



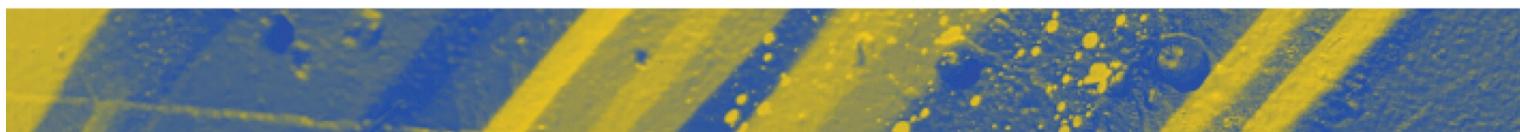
Cultural & Creative  
Industries Alliance  
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# Cultural and Creative Industries of Jamaica 2025 Survey Results

Insights into Jamaica's Cultural & Creative Industries  
Voices, Challenges and Opportunities for Growth





**Cultural & Creative  
Industries Alliance  
of Jamaica**



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## EXECUTIVE SUMMARY

The Jamaica Creative and Cultural Industries (CCI) Sector Survey 2025 engaged 578 practitioners across the island, offering the most comprehensive snapshot to date of the country's creative economy. Conducted between June and July 2025, the study combines quantitative data with qualitative insights from 196 additional respondent comments, providing a rich understanding of the sector's current landscape, challenges, and opportunities while also revealing a sector that represents a significant and growing economic force in Jamaica's economy.

The findings reveal a young, predominantly female workforce that is deeply committed to creative practice but continues to face structural and financial constraints. Despite these challenges, there is overwhelming recognition of the sector's national importance, with the vast majority of respondents identifying the CCI as "extremely significant" to Jamaica's economy.

**Important Methodological Context:** *This study surveyed 578 practitioners who represent the middle tier of Jamaica's creative economy - members of organizations, members with internet access and formal/semi-formal business operations. Our survey represents approximately 0.12% of an estimated 500,000 total creative practitioners in Jamaica. Missing from our analysis are:*

- *Top-tier earners (major artists generating JMD \$1.5B+ annually, event companies with J\$800M+ revenue)*
- *Extensive informal sector (street performers, small vendors, community-level practitioners)*
- *Tourism spillover effects (estimated additional JMD \$1.1-2.1B in hotel, restaurant, transport revenue)*

### Key Findings:

**Massive Economic Impact:** Based on comprehensive sector analysis, Jamaica's creative economy generates an estimated JMD \$107.0 billion annually (US\$690 million), representing 5.1% of Jamaica's JMD \$2.1 trillion GDP. This conservative, midpoint estimate positions Jamaica's creative sector contribution significantly above the global average of 3%. The 578 practitioners captured in this study collectively generate an estimated JMD \$2.1 billion in annual revenue.

**Critical Financing Gap:** Eighty-eight percent (88%) of surveyed practitioners require capital to grow their businesses, representing a JMD \$1–5 billion investment opportunity. This unmet demand highlights the need for new financing instruments and targeted funding mechanisms to unlock the sector's growth potential.

**Strong Geographic Concentration:** Creative activity captured in the survey remains concentrated in the Kingston and St. Andrew metropolitan area (56%), with significant creative clusters in St. Catherine (15%) and St. James (8.5%), underscoring the role of urban centres as drivers of sector growth.

**Diverse Sector Participation:** The industry spans a broad range of creative fields. Audiovisual and film lead respondent participation at 29%, followed by visual arts (26%) and music (20%), reflecting both Jamaica's traditional cultural strengths and emerging creative frontiers.

**High Economic Dependency:** A mature and professionalized workforce is evident, with 39% of practitioners earning 76–100% of their income from creative work. This demonstrates the sector's critical role as a source of full-time employment.

**Sector Pride and Identity:** Thematic analysis reveals a powerful sense of cultural identity and purpose, with 49.7% of qualitative responses shared via the survey expressing deep pride in Jamaica's creative heritage, global influence, and potential to shape cultural narratives worldwide.

