FINAL DRAFT REPORT

Economic Impact Study for Jamaica's Film, Animation and Music Industries

Prepared by

A-Z Information Jamaica Limited

for

Jamaica Promotions Corporation

A-Z INFORMATION JAMAICA LIMITED

The e-Biz Centre | 2 Trafalgar Road | Kingston 5| Jamaica | West Indies

T: (876) 927 6137 | (876) 997 9489 | F: (876 946-0236

Email: noelwatson@azinfojam.com | info@azinfojam.com |Website: www.azinfojam.com

PROJECT TITLE:	**ECONOMIC IMPACT FOR JAMAICA'S FILM, ANIMATION AND MUSIC INDUSTRIES**	
COUNTRY:	JAMAICA	
	CONTRACTING AUTHORITY	CONTRACTOR
NAME:	JAMAICA PROMOTIONS CORPORATION (JAMPRO)	A-Z INFORMATION JAMAICA LIMITED
ADDRESS:	18 TRAFALGAR ROAD KINGSTON 10 JAMAICA	THE E-BIZ CENTRE, 2 TRAFALGAR ROAD, KINGSTON 5 JAMAICA
TEL. NUMBER:	876-978-7755	876-997-9489
WEBSITE:	HTTPS://DOBUSINESSJAMAICA.COM	WWW.AZINFOJAM.COM
EMAIL ADDRESS:	SWILLIAMS@JAMPROCORP.COM	NOELWATSON@AZINFOJAM.COM
CONTACT PERSON:	SANDRA WILLIAMS	NOEL WATSON
COMMENCEMENT MONTH: OCTOBER 2019		
DATE OF REPORT: 14TH APRIL 2021		
AUTHORS OF REPORT: NOEL WATSON, MIRANDA ALLBROOK, DENISE LEANDER-WATSON, PHYLLIS ALLBROOK		

Table of Contents

Table of Figures

List of Acronyms

Acronyms	
AAA	Advertising Agencies Association of Jamaica
AR	Augmented Reality
CCI	Cultural and Creative Industries
CSME	Caribbean Single Market and Economy
ETC	Employment Tax Credit
EU EPA	European Union Economic Partnership Agreement
FAM	Film, Animation and Music
GDP	Gross Domestic Product
IP	Intellectual Property
JACAP	Jamaica Association of Composers, Authors and Publishers
JAFTA	Jamaica Film and Television Association
JAMCOPY	Jamaica Copy (Digital Print Copyright Organisation)
JAMMS	Jamaica Music Society
JAMPRO	Jamaica Promotions (Jamaica Investment & Promotions)
JANN	Jamaica Animation Nation Network
JARIA	Jamaica Reggae Industry Association
JAWS	Jamaica Writers Society
JFM	Jamaica Federation of Musicians (JFM)
JFMAU	Jamaica Federation of Musicians and Affiliates Union
JIPO	Jamaica Intellectual Property Office
JMD	Jamaican Dollars
MCGES	Ministry of Culture, Gender, Entertainment & Sport
MSME	Micro Small and Medium Enterprises
MUJF	Music Unites Jamaica Foundation
PIOJ	Planning Institute of Jamaica
PIR	Productive Inputs Relief
R&D	Research and Development
STATIN	The Statistical Institute of Jamaica
ToR	Terms of Reference
VR	Virtual Reality
WIFTA	Women in Film and Television Association
WIPO	World Intellectual Property Office
XR	Extended Reality

Executive Summary

The current assignment commenced in August 2019 after A-Z Information Limited was successful in its response to a Request for Proposal by JAMPRO. The three-pronged objective of the assignment as outlined in the Terms of Reference was as follows:

1) provide a comprehensive account of the practitioners in the FAM industries;
2) quantify their contribution to those industries; and
3) quantify the economic impact of Jamaica's FAM industries.

The ToR acknowledged the fact that there is an "extreme dearth of current data on the sector. In many cases, no baseline data was provided with which to measure impact of any recommendations implemented". This was confirmed by the Consultants during their efforts to find such data and information during this study. Many practitioners in the FAM industries, especially in music, choose to be somewhat informal with respect to their operations in order to minimize the extent to which they have to divulge information about their business. With this mindset of secrecy, it is virtually impossible to make contact with or collect information from such practitioners about their contribution to the industry.

Despite the lack of baseline data and the low propensity of practitioners to divulge information, the Consultants found that there were many knowledgeable stakeholders operating in or on behalf of the FAM industries. These stakeholders included:

- Industry practitioners
- Industry Associations
- JAMPRO, The Ministry of Culture, Entertainment, Gender & Sports
- Other Government Agencies.

Apart from examining previous studies and other secondary sources[1], the main approaches used in this study involved:

- working with these knowledgeable stakeholders to provide critical macro level industry information as well as to direct us to other key stakeholders who are informed in various niches of the FAM industries
- seeking the assistance of these knowledgeable stakeholders in disseminating specially designed online data collection instruments to their membership listing as well as to other practitioners
- collaborating with them to extract from the internet valuable information available on the FAM industries, especially in the Music Industry
- seeking their validation of findings as they emerged during the research process.

[1] See Chapter 2 of this study for the details of the literature review.

Impact of the COVID-19 Pandemic

The COVID-19 pandemic has intervened since the commencement of this study and has created a major challenge to FAM industries. The Film and Music industries, which are the two larger FAM industries, have arguably been affected more than any other industry/sector due to protocols associated with the pandemic, such as social distancing and limitations on public gatherings. These factors combined with arguably unavoidable Government lockdown requirements, have brought much of the economic activity in the Music industry in particular to a standstill. Most practitioners in the Music industry, which for Jamaica is the largest of the three FAM industries, depend on live performances to generate their income. The consequences are therefore self-evident if there is a lockdown on all such events. To some extent, some astute players in the industry have managed to pivot and use online modalities to continue earning an income or to maintain their brand. However, from discussions with stakeholders and practitioners, the pandemic has reduced the earnings of most practitioners in the Music industry to zero. Some have been driven out of business and have even had to sell their equipment, migrate or resort to other economic activities to survive. In many cases the realities have been harsh and stretch well beyond the economic impact on the practitioners themselves. The impact reaches their families and communities, who are sometimes directly dependent on the income earned by the practitioners or indirectly dependent on the economic activities (multiplier effects) generated by the Music industry.

The Animation Industry, which is by far the smallest of the FAM industries, seems to have been less affected by the COVID-19 pandemic given the nature of its operations which do not require live performances. In fact the Animation Industry has seemingly benefitted because the Film Industry has in many cases had to utilize animation as a substitute for live content. No definitive conclusion can be reached on the net effects of the pandemic on the Animation Industry.

COVID-19 had an impact on the execution of this project due to the uncertainties it created and the adjustment process that most entities required. However, there was no need for a significant methodological change. The study was not intended to assess the impact of COVID-19 but was intended to assess the economic impact of the FAM industries in the pre-pandemic period. The consultants therefore collected data and information based on the situation in Jamaica prior to COVID-19. However, given that economic activity in FAM industries declined so precipitously after the onset of the pandemic, by default the study also provides an indication of the impact of the pandemic.

The uncertainties created by the pandemic and the necessary adjustments that have been taking place make it very difficult to predict the following:

- How long it will take for FAM Industries, especially the Music and Film industries to recover given that a) on the supply-side some practitioners have "pivoted" to other activities and have even sold their equipment and b) on the demand-side persons have found other digitally-oriented ways of being entertained while others may remain fearful of large gatherings for some time to come.
- How the FAM industries will be structured after the pandemic – how many players will exist? Will new dominant players emerge? What new sources of income generation will be available? How will the pricing structure in the FAM industries be affected?

Literature Review

The literature review examined previous work conducted on the Jamaican Cultural services industries including the Vanus James report of 2007, conducted on behalf of WIPO. It also included an examination of economic impact assessments carried out in other countries. It was agreed with JAMPRO that the approach used by Nordicity in conducting economic assessments on the Film Industry would be used in this study. This approach involves:

- Using survey data to generate direct contributions to the industries by contributors - direct contributions are those made directly by practitioners in the industry and is reflected in their earnings from live shows, Intellectual Property Rights, etc.
- Using various techniques such as multipliers or the Leontief Inverse matrix to estimate indirect contributions and induced effects - Indirect contributions are those that accrue within the industry such as spending on intermediary goods such as equipment and instruments and induced effects are those that accrue to other industries and sectors as a result of activities within the FAM industry such as food providers, retail purchases, accommodation, etc.

Direct Contributions of FAM Industries to GDP

Approach to Estimating Direct Contributions to GDP

In this report the Consultants estimate direct contributions, indirect contributions, and induced contributions of FAM Industries to GDP. Direct contributions were estimated using the following approaches:

- For Film and Animation, it was based mainly on information collected from a sample of companies and freelancers. Data/information collected on typical budgets and the typical number of projects per year for practitioners was used to estimate income/expenditure. In doing this analysis for the Film Industry, the practitioners were segmented by companies and freelancers and different estimates developed for each.
- For the Music Industry, the **A-Z Census Approach** was used to estimate direct contributions. Industry practitioners and experts identified that live shows are the main source of income for practitioners. In this approach, extensive research was conducted by A-Z Information Jamaica Limited's consultants to do the following:
    1. Identify all known Jamaican income earning practitioners - male artistes, female artistes, gospel artistes, and band/groups
    2. Work with knowledgeable partners from the industry to classify practitioners into categories, based on their estimated earnings per live show based on pre-pandemic standards
    3. Work with knowledgeable partners from the industry to classify practitioners by the estimated number of live shows they would have been engaged in per year during pre-pandemic years
    4. Utilize the data from 2 and 3 above to estimate the aggregate total earnings from practitioners, which would provide an estimate of direct contributions to economic activity.

Indirect and Induced Contributions of FAM Industries to GDP

Ideally in executing this assignment, the Consultants would have preferred to utilize input-output models, multipliers and other factors provided by the Jamaican Authorities. Unfortunately, no current estimates are available for all of the above. The Consultants were therefore forced to rely on reasonable assumptions.

Indirect Contribution/Expenditure
In terms of estimating indirect expenditure, which are expenditures within the industry required to support the direct contributions or main productive activities of practitioners (such as equipment, tools, staff, et), the consultants would conservatively estimate that these would be 25-50% of the Direct Contributions.

Induced Expenditure
Induced expenditure are those expenditures that take place in all economic and social sectors as a result of the direct contributions/expenditures of practitioners. These include expenditures on food, healthcare, education, cosmetics, hairstyles/haircuts, telecommunications, etc. In these cases, the multiplier effects would be typically assumed to be between 1.5 to 2 times the direct expenditure. These multipliers were typically within the ranges used by Vanus James in the 2017 study.

Summary of Economic Impact of FAM Industries in Relation to GDP

The table below summarizes the overall direct contribution, indirect contribution, and induced expenditure of the Film, Animation and Music Industries to the Jamaican economy. It also compares them to GDP at Market prices for 2019. It can be seen that

- The Film industry is estimated to have an overall impact equal to **1.33% of GDP**
- The Animation industry is estimated to have an overall impact of **0.08% of GDP**
- The Music industry is estimated to have an overall impact equal to **4.68% of GDP**
- The overall impact of **FAM industries 6.18% of GDP.**

Table 1:Direct, Indirect and Induced Contributions made to GDP by FAM Industries.

Sources of Contribution	JMD	% GDP
Total Contribution of Film Industry	**28,045,623,342**	**1.33%**
Direct Contribution	9,348,541,114	
Indirect Contribution	4,674,270,557	
Induced Contribution	14,022,811,671	
Total Contribution of Animation Industry	**1,787,415,000**	**0.08%**
Direct Contribution	1,021,380,000	
Indirect Contribution	255,345,000	
Induced Contribution	510,690,000	
Total Contribution of the Music Industry	**98,670,053,000**	**4.68%**

Sources of Contribution	JMD	% GDP
Total Direct Contribution from Artistes[2]	26,908,375,000	
Total Indirect Contribution due to expenditure by Artistes	13,454,187,500	
Total Induced Contribution due to expenditure by Artistes	13,454,187,500	
Indirect Contribution from live shows by artistes	1,497,500,000	
Induced Contribution from Live shows by artistes	2,246,250,000	
Direct Contribution (earnings) of DJs and Sounds Systems	838,750,000	
Indirect Expenditure at Shows by DJs and Sound Systems	11,231,250,000	
Indirect Expenditure before Events by DJs and Sound System	11,231,250,000	
Induced Expenditure Due to DJs and Sound System Events	16,846,875,000	
Estimated Earnings to Jamaicans from JACAP, JAMMS, other CMOs	311,422,200	
Induced expenditure effects from Royalties collected	467,133,300	
Total Contribution of Film, Animation, and Music (FAM)	**128,503,091,342**	**6.18%**
GDP (at Market Prices 2019)	**2,110,433,000,000**	

Contribution to GDP of FAM Industries Compared to Other Economic Sectors

The table below shows the contribution to GDP of FAM Industries in comparison to other economic sectors.

Table 2b:Contributions made to GDP by FAM Industries Compared to other Economic Sectors.

Sector	2019 Million	% GDP	Compared to FAM
Film, Animation and Music	**128,503**	**6.18%**	
Agriculture Forestry & Fishing	148,144	7.0%	FAM Slightly below
Mining & Quarrying	37,734	1.8%	FAM well above
Manufacture	163,315	7.7%	FAM Slightly below
Electricity & Water Supply	61,185	2.9%	FAM well above
Construction	144,100	6.8%	FAM Slightly below
Wholesale & Retail Trade; Repairs; Installation of Machinery & Equipment	330,623	15.7%	FAM well below
Hotels & Restaurants	84,159	4.0%	FAM well above
Transport Storage & Communication	137,151	6.5%	FAM Slightly below
Finance & Insurance Services	189,821	9.0%	FAM well below
Real Estate Renting & Business Activities	187,065	8.9%	FAM well below
Producers of Government Services	220,728	10.5%	FAM well below
Other Services	112,721	5.3%	FAM slightly above
Less Financial Intermediation Services Indirectly Measured (FISIM)	102,234	4.8%	
TOTAL GROSS VALUE ADDED AT BASIC PRICES	1,714,513	81.2%	
Taxes Less Subsidies on Products	395,919	18.8%	
GROSS DOMESTIC PRODUCT AT MARKET PRICES	2,110,433	100.0%	

Source: Statistical Institute of Jamaica 2020

[2] Differences between Male Artistes, Female Artistes, Gospel Singers, and Bands/Groups are shown in Chapter 5

The above table shows the contribution of different economic sectors to Jamaican GDP. Given that the overall contribution of Film, Animation and Music to GDP is estimated to be 6.18%, it can be seen that FAM contributes more to GDP than:

- Mining and Quarrying which contributes 1.8%
- Electricity & Water Supply which contributes 2.9%
- Hotels & Restaurants which contributes 4.0%
- Other Services which contributes 5.3%

FAM contributes slightly less to GDP than

- Construction which contributes 6.8%
- Transport Storage & Communication 6.8%
- Agriculture Forestry & Fishing which contributes 7.0%
- Manufacture which contributes 7.7%.

The above analysis shows that FAM Industries contribute a significant amount to GDP and contribute more than several important sectors and close to several others. **Given that appropriate Government Policy and Strategies could significantly increase the contribution of FAM industries to the economy, Jamaica has great opportunities should it choose to exploit them.**

Value Chains in the Film, Animation and Music Industries

The survey results relating to the value chain show for the Film industry that the most active segment of the value chain by a long way, is Production followed by Pre-Production, Post-Production and Exhibition/Distribution and Marketing. The four common roles played by the respondents are Directors (Production), Producers (Pre-Production), Production Assistants (Pre-Production), Film Editors (Post-Production), Camera Crew (Production) and Screenwriters (Pre-Production).

The data showed that the respondents played an average of 8.8 roles in the Production segment compared to 3.8 roles and 3.1 roles in Pre-Production and Post-Production respectively. The data suggests that persons in the film industry are operating more as Generalists rather than Specialists.

The survey results relating to the value chain show that Animators are for the most part very cross-functional and multi-skilled and thus operate across the Pre-Production, Production and Post-Production segments of the value chain. In fact, from the information garnered from the Respondents, most of the work is conducted in the Production Segment, followed by the Pre-Production and Post-production segments. There is minimal activity in the Distribution/Marketing segment of the value chain. The information gleaned from this section of the survey will no doubt give an indication of some skills that are available in the animation sector. The three most popular roles are namely that of Illustrator (Pre-production); 2D Animator (Production) and Concept Artist (Pre-production) – see Chapter 4 section 4.9.2 for more details.

With respect to music, information on the value chain was obtained from the Census of the Industry that the A-Z Consultants have conducted as well as information obtained from the Survey. More data needs to be collected to understand the Music Value Network better, however from information gathered to date, the Live Music Sector and Production segment within the Recording Industry seem to be most active areas in the Network.

Export of Services by FAM Practitioners

The survey results show that FAM service providers export 32.4% of their services (nearly one third). This reflects the fact that FAM practitioners provide services online (Mode 1), provide services to tourists and foreign visitors to Jamaica (Mode 2), and travel or tour to provide services (Mode 4). They export to several markets including North America, UK/Europe, and the Caribbean – the North American market is the most significant. Some practitioners earn significantly more from exports to other markets than from local activities.

Imports by FAM Practitioners

From the survey results (see the Table 14), equipment is the main import item across the FAM Industries, followed by Software and Props/Set Items. More specifically the following was observed:

- Practitioners in the film sector said that they import mainly equipment (62%) and props/set items (29%). A relatively small number of respondents (14.5%) indicated that they import professional services with 9% saying that they import machinery.
- Practitioners in the animation sector indicated that they import mainly equipment (69%) and software (65%). Machinery and Talent each accounted for 17% of the identified items imported by the Animators.
- Respondents in the music sector said that they import mainly instruments (50%), equipment (41%) and software (27%).

IP Related Income

From the data collected it seems the majority of FAM practitioners do not access IP related income with 63% stating they received no income from copyright sources. 23% of those who receive IP related income, receive between 1 and 30% of their income from IP related sources. Table 17 provides more details.

Incentives and Support to FAM Industries

The survey results in this study show that FAM practitioners tend to have a relatively low "take-up" rate as it relates to Government incentives and support. This may be caused by the informal nature of many in the industry as well as the need for more creative communication strategies so that practitioners are aware of all the opportunities.

Survey respondents in each FAM Industry outlined the type of support that could assist them in being more productive and competitive.

For the Film Industry, this included:

- Import related initiatives such as duty free import of equipment and vehicle

- Tax related initiatives (including income tax) such as tax exemptions for shooting films and videos in Jamaica and Tax credits to help start-ups
- Initiatives to attract more productions to Jamaica such as providing larger scale promotion of Jamaica as a filming location and not just a tourist destination as well as concessions for filming locally.
- Investment/Grant related initiatives such as a Film Fund and additional Co-Production Treaties beyond that with the UK
- Advertising Related Initiatives such as the removal of taxes from advertising spend
- Technical support for TV and film producers

For the Animation Industry, the incentives/support required include:

- Tax rebates/incentives
- Custom duty exemptions/waivers on imported equipment
- Film Development Fund Launch
- Animated Film Fund
- Scholarships for animation
- Incentives for institutions to improve animation programmes
- Partner with PayPal so that practitioners can more easily access their money
- Production tax incentives for foreign productions.

For the Music Industry, practitioners identified the following incentives:

- Export market development for entertainment products
- Grants to assist with Covid-19 fallout.
- Better protection of the local musicians and industry
- A better Act than the Noise Abatement Act - a law is required that sees music as "business and not noise".
- An easier way to provide longer term work permits with some countries.
- An easier way to access tools of trade so it does not cost to bring the equipment.

Recommendations

1. Encourage local performances and Generate Multiplier Effects

- Government policies/incentives should be put in place to continue to encourage film related activities in Jamaica. Such local based activities generate significant indirect and induced benefits which have broader and deeper economic impact.
- Given the tight linkage between the film and animation industries, the animation industry would benefit from more local activity in the film industry
- The analysis in this study has shown that, other things being equal, local shows typically contribute much more to the Jamaican economy than when our artistes perform overseas. There is nothing wrong with our artistes going overseas to perform because that results in exporting of services (Mode 4); it builds their own image/brand as well as the image/brand of Jamaica. However, policies/incentives should be put in place to encourage more local performances because this will
    a) Increase exports (Mode 2) as tourists (including Diaspora) visit Jamaica to participate in such events
    b) Increase local consumption given that local residents will be able to participate
    c) Both a and b above generate multiplier effects that will pass through multiple economic sectors/industries such as retail, education, healthcare, beauty and personal care, recreation, agriculture, etc. These multiplier effects create a greater economic impacts than the initial activity.

In other words, a performance by Top Artiste A in Jamaica has a much greater economic impact on the Jamaican economy than a performance by Top Artiste A in another country.

2. Develop Reggae Parks and other Parish Facilities to Foster Local Performances[3]

The Government should either develop or encourage the private sector to set up Reggae Parks or Concert Centres in each Parish to provide an appropriate venue for performance. This could be done in conjunction with a Football, Cricket, or other sporting Club. This recommendation is in line with recommendation 1 above. The Government could also work with the industry and business community to

- Engage certain artistes who come from a particular area to Champion and/or sponsor a particular Reggae Park
- Organize regular events music events in the Reggae Park
- Provide opportunities for upcoming artistes to perform and develop their craft and competencies
- Provide training and development to upcoming artistes
- Provide other goods and services to support the Reggae Park e.g. food, drink, personal care services, locally made tourism items, etc.

These Reggae Parks would be very attractive to tourists who could travel to Jamaica and move from Parish to Parish and enjoy the different activities. This would stimulate developments in accommodation, community tourism, retail, etc.

[3] This concept was put forward by A-Z Information Jamaica Limited in 2006 in the Jamaica Services Sector Study carried out for JAMPRO.

3. Dialogue Between FAM Practitioners and Government to enhance trust

In the process of conducting this study, it was quite clear that there was a trust deficit between the Government and the FAM Practitioners. This lack of trust results in a lose-lose position due to the fact that:

- Practitioners try to conceal their activities for fear of being pursued by the tax and other authorities. This involves choosing to live, perform and invest their funds outside of Jamaica. These activities restrict the potential benefits to Jamaica from the activities of these practitioners and force artistes to live outside of their homeland.
- The multiplier effects of artistes engaging more with the local economy are lost to Jamaica. In fact these benefits actually accrue to the countries that our artiste choose to live, perform or invest in. While at the same time the Government loses from not having a larger economic base from which to earn revenues (or avoid having to give social safety net benefits, etc.)

A properly designed and executed civic dialogue initiative (used around the World and sponsored by Agencies such as UNDP) could be used to develop trust between the Government and the FAM Practitioners so that they understand better the perspectives and concerns of each other and recognize that all parties could benefit if they worked together to grow the industries rather than maintain the status quo which restricts development of the industries.

4. Foster and Reward Creativity and Do Not Tax Creativity

This study has shown the great level of economic activity that "creative industries" can produce. Given the natural endowments of creativity that Jamaica possesses, which resides in its people, this is probably Jamaica's greatest natural resource and should be fostered, encouraged, and rewarded to the fullest. It should be noted that DIRECT TAXES on any economic activity discourages such an activity therefore policymakers should declare **Jamaica a Tax Free Creativity Zone**. As a Tax Free Creativity Zone, this will

- Encourage more local creativity as local artistes who are successful do not feel the need to conceal their earnings by engaging in trade diversion activities, such as operating out of Jamaica or investing outside of Jamaica, in order to avoid direct taxes and other penalties. Furthermore, these local artistes are typically high spenders and conspicuous spenders so carefully designed indirect taxes would be more appropriate.
- Encourage more new artistes to enter the creative sector especially if grants and other incentives are put in place to identify, assist and reward those that enter the creative sector (e.g. Christopher Martin, Romain Virgo, etc.). These new entrants should be linked with Reggae Parks as well as the more successful artistes. Successful artistes operating in the **Jamaica Tax Free Creativity Zone** should be encouraged to foster development of new artistes as well as their Parish communities.
- Encourage foreign artistes and other creatives to come to Jamaica, which will provide opportunities for collaboration where beneficial as well as provide multiplier effects in terms of spending on accommodation, transportation and other local expenditure

- Help to stimulate more local performances because if the creative people have less reason to leave Jamaica, they will remain and perform locally. This will help to finance the Reggae Parks and strengthen the opportunities and multipliers outlined above in Recommendations 1 and 2.

Jamaica should promote itself as Tax Free Creative Zone in which the following obtains:

- People in the creative industries are not taxed
- New entrants are supported, incentivized, and rewarded

This will result in

- Earners from Creative Industries wishing to stay in Jamaica, keep their funds in Jamaica, raise their children in Jamaica (Vision 2030)
- Attract more "Creatives" from all over the world
- Stimulate more local performances from which significant multiplier effects will emerge
- Support the Reggae Parks and Parish Entertainment Centres
- Generate more indirect tax revenues
- Build Brand Jamaica.

5. Maintain current data on the FAM Industries

The Government should work with the FAM industries to build on this study and continue to collect industry data and information. From the difficulties experienced by the consultants in generating information for this study, it is quite clear that the data/information should be kept current rather than allowing it to become outdated and then another initiative has to be started from scratch to generate up to date information.

Current data/information will facilitate better policies and strategies for the FAM industries as well as facilitate the tracking of economic impact on a continuous basis.

Recommendation Next Steps

The recommended next steps in this project include the following:

- Preparation of a PowerPoint presentation of the report with sections for each of the FAM Industries for discussions with JAMPRO
- Convene validation sessions with key stakeholders in each industry in order to get their responses to key issues such as the estimation of the population size as well as practitioners who may have been left out of the surveys.
- Make adjustments to estimates in the Final Report if necessary
- Formulate an Agreement with JAMPRO to facilitate the continuous updating of information so that the value chain can be mapped and estimates of economic impact generated continuously, which will allow policy makers to better service the FAM industries.

1.0 PROJECT BACKGROUND

1.1 Project Context

In 2015, international trade in creative goods was valued at US$510.0 billion. China accounted for the bulk of the trade (US$169.0 billion), followed by the United States and France which contributed US$41.0 billion and US$34.0 billion, respectively. Of note, eight of the twenty main exporters of creative goods were developing economies.[4] Despite the continued expansion of the global market, and Jamaica's unique offerings, local exports of creative goods and services have been underleveraged and estimated export earnings from the creative and cultural industries remain under the US$100 million mark.[5]

Against this background, *The Consultancy for the Business Plan for the Creative Industries* was conducted March 2016[6]. The study exposed the extreme dearth of current data on the sector. In many cases, no baseline data was provided with which to measure impact of any recommendations implemented. The study further noted that although the global cultural and creative industries are a major growth sector, without accurate, consistently produced and continually updated data, the exact performance of the Jamaican Film, Animation, Music (FAM) industries or their capacity to grow remains uncertain.

This project has been commissioned by JAMPRO to conduct an economic impact study for Jamaica's Film, Animation, and Music Industries (FAM) in Jamaica. The objectives according to the ToR are to:

1. provide a comprehensive account of the practitioners in the FAM industries
2. quantify their contribution to those industries, and
3. quantify the economic impact of Jamaica's FAM industries

Data on the Film, Animation and Music (FAM) industries is lacking in Jamaica and there are currently no reliable figures to estimate the actual size of the market in terms of the labour force employed in this sector or even the amount of money that is generated by creative entrepreneurs or practitioners. In 1997, JAMPRO estimated that over 15,000 people were directly or indirectly employed by the Creative Sector. Other estimates have the music industry employing between 6,000 and 15,000 people. Discussions with The Statistical Institute of Jamaica (STATIN) revealed that there is no disaggregated data on the FAM Industries. In terms of GDP data, STATIN amalgamates any estimates they have for FAM into the category Recreational, Cultural & Sporting Activities; as a result, STATIN is not a possible source of data for this study.

To help formalize the sector, the Government of Jamaica has developed an Entertainment National Registry (physical application form) and National E-Registry of Entertainment and Creative Industry Practitioners. Registration legitimizes creative entrepreneurs, allowing

[4] United Nations Conference on Trade and Development (2018). International Trade in Creative Goods-2015. http://unctad.org/en/Pages/DITC/CreativeEconomy/Statistics-on-world-trade-in-creative-products.aspx

[5] UNCTAD (2012) estimates that Jamaica's export of Personal, cultural and recreation services were valued at US$54.0 million.

