

WIPO-CARICOM EXPERTS MEETING ON THE CREATIVE INDUSTRIES AND INTELLECTUAL PROPERTY



Mapping the Creative Industries: The Experience of Jamaica

Lloyd Stanbury
Caribbean Music Expo Ltd./
Caribbeat Entertainment Ltd.
February 9, 2006



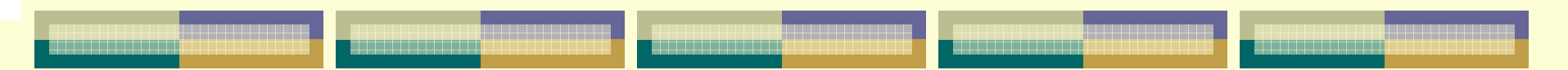
Presentation Outline

- Overview of Creative Sector in Jamaica
- Development Issues affecting the Sector
 - Training
 - Institutional infrastructure
 - Marketing
- Challenges in creative industry development
- Recommendations



Jamaican Creative Industries

- Music
- Film & Video
- Theatre
- Media
- Festivals
- Book Publishing
- Performing Arts



Participants & Segments

- Performers and primary creators
- Producers of media content
- Representatives and Support Personnel
- Not present: Manufacturers & distributors of AV devices, production equipment & musical instruments



Industry Size Estimates

- Performers – 4,000
 - Jamaica Federation of Musicians
 - Jamaica Assoc. of Dramatic Artists
 - Jamaica Assoc. of Female Artists
 - Jamaica Assoc. of Vintage Artists
 - Jamaica Songwriters Guild
 - Collective Management Associations (JACAP, JPAS, JAMCOPY)



Industry Size Estimates

- Film & Video Technical – 500
 - Jamaica Film & Video Producers Assoc.
 - Recording Industry Assoc. of Jamaica
 - Assoc. of Independent Programme Providers
- 200 recording studio technicians & engineers in 75-200 recording studios
- Entertainment distribution – 450
- CAPNET – includes 14 Jamaican publishers
- Event planning & mgt – 1,000



Industry Size Estimates

- Music Industry – 6,000 (Witter 2003)
- Creative industries – 15,000 (JAMPRO)
- Music industry earnings in 2000:
US\$60-100M
 - Sales - \$40-50M
 - Foreign Tours and Local Shows - \$20-25M
 - Not included: royalties due to songwriters & music publishers



Industry Contribution

- In 2000, gross revenues from entertainment-related activities were equivalent to 10% GDP (Witter & James)
- In 1997, entertainment was 3rd largest portion (10%) of 8 categories, of the total contribution of tourism to GDP, exceeded only by accommodation (51%) & shopping (16%) (James, 1997)
- Of US\$300M tourism contribution to GDP (1997), entertainment accounts for \$30M
- Of tourism's contribution to employment (71,570 jobs), 47% accommodation, shopping 19%, entertainment (6%)
 - Food & beverage
 - Transportation
 - Government
 - Investment
 - Miscellaneous

Structure of Tourism Industry Jamaica 1997

Event	Contribution to GDP (%)	Contribution to Employment
Accommodation	51.09	33,927 (47.4%)
Shopping	15.88	13,890 (19.41%)
Entertainment	9.83	4,437 (6.2%)



Development Issues

- Need stronger link between tourism, ICTs, music & entertainment
- Training
 - Technical & ICT
 - IP rights/ copyright administration/ publishing
 - Songwriting
 - Entertainment contracts
 - Management of AV production
 - Event Management
 - Artist Management
 - International tax and labour regulations
 - Alternative training models



Development Issues: Institutional Infrastructure

● Legislation

- Copyright Act (1993)
- Establishment of Jamaica Intellectual Property Office
- Enactment of Legal Deposits Act
- Upgrading of Trademarks Act to include service marks
- Entertainment Industry Encouragement Act in progress



Development Issues: Public Sector

- Public Sector Institutions
 - JAMPRO Film & Entertainment Commission
 - Jamaica Tourist Board
 - Entertainment Board
 - JIPO
 - Jamaica Cultural Development Commission
 - Division of Culture, MOEYC
 - Social Development Commission
- National Industrial Policy (1996) identified music & entertainment sector as key growth sector



Development Issues: Private Sector

● Private Sector Institutions

- Jamaica Federation of Musicians
- Jamaica Assoc. of Dramatic Artists
- Jamaica Assoc. of Female Artists
- Jamaica Assoc. of Vintage Artists
- Jamaica Songwriters Guild
- Recording Industry Association of Jamaica
- Collective Management Associations (JACAP, JPAS, JAMCOPY)
- Jamaica Signature Beats (USAID-DFID Entertainment Cluster Project)
- Jamaica Anti-Piracy Alliance
- Sound System Association of Jamaica



Development Issues: Marketing

- Access to international markets ongoing challenge
- Use of external distribution services
- Limited private sector collaboration for joint marketing
- Concept of “Brand Jamaica” as collective marketing strategy of creative, leisure, apparel, food & beverage sectors debated but not yet implemented
- Limited media outreach; traditionally facilitators of foreign content not domestic production & export
- Rapidly expanding local media market
- Government support for participation in trade fairs & locally staged media events (BET, MTV & HBO)



Challenges to Creative Industry Development

- Development of Societies and Trade Associations
- Lack of appropriate venues
- Inadequate financing
- Coordination of Government initiatives
- Sustainability of business development initiatives
- Internet accessibility & application of ICTs
- Management deficiencies in the industry



Challenges to Creative Industry Development

- Media support in international markets
- Online transaction settlement
- Documentation & preservation
- Piracy
- Training
- Data collection



Recommendations

- Development of local institutional infrastructure (public & private)
- Provision of reliable broadband & tech-support facilities at competitive prices
- On-line transaction settlement facilities
- Greater access to mainstream international media exposure & influence over content
- Further development of public and private sector marketing support & collaborations
- Public awareness about piracy and value of industries



Recommendations

- Streamlining & implementing incentives for industry (tax exemptions, duty waivers on equipment etc.)
- Coordination & streamlining of government ministries & agencies
- Development & provision of innovative training
- Creation of development funding programmes & mechanisms in financial sector
- Digitisation and storage of content by museums/archives
- Awards & commemoration