (iii.) Industry Associations and Institutional Development, and (iv.) Digital Strategy and Market Development.

Deep-Dive Analysis

The research was analysed through a framework devised for the cultural and creative industries comprising infrastructure, skills, finance, markets, data and information, and creation and production. A SWOT analysis was applied to conclusions and recommendations.

3. The Cultural and Creative Industries

Jamaica has a rich and enviable tradition of the cultural and creative industries (CCIs) that has evolved in a historical context largely based on the narrative, celebration, protest and affirmation of its people, culture, and way of life. It is known resoundingly across the globe for its music, dance and folklore, and for giving birth to some of the most recognisable genres across the globe including reggae and dub. The ‘brand Jamaica’ was born out of Jamaica’s strong tradition of culture and yields tremendous potential for the nation as a whole, which also serves as one of the country’s greatest foreign exchange earning potentials.²⁵

Jamaica’s Cultural and Creative Industries in Numbers

There is a need for verification of the contribution of CCIs to Jamaica’s economy. According to UNESCO, Jamaica’s cultural and creative industries’ (CCIs) are estimated to contribute 5.2% of the country’s GDP, generating revenues of JMD \$2.2 billion annually, and accounting for 3% of total employment.

The feedback from consultations during this mapping exercise suggested that these figures were low, particularly in light of the informal nature of many aspects of these industries. This informality is pervasive, however the economic impact is visible, whether through major festivals such as Rebel Salute and Reggae Sumfest to smaller events such as “round robins”. Activities such as “Round Robins” contribute significantly to the livelihood of persons in many low-income communities across Jamaica. These are events that are held as an organised activity over a set period of time, in which hosts pool funds and rotate the venue for the event, over consecutive days/weekends to a location determined by each participating host. The hosts and their network attend all the events supporting and ensuring success and a good financial return for each participating host.

There is an urgent need to research and document the economic impact of CCIs in Jamaica with a population of just under 3 million people, Jamaica’s GDP of JMD \$2.4 trillion had a growth rate of 1.7% and a trade deficit of JMD 718 billion in 2019.²⁶ Jamaica’s greatest merchandise exports are food items, with a vast majority of trade going to the US. The Planning Institute of Jamaica estimated the ‘Other Services Industry’ – of which the Recreational, Cultural and Sporting Activities (RCS) sub-industry accounts for the largest share – recorded an increase of 0.9 per cent in Real Value Added’ in 2018.²⁷

The Jamaica’s Cultural and Creative Industries in the Global Context

Globally, the world’s cultural and creative industries generate US\$2.3 trillion in annual revenues and employ 1% of the worldwide population.²⁸ Latin America and the Caribbean account for US\$124 billion of these revenues, employing an estimated 1.9 million people in total.²⁹ In both developed and developing economies alike, the CCIs have accelerated regional growth by leveraging the talent, creativity and innovation of their people, generating high quality jobs, and increasing productivity and exports. They have also provided a resounding opportunity for social impact and inclusive growth.

The CCIs in Jamaica have a prominent role in the economy and present a highly promising future. Presenting a significant untapped potential, as demonstrated in other countries, the CCIs are experiencing a high and sustained growth rate that has surpassed other more traditional sectors globally. The size of the global market for creative goods more than doubled in size from 2002 to 2015, with an average growth rate exceeding 7%.³⁰ Between 2003 and 2012, exports alone of creative goods grew by 68% across

²⁵ Fleming, ‘Prioritisation Paper: Development of a Business Plan for the Caribbean Creative Industries Management Unit’, Caribbean Development Bank, 2016.

²⁶ UNCTAD, Jamaica Country Profile, 2019. <https://unctadstat.unctad.org/CountryProfile/GeneralProfile/en-GB/388/index.html>

²⁷ Planning Institute of Jamaica, ‘Economic & Social Survey Jamaica’, 2018

²⁸ EY, ‘Cultural Times: The First Global Map of the Cultural and Creative Industries’, UNESCO, 2015. https://en.unesco.org/creativity/sites/creativity/files/cultural_times_the_first_global_map_of_cultural_and_creative_industries.pdf.

²⁹ Ibid.

³⁰ United Nations, ‘Creative Outlook: Trends in international trade in creative industries 2002-2015’, UNCTAD, 2018.

developing economies.³¹ In the UK, the CCI sectors grew more than five times faster than the national economy, generating over 3 million jobs (accounting for one in 11 UK jobs) and contributing over GBP £111 billion in GVA (equivalent to £306 million per day).³² Meanwhile, the UK's CCI services sector generated over £35 billion in exports, with a growth rate of 8.9%, accounting for 12% of the UK's national services exports.³³

The global visual arts, music, and books CCI sectors employed the most people in 2013, while the television, visual arts, and newspaper/magazines sectors recorded the highest revenues.³⁴ In the Latin America and Caribbean region much of these rankings remain true, with the visual arts, architecture, and book sectors accounting for the highest levels of employment among all other CCI sectors and the television, advertising, and newspaper/magazine sectors leading all other CCI sectors in revenue generation in 2015.³⁵

Jamaica has a strength in global creativity ranking 72nd among 131 economies on the WIPO Global Innovation Index (GII), outperforming Peru, Argentina, Dominican Republic and Trinidad and Tobago but below Colombia and Brazil.³⁶ The Jamaican Creative Output sub-index scored 30.0, ranking 42nd globally, outperforming Mexico, Costa Rica and Panama.³⁷

Jamaica ranked 80th out of 141 economies on the World Economic Forum's Global Competitiveness Index, which ranks the policies, support mechanisms, institutions, and other factors that encourage productivity and sustainable economic development in the short to medium horizons of the world's economies.³⁸ On this index, Jamaica outperformed Argentina, Honduras, Haiti and Guatemala while following very close behind the Dominican Republic and Trinidad and Tobago.³⁹

31 UNCTAD, Global Database on Creative Economy, Beyond 20/20 WDS - Table view - Exports and imports of creative services, annual, 2003-2012 (Discontinued) (unctad.org).

32 DCMS, 'DCMS Sectors Economic Estimates 2018: GVA', 2020.

33 Ibid.

34 EY, 'Cultural Times: The First Global Map of the Cultural and Creative Industries', UNESCO, 2015. https://en.unesco.org/creativity/sites/creativity/files/cultural_times_the_first_global_map_of_cultural_and_creative_industries.pdf.

35 Ibid.

36 Cornell INSEAD WIPO, 'Global Innovation Index 2020: Jamaica', 2020, <https://www.globalinnovationindex.org/analysis-economy>.

37 Ibid.

38 Schwab, 'The Global Competitiveness Report 2019', World Economic Forum, 2019. http://www3.weforum.org/docs/WEF_TheGlobalCompetitivenessReport2019.pdf.

39 Ibid.

Scoping and Defining the Cultural & Creative Industries in Jamaica

Scoping and defining the cultural and creative industries in Jamaica has incorporated international standards from UNESCO, CARICOM, the UK Department for Digital, Culture, Media, and Sport (DCMS). Each of these institutions approach the definitions and taxonomies of the cultural and creative industries in nuanced ways. The Jamaican Ministry of Culture, Gender, Entertainment and Sport (MCGES) has operated with a broad and inclusive approach, characterized as the Entertainment, Culture and Creative Industries (ECCIs). The ECCIs comprise the sport and gastronomy/culinary arts alongside music, visual and performing arts, film and TV, publishing, digital media, events, fashion and intellectual property rights.

Based on a review of international standards from MCGES, CARICOM, UNESCO, and the UK's DCMS, and insight gleaned from research and consultation with Jamaican CCI stakeholders, a Jamaican model was developed for this study. Recognising the distinction between each sector is distinct, it is important to note that many practitioners often work across multiple sectors and may not identify themselves as working within such a framework. The sector composition of Jamaica's CCIs for the scope of this study is depicted in the graphic below.

Figure 2: Cultural and Creative Industries definition Framework for Jamaica

Jamaica Ministry of Culture, Gender, Entertainment & Sport	CARICOM	UK Department for Digital, Culture, Media & Sport	Jamaica's Cultural and Creative Industries
1. Music, Entertainment Industry, Publishing & Literary 2. Architecture & Design 3. Art, Craft, Antiques & Fine Arts 4. Audio-Visual, Film, Video, Media Arts, Animation, Broadcasting, Advertising 5. Performing Arts, Theatre 6. Fashion, Fashion Industry 7. Culinary/Gastronomy 8. Sports 9. Tools of Trade	1. Arts & Culture: Performing Arts, Visual Arts, Literary Arts, Photography, Craft, Culinary Arts, Libraries, Museums, Galleries, Archives, Heritage Sites, Festivals, Arts Supporting Enterprises 2. Design- Advertising, Architecture, Web & Software Design, Graphics, Industrial Design, Fashion, Communications, Interior & Environmental Design 3. Media: Broadcasting (includes P1, Radio & Cable), Digital Media (includes Software & Computer Services), Film & Video, Recorded Music, Publishing, Video Games 4. Cultural Heritage: Immovable Sites, Intangibles, Natural Sites, Underwater Sites	1. Advertising & Marketing 2. Architecture 3. Crafts 4. Design: Product, Graphic & Fashion 5. Film, TV, Video, Radio & Photography 6. IT, Software & Computer Services 7. Publishing 8. Museums, Galleries & libraries 9. Music, Performing Visual Arts	1. Music 2. Literature & Publishing 3. Visual Arts 4. Design, Gifts & Crafts 5. Film 6. Television & Broadcast 7. Digital Media 8. Advertising & Marketing 9. Theatre, Dance & Performing Arts 10. Fashion 11. Culinary/Gastronomy 12. Museums, Galleries & Libraries 13. Cultural Heritage
UNESCO			
1. Cultural & Natural Heritage 2. Performance and Celebration 3. Visual Arts & Crafts 4. Books & Press 5. Audio-Visual & Interactive Media 6. Design & Creative			

Source: Nordicity analysis, UNESCO, Jamaica Ministry of Culture, CARICOM, British Council, DCMS

Stakeholders in Jamaica's Cultural and Creative Industries (CCIs)

Jamaica's cultural and creative industries comprise an ecosystem of stakeholders, including artists, employees, freelancers, entrepreneurs, companies & enterprises, associations & industry representation bodies, educational institutions, and government.

Government support and oversight of Jamaica's CCI sectors administered across a myriad of ministries and departmental agencies. The fragmentation of cultural policy and strategy is overseen by as many as 9 bodies, including not only the departments of culture but also those of tourism, commerce, education, the office of the prime minister, amongst others, each with oversight of different elements of the sector's value chain.

Each ministry and departmental agency oversees separate agencies on an as needed basis to manage certain regulatory or developmental activities. For example, the Jamaica Business Development Corporation (JBDC) was established in 2001 as an agency of the Ministry of Industry, Commerce, Agriculture and Fisheries (MICAFA), to provide micro, small, and medium-sized enterprises (MSMEs) with business training and development services and manage the authentic retailer, Things Jamaican.

The sector is represented by a growing number of industry associations, guilds, and societies who represent the interests of their specific CCI sectors. These associations carry various responsibilities from advocacy to training, to the negotiation to obtain and dispersal of commissions from the licensing and use of Jamaican creator's works in different markets.

There also exists a small number of institutions and agencies which operate in a hybrid model that both support the social aspects of Jamaica's CCIs while also encouraging entrepreneurship and professional growth, such as Kingston Creative.

At the core of the cultural and creative industries are the artists, creatives, creative businesses and not-for-profits that work within them. These comprise both individuals and organisations including businesses, entrepreneurs, freelancers, self-employed artists, and creatives who create Jamaica's CCI products and services. These stakeholders exist in various forms and sizes, with a high proportion of freelancers/independent artists noted across Jamaica's CCIs.

Enterprises & Individuals

- Individual Artists & Creatives
- Individual Freelancers & Entrepreneurs
- Individual Employees & Workers
- Businesses & Enterprises
- Charities
- Not-for-profits

Policy, Government, Ministries & Departmental Agencies

- Companies Office of Jamaica
- Development Bank of Jamaica (DBJ)
- Entertainment Advisory Board (EAB)
- Jamaica Broadcasting Commission
- Jamaica Business Development Corporation (JBDC)
- Jamaica Creative / National Cultural and Creative Industries Council (NCCI)
- Jamaica Cultural Development Commission
- Jamaica Film Commission
- Jamaica Intellectual Property Office (JIPO)
- Jamaica Promotions Corporation (JAMPRO)
- Ministry of Culture, Gender, Entertainment and Sport
- Ministry of Education, Youth and Information
- Ministry of Industry and Commerce
- Ministry of Tourism
- National Export-Import Bank of Jamaica (EXIM Bank)
- Statistical Institute of Jamaica (STATIN)
- The Planning Institute of Jamaica (PIOJ)
- Ministry of Education, Corporate Jamaica, and Cultural Community Groups
- National Library of Jamaica (NLJ)

⁴⁰ This list is non-exhaustive and will continue to be updated and further developed. We strongly welcome and encourage input to update these lists.

Associations and Representative Bodies

- Advertising Agencies Association of Jamaica (AAAJ)
- Association Caribbean Copyright Societies (COTT)
- Association of Copyright Caribbean Societies (ACCS)
- Association of Copyright Caribbean Societies (ACCS)
- Book Industry Association of Jamaica (BIAJ)
- Jamaican Copyright Licensing Agency (JAMCOPY)
- Designers Guild
- eSports Jamaica
- Jamaica Animation Nation Network (JANN)
- Jamaica Anti-Piracy Alliance (JAPA)
- Jamaica Association of Composers, Authors & Publishers Limited (JaCAP)
- Jamaica Association of Villas & Apartments (JAVA)
- Jamaica Association of Vintage Artistes & Affiliates (JAVAA)
- Jamaica Design Association (JDA)
- Jamaica Federation of Music (JFM)
- Jamaica Federation of Music and Affiliates Union (JFMAU)
- Jamaica Performers Administration Society (JPAS)
- Jamaica Film & Television Association (JAFTA)
- Jamaica Football Federation Ltd. (JFF)
- Jamaica Guild of Artists
- Jamaica Hotel and Tourism Association (JHTA)
- Jamaica Music Society (JAMMS)
- Jamaica Sound System Federation
- Jamaican Association of Dance and Drama Educators (JADDE)
- Jamaican Institute of Architects (JIA)
- Jamaican Writers Society (JaWS)
- Premier League Clubs Association (PLCA)
- The Jamaica Reggae Industry Association (JaRIA)
- Visual & Performing Arts Jamaica (VPAJ)
- Jamaica Wood Products And Furniture Association

Educational Institutions

- Creative Production and Training Centre
- Edna Manley College of the Visual and Performing Arts
- iCreate Institute – University of the Commonwealth
- Northern Caribbean University
- University of Technology
- University of West Indies (Caribbean School of Media and Communication)
- Vocational Training Development Institute
- HEART/NSTA Trust
- Excelsior Community College

International Partners

- British Council
- Carib Export
- Caribbean Development Bank (CDB)
- CARICOM
- CARIFORUM
- Inter-American Development Bank (IDC)
- UNCTAD
- UNESCO
- UNDP
- USAID
- World Banks
- World Intellectual Property Office (WIPO)
- Commonwealth Secretariat

Spotlight: Jamaica Business Development Corporation

– Supporting Jamaica’s Cultural and Creative Industries

The Jamaica Business Development Corporation (JBDC) is Jamaica’s premier business development organisation. Established in 2001 as an agency of the Ministry of Industry, Commerce, Agriculture and Fisheries, the JBDC is committed to pursuing programmes and policies that foster development, sustainability, modernization and growth in the Micro, Small and Medium-size Enterprise (MSME) sector. Over the years, the JBDC has offered solutions and capacity building to Jamaica’s MSMEs including training, project management, market development and access and more. They also offer technical and business incubation support through their Incubator and Resource Centre (IRC).