[6] Tom Fleming, Creative Consultancy

them to be deemed as Recognised Entertainment Producers, accessing benefits such as free movement of labour/movement of natural persons (mode 4 exports) under the CSME and EU EPA respectively and fiscal incentives under the Omnibus Incentive Scheme and Regional Customs Exemptions Regime (Tools for Trade).

However, many practitioners are still not registered and operate in the informal sector, making data collection on the size of the sector, range of activities and contributions to GDP by creative industries even more difficult and leaving the true value of the sector unknown. The Government of Jamaica however has recognised the importance of FAM Industries and the potential economic gains to the country from developing this sector as seen through the creation of incentives such as tax relief, exemption on import duties on equipment and easy access to visa/work permits to encourage foreign investment in the film industry.

Jamaica's National Cultural Policy (2003) highlights this sector's importance and potential for growth through private sector involvement, financial backing and ensuring that the correct mechanisms/ instruments are in place to facilitate growth. Jamaica's National Export Strategy, which "seeks to maximise the sector's direct contribution to economic and social development by focusing on market-driven interventions" highlights cross cutting areas including capacity building, export financing, market access/trade information, standards/quality management in promoting exports in priority sectors. Creative industries have linkages with other sectors, as seen in the promotion of 'Brand Jamaica' in the manufacturing industry/Agri-business industry. This is also illustrated by the sector's impact on the tourism industry with increased arrivals of foreigners coming to Jamaica to experience the rich cultural and creative aspects of the island.

Estimates[7] suggest that the creative industries account for 5.2% of GDP in Jamaica and 3% of employment, reflecting the potential contribution the Creative Sector can make to economic growth. Additionally, the Creative Sector is well known as an area of competitive advantage for the Caribbean, highlighting the importance of this project in ascertaining a clearer idea of the actual size of the Sector and the true economic impact that FAM industries have on Jamaica – including labour market indicators and the contribution to Jamaican exports via the 4 modes of supply of services.

1.2 Consultancy team

The experts responsible for carrying out the objectives of the assignment are:

Dr Noel Watson: Economist, Researcher and Lead Consultant.
Denise Leander-Watson: Research, Media and Communications Consultant
Miranda Allbrook: Research and Data Analysis

The consultancy was supported by A-Z Information Jamaica's backstopping team who assisted in the following areas:

[7] Source: 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. ECLAC, 2018 (Michael Hendrickson Sonjah Stanley Niaah)

Reva Watson:	Project Management
Phyllis Allbrook:	Quality Control and Research
Venesia Townsend:	Administrative Activities

The lead Consultant, Dr. Noel Watson is the CEO of A-Z Information Jamaica Limited (A-Z), which was registered in Jamaica in 1996. Over the years, A-Z has successfully worked with numerous local, regional and international organizations on projects ranging from basic research assignments for private companies to advising Governments on international trade agreements signed between countries across the world. Dr. Watson has a wealth of experience in research, international trade in goods and services, cost-benefit/economic evaluation and MSME business development. Dr. Watson's Ph.D. and subsequent work involved the use of various tools of economic evaluation.

1.3 Objectives of the Project as Outlined in the Terms of Reference

Overall objective

The overall objective of the project is to conduct an economic impact study for Jamaica's Film, Animation, and Music Industries (FAM) through research and analysis of data on the Jamaican Cultural and Creative Industries.

Specific objectives

JAMPRO has the following specific objectives for this project as outlined in the ToR:

- To provide a comprehensive account of the practitioners in the FAM industries,
- To quantify their contribution to those industries, and
- To quantify the economic impact of Jamaica's FAM industries.

The outcome of the study will guide the value chain development and the investment and export opportunities for promotion across the industries.

Expected Outputs

a. Complete a baseline study and economic impact assessment on the FAM industries to measure size, structure, economic contribution (including, *inter alia,* contribution to GDP, market size, labour market contributions);
b. Update existing maps of the local Film, Animation and Music Value Chains, identify, and where possible, align existing resources along the value chain;
c. Expand the existing registry/database of practitioners (national registry of entertainment and CCI practitioners to include individuals involved in Film, Animation and Music);

d. Provide a list of indices (and their benchmarks) for measuring film, animation, and music as an economic activity, including contribution to exports of services;
e. Review current indices to assess the appropriateness of these indices for measuring the size and economic contributions of Jamaica's FAM industries;
f. Identify appropriate, quantitative methodologies for measuring the economic contributions of Jamaica's FAM industries.

Scope of Work

a. Undertake an economic impact assessment on the film, animation and music industries to measure size, structure and economic contribution;

b. Quantify the current economic impact of Jamaica's FAM industries;

c. Identify and quantify exports within Jamaica's creative industries pursuant to the modes of supply under Article I:2 of the General Agreement of Trade in Services;

d. Update the value chain maps for film, animation and music industries based on study provided for review/ sign off;

e. Ascertain and review qualitative and quantitative work that has already been done in this area and incorporate previous outcomes that may still be relevant based on consultations;

f. Conduct primary and secondary research including meeting with key stakeholders to ascertain actions undertaken/planned, challenges/constraints and develop solutions for capturing and measuring economic contribution of FAM;

g. Consult with private sector stakeholders and practitioners to identify bottlenecks and challenges, and chart possible solutions;

h. Update an inventory/database of existing film, animation and resources along the value chain;

i. Collect and collate information regarding industry personnel with the aim of expanding the existing registry/database of practitioners;

j. Create a quantitative index which can be used to forecast industry development within the medium-term and long-term.

Table 3: Project Deliverables

I.	**Inception Report**	**This included an expanded methodology. schedule of work and related output.** **This was submitted electronically**
II.	**Stakeholder Consultations - Primary and Secondary Research**	Primary research was carried out using data collection instruments designed by the consultancy team. These were developed following consultations with key industry stakeholders to ascertain actions undertaken/planned, challenges/constraints and to develop solutions for capturing and measuring economic contribution of Film, Animation and Music. Data collection instruments were designed and were administered in various ways including telephone, Zoom focus groups and online using Google Forms or a similar platform. By using online questionnaires, it was felt that more key stakeholders could be reached, and more information gathered. Information from this phase was used to expand the existing database of practitioners. Where possible, participants were also encouraged to sign-up with the National E-Registry of Entertainment and told of the benefits of becoming Recognised Entertainment Practitioners.
I.	Draft Report (Electronic)	The first draft of the report contained the findings from the consultants' consultations, incorporated with findings from preliminary consultations into a comprehensive economic impact study. The report included: (a) results of the baseline information collection Estimates of Direct contribution of FAM Industries and (b) Value Chain information based on the samples This was delivered in electronic format to the Film, Animation and Music Sector Teams for review and provision of relevant comments and feedback for inclusion in the Final Report.
III.	Final Report and Draft PowerPoint Presentation	This report will be an enhancement of the Draft Report, incorporating feedback and comments from the review of the draft from relevant key stakeholders. A PowerPoint Presentation will also be prepared for discussions with stakeholders.

1.4 Challenges Experienced in Data Collection

The main approach to data collection in the FAM industries included:

1. A data collection instrument designed and administered to the Heads of Associations representing each industry.
2. Online questionnaires designed and administered to practitioners in each of the FAM industries.

With respect to data collection from the Associations, the A-Z research Team had no problems, the Heads of these Associations were responsive in terms of answering the questions administered to them. Even though they refused to provide the listing of their members, they agreed to distribute the online questionnaires to their membership.

With respect to data collection from practitioners, the main challenges included the following:

- Respondents were suspicious about some of the questions and were reluctant to complete the questionnaire
- Respondents were worried about being pursued by agents of the Government, especially the “taxman”, if their information was revealed, despite A-Z’s promise not to reveal their individual information
- A few Association heads as well as practitioners explained that even if they responded, they would not provide accurate information to certain questions in order to protect their information.
- Fatigue amongst practitioners who complained that numerous surveys were being (and have been) conducted on their industry by various authorities but nothing has been done to benefit the industry
- Some practitioners felt the wrong approach is being used to generate information required to estimate impact.

2.0 LITERATURE REVIEW

At the commencement of the project, JAMPRO shared several reports with the consultancy team who also identified other relevant studies. The following are brief synopses of these studies:

1. Animation Industry Report 2018 (World Bank Group Jamaica: January 31, 2018)

   Report on the Jamaican Animation Industry commissioned by the World Bank in 2018. This report aimed to:

   - Identify current progress as well as gaps in the animation industry
   - Recommend ways forward to achieve the remaining goals which are to produce 500 Animators and 20 studios with 15 – 25 Animators stationed at each within the next two (2) years[8]
   - Highlight the challenges facing the animation industry, including global outlook, information on training institutions and their animation related programmes, animation studios, policies that affect the industry, current projects related to animation and information on financial institutions that support MSMEs in animation.

2. Animation Practitioners Survey (Jamaica Animation Nation Network (JANN); January 24, 2019) - Report following survey of 40 practitioners in the Animation industry mainly included those who participated in different elements of the YEDAI (Youth Employment in the Digital and Animation Industries) Project

3. Update on Youth Employment in the Digital and Animation Industries Project (YEDAIP) 2019

   YEDAIP aims to support youth employment in digital and animation industries. The document provides an update on activities from the various active components of the project, including capacity building to enhance employability and entrepreneurship; Digital and Technological Skills Development for Youth; and Support to Science Technology and Innovation.

4. Creative Industries Business Plan for Jamaica (Tom Fleming Creative Consultants; 2017)

   Commissioned by the Planning Institute of Jamaica (PIOJ), this report outlines market opportunities for Jamaican Creative and Cultural Industries (CCIs) in terms of employment and contributing to the growth of the Jamaica economy; being a key sector for exports; and the value CCIs add to other sectors such as tourism and manufacturing, and in promoting 'Brand Jamaica'. The report includes sector analyses on priority sectors including Music and Film, Audio-visual, Interactive Media and Digital industries and also includes **a list of key industry stakeholders** consulted during the primary research phase of the project. The report also focuses on the value chains

[8] An update on the progress will be provided later in this report in the section that deals with Animation.

in each of these creative sectors and has a value chain map for Creative Media Content to include animation and digital sources of media.

5. Creative Industry Study (Heart Trust/NTA; 2013)

   This study was commissioned by HEART TRUST/NTA to provide an overview of the structure of the CCIs; regional and national labour market information; regional and national information on the training needs of the industry (especially as it relates to the Vision 2030 Creative Industry Plan); and to develop a training plan with a roadmap for implementation. The report includes a projection on the demand for skills as well as a subsector overview of priority sectors including Animation, Film and Music. The report also discusses the available supply of skills, including education and barriers to training and provides a training plan with identified priority areas for action to bridge skills shortages in the CCIs.

6. A Study on the "Creative Industry as a Pillar for Sustained Growth and Diversification – The Film and Music Sectors in Jamaica: Lessons from Case Studies of Successful Firms and Ventures". (Michael Hendrickson and Sonja Stanley Niaah for ECLAC; 2018)

   The report identifies critical success factors of activities within the film and music industries in Jamaica, evaluating historical and current trends, economic contributions, challenges and opportunities for further development. It also discusses the challenges and opportunities of the new digital landscape and technologies that have revolutionized CCIs, especially in the Music Industry. This study contains value chain maps for the Music and Film industries.

7. Screen Currency: Valuing Our Screen Industry (Screen Australia; 2016)

   This report is a study of the Australian film industry including comprehensive measurements of the economic and cultural value of the sector and their contributions to the Australian culture and society.

8. The Economic Impact of the UK Film Industry (Oxford Economics.; June 2010)

   This project was supported by the UK Film Council and others and provides a model to estimate the economic impact of the U.K. film industry. **Some of the approaches used in this UK study have been adopted for this project.**

9. The Economic Contribution of the Film and Television Sector in Canada (by Nordicity, July 2013)

   This study was conducted by Nordicity and commissioned by the Motion Pictures Association – Canada, in collaboration with the Canadian Media Production Association. The study assesses the impact of the entire industry's value chain on the Canadian economy, including direct, indirect and induced impacts on other sectors. The report also examines spill-over economic effects, including film festivals, tourism, construction, etc. The study notes that other industries, such as computer animation and VFX studios have emerged as critical elements in the new wave of production capabilities in Canada. **The Nordicity approach was also used in this project and, in**

addition Nordicity provided some technical support in terms of discussing the methodology.

10. Economic Analysis of the Audio-Visual Sector in the Republic of Ireland (Olsberg SBI; December 2017)

    The Report on the impact of the Audio-visual sector in Ireland covers the current state of the sector, the economic impact, the fiscal impact, the strengths and capabilities of the Irish Audio-visual sector, key strategic issues related to the sector, and policy recommendations including selective financing, skills development, regulatory reform, marketing and other support and reforms. It also discusses how the market works and how this impacts the producer and the Audio-visual sector in Denmark, Finland, The Netherlands and The UK & Scotland. **Ideas were sought from this study especially in terms of multiplier and indirect effects.**

11. Economic and Social Impacts of the Florida Film and Entertainment Industry Financial Incentive Program (prepared by MNP, March 2013)

    This is a preliminary report prepared for the Motion Picture Association of America. It examines the economic impact of the film and entertainment industry identifying areas such as production spending; infrastructure spending; creation of opportunities for trainees/interns; film-induced tourism; and community and social benefits.

12. New Zealand Institute of Economic Research: The Economic Contribution of the Screen Industry (November 2017)

    The report outlined the economic contribution of the New Zealand screen industry ecosystem, exploring impacts on the economy, impact on skills and employment and the impact on 'NZ Inc', which is a business intelligence firm, providing strategic insights into key domestic and international issues that affect business in New Zealand.

13. Economic Impact of the South African Film Industry Report (Urban-Econ Development Economists; 2017)

    The project was commissioned by the National Film and Video Foundation (NFVF) to assess the economic contribution of the South African film industry and provided a business case for more public and private investment in the industry by demonstrating the capacity of creative industries to stimulate economic growth and support the 2030 National Development Agenda

14. JAMPRO Investments 2018 (Film, Animation and Music ESSJ Submission 2018)

    2018 report on investments in the Jamaican Creative Industries, especially the Film Industry.

15. JAMPRO Investments 2017 (Film, Animation and Music ESSJ Submission 2017)

2017 report on investments in the Jamaican Creative Industries, especially the Film Industry.

16. Jamaica's National Export Strategy (NES) 2015-2019

    The NES defines the priority sectors for export development, one of 5 being Film and Animation, and the 6 related crosscutting areas, namely Export Financing, Logistics and Trade Facilitation, Market Access and Trade Information, Standards and Quality Management including packaging and labelling) and capacity building. It also discusses the 10 key success factors (as decided by stakeholders) required for the NES to deliver results including a market-driven approach, foreign trade policy and market access, A strong country brand, sustainability, an integrated approach to implementation, strong stakeholder involvement, excellent institutional support, a distribution-oriented focus, women and the youth and measurable results (a results-oriented approach). The key methodology for this strategy was visioning – a vision for export development in Jamaica across the priority sectors and crosscutting areas.

17. Culture in the CARIFORUM-European Union Economic Partnership Agreement: Rebalancing trade flows between Europe and the Caribbean? (Mira Burri and Keith Nurse, 2019)

    This study commissioned by UNESCO to examine the Economic Partnership Agreement (EPA) which seeks to improve market access for CARIFORUM goods and (some) services into the EU markets. The study also discusses the 2005 Convention objectives as implemented through the Protocol on Cultural Cooperation (PCC) and analyses the first five (5) years since its implementation (2008-2013). The main aim of the study is to raise awareness of the 2005 Convention to improve the trade framework of developing countries; inform policy action on the UN 2030 Sustainable Development Agenda, and to show ways that opportunities arising from the provisions of the CARIFORUM-EU EPA can be more fully exploited.

    Culture was not included within the scope of the analysis for this study.

18. The Economic Contribution of Copyright-Based Industries in Jamaica The Economic Contribution of Copyright-Based Industries in Jamaica (Vanus James; Mona School of Business, UWI August 28, 2007)

    Report commissioned to quantify the contribution of the copyright-based industries to GDP, employment, and foreign earnings in Jamaica. The study also aimed to update the indicators and framework for policy design, implementation, monitoring and evaluation, ensuring copyright-based industries are recognized for their contribution to the structure and growth performance of the Jamaican economy. The report ranks industries using productivity indicators, the most important of these for Jamaica being the average productivity of the claims paid for capital, which also provides a proxy for the productivity of imports. The report presents a policy framework from the analysis and mainly focuses on the economic aspects of the copyright industry.

19. Vision 2030: Jamaica's National Development Plan

Vision 2030 Jamaica is the strategic road map being used to guide the country towards the 2030 sustainable Development Goals, which is in line with the development paradigm of the United Nations.

The comprehensive vision of the national development plan is to make Jamaica the place of choice to live, work, raise families and do business.

Under this there is a strategy for CCIs – 'The Creative Industries: Our Vision- Under Vision 2030 Jamaica' in which the aim will be to increase the contribution of the creative industries to the Jamaican economy, using its competitive advantage to advance Brand Jamaica to the world. This will be done through building linkages among companies and individuals within the industry; strengthening education and training for creative industries; increasing opportunities and financing for the creative industries; encouraging more creative enterprises to be part of the formal market; encouraging the use of technology to produce, distribute and market creative products and services; expanding and improving the infrastructure (such as venues) for the creative industries and performing arts.

2.1 Methodologies used in International Studies

International Methodologies used in similar studies were used in this study. Specifically, elements of the methodology used in the report by Oxford Economics, "The Economic Contribution of the UK Film Industry", September 2005 and July 2007) were adopted in this consultancy. The following outlines the methodology used:

- Definition of sector: Consultants used the most commonly-used definition – which disaggregated the UK Film industry into Production, Distribution and Exhibition.
- Discusses tax relief and what qualifies as a British film. The report looks at measuring the contribution to GDP facilitated by film tax relief. Looks at how this would affect the UK's competitiveness if this was not in place.
- The report examines the channels of economic impact and identifies them as:
    - Direct Impacts: which cover employment and activity in the core film industry;
    - Indirect impacts: which include employment and activity along the supply chain due to companies in the film industry making purchases; and
    - Induced impacts: which looks at employment and economic activity that are supported by consumption spending by those directly or indirectly employed in the UK film industry.
    - Spillovers are also counted (additional economic catalytic impacts) including Skills and Labour Supply; Tourism; Culture; Merchandising; and Promotion and Trade.
- Measuring Direct Employment: The consultants used a survey conducted in 2002 which provided detailed survey of 400 companies- updated for growth in employment in the industry over the previous seven (7) years (using results of the Annual Business

Enquiry and Labour Force Survey). It estimated Full Time Employment (FTE) (based on the assumption that one part-time job=half of a full-time job) in the 3 sectors – Production, Distribution and Exhibition.

- Direct Contribution to GDP: used the standard method which is to measure the industry's 'value-added' which is the difference between the industry's pre-tax revenue and total bought-in costs.
- Direct Investment in the three (3) sectors of the film industry was also examined
- R&D expenditure (new products, processes and technologies) and impact on competitive advantage was also addressed
- Direct Tax Revenues: looked at contribution to the Exchequer (Income tax, NI employer and employee contributions, Value Added Tax, Corporation Tax and Withholding tax) and fiscal support for the core UK film industry i.e. government funding, funding from public sector organisations and EU funding. This may not be as meaningful in Jamaica given that much of the expenditure in the FAM industries is informal
- Direct Regional Impacts – looked at the contribution e.g. to employment - in areas outside of London.
- Economic Impact from non-UK firms: focused on the contribution, i.e. direct employment in the film industry supported by the distribution and exhibition of foreign made films (sectors other than production)
- Multiplier analysis – used an estimated multiplier of 2.0, meaning that for every 10 jobs supported by the core film industry in the UK, there are another 10 indirectly supported in the supply chain. The report discusses the indirect and induced multiplier impacts.
- Other areas that are covered and used to assess the overall economic contribution and impact of the UK film industries to GDP included:
  - the impact of the UK Film Industry on tourism
  - the impact of the UK Film Industry on the enhancement and appreciation of UK culture
  - The value of associated merchandising
  - How the UK Film industry promotes the UK and trade
  - The growth of Video-on-Demand and the threat of copyright infringement; and
  - The stimulus provided by Film Tax Relief

A-Z also looked at the Intellectual Property Approach used by WIPO and which was applied to Jamaica in a study conducted by Vanus James in 2007, however it was decided in discussions with JAMPRO, that the approach used by Nordicity would be adapted for this assignment because it was more in line with the objectives of this study.

3.0 INSTITUTIONAL INVOLVEMENT AND FEEDBACK ON FAM INDUSTRIES

Using a specially designed data collection instrument, the Consultants conducted interviews with representatives from the following 10 associations/organisations that work with FAM Industries: JANN, JAFTA, JAWS, AAJ, WIFTA, JARIA, JAMMS, Music Unites, JACAP and JFMAU.

The interviews were conducted over the phone and via online meeting platforms (Zoom, WhatsApp and Skype). The following is a summary of the findings from interviews with Associations.

3.1 Summary of Interviews with Associations Representing Film, Animation and Music

Associations/Organisations have been in operation for different periods of time e.g., AAA for 58 years, JFMAU for three (3) years though founded on legacy from 1959.

- They are all set up to help their members for advocacy purposes, promotion, creation of support networks, encouraging collaboration, outreach, source of information etc.
- Membership criteria must be met such as practicing professional; creator of works; residential status; interested in the industry.
- Apart from JACAP with 11 employees and JAMMS with nine (9), the associations/ organisations in general have no employees.
- The size of membership varies from JACAP with 4710, JAMMS with over 1000 Local Producers plus thousands of international rightsholders, and JARIA with 1200 Regular and Life Members to JAFTA with 300, JFMAU with 180 to Advertising Agencies Association of Jamaica with 16.
- Though most have members from all parishes, most members are from Kingston and St Andrew and to a lesser extent from St Catherine.
- Many do not charge membership fees but some charge as much as $25000, $4000, $2500 and some different types of fees such as General - $8000 Corporate - $20000; Student $4000; and Associated $6000.
- The Value Chain contribution is broad and wide but include Creators to the PRO to the Users and then Users back to PRO and then to the Creators, Production services.
- Where government policies are concerned some felt it impacted negatively, such as
    - unfair competition from Cubans and other imports; when performance venues have to end at 2 a.m. because of the Noise Abatement Act, which is when things are 'hotting' up; policies fragmented; copyright legislations need strengthening
    - government policies favoured foreigners and Work Permit legislation needed to be tightened up. There needs to be more observance by Government with respect to Entertainment in the Tourism Industry which impacts negatively.
- COVID-19 has had a devastating effect especially with regards to shows and live performances.
- Many issues were stated, some infrastructural such as reliable internet. Others included: lack of access to finance; fragmentation of the sector; absence of policy; IP not accepted as collateral and lack of job opportunities.

More details are provided in table 3 below.

Table 4:Association – Purpose & Membership Information

Name of Association	Purpose and membership criteria	Number of Association employees	Size and composition of membership	Membership Fees (Annual)
Advertising Agencies Association of Jamaica - **President – Arnold Foote jnr.** **58 years in operation**	**Purpose** • to support the individual member agencies in their business relations with the media and monitor the activities of members of the AAAJ. **Criteria** • Members must be a bona fide advertising agency with a certain number of staff and volume of business.	0	16 • corporate category, mainly firms. • located mainly in the Kingston and St. Andrew area • Big players e.g., Advertising and Marketing Jamaica Limited • Medium e.g., Prism • Small e.g., PRO Comm	$25,000.
Jamaica association of Composers, Authors and Publishers Ltd (JACAP)- LYDIA ROSE, General Manager **In operation since 1999**	**Purpose:** • It is a Performing Rights Organisation (PRO); It's mandate is to act as a collecting agency of royalty for artist **Criteria:** • Must be a creator of musical works- author or publisher	11	4710 • Mainly Freelancers • In all parishes- most in Kingston, St Andrew and St Catherine • Falls in all three categories • Publishers would be dominant and are companies • **Small** ones are individuals and majority of members • Have international members - we have reciprocal arrangements with societies within each country; we collect royalties for them and they do same for us	An amount of J$2500 for writers and J$1270 for publisher (a one-time fee)
Jamaica Music Society (JAMMS)- Evon Mullings- General Manager **In operation 13 years**	**Purpose:** • Administer Neighbouring Rights of Record Producers and Performers. **Criteria** • A Producer must have a minimum of 3 sound	9	Over 1000 Local Producers + Thousands of international rightsholders by way of bilateral agreements with equivalent international Societies. • Mainly freelancers	0

Name of Association	Purpose and membership criteria	Number of Association employees	Size and composition of membership	Membership Fees (Annual)
	recordings, to which he owns master rights, and which must have been commercially released. • A Performer only needs to have performed on at least one sound recording which has been commercially released.		• 95% based in Kingston and St. Andrew. • Size- mainly Micro	
Music Unites Jamaica Foundation – Rosina Moder **Operating since 2009**	**Purpose:** • Education, research, preservation of music outside the genre of folk and popular music **Criteria:** • They are an NGO not an association	0		
Jamaica Federation of Musicians and Affiliates Union (JFMAU)- President Karen Smith **The JFMAU is Three (3) Years old founded on** **the legacy from 1958.**	**Purpose:** • Trade Union for Musicians, Creatives and related Affiliates in Entertainment **Criteria:** • Musicians, Dancers, Creatives, Entertainment Affiliated Services • Is a Jamaican or the holder of a valid Jamaican work permit • Is not a member of any other Jamaican music or entertainment Union • Non-resident of Jamaica visiting short term to provide services in music or entertainment	0	180 • Freelancers • Randomly Distributed across Jamaica • Small and micro; business and firms not accepted presently ○ Large players e.g. Hah-r-Mony Entertainment, ○ **Medium e.g.** Jackie Jackson Entertainment ○ Small **e.g**. Woopydoo Entertainment	10,000 Annually. However, the Executive has approved a reduction in 2020 to mitigate against the effects of Covid19. Currently, Membership Fees are $1,000, however the normally included Life Insurance benefit is currently Suspended.

Name of Association	Purpose and membership criteria	Number of Association employees	Size and composition of membership	Membership Fees (Annual)
The Jamaica Reggae Industry Association – Mr. Ewan Simpson (President) in operation since 2009.	**Purpose** It serves as an umbrella association for lobbying and general industry development. • Lobbying the Government on behalf of its members including tools of trade (reduction in duties) • Making recommendations for Work Permits for persons to go abroad and wo • Training & development **Criteria** • demonstrate an interest or participation in the Jamaican entertainment industry. There are Affiliate members and organisations can become members.	0	1200 Regular and Life Members • mainly Individuals. • majority from Kingston and St Andrew, Clarendon, St. Catherine and St. James. • Also small number of foreign members including Diaspora • **Dominant Players in the Industry** e.g. Sean Paul, Vybz Kartel, • **Large Players** e.g. Sean Paul, Popcaan, Shaggy, Buju Banton, Morgan Heritage, Toots Hibbert • **Medium-sized players** e.g. Third World, Yellow Man, Agent SASCO, Spice • **Small and Micro sized players** e.g. Richie Stephens, Suga, Lila Ike, Koffee	$2,500 – individual membership
The Jamaica Writers Society (JAWS) President is Tanya Baston Savage. since 2013/2014.	**Purpose** • To lobby for the industry development for writers in Jamaica. It should be noted that JAWS is in a form of hiatus at the moment. **Criteria** • Has to be a professional writer • Has to have a published work in print or work that has been performed publicly		• Its membership is drawn from different genres such as Journalism, Theatre and • Film, with a focus on fiction and poetry. • Members mainly from Kingston and St. Andrew Kingston St Andrew and few foreigners	$4000.