The findings present clear evidence that Jamaica's Creative and Cultural Industries are not only vibrant and dynamic but also economically significant and globally relevant. The financing gap represents a transformative opportunity for investors, development partners, and policymakers to catalyse growth through targeted capital support. Coupled with a strong geographic base, diverse sectoral activity, and deep cultural identity, the sector is poised for accelerated expansion and global market integration.

In short, Jamaica's creative economy is ready for its next phase of development. With the right mix of investment, infrastructure, policy frameworks, and international partnerships, it can evolve into an even more powerful engine of economic growth, job creation, cultural diplomacy, and global influence, strengthening Jamaica's position as a creative leader on the world stage.

The findings of this survey also suggest Jamaica's creative economy is significantly larger than previously estimated, with substantial untapped potential. The sector requires targeted investment in formalization, infrastructure development, and market expansion to realize its full economic contribution.



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## 1. INTRODUCTION AND GLOBAL CONTEXT

### 1.1 The Global Creative Economy: A Multilateral Perspective

The creative economy has emerged as one of the most dynamic sectors of the 21st century, recognized by multilateral organizations as a critical driver of sustainable development, economic diversification, and inclusive growth. According to the United Nations Conference on Trade and Development (UNCTAD), the global creative economy generates approximately US\$2.2 trillion annually, representing 3% of global GDP and supporting millions of jobs worldwide (UNCTAD Creative Economy Outlook 2024).

The United Nations Educational, Scientific and Cultural Organization (UNESCO) reports that the value of the global market for creative goods more than doubled from US\$208 billion in 2002 to US\$509 billion in 2015, making it among the most rapidly expanding sectors in international trade. The World Bank's 2023 analysis emphasizes that creative industries offer unique opportunities for developing countries to diversify their economies, particularly in the post-COVID-19 recovery period.

#### Creative Economy and the Sustainable Development Goals

The 2021 International Year of Creative Economy for Sustainable Development, declared by the 74th United Nations General Assembly, underscored the sector's alignment with multiple Sustainable Development Goals (SDGs). As documented in UNCTAD's Creative Economy Outlook 2022, the creative economy contributes significantly to:

- SDG 8 (Decent Work and Economic Growth) through job creation and entrepreneurship, particularly among youth;
- SDG 9 (Industry, Innovation and Infrastructure) via digital media and creative technologies;
- SDG 11 (Sustainable Cities and Communities) through cultural expression and urban revitalization;
- SDG 4 (Quality Education) via creative education and artistic engagement;
- SDG 17 (Partnerships for the Goals) by linking creative talent to international markets.

The Global Solutions Initiative's 2021 research projects that the creative economy could account for up to 10% of global GDP by 2030, emphasizing its potential as a transformative economic force.

### 1.2 Jamaica's Creative Economy in Regional and Global Context

The Government of Jamaica has formally recognized the strategic importance of creative industries through Vision 2030 Jamaica, the national development plan that identifies creative industries as one of the country's key "growth poles." The plan sets an ambitious target for creative industries to contribute 7% of GDP by 2030, nearly doubling the current contribution level. This government commitment is further demonstrated through sector-specific policies such as the National Craft Policy for Jamaica 2015-2025, which establishes frameworks for creative sector formalization, export development, and tourism integration. These policy foundations provide a supportive environment for the sector growth documented in this study.

At the regional level, Jamaica is recognized as a creative economy leader within CARICOM's Creative Industries Development Strategy, positioning the country as a hub for Caribbean creative development and international market access.

Jamaica's creative economy stands as a remarkable example of cultural influence exceeding geographic scale. The 2025 Jamaica Economy Panel (JEP) Discussion Paper shared that in 2022 alone, Jamaica's creative sector generated approximately US\$2.2 billion, contributing over 5% to national GDP and supporting 3% of employment. This positions Jamaica's creative economy contribution above the global average and demonstrates the country's exceptional creative productivity.

Kingston's designation as a UNESCO Creative City of Music in 2015 recognizes the city's exceptional contribution to global musical culture and its potential as a creative hub. This designation brings both opportunities and responsibilities for cultural development, infrastructure investment, and international collaboration.