The Jamaica Business Development Corporation has been a long-time ally and supporter of Jamaica’s Cultural and Creative Industries. They have been a leading force in developing and promoting “Brand Jamaica” in both regional and international domains, in part through their leadership of the authentic Jamaican retailer, Things Jamaica.

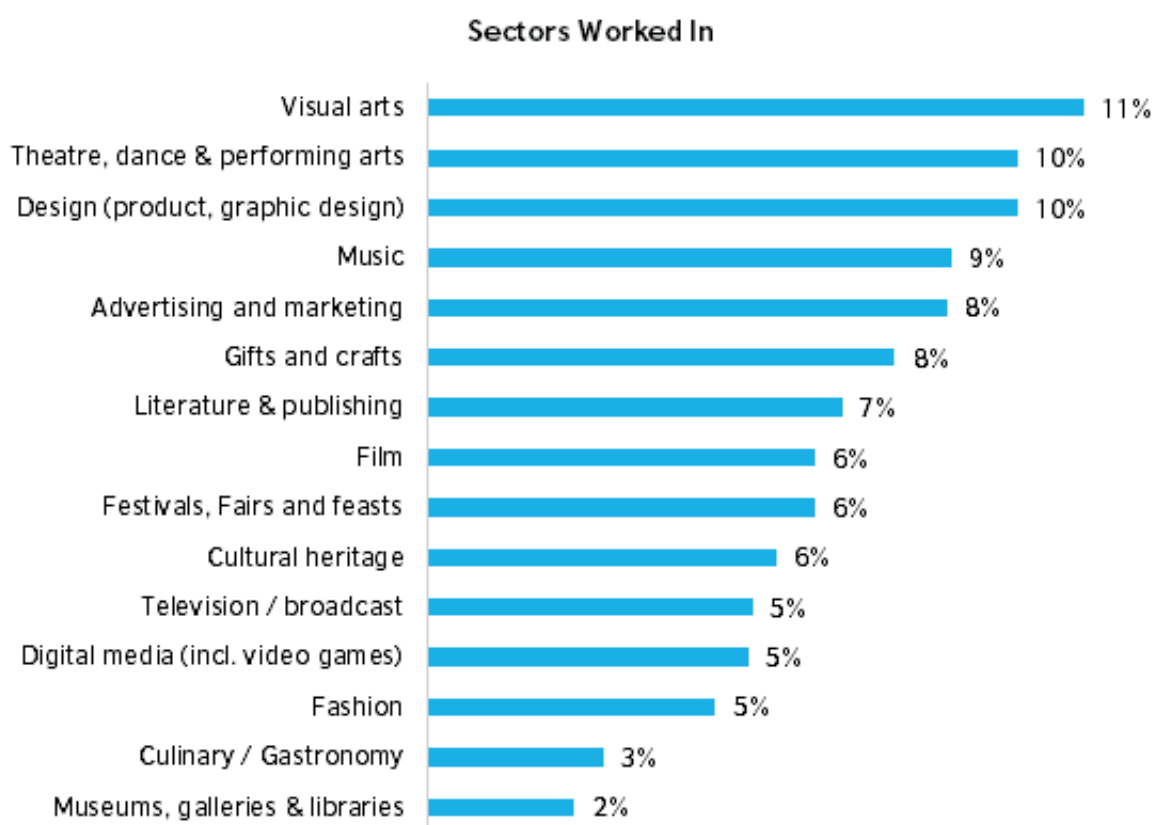
The JBDC has taken many actions in 2020 to further support the myriad of subsectors that make up Jamaica’s CCIs. In early March, the JBDC launched a website and eCommerce platform for Things Jamaica, widening the retail chain’s market to include direct-to-customer international sales. Through summer 2020, the JBDC hosted a batch of weekly webinar series’ to provide training to entrepreneurs, MSMEs, and CCI sector practitioners remotely. Their ‘JBDC In Concert’ series launched in March 2020 and featured weekly presentations and panel discussions on topics of interests to Jamaica’s various CCI subsectors. Business training workshops were provided weekly through the ‘JBDC Virtual Biz Zone’ series. Topics included how to manage businesses through a crisis, how to build careers in the arts, and business commerce solutions among many more. A separate Virtual Biz Zone series was created for practitioners in the Gifts & Crafts sector, presenting training on topics specific to businesses in this domain.

Marking a continuous commitment to defining, understanding, and strengthening Jamaica’s Cultural and Creative Industries, in January of 2020 the Jamaica Business Development Corporation in partnership with the British Council, commissioned Nordicity to put together the first ever mapping of these sectors, marking a first step towards economically defining the value of this industry. Further projects, including an economic impact analysis of the CCIs, are planned for the coming years.

3.1 Profile of Jamaica's Cultural and Creative Industry Members

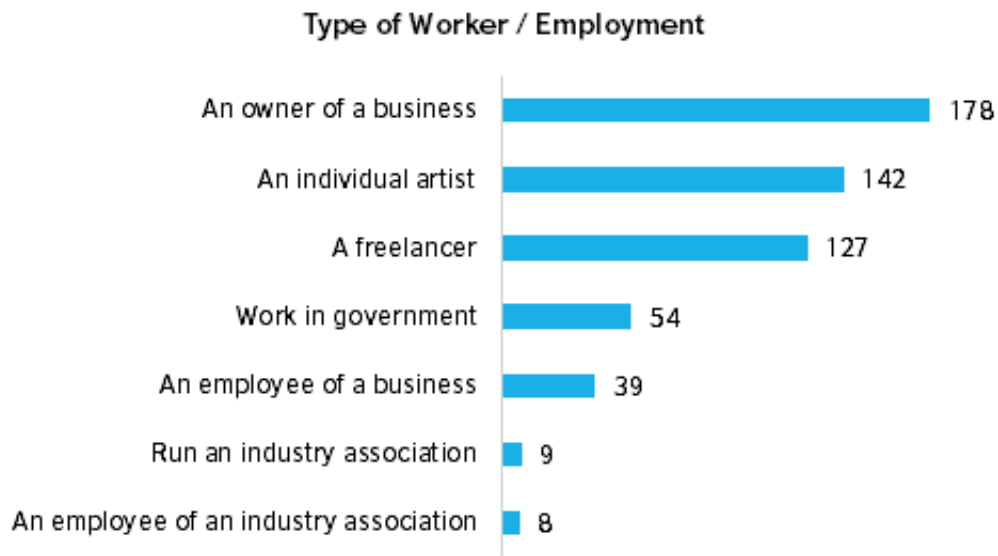
Jamaica's CCI members are comprised of a vast and varied population of creatives, freelancers, SMEs, micro-enterprises, workers and support bodies. Nordicity's survey of over 550 CCI stakeholders reflects a workforce of creative business owners, artists, freelancers and workers from across the country, providing some insight into the composition of the CCIs.

Respondents to the Nordicity survey had higher responses from the visual arts, performing arts, design, and music sectors, and fewer from the culinary/gastronomy and museums, galleries and libraries sectors. The distribution of responses across Jamaica's CCI sectors are presented in the chart below.



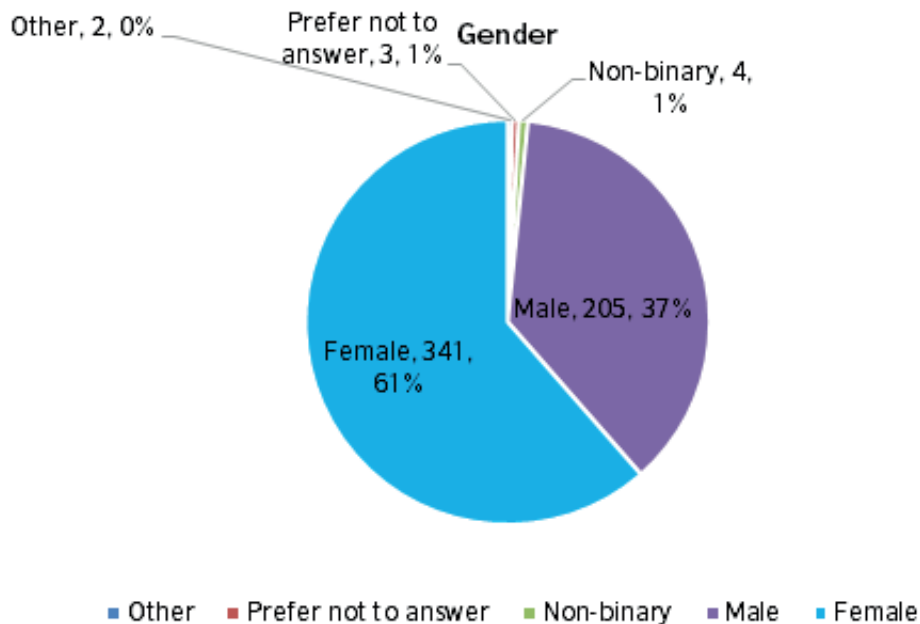
Source: Nordicity Survey 2020. Sample: n=556. Note: Multiple choices available.

Nordicity's survey comprised responses from 178 business owners and entrepreneurs (32% of respondents), 142 individual artists (25%), 127 freelancers (23%), 54 government workers (10%), 39 employees (7%), 9 industry association leaders (2%) and 8 industry association workers (1%).



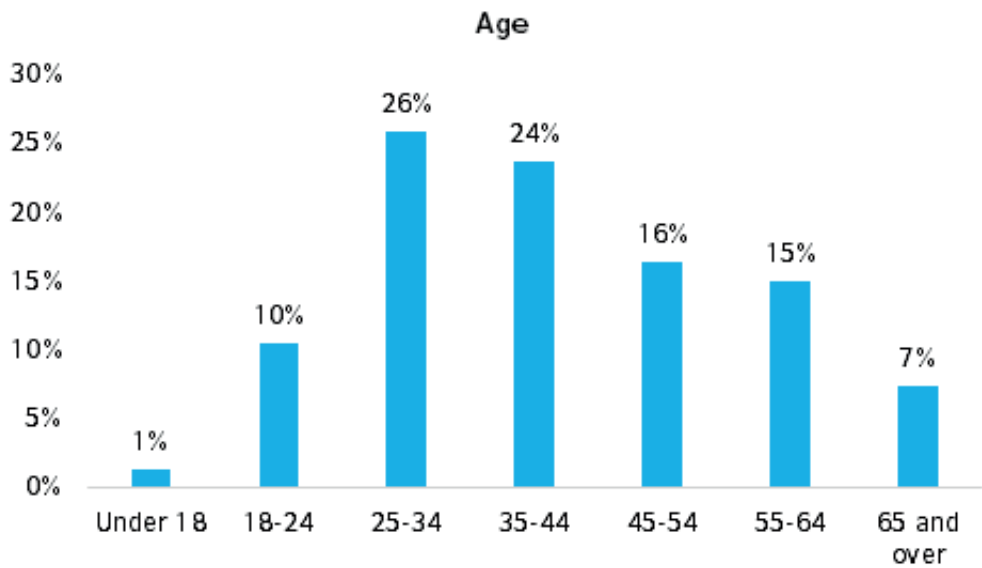
Source: Nordicity Survey 2020. Sample: n=557

A majority of cultural and creative industry respondents to the Nordicity survey identified as female (61%). Over one-third of respondents identified as male (37%), whilst a minority identified as non-binary, preferred not to answer, or other (2%).



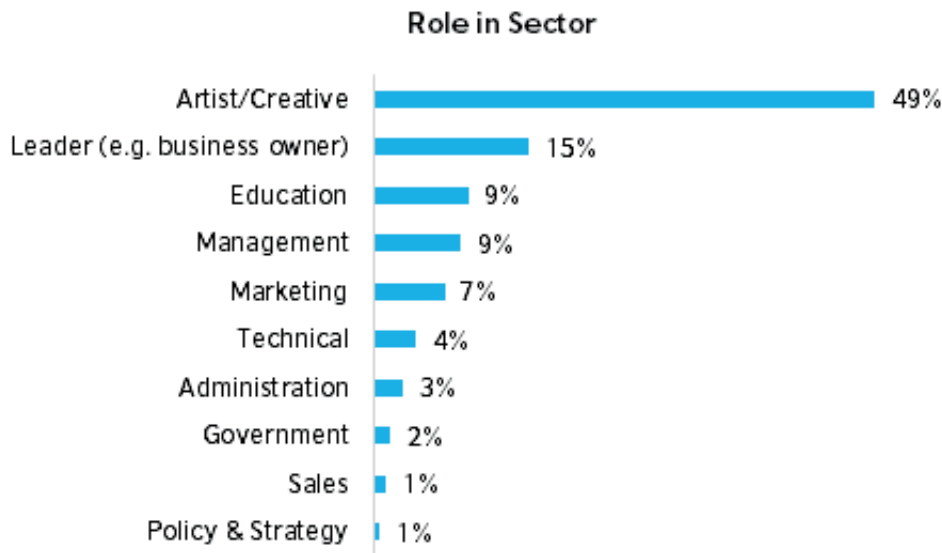
Source: Nordicity Survey 2020. Sample: n=555

Jamaica’s cultural and creative industries are relatively mixed in age. Half of the respondents to the Nordicity survey were between the ages of 25-44 years old (50%), whilst 38% were above the age of 45, and 11% were under the age of 24.