Name of Association	Purpose and membership criteria	Number of Association employees	Size and composition of membership	Membership Fees (Annual)
Jamaica Film and Television Association (JAFTA) – Adrian Lopez (Asst President) and Analisa Chapman (President) Since August, 2015.	This is a government-endorsed not-for-profit association local film and TV practitioners **Purpose** • Enables members of the Jamaican audio-visual sector to strengthen collaboration within that sector. • It also facilitates and supports cultural exchange, capacity building and developmental initiatives, skills-sharing and community outreach.	1 part-time	300+ 5 types of membership: • **General. Corporate; Student; Associate; Honorary** • Members are mainly Freelancers/Independent Practitioners. • Members are from all over Jamaica but mainly Kingston and St Andrew, Mandeville and St. James. • Size of members • Medium e.g. Phase 3 • Small e.g. Liquid Light Digital	• General - $8000 • Corporate - $20,000 • Student $4000 • Associate - $6000
Jamaica Animation Nation Network – Mr. Kevin Jackson (Outgoing President) Since 2014.	**Purpose** • Create a network for Animators – develop the members who are practitioners • Conduction training workshops which are animation specific • Conduct competitions • Support educational institutions in the provision of solid curricula • Look for job opportunities for its members • Advocate to Govt Agencies on its members' behalf **Criteria** • An Animation Student or an Animation Practitioner		35 members approximately and a contact list of 300 persons Members living in Jamaica as well as Jamaicans in the Diaspora. • Freelancers are main members • It is a professional organisation and has been set up to offer the services for its members: **Medium**-sized players – Reel Rock GSW, Liquid Light Digital, The Lab **Small and Micro** sized players – Night Vision Media Ltd., Listen Mi Caribbean, ESIROM	No fee

Name of Association	Purpose and membership criteria	Number of Association employees	Size and composition of membership	Membership Fees (Annual)
	• A submitted portfolio. • A 15-point system which has to be attained each year and one could earn through • participation in activities, such as workshop, webinars and volunteering			
Women in Film and Television Association (WIFTA) – Deborah Hickling Gordon and Kenia Mattis **Active for 8 years**	**Purpose** • Advocacy • Promote their business • Global networking • Primary mission is to connect empower and boost the visibility of the members- on • connecting; try to put members in touch with the needs that they have • Through empowerment provide information to allow member to improve their business • Boost the visibility of the members through highlighting successes and connections to local • and international members • Criteria • a working Professional in the Screen Industry. • men are allowed to be members	0	70 mainly professionals and freelancers; some international ones majority in the Kingston and St Andrew area.	No fees

Table 5: Associations – Value Chain, Earnings, Govt Policies, Impact of COVID 19

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
Advertising Agencies Association of Jamaica - **President – Arnold Foote jnr. 58 years in operation**	• Brand development - Writers, Planners, Strategists • Creative Management (Designer, Writers) • Pre-production, Production and Post-production	The head of this Association believes there should be no taxation on anything for advertising, communication or film because advertising promotes economic growth as well as promotes trade.	The COVID-19 pandemic has caused businesses to cut back on budget spend, which in turn has affected business/ earnings for the membership		
Jamaica association of Composers, Authors and Publishers Ltd (JACAP)- LYDIA ROSE, General Manager In operation since 1999	Creators to the Pro to the Users and then Users back to PRO and then to the creators	• Copyright Act is good for our industry. • There are no legislations but would like to have some Mandating users of copyrighted material to apply for licence before usage	Devastatingly- entertainment locked down in totality. They can't earn so nothing to pay; no gatherings held.	Distribution for products; they get air play nationally and internationally but not in the mainstream	On PIOJ website
Jamaica Music Society (JAMMS)- Evon Mullings- General Manager In operation 13 years	Production and service	• Noise abatement- by the nature of the business, much of it needs to happen at night • Not much policy to support the industry; adverse effect of policies such • Kingston became a formal music city some years ago but nothing meaningful has emanated, no actions to build on it	Loss of business engagements	• Not having resources to market work like international counterpart; have to use channels not needing large amount of cash hence reach is restricted; • Documentation of their business activity eg. Accounting records	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
		• Legislation requiring 2 a.m. lock off time negatively impacts members • legislation needed: that requires all event organizers/promoters to obtain their copyright and related rights permits at least 10 days prior to staging of event, in line with similar practice under the Noise Abatement Act as enforced by the Police when applications are being made to them.		• Not formally registered (can be a positive) but limit access to loans etc • Not having enough venues within Jamaica, itself • Release of music used to be a challenge, but Technology helps the release of music so that's no longer a challenge • Not having a local owned distributing platform reduces amount of revenue retained	
Music Unites Jamaica Foundation – Rosina Moder Operating since 2009				• Terribly slow recognition of its importance by the government and the wider public in general • receiving any funding is now even more difficult • in the year 2003, we put forward a proposal in order to establish the 'Clyde Hoyte Music Archive', which would have been	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
				the start of our music research centre, but it was rejected • MUJF has been lobbying for a suitable home for more than 10 years! This building shall ideally serve as Research Centre with space for exhibitions without success	
Jamaica Federation of Musicians and Affiliates Union (JFMAU)- President Karen Smith **The JFMAU is Three (3) Years old founded on the legacy from 1958.**	50 Vocalists/Singers 70 Band Musicians 10 Technical Engineers (light & sound) 20 Dance Performers 30 Circus Acts	• In additional general Labour Law Policies, our members are greatly affected by Policies effected by the Ministry of Tourism. • Work Permit legislation. Lack of observance by Government with respect to Entertainment in the Tourism Industry impact negatively • We need Policies that encourage greater export of Jamaica's Creative Goods (Music and Entertainment) • needs policy support and industry	Live Performances were cancelled as a result of Social Distancing rules. Most (almost all) members stopped earning in March 2020 as a result of Covid-19 and its effects.	Performance Fees needs revision Unfair competition from Cubans and other foreign imports Vacation Leave Health and Wellness Coverage	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
		protection to encourage further development and innovation			
The Jamaica Reggae Industry Association – Mr. Ewan Simpson (President) **In operation since 2009.**	➢ ***Pre-Production*** • *writing,* • *arranging,* • *studio work,* • *rehearsals,* • *show design,* • *costume design* ➢ ***Production*** • *studio recording* • *live performances* ➢ ***Post- Production*** • *Packaging of the performances* • *Mastering,* • *Editing* • *Mixing* ➢ ***Distribution and Marketing***	• Tools of Trade Policy - is it properly affecting the members? How are entertainers treated in terms of remitting funds when they tour? Do they get tax break and relief and waivers like the persons in the tourism industry? There is a challenge with the Noise Abatement Act – affects members adversely They would like amendment to act: • The Insurance Act (does not consider the seasonal nature and the cash flow issues etc) • The Noise Abatement Act	• Most members would have seen a significant decline in income • Public events and travel have been banned for the most part	• Accessing investment funding • Financial service support • Lack of a solid policy framework to support the structure and organisation of the industry • Lack of appropriate venue for the presentation of their work; no state-of-the-art performance centre	
The Jamaica Writers Society (JAWS) President is Tanya Baston Savage. • **since 2013/2014.**	• Writers feed in the Pre-production value chain for Music, Film and TV, since writing in this context is not an end in itself. • Publishing value chain: • Writer, Illustrator sometimes, Editor (main editor, copy editor and proof-reader),	The relevant legislation is copyright legislation – would like to see the number of years extended from 50 – 75. More government focus needed as for tourism		• One of the main challenges is a misunderstanding of the value of the writer. • Not enough has been put in the development of the craft of	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
	• Designer, Printer • Marketer			writing. UWI is only • just introducing a Bachelor's degree in publishing and creative writing. • It is almost impossible for writers do make a living from writing. There is the • need for grants and awards to give a writer space to write. • There is a perception of low value, hence the critical support is not forthcoming	
Jamaica Film and Television Association (JAFTA) – Adrian Lopez (Asst President) and Analisa Chapman (President) Since August, 2015.	**Pre- Production Phase:** • Producer • Screen Writer/Script Writer • Art Director • Talent Scout • Location Scout • Voice over Artist • Narrator **Production Phase:** • Production Manager • Equipment Rental • Transportation • Payroll • Accounting Firm	• There were incentives targeted at overseas productions coming in. It was discontinued but they are looking to re-start it. • Trying to get a policy as per Columbia, where a mandatory number of local films have to be shown in the country • Need more structure in terms of rates etc best	• Work has completely dried up for most • Live production events are not taking place • Members work mainly in advertising and a lot of that has been curtailed by	• Lack of dedicated developmental opportunities and infrastructure • Lack of funding • Distribution of the finished product • There is no dedicated film school • Film is more of a sector and not an industry - one cannot sustain	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
	• Camera Operators • Lighting persons • Cinematographers • Directors • Caterers • Talent • Hotel/Hospitality **Post-Production Phase:** • Editors • Special Effect Artists • Animators • Sound/Music Editors	practises for pay guidelines. • Legislation: Need for the legislation similar to the Columbia Model. Incentives for local film makers • trying to get local content. • More co-production treaties in place (maybe with other Commonwealth countries in the first instance)	Advertising Agencies in Jamaica • Some persons had to move from live action to animation as a work around for the COVID-19 restrictions. • Devastating for practitioners, persons have been depressed • Doing skeleton shoots based on the # of person restrictions and using family members as talent	oneself economically in the sector	
Jamaica Animation Nation Network – Mr. Kevin Jackson (Outgoing President) • **Since 2014.**	• Outsourcing and • Development of original content ○ ***Preproduction:*** ▪ Script Writer – Preproduction ▪ Writers - ▪ Voice Actors ▪ Artists/illustrators	A Government Tools of Trade policy would be very welcome, since the equipment is very expensive. With respect to legislations, they would like to see the following introduced: ○ Would like to see co-production treaties with	• Some members have seen a boost – increase in animation because there is a	• Lack of job opportunities • Jobs are not heavily advertised • Need for practical experience and more advanced techniques	Average Income/Earnings in the Industry include: • Animators - J$40,000/month • Snr Animators - J$60,000/month

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
	▪ Character Designer ▪ Story Boarding ▪ Rigger – creates the controls for the character) and Production ▪ Environment Designer ▪ 3D Modelers ▪ Set Designing ○ ***Production*** ▪ Studio Engineer Throughout ▪ Lighting – Production ▪ Visual Effects – Production ▪ Animator (makes the characters move) ▪ Layout ▪ key animation (Key Framer) ▪ In-betweening ○ ***Post-Production*** ▪ Video Editor – Post-Production ▪ Compositor ○ ***Marketing and Distribution*** ▪ Flyers ▪ Merchandise ▪ Press Releases ▪ the big screen or in a few theatres ▪ Release Windows ▪ Exclusive Distributions	other Caribbean countries and also Canada and Europe (impacts on double taxation) ○ Legislation which would encourage international studios to set up in Jamaica so that they could be exposed to world class operations ○ Setting up of an incubator ○ Good to have a Market Attendance fund – go overseas with to promote and sell your projects (trailers, completed film etc)	decrease in film • Suffering in terms of lack of band width, since they now have to compete with school children who are now doing school from home using virtual platforms	• Lack of equipment and spaces • Access to good internet – difficult to work remotely as high-power internet is needed to transfer files • Lack of access to advanced skill training • Access to software like adobe suite of products • Persons want to start studios, but they cannot access loans which accommodate creative persons – the financial institutions do not take IP as collateral	• One-minute animation can cost anywhere between J$30,000 and J$500,000 • 1-minute 2D animated commercial J$100,000 - J$300,000 (24 frames make • up one sec of animation – 24 pics per second)
Women in Film and Television Association (WIFTA) – Deborah	There are various models for the value based for the screen-based industries. IP creation, for example happens before Pre-production. Financing could be a	There are fragmented Government Policies with 6 ministries which have some impact on the Film	• New jobs slow in coming and there would	• Financing Policy • Distribution • Absence of Policy	

Name of Association	Value Chain and Earnings	Government Policies	Impact of Covid	Issues voiced	Income and employment data
Hickling Gordon and Kenia Mattis Active for 8 years	part, depending on the project. The links in the chain are modular. Members of the Association earn income primarily through recurring commercials and to a lesser extent TV and Hollywood.	and Television Industry and the policies listed below have not come together in a cohesive way to take in account the value chain and to form a wholistic screen-based policy i. IP Policy ii. Animation Policy iii. Culture and creative industry policy iv. Broadcast and broadband v. Internet vi. Small and Medium sized businesses Financial legislation by the way of incentives needs to be re-examined on the film side of the industry. There is no incentive for local productions. They are worth revisiting at this time. Broad cast legislation needs to be reviewed for fair trade - this will take some time to deal with. This legislation favours larger organisations.	have been cancellations • Very little work could take place based on restrictions put in place On the other hand, there was some amount of creativity which saw new ideas and products and news ways of doing things. It should be noted that screen-based industries play a major role in terms of entertainment and information sharing and a lot of these things have been shut down. There may have been some growth in output but not revenues.	• Absence of a Plan • Fragmentation of the Sector • Absence of cohesion • Issue of convergence of operations • Trade Policy • Research	

4.0 FINDINGS FROM SURVEY OF JAMAICA'S FILM, ANIMATION AND MUSIC INDUSTRIES

4.1 Summary of Data Collection Process

Specially designed online data collection instruments were prepared (using Google Docs) to collect data from practitioners in each of the three industries.[9] They were dispatched to practitioners on behalf of the Consultants by the respective Industry Associations, which were unable to share their membership lists due to confidentiality reasons.

The Consultants were also able to dispatch data collection instruments to practitioners that they personally knew as well as those found on JAMPRO's lists or those referenced in previous reports. JAMPRO also advertised the survey and made the links available on its website and its social media platforms. The Jamaica Animation National Network hosted an Instagram Live Event with a representative from A-Z Information Jamaica Limited, where the President went through the process of completing one of the questionnaires and posted the link in the chat window for local Animators present to complete the questionnaire. It can therefore be seen that several modes were used to distribute the online survey between September 1, 2020 to mid-March 2021. At the end of the process, 100 responses were received across the three sectors, as shown in the table below.

Table 6: Number of Responses

Industry	No. Responses
Film	55
Animation	23
Music	22
Total	**100**

Given that the data collection instruments were distributed to several hundred potential respondents by their respective associations, it was expected that a greater response rate would have been achieved, especially in the cases of Animation and Music.

Factors Explaining the Lower-than-Expected Response Rate

With respect to the lower-than-expected response rate, the Consultants found the following:

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[9] The links for the three (3) Data Collection Instruments are as follows:

Film:	https://forms.gle/SCToS6TF5GHyuppc7
Animation:	https://forms.gle/44zoEZXq4yTi8LAd6
Music:	https://forms.gle/ruwPRb4y7geBc8mj7

- There is a high level of suspicion and mistrust amongst music and animation practitioners who felt the information was being collected in order that they can be targeted by the Government for taxation, etc.
- There was also a high level of apathy due to the fact that it is felt in some quarters that persons have participated in surveys before, but no positive results have flowed to the industry.
- There is also some element of "survey fatigue" to which the Practitioners in the Animation Industry alluded.
- The fact that the Consultants did not have access to the contact information of most practitioners meant that they could not follow-up by phone, which is the technique typically used by A-Z's researchers to generate high response rates in surveys.
- Potential Respondents could not see a direct benefit to them and hence did not make the completion of the survey a priority.

As mentioned above, the Consultants worked with the various associations in each of the industries to distribute the questionnaires amongst their members. This included the Jamaica Film and Television Association (JAFTA) and Women in Film and Television Jamaica (WIFTJA) for Film; the Jamaica Animation Nation Network (JANN) for Animation and Jamaica Reggae Industry Association (JARIA) for Music. A-Z researchers also made contact with practitioners who happen to be in the A-Z network, which also generated some responses. However, many of these contacts admitted that they were not prepared to complete the data collection instrument. It should be noted that the Associations were quite helpful. The outgoing President of JANN, Mr Kevin Jackson, has been extremely helpful with respect to reaching out to the members of JANN and providing information and support to the A-Z Team.

It should be noted that additional names and/or contact details were provided by respondents to the questionnaires including nineteen (19) for Film, eleven (11) for Animation and ten (10) for Music. A-Z also developed an automatically generated profile that was dispatched upon submission of the questionnaire by email to each respondent, as an incentive for them to complete the questionnaire.

As was expected, the Music Industry's data collection posed the greatest challenge due to the diversity and informality of the industry as well as the reluctance of persons to divulge information. This propensity to not divulge information reverberates amongst all persons involved directly or indirectly with the Music industry. This is quite ironic given that the A-Z Consultants encountered numerous knowledgeable stakeholders associated with the Music Industry who were able to provide verbally, historical information and could also breakdown issues related to trends and the structure of the Music Industry. However, there was minimal official data on the industry.

After numerous discussions with our contacts as well as practitioners in the industry, it was recognized that an alternative approach would be required to generate more meaningful results for the Music Industry. This alternative approach, which is the most significant innovation in this study, will be outlined in Chapter 5.

4.2 Overview of Participants

4.2.1 Demographics

Film

- The fifty-five (55) responses received from the Film Industry comprise 26 freelancers (2 of whom are registered with the Companies Office of Jamaica), 29 companies (one USA based with a licence to operate in Jamaica; two stated that they are not operating as a registered company), and one respondent stating they operate as both a registered company and freelancer.
- 58% of the respondents are female with ages ranging from 20-70, with 63% in the 20 - 40 age range.
- The majority (84%) of respondents operate mainly from Kingston and St Andrew but operations are also carried out across the country in St James (15.8%), Clarendon (10.5%), St Ann (7%), Westmoreland, Manchester, Portland each (5.3%), St Thomas, Hanover, St Catherine, and St Mary. No one stated that they operated in either St Elizabeth or Trelawny.
- Most respondents (46%) have been in operation for between 3 and 10 years and forty two percent (23) have been operating for more than 11 years. Eleven percent (6) have been operating for less than 2 years and fourteen percent (8) for more than 20 years.

Animation

- Based on the relatively small sample of respondents (23), there is some indication that Animation is more male dominated, accounting for just over 78% of the 23 respondents.
- Kingston and St. Andrew is the epicentre of the operations of the animators surveyed, with just over 82% indicating that they operate mainly out of Kingston and St Andrew.
- The Industry appears to be made up of younger practitioners with most respondents (48%) falling into the 21-30 age range and 39% falling into the 31-40 age range. Altogether 87% of the respondents are between the ages of 21 and 40.
- The industry appears to comprise mainly Freelancers, who in this survey accounted for 74% of the respondents, with companies accounting for just over seventeen percent.
- Most of the respondents have been in operation/working in the industry for under ten (10) years with close to 87% indicating thus. This is not surprising, given the dominant age range of 21-30 years.
- 35 % of the 17 respondents who answered this question indicated that they are registered with the Companies office of Jamaica with 59% percent of the respondents indicating that they are not operating as a company.

Music

- Based on the small sample of respondents (22), music also appears to be male dominated with over three-quarters of the respondents being male.
- Their ages range from 21-70 with the majority (54.5%) falling in the 31-40 age group.

- There is representation from all fourteen (14) parishes with the majority operating in Kingston & St Andrew (10) and Westmoreland (10), and St James (9). This means that some persons operate in more than one Parish.
- The majority (68 %) of the respondents have been in operation for over 10 years with seven operating for more than twenty (20) years.
- Most (68%) of the respondents are freelancers with only eight (36%) operating as a company.

4.2.2 Membership Association

There is membership in all associations across all three industries as shown in the table below. There is, however, still scope for practitioners to become members of the various relevant associations. The respondents in music demonstrated higher membership levels than the respondents in Film and Animation with all of them showing membership in at least one association, whereas 20% of the respondents in Film and 17% of the respondents in Animation indicated that they are not members of any of the Associations listed.

Table 6 shows Associations, Societies and Membership bodies to which the FAM Practitioners belong.

Table 7:FAM Practitioner Association Membership

ASSOCIATION	FILM *(count)*	ANIMATION *(count)*	MUSIC *(count)*	TOTAL
National Registry of Entertainment Practitioners (MCGES)	12	1	5	**18**
Jamaica Animator Nation Network (JANN)	3	14		**17**
Jamaica Film and TV Association (JAFTA)	33	4		**37**
Advertising Agencies Association of Jamaica	2			**2**
Jamaica Association of Composers, Authors and Publishers (JACAP)			4	**4**
Jamaica Music Society (JAMMS)	1		2	**3**
Jamaica Federation of Musicians (JFM)	1		9	**10**
Jamaica Reggae Industry Association (JARIA)	1		2	**3**
Jamaica Manufacturers & Exporters Assn Ltd				**0**
Jamaica Chamber of Commerce (JCC)	1			**1**
Jamaica Cultural Development Commission (JCDC)	3		2	**5**
Association of Independent Reggae Music (from USA)				**0**
Women in Film and Television	18	1		**19**
Jamaica Writers' Society (JAWS)	2			**2**
OTHER (FILM): BAFTA, AICP, BECTU, JAMPRO	1			**1**
JIPO, BMI, Entertainer Association of Jamaica			1	**1**
JAMCOPY	1			**1**
NONE	**11**	**4**		**15**

- Sixty (60) percent of the respondents in the Film Sector are members of JAFTA . 33% and 22% are members of the Women in Film and Television and the National Registry of

Entertainment Practitioners (MCGES**)**_respectively. Twenty (20) percent of the respondents indicated that they are not members of any organisation.

- Sixty (61) percent of the respondents in the Animation Sector are members of JANN with JAFTA membership accounting for 17% of the respondents. 17% of the respondents also indicated that there not members of any Association.

- Forty (41) precent of the respondents in the music sector said that they have membership in the Jamaica Federation of Musicians, whilst 23% cited membership in National Registry of Entertainment Practitioners (MCGES) and 4% indicated that they are members of JACAP. JARIA, JCDC and JAMMS each accounted for 9% of the respondents.

4.3 EXPORTS

4.3.1 Overview of Export Earnings

Eighty-One (81) of the 100 respondents or 81% across the three (3) FAM industries indicated that they export their products and services. The consultants grouped the percentage income earned from exports into five (5) ranges in order to get a sense of the extent to which their products/services are exported.

- The lowest range consists of those who earn no income (0%) from overseas customers.
- The low range comprises those who earn between 1 and 30% of their income from exports.
- The Middle range comprises earnings of 31-60%.
- The High range comprises earnings 61-90%.
- Finally, the highest range comprises earnings of between 91 and 100% from overseas customers.

This is further illustrated in the table below:

Table 8:Percentage (%) Income earned from Overseas Customers

RANGE	(%) INCOME EARNED	FILM		ANIMATION		MUSIC		TOTAL	
		COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL
0 (Lowest Range)	0	9	9	5	5	6	6	20	20
1 (Low Range)	1-10	6	22	7	8	5	9	18	39
	11-20	7		0		3		10	
	21-30	9		1		1		11	
2 (Middle Range)	31-40	6	11	1	3	2	3	9	17
	41-50	2		1		1		4	
	51-60	3		1		0		4	
3 (High Range)	61-70	3	9	0	4	1	2	4	15
	71-80	3		1		0		4	
	81-90	3		3		1		7	
4(Highest Range)	91-100	4	4	3	3	2	2	9	9
TOTAL		55		23		22		100	100

Across all the FAM industries,

- Most of the respondents (39%) fall in Range 1; earning between 1-30% of their total income from exports. Broken down across the sectors:
  - 40% of the respondents in the film sector
  - 35% of the respondents in the animation sector
  - 41 % of the respondents in the music sector

- 17% of the respondents fall into the Middle Range, earning between 31 – 60% of their income from exports, broken down as follows:
    - 24% of the respondents in the film sector
    - 13% of the respondents in the animation sector
    - 14 % of the respondents in the music sector

- 24% of the respondents fall into the High and Highest Ranges combined earning between 61-100% of their earnings, broken down as follows:
    - 20% of the respondents in the film sector
    - 30% of the respondents in the animation sector
    - 18 % of the respondents in the music sector

Interestingly, thirty percent of the Animators earn between 61% and 100% of their income from exports, whilst 24% of film practitioners did likewise. This is not surprising for the Animators, since there is a propensity to operate as Freelancers and to list oneself for work on freelance websites such as “upwork”, which is designed to connect “savvy businesses and professional freelancers” in a diverse array of fields, including animation.

4.3.2 Main Exporting Methods

The operators in the FAM industries are mainly services exporters. There are four modes by which the delivery of services may be exported as follows:

- Mode 1 – Cross Border when the service itself crosses the border.
- Mode 2 – Consumption Abroad, where the consumer travels across the border.
- Mode 3 – Commercial Presence, where a company or entity from one country sets up subsidiaries or branches in another country.
- Mode 4 – Movement of natural persons where the service supplier travels across the border.

Based on the findings to date and as shown in Table 8 below, the most common mode of exporting by FAM practitioners is Electronically (over the Internet) or by courier (Mode 1) as indicated by 78% of the Animation respondents, 53% of the Film respondents and 27% of Music respondents. The second most common mode across FAM is “Delivery to tourists or visitors who come to you “which is Mode 2 and is a delivery mechanism used by 47% of the Film practitioners, 9.5% of Animators and 32% of Musicians who responded.

With respect to Musicians, Travel or Tour (Mode 4) is also identified as another common mode of export with 32% of respondents using this mode.

Table 9: Main Exporting Methods

METHOD	FILM *(count)*	ANIMATION *(count)*	MUSIC *(count)*	FAM TOTAL
Electronically (over the Internet) or by courier (Mode 1)	29	18	6	53
Directly to tourists or visitors from overseas who come to you (Mode 2)	26	2	7	35
Travel or tour (Mode 4)	4		7	11
Operations set up overseas (Mode 3)	1		2	3
OTHER: Mode 1 • Satellite & Fibre Connectivity (F) *				
OTHER: Mode 2 • From overseas productions shooting in JA (F) • Live entertainment, musician, via hotels, live performances, for local businesspeople who entertain foreigners (M)	1		2	3
OTHER: Mode 4 • Travel & Produce (F) • Film Festivals (e.g., T.& T.) (F)	3		1	4
N/A	11	4	6	21

*Respondent also selected electronic delivery so not counted in this instance.

4.3.3 Main Services Exported

The services exported across the FAM industries are wide and varied especially in the case of the Film sector. The following are some of the services that FAM practitioners export:

FILM:

- Acting (film & voice)
- Art Direction
- Camera services
- Casting
- Commercials
- Consulting
- Content creation
- Copywriting
- Creative Direction
- Documentaries
- Editing
- Filming
- Fixer services
- Local and international Sports and News broadcast
- Local production
- Local talent
- Makeup
- Online training

- Photo Shoots for weddings and Events (Highlight of trips etc.)
- Photography
- Production support
- Script writing
- Set Design
- Translation services
- Video and Drone Videography/Photography
- Videography and graphics
- Voice-overs
- Wardrobe and costume design

ANIMATION:

- Graphic design
- Animation
- 2D animation
- 3D animation
- Illustration
- Editing
- Motion graphics
- Music video graphics
- Logos and other graphic design commissions and
- Character design

MUSIC:

- Beats
- Live performances
- Play instruments
- Merchandise
- Recorded music
- Video content
- Music production
- Talent and equipment rentals

4.3.4 Export Markets

The Respondents were asked to indicate the countries to which they export their services. Even though Jamaica does not represent an export country, we included same in order to ensure that we could get a 360 degree look of where the respondents are selling all of their services.

Jamaica

The survey found that 85% of the respondents across the FAM industries indicated that they sold their services in the Jamaican market with 15% indicating that they did not or that it was N/A. For the purpose of this question, we thought that answers of both "No" and "Not Applicable" mean that they did not trade in the respective market. Table 9 below speaks to the level of services which were sold on the domestic market.

Table 10:PERCENTAGE (%) EXPORTS AND MAIN TRADING COUNTRIES ACROSS FAM - JAMAICA

	RANGE	(%) INCOME EARNED	FILM		ANIMATION		MUSIC		TOTAL	
			COUNT & (%)	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	FAM COUNT	FAM TOTAL
JAMAICA	**0 (Lowest Range)**	0	5 (10%)	**5**	1	**1**	1	**1**	**7**	**7%**
	1 (Low Range)	1-10	3 (6%)	**8**	1	**5**	2	**3**	**6**	**16%**
		11-20	2 (4%)		2		0		**5**	
		21-30	3 (6%)		2		1		**5**	
	2 (Middle Range)	31-40	3 (6%)	**15**	1	**3**	1	**5**	**8**	**23%**
		41-50	6 (11%)		2		2		**7**	
		51-60	**6 (11%)**		0		2		**8**	
	3 (High Range)	**61-70**	**5 (10%)**	**14**	0	**5**	1	**6**	**6**	**25%**
		71-80	**7 (13%)**		2		3		**13**	
		81-90	**2 (4%)**		3		2		**6**	
	4(Highest Range)	**91-100**	**8 (15%)**	**8**	4	**4**	5	**5**	**17**	**17%**
	Unsure/NA		**1 (2%)**	**1**	**1**	**1**	**2**	**2**	**4**	**4%**
	SUB-TOTAL		**51**		**19**		**22**		**92**	**92%**
	NO RESPONSE		***4***		***4***		***0***		***8***	***8%***
	TOTAL		**55**		**23**		**22**		**100**	**100**

Film

- 81% of the respondents indicated that they sold their services to entities in Jamaica.
- 14% of the respondents fell in the low range which means that they earn between 1- 30% of their income from projects executed in Jamaica.
- 27% of the respondents fell in the middle range which indicate that they earn between 31-60% of their income domestically.
- 25% of the respondents earn between 61 – 90% of their income in Jamaica.
- 14.5% of the respondents fell in the highest range which indicate that they earn between 91 – 100% of their income from Jamaican projects.