The Kingston Networks of Culture (K:NOC) study, funded by the European Union Cultural Relations Platform, provides crucial context for understanding Kingston's creative ecosystem. The study identified key themes essential for creative city development:

- Opportunities for trans-Atlantic artistic partnerships and cultural exchange
- Financial Inclusion and Access to Finance to counter critical barriers to creative enterprise development
- Digital Considerations, including Integration of creative industries with digital economy opportunities
- Inclusion and Community Outreach: Ensuring broad-based participation in creative economy benefits.

### 1.3 Understanding Jamaica's CCI Subsectors: Diversity and Specialization

Jamaica's creative economy encompasses a rich tapestry of interconnected subsectors, each contributing unique value to the overall ecosystem. Based on international best practices from UNESCO, CARICOM, and the UK's Department for Digital, Culture, Media, and Sport (DCMS), and localized to the Jamaican context, the CCI sectors include:

#### Core Creative Industries:

**Music Industry:** Jamaica's flagship creative export, encompassing recording, performance, production, sound engineering, and music technology. The sector includes traditional genres like reggae and dancehall alongside emerging fusion styles.

**Audiovisual and Film:** Including television production, streaming content, documentary filmmaking, commercial video production, and emerging digital content creation for social media platforms.

**Visual Arts:** Spanning traditional fine arts (painting, sculpture), contemporary art, photography, digital art, street art, and gallery operations.

#### Cultural Industries:

**Literature and Publishing:** Book publishing, poetry, magazine publishing, digital publishing, and literary events and festivals.

**Performing Arts:** Theatre, dance, comedy, spoken word, and live performance venues and production.

**Cultural Heritage:** Museums, galleries, libraries, cultural tourism, heritage interpretation, and preservation activities.

#### **Applied Creative Industries:**

**Fashion and Design:** Clothing design, textile production, fashion retail, modelling, and fashion events including Caribbean Fashion Week.

**Advertising and Creative Services:** Branding, marketing communications, graphic design, and creative campaign development.

**Digital and Creative Technology:** Gaming, animation, virtual reality, artificial intelligence art, app development, and new media production.

#### **Experience Industries:**

**Festivals and Live Events:** Event production, festival management, concert promotion, and experiential marketing.

**Culinary and Gastronomy:** Creative food production, restaurant concepts, food tourism, and culinary events that leverage Jamaica's unique food culture.

**Gifts and Crafts:** Artisanal production, craft retail, cultural souvenirs, and traditional craft preservation.

#### **Sector Interconnections and Value Chains**

These subsectors operate within an interconnected ecosystem where practitioners often work across multiple areas. For example, a visual artist might also work in advertising, while a musician might be involved in film scoring and live events. This cross-pollination creates dynamic value chains that amplify the economic impact of individual creative activities.

The 2025 survey data reveal this interconnectedness, with many respondents indicating participation in multiple CCI subsectors. This diversification strategy allows practitioners to build more resilient creative careers while contributing to the overall dynamism of Jamaica's creative economy.



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## 2. METHODOLOGY AND ECONOMIC VALUATION APPROACH

### 2.1 Research Design and Mixed-Methods Framework

This study used a structured online survey to profile Jamaica's creative economy. The instrument consisted mainly of closed-ended questions (capturing demographic, economic, and operational indicators) and open-ended questions inviting additional comments. Quantitative responses were analyzed descriptively and cross-tabulated, while open-ended responses were thematically coded to surface challenges, opportunities, and priorities in respondents' own words. This design was primarily quantitative with a limited qualitative component that adds context to the statistical results.

The approach integrated quantitative analysis with qualitative thematic insights, allowing for both the measurement of economic outcomes and the exploration of practitioner perspectives. This dual approach enabled the capture of not only sector-wide metrics such as revenue, employment, and geographic distribution, but also the lived realities and nuanced experiences that shape the sector's performance and growth potential.

#### Survey Implementation and Data Collection

- **Sample Size:** 578 responses from active practitioners
- **Data Collection Period:** June – July 2025
- **Geographic Coverage:** All 14 parishes plus diaspora representation
- **Sector Coverage:** More than 10 subsectors, including music, film, visual arts, literature, fashion, and digital media
- **Response Quality:** High completion rate with comprehensive demographic and economic data.