Source: Nordicity Survey 2020. Sample: n=556

Jamaica’s cultural and creative industries are comprised of a large proportion of individual artists and creatives. Approximately half of the respondents to the Nordicity survey were individual artists or creatives (49%). Industry leaders such as creative business owners represented 15% of respondents, followed by education (15%), management (9%), marketing (7%), technical (4%), administration (3%), government (2%), and sales, and policy and strategy (1% each).



Source: Nordicity Survey 2020. Sample: n=556.



4. Cultural and Creative Industry Subsectors

Jamaica's cultural and creative industries comprise subsectors including music, film, television and broadcast, book publishing, digital media, culinary and gastronomy, gifts and crafts, visual arts, fashion and performing arts, each with its own unique context, heritage and potential. Whilst there is a considerable amount of prior research and data available from across Jamaica's CCI's, to date the sector is challenged by a lack of consistency and considerable gaps in data available. Further research planned by the JBDC and partners will seek to address these very gaps.

4.1 Music Industry

Jamaica has the most developed music industry, and is the largest exporter of music, in the Caribbean.⁴¹ Jamaica's annual music exports are valued at around JMD \$12-15 billion, accounting for around 1.7% of Jamaica's goods and services exports.⁴² It is estimated that there were 6,000-12,000 persons working in Jamaica's music sector, including 2,500 musicians and 1,700 sound system technicians.⁴³ An estimated 24% of people in the sector were self-employed.⁴⁴ Many music industry members consulted also reported working in the performing arts to supplement their work and income.

In 2018, the Jamaica Association of Composers, Authors, and Publishers (JACAP) disbursed JMD \$134.2 million worth of royalties to its 3,700 members.⁴⁵ JMD \$13.8 million of this amount was collected from overseas royalties.⁴⁶ Music sector leaders estimate that, on average, Jamaican musical artists make around JMD \$6 million per international performance - depending on the status and popularity of the musician/act. The Jamaica Music Society (JAMMS) generated a total income of JMD \$84.1 million in 2018, reflecting an increase from 2017 due to higher collections from licensing fees. Total royalty payouts increased by JMD \$0.6 million to JMD \$35.6 million in 2018, reflecting a higher demand for the use of Jamaican music.⁴⁷

This sector has seen much support by way of industry associations, copyright collection societies, and some government support historically. While there has been a strong push in recent years to uphold the protection measures posited in the 1993 Copyright Act by JIPO, JAMMS, and JACAP, digital disruption has brought about enforcement challenges, reinforcing a culture of non-compliance by music users, both locally and internationally. The challenge of enforcing copyright compliance is compounded by regulatory lag and the legal system, as industry stakeholders have noted that it can take years to have copyright cases taken through the courts.

The increased use of digital technologies has also lowered barriers to entry into the music sector. Previously, prospective musicians would have to rent recording studios, sound mixing equipment, and engage music publishers to record and prepare their works, but now these things can all be done by the musician from their own homes. As these practices become more prevalent, the effects on the music industry value chain need to be considered.



⁴¹ Hendrickson et al., 'Creative industries in the Caribbean: a new road for diversification and export growth', United Nations, 2012, <https://core.ac.uk/download/pdf/45619448.pdf>

⁴² Fleming, 'Prioritisation Paper: Development of a Business Plan for the Caribbean Creative Industries Management Unit', Caribbean Development Bank, 2016.

⁴³ Ibid.

⁴⁴ Ibid.

⁴⁵ Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

⁴⁶ Ibid.

⁴⁷ Ibid.

Reggae Sumfest and its predecessor Reggae Sunsplash are internationally recognized festivals, which have launched the careers of many of Jamaica's most talented international artists. Reggae Sunsplash, which started in 1978, is widely acknowledged as the original reggae music festival. Along with its home impact attracting millions of visitors to the island; its touring feature has spawned numerous reggae festivals around the world. The 2018 Reggae Sumfest festival is said to have generated JMD \$201.8 million in local expenditures, creating about 100 temporary jobs.⁴⁸ Jamaica's musical history and its international significance was recognized by UNESCO in 2015, when Kingston was designated a UNESCO city of music.

Moving forward, there are opportunities for the sector's support organisations and government to negotiate trade agreements for Jamaica's music products among the island's most prominent international trade partners, to ensure Jamaican musical artists receive fair compensation for their work in international contexts. Stakeholders have also suggested that national music sector curricula might benefit from incorporating business courses, to encourage music practitioners to utilise standardization in reporting and contract drafting practices.

4.2 Film, Television and Broadcast Industry

Jamaica's heritage in film, TV, and broadcasting can be dated back to 1918. The Jamaican film sector accounts for 0.52% of national employment as well as 0.62% of national GDP,⁴⁹ the activities of which are largely composed of service production for on-location foreign films.⁵⁰ In 2017, Jamaica was the site and country of origin for more than 141 films and television series, including the Netflix hit *Top Boy*.⁵¹ In 2018, 106 films were registered to film in Jamaica, bringing with them investments totaling JMD \$761.5 million which created approximately 1,600 temporary jobs.⁵²

There are an estimated 20 active film and video production companies in Jamaica with 300 independent contractors providing video production services.⁵³ The Jamaica Film & Television Association (JAFTA) represents approx. 250 registered members while the Jamaica Animation Nation Network (JANN) represents approx. 100 active members. The Jamaica Film Commission registers around 150 film productions in Jamaica per year. Industry stakeholders note that it is common to find practitioners in the film sector working more regularly in television, broadcasting, and advertising due to the infrequency of film projects on the island. In 2018, 48 subscription television operators (STVO's) were active in Jamaica.⁵⁴

The Jamaican film sector is supported in part by the Jamaica Film Commission (JFC) and the Jamaica Film Commissioner through JAMPRO who continue to invest in and advocate on behalf of developing the local sector. Investments in the Creative Industries by JAMPRO increased by 27.8% to JMD \$408.3 million in 2018.⁵⁵ The JFC has also been working towards the development of a national screen fund. Such a fund has been advanced for some time and is expected to come to fruition soon.

JAMPRO has advocated on behalf of the Jamaican film sector internationally, having worked to establish a co-production treaty with the United Kingdom in 2007 and encourage the government to create incentives to strengthen the sector. Their advocacy efforts have resulted in the availability of Production Input Relief (PIR) for duty-free importation of production equipment, bond waiver facilitation for temporary equipment importation, talent discovery programs, advancing the Jamaican screen fund initiative and the establishment of an Employment Tax Credit (ETC) for Jamaican producers, among others.⁵⁶

After making recent gains in terms of public support, compared to many other countries of various sizes and economic weight, Jamaica's Film, TV, and Broadcast sector remains hindered by a lack of public incentives to stimulate the growth and activity of the sector. Stakeholders have noted a lack of grant/equity investment programs seen in other countries. Not only do larger countries such as the UK and Canada stimulate the development of film, TV, and broadcasting projects, but many smaller countries do as well, (E.g., Trinidad and Tobago and Slovenia to name a couple of examples). Industry stakeholders have

48 Ibid.

49 Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

50 Hendrickson and Niaah, 'A study on the creative industry as a pillar of sustained growth and diversification. The film and music sectors in Jamaica: lessons from case studies of successful firms and ventures', United Nations, 2018

51 Ibid.

52 Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

53 Fleming, 'Prioritisation Paper: Development of a Business Plan for the Caribbean Creative Industries Management Unit', Caribbean Development Bank, 2016.

54 Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

55 Planning Institute of Jamaica, 'Economic and Social Survey Jamaica', 2018

56 Welsh, 'Guide to Filming in Jamaica', JAMPRO, 2018.

noted that this lack of support mechanisms has constrained the completion of original film and TV content creation occurring in Jamaica. The result is decreased activity in these sectors when there are no international productions being shot on location on the island, which ultimately leads to skill deficits among sector practitioners.

Film and television sector stakeholders have expressed optimism over recent efforts to stimulate the sector through the Film Fund - which is a start. Meanwhile, it is recognized that there remain further opportunities to retain talent and develop the sector locally. Stakeholders interviewed for this engagement suggested that implementing more curated training programmes locally and working towards instituting financial investment incentives aimed at encouraging the development and production of Jamaican film/TV productions would benefit the sector's development.



4.3 Book Publishing Industry

The economic value of the book publishing industry in Jamaica has been recognized since the beginning of the millennium in academia and independent research projects in the Caribbean. Jamaica's book publishing industry is an exporter. In 2017, Barbados was the top destination for Jamaica's printed books. Exports to this Caribbean island amounted to JMD \$5.9 million that year. Past data has suggested there is an imbalance between the value of books imported into the Caribbean versus the value of those exported. In 2000, book imports in the CARICOM region amounted to between JMD \$15-\$38 billion while book exports landed around JMD \$3.8 billion.⁵⁷ In Jamaica, there was a trade imbalance on "printed matter" of JMD \$-55 billion from 2001-2004.⁵⁸

⁵⁷ Nurse, 'The Cultural Industries in CARICOM: Trade and Development Challenges', Caribbean Regional Negotiating Machinery, 2006.

⁵⁸ Ibid.

Industry stakeholders identified up to 5 English-speaking publishing houses in Jamaica. The sector was also characterized with an oversaturation of authors and self-publishers, which means that the existing book publishers could provide publishing opportunities only to the few. Reduced barriers to entry brought about as a result of the increased use of domestic digital technologies have resulted in a growing number of writers - but not a corresponding increase in publishing opportunities. Meanwhile, textbook publishing has become a significant activity in the sector.

Jamaica's book publishing sector is represented by the Book Industry Association of Jamaica (BIAJ) who have made many recent gains in legitimizing the local industry. Unlike many international publishing associations, the BIAJ represents a wide range of industry stakeholders including publishers, book sellers, promoters, and a select few authors. As such, the BIAJ acts as an industry association for the entire value chain of the book publishing industry in Jamaica. In 2018, the BIAJ became the only industry association to become members of the International Publishers Association which opened the doors for other Caribbean book industry associations to become members as well.

Stakeholders in the book publishing sector note that there has been a lack of financial and infrastructural support provided to it over the years which has hindered its growth, especially in the age of Amazon and lower margins for book publishers. Prominent international writers have emerged out of Jamaica, but the majority have had to relocate elsewhere to be able to get published and build a sustainable career. Outside of the textbook publishing subsector, livelihoods in book publishing cannot sustain economic outcomes that would allow creatives to focus exclusively on their craft. Thus, there are barriers to publishing in Jamaica as a springboard for building audiences internationally.

The sector operates relatively informally, with little coordination and disparate value chains. There is an opportunity for the larger authors, publishers, and institutions to work with government to devise a plan to strengthen and support the formalization and development of the sector, including the definition of its value chain, moving forward.

Digital technology has revolutionized the sector. It has reduced barriers to entry and diversified production and distribution channels for literary works. Blogs and ebooks have emerged as a result, exposing Jamaican writers to wider, previously unattainable international markets online. The inbound books via these same channels put extra pressure on writers in Jamaica to use these same online channels to reach broader audiences.

Regional and international literary conferences are an important means to develop markets and connect with international publishers. At present, there is no funding support to travel to industry conferences. Stakeholders noted an increase in the number of book clubs in Jamaica, which support reader development and raise knowledge, awareness and conversations around Jamaican writers and industry issues. There are opportunities for the government to work with the book publishing sector to create programmes and supports catered to their needs.

4.4 Digital Media Industry

The Jamaican digital media industry has been developing since the 1990s. Digital literacy and global trends have led to wider social acceptance of the sector in Jamaica, further advanced as a result of COVID-19. The digital media sector comprises gaming, animation, eSports, virtual and augmented reality (VR/AR), vlogging, and streaming. Globally, digital cultural products represent the largest source of revenue in the digital economy with JMD \$10 trillion worth of direct-to-customer sales generated in 2013.⁵⁹

Jamaica's electronics and media sector had a market volume of JMD \$5.4 billion, accounting for the country's largest segment of consumer spend on eCommerce in 2020.⁶⁰ Jamaica was considered relatively digitally integrated amongst the Caribbean nations with 102 mobile cellular subscriptions per 100 people, compared with 74.0 subscriptions per 100 people in the Caribbean at large in 2019.⁶¹ Additionally, 10 out of 100 people were subscribed to high speed internet packages, compared with 4.7 subscriptions in the Caribbean in 2019.⁶²

⁵⁹ UNESCO, 'Cultural Times: The first global map of cultural and creative industries', EY, 2015.

⁶⁰ Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

⁶¹ Ibid.

⁶² Ibid.

Stakeholders in the digital sector estimate approximate that there are 500 eSports semi-professional gamers, 10-15 gaming streamers and around 5,000 individuals who participate in eSports in a part-time and/or casual capacity. Meanwhile, Jamaica Animation Nation Network leaders estimate that there are 40 active digital media practitioners (animators, game developers) and approximately 300 generalized digital media practitioners.

Animation has been bolstered by the government through the Youth Employment in the Digital and Animation Industry Project (YEDAI). YEDAI has offered training programmes to youth since its launch in 2014/15, including topics such as 2D and 3D animation, entrepreneurship support and much more. The project has been able to operate through a JMD \$3 billion loan from Korean Trust Fund (World Bank) and has been extremely successful in providing skills training to the animation sector and encouraging the development of Jamaican animation products. Through the COVID-19 crisis, the government turned to the animation sector to develop public service announcements, exposing Jamaica's animation sector to wider audiences across the region. As a result of COVID-19, stakeholders have witnessed an increase in demand animation for advertising, communications, and training purposes.

VR/AR is a relatively nascent subsector in Jamaica. Only a small number of businesses are reported to have VR/AR technologies due to the high cost of equipment and uncertain market demand. The VR/AR sub-sector has been largely supported through private sector use for corporate events and through government use for training simulations including for the Ministry of Defense.

The eSports subsector has been growing in prominence in Jamaica, with a national team managed by eSports Jamaica in 2019. The team travelled to Las Vegas to compete in their first international tournament in 2019, and later travelled to South Korea to compete in the eSports world championship. There are further opportunities for the eSports sector and further its development with partners such as the Jamaica Olympic Association.

Stakeholders have noted the difficulty of securing financing for digital and/or technology-driven products that are built for entertainment purposes. Some have found greater ease in accessing financing from international organisations, further risking entrepreneurs moving their business out of Jamaica. There is an opportunity for the government to collaborate with the digital media sector to determine what supports the sector needs and develop plans to grow and financially-support the sector in future. There is also an opportunity to leverage the skills of practitioners in the digital media sector in other sectors (e.g., cyber security, etc.). Stakeholders suggest that it is common for people who start off as gamers move into more generalized software developers.