Animation

- 78 percent of the respondents indicated that they sold their services in Jamaica.
- 22% of the respondents indicated that they earn between 1-30% of their income in Jamaica.
- 22% of the respondents earn between 61-90% of their income domestically.
- 17% of the respondents earn between 91-100% of their income in Jamaica.
- 13% of the respondents earn between 31-60% of their income from Jamaican projects.

Music[10]

- 86% of the respondents indicated that they sold their services in Jamaica.
- 27% of the respondents indicated that they earn between 61-90% of their income domestically.
- 23% of the respondents earn 91 – 100% of their income from Jamaican projects.
- 23 % of the respondents earn between 31 – 60% of the income from Jamaican entities.
- 14% of the respondents earn between 1 – 30% of their income in Jamaica.

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[10] Due to the fact that the Music sample is relatively small compared to the number and range of practitioners, the reliability of these results is not robust. The work in Chapter 5 compensates for this by estimating earnings based on a Census of nearly 500 artistes.

Caribbean

The survey found that 18% of respondents exported to the Caribbean even though the exports typically fell in the 1-10% of income earned category, which means that overall exports of these services to the Caribbean are relatively small.

Table 11: Percentage (%) Exports and Main Trading Countries Across FAM – The Caribbean

	RANGE	(%) INCOME EARNED	FILM		ANIMATION		MUSIC		TOTAL	
			COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL %
OTHER CARIBBEAN	0 (Lowest Range)	0	21	21	6	6	9	9	36	36%
	1 (Low Range)	1-10	6	10	2	2	2	3	9	15%
		11-20	4		0				4	
		21-30	0		0		1		1	
	2 (Middle Range)	31-40	2	3	0	0	0	0	2	3%
		41-50	1		0		0		1	
		51-60			0		0			
	3 (High Range)	61-70	0	0	0	0	0	0	0	0%
		71-80	0		0		0		0	
		81-90	0		0		0		0	
	4(Highest Range)	91-100	0	0	0	0	0	0	0	0%
	Unsure /NA/ BLANK		2	2	1	1	0	0	3	3%
	SUB-TOTAL (#responses)		36		8		12		56	56%
	NO RESPONSE		*19*		*15*		*10*		*44*	*44%*
	TOTAL		55		23		22		100	100%

Film

- 24% of the respondents indicated that exported their services to the Caribbean.
  - 16.6% of the respondents indicated that they earn between 1- 30% of their income in the Caribbean.
  - 5.4% of the respondents indicated that they earn between 31-60% of their income from Caribbean projects.

Animation

- There is not much export from Jamaican animators surveyed to the Caribbean markets – only 4.3% (1 respondent) indicated that they exported services to the Caribbean.

Music

- As in the case of animation, there is not much export from respondents surveyed in the music industry to the Caribbean with only 14% of the respondents indicating that they exported services to the Caribbean in the low range.

USA & Canada

The survey found that there is a significant amount of export to the North America by the respondents, with 69% of the respondents indicating that they exported their services to the North American (USA and Canada) market, as indicated in the Table below.

Table 12: Percentage (%) Exports and Main Trading Countries Across FAM - USA & Canada

	RANGE	(%) INCOME EARNED	FILM		ANIMATION		MUSIC		TOTAL	
			COUNT	Range Total	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	TOTAL (%)
USA & CANADA	0 (Lowest Range)	0	8	8	1	1	2	2	11	11%
	1 (Low Range)	1-10	10	26	4	6	4	10	18	42%
		11-20	11		2		2		15	
		21-30	5		0		4		9	
	2 (Middle Range)	31-40	3	6	1	5	1	2	5	13%
		41-50	2		2				4	
		51-60	1		2		1		4	
	3 (High Range)	61-70	0	3	1	5		1	1	9%
		71-80	1		4		1		6	
		81-90	2		0				2	
	4(Highest Range)	91-100	1	1	3	3	1	1	5	5%
	Unsure/NA		1	1	1	1	0	0	2	2%
	SUB-TOTAL (#responses)		45		21		16		82	82%
	NO RESPONSE		*10*		*2*		*6*		*18*	*18%*
	TOTAL		55		23		22		100	100

Film

- 65% of the respondents indicated that they exported their services to North America.
  - 47% of the respondents fell in the low range which means that they earn between 1- 30% of their income from North America.
  - 11% of the respondents fell in the middle range which indicated that they earn between 31-60% of their income in the North American market.
  - 5.4% of the respondents earn between 61 – 90% of their income in North America.

Animation

- 83% of the respondents indicated that they exported their services to North America.
    - 26% of the respondents indicated that they earn between 1-30% of their income in North America.
    - 22% of the respondents earn between 31-60% of their income in North America.
    - 22% of the respondents earn between 61-90% of their income in North America.
    - 13% of the respondents earn between 91-100% of their income in North America.

Music

- 63% of the respondents indicated that they earn income from the North American market
    - 47% of the respondents earn between 1 – 30% of their income in North America.
    - 9% of the respondents indicated that they earn between 61-90% of their income from exporting to North America.

UK & Europe

The survey found that there was less activity in terms of exports to the UK & Europe (compared to North America) by respondents across the FAM industries, with 48% of the respondents indicating that they exported their services to the UK and Europe, as indicated in the Table below.

Table 13: Percentage (%) Exports and Main Trading Countries Across FAM – UK & Europe

	RANGE	(%) INCOME EARNED	FILM COUNT	FILM %	ANIMATION COUNT	ANIMATION RANGE TOTAL	MUSIC COUNT	MUSIC RANGE TOTAL	TOTAL COUNT	RANGE TOTAL %
UK & EUROPE	0 (Lowest Range)	0	12	12	7	7	7	7	26	26%
	1 (Low Range)	1-10	16	23	2	4	4	8	22	35%
		11-20	2		1		1		4	
		21-30	5		1		3		9	
	2 (Middle Range)	31-40	1	4	1	1	1	2	3	7%
		41-50	3		0		0		3	
		51-60	0		0		1		1	
	3 (High Range)	61-70	0	0	0	0	0	0	0	0%
		71-80	0		0		0		0	
		81-90	0		0		0		0	
	4(Highest Range)	91-100	0	0	1	1	0	0	1	1%
	Unsure/NA		2	2	1	1	0	0	3	3%
	SUB-TOTAL (# responses)		41		14		17		72	72%
	NO RESPONSE		*14*		*9*		*5*		*28*	*28%*
	TOTAL		55		23		22		100	100

Film

- 49% of respondents indicated that they exported services to the UK/European Market
    - 42% of the respondents fell in the low range which means that they earn between 1-30% of their income from Europe/UK.
    - 7% of the respondents fell in the middle range which indicate that they earn between 31-60% of their income from Europe/UK.

Animation

- 21.7% of the respondents indicated that they export their services to Europe/UK.
    - 17.4% of the respondents indicated that they earn between 1-30% of their income in Europe/UK.
    - Only 1 (4.3%) of respondents indicated that export earnings fell in the 31-60% range.

Music

- 45% of the respondents indicated that they earn income from the Europe/UK.
    - 36% of the respondents earn between 1 – 30% of their income in Europe/UK.
      9% of the respondents indicated that they earn between 61-90% of their income from exporting to Europe/UK.

Other

Table 14: Percentage (%) Exports and Main Trading Countries Across FAM – Other

	RANGE	(%) INCOME EARNED	FILM COUNT	FILM %	ANIMATION COUNT	ANIMATION %	MUSIC COUNT	MUSIC %	TOTAL COUNT	RANGE TOTAL
OTHER	0 (Lowest Range)	0	13	13	5	5	4	4	22	22%
	1 (Low Range)	1-10	2`	3	2	2	2	2	6	7%
		11-20	1		0		0		1	
		21-30	0		0		0		0	
	2 (Middle Range)	31-40	0	2	0	0	1	1	1	3%
		41-50	2		0		0		2	
		51-60			0		0		0	
	3 (High Range)	61-70		1	0	0	0	0	0	1%
		71-80			0		0		1	
		81-90	1		0		0			
	4(Highest Range)	91-100	0	0	0	0	0	0	0	0%
	Unsure/NA		1	1	1	1	2	2	4	4%
	SUB-TOTAL (#responses)		20		8		9		37	37%
	NO RESPONSE		*35*		*15*		*13*		*63*	*64%*
	TOTAL		55		23		22		100	100

Only 11% of respondents across FAM Industries export to other regions in the world with the majority (6%) coming from the film industry.

4.4 IMPORTS

4.4.1 Overview of Imports – FAM Industries

From the information shown in the Table 14 below, equipment is the main import item across the FAM Industries, as indicated by a total of 59% of the respondents in the survey. This was followed by Software (21%) and Props/Set Items (20%).

More specifically:

- Practitioners in the film sector said that they import mainly equipment (62%) and props/set items (29%). A relatively small number of respondents (14.5%) indicated that they import professional services with 9% saying that they import machinery.
- Practitioners in the animation sector indicated that they import mainly equipment (69%) and software (65%). Machinery and Talent each accounted for 17% of the identified items imported by the Animators.

Respondents in the music sector said that they import mainly instruments (50%), equipment (41%) and software (27%).

Table 15: Main FAM Imports

FILM			ANIMATION			MUSIC			TOTAL (100)	
ITEM	**COUNT**	**%**	**ITEM**	**COUNT**	**%**	**ITEM**	**COUNT**	**%**		**%**
Equipment**	**34**	62	Equipment	**16**	69	Equipment	**9**	41	**59**	**59**
Props/Set Items	**16**	29	Props/Set Items	**3**	13	Props/Set Items	**1**	**4.5**	**20**	**20**
Professional Services *	**8**	14.5	Professional Services	**1**	4.3	Professional Services	**1**	**4.5**	**10**	**10**
Machinery	**5**	9	Machinery	**4**	17	Machinery	**2**	**9.1**	**11**	**11**
Talent*	**4**	7	Talent	**4**	17	Talent	**3**	**13.6**	**11**	**11**
Vehicles	**2**	3.6	Vehicles	**2**	8.6	Vehicles	**1**	**4.5**	**5**	**5**
			Software	**15**	65	Software	**6**	**27**	**21**	**21**
						Costumes	**2**	**9.1**	**2**	**2**
						Instruments	**11**	**50**	**11**	**11**
Other: Paint Supplies. Kit supplies, laptop, books	**4**	7	Other: Art Supplies, graphic assets	**2**	8.6				**6**	**6**
			All of the above	**1**	4.3				**1**	**1**
Unsure	**3**	5.4				Not Sure	**1**	**4.5**	**4**	**4**
None or N/A	**16**	29	None or N/A	**3**	13	None or N/A	**7**	**31.8**	**26**	**26**

4.4.2 Import Related Expenses

Respondents were asked how much they spend each year on imports. As Table 15 shows, Film practitioners who import spend up to JMD $5 Million each year with the majority spending between JMD$100,000 and $250,000 (10 respondents) and eight (8) respondents ending between JMD$500,000 and $1 Million. The variation in the size of film practitioners (in terms of number and size of projects each year) seems to be reflected in their import needs.

In the case of Animation, up to JMD$3,000,000 is spent annually on imports with most respondents spending between JMD $200,000 and $500,000 each year while in Music up to $4 Million is spent on imports annually by those who import. Most music respondents spend under JMD $100,000 on imports annually.

Table 16: Average Annual Spend on Imports Across FAM

EXPENSES (Range in JMD)	**FILM** ***count & %***	**ANIMATION** ***count & %***	**MUSIC** ***count & %***	**TOTAL** ***count & % over 3 fam industries***
$0	3 (5.5%)	1 (4%)	1 (4%)	5 %
$1-$20,000	1 (2%)	8 (35%)	3 (14%)	12%
$20,001-$50,000	7 (12%)	2 (9%)	7 (32%)	16%
$50,001-$100,000	11 (20%)	5 (22%)	3 (14%)	19%
$100,001-$300,000	10 (18%)	2 (9%)	5 (23%)	17%
$300,001-$500,000	5 (9%)	1 (4%)	0 (0%)	6%
$500,001- $1,000,000	3 (5.5%)	0 (0%)	2 (9%)	5%
$1,000,001-$3,000,000	5 (9%)	0 (0%)	1 (4%)	6%
$1,000,001-$5,000,000	1(2%)	0 (0%)	0 (0%)	1%
Over JMD $5 Million	1(2%)	0 (0%)	0 (0%)	1%
N/A or Unsure	6 (11%)	3 (13%)	0 (0%)	9 %
Varies	2 (4%)	0 (0%)	0 (0%)	2 %
No Response	0	1 (4%)	0 (0%)	1 %
TOTAL	55	23	22	100%

4.5 IP RELATED INCOME

From the data collected it seems the majority of FAM practitioners do not access IP related income with 63% stating they received no income from copyright sources. 23% of those who do, receive between 1 and 30% of their income from IP related sources. Across FAM Industries, film practitioners access the most from IP with 36% of them earning followed by Animation (35%) and finally music (28%). This is further broken down in table 16.

Table 17: IP Related Income

RANGE	PROFIT MARGIN (%)	FILM		ANIMATION		MUSIC		TOTAL
		COUNT	RANGE TOTAL %	COUNT	RANGE TOTAL %	COUNT	RANGE TOTAL %	COUNT OVER FAM (%)
0 (Lowest Range)	0	33(65%)	33(65%)	14(67%)	14(67%)	16(73%)	16(73%)	63%
1 (Low Range)	1-10 11-20 21-30	7 (14%) 3 (6%) 3 (6%)	13(26%)	4 (18%) 1 (5%) 0	5(23%)	2 (9%) 2 (9%) 1 (5%)	5(23%)	23%
2 (Middle Range)	31-40 41-50 51-60	1 (2%) 1 (2%) 0	2 (4%)	0 0 0	0	1 (5%) 0 0	1 (5%)	3%
3 (High Range)	61-70 71-80 81-90	0 1 (2%) 1 (2%)	2 (4%)	2 (9%) 1 (5%) 0	3(12%)	0 0 0	0	5%
4(Highest Range)	91-100	1 (2%)	1 (2%)	0	0	0	0	1%
NO RESPONSE			4		1		0	5%
TOTAL		55		23		22		100

It must be noted however that the data may not reflect the actual situation as we did not get responses from many major musicians or record labels/producers who are more likely to earn IP from neighbouring rights or performing rights[11].

The following table shows the main sources of IP across the FAM industries based on data collected:

Table 18: Sources of IP Related Income Across FAM Industries

ASSOCIATION	FILM *(count)*	ANIMATION *(count)*	MUSIC *(count)*	TOTAL
N/A	24	9	15	**48**
Literary Works	6	0	0	**6**
Musical Works	3	1	6	**10**
Artistic Works	9	7	2	**18**
Photographic Works	7	1	0	**8**

[11] These were also not given as options in the data collection instrument and therefore rights that are more relevant to musicians were not recorded.

Motion Pictures	7	2	0	**9**
Cinematographic	8	3	0	**11**
Computer Programmes & Databases	1	1	0	**2**
Other: • **JamCopy Member (F – printing rights)** • **Lesson Planning (F)** • **Treatments for Music Videos and commercials (F)** • **Logo Designs (A)** • **YouTube Content (A)**	3	2	0	**5**
TOTAL (IP sources accessed across FAM – *based on 90 responses***)**	69	24	23	**112**
Number of Responses	49	19	22	**90**

From this we can see that most people earn IP from Artistic Works (18% across FAM) followed by Cinematographic (11%) and Musical Works (10%).

4.6 EXPENSES AND PROFIT MARGINS

4.6.1 Monthly Expenses

Nineteen (19) % of respondents across all FAM industries indicated that they spend between $50,000 - $100,000 on monthly expenses and 17% said that they spend between $100,001 - $300,000. 16% of the respondents indicated a monthly spend on expenses of $20,001 - $50,000 and 12% indicated a monthly spend of < $20,000.

Film has the lowest number of practitioners (7.5%) with monthly expenses of JMD $20,000 and less. This is further broken down in Table 18.

Table 19:Monthly Expenses across FAM Industries

EXPENSES (Range in JMD)	**FILM** ***count & %***	**ANIMATION** ***count & %***	**MUSIC** ***count & %***	**TOTAL** ***count & % over 3 fam industries***
$0	**3 (5.5%)**	**1 (4%)**	**1 (4%)**	**5 %**
$1-$20,000	**1 (2%)**	**8 (35%)**	**3 (14%)**	**12%**
$20,001-$50,000	**7 (12%)**	**2 (9%)**	**7 (32%)**	**16%**
$50,001-$100,000	**11 (20%)**	**5 (22%)**	**3 (14%)**	**19%**
$100,001-$300,000	**10 (18%)**	**2 (9%)**	**5 (23%)**	**17%**
$300,001-$500,000	**5 (9%)**	**1 (4%)**	**0 (0%)**	**6%**
$500,001- $1,000,000	**3 (5.5%)**	**0 (0%)**	**2 (9%)**	**5%**
$1,000,001-$3,000,000	**5 (9%)**	**0 (0%)**	**1 (4%)**	**6%**
$3,000,001-$5,000,000	**1(2%)**	**0 (0%)**	**0 (0%)**	**1%**
Over JMD $5 Million	**1(2%) ***	**0 (0%)**	**0 (0%)**	**1%**

EXPENSES (Range in JMD)	FILM *count & %*	ANIMATION *count & %*	MUSIC *count & %*	TOTAL *count & % over 3 fam industries*
N/A or Unsure	**6 (11%)**	**3 (13%)**	**0 (0%)**	**9 %**
Varies	**2 (4%)**	**0 (0%)**	**0 (0%)**	**2 %**
No Response	**0**	**1 (4%)**	**0 (0%)**	**1 %**
TOTAL	**55**	**23**	**22**	**100%**

*One Film respondent stated they spend $15,000,000 each month in business expenses.

Film

Film practitioners' monthly expenses are spread across all ranges up to approximately JMD $5Million. In addition:

- The majority (20%) have monthly expenses between $50,001-$100,000.
- 18% have expenses between JMD $100,001 and $300,000.
- 12% indicated monthly expenses between $20,001-$50,000.
- 9% indicated monthly expenses of $300,001 - $500,000.
- Another 9% showed monthly expenses of $1,000,000-$3,000,000.
- 11% said that they are unsure or N/A

Animation

Animation has the highest percentage of practitioners (35%) who indicate that they spend less than $20,000 on expenses. Additionally:

- 22% said that they had expenses between JMD $50,001-$100,000.
- 9% of the respondents indicated a spend between $100,001 and $300,000.
- Another 9% indicated a spend between $20,001 - $50,000.
- One respondent indicated a monthly spend of $350,000.
- 13% said that they are unsure or N/A.

Music

The majority (32%) of the Music practitioners have indicated monthly expenses of between JMD $20,001-$50,000. In addition:

- 23% indicated expenses between $100,001 and $300,000.
- 14% indicated a spend between $20,001 - $50,000.
- Another 14% indicated a monthly spend between JMD $50,001-$100,000.
- One respondent spends over JMD $2.5 Million a month on expenses.

4.7 PROFIT MARGINS

The survey shows that the profit margins, which are the profits which practitioners make above their costs, mainly fall in the low range i.e., between 1-30% across all 3 FAM sub-sectors with 54% of the respondents indicating that their profit margins fall in this category. This is broken down as follows:

- 28% in the 1-10% profit margin range
- 14% in the 11-20% profit margin range
- 13% in the 21-30% profit margin range

The survey results point to the fact that the respondents across the FAM sectors have modest profit margins of 10 percent or less. Eighteen percent of the respondents indicated that they earn no profits.

Table 19 shows the profit margins earned by the respondents in the FAM industries:

Table 20: FAM Profit Margins

RANGE	PROFIT MARGIN (%)	FILM		ANIMATION		MUSIC		TOTAL COUNT OVER 3 FAM INDUSTRIES (%)
		COUNT	RANGE TOTAL %	COUNT	RANGE TOTAL %	COUNT	RANGE TOTAL %	
0 (Lowest Range)	0	14	14 (25%)	3	3 (13%)	2	2 (9%)	18%
1 (Low Range)	1-10	13	27 (49%)	8	14 (61%)	7	14 (64%)	54%
	11-20	5		4		5		
	21-30	9		2		2		
2 (Middle Range)	31-40	4	6 (11%)	0	2 (9%)	3	4 (18%)	12%
	41-50	1		2		0		
	51-60	1		0		1		
3 (High Range)	61-70	3	6 (11%)	0	3 (13%)	0	1 (4.5%)	10%
	71-80	2		1		1		
	81-90	1		2		0		
4(Highest Range)	91-100	2	2 (4%)	1	1 (4%)	1	1 (4.5%)	4%
TOTAL		55		23		22		100

Film

- 25% of respondents indicated that they earn no profits.
- 49% of the respondents said that they had profit margins between 1 – 30%.
- 26% of the respondents indicated that they had a profit margin between 31 – 100%, broken down as follows:
    - 11% between 31 – 60%

- 11% had profit margins between 61 – 90%
- 4% or have profit margins over 90%

Animation

- 13% of the respondents indicated that they earn no profits
- 61% of the respondents said that they had profit margins between 1 – 30%.
- 26% of the respondents indicated that they had profit margins between 31 – 100%.

Music

- 9% of the respondents indicated that they earn no profits
- 64% of the respondents said that they had profit margins between 1 – 30%.
- 27% of the respondents indicated that they had profit margins between 31 – 100%.

4.8 EMPLOYMENT RELATED FINDINGS

4.8.1 CONTRACT WORKERS

Film

Most Film practitioners (80%) 44) – both companies and Freelancers hire contract workers and freelancers on a per project basis, and this is highly dependent on the frequency, size of the project, timelines and budget. These workers are hired for a variety of purposes, however the most common responses included:

- hair and makeup (34%)
- production roles - including line producers & producers for production and post-production activities (29%);
- editing (22%);
- technical roles including lighting and sound (18%) and
- camera/shooting related services (13%).

According to the respondents, contract workers typically cost USD 250 per day or JMD 10,000-30,000 per day depending on the role. The average monthly spend on contract workers and freelancers ranges from JMD $300,000 – $1 Million depending on the frequency & size of projects. Some of the larger companies have higher monthly freelancer costs.

Animation

78% (18) of the respondents within the Animation sector do not hire contract workers or freelancers. The 21% of the respondents who hire contract workers indicated that they hire them for the following services:

- illustration
- graphic design
- animation
- voice overs
- rendering
- sound effects
- concept design

On average, 0.5 - 5 contract workers are hired each month, depending on the project, and are paid between JMD 5,000 and JMD 200,000 per month. However, one is not sure if the comparator is the same as one respondent indicated a payment of JMD 20,000 per element and another said that It depends on the nature of the project, which suggests that some persons were interpreting per month to mean per project or per element of a project.

Music

60% of the Music practitioners indicated that they hire contract workers on a per project basis including:

- musicians
- engineers
- vocalists
- video production services
- workers for live events
- drivers
- lighting & sound technicians.

69% stated that they hire between 1 and 8 contract workers each month paying between JMD$15,000 to $35,000 per worker per project.

4.8.2 EMPLOYEES

Film

75% of respondents (41) stated that they do not hire any employees, including some respondents who stated that they are operating as a company[12]. The other 25% (14) stated that they hire both full-time and part-time employees, with responses ranging from 1 to 110 employees.

- Of the 14 who hire, 10 (71%) hire under 7 people (half of which have 1-2 employees), three (21%) have between 20 and 53 employees and only one (8%) has 100-110 employees[13].

[12] Some companies consist of partners who would not be classed as employees.

[13] The company with over 100 employees is a sports tv channel, the other 3 companies with over 20 employees are advertising/marketing companies (these companies also stated that most of their income comes from producing commercials)

- Of the 14 who hire, 86% (12) hire only full-time employees, while the remaining 14% hire a combination of full and part-time staff.

Part Time employees tend to be paid between JMD 25,000 and JMD 75,000 each month while Full Time employees tend to be paid between JMD 40,000 and JMD 400,000 depending on the role. For example, Directors, Cinematographers, Key Actors and Line Producers are higher paying roles than Production Assistants, Prop Managers or Extras.

Animation

There are about 10 known studios operating in the animation subsector in Jamaica. However, the sector comprises mainly Freelancers. Some of the Freelancers, though not studios, operate like studios, in the sense that they hire freelance Contractors on a per project basis.

Nearly 9% or two (2) respondents stated that they hire both full-time and part-time employees. 91% did not hire any employees, including some who stated that they are operating as a company.

In both instances, the full-time employees worked 40 hours per week and for the entire year. The part-time employees worked five (5) months and four (4) months respectively. The full-time employees earn JMD 40,000/month and JMD 50,000/month respectively, while the part-time employees earn between JMD 10,000 and JMD 40,000 per month, depending on the project in one instance and JMD 25,000 per month in the other.

Music

Of the 22 Music respondents, 27% hire between one to two full-time and part-time employees. Full-Time employees are paid about JMD 70,000 a month, while Part-Time employees are paid between JMD 30,000 and JMD 60,000 a month.

4.9 VALUE CHAINS ACROSS THE FAM INDUSTRIES

4.9.1 FILM Projects and Value Chain

4.9.1.1 Projects and Production Activities

The 55 film respondents outlined the main projects or production activities in which they are involved, with the most popular being the following:

- production of commercials (71%)
- social media & online content (69%)
- documentaries (62%)
- training/educational programming (36%).

- Other common production activities include wedding/event videos (27%), music videos (24.5%) feature length films (22%) and short films (22%). The results are further outlined in the Table below.

Table 21: Main Film Projects

PROJECTS	COUNT	%
Feature Length Films	12	22%
Short Films	12	22%
Commercials	39	71%
Documentaries	34	62%
Social Media and Online Content	38	69%
Music Videos	14	24.5%
Wedding and Event Videos	15	27%
Training/Educational Programming	20	36%
Serialized Productions	4	7%
Animated films	2	3.6%
Photography	2	3.6%
Voice overs	1	1.8%
Other production activities mentioned include editing, consulting, theatre production, screenwriting, games, live broadcasts, sports and entertainment production, and craft services for production sets		

4.9.1.2 Budgets, Number of Projects and Frequency of Work

With budgets going up to JMD 20 Million, 47% (26) typically have budgets under JMD 1 Million; 24% (13) between JMD 1-2 Million; 12.7% (7) have budgets between JMD 2 Million and JMD 4 Million and three (5.4%) respondents stated that they have budgets between JMD10 - 20 Million.

Forty respondents (73%) have between 1-10 projects per year; nine (16%) have more than 10 and less than 50 projects while the remaining six (11%) have over 50 projects a year with one responded stating that they work on 300 projects each year (highest number). Twenty-two (40%) have work all year round while another eleven (20%) have work for six months of the year.

4.9.1.3 VALUE CHAIN

The Respondents across the FAM Industries indicated that they operate across all segments of the value chain. The information in the table below indicates that:

- 67% of the respondents operate in the Pre-production segment of the Value Chain
- Most (76%) of the respondents operate in the Production segment of the Value Chain
- 58% of the respondents operate in the Post-production segment of the Value Chain
- Only 27% of the respondents operate in the Exhibition/Distribution/Marketing segment of the Value Chain

Removing the ‘NA’, ‘No Answer’ and ‘0’ earnings from the segment of the Value Chain, we get an idea of the percentage of respondents that are active in the different areas of the Value Chain.

	PRE-PRODUCTION	**PRODUCTION**	**POST-PRODUCTION**	**EXHIBITION/ DISTRIBUTION/ MARKETING**
Number of respondents (after removing the No responses and “0” earnings)	37/55	42/55	32/55	15/55
Percentage of sample in area of value chain	**67%**	**76%**	**58%**	**27%**

The table below shows the most common responses given when the respondents were asked where along the value chain their employees or they themselves work. Respondents were able to place the **same individual** in different roles, indicating where people are situated along the value chain. People who did not hire staff indicated where they worked across the value chain. **The results suggest that practitioners across the film industry are more generalists rather than specialists.**

Table 22: Roles along the Film Value Chain

PRE-PRODUCTION		**PRODUCTION**		**POST-PRODUCTION**		**EXHIBITION/ DISTRIBUTION/ MARKETING**	
ROLES	**NO.**	**ROLES**	**NO.**	**ROLES**	**NO.**	**ROLES**	**NO.**
Producer	30	Producer	31	Film Editor	29	Marketing Staff	13
Production Assistant	30	Director	31	Graphic Artist	21	Administrative Staff	13
Screenwriter	26	Camera Crew	28	Recording and Sound Mixing Expert	17	Accountants	11
Casting Director	22	Location Manager	23	Music Editor	13	PR Staff	11
Scene/Set Designer	18	Cinematographer	23	Special Effects Specialist	13	Poster Designers	10
Costume Designer	15	Production Assistant	23	Musician	11	Publicists	9
Prop Artist/Designer	15	Actors	21	Animator	9	Advertisers	8
Prop Manager	14	Sound Technician (Sound Effects)	21	Illustrator	8	Technical Staff	4

PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ MARKETING	
Location Scout	13	Production Photographer	21	Editor (Offline – colouring, tinting, effects)	6	Film Sales Agents	3
Electrician	9	Makeup Artist	21	Editor (Online & Offline – colouring, tinting, effects)	6	Cinema Programmers	0
Director	8	Extras	17	Script Editor	5	Home Entertainment Staff (production of film for home use e.g. DVD production, Video on Demand)	0
Script Writer	7	Hair Stylist	17	Production Supervisor	5	Acquisition Staff (Film Buyers, Acquisition Rights)	0
Film Music Composer	7	Caterer/Crafty Providers	17	Film Prints/DVD Authoring	0		
Carpenter	7	Key Actors	16				
Researcher	6	Prop Manager	16				
IP/Content Creation	5	Grip	16				
Production Manager/Unit Production Manager	5	Gaffer	15				
Production Designer	4	Driver	14				
Script Editor	4	Runners	13				
Production Accountant	3	Production Coordinator	9				
Line Producer	2	Best Boy	8				
Location Manager (other)	2	Production Supervisor (cast & crew)	6				
Catering/Crafty PAs (from other)	2	Artistic Director	6				
Sculptor	1	Wardrobe Stylist/Dresser	6				
Model Builder	1	Stand-in	6				
		Assistant Director	5				
		Line Producer	3				
		Motion Graphic Artist	3				
		Continuity/Digital Technician	2				
		Visual Effects Supervisor	2				

PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ MARKETING	
OTHER: Talent, Transport, Illustrators, Executive Assistant, Creative Directors, Engineers, Painters, Location Managers, Fixer, Production Coordinator, Production Manager, Location Coordinator, 2nd Assistant Director, Camera Department, Local Producer, Local Coordinator, Construction Supervisors, Painters, Coordinators, Production Manager, Production Coordinator, Art Director, Animation Design, Cinematographer		OTHER: Wardrobe Buyer, Animator, Photographer, Videographer, Project Manager, Continuity, Digital Techs, Transportation, Transport Supervisors, Construction supervisors, Production Manager, Script Editing, Screen Writer		OTHER: Producer (overseas everything), Colourist		OTHER: Online/Streaming, Producer (Overseas everything)	
TOTAL (Representation in Each Area of Value Chain)	**256**		**440**		**154**		**110**
N/A	4	N/A	5	NA	11	N/A	28
RESPONSES	55	RESPONSES	55	RESPONSES	51	RESPONSES	48

* Roles specified in 'Other' were mentioned once by a respondent for all 3 FAM Industries

4.9.1.4 Film Value Chain Summary

Pre-production: 51 respondents stated they were involved in multiple areas across all roles in pre-production with each respondent playing an average of **3.8 roles**. The most common roles are Producers and Production Assistants with 55% of respondents indicating that they work in this segment of the Value Chain. This is followed by Screenwriters and Casting Directors which accounted for 47% and 40% of respondents respectively.

Production: The data collected shows that 50 practitioners (91% of the respondents) are involved across all roles in the Production segment of the value chain with each respondent playing an average of approximately **9 roles**. The most common roles in the production segment of the value chain are Producers and Directors (each role is filled by 56% of respondents) followed by Camera Crew (51%), Production Assistants (42%), Cinematographers (23%), Producers (23%), Production Photographers (22%), Actors (22%), Make-up Artists (22%) and Sound Technicians (22%).

Post-Production: Forty (40) or 73% of the respondents are involved in the post-production segment with each respondent playing an average of 3 roles. The survey found that the most common roles in the post-production segment of the value chain are Film Editors (30%) and Graphic Artists (22%), Recording and Sound-mixing Experts (17%), Music Editors (13%) and Special effects Specialists (13%). Only 51 people responded with 11 respondents indicating that post-production is not applicable to them nor their company.

Exhibition/ Distribution/ Marketing: The most common roles indicated by the 20 respondents who have representatives working in this area of the value chain included Administrative Staff (27%), Marketing Staff (27%), Poster Designers (21%), Accountants (23%), PR staff (23%) and Publicists (19%). Each respondent plays an average of 2.8 roles in this segment of the value chain. 28 respondents said Exhibition/ Distribution/ Marketing was not applicable to them or their company.

This suggests that production is the most active area of the value chain followed by pre-production, post-production and finally Exhibition/ Distribution/ Marketing.

4.9.1.5 Percentage (%) Income Earned/Output from Each Area of the Film Value Chain

Using the same range format used in previous tables, the following analysis addresses the percentage (%) income/output from each area of the film value chain.

The table below shows more clearly the frequency of responses within the different ranges.

Table 23: Percentage (%) Income/Output from Value Chain Categories

RANGE	(%) INCOME/ OUTPUT	PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ MARKETING	
		COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL
0 (Lowest Range)	**0**	12	**12** 25%	**7**	**7** 14%	**13**	**13** 29%	**28**	**28** 66%
1 (Low Range)	**1-10** **11-20** **21-30**	14 9 8	**31** 63%	4 1 4	**9** 18%	**7** **10** **6**	**23** 51%	**8** **4** **0**	**12** 28%
2 (Middle Range)	**31-40** **41-50** **51-60**	**1** 3 1	**5** 10%	2 7 9	**18** 37%	**2** **3** **1**	**6** 14%	**0** **1** **0**	**1** 2%
3 (High Range)	**61-70** **71-80** **81-90**	**0** **0** **0**	**0**	5 4 2	**11** 23%	**1** **1** **0**	**2** 4%	**0** **1** 0	**1** 2%
4(Highest Range)	**91-100**	1	**1** 2%	4	**4** 8%	1	**1** 2%	1	**1** 2%
NO ANSWER		6		6		10		12	
TOTAL		55		55		55		55	

The data on % income/output earned or produced supports the conclusion that production is the most active area of the value chain with only 14% indicating that they do not earn from production activities, the other 86% indicate that they earn income in this segment of the film value chain. This is followed by Pre-production (75%), Post-Production (71%) and Exhibition/Distribution/Marketing (34%).

With a deeper dive into the data, the following is observed:

- Range 4 (91-100% income/output): The highest number of respondents (8% or 4 respondents) stated that they earned or produced 100% of their income/output in the Production area of the value chain.

- Range 3 (61-90% income/output): 23% (11 of the 49 respondents) stated that they earn/produced between 60-90% within Production followed by Post-production with 4% (2 out of 45 respondents) and Exhibition/Distribution/Marketing with 2% (1 out of 43 respondents). No respondents stated they earn/produce between 61-90% from Pre-production.

- Range 2 (31-60% income/output): 37% of respondents (18) stated that they earn 31-60% in the Production area of the value chain. This is followed by Post-production with 14% (6), Pre-production 10% (5) and finally 2% (1) stating that they earn or produce 31-60% of income in Exhibition/Distribution/Marketing.

- Range 1 (1-30 income/output): The highest number of respondents (63% or 31 respondents) stated that they earn/produce 1-30% of their income/output from Pre-production, followed by 51% (13 out of 45 respondents) in Post-production, 28% (12 out of 43 respondents) in exhibition/distribution/marketing and finally 18% (9 out of 49 respondents) earn/produce between 1 and 30% within Production.

- Range 0 (0%): compared to other areas of the value chain fewer respondents said they earned nothing (Range 0 - 0% income/output) from Production with 14% (7) falling in this range. This was followed by pre-production 25% (12), post-production 29% (13) and exhibition/distribution/marketing where 66% (28 respondents) stated they earned or produced nothing.

4.9.2 ANIMATION Projects and Value Chain

4.9.2.1 Animation Projects and Production

The 23 respondents from the Animation Industry outlined the main projects or activities they or their companies engage in, as follows:

- Digital Animation accounts for 78% of the projects
- Traditional Animation and Social Media and Online content each accounts for 39%
- Commercials and You tube videos each accounts for 35% of the projects cited
- Website Animation account for approximately 30%
- Computer Generated Imagery, Short Films and Visual Effects each represents 26% of projects cited
- Architectural Pre-viz rendering, Music videos and Non-entertainment Animation each account for 22.7%
- The following are some other projects representing between 4% to 17% of the responses:
    - Interactive Educational courses
    - 3D Character creation and animation
    - Digital Illustration
    - Art Commissions
    - Digital Art
    - Serialised Production/TV Series
    - Games
    - Other Videos
    - Engineering Animation
    - Medical Animation
    - Feature Length Films
    - XR Animation (VR, AR, Hologram)

These projects listed above give an indication of the breadth of work done in the animation industry.

We are however not able to determine depth in terms of the numbers of skilled animators in the specific areas of animation.

Table 24: Main Animation Projects

PROJECTS	COUNT	%
Animation (Digital)	18	78
Animation (Traditional)	9	39
Social Media and Online Content (websites, ads)	9	39
Commercials	8	35
YouTube (videos)	8	35
Website Animation	7	30
Computer Generated Imagery (CGI)	6	26
Short Films	6	26
Visual Effects (VFX)	6	26
Architectural Pre-viz/Rendering	5	22
Non-Entertainment Animation/Documentaries	5	22
Music Videos	5	22
Other: interactive educational courses, 3D character creation and animation, digital illustration and art commissions and digital art.	5	22
Serialized Productions/TV Series	4	17
Games	4	17
Other Videos	3	13
Engineering animation (Simulations)	3	13
Training/Educational Programming	2	9
Medical Animations	2	9
XR Animation (VR, AR, Hologram)	2	9
Feature Length Films	1	4

4.9.2.2 Budgets, Number of Projects and Frequency of Work

91% of the respondents indicated that the typical budget for the types of projects they work on is Under 1 million JMD. One respondent has projects with a budget of JMD 2-4 million and one other respondent does projects in the over JMD 50 million category.

As it relates to project execution:

- 30% of the respondents execute three (3) projects annually.
- 17% of the respondents typically do 20 projects annually.
- 36% of the respondents do 1, 2, 4 and 10 projects per annum (9% each).

4.9.2.3 Animation Value Chain Breakdown

Given that most of the practitioners in the survey sample for Animation do not hire employees, the following is more of a representation of where animation practitioners place themselves (as well as people they work with) along the value chain. The data shows that practitioners work across the value chain. The results suggest that practitioners are multi-skilled and are more generalists rather than specialist.

PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ MARKETING	
ROLES	%	ROLES	%	ROLES	%	ROLES	%
Story Board Artist	48	3D modeller	35	Film & Video Editor	47	Poster Designers	46
Concept Artist	52	Character Animator	40	Edit Animation and Effects	42	Sales	26
Illustrator	72	2D Animator	60	Animation Director	37	Marketing Staff	26
Animatics Artist	38	Motion Graphic Artist	30	Sound Effects	37		
Animatic Designer	43	Environment Animator	**35**	Post-Production Editor	32		
Art Creative Director	48	Digital Painter	40	Music Editor	26		
Animation Director	38	Sound Designer/Sound Effects	30	Sound Designer	26		
Character, set and prop Designer	52	Animator Director	40	Director	21		
Background Designers	57	3D Animator	40	Credit Titling	16		
Graphic Artist	48	Effects Animator	**30**	Online & Offline Editor	16		
Rigging Artist	24	Key Frame Animator	30				
Sound Engineer	19	Digital and Ink Paint Artist	30				
		Motion Graphics Artist	30				
		Texture Artist	30				
		Visual Effects Artist	30				
Script Writer	38	Lighting Artist	25				
Modelling and Character Rigging	33	2D Modeller	25				
Researcher	28	Key Animator/Snr Animator	25				
Sound Design	22	Rig Animator	25				
Screen Writer	24	In between Animator	25				
		Lead Animator	25				
		Director	20				
VFX	22	Clean Up / Tie Down Artist	20				
Colour Key Artist/Background Artist	24	Compositor / Compositing Artist	20				
Background Inker & Painter	28	Senior Animator	20				
Coding/Scripting	19	In-between Animator	19				
Script Designer	14	Lead Special Effects	15				
		Animation Tools Programmer	15				
Rigging Lead	14	Cinematic Animator	15				

PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION	EXHIBITION/ DISTRIBUTION/ MARKETING
Layout Artist	27	Surfacing Artist	15		
Voice over Artist	14	Technical Animator	15		
Production Manager	14	Technical Artist	15		
		Cinematic Animator	15		
		Technical Artist	15		
		Cinematic Animator	15		

4.9.2.4 Value Chain Activity

The survey results relating to the value chain show that Animators are for the most part very cross-functional and multi-skilled and thus operate across the Pre-Production, Production and Post-Production segments of the value chain. In fact, from the information garnered from the respondents, most of the work is conducted in the Production Segment, followed by the Pre-Production and Post-production segments. There is minimal activity in the Distribution/Marketing segment of the value chain. The information garnered from this section of the survey will no doubt give an indication of some skills that are available in the animation Industry.

Pre-production: This is the creative part of the value chain and thus the respondents indicated that they participated in many of the roles in this segment. From the information given by the nineteen (19) respondents, the most common role is that of Illustrator, with 72% of the respondents indicating that they worked in this role or provided illustration services. The other common roles in this segment are Background Designing, Character, Set and Prop Designer, Concept Artist, Story Board Artist, Graphic Artist, Animatic Designer, Art Creative Director, Animatics Artist and Script Writer.

Production: The most common roles in this segment are 2D Animators, 3D Animators, Animator Directors, Character Animators, Digital Painters, 3D Modellers, Environment Animators, Effects Animators, Sound Designers, Motion Graphic Artists, Digital and Ink Paint Artists, Key Frame Animators, Texture Artists and Virtual Effect Artists. Other roles identified by the respondents included: Lighting Artists, 2D Modellers, Key Animators/Senior Animators, in-between Animators and Lead Animators. From the information gleaned from the Respondents, it is reasonable to assume that practitioners in this industry do most of their wok in the Production segment of the chain. This is not surprising since most of the animation creation activities take place in Production.

Post-Production: In terms of Post-Production, the survey found that the most common roles performed amongst the respondents are those of Film and Video Editor, Edit Animation and Effects, Animation Director, Sound Effects, Post-Production Editor, Music Editor and Sound Designer.

Exhibition/ Distribution/Marketing: In terms of this segment of the value chain, the respondents indicated that they conducted activities in marketing, sales and poster design.

1.9.2.5 Percentage (%) Monthly Income Earned/Output from Value Chain Categories

Using the range format established in previous tables, the frequency of responses as it relates to the percentage (%) income earned from each segment of the value chain are analysed below.

Table 25: Percentage (%) Monthly Income Earned/Output from Value Chain Categories

RANGE	(%) INCOME/ OUTPUT	PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ MARKETING	
		COUNT	RANGE TOTAL	COUNT		COUNT	RANGE TOTAL	COUNT	RANGE TOTAL
0 (Lowest Range)	**0**	**2**	**2**	**2**	**2**	**4**	**4**	**7**	**7**
1 (Low Range)	**1-10**	**9**		**4**		**5**		**7**	
	11-20	**1**	**11**	**2**	**9**	**3**	**10**	**0**	**9**
	21-30	**1**		**3**		**2**		**2**	
2 (Middle Range)	**31-40**	**1**		**0**		**3**		**0**	
	41-50	**2**	**4**	**3**	**4**	**0**	**3**	**0**	**0**
	51-60	**1**		**1**		**0**		**0**	
3 (High Range)	**61-70**	**1**		**1**		**0**		**0**	
	71-80	**0**	**1**	**1**	**3**	**0**	**1**	**0**	**0**
	81-90	**0**		**1**		**1**		**0**	
4(Highest Range)	**91-100**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**
NO ANSWER		**4**		**4**		**4**		**6**	
TOTAL		**23**		**23**		**23**		**23**	

In the Pre-Production segment of the Value Chain:

- 48% of the respondents indicated that they earn 1-30% of their monthly income from Pre-Production activities
- 17% earn 31- 60% of their monthly income from this segment of the value chain
- 8% earning 61-100% of their income in this segment.
- 8% of the respondents indicated that they do not earn any income in this segment of the value chain

In the Production segment:

- A smaller percentage of respondents (39%) earn between 1 – 30% of their monthly income from this segment of the value chain when compared to earnings in the Pre-Production Segment
- 17% of the respondents earn 31 – 60% of their monthly income from this segment
- 17% earn 61-100% of their monthly income from this segment of the value chain
    - A combined total of 34% of the respondents earn between 31-100% of their monthly income from this segment of the Value chain

- 8% of the respondents indicated that they do not earn any income in this segment of the Value Chain

With respect to Post-Production segment of the Value Chain, earnings are as follows:

- 43 % of the respondents indicated that they earn between 1 – 30% of their income
- 22 % of the respondents earn between 31 -100 % of their income in this segment of the value chain
- 17% of the respondents indicated that they do not earn any income

As it relates to earnings from Exhibition/Distribution/Marketing:

- 39% of the respondents earn between 1 – 30% of their income
- 4% earn between 91-100%
- 30 % of the respondents do not earn any income

4.9.3 MUSIC: PRODUCTION AND VALUE NETWORK

4.9.3.1 Music Projects

The music respondents listed the projects/activities from which they earn the most income.

These included:

- Live performances, including hotels
- Events
- DJ performances
- Resident band gigs
- Freelance musician
- Music production
- Studio rental
- Merchandising
- Teaching and singing lessons
- Public Address (P. A.) Systems rental

The following table shows the main music projects listed by respondents:

Table 26: Main Music Projects

PROJECTS	COUNT	PERCENTAGE (%)
DJ Performances (Events)	8	36%
Live performance	7	32%
Music production	4	18%
Musician in a Band/Resident Band	4	18%
Equipment Rental (e.g. P.A. Systems)	2	9%
Hotel Performances	2	9%
Live Recordings	1	.5%
Studio Rental	1	.5%
Merchandising	1	.5%
Singing Lessons	1	.5%
Teaching	1	.5%

- Most of the respondents (36%) said that their main projects are DJ Performances (Events)
- This was followed by Live Performances which accounted for 32% of the responses
- 18% of the respondents indicated that their main projects fall in the category of Music Production
- Musician in a Band/Resident Band accounted for 18% of the responses

1.9.3.2 Budgets, Number of Projects and Frequency of Work

The majority of respondents said that their project budgets are under JMD $1 Million with an average of 45 projects each year (the majority however (13) work on under 20 projects each year). Most of the respondents (60%) have work all year round.

Music Value Network

1.9.3.3 Music Value Network

It should be noted that some of the more detailed information on the Music Industry is shown in chapter 5 based on a more extensive Census conducted on the Music Industry. However, the Census did not address in the same level of detail certain activities.

The following is a snapshot of the Music Value Network from the sample of 22 respondents. Extracted below are the most common roles, representation in each segment of the value chain, and the (%) Income/Output in each area across the value network.

Table 27: Music Value Network

PUBLISHING SECTOR/MUSIC REPRESENTATION *(including count & %)*	RECORDING INDUSTRY *(including count & percentage (%) for each area)*				LIVE MUSIC SECTOR *(including count & %)*
	Pre-Production	Production	Post-Production	Exhibition/ Marketing/ Sales	
Songwriter *9 (45%)*	Musician 11 (61%)	Musician 12 (57%)	Music Producer 4 (25%)	Music Distributer 1 (7.7%)	Musician 12 (63%)
Composer 6 (30%)	Performer/ Artiste 9 (50%)	Performer/ Artiste 12 (57%)	Mastering Studio 4 (25%)	Physical Retailer 1 (7.7%)	Artiste/ Performer 11(60%)
Lyricist 6 (30%)	Back-up Singer 4 (22%)	Back-up Singer 27 (33%)	Music Manager 2 (12.5%)	Digital Music Distributer 1 (7.7%)	Back-up Singer 10 (53%)
Arranger 3 (15%)	Music Manager 4 (22%)	Music Producer 6 (29%)	Physical Media Manufacturer 2 (12.5%)	Mobile Music Portal Distributer 1 (7.7%)	Event Promoter/ Organiser – Festivals: 3 (16%) Shows: 2 (11%) Street Dances: 2 (11%)
Music Publisher 1 (5%)	Record Label 3 (17%)	Music/Record Producer 4 (19%)	Record Labels 2 (12.5%)	Video Sharing Service 1 (7.7%)	Live Music/ Event Streaming 3 (16%)
Clearing House 1 (5%)		Music Manager 4 (19%)	Background Music Service Provider 2 (12.5%)	Podcast 1 (7.7%)	Music Manager 3 (16%)
Licensing Agencies 1 (5%)		Business Manager 2 (9.5%)		Live Performances 1 (7.7%)	Business Manager 2 (11%)
Other: Playing & Singing 1 (5%)		Recording Studio Staff 2 (9.5%)			Music Venues 2 (11%)
		Recording Label Service 1 (5%)			Booking Agent; Artist Branding/Marketin g; Artist/ Performer Each was selected by 1 respondent (5% each)
Total representation across area of Value Network *(Sum of roles filled across Value Network as shown by respondents who checked the roles listed above)*					
28	**31**	**70**	**16**	**7**	**53**

PUBLISHING SECTOR/MUSIC REPRESENTATION *(including count & %)*	**RECORDING INDUSTRY** *(including count & percentage (%) for each area)*				**LIVE MUSIC SECTOR** *(including count & %)*
	Pre-Production	**Production**	**Post-Production**	**Exhibition/ Marketing/ Sales**	
Total respondents active in area of Value Network *(Based on number of responses minus those who stated the area was N/A to them)*					
11/22 respondents	**18/22 respondents**	**19/22 respondents**	**8/22 respondents**	**4/22 respondents**	**18/22 respondents**
20 Responses N/A: 9 (45%) No Response:2	18 responses N/A: 0 (0%) No Response:4	21 responses N/A: 2 (9.5%) No Response:3	16 Responses N/A: 8 (50%) No response:6	13 Responses N/A: 9 (69%) No Response:9	19 Responses N/A: 1 (5%) No Response:3

Publishing Sector/Music Representation

- Eight of the 11 respondents who work in the Publishing Sector
- Four respondents provided data on the number of representatives (reps) working in the Publishing Sector/Music Representation as follows:
  - 1 representative - 3 respondents
  - 1-10 representatives - 1 respondent
- Three respondents do have employees but did not provide data on number of representatives in the Publishing Sector/Music Representation

Recording Industry

*P*re-Production

- 13 of the 18 respondents who work in Pre-production in the Recording Industry have no employees
- Of these thirteen, six provided data on the number of representatives working in Pre-production within the Recording Industry as follows:
  - 1 representative - 4 respondents
  - 1-30 representatives -1 respondent
- Five respondents have employees but only one stated that they had 1 rep in Pre-production within the Recording Industry
  - 1 representative - 1 respondent

Production

- Fourteen of the nineteen respondents who work in Production in the Recording Industry have no employees

- Five of these provided data on the number of reps working in Production within the Recording Industry as follows:

    - 1 representative - 2 respondents
    - 2 representatives - 1 respondent
    - 3 representatives - 1 respondent
    - 1-30 representatives - 1 respondent

- One respondent has employees but did not provide data on number of reps in Production

Post-Production

- Seven of the eight respondents who work in post-production in the Recording Industry have no employees. Five of these respondents provided data on the number of representatives (reps) working in post-production (Recording Industry) as follows:

    - 1 representative - 3 respondents
    - 3 representatives - 1 respondent
    - 1-30 representatives - 1 respondent

- One respondent has employees but did not provide data on the number.

Distribution/Marketing/Sales

- All four respondents who work in distribution/marketing/sales in the Recording Industry have no employees.

- All four provided data on the number of representatives (reps) working in distribution/marketing/sales as follows:

    - 1 rep: 3 respondents
    - 1-40 reps:1 respondent

Live Music Sector

- 15 of the 18 respondents who work in the Live Music Sector have no employees. Six (6) of these provided data on the number of representatives (reps) working in the Live Music Sector as follows:

    - 1 rep: 4 respondents
    - 6 reps: 1 respondent
    - 1-30 reps: 1 respondent

- One respondent has employees and has 6 reps in the Live Music Sector as follows:

- 6 reps: 1 respondent

This shows that the Live Music Sector is the area in the Music value Network where there are the most representatives. It is also the area where there were the fewest 'N/A' responses with only one respondent stating that Live Music was not applicable to their operation. The data shows that the second highest number of representatives work within Production in the Recording Industry and only two respondents (9.5%) stating N/A. Exhibition/Marketing/Sales in the Recording Industry was one of two with the fewest number of representatives and the highest percentage (69%) of respondents who found this area not applicable to their operation. The percentage income/output recorded for the different areas of the value chain network supports this.

1.9.3.4 Percentage (%) Monthly Income/Output from Value Chain Categories

The table below shows that the Live Music Sector is where most income is earned/output is produced (reflected by the fact that it has the most responses across the mid to highest ranges when compared to other areas of the value network). In the lowest range where the (%) income/output equals '0' production had the fewest responses (only 2, or 14% of respondents earn nothing from this area).

Production and Post-Production within the Recording Industry were the next two areas of the value network where the most respondents earned income/produced output. The data indicates that the Publishing Sector/Music Representation is the least active area (79% of respondents do not earn here) followed by Exhibition/Distribution/Sales within the Recording Industry (75%). This is further illustrated in the table below.

Table 28: Percentage (%) Monthly Income/Output from the Music Value Network

		RECORDING INDUSTRY											
RANGE	(%) INCOME/ OUTPUT	PUBLISHING SECTOR/ MUSIC REPRESENTATION		PRE-PRODUCTION		PRODUCTION		POST-PRODUCTION		EXHIBITION/ DISTRIBUTION/ SALES		LIVE MUSIC SECTOR	
		COUNT & (%)	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL	COUNT	RANGE TOTAL
0 (Lowest Range)	0	11 (79%)	11 (79%)	9 (65%)	9 (65%)	7 (53%)	7 (53%)	7 (58%)	7 (58%)	9 (75%)	9 (75%)	2 (14.3%)	2 (14.3%)
1 (Low Range)	1-10	1(7%)	3 (21%)	2 (14%)	3 (21%)	2 (15%)	4 (31%)	2 (17%)	5 (42%)	1 (8.3%)	3 (25%)	3 (21.7%)	4 (28.7%)
	11-20	1(7%)		1 (7%)		1 (8%)		1 (8%)		1 (8.3%)		1 (7%)	
	21-30	1(7%)		0		1 (8%)		2 (17%)		1 (8.3%)		0	
2 (Middle Range)	31-40	0	0	0	2 (14%)	0	2 (16%)		0	0	0	2 (14.3%)	3 (21.3%)
	41-50	0		2 (14%)		1 (8%)		0		0		0	
	51-60	0		0		1 (8%)		0		0		1 (7%)	
3 (High Range)	61-70	0	0	0	0	0	0	0	0	0	0	1 (7%)	3 (21.3%)
	71-80	0		0		0		0		0		0	
	81-90	0		0		0		0		0		2 (14.3%)	
4(Highest Range)	91-100	0	0	0	0	0	0	0	0	0	0	2 (14.3%)	2 (14.3%)
NO ANSWER		7		7		8		9		9		8	
TOTAL		22		22		22		22		22		22	
NUMBER OF RESPONSES		*14*		*14*		*13*		*12*		*12*		*14*	

From the table it can be observed that Live Music is the area where the most income is earned, or output is produced (86%) along the value network, with 29% of respondents earning/producing between 81-100% in Live Music. The second most active area is Production in the Recording Industry where 47% earn/produce between 1-50% of their income/output followed by Pre-Production in the Recording Industry where 35% of respondents earn/produce between 1-50% of their income/output.