4.5 Culinary and Gastronomy Industry

It can be argued that nothing exemplifies 'Brand Jamaica' quite like the island's mouthwatering history in culinary and gastronomy. In 2017, Jamaica's total consumer food service sector generated an estimated JMD \$106 billion in sales, displaying the strong economic value of the sector.⁶³ Jamaica's Hotels & Restaurants industry is said to have employed 102,325 persons in 2018, which represented around 8.3% of the workforce.⁶⁴ Jamaican consumers spent the most on "food & nonalcoholic beverages" of all other forms of spending in 2020 ⁶⁵and approximately 20-50% of the products used in Jamaica's fast-food sector are imported, suggesting that anywhere from 50-80% of ingredients in this subsector are sourced locally.⁶⁶ This local sourcing illustrates a strong local ecosystem for the culinary and gastronomy sector, sourcing from Jamaica's farming and agriculture sectors. As a result of tourist demand for food, the government implemented food import restrictions to preserve the sector from international influence. ⁶⁷

Pre-COVID, the gastronomy sector was bolstered by the Tourism Linkages Network (TLN), who developed a 'Taste Jamaica' app and have helped developed the Agri-Linkages Exchange (ALEX)⁶⁸. The Jamaican Ministry of Tourism has recognized the social and economic value of the sector in simultaneously encouraging tourism while also being further supported and developed by it. Both government and stakeholders have identified an opportunity to build on the success the sector has seen by developing the country as a top culinary destination and place of excellence, such as in developing the Jamaican culinary festival. ⁶⁹

⁶³ Grant, '2018 Jamaica HRI Food Service Sector', Global Agricultural Information Network, 2018.

⁶⁴ Planning Institute of Jamaica, 'Economic and Social Survey', Central Planning Unit, National Planning Agency, 2018.

⁶⁵ Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

⁶⁶ Ewing-Chow, 'The Globalization of Fast Food, Public Health and Why we Should Have an Eye on Jamaica', Forbes, 2019.

⁶⁷ Grant, '2018 Jamaica HRI Food Service Sector', Global Agricultural Information Network, 2018.

⁶⁸ Bartlett, 'Jamaica is the Caribbean's rising star', EUROPEANCEO, 2020.

⁶⁹ Ibid.

4.6 Gifts and Crafts Industry



In Jamaica, the Gifts & Crafts sector is comprised of micro-businesses. Many of the gifts and crafts enterprises have been in service for over 20 years, many of which have been handed down over generations.⁷⁰ Estimates suggest that over 9,940 persons were employed in businesses for craft-related trades and production in 2013. By late 2015, there was an estimated 1,983 self-employed craft traders who worked at 15 resort area craft sites across Jamaica. Whilst these numbers are outdated, they were conservative and did not include employment created through the sale of craft gifts and souvenir retail outlets.⁷¹ In comparison, the UK estimated that more than 32,000 persons are employed in their local gifts and crafts sector.⁷²

The economic importance and historical significance of the gifts and crafts sector in Jamaica is still widely valued by policymakers, as shown by renewed government commitments with the launch of the National Craft Policy in 2020 and the continued development support provided by the Jamaica Business Development Corporation.



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⁷⁰ 'National Craft Policy: An Integrated Approach', Ministry of Industry, Commerce, Agriculture & Fisheries (MICA), 2020.

⁷¹ Ibid.

⁷² Morris Hargreaves McIntyre, 'The Market for Craft', Crafts Council and Partners, 2020. https://www.craftscouncil.org.uk/documents/880/Market_for_craft_full_report_2020.pdf.

The National Craft Policy aims to develop the craft industry into a more viable, sustainable, diversified and internationally competitive sector that is integrated and inclusive. Responsibility to achieve these aims is to be led by MICAFA and JBDC in collaboration with the COJ, BSJ, RADA, DCFS, JIPO, NCRA and the trade board. Some of the sector development activities committed to through this policy document include the creation of a Craft Industry Council under MICAFA to guide strategic and institutional support for the sector, expanded funding to sector agencies, expanded training and capacity building offerings, and enhanced protection of intellectual property.

Stakeholders experienced a contraction of the industry since the turn of the century. It is believed that this is due in part to a flagging reputation for the sector. There has been a notion that the practitioners in the Gifts and Craft sector are only such out of necessity, enforcing a narrative that devalues the artistic skill and creativity required to be a successful artisan.

This prevailing stigma is said to have dissuaded new entrants into the industry and has affected the monetization of indigenous craft products. Industry stakeholders reported an increasing unwillingness of people to pay fair market value for artisan craft products. According to research completed by MICAFA, Jamaican craft products are regularly sold at around JMD \$10,000 and a significant portion of artisans (80%) earn less than JMD \$100,000 per month.⁷³

The industry also faces challenges regarding content creation, research and development, and commercialization. In a 2015 study by MICAFA, 20% of respondents noted that they used imported raw materials in the creation of their products, indicating a growing trend of raw materials being imported from countries who make it cheaper. Research and consultation have also suggested that craft activity within Jamaica has decreased in quality. This decline has occurred in part due to limited R&D on the use of local materials, new processes, and development of distinctive product identities, and a growing focus on creating souvenirs for tourists with little diversity/authenticity. There are concerns that authentic Jamaican products lose their distinct competitive advantage.

Underdeveloped business skills and limited industry knowledge among artisans exacerbate these challenges. In schools, the traditional skills of craft production are not integrated with design, technology, environmental science and entrepreneurship, making the pursuit of craft enterprise an unviable career option for many young people.⁷⁴

Despite these challenges, the sector recognizes the ongoing efforts of JBDC and other support bodies to address the skills deficits and support the development of the sector and have expressed optimism on the commitments made by the National Craft Policy.



⁷³ 'National Craft Policy: An Integrated Approach', Ministry of Industry, Commerce, Agriculture & Fisheries (MICAFA), 2020.

⁷⁴ Ibid.

4.7 Visual Arts Industry



The visual arts sector in Jamaica represents another vibrant art sector of historical and artistic individuality that has allowed Jamaicans to write their own narrative and affirm their culture and way of life through painting, photography, drawings, sculpture, and street art. As previously mentioned, the international visual arts sector accounts for some of the highest levels of employment compared with all CCI sectors. The value of the worldwide art market has remained fairly stable, averaging at around JMD \$9.5 trillion over the last 10 years.⁷⁵ While the sector has been primarily dominated by physical sales and infrastructure over the last decade, online sales have bolstered market activity in recent years and research suggests that the general public has grown increasingly interested in buying visual arts products online.⁷⁶ It is estimated that the worldwide online art market will grow to JMD \$1.4 trillion in value by 2024.⁷⁷

Research on the sector has suggested that, as with many of the CCIs in the Caribbean, a lack of funding has affected the operational stability of the creative institutions that showcase visual arts, such as art galleries.⁷⁸ Additionally, the number of persons going into this sector locally over the years has decreased, adding pressures and undermining the critical mass sought for developing a viable, competitive visual arts sector.⁷⁹

Practitioners in and products of this sector are often considered to fall under the Gifts & Crafts. This categorisation is in fact beneficial as it opens the sector up to a wider range of supports such as those provided by the Jamaica Business Development Corporation, and those soon to be provided by other government ministries through the National Craft Policy.

⁷⁵ UBS and Art Basel, 'The Art Market 2020: Global art market value from 2007 to 2019', Statista, 2020. <https://www.statista.com/statistics/883755/global-art-market-value/>.

⁷⁶ Hiscox, 'Online Art Trade Report 2019', Statista, 2019. <https://www.statista.com/statistics/939236/share-of-art-buyers-worldwide-by-if-they-prefer-to-buy-art-online-or-offline/>.

⁷⁷ Ibid.

⁷⁸ Hendrickson et al., 'Creative industries in the Caribbean: a new road for diversification and export growth', United Nations, 2012, <https://core.ac.uk/download/pdf/45619448.pdf>

⁷⁹ Ibid.

4.8 Fashion Industry

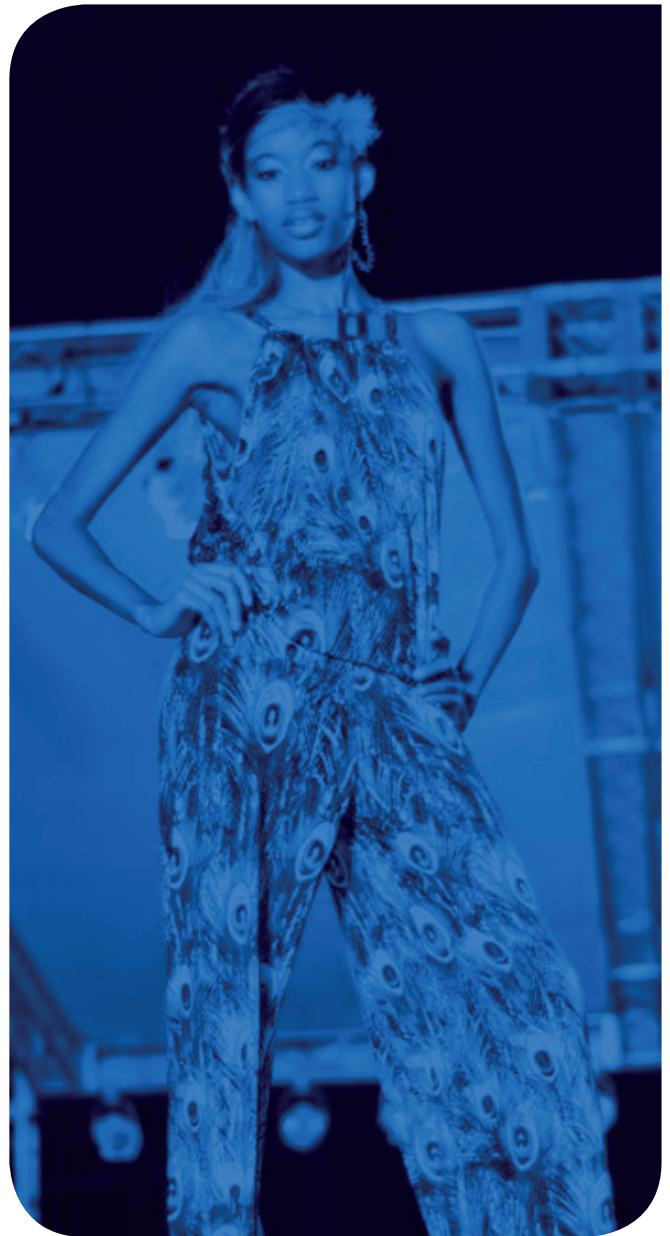
Jamaica has a vibrant and distinctive fashion industry, with its creators drawing upon all elements of the Islands social, cultural, and natural inspiration. The sector has seen an abundance of talent over the years, with many prominent designers, modelling agencies, and models driving the sector forward. Fashion industry sales in the Latin America and Caribbean region have grown at similar rates of 2.5-3.5% in 2019 and 2020, outperforming sales growth in North America (which saw 2.5-3.5% growth in 2019 and only 2-3% growth in 2020) and mature European markets (which saw 1.5-2.5% growth in 2019 and only 1-2% growth in 2020).⁸⁰ This can indicate that the fashion industry in Jamaica is still growing and has not yet reached maturity.

Local Jamaican modelling agencies have been positioning themselves on the international stage for some time. This effort was led early on by the pioneering Pulse modelling agency, which propelled many Jamaicans to international fame and launched Caribbean Fashion Week. It was later joined by Saint International which is also establishing itself internationally and is growing its premier event - StyleWeek Jamaica. Both entities have diversified to cover lifestyle media, communication and television production by securing international contracts for their models.

The sector faces some challenges. Spending on fashion represents the 3rd largest eCommerce segment, holding 27.7% of Jamaica's eCommerce revenues in 2019.⁸¹ These statistics are troubling to local designers and store owners as it represents an increase in the purchasing of cheaper clothes from international retailers online, and an under-valuing of local, Jamaican-made design. In consultations with Jamaican designers, it was stated that they are seeing decreased support from locals in favour of purchasing cheaper, mass made clothing products from production centres like China online.

The digital environment has presented both opportunities and challenges for Jamaican fashion. While operating an eCommerce platform provides an opportunity to reach wider international retail markets for designers, the cost of exports acts as a barrier to fully embracing this form of retail. Designers consulted for this engagement noted that the cost of shipping can cost as much as the retail price of their items, making the option less lucrative to traditional, physical retail offerings. There is an opportunity for the Jamaican government to work to address shipping costs for the fashion sector to improve the sector's adoption of eCommerce technologies.

While the economic value of the fashion sector has long been acknowledged by Jamaicans in popular culture, stakeholders believe there are opportunities to protect the local sector from mass-made global competition and position fashion in Jamaica as a leading sector.



⁸⁰ McKinsey & Co., 'The State of Fashion 2020', McKinsey & Co., 2020. <https://www.mckinsey.com/~/media/McKinsey/Industries/Retail/Our%20Insights/The%20state%20of%20fashion%202020%20Navigating%20uncertainty/The-State-of-Fashion-2020-final.ashx>.

⁸¹ Schlumbohm et al., 'Jamaica World Country Report', Statista, 2020.

4.9 Performing Arts Industry

The performing arts sector in Jamaica is recognised internationally for its music, dance, and folklore. The sector comprises members of the dance, music, drama, comedy, and theatre subsectors. Over a decade ago, Dr. Keith Nurse estimated approx. 1,000 artists and cultural organisations, 100 dance companies and 50 theatre companies active on the island.⁸² Current stakeholders in the industry view the sector as being composed of community groups, church groups, and school groups who operate largely on a voluntary basis, with a couple semi-professional organisations who have been able to support full-time work.

Many members of the performing arts sector operate as freelancers while theatres and companies who own performance spaces have been able to generate revenue through rentals and ticket sales. Stakeholders noted that many performers worked in other professions in order to sustain their livelihoods. Similarly, a number of semi-professional organisations have achieved such status by operating as social enterprises. Tourism has been an important market for this sector, employing many performers (in particular, dancers) on a regular basis before the Covid-19 pandemic. In the early days of the pandemic, some theatre owners began monetising their digital content, including through streaming on Instagram Live among other platforms - but not nearly at the level of actual live performances.