5.10 Support for FAM Industries

68% of the respondents indicated that they do not access incentives/ initiatives currently in place in Jamaica. 14% of the respondents have access to customs duty exemptions; 3% of the respondents benefit from Income Tax Relief; 2% access the Productive Tax Credit and another 3% benefit from the Co-production Treaty and another 2% from other incentives like the Chase Fund and grants.

INCENTIVES	FILM *(count)*	ANIMATION *(count)*	MUSIC *(count)*	TOTAL
Customs duty exemptions on imports of tools of the trade e.g. Productive Inputs Relief (PIR)	9	1	4	**14**
Income tax relief	0	2	1	**3**
Productive Tax Credit for training and research (PTC)	1	0	1	**2**
Employment Tax Credit (ETC)	0	0	1	**1**
Co-Production Treaty	2	0	1	**3**
None	30	20	18	**68**
OTHER **Chase Funding, Grants (F)**	2			**2**
Number of Responses	**42**	**23**	21	**86**

The relatively low level of "take-up" of Government Incentives in the table above may be an indication that the FAM practitioners need to be made more aware of the government incentives/ initiatives to which they may have access or what they need to do to become eligible. The fact that some FAM practitioners choose to remain in the informal sector also affects their ability to access these incentives.

Below are suggestions proposed by FAM practitioners for additional support for their respective industries.

4.10.1 FILM

- Import related initiatives
    - Duty free import of equipment
    - Access to used equipment and machinery in established markets at zero duties
    - Exemption for Motor vehicle imports

- Tax related initiatives (including income tax).
    - Tax exemptions for shooting films and videos in Jamaica
    - Tax exemptions for certain art supplies
    - Five-year income tax deferral for start-ups
    - Tax credits to help start-ups

- Initiatives to attract more productions to Jamaica
    - Larger scale promotion of Jamaica as a filming location and not just a tourist destination
    - Lower fees for overseas productions to attract more business.
    - Putting a cap on certain foreign production roles depending on the project/ depiction.
    - Some mechanism between Film and tourism that would make it less prohibitively expensive to take Jamaica resident film crew, technicians and talent on location outside of Kingston. The upside of this would be more exposure of Jamaica in general which will 1) help promote the country's tourism product. 2) make Jamaica a much more attractive destination for international film producers, who currently find this factor a major disincentive compared to other options.

- Initiatives for Jamaican Film Makers
    - Concessions for filming locally. Access to free locations for local filmmakers
    - There needs to be some incentive so that films can be made here or else we will lose the young people. There is a great deal of interest in Jamaican film, including our stories but without support, they will not get made.

- Investment/Grant related initiatives
    - A Film Fund (2)
    - Access to grants to fill needs
    - Grants to help start-ups
    - Grants to stage theatrical productions
    - Incentives for writers such as grants, prizes and competitions
    - More grants
    - Additional Co-Production Treaties beyond that with the UK

- Advertising Related Initiatives
    - Advertising support within the media or Government
    - Advertising and related creative services should be tax free as this would allow companies to invest more and grow the economy. Per the Senate agreement with the American Advertising Federation in the USA.

- Other Support
    - Technical support for TV and film producers
    - Import incentives for bringing in equipment i.e. making imports easier/cheaper. (2)
    - Access to studio space, computers and software.
    - Production incentives

4.10.2 ANIMATION

- Tax rebates/incentives (2)
- Custom duty exemptions/waivers (3)
- Waiving ALL duties on imported equipment
- Lowering import duties on tablets and other equipment (3)
- Film Development Fund Launch
- Animated Film Fund
- Scholarships for animation
- Incentives for institutions to improve animation programmes
- Partner with PayPal; so practitioners can more easily access their money
- Production tax incentives for foreign productions

4.10.3 MUSIC

- Export market development for entertainment products
- Grants to assist with Covid-19 fallout.
- Better protection of the local musicians and industry
- A better act than the Noise Abatement Act, a law that sees music as business and not noise.
- An easier way to provide longer term work permits with some countries.
- An easier way to access tools of trade so it does not cost to bring the equipment.

5.0 METHODOLOGY FOR CONDUCTING THE ECONOMIC ASSESSMENT

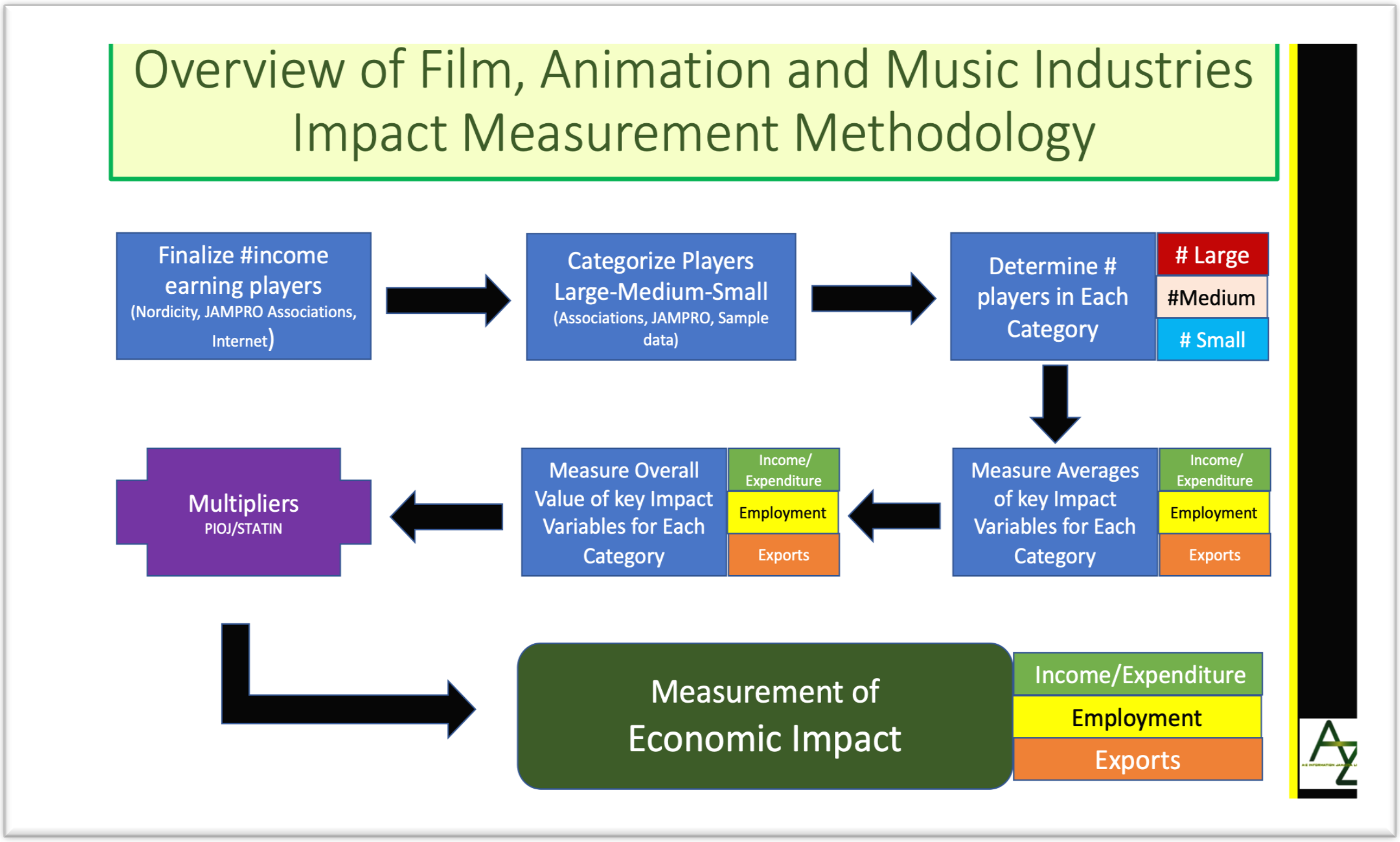
5.1 Introduction

The approach to measuring/estimating the impact of the FAM Industries on the Jamaican economy was laid out in the Inception Report for this project. The approach follows closely the approach used by Nordicity in carrying out similar studies on the U.K. and other economies. The approach is intended to operate with the following steps:

1. Estimate the number of players in each of the FAM Industries – based on estimates provided by industry associations; findings from online questionnaires administered to industry practitioners and associations; and substantiated (if possible) by data from STATIN and the recent Commonwealth Secretariat study conducted by Nordicity.
2. Identify where the various players operate in their respective value chain – based on findings from the online questionnaires and substantiated (if possible) by the recent Commonwealth Secretariat study conducted by Nordicity.
3. Estimate the direct contribution through the collection and analysis of income and expenditure data and information on the industry based on primary research (a questionnaire administered online to industry members) – using average incomes/expenditures obtained in the sample multiplied by the number of industry participants. These income/expenditure figures would be triangulated with income data available through JAMPRO, STATIN, the PIOJ and industry associations.
4. Estimate the employment impact in each industry based on primary research (a questionnaire administered online to industry members) – using average employment levels estimated from the sample. These employment figures would be triangulated with employment data available through STATIN and the PIOJ.
5. Estimate the export impact of players in each industry based on primary research (a questionnaire administered online to industry members). These export figures would be triangulated with export data available through STATIN and the PIOJ.
6. Utilize multipliers and other adjustment factors to estimate indirect and induced effects e.g. multiplier effects of income/expenditure by individuals/entities in the FAM industries. These estimates along with the direct contribution would then comprise the impact of the of the FAM industries.

As noticed from the above, the methodology is heavily dependent on the primary research results generated by the online questionnaires, which were developed by A-Z Information Jamaica Limited and approved by JAMPRO (with input from Nordicity). However, the data collection process using the online survey faced several challenges, which led to a lower response rate than expected. For Film and Animation, the results obtained from the online survey will certainly underpin the process of estimating the economic impact of the FAM industries, however, the relatively low response (in the Music Industry in particular) would lead to questions about the credibility and reliability of the study. Changes in the approach were therefore necessary in order to compensate for the deficiencies that may be created by insufficient responses in the FAM industries survey and especially in the Music Industry. Some of the challenges faced in the data collection process were outlined in Chapter 1.

The diagram below provides a graphical representation of the general approach to measuring economic impact of the FAM Industries. Below there is an outline of how the general approach was modified for each of the FAM industries based on the available information sources.



5.2 Economic Impact of Jamaica's Film Industry

5.2.1 Approach to Estimating the Economic Impact of the Film Industry

The response rate from the Film Industry was quite good with 55 completed questionnaires out of a (conservatively estimated) total possible amount of 50 firms and 500 freelancers involved in the Film Industry value chain. Given that the Consultants had no listing of practitioners, the Associations agreed to send the online data collection instrument to their members (JAFTA – over 300 members; and WIFTA – 70 members). The overall industry numbers were determined by the following:

- Examining estimates used in previous studies e.g. Ramesh Chaitoo[14] reported that a previous study had estimated 20 companies and 300 individuals practicing in the film industry;
- Discussions with industry experts from JAFTA as well as experienced practitioners – who estimated that apart from their members that there were over 40 firms and possibly over 1,000 freelancers if the informal sector was included. There was also concern by some industry practitioners about the adverse impact that the work of these "low cost and lower quality" industry players may have on the industry and the fact that they were often just acting to redistribute limited industry resources amongst the practitioners.
- Discussions with experts at JAMPRO who were considered by industry experts to have the best information base[15]

For the purpose of this study, this fairly large sample of 55 **should be representative of** the Jamaican Film Industry and is used in estimating the value of earnings by firms/companies and freelancers in the industry. This will form the core of the estimates used to determine the impact of the Film Industry on the Jamaican economy.

The following approach was then used to estimate the value of projects by practitioners in the Film industry as well as their level of employment, and exports.

1. Based on the sample information, which included 55 respondents (29 companies and 26 freelancers), the estimated value of projects for each practitioner was estimated by multiplying the typical budget for their projects by the average number of such projects per year (see table below). These results were generated from the responses to Q10a and Q10b in the Film Industry online survey.
2. For the purpose of analyzing practitioners by size, they were then divided into five Categories based on the sample. The five Categories are as follows:

Category	Annual Value of Projects
1	<$5 Million
2	5-15 million
3	>15-30 million
4	>50-100 Million
5	>100-200 Million

3. Based on the sample data, the **<u>average</u>** income/expenditure, employment, and exports for the sample and for each of the categories outlined above was computed.
4. The information obtained from 1-3 above is then used to estimate overall income/expenditure, employment and exports from the Film Industry.
5. Expenditure multipliers obtained from STATIN's 2007 input/output tables will be then applied to estimated income/expenditure to determine economic impact.

[15] The Entertainment Sector in CARICOM Key Challenges and Proposals for Action for IDB - Ramesh Chaitoo (2013)

5.2.2 Estimating the Direct Contribution to the Economy of **Jamaican Film Industry Practitioners**

The table below presents the sample data for the film industry with statistics segmented by Companies and Freelancers based on their budgets. These findings are largely based on estimated budget sizes and numbers of projects provided by practitioners in the sample survey.

Table 29: Summary of Sample Findings and Projections for the Value of Projects for the Film Industry

	Companies	Freelancers	Overall
Sample Size	29	26	55
Average Value of Projects	**3,034,483**	**1,250,000**	**2,190,909**
Average Budget for Projects per year	**26,586,207**	16,038,462	**21,600,000**
Total Value of Projects per year	**771,000,000**	**417,000,00**	**1,188,000,000**
Average number of projects per year	17	12	14
Population to Sample ratio	1.72	19.23	
Moving from Sample to Population			
Population of Practitioners	50	500	
Total Value of Projects per year	1,329,310,345	8,019,230,769	9,348,541,114
Estimated Total Indirect Contribution per year (JMD)			4,674,270,557
Estimated Total Induced Contribution per year (JMD)			14,022,811,671
Total Industry Contribution per year (JMD)			**28,045,623,342**

The above summary table shows:

- That the sample of 55 comprised 29 companies and 26 freelancers
- That based on typical budgets, the average value of projects handled by companies was JMD 3.034 million compared to JMD 1.25 million for freelancers, which suggests that the typical company project size is about 2.4 times the size of that of a typical freelancer.
- The average annual budget of companies is about JMD 26.6 million compared to about JMD 16 million for freelancers which is about 1.66 times greater.
- The average number of projects per year handled by companies is about 17 compared to about 12 by freelancers.
- Using these averages for the sample along with the estimates of the number of companies and freelancers in the industry, a Population to Sample ratio was estimated for companies (1.72) and for freelancers (19.23), respectively. These ratios are used to transform sampling information into Industry level information.
- Using these estimates, the overall budgets for companies in the Film Industry was estimated to be approximately **JMD 1.33 Billion**.

- Using these estimates, the overall budgets for freelancers in the Film Industry was estimated to be approximately **JMD 8.02 Billion** (mainly because of the large number of them and the structure of the industry).
- Even though Companies typically handle larger projects and a greater volume of projects, freelancers make an overall much greater contribution because of the relatively large number in the industry.
- The total direct contribution of companies and freelancers to GDP is about **JMD 9.35 Billion.**
- The total indirect contribution to GDP is estimated to be JMD 4.67 Billion
- The total induced expenditure is estimated to be JMD 14.02 Billion

Due to confidentiality agreements with respondents and associations, it was agreed that individual level details would not be shared in the report or with others. However, greater details on the estimates of the direct contribution are provided in the following tables without divulging individual company or freelancer information.

The tables provide information including the following:

- Number of Film Practitioners by Annual Budget Ranges
- Total Annual Budget of Film Practitioners by Annual Budget Ranges
- % of Total Annual Budget of Companies and Freelancers by Annual Budget Ranges
- % of Total Annual Budget broken down by Budget Ranges of Companies and Freelancers
- Average of Annual Budget of Companies Versus Freelancers by Annual Budget Ranges
- Average Budget Per Project for Company versus Freelancer
- Breakdown of Population of Practitioners by Budget Range for Companies and Freelancers
- Breakdown of Total Budget for Population of Practitioners by Budget Range by Companies and Freelancers.

The tables below are designed so that the interested reader can make inferences about

- The size of practitioners based on the budget range wherein larger entities fall into large budget ranges (e.g. Between JMD 100 Million and JMD 200 Million).
- The differences between companies and freelancers with respect to the same variables
- Data in absolute numbers and data in percentages.

Table 30: Number of Film Practitioners by Annual Budget Ranges (JMD)

Budget Range	Company	Freelancer	Grand Total
$5 m or less	9	13	22
Between $5 m & $15 m	8	5	13
Between $15m and $50m	7	6	13
Between $50m and $100m	3	2	5
Between $100m and $200m	2		2
Grand Total	**29**	**26**	**55**

Table 31: Total Annual Budget of Sample of Film Practitioners by Annual Budget Ranges (JMD)

Budget Range	Company	Freelancer	Grand Total
$5 m or less	22,500,000	22,000,000	44,500,000
Between $5 m & $15 m	83,500,000	61,000,000	144,500,000
Between $15m and $50m	195,000,000	184,000,000	379,000,000
Between $50m and $100m	210,000,000	150,000,000	360,000,000
Between $100m and $200m	260,000,000		260,000,000
Grand Total	**771,000,000**	**417,000,000**	**1,188,000,000**

Table 32: Percentage (%) of Total Annual Budget of Companies Versus Freelancers by Annual Budget Ranges

Budget Range	Company	Freelancer	Grand Total
$5 m or less	50.56%	49.44%	100.00%
Between $5 m & $15 m	57.79%	42.21%	100.00%
Between $15m and $50m	51.45%	48.55%	100.00%
Between $50m and $100m	58.33%	41.67%	100.00%
Between $100m and $200m	100.00%	0.00%	100.00%
Grand Total	**64.90%**	**35.10%**	**100.00%**

Table 33: Percentage (%) of Total Annual Budget by Budget Ranges of Companies Versus Freelancers

Budget Range	Company	Freelancer	Grand Total
$5 m or less	2.92%	5.28%	3.75%
Between $5 m & $15 m	10.83%	14.63%	12.16%
Between $15m and $50m	25.29%	44.12%	31.90%
Between $50m and $100m	27.24%	35.97%	30.30%
Between $100m and $200m	33.72%	0.00%	21.89%
Grand Total	**100.00%**	**100.00%**	**100.00%**

Table 34: Average of Annual Budget of Companies Versus Freelancers by Annual Budget Ranges (JMD)

Budget Range	Company	Freelancer	Grand Total
$5 m or less	2,500,000	1,692,308	2,022,727
Between $5 m & $15 m	10,437,500	12,200,000	11,115,385
Between $15m and $50m	27,857,143	30,666,667	29,153,846
Between $50m and $100m	70,000,000	75,000,000	72,000,000
Between $100m and $200m	130,000,000		130,000,000
Grand Total	**26,586,207**	**16,038,462**	**21,600,000**

Table 35: Average Budget Per Project for Company versus Freelancer

Budget Range	Company	Freelancer	Grand Total
$5 m or less	1,111,111	576,923	795,455
Between $5 m & $15 m	1,187,500	1,900,000	1,461,538
Between $15m and $50m	7,285,714	1,833,333	4,769,231
Between $50m and $100m	1,166,667	2,250,000	1,600,000
Between $100m and $200m	7,000,000		7,000,000
Grand Total	**3,034,483**	**1,250,000**	**2,190,909**

5.2.3 Population Estimates

Table 36: Breakdown of Population of Practitioners By Budget Range for Companies and Freelancers

Budget Range	**Company**	**Freelancers**	**Overall**
$5 m or less	16	250	266
Between $5m & $15 m	14	96	110
Between $15m and $50m	12	115	127
Between $50m and $100m	5	38	44
Between $100m and $200m	3	-	3
Grand Total	50	500	550

Table 37: Breakdown of Total Budget for Population of Practitioners By Budget Range by Companies and Freelancers

Budget Range	**Company**	**Freelancers**	**Overall**
$5 m or less	38,793,103	423,076,923	461,870,027
Between $5m & $15m	143,965,517	1,173,076,923	1,317,042,440
Between $15m and $50m	336,206,897	3,538,461,538	3,874,668,435
Between $50m and $100m	362,068,966	2,884,615,385	3,246,684,350
Between $100m and $200m	448,275,862	-	448,275,862
Grand Total	1,329,310,345	8,019,230,769	9,348,541,114

The above data, analysis and projections show that the direct contribution of the Film industry is over JMD 9 Billion. The final report will estimate other direct contribution as well as indirect and induced impact on the Jamaican economy.

Indirect and Induced Effects of Income from Practitioners Earnings

The indirect and induced effects of the income earned by practitioners in the Film, Animation and Music industries is likely to be much greater than the direct effects due to multiplier effects. For example, in simple terms, if practitioners in Film earn JMD 9,348,541,114 as shown in Table 28, they use those earnings to pay their bills, paying wages and salaries to their workers, rent to their landlords, payments for the raw materials they use, payment to advisers, etc. The income left over is profit. The practitioners and each of the persons with whom they have spent would take their new income and spend some of it. Those purchases then become new income to the sellers, who then turn around and spend a portion of it. That spending becomes someone else's income. The process continues, though because economic agents spend only part of their income, the numbers get smaller in each round. When the dust settles the amount of new income generated is multiple times the initial increase in spending–hence, the name the spending multiplier.

Unfortunately, Jamaica has no recent estimates of multipliers in different sectors. Therefore, for this study assumptions will be made about multiplier effects., The multiplier estimates will be conservative and within the range of those used by Vanus James in his 2007 study.

Indirect Expenditure

Indirect expenditure are as a result of hiring of staff, purchase of equipment, hardware, software, and other inputs in the production activities of the Film industry. For the purpose of this study, it is assumed that 50% of the total budget of the industry is spent on these indirect factors. This amounts to **JMD 9,348,541,114 *0.5 = JMD 4,674,270,557.**

Induced Expenditure

It is further assumed that there are other expenditures on other goods and services not related to the Film Industry but induced by earnings emanating from the Film industry such as food, clothing, school fees, accommodation, transportation, etc. It is estimated that these amount to 1.5 times the direct contribution, which amounts **to JMD 9,348,541,114 *1.5 =**
JMD 14,022,811,671

The overall impact of Film Industry on the Economy is estimated to be as follows:

Type of Impact	**JMD Millions**
Direct Contribution (Total Budgets)	9,348.5
Indirect Contribution (Expenditure related to generating earnings in the Film Industry)	4,674.3
Induced Expenditure (Expenditure in the general economy not related to the Film Industry)	14,022.8
Total	**28,045.6**

5.3 The Economic Impact of Jamaica's Animation Industry

5.3.1 Approach to Animation

JANN has a membership of 300, however only 35 are practicing Animators. The others include students, teachers and others who are not practitioners. There are also a few that are involved in both Film and Animation who chose to complete the Film data collection instrument instead. After extensive promotion and distribution by JANN of the Animation data collection instrument to Animators that are members, 23 responses were obtained, 14 of whom indicated that they were members of JANN.

The response rate from the Animation Industry was not as good as for Film with 23 completed questionnaires out of a (conservatively estimated) total possible amount of 20 firms and 200 income earning freelancers involved in the Animation Industry value chain. Given that the Consultants had no listing of practitioners, JANN agreed to send the online data collection instrument to their members. JANN has a membership of 300, however only 35 are practicing Animators. The others include students, teachers and others who are not practitioners. There are also a few that are involved in both Film and Animation who chose to complete the Film data collection instrument instead.

The overall industry numbers were determined through discussions with industry practitioners and from information from JANN, YEDAIP and JAMPRO – who estimated that there are 20-25 companies and possibly over 500 freelancers in the Jamaican industry based on the number trained and working in companies or as freelancers. However, industry experts suggested that even though the number of trained animators was high, the number that were sufficiently skilled to earn as freelancers was limited. We therefore estimate 200 freelancers as a realistic population of those that earn from animation.

For the purpose of this study, this sample of 23 is used in estimating the value of earnings by companies and freelancers in the industry. This will form the core of the estimates used to determine the contribution and economic impact of the Animation Industry on the Jamaican economy.

The following approach was then used to estimate the value of projects by practitioners in the Animation industry as well as their level of employment, and exports.

1. Based on the sample information, which included 23 respondents (5 companies and 18 freelancers), the estimated value of projects for each practitioner was estimated by multiplying the typical budget for their projects by the average number of such projects per year (see table below). These results were generated from the responses to Q10a and Q10b in the Animation Industry online survey.
2. For the purpose of analyzing practitioners by size, they were then divided into five Categories based on the sample. The five Categories are as follows:

Category	Annual Value of Projects (JMD)
1	0-500,000
2	>500,000-5 million
3	>5 mill - 10 million
4	>10 mill - 100 million
5	100 Mil - 200 Million

3. Based on the sample data, the **average** income/expenditure, employment, and exports for the sample and for each of the categories outlined above was computed.

4. The information obtained above is then used to estimate overall income/expenditure, employment and exports from the Animation Industry by multiplying average budget for projects by the total number of such projects per year.

5. Expenditure multipliers obtained from STATIN's 2007 input/output tables will be then applied to estimated income/expenditure to determine economic impact.

Given the above situation, some of which is detailed in Chapter 4, the following approach was used to determine the value of projects from the Animation Industry. This is the same approach that was used for the Film industry.

1. Based on the sample composition, respondents were classified into the five categories shown above in terms of their size based on information provided on their average size of project and the typical number of projects per annum in the pre-pandemic period.

2. For direct contribution, we were then able to estimate the average earnings/expenditure for each category – based on information from the sample. Where necessary, this information would be triangulated with information obtained from JANN and other key industry stakeholders.

3. The information generated was then used to estimate direct contribution from the Animation industry in Jamaica.

4. Expenditure multipliers estimates will then be applied to direct contribution to determine indirect impact and induced effects that combine to measure economic impact.

The table below presents the sample data for the Animation industry with practitioners ordered by estimated Total Value of Projects based on their budgets.

Table 38: Summary of Sample Findings and Projections for the Value of Projects for Animation Industry

Measure	Companies	Freelancers	Overall
Sample Size	5	18	23
Average Value of Projects	**10,900,000**	**250,000**	**2,565,217**
Average Budget for Projects per year	**42,300,000**	**877,778**	**9,882,609**
Total Value of Projects per year	**211,500,000**	**15,800,000**	**227,300,000**
Average number of projects per year	10	6	7
Population to Sample ratio	4	11.1	
Moving from Sample to Population			
Population of Practitioners	20	200	
Total Value of Projects per year/Direct Contribution (JMD)	846,000,000	175,380,000	1,021,380,000
Estimated Total Indirect Contribution per year (JMD)			255,345,000
Estimated Total Induced Contribution per year (JMD)			510,690,000
Total Industry Contribution per year (JMD)			1,787,415,000

The above summary table shows:

- That the sample of 23 comprised 5 companies and 18 freelancers
- That based on typical budgets, the average value of projects handled by companies was JMD 10.9 million compared to JMD 250,000 for freelancers, which suggests that the typical company project size is about 43 times the size of that of a typical freelancer.
- The average annual budget of companies is about JMD 211.5 million compared to about JMD 16 million for freelancers which is about 13.4 times greater.
- The average number of projects per year handled by companies is about 10 compared to about 6 by freelancers.
- Using these averages for the sample along with the estimates of the number of companies and freelancers in the industry, a Population to Sample ratio was estimated for companies (4) and for freelancers (11.1), respectively. These ratios are used to transform sampling information into Industry level information.
- Using these estimates, the overall budgets for companies in the Animation Industry was estimated to be approximately **JMD 846 Million**.
- Using these estimates, the overall budgets for freelancers in the Animation Industry was estimated to be approximately **JMD 175 Million**.
- Companies typically handle larger projects and a greater volume of projects while freelancers make an overall smaller contribution despite their relatively large number in

the industry. This suggests that the Animation Industry is dominated by a few very large companies.

- The total direct contribution of companies and freelancers to GDP is about **JMD 1.021 Billion.**[16]
- The total indirect contribution of companies and freelancers to GDP is about **JMD 255.3 Billion**
- The total induced contribution of companies and freelancers to GDP is about **JMD 510.7 Billion**
- Overall economic impact of the Animation Industry = **JMD (1.021+0.2553+0.5107) = JMD 1.787 Billion**

Due to confidentiality agreements with respondents and associations, it was agreed that individual level details would not be shared in the report or with others. However, greater details on the estimates of the direct contribution are provided in the following tables without divulging individual company or freelancer information.