The Edna Manley College of the Visual and Performing Arts is a leader in training and education for the sector, as well as sector policy and advocacy. There are challenges associated with leading the new generation of Jamaica's performing artists due to the dearth of economic support provided to the sector. Similar to the gifts & crafts and visual arts sectors, the performing arts also faces a stigma where the skills of performers are not economically valued. Stakeholders noted many new entrants to the sector having resorted to unpaid roles in order to gain experience, which is a significant barrier for entry to the sector. Stakeholders identified a need to professionalise the sector so performers' time spent on training and improving their craft can be appropriately recognised and valued.

Additionally, there is a need to create better infrastructure for the performing arts in Jamaica. Stakeholders noted a lack of performance spaces outside of Kingston, a call for further investment in the capital, and a need for further infrastructure across the country. In addition, there is little financial support for production and experimentation which constrains artistic development.

⁸² Nurse, 'The Cultural Industries in CARICOM: Trade and Development Challenges', Caribbean Regional Negotiating Machinery, 2006.

5. Opportunities and Challenges

Understanding Jamaica's cultural and creative industries is critical for unlocking the sector's potential. Data, information, and analysis can help improve decision-making by industry and government, and can raise the understanding of the cultural, social, and economic value of the CCIs, paving a roadmap for the opportunities they present for all Jamaicans.

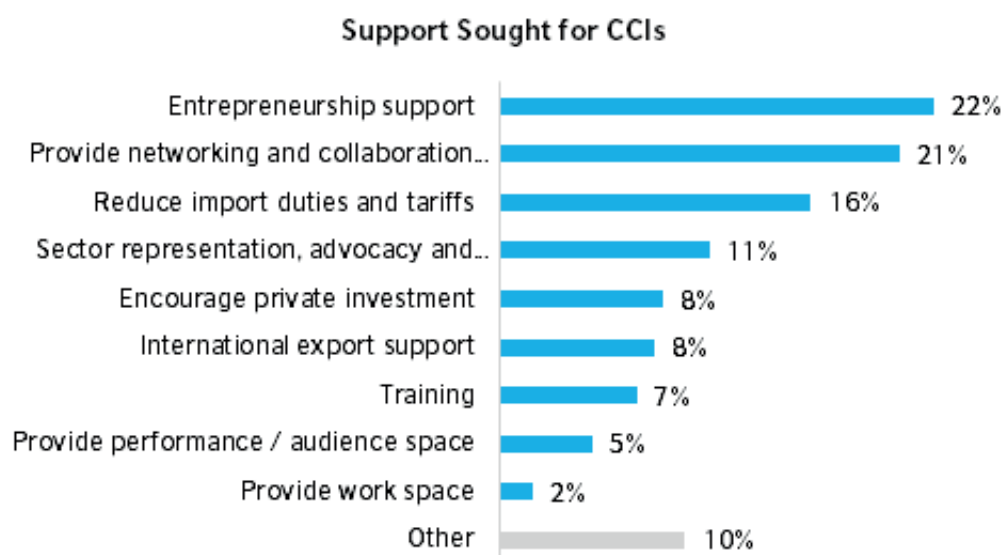
The CCIs operate as an ecosystem of interrelated actors and activities. As such, support for the sector is most effectively delivered in a holistic manner. In this way, the whole is greater than the sum of its parts, where each support would have a greater impact when implemented alongside other supports.

5.1 Industry support

The cultural and creative industries worldwide share challenges in obtaining support and addressing the market failures they face. When seen to be competing for the attention of public support, the CCI's are not recognised for their social return on investment in terms of the economy, health, social justice, and education.

The Jamaican Ministry of Culture, Gender, Entertainment and Sport (MCGES) manages the Entertainment and Creative Industries Registry (E-Registry), a database that stores cultural and creative business registrations. Businesses registered through this forum are then able to access economic benefits such as productive input reliefs. MCGES encourages cultural and creative businesses to register themselves through this database to streamline their ability to access such benefits.

It is international best practices for governments and agencies to coordinate their CCI support structures. In providing a holistic approach to sector development, one intervention can have a greater impact when delivered alongside other interventions – where the whole is greater than the sum of its parts. Nordicity's survey found that support for entrepreneurship was the top priority support sought by respondents (22%), followed by support for networking and collaboration (21%). Support for reducing import duties was a priority for 16% of respondents, followed by sector representation, advocacy and coordination (11%), encouraging private investment (8%), international export support (8%) and training (7%). Support for performance space was sought by 5% of respondents, provision of workspace was sought by 2%, whilst 10% identified other priorities of support sought including support for marketing and discoverability, media coverage, sector research and evaluation.



Source: Nordicity Survey 2020. Sample: n=505

One example of a recently-coordinated CCI support structure can be observed in Canada, with the development of Creative Saskatchewan. Founded as a public funding agency, Creative Saskatchewan supports the economic development of the cultural and creative industries by funding 14 grant forms in support of practitioners and businesses across the sectors. The agency provides a one-stop shop for the book publishing, visual arts and craft, music, film/TV, performing arts, and digital media industries. Funding is tailored to different elements of each industry value chain, and range from supporting the development of new content and ideas, the production of creative and artistic works, and engagement in market development activities such as attending international showcases, tours, and markets. These supports provide creative entrepreneurs with small capital injections to stimulate economic activity, helping them ultimately bring their creative products to market.

5.2 The value perception of the CCIs

The value perception of a sector plays a significant role in its success, particularly regarding policy formation, its talent pipeline and skilled workforce. In Jamaica, as with many other developing nations, the creative sectors are celebrated for their cathartic and entertainment benefits but underestimated for their economic and social contributions. With some exceptions like the film sector, Jamaica's CCI's to date have not been measured in terms of their contribution to GDP, employment, revenues and exports, and fiscal returns to government in taxes. Neither policymakers nor everyday Jamaicans are aware of the value of the CCIs, causing barriers to supportive policy environments nor supportive family and social environments.

In major global creative economies such as the UK, US and Canada, and where the CCIs have government support, the industries have been on a multi-decade journey of promoting the value perception of the industries through mapping and economic and social impact analysis. In a similar spirit, there is a need to increase the value perception of the CCIs in Jamaica. And whilst this value perception requires time and resources, there is a strong momentum and interest in Jamaica from industry and government alike.

5.3 Complete, accurate and relevant industry data

Whilst considerable progress has been made by the government through agencies such as the Jamaica Business Development Corporation and STATIN, there remains a lack of complete, accurate and relevant industry data on Jamaica's cultural and creative industries. This lack of data has led to a limited understanding of the CCI's scope, challenges, opportunities, and impact. It has hindered policy formation and strategy implementation for the sector as neither government nor industry have the data and information required for evidence-based decision-making. As a result, many industry practitioners have had to forge their own path, without sufficient foresight, information, and support.

5.4 Connecting the dots, coordinating the fragmented CCIs, and a unified voice

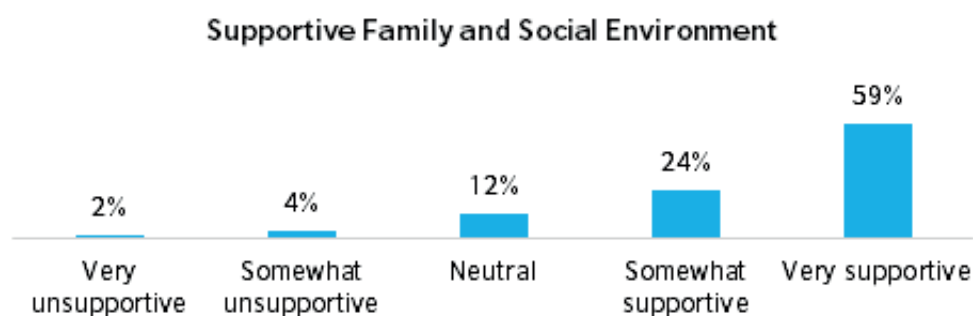
The industry has an abundance of creatives, enterprises and support bodies disaggregated across a myriad of sub-sectors, genres and communities. Whilst this fragmentation is natural for organic grassroots-led creative sectors, it also presents barriers to realising the sector's true potential. In economic terms, this fragmentation has resulted in a market coordination failure, where the full market potential is not realised due to a lack of coordination in information and decision-making.

Moreover, this coordination failure has resulted in confused advocacy and communications between government and the CCIs due to the lack of a unified sector voice. And in many cases where the sectors are less formal or organised, they may not have an opportunity to be heard at all.

In the world-leading markets for the CCIs, the sectors have connected the dots, coordinated themselves and established a unified voice through strong industry associations, governance structures, advocacy, and capacity building. In this way there is a need to coordinate the sector, leverage strengths and connect the dots.

5.5 Family Support

Despite the aforementioned challenges, many survey respondents indicated that their family was supportive of their pursuit of work in the cultural and creative industries. Whilst only 6% indicated an unsupportive family and social environment, interviews and consultations with sector stakeholders suggested that this number may be considerably higher – as the CCI's are not universally accepted as a career choice.



Source: Nordicity Survey 2020. Figures may not sum due to rounding. Sample: n=505

5.6 The Employment Opportunity

The employment opportunity for the CCI in Jamaica is significant. Because of their labour intensive nature, the culture and creative industries are increasingly recognised as future job creators of the world. The CCIs have the potential to create a high number of jobs in short periods of time and absorb labour from declining sectors of the economy.⁸³ Globally, the CCIs account for 29.5 million jobs, employing 1% of the world's active population. The top three employers in the CCIs have been identified as visual arts (7 million), books (4 million), and music (4 million).⁸⁴

The CCI's provide significant transferable skills. Moreover, the transferable skill of 'creativity' itself is expected to represent the types of jobs that are expected to grow most in importance over the next decade.⁸⁵ Nesta found that 'creativity is consistently identified as the most significant predictor for the likelihood of growth for an occupation between now and 2030', while other transferable skills for growth included those highly related to the CCI's including communication skills and team building.⁸⁶

In South Korea, CCI workers have been found to be more independent, educated, and productive than the average, where the productivity of film and television workers was thought to be twice the national average.⁸⁷

The CCI's also play a role in inclusive growth and participation of underrepresented groups. UNESCO research showed that CCI sectors in Europe employed more youth than any other sector, and that women made up more than 50% of people employed in the United Kingdom's music industry despite accounting for only 47% of the active population.⁸⁸ The CCIs are therefore seen as the embodiment of occupations that drive entrepreneurial, inclusive, and sustainable development.

5.7 Inclusive and sustainable development

The CCIs are drivers of inclusive growth and sustainable development. Culture's unique ability to be a connector presents a unique opportunity to engage people from all walks of life. Culture has been referred by the British Council as 'The Missing Pillar' of sustainable development, deserving of recognition alongside the three pillars of development – social, economic, and environmental.⁸⁹ Indeed, culture contributes directly to many of the SDGs, including safe and sustainable cities, decent work and economic growth, reduced inequalities, the environment, promoting gender equality and peaceful and inclusive societies. UNESCO asserts culture's role in sustainable development as a powerful driving factor when placed at the heart of its strategies. Through programmes such as the British Council's Developing Inclusive Creative Economies (DICE) and Cultural Heritage for Inclusive Growth (CH4IG) programmes, the CCIs provide a powerful mechanism for policymakers.

The Planning Institute of Jamaica noted that, given Jamaica's relatively large working age population, its declining child population, the effects of an aging population structure and urbanisation, "the country has the potential to reap a 'demographic dividend' providing appropriate investments are made in human resources for social and economic development."⁹⁰

83 Haans, 'Expected job creation across the cultural industries: a sectoral division and its implications for cultural policy', International Journal of Cultural Policy, 2015.

84 UNESCO, 'Cultural Times: The first global map of cultural and creative industries', EY, 2015.

85 Creative Industries Policy & Evidence Centre. Creativity and the future of skills, Nesta, 2018. https://media.nesta.org.uk/documents/Creativity_and_the_Future_of_Skills_v6.pdf

86 Ibid.

87 UNESCO, 'Cultural Times: The first global map of cultural and creative industries', EY, 2015.

88 Ibid.

89 Nordicity, 'The Missing Pillar – Culture's Contribution to the UN Sustainable Development Goals', The British Council, 2020. https://www.britishcouncil.org/sites/default/files/the_missing_pillar.pdf

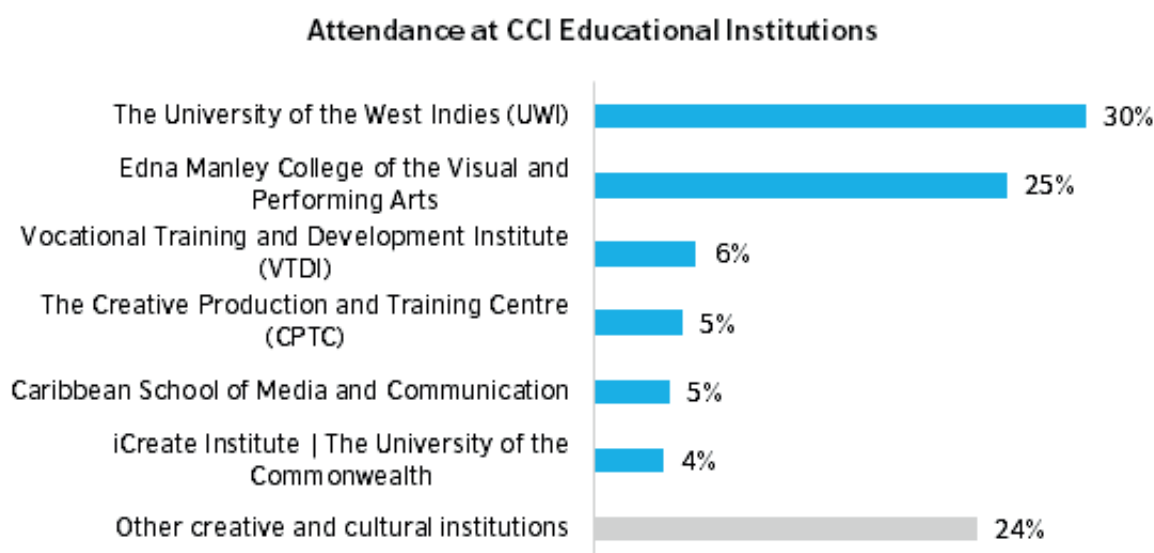
90 Planning Institute of Jamaica, 'Economic & Social Survey Jamaica', 2018.

5.8 Skills, Training & Education

Skills, training, and education provides a foundation for the cultural and creative industries. And as the world turns increasingly towards automation and integrating further technologies, the need for skills, training and education are poised to continue growing.

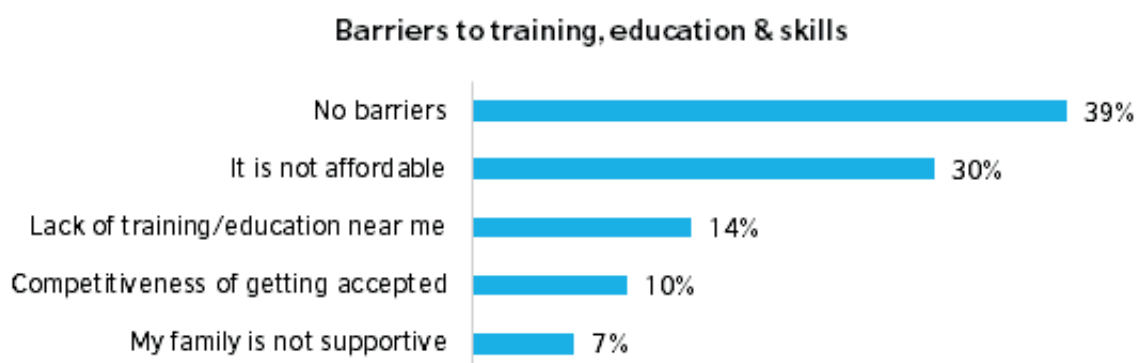
A lack of business skills was identified as a barrier to growth and sustainability by CCI entrepreneurs in this research. Many creatives in Jamaica have reported a need for enhancing their business and entrepreneurship skills. For a sector comprised of many freelancers, artist entrepreneurs and micro enterprises, financing, product pricing and negotiation skills are crucial.

For those survey respondents with a tertiary education in the CCI's, the University of the West Indies (UWI) was attended by the most (30%), followed by 25% who attended Edna Manley College of the Visual and Performing Arts. Approx. The Vocational Training and Development Institute (VTDI) was attended by 6% of respondents, followed by The Creative Production and Training Centre (CPTC) (5%), the Caribbean School of Media and Communication (5%), and iCreate Institute at the University of the Commonwealth (4%). Meanwhile, just under a quarter of respondents (24%) attended other institutions including the Caribbean School of Architecture, Excelsior, HEART, University of East London, University of London, and the University of Technology (UTECH) amongst others.



Source: Nordicity Survey 2020. Sample: n=495

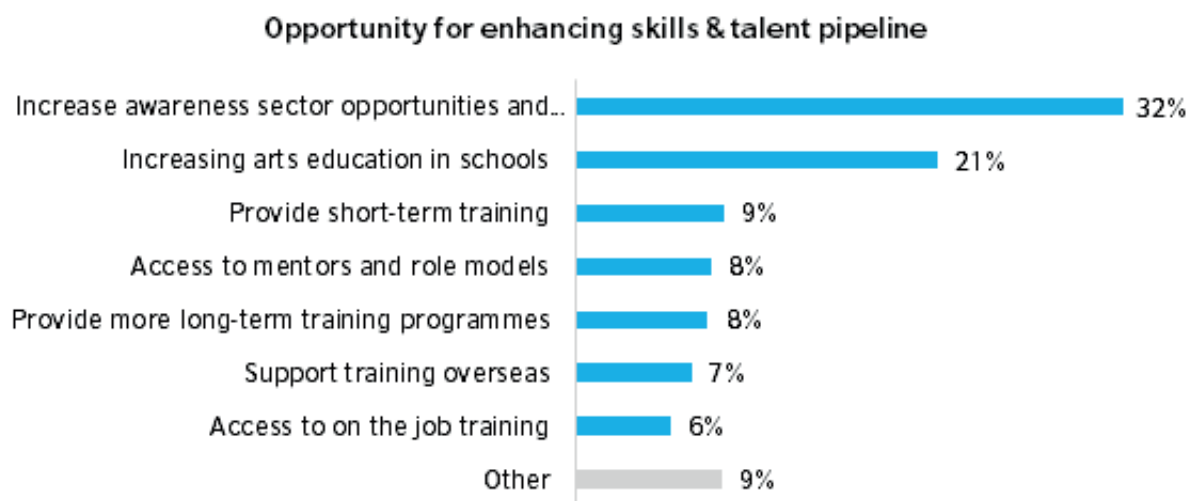
The CCI's in Jamaica face several barriers to skills development. Affordability was the biggest barrier to obtaining training, education and advancing skills, reported by 30% of survey respondents as the biggest barrier to development. Other barriers included a lack of training/education nearby (14%), followed by the competitiveness of being accepted to an institution (10%), and lack of family support (7%). Meanwhile, 39% of survey respondents did not identify any barriers to training, education and skills.



Source: Nordicity Survey 2020. Sample: n=581

There is a significant appetite to enhance the skills and talent pipeline in Jamaica's CCI's. The most promising opportunity for survey respondents was increasing awareness of skills opportunities and resources, followed by increasing arts education in schools (21%). The provision of short-term training was sought by 9% of survey respondents, followed by access to mentors and role models (8%), the provision of more long-term training programmes (8%), support for training overseas (7%), and access to on-the-job training (6%).

Meanwhile, 9% of respondents suggested other opportunities for enhancing the skills and talent pipeline including enhancing the education system and supporting teachers with arts curriculum, updating training curriculum, exploring more practical means of training and education, and better links between education and the cultural and creative industries.



Source: Nordicity Survey 2020. Sample: n=508

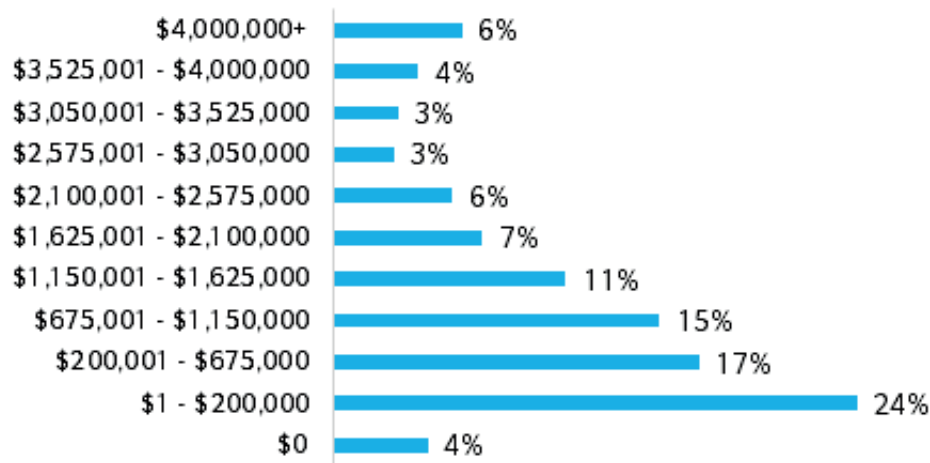
5.9 Market Development and Business Growth

The market development and business growth potential of the CCI's in Jamaica is significant. The sector is comprised of many individual creators and freelancers, alongside a large gig economy. There is an appetite to develop the sector's entrepreneurial and business skills to unlock this growth potential.

Industry income and revenue

A majority of survey respondents earned personal incomes below JMD \$1.15 million per year, with nearly a quarter earning between JMD \$1-200,000 (24%) and 4% reporting zero income at all. This reinforces interview findings that the work of cultural and creative entrepreneurs tends to be undervalued, impacting the ability for practitioners in these sectors to make a sufficient living. Meanwhile, another quarter earned between JMD \$1.2m-2.6m, and 16% earned more than JMD \$2.6m, suggesting that some practitioners were able to achieve considerable earnings from all of their work activities. It is worth noting that this question asked respondents to record their income from all sources, some of which might not originate from their activities in the cultural and creative industries.

Total personal income from all sources by total number of individual survey respondents (2019)

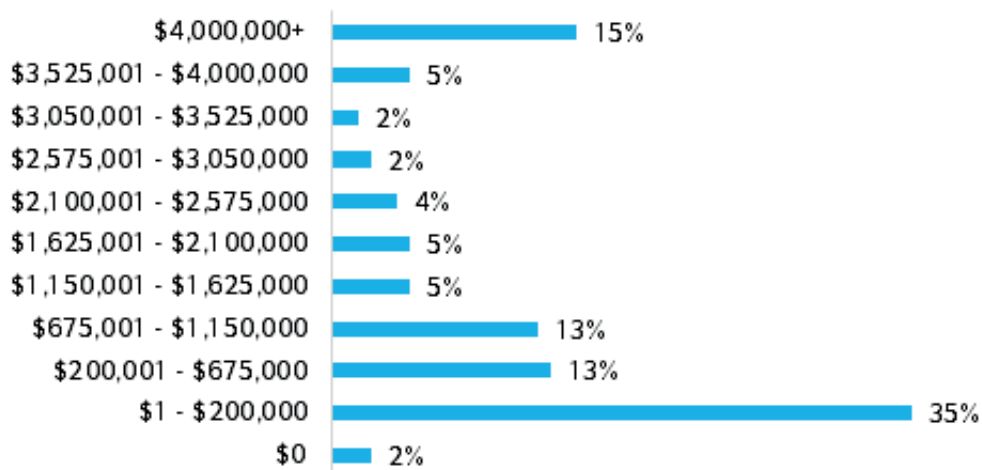


Note: JMD \$ Jamaican dollars. Source: Nordicity Survey 2020. Sample: n=434

Total business revenue for the majority of survey respondents was between JMD \$1 - \$200,000 (35%), followed by those making above JMD \$4 million (15%). This might indicate a gap between the size of businesses in Jamaica's CCI, with many falling into the micro and/or large scale with fewer mid-sized enterprises. This saturation of businesses' making modest revenues further reinforces the perceived undervaluation of the cultural and creative industries in Jamaica.

Jamaica's CCIs are primarily composed of business owners and/or individual artists as illustrated in Section 3.1, of which many describe their roles as being artists/creatives rather than business leaders. This supports the suggestions that there are a number of micro to small businesses that largely comprise Jamaica's CCIs – potentially indicating a large individual entrepreneur and/or freelancer population who might be facing challenges in market development and growth. There is a sector demand for business support in the form of funding and training to encourage growth and sustainability in the long-term.

Total business revenue from all sources by total number of business survey respondents (2019)



Note: JMD \$ Jamaican dollars. Source: Nordicity Survey 2020. Sample: n=128

An overwhelming majority of Jamaica’s creative business survey respondents have earned the majority of their revenues from local sales. Just over half of respondents (54%) who own their own business indicated that 100% of their revenues came from Jamaica sales, whilst 21% have earned at least three quarters of their sales from within Jamaica. The low volume of exports suggests a need for CCI export support. A number of stakeholders consulted noted that the cost to export products can cost more than the value of the sale itself. As such, trying to reach international markets might not be a viable option for some smaller creative businesses.

Jamaica’s cultural and creative industries see opportunities for growth and revenues. The most significant opportunity for growth and revenues was considered market development and sales by nearly a third of survey respondents (31%). Improving sector skills was considered the next most significant opportunity, including business skills (21%), creative and technical skills (16%), improving knowledge of IP and copyright (8%), and digital skills (7%). Meanwhile, increasing international exports was considered the greatest opportunity by 13% of respondents, and other opportunities were considered by 5% of respondents including making more of Jamaica’s national brand globally and developing local markets and local supply chains.

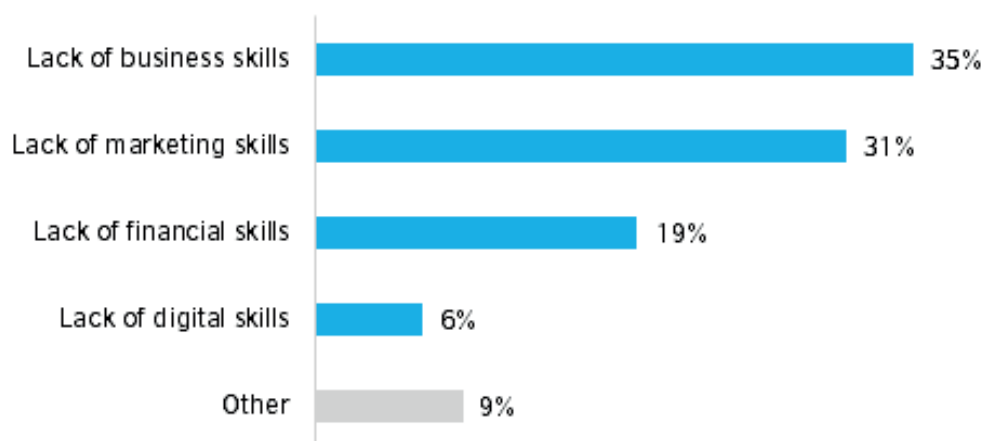


Source: Nordicity Survey 2020. Sample: n=508

Jamaica’s cultural and creative industries face significant barriers to sales and business development. Addressing these barriers can improve Jamaica’s competitive advantage in market development, cited consistently with industry consultations and survey respondents. Whilst a myriad of issues were deemed important, a lack of business skills (35%) and a lack of marketing skills (31%) were considered the biggest barriers to sales and business development, followed by a lack of financial skills where stakeholders struggle with the process of securing financing (19%) and a lack of digital skills (6%). Meanwhile, 9% of respondents suggested other barriers including a lack of global market awareness, audience development and discoverability.

The Jamaica Business Development Corporation (JBDC) has provided significant market development and business growth support to small businesses and start-ups, ranging from guidance on financing and capacity building to project management and market and product development. In response to the Covid-19 pandemic, JBDC launched the weekly ‘In Concert’ capacity building programme. Featuring panel discussions from stakeholders in different CCI sectors, In Concert emerged as a CCI sector mainstay, having since grown to curating ongoing business development training workshops through a Virtual Biz Zone. These results suggest that practitioners may not yet be able to take full advantage of certain training resources, and face barriers including a lack of internet access or shortage of time, and illustrates a need to continue incorporating business skills into CCI programme curricula.