The tables provide information including the following:

- Number of Practitioners by Annual Budget Ranges
- Total Annual Budget of Animation Practitioners by Annual Budget Ranges
- Average of Annual Budget of Companies Versus Freelancers by Annual Budget Ranges
- Average Budget Per Project for Company versus Freelancer
- Average Number of Projects per year for Companies and Freelancers

The tables below are designed so that the interested reader can make inferences about

- The size of practitioners' outputs based on the budget range wherein larger entities fall into large budget ranges (e.g. Between JMD 100 Million and JMD 200 Million) .
- The differences between companies and freelancers with respect to the same variables
- Data in absolute numbers and data in percentages.

Table 39: Number of Practitioners by Annual Budget Ranges

Budget Range	Company	Freelancer	Grand Total
0-500,000		10	10
>500,000-5 mill	1	7	8
>5 mill - 10 mill	2	1	3
>10 mill - 100 mill	1		1
100 Mil - 200 Mill	1		1
Grand Total	**5**	**18**	**23**

[16] In the Final Report, the Indirect contributions as well as the induced effects will also be estimated in order to estimate the overall economic impact of the Animation Industry on the Jamaican economy.

Table 40: Total Annual Budget of Animation Practitioners by Annual Budget Ranges

Budget Range	Company	Freelancer	Grand Total
0-500,000		2,300,000	2,300,000
>500,000-5 mill	1,500,000	8,500,000	10,000,000
>5 mill - 10 mill	15,000,000	5,000,000	20,000,000
>10 mill - 100 mill	45,000,000		45,000,000
100 Mil - 200 Mill	150,000,000		150,000,000
Grand Total	**211,500,000**	**15,800,000**	**227,300,000**

Table 41: Average of Annual Budget of Companies Versus Freelancers by Annual Budget Ranges

Budget Range	Company	Freelancer	Grand Total
0-500,000		230,000	230,000
>500,000-5 mill	1,500,000	1,214,286	1,250,000
>5 mill - 10 mill	7,500,000	5,000,000	6,666,667
>10 mill - 100 mill	45,000,000		45,000,000
100 Mil - 200 Mill	150,000,000		150,000,000
Grand Total	**42,300,000**	**877,778**	**9,882,609**

Table 42: Average Budget Per Project for Company versus Freelancer

Budget Range	Company	Freelancer	Grand Total
0-500,000		185,000	185,000
>500,000-5 mill	500,000	307,143	331,250
>5 mill - 10 mill	500,000	500,000	500,000
>10 mill - 100 mill	3,000,000		3,000,000
100 Mil - 200 mill	50,000,000		50,000,000
Grand Total	**10,900,000**	**250,000**	**2,565,217**

Table 43: Average Number of Projects per year for Companies and Freelancers

Budget Range	Company	Freelancer	Grand Total
0-500,000		3	3
>500,000-5 mill	3	10	9
>5 mill - 10 mill	15	10	13
>10 mill - 100 mill	15		15
100 Mil - 200 mill	3		3
Grand Total	**10**	**6**	**7**

Indirect Contribution to GDP from the Animation Industry

It is assumed that there are indirect expenditures in the animation industry as a result of hiring of staff, purchase of equipment, hardware, software, and other inputs in the production activities of the industry. For the purpose of this study, it is assumed that 25% of the total budget of the industry is spent on these indirect factors.

It is therefore estimated that the indirect contribution of the animation Industry is JMD1,021,380,00 *25% = **JMD 255.3 Million**.

Induced Contribution to GDP from the Animation Industry

It is further assumed that there are other expenditures on other goods and services not related to the Animation Industry but induced by earnings emanating from the Animation industry such as food, clothing, school fees, accommodation, transportation, etc. It is estimated that these amount to 100% of the direct contribution, which amounts to JMD1,021,380,000 *100% = **JMD 1.021 Billion.**

The induced multiplier for Animation is assumed to be less than that for Film because the Film Industry involves a significant amount of different players in different communities and occupation groups.

5.3 The Economic Impact of Jamaica's Music Industry

5.3.1 Approach to Music

Given the relatively low response rate from the Music Industry, the A-Z Consultants, with the agreement of JAMPRO, decided to supplement the information derived from the sample with a more direct approach to generate the required information on the contribution of the music industry to GDP. This more direct **A-Z Approach** is based on the following approach:

1. Placing each artiste in a category based on his/her typical earnings (range) per performance
2. Placing each artiste in a category based on his/her typical estimated number of performances per year
3. Multiplying 1 above by 2 above to estimate the Total Earnings per year from performances for each artiste.
4. Estimating overall Intellectual property earnings for the Industry from figures produced by the relevant Collective Management Organisations (CMOs) (e.g. JACAP, JAMMS, PRS, BMI, etc.) and published in the Economic and Social Survey of Jamaica (ESSJ) which is prepared annually by the Planning Institute of Jamaica (PIOJ).
5. Estimating other income in the Music Industry by discussions with key informants or published statistics. This would include earnings from the following:

    a. Recording Studios
    b. Sound Systems
    c. Management of artistes
    d. Booking Agents
    e. Publishers and IP related persons
    f. Promoters
    g. Producers
    h. Production Companies
    i. Record Labels
    j. Music Festivals e.g. Sumfest, Rebel Salute, Unrulyfest

5.3.2 Information Sources

The opportunity to use the approach outlined above to estimate earnings in the Music Industry is made possible by the following factors:

- Information about industry practitioners is available on the internet
- Many persons in the Music industry are well known and are promoted on the internet
- There are many knowledgeable practitioners and other stakeholders associated with the Music Industry who can provide valuable information that can be used to guide and validate the generation of information. **It may seem paradoxical that while knowledge**

and understanding of this industry abounds, there is minimal data available on the industry. It is hoped that this "A-Z approach" will put together this baseline data, which can be built upon and finessed in future time periods.

In executing the A-Z Approach, the consultants generated a list of about 450 Jamaican artistes and bands in the music industry. It is estimated that this list contains most of the population of income earning Jamaican artistes.

Table 44: Table: Number of Artistes by Type

Artiste	Number
Male Artistes	269
Female Artistes	76
Gospel Artiste	54
Bands and Groups	33
Cabaret Singers	20*
Total	**452**

*Estimated

The following approach was then used to estimate their earnings from live performances.

5.3.3 Identifying Income Earning Artistes

A-Z used various sources of information to identify all known income earning artistes/practitioners (definitely the top 20%). Those that are missing are likely to be relatively new or relatively unknown, in which case each would not affect the aggregate earnings of artistes/bands. The process of identifying artistes included the following:

- Google searches on the internet to find an initial listing of Jamaican artistes
- A-Z Team members incorporating the names of artistes that were known to the Team but not on the lists garnered from the internet
- Information contained in different Jamaican media reports e.g. Observer and Gleaner
- Information obtained from collaborating industry experts.

The information collected was then entered into a Microsoft Excel Spreadsheet which contained several Worksheets for Male Artistes, Female Artistes, Gospel Artistes, and Bands and Groups.

5.3.4 Categorising Artistes by Estimated Earnings Per Performance

1. Artistes/practitioners were segmented into seven (7) categories based on their estimated earnings per live performance rate. Income ranges for each category were informed by information provided by researchers from one of the leading Jamaican Booking Agencies and corroborated by other knowledgeable industry stakeholders as well as information available online. The seven categories, which are broken down into ranges are shown in the table below. In estimating the earnings of artistes, the mid-point of the ranges is used, except for Category 1 for which US$70,000 is used.

Experts noted that an artiste's estimated earnings per live show is determined by factors including:

- Reputation
- Popularity of songs
- Streams
- Viewership that videos are getting
- Amount of music out in the market
- Size of social media
- What other artiste's considered to be in the same Category are earning
- Aggressiveness of artiste
- Personality and idiosyncracies of the artiste

Figure 1: Factors that affect Live Show Earnings

Figure 2: Artistes Estimated Earnings Per Live Show by Category

Category	Earnings per Show Range (US$)
1	US$70,000 & over
2	US$35,000 - $70,000
3	US$20,000 - $35,000
4	US$10,000 - $20,000
5	US$5,000 - $10,000
6	US$2000 - $5000
7	US$1 - $2000

2. Artistes were each also categorized by their estimated average number of shows per year based on research conducted on A-Z's behalf by one of Jamaica's Leading Booking Agencies. The categories are shown below.

Figure 3: Artistes Estimated Number of Live Shows Per Year by Category

Category	Average # Shows per year
A	0 – 10
B	10 – 30
C	30 – 60
D	60 – 100
E	Over 100

3. A database/spreadsheet was developed containing information on Artistes/practitioners, Bands/Groups, Distributors, Online Distributors, Managers, Booking Agents, Mixing Engineers, Producers/Record Labels, Sound Systems/DeeJays, Recording Studios, IP Publishers, Promoters, Event Management Companies, Musicians, etc.

Applying the Data in the Spreadsheet/Database

- The information in the database/spreadsheet provides information on estimated **average** income/expenditure by artistes and groups/bands for each category identified in 2 above.

- The information in the database/spreadsheet also provides information on the Music Industry value chains, which A-Z has collected from online sources as well as from key players in the industry.

- Total income/expenditure is estimated using the information on the number of live performances and the estimated earnings per show.

- Assumptions will be made about indirect and induced effects of total earnings on the economy. Obtaining appropriate multiplier estimates for Jamaica is a major challenge given that STATIN has not updated its input-output tables since 2007 and no other Jamaican organization has estimates of multipliers.

5.3.5 Estimating the Aggregate Earnings of Jamaican **Artistes and Groups and Bands**

The table below shows the overall number of male artistes, female artistes, Gospel Artistes, and Bands/Groups in our database/spreadsheet and how they have been classified in the various categories. The table shows that about 11 artistes (3%) are in Category 1. Category 5 is the modal category with an estimated 51% of artistes falling into that category where they earn an average of about US$7,500 per live performance.

Table 45:Overall Number of Artistes and Bands in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Number	%
1	US$70,000 & over	11	3%
2	US$35,000 - $70,000	18	4%
3	US$20,000 - $35,000	31	7%
4	US$10,000 - $20,000	52	12%
5	US$5,000 - $10,000	221	51%
6	US$2000 - $5000	85	20%
7	US$1 - $2000	14	3%
TOTAL		**432**	**100%**

The table below shows estimated annual earnings for live shows for each category. This is obtained by multiplying the estimated number of live "gigs"/performances per year by the earnings per show for each category. It can be seen that Category 1, though representing only 3% of artistes, is estimated to account for 33% of the earnings of all artistes. This is not unexpected given that there are certain artistes that could be considered "mega artistes" and are able to command over US$100,000 per "gig".

The table below shows that the estimated total earnings from the Artistes and Bands/Groups is US$185,575,000 which amounts to about JMD 27 Billion using an Exchange Rate of USD1=145JMD.

Table : Total Annual Earnings of Artistes and Bands in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Earnings US$	%
1	US$70,000 & over	60,900,000	33%
2	US$35,000 - $70,000	44,625,000	24%
3	US$20,000 - $35,000	32,587,500	18%
4	US$10,000 - $20,000	23,400,000	13%
5	US$5,000 - $10,000	22,050,000	12%
6	US$2000 - $5000	1,942,500	1%
7	US$1 - $2000	70,000	0.04%
TOTAL		**185,575,000**	100%

The table below corroborates what was reflected in the previous table by showing the expected pre-pandemic average annual earnings of artistes in each category. It suggests that the average earnings of Category 1 is US$5.5 million. The average annual earnings decline for each category as one moves from Category 1 to Category 7. The overall average earnings of all artistes is estimated to be US$429,572. However, it should be noted that this average is significantly augmented by the high earnings of those in the higher earning categories. It should be noted that in Category 5 (the Modal Category), the average annual earnings is just below US$100,000 per year. The pre-pandemic median earning per year from live shows also falls in Category 5.

Table 46: Average Annual Earnings of Artistes and Groups in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Average Earnings (US$)
1	US$70,000 & over	5,536,364
2	US$35,000 - $70,000	2,479,167
3	US$20,000 - $35,000	1,051,210
4	US$10,000 - $20,000	450,000
5	US$5,000 - $10,000	99,774
6	US$2000 - $5000	22,853
7	US$1 - $2000	5,000
Overall Average		**429,572**

5.3.6 Male Artistes – Estimated Numbers, Distribution Across Categories and Estimated Earnings

The following five (5) tables present the same type of analysis as was carried out above, except it is segmented to reflect only the status of Male Artistes.

Number of Male Artistes in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Number	%
1	US$70,000 & over	11	4%
2	US$35,000 - $70,000	14	5%
3	US$20,000 - $35,000	25	9%
4	US$10,000 - $20,000	36	13%
5	US$5,000 - $10,000	145	54%
6	US$2000 - $5000	30	11%
7	US$1 - $2000	8	3%
TOTAL		269	100%

The adjacent table shows that there are currently 269 males in the database and how they are distributed across categories.

It can be seen that there are 11 (4%) in Category 1 which means that all of the Category 1 artistes in our database are male.

Category 5 is the Modal Category with 54% of male artistes

Table : Total Earnings of Male Artistes in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Total Earnings (US$)	%
1	US$70,000 & over	60,900,000	39%
2	US$35,000 - $70,000	36,750,000	24%
3	US$20,000 - $35,000	24,887,500	16%
4	US$10,000 - $20,000	15,975,000	10%
5	US$5,000 - $10,000	14,850,000	10%
6	US$2000 - $5000	787,500	1%
7	US$1 - $2000	40,000	0.03%
TOTAL		**154,190,000**	100%

The adjacent table shows that Male Artistes earn a total of US$154,190 per year from live shows which amounts to 83% of the total earnings of US$185,575,000 **shown earlier.**

Category 1 males in the database earn 39% of male artiste earnings.

It can be seen that the 11 persons in Category 1 account for 39% of estimated earnings.

Category 5 which is the Modal Category only accounts for 10% of the estimated earnings.

Table : Average Earnings of Male Artistes in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Average Earnings
1	US$70,000 & over	5,536,364
2	US$35,000 - $70,000	2,625,000
3	US$20,000 - $35,000	995,500
4	US$10,000 - $20,000	443,750
5	US$5,000 - $10,000	102,414
6	US$2000 - $5000	26,250
7	US$1 - $2000	5,000
Overall Average		**573,197**

Table : Number of Male Artistes in Each Category of Number of Live Shows Per Year

Category	**Average # Shows per year**	**Number**	%
A	0 - 10	114	42%
B	10 - 30	97	36%
C	30 - 60	43	16%
D	60 - 100	8	3%
E	Over 100	7	3%
TOTAL		**269**	100%

The adjacent table shows that 42% of male artistes have 0-10 live shows per year and 36% have between 10-30 live shows.

Female Artistes – Estimated Numbers, Distribution Across Categories and Estimated Earnings

Table : Number of Female Artistes in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	**Number**	**%**
1	US$70,000 & over	-	-
2	US$35,000 - $70,000	3	4%
3	US$20,000 - $35,000	3	4%
4	US$10,000 - $20,000	7	9%
5	US$5,000 - $10,000	38	50%
6	US$2000 - $5000	21	28%
7	US$1 - $2000	4	5%
TOTAL		76	100%

The adjacent table shows that there are no female artistes in Category 1.

Category 5 is the Modal category with 50% of female artiste falling in this category.

Table : Earnings of Female Artistes in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Total Earnings (US$)	
1	US$70,000 & over	-	-
2	US$35,000 - $70,000	3,675,000	22%
3	US$20,000 - $35,000	4,675,000	28%
4	US$10,000 - $20,000	3,975,000	23%
5	US$5,000 - $10,000	4,087,500	24%
6	US$2000 - $5000	525,000	3%
7	US$1 - $2000	20,000	0.001%
TOTAL		**16,957,500**	100%

The adjacent table shows that the total earnings of female artistes are more evenly distributed across categories than their male counterparts.

However, it shows that the relatively few persons in Categories 2 and 3 earn as much as the much greater number in Categories 5

Table : Average of Female Artistes in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Average Earnings (US$)
1	US$70,000 & over	-
2	US$35,000 - $70,000	1,225,000
3	US$20,000 - $35,000	1,558,333
4	US$10,000 - $20,000	567,857
5	US$5,000 - $10,000	107,566
6	US$2000 - $5000	25,000
7	US$1 - $2000	5,000
TOTAL		**223,125**

The adjacent table shows that the overall earnings of female artistes is an average of US$223,125 per annum compared to US$ **429,572** for their male counterparts.

Table : Number of Female Artistes in Each Category of Number of Live Shows Per Year

Category	**Average # Shows per year**	**Number**	**%**
A	0 - 10	39	51%
B	10 - 30	27	36%
C	30 - 60	9	12%
D	60 - 100	1	1%
E	Over 100	-	0%
TOTAL		76	100%

The adjacent table shows that over 50% of female artistes have 10 or less shows per year.

36% of females have between 10-30 live shows.

Gospel Artistes – Estimated Numbers, Distribution Across Categories and Estimated Earnings

Table : Number of Gospel Artistes in Each Category of Estimated Earnings Per Live Show

Category	Earnings per Show Range (US$)	Number	%
1	US$70,000 & over	-	-
2	US$35,000 - $70,000	-	-
3	US$20,000 - $35,000	2	4%
4	US$10,000 - $20,000	4	7%
5	US$5,000 - $10,000	21	39%
6	US$2000 - $5000	26	48%
7	US$1 - $2000	1	2%
TOTAL		**54**	100%

The adjacent table shows that of the 54 Gospel Artistes, none are in Categories 1 and 2.

Most are in Categories 5 and 6 which shows that they earn relatively less than their non-Gospel counterparts.

Table : Earnings of Gospel Artistes in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Earnings (US$)	%
1	US$70,000 & over	-	
2	US$35,000 - $70,000	-	
3	US$20,000 - $35,000	1,787,500	35%
4	US$10,000 - $20,000	1,200,000	23%
5	US$5,000 - $10,000	1,687,500	33%
6	US$2000 - $5000	455,000	9%
7	US$1 - $2000	5,000	0%
TOTAL		**5,135,000**	100%

The table shows that the overall earnings from Gospel Artistes is US$5,135,000, which is about the same amount as the average Male Artiste in Category 1.

The table reflects that the 11% of artistes in Categories 3 and 4 earn about 58% of estimated total earnings.

Table : Number of Gospel Artistes in Each Category of Number of Live Shows Per Year

Category	**Average # Shows per year**	
A	0 - 10	40
B	10 - 30	13
C	30 - 60	1
D	60 - 100	-
E	Over 100	-
TOTAL		**54**

Bands/Groups – Estimate Numbers, Distribution Across Categories and Estimated Earnings

Table : Number of Bands/Groups in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	**Number**	**%**
1	US$70,000 & over	-	0%
2	US$35,000 - $70,000	1	3%
3	US$20,000 - $35,000	1	3%
4	US$10,000 - $20,000	5	15%
5	US$5,000 - $10,000	17	52%
6	US$2000 - $5000	8	24%
7	US$1 - $2000	1	3%
TOTAL		**33**	100%

Table : Earnings of Bands/Groups in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Total Earnings	%
1	US$70,000 & over		
2	US$35,000 - $70,000	4,200,000	45%
3	US$20,000 - $35,000	1,237,500	13%
4	US$10,000 - $20,000	2,250,000	24%
5	US$5,000 - $10,000	1,425,000	15%
6	US$2000 - $5000	175,000	2%
7	US$1 - $2000	5,000	0005%
TOTAL		**9,292,500**	100%

The adjacent table shows that despite there being only two (2) Bands/Groups in Categories 2 and 3, they earn 58% of the estimated US$9,292,500 in earnings.

Table : Average Earnings of Bands/Groups in Each Category of Estimated Earnings Per Live Show

Category	**Earnings per Show Range (US$)**	Average Earnings
1	US$70,000 & over	
2	US$35,000 - $70,000	4,200,000
3	US$20,000 - $35,000	1,237,500
4	US$10,000 - $20,000	450,000
5	US$5,000 - $10,000	83,824
6	US$2000 - $5000	21,875
7	US$1 - $2000	5,000
TOTAL		**281,591**

The adjacent table shows that the overall average earnings for Bands/ Groups is about US$281,591. The average in Category 5, which is the Modal Category is US$83,824.

Table : Number of Bands/Groups in Each Category of Number of Live Shows Per Year

Category	**Average # Shows per year**	**Count**
A	0 - 10	18
B	10 - 30	11
C	30 - 60	3
D	60 - 100	1
E	Over 100	
TOTAL		33

Estimating Indirect and Induced Impacts of the Earnings from Jamaican Artistes

To date in this analysis, we have estimated the value of direct earnings from Jamaican Artistes. This accounts for what they are estimated to earn but does not account for where these earnings are banked or spent. In discussions with Music Industry experts, it was estimated that artistes in higher earning categories typically earned most of their income from tours overseas. In fact, as reflected in the above table, it was felt that there is a direct correlation between Category of Artiste and Percentage of Income Earned Overseas.

Category of Artiste (Per show)	% Earnings Overseas versus Local
1=US$70,000 & over	Category 1: 95 - 100 % of income earned overseas
2=US$35,000 - $70,000	Category 2: 80 - 95% income earned overseas
3=US$20,000 - $35,000	Category 3: 70 - 80% income earned overseas
4=US$10,000 - $20,000	Category 4: 50 - 70% income earned overseas
5=US$5,000 - $10,000	Category 5: 30-60% income earned overseas
6=US$2000 - $5000	Category 6: 20 - 40% income earned overseas
7=US$0 - $2000	Category 7: 0 - 20% income earned overseas

Some Jamaican artistes live overseas and therefore will choose to leave much of what they earn in accounts overseas. To the extent that these funds do not return to the Jamaican economy, or they are not used to purchase capital and other goods to send to Jamaica, there will be no resulting impact on the economy. There is so much diversity amongst artistes that it would be very difficult to estimate the percentage of their earnings used in the Jamaican economy.

An interesting irony is that a mega artiste who spends all or most of their earnings overseas may contribute less directly to the Jamaican economy than artistes in much lower earning categories who earn more of their income locally and spend most of their income locally.

However, in this analysis, it is assumed that the indirect benefits conferred on the Jamaican economy by these artistes offset the leakages resulting from earnings not being utilized in the Jamaican economy. These indirect benefits include:

- **Building of brand Jamaica** given the way they build the image of Jamaica and create a desire for foreigners and overseas residents to visit Jamaica and consume Jamaican goods and services, which have a positive impact on the economy
- **Marketing benefits** conferred on Jamaica every time they perform overseas
- **Marketing benefits** conferred on Jamaica every time their shows are promoted overseas
- **“Ride on the wave” impact** due to the promotion of Jamaican music and culture thereby creating more opportunities for other artistes**.**

Indirect Contribution of the Music Industry by Artistes

Indirect contribution is considered to be those expenditures in the Music Industry for goods and services related to generating the direct earnings such as management, booking agents, producers, recording studio time, (including costs of operating home studio, tools and equipment, etc.). These expenditures are not trivial because they represent the foundation on which consistently great performances are built.

In absence of multipliers and factors, it is assumed that for every dollar that is earned by artistes, they **generate** an additional 50% of that amount in terms of goods and services purchased within the music industry. Given that it was estimated earlier that **about JMD 27 Billion** is earned directly by artistes, then it is estimated that a further **JMD 13.5 Billion can be attributable to indirect expenditure contributions.**

Induced Expenditure by Artistes

Apart from expenditures within the Music Industry, the expenditures by artistes induce expenditures elsewhere in the economy such as supermarket and other retail outlets, gas stations, payment for school fees, medical expenses, transportation and communications, security, janitorial services, etc.

It is assumed that a further 50% of direct earnings will represent induced expenditures. These **expenditures would therefore amount to JMD 13.5 Billion**.

Indirect and Induced Expenditures by Live Shows

There are also induced expenditures that arise from different local performances by Artistes at festivals and other local events that occur on a regular basis all over the island. There are a multiplicity of events, however some notable events include:

1. Reggae Sumfest
2. Independence weekend – Dream weekend
3. Rebel Salute
4. Unruly Fest
5. Shaggy and Friends
6. Reggae Marathon and other Marathons/Runs
7. Accompong Maroon Festival
8. Bob Marley's Birthday Bash
9. Saint Ann Kite Festival
10. Jamaica's Carnival (Bacchanal)
11. Montego Bay Yacht Club Easter Regatta
12. Ocho Rios Jazz Festival

In addition to the above there are numerous shows put on by artistes for their birthdays, Christmas, New Year, Independence, etc. There are also events put on by large corporate players such as Sagicor.

The following assumptions are made with respect to the number of live shows in Jamaica during pre-pandemic times

- One (1) show per year which attracts approximately 30,000 patrons
- Three (3) shows per year which attract approximately 10,000 patrons each
- 10 shows per year with an audience of 5,000 each
- 20 shows per year with an audience of 2,000 each

- 40 shows per year with an audience of 1,000 each
- 50 shows per year with an audience of 500 each

Estimated Indirect Expenditure from Live Shows with Artistes

Indirect expenditure are those associated with patrons attending live shows. It is well known that live shows stimulates expenditure on hair, nails, make-up, clothing (informed persons explained that many persons do not wear outfits previously worn), transportation, accommodation, communication, food and drink, confectionary, etc. There are also inflows of foreign exchange to support these expenditures.

#Patrons	#Shows	Expenditure /Patron JMD	Total Expenditure (JMD)
30,000	1	20,000	600,000,000
10,000	3	5,000	150,000,000
5,000	10	**5,000**	250,000,000
2,000	20	4,000	160,000,000
1,000	50	3,000	150,000,000
500	150	2,500	187,500,000
Total	**234**		**1,497,500,000**

These expenditures by patrons also have an induced (multiplier) effect on the general economy as those who receive payments for goods and services (e.g. hairdressers, barbers, nail technicians, etc.) spend the money they earn in the general economy. It is estimated that this will have a further effect of 1.5 times the indirect effect, which amounts to
JMD 1,497,500,00*1.5 = JMD 2,246,250,000

The estimated overall impact from the Music Industry is summarized in the following table.

Estimated overall impact Performance of Artistes in the Music Industry

Source of Contribution	Billion JMD
Direct Earnings from Live Performance	26.90
Indirect Expenditure from artistes expenditure on industry	13.45
Induced Expenditure from artistes spending	13.55
Indirect expenditure from local live performances	1.50
Induced expenditure from local live performances	2.25
Total	**57.65**

Deejays and Sound Systems in Jamaica

According to key stakeholders in the Sound System business, there are estimated to be around 3,000 sound systems in Jamaica. However, to be considered a major sound system means that it must contain at least three columns of boxes. Most sound systems only have two columns or less. If one drives around Jamaica one can often see stacks of speakers in various locations. There are many Sound Systems in Kingston Metropolitan Area, the North Coast, and many rural towns where they are used for dances and parties especially on weekends. Our internet search identified over 140 sounds Systems distributed across all Parishes (See Appendix).

Parish	# Sound Systems
Kingston & St. Andrew	34
St. Catherine	13
Montego Bay	20
St. Elizabeth	9
Clarendon	8
Manchester	9
Hanover	5
Trelawny	6
St. Mary	3
St. Ann	6
St. Thomas	2
Westmoreland	4
Portland	2
Parish unknown	22
Total	143

A major brand sound system (which we call Tier 1) can charge as much as JMD100,000 per session. There are estimated to be about 20 Tier 1 sound systems in Jamaica. A Tier 1 Sound System employs a crew of about 14 persons with a variety of skills. Based on an interview with a leader in the industry (who owns more than one Sound System), the table below shows the typical range of staff required to operate a Sound System at an event.

However, it was also noted that the structure of the industry is changing with some corporate mega sounds, backed by large investors and production houses, entering the industry. These are tax compliant and operate in the formal sector and are now "taking over" major events.

Employment Related to Sound Systems

Category of Staff	Number	Cost per person (JMD per session)	Total Cost (JMD Per Session)
Owner	1	$30,000	$30,000
Booking Managers	1	$6,500	$6,500
Road Manager	1	$6500	$6,500
Selectors (each for different types of music)	4	$4,000	$16,000
Maintenance Persons	4	$2,000	$8,000
String men	2	$4,000	$8,000
Truck with driver	1	$25,000	$25,000

Total	**14**		**$100,000**

If we assume that there are 300 active Sound Systems in Jamaica (10% of what the industry leaders suggest and twice as many has our preliminary research has found) and categorize them into Four Tiers, we could conservatively estimate the number of staff as shown in the following table.