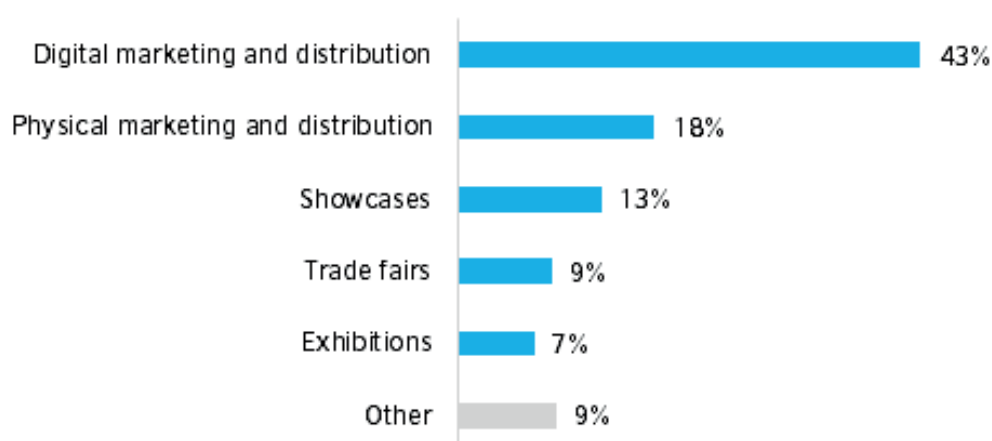
Barriers to Sales and Business Development



Source: Nordicity Survey 2020. Sample: n=508

Further investment in business skills and market development, with a focus on digital, would help advance the CCIs. The Jamaican cultural and creative industries seek a combination of traditional and innovative means of bringing its goods and services to market. Consultations have pointed to discoverability, digital skills, and data as crucial development areas for the sector. The biggest priority was considered digital marketing and distribution, identified by nearly half of the Nordicity survey respondents (43%). Traditional means of market development were identified by just under half of survey respondents, including physical marketing and distribution (18%), showcases (13%), trade fairs (9%) and exhibitions (7%). Meanwhile, 9% of respondents identified other means of bringing goods and services to market, including more international collaborations, co-productions, sponsorships, increasing intermediaries, distributors and wholesalers, and enhancing quality assurance, industry standards, capacity and scalability.

Bringing Jamaican Goods and Services to Market



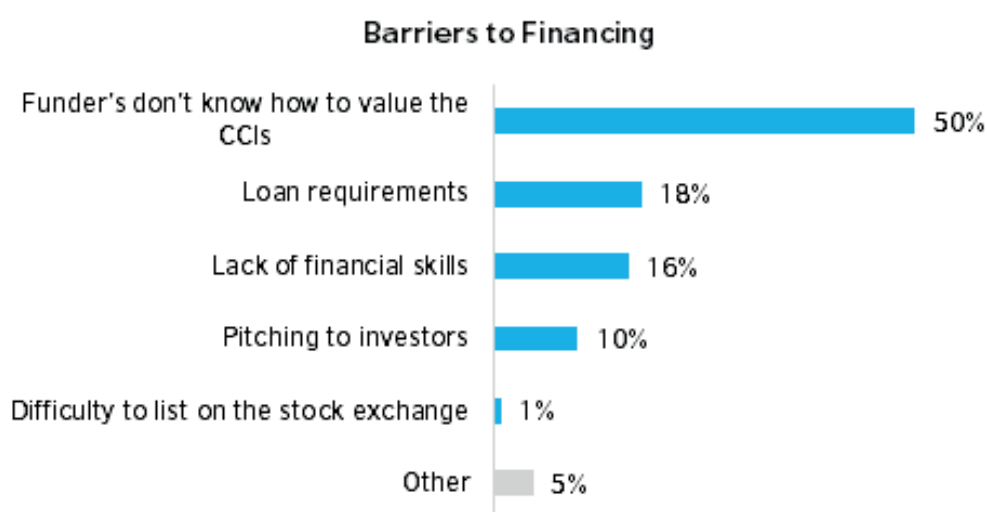
Source: Nordicity Survey 2020. Sample: n=508

5.10 Financing

Access to financing is a major challenge facing the growth and sustainability of Jamaica's cultural and creative industries. A resounding challenge facing Jamaica's creative enterprises was convincing funders and investors of the value of their work. Industry consultations reflected the views of survey respondents viewing the most significant barrier the sector faced in obtaining financing was convincing funders of the value of the sector.

The valuation of cultural and creative intellectual property (IP) was identified as the main barrier to financing by half of the survey respondents (50%). Related to this, meeting stringent or unsuitable loan requirements from lenders was considered the second most significant barrier to financing, identified by nearly one fifth of survey respondents (18%). A lack of financial skills was deemed the third most significant barrier to financing, identified by 16% of respondents, followed by business pitching to investors (10%). Meanwhile, the Planning Institute of Jamaica reports the stock of 'Loans and Advances to the Entertainment Industry at Commercial Banks fell by JMD \$1,890 million to JMD \$2,491 million.⁹¹

Approx. 5% of survey respondents indicated other challenges included a lack of business and entrepreneurship skills and a disconnect between the financial sector and the cultural and creative industries. Whilst only 1% of respondents identified 'difficulty to list on the stock exchange' as the most significant barrier, several key informant interviews revealed this as a significant challenge, particularly for digital and technology oriented creative businesses. Meanwhile, for many cultural and creative businesses, stock exchange listing is unfamiliar and not commonly used as a mode of financing sought.



Source: Nordicity Survey 2020. Sample: n=508

A decisive finding from the industry consultations was the lack of private and public funding support for cultural and creative businesses. Many stakeholders noted that it was uncommon if not impossible to secure start-up financing and general loans from the major financial institutions in Jamaica. This may be because institutions do not know how to adequately define the value of CCI products. A lack of usable, up-to-date data for these sectors has exacerbated their inability to properly value their IP assets and leveraging IP value capture.⁹²

⁹¹ Planning Institute of Jamaica, 'Economic & Social Survey Jamaica', 2018

⁹² Nurse. 'IP value capture: fostering trade by capturing the value of creative industries in developing countries', WIPO Magazine, 2018, https://www.wipo.int/wipo_magazine/en/2018/si/article_0001.html.

5.11 SWOT Analysis

Based on a review of data and insights gleaned from key informant interviews and the results of the national CCI survey, a series of strengths, weaknesses, opportunities, and threats were identified characterizing Jamaica's cultural and creative industries.

Strengths	Weaknesses
• Storied indigenous local creative sector ecosystem (e.g., film, digital media, Gifts & Crafts, Fashion) • Many government agencies and bodies tasked with supporting different parts of the ecosystem (e.g., IP protection through JIPO, capacity building through the JBDC). • An abundance of creative talent • A highly collaborative sector, supportive of partnerships and co-productions • Kingston designated a UNESCO Creative City of Music. • Multiple locations across the island have been awarded UNESCO heritage designations – signaling the strength of Jamaica as a cultural heritage location. • English-language and cultural resonance globally • Global demand and appreciation for Jamaican and Caribbean culture • Introductory film sector incentives (tax reliefs), and the decision to create a Film Fund • Increased sector support and representation at institutional levels • Strong diaspora community which advocates on behalf of the Jamaican cultural sector	• Disaggregated value chain (reliance on imports) • Fragmented representation at government level (i.e., parts of the CCI value chain covered at different government ministries, making communications confusing and timely) • Import barriers and tariffs (Tools of Trade) • Constraints of global stereotyping of Jamaican culture • Limited sector data, monitoring and evaluation • Limited financing available to entrepreneurs in the CCIs • Private financing/investment lacks understanding of value of CCIs • Limited local market and distribution channels for CCI products • Shortage of flagship cultural and creative enterprises (anchor companies) • Lack of business services tailored to CCIs (e.g., accounting) • Lack of market coordination • Underdeveloped business culture and international standards • Devaluing of artistic/creative work by locals common
Opportunities	Threats
• Enhancing the IP regime and national revenues • Negotiate with foreign trade partners to further IP protection, set up co-production treaties and build trade deals. • Increase domestic/indigenous production and market • Use culture as a means for economic development and inclusive growth • Create an ecosystem that supports innovation and expansion beyond existing cultural successes (global expectations / stereotypes) • Develop economic impact assessment of Jamaica's CCIs • Develop a national CCI strategy with input for local stakeholders • International collaboration and production (e.g., partnerships, co-investment, co-production treaties) • Digital production, distribution, and consumption • Enhance "Brand Jamaica" to include a wider variety of cultural products • Create a national campaign to encourage funders/ corporate businesses to understand the value of creative products.	• Supply chain disruptions (domestic and international) • Related industries face challenges (e.g. decrease in tourism) • Erosion of the value of Jamaican culture • Loss of Jamaican cultural heritage (techniques, tradition and culture) • International competition, facilitated by inbound culture online • IP misuse (e.g. theft) • Erosion of Jamaican industry infrastructure (e.g. to global or digital infrastructure / powers) • Lack of innovation • Lack of commercialization • Barriers to international mobility of people, goods, and services

6. Recommendations for Sector Development and Sustainability

This mapping of the cultural and creative industries leads to certain conclusions and recommendations for further CCI development in Jamaica. Though this project was not mandated to make policy, programme, or structural recommendations, the evidence amassed through the research has led to conclusions and corresponding recommendations to further support the growth of the CCIs in Jamaica. This report provides a framework for direction, commitment, and action towards such a long-term growth strategy.

This section begins with an assumption as to the ambition for the CCIs in Jamaica, and then explores the future development into several key areas of focus. From these areas we develop specific objectives and actions to consider for the sector, JBDC and other authorities. While the timelines can be conveyed in broad strokes, these recommendations do not constitute an action plan or roadmap. As such, the establishment of roles, responsibilities, and priorities are anticipated for future phases of work.

The long-term ambition is for a growing and sustainable Jamaican cultural and creative sector that fosters inclusive growth and social benefit for all Jamaicans. There is an opportunity to place the CCIs front and centre of Jamaica's future as a core expression of the nation's culture. It is to be recognised for the important economic role in the modern, international economy, and a desirable driver of employment and social benefit.

6.1 The Power of Measurement

This report is replete with facts and figures in an attempt to scope the size and role of each of the CCI sectors. The first question is what needs to be measured? In other words, which activities constitute the CCI sectors in Jamaica? Guidance from UNESCO and abroad indicates that there is some commonality as to what the CCIs are, and that is a start. However, internationally it is recognised that definitions indeed do differ across countries – and local context is crucial in this. Jamaica has thoroughly explored that question and has responded with well-founded specific CCI classifications.

The vast amount of effort to quantify each CCI sector is demonstrated in this report, as there has long been a recognition in Jamaica that 'what gets measured gets attention'. However, it is clear from the difficulty in sifting through various accountings of each CCI, that a more robust accounting for the cultural and creative industries is needed. There is a need to standardise and create processes that provide regular time series measurement of the progress of the CCIs together as a sector and individually. The CCI sectors, though widely different, need key performance indicators (KPIs). Otherwise, it is difficult to measure progress, or the impacts of industry and government measures.

How many people are employed, at what level; how much is the sector actually exporting; what is the economic and labour impact of the sectors - all form part of the basic measurement tools. Again, it is not a tabula rasa, as more robust accounting would be building off the momentum of recent research and data initiatives within Jamaica by the Ministry of Culture, STATIN, JBDC, PIOJ, and JAMPRO amongst others. Further research and analysis are needed to support the growth of the sector, particularly to be authoritative in terms of impact on society and the economy. The recent UNESCO funding awarded to JBDC will help it usher in the next phase of research with economic analysis of Jamaica's CCI's in collaboration with other Caribbean countries.

Collection of data can be expensive and tedious for CCI practitioners. New platforms and collection tools can facilitate future efforts. As well, the development of a data strategy that would support the KPIs required to measure performance. There are various collection points when administrative data are sought for other reasons, upon which data can be collected or analysed as part of the requirement for this information for other purposes. Government agencies and industry associations would be at the forefront in such collaborative exercises, as they have the most to benefit from more accurate recording of CCI activity.

6.2 Setting the Institutional Infrastructure

The widespread nature of this study has produced CCI sub-sector profiles (or mapping). Each sector operates with some formal or informal strategy for development with different supporting mechanisms. Alongside a robust KPI and data infrastructure, a coordinated and collaborative institutional infrastructure should be fostered.

There is a wide range of government agencies addressing different needs – from entrepreneurship training and export permitting to regulation and inspection, and many more. There are as many as nine ministries and agencies with strong mandates and programmes for various parts of the CCIs. Best practices globally indicate the advent of “matrix management” whereby agencies with different mandates but each involved with different aspects of a CCI ecosystem need to collaborate. While no attempt was made to evaluate Jamaica’s performance in that regard, there certainly is strong evidence of collaboration and respect for complementary institutions.

The difficulty for the CCI sectors is that they are so disparate, and the practitioners are often quite automatised as single creators or micro-enterprises of one or two people. Even within each CCI sector exists a whole series of subsectors based on genre, geography, and other factors. Consequently, there should be some attention to umbrella institutional arrangements – both on the government as well as on the CCI practitioner side. Without recommending specific mechanisms, a single CCI forum should be considered. Its purpose would be a first layer of developing greater collaborations, starting with a data strategy as discussed above.

At the CCI sector level, the study team encountered very dedicated and highly capable sector leaders operating within very small budgets on behalf of their constituencies. However, the financing of these member-based associations was not strongly ingrained in the organisations’ ethos. Members paid little or nothing, which is partly a function that members were often operating with cash flow constraints. Nevertheless, part of a strong institutional infrastructure means advocates who can achieve results, which require good data, sound policy positions, and the ability to speak with one voice to government representatives. Thus, there is a symbiotic relationship between organising inside government as well as within the CCI sectors themselves.

6.3 A Digital Lens

With measures to develop the data and institutional measurement systems underway, it is useful to consider two important overriding and complementary trends in the CCIs – and for all industries for that matter. That is the continuing disruption caused by digital technology, accelerated by COVID-19, and the interrelated globalisation of the CCI industries. There are both challenges and opportunities in the context of these trends, but the important conclusion is that there is no going back – a response is a must.

Digital technologies are changing the way in which business and the arts are done, especially at the consumer end. Early in this evolution will be continuing pressure for more access to broadband, as there is a gap between high and low speeds. As a government-wide issue, broadband infrastructure can help to close the gap for numerous educational, informational, social, and economic reasons.

The CCI sector is right in the middle of these issues as the digital conduit to culture and content globally – music, film, television, games and more. Those same content and promotional opportunities work the other way, of course, and many Jamaican creators are taking advantage of these communications links.

That means first, that any support for the CCIs must consider the impact of digital, so the support should be on the digital transformation of the sectors where audiences or customers must be reached and promoted. It also means that second, every CCI sector needs a strong and authentically local ecosystem to strengthen each sector - which should again dictate policy measures.