Estimated Number of Active Sound Systems and Total Staff/Workers

Tier	Number of Sound Systems	Typical Number of Staff per Sound System in Each Tier	Total Staff
1	20	14	280
2	50	8	400
3	80	4	320
4	150	3	450
Total	**300**		**1,450**

As can be seen, in pre-COVID-19 periods, it is estimated that there are about 1,450 persons employed on sound systems.

Stakeholders in the Sound System Business feel that that they do not receive good treatment from the society and are seen as a nuisance factor. Given that the Sound System business does not have a lobby group representing them is considered a major limitation. They complain that legal and other issues related to noise abatement has impacted them adversely.

Estimating the Direct Contribution of Sound Systems in Pre-Pandemic Years

Direct Earnings/Contribution of Sound Systems

If we assume that during pre-pandemic times (e.g. 2019) each Tier of Sound Systems earned per session as follows, it could therefore be estimated that if all Sound systems were performing on a particular day, then the total direct earnings across the island would be $15 million, as shown in the table below.

Tier	Number of Sound Systems	Earnings by Sound System per Session (JMD)	Total Earnings per Tier (JMD)
1	20	100,000	2,000,000
2	50	75,000	3,750,000
3	80	50,000	4,000,000
4	150	35,000	5,250,000
Total	**300**	**50,000**	**15,000,000**

Assuming that each Tier of Sound System performs on average the number of sessions per year as shown in the Table below then we could estimate the total direct earnings from the Sound System industry for the year as shown in the following table.

Direct Contribution/Earnings of Sound Systems per Year

Tier	Number Systems	Earnings per Session (JMD)	Overall Earnings per Session (JMD)	#Sessions per Year	Overall Annual Earnings (JMD)
1	20	100,000	2,000,000	100	200,000,000
2	50	75,000	3,750,000	75	281,250,000
3	80	50,000	4,000,000	50	200,000,000
4	150	35,000	5,250,000	30	157,500,000
Total	**300**	**50,000**	**15,000,000**	**255**	**838,750,000**

Indirect Contribution of DJs and Sound Systems

Assuming that the average size of crowd and the average expenditure per patron at each event is as shown in the following table, then the total attendees and total expenditure can be estimated as shown in the following table. There is also expenditure on promoting events.

Indirect Expenditure at Shows by DJs and Sound Systems

Tier	**Number Systems**	**Average #Patrons at each session**	Total # Patrons per Day	**Spending per Patron** at each **Session (JMD)**	**#Sessions per Year**	**Overall Annual Expenditure (JMD)**
1	20	1,000	20,000	2000	100	4,000,000,000
2	50	750	37,500	1500	75	4,218,750,000
3	80	500	40,000	1000	50	2,000,000,000
4	150	300	45,000	750	30	1,012,500,000
Total			**142,500**		**255**	**11,231,250,000**

Indirect Expenditure before Shows Related to DJs and Sound System Events

It is assumed that each patron is induced to spend on average the same amount for clothes, haircuts/styles, make-up, transportation, confectionery, credit for phones in preparation for a session, as they do at the show. In other words Indirect Expenditure = Induced Expenditure.

Given this conservative assumption, the table below shows how much expenditure is induced as a result of sound systems.

Indirect Expenditure Before Due to DJs and Sound System Events

Tier	Number Systems	Average #Patrons at each session	Other Spending per Patron induced by Session (JMD)	#Sessions per Year	Overall Annual Expenditure (JMD)
1	20	1,000	2000	100	4,000,000,000
2	50	750	1500	100	4,218,750,000
3	80	500	1000	80	2,000,000,000
4	150	300	750	50	1,012,500,000
Total					11,231,250,000

These expenditures by patrons also have an induced (multiplier) effect on the general economy as those who receive payments for goods and services (e.g. hairdressers, barbers, nail technicians, etc.) spend the money they earn in the general economy. It is estimated that this will have a further effect of 1.5 times the indirect effect = 11,231,250,000 *1.5 =
JMD 16,846,875,000.

Based on the above analysis, it is estimated that Sound Systems contribute to the economy each year as follows:

Type of Contribution	**Contribution**
• Direct Contribution (Earnings) for Sound Systems per year	JMD 838.75 Million
• Indirect Expenditure by Patrons at Shows	JMD 11.231 Billion
• Indirect Expenditure by Patrons Before Shows	JMD 11.231 Billion
• Induced expenditure	JMD 16,846 Billion
TOTAL IMPACT	**JMD 40.15 Billion**
• Contribution to exports (assuming that 5% of those who participate in shows are from overseas) = JMD (14.512 +14.512)*0.05	JMD1.965 Billion
• Contribution in terms of Direct employment	1,450

Other Players In the Music Value Chain

There are other players in the Music Value Chain including

- Managers
- Booking Agents
- Producers
- Studios

Managers
According to industry informants, most artistes do not have managers. However, those that have managers typically pay them directly from their earnings. It is estimated that this amount is usually around 5-10% of earnings. It would therefore be double counting to count these payments again since they were captured under the artiste's earnings. Of course this assumes that multipliers for spending by Managers are similar to those made by Artistes, which is unlikely to be true but should not make a significant difference.

Booking Agents
According to experts in the industry, Booking Agents usually earn about 10% of the artistes' fees. However, like in the case for Managers, this amount would have been captured in the Artistes earnings.

Producers
Producers would also be treated the same as Booking agents.

Studios
Experts in the field explained that Studios nowadays make relatively little from artistes because nearly everyone has a studio in their homes, office, personal space, etc. The expenditure on Studios would be captured in the indirect expenditure of Artistes.

Summary of Perspectives from a Leading Studio Owner

- 90% of stuff produced these days is done in small studies.
- Most musicians have their own studios
- Work can be given and done remotely e.g. if a bass line is needed the work can be sent to the bass player and he/she completes it remotely
- There are two categories of studios: a} those at which you can do live recordings, probably about 10 or so in Jamaica, where you can have a band set up in a traditional booth and b) those in the digital space where people can use drum machines etc.
- In recent times studios are no longer significant income earners
- Studios cost too much to build so not a viable rental option. Someone could book two (2) or three (3) hours for a live production and put down a live drum but usually the bulk of the work which is overdub is done at home or elsewhere

- Living room or spare bedroom studios are used for production and this is included as value added when doing your calculations, just like an office for people who work from home, but you don't rent to outsiders
- Availability of qualified engineers is a major issue. Many untrained people present themselves as engineers
- Training needs to be provided, maybe at the university, at remedial or introductory level paving the way on a career path
- Reggae and dance hall songs are being put out overseas in countries like Africa, China, Japan so if we have 50 or so well-trained mixing engineers we would be in a good position.
- The music eco-system is not supportive of the young people- it's not bringing them enough money and sometimes people don't pay them for work done
- Quality assurance system is lacking - some reggae and dance hall music on YouTube can be very good while some should not have been made available to the public
- Absence of technical support is a major problem.

Intellectual Property (IP) Earnings from Music

Persons involved in the Music (Creative) Industries earn royalties for their work. In speaking to Collective Management Organizations in Jamaica, it was clear that some artistes earn a significant amount from IP.

As discussed in Chapter 3 and outlined in the Economic and Social Survey of Jamaica 2020 (ESSJ 2020), collective management is the exercise of copyright and related rights by organizations acting in the interest and on behalf of the owners of rights. The two most relevant to the Music Industry are JACAP and JAMMS.

- JACAP was established in March 1998 to oversee the collective administration of music copyright in Jamaica, and administer rights on behalf of songwriters, composers and publishers.
- JAMMS' primary objectives are to administer rights on behalf of record companies and record producers who own the copyright in recorded music and to ensure that all music users engaged in playing music publicly or broadcasting music are duly authorized by obtaining the relevant Licence/Permit.

The Jamaica Association of Composers, Authors and Publishers (JACAP)

The ESSJ (2020) presents figures on disbursements from royalties collected by the Jamaica Association of Composers, Authors and Publishers (JACAP) on behalf of its members, which was JMD 156.1 million in 2019. Net Overseas royalties collected by JACAP was JMD 19.7 million.

From discussions with JACAP and other stakeholders, the Consultants understand that the following situation reflects what takes place:

- Approximately 40% of the JMD 156.1 stays in Jamaica and is paid out to Jamaican songwriters, composers and publishers. This is equal to about JMD59 million after JACAP takes fees of about 5%.
- The remaining 60% less JACAP's 5% fees is sent to CMOs overseas to CMOs such as PRS or BMI, which JACAP collected on their behalf. This amounts to about JMD 89 million
- Some of Jamaica's main songwriters, composers and publisher are also registered with these overseas CMOs (e.g. registered with PRS), it is estimated that about 30% of what is sent overseas to PRS, DMI and other CMOs, is actually paid to Jamaican artistes and thereby returns to Jamaica. This amounts to about JMD 27 million.
- The total royalties for Jamaican songwriters, composers, and publishers from funds passing through JACAP would amount to about JMD 59 Million + JMD 27 Million+ 19.7 Million = JMD 106 Million.
- It is assumed that Jamaican songwriters, composers and publishers earn about the same again from CMOs from all over the world when their music is played in other countries. This would amount to another JMD 106 Million.

Jamaica Music Society (JAMMS)

Gross income received by JAMMS in 2019 was JMD140.7 million, which was collected on behalf of Jamaican record companies and record producers who own the copyright in recorded music . The amount collected can be broken down into three income categories as follows:
— Broadcasting, Webcasting & Cable Income JMD 81.5 million
— Public Performance Income of JMD49.6 million
— Other Income (Foreign Royalties of JMD$9.6 million.

It was assumed that **JMD 100 Million** of this amount collected by JAMMS would accrue to Jamaicans.

Induced Expenditure from Royalties

The total estimated earnings from Royalties amounts to JMD (105.7+105.7+100) = 311 Million. It was assumed that the Royalties earned by Jamaicans would lead to a further induced expenditure of 1.5 times the amount. **This amounts to JMD 467,133,300.**

Summary of Economic Impact of FAM Industries in Relation to GDP

The table below summarizes the overall direct contribution, indirect contribution, and induced expenditure of the Film, Animation and Music Industries to the Jamaican economy. It also compares them to GDP at Market prices for 2019. It can be seen that

- The Film industry is estimated to have an overall impact equal to **1.33% of GDP**
- The Animation industry is estimated to have an overall impact equal to **0.08% of GDP**
- The Music industry is estimated to have an overall impact equal to **4.68% of GDP**

Sources of Contribution	JMD	% GDP
Total Contribution of Film Industry	**28,045,623,342**	**1.33%**
Direct Contribution	9,348,541,114	
Indirect Contribution	4,674,270,557	
Induced Contribution	14,022,811,671	
Total Contribution of Animation Industry	**1,787,415,000**	**0.08%**
Direct Contribution	1,021,380,000	
Indirect Contribution	255,345,000	
Induced Contribution	510,690,000	
Total Contribution of the Music Industry	**98,670,053,000**	**4.68%**
Direct Contribution of Male Artiste	*22,357,550,000*	
Direct Contribution of Female Artiste	*2,458,837,500*	
Direct contribution of Gospel Artiste	*744,575,000*	
Direct Contribution of Bands/Groups	*1,347,412,500*	
Total Direct Contribution	26,908,375,000	
Total Indirect Contribution due to expenditure by Artistes	13,454,187,500	
Total Induced Contribution due to expenditure by Artistes	13,454,187,500	
Indirect Contribution from live shows by artistes	1,497,500,000	
Induced Contribution from Live shows by artistes	2,246,250,000	
Direct Contribution (earnings) of DJs and Sounds Systems	838,750,000	
Indirect Expenditure at Shows by DJs and Sound Systems	11,231,250,000	
Indirect Expenditure before Events by DJs and Sound System	11,231,250,000	
Induced Expenditure Due to DJs and Sound System Events	16,846,875,000	
Estimated Earnings to Jamaicans from JACAP, JAMMS and other CMOs	311,422,200	
Induced expenditure effects from Royalties collected	467,133,300	
GDP (at Market Prices 2019)	**2,110,433,000,000**	

Contribution of Economic Sectors to GDP

Sector	2019 Million	% GDP	Compared to FAM
Agriculture Forestry & Fishing	148,144	7.0%	FAM Slightly below
Mining & Quarrying	37,734	1.8%	FAM well above
Manufacture	163,315	7.7%	FAM Slightly below
Electricity & Water Supply	61,185	2.9%	FAM well above
Construction	144,100	6.8%	FAM Slightly below
Wholesale & Retail Trade; Repairs; Installation of Machinery & Equipment	330,623	15.7%	FAM well below
Hotels & Restaurants	84,159	4.0%	FAM well above
Transport Storage & Communication	137,151	6.5%	FAM Slightly below
Finance & Insurance Services	189,821	9.0%	FAM well below
Real Estate Renting & Business Activities	187,065	8.9%	FAM well below
Producers of Government Services	220,728	10.5%	FAM well below
Other Services	112,721	5.3%	FAM slightly above
Less Financial Intermediation Services Indirectly Measured (FISIM)	102,234	4.8%	
TOTAL GROSS VALUE ADDED AT BASIC PRICES	1,714,513	81.2%	
Taxes Less Subsidies on Products	395,919	18.8%	
GROSS DOMESTIC PRODUCT AT MARKET PRICES	2,110,433	100.0%	

Source: Statistical Institute of Jamaica 2020

The above table shows the contribution of different economic sectors to Jamaican GDP. Given that the overall contribution of Film, Animation and Music to GDP is estimated to be 6.08%, it can be seen that FAM contributes more to GDP than:

- Mining and Quarrying which contributes 1.8%
- Electricity &Water Supply which contributes 2.9%
- Hotels & Restaurants which contributes 4.0%
- Other Services which contributes 5.3%

FAM contributes slightly less to GDP than

- Construction which contributes 6.8%
- Transport Storage & Communication 6.8%
- Agriculture Forestry & Fishing which contributes 7.0%
- Manufacture which contributes 7.7%.

The above shows that FAM Industries contribute a significant amount to GDP and contribute more than several important sectors and close to several others.

Appendix: 1 Sound Systems in Jamaica

KINGSTON	ST. JAMES MONTEGO BAY	ST. CATHERINE	ST. ELIZABETH	MANCHESTER	CLARENDON	ST.ANN OCHO RIOS
1. Alternative Music	1. Atomic Force	1. Blaze International	1. Bredda Hype	1. Firerama	1. AudioTek	1. Bass Odyssey
2. Black Scorpio Sound System	2. City West Sound	2. Chromatic	2. Hi Grade	2. King Harmony	2. Body Guard	2. Cinemax
3. Bloodline	3. Classique	3. Diamond Star Sound	3. Black Kat	3. Mega Star Movement	3. Black Champion	3. Hyperactive Sound System
4. Body Guard Sound System	4. Classquie	4. Silva Slick Int. Sound	4. Iceberg Million	4. Silver Force Sound	4. Goldstar Int.	4. Satisfaction
5. Code Red Sound System	5. Dexter Pepper	5. Haad Rokk Sound System	5. Reggae King Int.	5. Sir Vega United	5. Merkz	5. Turbo Max
6. Coppershot	6. DJ Kentucky	6. High Tension Sound System	6. Masanic Sound System	6. Starsquad	6. Renegade Sound Jamaica	6. Ovaproof Movement (Mini)
7. DJ Denvo	7. Electro Force	7. Mad Hype Sound System	7. lone star sound system-rosehall	7. Stonelove	7. Ruffcut	
8. DJ Nicco	8. Intoxicated Sound	8. 7 Covenant Sound	8. Tic Tac Mobile	8. Total eclipse sound	8. Top Secret	
9. DJ Richie Ras	9. Foreva Black Music	9. quantum sound system	9. White star Int.		9. Diamond Int. Sound System	
10. Fire Linkz	10. Killa force International	10. High Crises # 1 Sound System				**PARISH UNDETERMINED**
11. Jaggon Hype Sound System	11. Krazy Dawg	11. Stable rock sound system				1. Travellers
12. Jamrock	12. Madd Squad	12. Vybz Unit Sound System				2. ZJ Sparks
13. katarock sound system	13. Olympic Sound	13. Y2K Sound System				3. Spida Sound Katarock

14. Kilamanjaro	14. Pieces					4. Superkilen
15. King Jammys	15. Pure Playazz					5. DunRich World
16. Kurt Riley	16. Rock Star Sound					6. Dulcie's International
17. Liquid	17. Sound Viper International	**HANOVER**	**TRELAWNY**	**ST. MARY**	**PORTLAND**	7. Extreme Sound Station
18. Main Event Entertainment Groups Ltd	18. Super Strong	1. Laseme	1. Blaque Diamond	1. Super Mix Unit	1. One Rock Sound	8. Echo One Sound System
19. Melody One	19. Ticka Muzik	2. Hype zone	2. I-Octane	2. Torpedo Sound System	2. Fire Squad Sound	9. Fargo
20. Metro Media	20. Tic Tac Mobile	3. Grenade	3. Romaine "Teflon" Arnett	3. Red Heat sound		10. Flavaz
21. Nikki Z		4. Blacc Widow	4. Screaming Target			11. Moneyranks Sounds
22. Phyl Force Sound		5. Black Blunt	6. Fire Zone Sound			12. Venom
23. Razz and Biggy the Hummer of Dancehall & Reggae						13. Xxstasy Sound
24. Renaissance		**WESTMORELAND**	**ST. THOMAS**			14. Stopless
25. Richie Feelings Dancehall Reggae Sound System		1. Black Kolaz Sound System	1. 5 Star General Sound			15. Sky Level Movements
26. Riddim Rider Sound System		2. Hot Skull mobile sound system	2. Studio 4 Sound			16. Slicatone
27. Sliver Hawk		3. Sharp Movements Sound System				17. Shadrock
28. Soulja Sindecut Sound System		4. street beat sound				18. Rockstar Int. Sound

29. Sound Trooper						19. Quart Bottle Movement
30. Skyy Disco						20. Music Master International Sound
31. Stone Love						21. Natural Vibes
32. Swatch Int.						22. Mystic Sound System
33. Third World Sound						23. Little Gego Sound System
34. Tony Matterhorn						24. Ghetto Rock Sounds

Appendix 2: Terms of Reference Film, Animation, and Music Economic Impact Study

1. Background

> *"The term cultural or creative industries describes the value chain of economic activities of creative enterprises and cultural entrepreneurs, for-profit as well as for not-for-profit, in the production, distribution and consumption of products related to multimedia/ film, advertising and communication services, music, theatre, dance, visual arts and crafts, new product design, festivals, cartoons/animation, textiles and fashion, (slow) food as well as other high value-added products which are agribusiness-based."*
>
> (*Creative industries for Youth: Unleashing Potential and Growth,* UNIDO Working Paper, 2013)

In 2015, international trade in creative goods was valued at US$510.0 billion. China accounted for the bulk of the trade (US$169.0 billion), followed by the United States and France which contributed US$41.0 billion and US$34.0 billion, respectively. Of note, eight of the twenty main exporters of creative goods were developing economies.[17] Despite the continued expansion of the global market, and Jamaica's unique offerings, local exports of creative goods and services have been underleveraged and export earnings from the creative and cultural industries remain under the US$100.0 million mark.[18]

Against this background, *The Consultancy for the Business Plan for the Creative Industries* was conducted March 2016. The study exposed the extreme dearth of current sector data. In many cases no baseline data was provided with which to measure success of the recommendations for implementation. The study further noted that although the global cultural and creative industries are a major growth sector, without accurate, consistently produced and continually updated data, the exact performance of the Jamaican Film, Animation, Music (FAM) sectors or their capacity to grow remains uncertain.

2. Objective(s): The Main Objectives of the Assignment

Jamaica Promotions Corporation (JAMPRO) is seeking to contract the services of a consultant with technical expertise in research and data analysis for the culture and creative industries to conduct an economic impact study for Jamaica's Film, Animation, and Music Industries (FAM).

This study is intended to (i) provide a comprehensive account of the practitioners in the FAM industries, (ii) quantify their contribution to those industries, and (iii) quantify the economic

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[17] United Nations Conference on Trade and Development (2018). International Trade in Creative Goods-2015. http://unctad.org/en/Pages/DITC/CreativeEconomy/Statistics-on-world-trade-in-creative-products.aspx

[18] UNCTAD (2012) estimates that Jamaica's export of Personal, cultural and recreation services were valued at US$54.0 million.

impact of Jamaica's FAM industries. The outcome of the study will guide the value chain development and the investment and export opportunities for promotion across the industries.

3. Required Content

The FAM Economic Impact Study is expected to:

- Complete a baseline study and economic impact assessment on the FAM industries to measure size, structure, economic (including, *inter alia,* contribution to GDP, market size, labour market contributions);
- Update existing maps of the local Film, Animation and Music Value Chains, identify, and where possible, align existing resources along the value chain;
- Expand the existing registry/database of practitioners (national registry of entertainment and CCI practitioners to include individuals involved in Film, Animation and Music);
- Provide a list of indices (and their benchmarks) for measuring film, animation, and music as an economic activity, including contribution to exports of services;
- Review current indices to assess the appropriateness of these indices for measuring the size and economic contributions of Jamaica's FAM industries;
- Identify appropriate, quantitative methodologies for measuring the economic contributions of Jamaica's FAM industries.

4. Scope of Work (Components)

The consultant is expected to provide a comprehensive baseline study on Jamaican Film, Animation, and Music Industries. This study will champion strategies for enhancing and positioning these sectors as key drivers of exports and investment. The consultant(s) is expected to:

- Undertake an economic impact assessment on the film, animation and music industries to measure size, structure and economic contribution;
- Quantify the current economic impact of Jamaica's FAM industries;
- Identify and quantify exports within Jamaica's creative industries pursuant to the modes of supply under Article I:2 of the General Agreement of Trade in Services;
- Update the value chain maps for film, animation and music industries based on study provided for review/ sign off;

- Ascertain and review qualitative and quantitative work that has already been done in this area and incorporate previous outcomes that may still be relevant based on consultations;
- Conduct primary and secondary research including meeting with key stakeholders to ascertain actions undertaken/planned, challenges/constraints and develop solutions for capturing and measuring economic contribution of FAM;
- Consult with private sector stakeholders and practitioners to identify bottlenecks and challenges, and chart possible solutions;
- Update existing an inventory/database of existing film, animation and resources along the value chain;
- Collect and collate information regarding industry personnel with the aim of expand the existing registry/database of practitioners;
- Create a quantitative index which can be used to forecast industry development within the medium-term and long-term;
- Be willing and available to attend required consultations in advance of first draft, then circulation to review/sign off.

5. Qualification Requirements for the Consultant

The ideal consultant for this project must possess the following minimum qualifications:

- A postgraduate degree in Economics, Statistics, Development Studies, or International Business or other relevant discipline, with an emphasis on cultural policy; arts management; innovation/technology, cultural enterprise management; cultural and creative industries development, or its equivalent;
- Deep knowledge of the components, challenges, and opportunities of Jamaica's creative economy sector, as related to other economic sectors;
- Over 10 years' experience in project management or management consulting conducting market analysis/research;
- Demonstrated experience designing and implementing research methodologies, data collection, data analysis, and comprehensive reporting on creative industries, arts/culture non-profits, and artists;
- Excellent communications skills;
- Excellent track record in working with persons across diverse cultural spectrums.

6. Reporting Requirements and Time Schedule for Deliverables

The consultant will report directly to JAMPRO for the stated deliverables through the Manager of JAMPRO's Research and Business Opportunities /Sector Development Team or the designated officer.

Final approval and acceptance of the output lies jointly with the Film, Animation and Music Sector Teams and the President of JAMPRO.

The intended start date is January 2019 and the project is to be executed over 20 weeks - excluding review periods. Given the length of the project, monthly one-page progress reports by email or meetings with JAMPRO representatives, will be required to keep the organization updated on the progress of the consultations/project. Payment will be made in keeping with submission and acceptance of the following deliverables within the stipulated timeframe.

Deliverables	**Content**	**Timeline**	**Review Period**
Inception Report (Electronic)	Work Plan: schedule of work and related output.	3 days following the inception meeting to discuss the study and the contract signing	5 business days
Stakeholder Consultations	Conduct primary and Secondary Research (Incl. meetings, travel)	No later than 12 weeks following acceptance of work plan	
1st Draft Report (Electronic)	Findings from consultant's consultations - incorporated with findings from preliminary consultations in a comprehensive economic impact study. This should include (a) results of the Baseline and Economic Impact	4 weeks following consultant's consultations	10 business days

	Studies (b) Value Chain Map (c) Resource Database		
Draft Final (Electronic) and Draft PowerPoint Presentation	Incorporation of all reviews from 1^{st} Draft Report	No later than 2 weeks following review of 1^{st} draft report	5 business days
Final Report Electronic Report and PowerPoint Presentation with three (3) printed copies upon sign off by JAMPRO	Amalgamation of all reviews to Draft final document and final PowerPoint	No later than one (1) week following review of Draft Final report and Presentation	5 business days

APPENDIX I

Flemming, 2016 notes that

> "Available data on the CCIs is very limited. [Where available] it is:
>
> - Incomplete: with no pan-CCIs baseline. Where data does exist, it focuses on specific sub-sectors (e.g. music or film), and specific parts of the value chain – e.g. 'copyright industries'. Plus, with business formalisation so low and proportionately lower still in the CCIs (given the preponderance of micro businesses and sole traders), tracking businesses and then extracting detailed performance-related information has been difficult.
> - Inaccurate: the current industrial and occupational classification system is unable to cater for the diversity of CCIs sub-sectors and to keep pace with them as they change. For example, it may not be possible with the current system to differentiate between a business that retails computer games and one that develops them.
> - Out of date: much of the data used is from before the financial crisis and prior to much of the transformation led by digital technology."

The following table presented in the business plan and their accompanying footnotes indicate the limitations of current sector data.

Est. # of businesses	Est. number of total employment	Est. GDP	Est. % Exports	Illustrative Available Data
Audiovisual (film, TV, including radio) At least 20 companies 300+ individual private contractors	0.52%	0.62%		In quantifying the economic contribution of copyright and related rights-based industries in Jamaica, data from **The Statistical Institute (STATIN)** revealed that in 2005, the Copyright sectors contributed J$29 billion or US$464.7 million or 4.8 % of GDP. The **STATIN 2005 Census report** and **The Economic Report for Copyright Based industries (2007)** positions the estimated percentage of total employed in the audiovisual Jamaican industry as 0.52% of total employed across the island. The Report also noted that there was a significant level of underemployment in the sector.
Music Estimated 200 record studios. Approximately 612,000 persons are directly employed in the music industry (Stanbury, 2003; Witter, 2004), while other reports estimate that the music industry employs about 15,000, and generates revenues of US$52.5 million.	0.41%	0.21%	1.7%	**Annual music exports of US$80-100 million, which amounts to about 1.7% of total goods and services exports**. Data on the employment of persons in musical performance is unavailable – it is a particularly informal sector. Dr. Michael Witter in his study indicated that industry sources estimate **anywhere between 75 and 200 sound recording studios if home facilities are included.** There are **at least 50 commercial sound recording studios in Jamaica e**ach employing a minimum of two technical persons on a full-time basis. Each home studio has a minimum of one technical person on a full-time basis, which suggests that there are no less technicians and engineers directly connected to music studios (Stanbury, 2006). Data from James' Report (2007) states that **24% of total workers' earnings were from self-employed individuals**. Additionally, the report noted that the educational level was low. The Report estimated that the typical self-employed worker averages 10.3 years of education. **It has been estimated that approximately 6,000 persons are employed in the music industry of Jamaica, of whom 2,500 are musicians 1,700 are employed by sound systems and 600 are studio performers.** These estimates pertain to professional performers including musicians.

Interactive media (including animation) 4 animation studios	5,392 temporary jobs along with 45 permanent jobs in animation	0.05%	-	A DBJ Report on Jamaica's Animation Industry (2013) stated **that since 2012 more than J$2.3 billion has been spent or committed by key stakeholders in the Animation Industry.** Efforts are geared towards growing the Animation Industry by providing training programmes, incubators and competitions through projects such as Digital Jam, KingstOON, Start-Up Jamaica and JM Youth Employment in Digital and CCIs. Data for other areas of interactive media are unavailable.