As well as the more traditional development considerations, there should be a wide recognition that a CCI digital strategy is needed, or at least, all policy and investment should be viewed through a digital lens. This perspective should be brought to the table to buttress all other initiatives.

6.4 Major CCI Streams

With the data and institutional infrastructure in place, and the overriding view of a digital strategy in mind, each of the CCI sectors can be addressed independently. However, there are other cross-cutting streams or areas where objectives, authorities, and actions can be plotted. The key is to find the optimal point between pan-CCI initiatives or subsector-specific initiatives. Obviously, a Film Fund is not the answer for those in the culinary arts, and there will always be a case for industry-specific instruments. Meanwhile, the overriding theme is to design any initiatives within an overall framework that supports entrepreneurship, agility, and sustainability in the CCI sectors.

The main CCI support areas for industry-specific, or multi sector, mechanisms in broad terms are:

- **Financial capital** – in most surveys of CCI activities anywhere in the world, financing is often at the top of the list. Clearly, within the constraints of government funding – especially in times of a pandemic – the answer is more funding from more places. That means the right incentives to pull in private sector (domestic and foreign) investment.
- **Skills development** – there is an array of skills development institutions – both private and public. Due in part to cost and geography, access to skills development institutions remains a barrier. Priorities are sector specific training and across the board development of business acumen.
- **Marketing, discoverability, and export** – Market development and marketing at the enterprise level is critical, both at home and abroad. Discoverability is the key tool of the Internet, which means smart digital ad campaigns, better placement of Jamaican products in search engines, and sound use of social media. Aside from better local recognition, the key to market success is to use those digital tools to develop foreign markets.
- **Value of IP** - Understanding of the value of intellectual property (IP), strengthening its protection, and seeking out better terms of trade for Jamaican IP are goals for the development of the CCI sector. The complexities of IP rights for the creative industries like music and film/tv are extremely important to understand for maximising their value.

There are many specific initiatives that underlie these themes. Each should take advantage of existing Jamaican skills and initiatives to form stronger partnerships and coherence within governments, educational institutions, non-profits, and businesses. That would include those institutions directly relevant to the CCI sector, as well as related sectors like tourism.

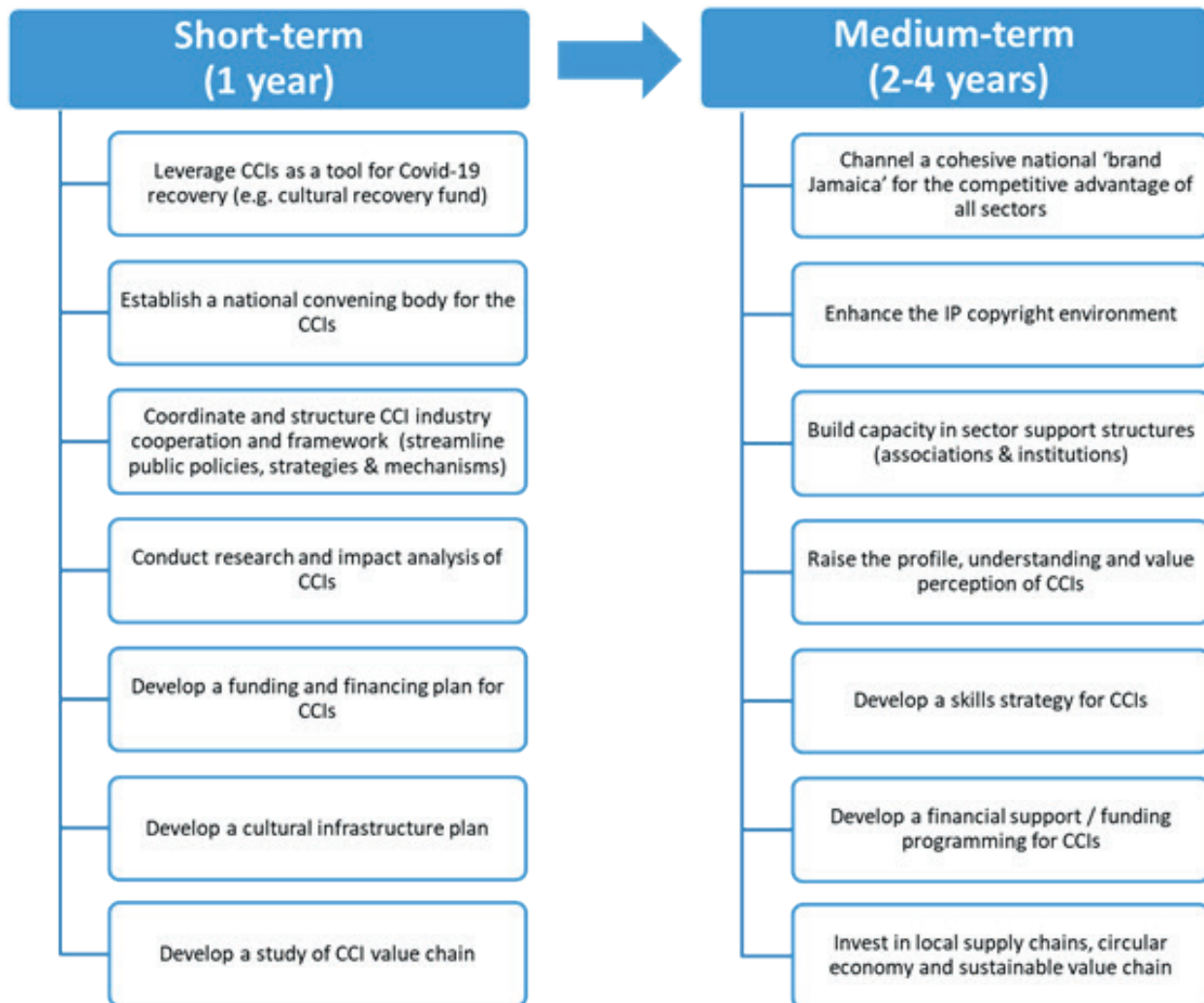


Figure 2: Summary of Recommendations

While this report avoids action plan recommendations, it does identify many potential initiatives which could be explored as to impact, cost, feasibility, and other implementation considerations such as roles and responsibilities. The chart above places potential initiatives into a basic short- and medium-term timeframe representing a first step to road mapping the sector development. Each of these recommendations has the long-term ambition of achieving the outcome and impact of a thriving and sustainable Jamaican CCIs that foster inclusive growth and social benefit for all Jamaicans.

Advance the CCI policy and sector coordination

1. **Establish a national convening or umbrella body representing and supporting Jamaica's cultural and creative industries.**
 - » Coordinate the CCI sector (addressing the industry fragmentation)
 - » Coordinate government approach (convening the multiple government departments and agencies that represent elements of the CCIs)
 - » Represent the sector to government and decision-makers.
 - » Provide industry guidance, information and signposting.
 - » Coordinate a calendar of events (events calendar clash).
2. **Coordinate and structure the CCI industry cooperation and framework.**
 - » Consider a Creative Economy Act and other governance measures to streamline policies, strategies and

mechanisms across the 8 government departments related to CCIs and other support bodies.

3. Develop a skills strategy for the CCIs.

- » Conduct a strategic review of the specific skills requirements in Jamaica's CCIs
- » Mentorships and apprenticeships
- » Work placements
- » Partnerships with UK for accreditation scheme (e.g., ScreenSkills)
- » Specific training and upgrading skills (incl. business skills and digital skills)
- » Provide financial and guidance support for professional development.

4. Develop a cultural infrastructure plan for Jamaica's CCIs.

- » Convene a network of venues, workspaces, studios and other physical spaces and infrastructure.
- » Establish online platforms designed for CCIs to improve their e-commerce, discoverability initiatives, and data intelligence on consumer behaviour
- » Support small and medium-sized cultural infrastructure.
- » Link the physical infrastructure initiatives to digital infrastructure initiatives (incl. broadband)

5. Grow the CCI ecosystem and advance Jamaica's CCI value chain.

- » Develop value chain linkages across the sector, including networks and relationships domestically and internationally. Foster sustainability within the Jamaican CCI ecosystem and stimulate local supply chains, local networks and local resources, tools and materials.
- » Encourage circular economy working. Promoting a business culture that values and celebrates environmentalism.
- » Support Jamaican businesses with importing and exporting cultural and creative goods and services. Reduce friction with cross-border working. For example, enhance fiscal incentives and waivers of customs duties, such as Tools of Trade.

Research, measure, and advocate on behalf of the CCIs

6. Raise the profile, understanding and value of the CCI's in Jamaica.

- » Develop a more documented basis for monitoring and measuring the CCIs in Jamaica. For example, economic impact analyses for key subsectors, and synthesizing the results across sector.
- » Develop a cultural and creative industries pan-sector federation or umbrella body to support coordinated efforts across the sector in a joined-up approach (e.g., developing sector strategies, engaging with policymakers, supporting sector development and sustainability)
- » Use marketing and positioning to change the perception of CCIs .
- » Promote the CCIs as an opportunity for education, employment and entrepreneurship (incl. via highlighting career paths and roadmaps)
- » Increase the national appreciation for and understanding of Jamaica's CCIs (social, cultural and economic value)
- » Channel a cohesive national 'Brand Jamaica' for the competitive advantage of Jamaica as a whole
- » Embed the CCIs in a national coordinated approach to advancing 'Brand Jamaica.'
- » Promote Jamaican industries together internationally (culture, tourism, gastronomy, etc.)
- » Increase the international commercialisation of Jamaican CCIs.

7. Undertake further research and ongoing monitoring and evaluation of Jamaica's cultural and creative industries.

- » Undertake an economic impact analysis to assess the contribution of the CCI's to Jamaica as a whole
- » Undertake research to assess the value of 'brand Jamaica'.
- » Undertake deep-dive research into the state of skills, training and skills in Jamaica's CCIs, and the development of a sector skills strategy.
- » Undertake research to conduct CCI supply chain mapping and value chain analysis across the sector ecosystem.
- » Develop an inclusive national definition and framework for the CCIs.
- » Research the relationship between the cultural and creative industries and social enterprise, exploring the opportunity for the CCI's to support developing economies and inclusive growth.

Support the sectors through interventions

8. Enhance the IP and copyright environment for Jamaica's CCIs.

- » Enhance the sector's awareness, understanding and skills in IP and copyright.
- » Enhance the public's awareness and appreciation of IP and copyright.
- » Provide artists and creative enterprises with legal support (e.g., CCI legal aid)
- » Provide an alternative means for dispute resolution (e.g., a tribunal or ombudsman, or could amend the existing Copyright Tribunal)

9. Leverage the cultural and creative industries as a tool for Covid-19 recovery through various public sector departments, interventions, supports and investments.

- » Tailor and make COVID-19 funding available to the cultural and creative industries.
- » Launch a COVID-19 recovery programme.

10. Build capacity in the sector support structures, representative bodies, industry groups and associations.

- » Capacity development through strategic partnerships and engagement with international partners.
- » Develop a network of industry associations and groups
- » Facilitate human-centred co-design of training and support for industry groups.
- » Facilitate financial support for industry groups. For example, developing sustainable revenue models for industry groups and associations.
- » Encourage ongoing research and analysis of the subsectors, stakeholders and trends. For example, consultations and surveys of group membership.

11. Advance the availability of financial support.

- » Financial and business support for travel (to markets, events, festivals, conferences, meetings, touring, showcasing, support)
- » Financial and business support for marketing and sales activities (physical and digital development of promotional materials and activities)
- » Financial and guidance support for R&D and commercialization (seed funding for development, creation, market testing, commercialization, productisation, industrial design)

12. Foster entrepreneurship and business in the CCIs

- » Develop an entrepreneurship/business skills programme. For example, fellowship, course, mini-MBA, etc.
- » Reinforce the connections with educational partners. For example, leverage UWI, the Kingston boot camps, and other educational resources with the CCI work force.
- » Develop a CCI export framework.

13. Develop a funding and financing plan for Jamaica's CCIs.

- » Devise what the cross-discipline activities would require, such as business training, and the sector specific ones.
- » Map, signpost, communicate and tailor existing business funding and support to be more accessible and suitable for the CCIs.
- » Educate funders and financiers on the value of IP (e.g., IP valuation and collateral framework to increase investment, access to finance and capital)
- » Deliver business skills training, including finance and accounting for creatives

As an operational approach, these areas could be reviewed by a series of stakeholders (such as in committees). That could be an outgrowth of the newly granted IFCD funding as a start. It would also be opportune to integrate the CCI work within the context of COVID-19 recovery support systems.

7. Appendix A: Contributors

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8. Appendix B:

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9. Appendix C: Planning Institute of Jamaica CCI Framework

Medium-Term Socio-Economic Policy Framework 2018-2021 Goals and Actions to Develop Jamaica's Cultural and Creative Industries

Goal:

Develop the Creative Economy and Create a Framework for a Coordinated and Structured Cultural and Creative Industries

Actions:

1. Finalize and implement a National Policy on Culture and the Creative Economy of Jamaica;
2. Develop and enact the Jamaica Creative Economy Act;
3. Fully establish and operationalize the National Cultural and Creative Industries Council (NCCIC) to support the development of cultural and creative industries;
4. Establish a Creative Skills Council; and,
5. Advance the implementation of the National Registry of Entertainment and Creative Industry Practitioners.

Goal:

Develop Mechanisms to Support Capacity Building and Business Development in the Cultural and Creative Industries.

Actions:

6. Establish a Culture and Creative Industries Fund;
7. Advocated for an equitable trade system to remove impediments to free movement experienced by entertainment practitioners;
8. Implement the Jamaica Creative 100 programme; and,
9. Support entrepreneurship in the culture and creative industries, in the communities around the Blue and John Crow Mountains World Heritage Site.

Goal:

Establish systems, structures, mechanisms and other arrangements for local and global marketing, promotion and distribution of Jamaica's cultural and creative products and services.

Actions:

10. Establish digital distribution and promotion platform for Jamaican music, video and fashion; and,
11. Establish a Kingston Creative Media Village.

Goal:

Strengthen data, statistical and monitoring and evaluation systems for Jamaica's cultural and creative industries.

Actions:

12. Establish a Culture and Creative Industries Satellite Account (to make available statistics on Jamaica's creative economy).

Source: Medium Term Socio-Economic Policy Framework 2018-2021, Planning Institute of Jamaica

Nordicity

Nordicity is an international consultancy providing research and evaluation, strategy, policy and economic analysis for the arts, cultural and creative industries.

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