The open-ended questions were designed to capture additional insights beyond structured responses. Participants were invited to share anything else they wished to highlight about their experiences, challenges, or perspectives. These responses provided a rich qualitative layer for analysis and contributed to identifying emergent trends and practitioner-driven priorities.

### 2.2 Sampling Limitations and Bias Analysis

The survey methodology introduced several important biases that must be acknowledged for accurate interpretation of findings:

#### Middle-Tier Bias (Tier 2): Respondents were predominantly:

- Members of creative organizations and professional associations
- Practitioners with internet access and digital literacy
- Formal or semi-formal business operators
- Urban-concentrated (56% in Kingston & St. Andrew)
- Registered businesses (higher representation than sector average)

#### Missing Top-Tier Earners (Tier 1): The survey did not capture major revenue generators including:

- Leading dancehall artists (individual annual revenues exceeding JMD \$1.5 billion)
- Major event production companies, with annual revenues often exceeding J\$800 million+. Notably, Main Event Entertainment Group Limited (listed on the Jamaica Stock Exchange)

reported revenue of JMD \$1.717603 billion for financial year 2024, according to its 2024 Annual Report (Main Event Entertainment Group Limited, 2024).

- Large-scale festival and entertainment enterprises
- International touring and licensing operations

**Missing Tier 3 Practitioners:** The survey underrepresented informal sector participants including:

- Community-level performers and vendors
- Street artists and craft makers
- Small-scale event organizers (round robins, community dances)
- Tourism-dependent craft and service providers
- Part-time and occasional creative practitioners

## 2.3 Three-Tier Economic Model

Given these sampling limitations, we developed a **three-tier economic model** to estimate total sector impact:

**Tier 1 (Top Earners):** ~50 major practitioners

- Estimated average revenue: JMD \$100 million
- Total estimated revenue: JMD \$5.0 billion
- Examples: Major recording artists, large event companies, international touring operations

**Tier 2 (Middle Tier - Our Survey):** 578 practitioners

- Documented total revenue: JMD \$2.1 billion
- Average revenue: JMD \$3.6 million
- Profile: Professional practitioners, registered businesses, organization members

**Tier 3 (Bottom/Informal Tier):** ~499,372 practitioners

- Estimated average revenue: JMD \$200,000
- Total estimated revenue: JMD \$99.9 billion
- Profile: Community-level practitioners, informal vendors, part-time creatives

**Total Estimated Sector Revenue:** JMD \$107.0 billion (5.1% of GDP)

**Confidence Range:** JMD \$75-160 billion (3.6-7.6% of GDP)

## 2.4 Economic Valuation Approach

The economic analysis employed a systematic approach to convert documented Tier 2 (middle-tier) economic activity from the survey responses into quantifiable revenue and employment figures. To address the challenge of income range data, we mapped each survey income bracket to its midpoint value, providing a conservative yet realistic foundation for calculations. For instance, respondents indicating income "Under JMD 1 million" were assigned JMD 500,000, while those in the "JMD 1-5 million" category were valued at JMD 3,000,000. For the highest open-ended category of "JMD 50 million and over," we applied a conservative estimate of JMD 75,000,000 to avoid inflating results.

Income Range (JMD)	Assigned Value (JMD)
<b>Under \$1 million</b>	500,000
<b>\$1–5 million</b>	3,000,000
<b>\$5–10 million</b>	7,500,000
<b>\$10–20 million</b>	15,000,000
<b>\$20–50 million</b>	35,000,000
<b>\$50 million and over</b>	75,000,000 (conservative)

Using this method, total estimated revenue generated by the sample was JMD \$2.1075 billion with an average of JMD \$3.646 million per practitioner. This provides a robust empirical basis for assessing sector performance and its contribution to national economic activity. However, this midpoint methodology provides a conservative baseline that likely underestimates actual revenue, particularly in higher income brackets where the open-ended nature of the top category (JMD \$50,000,000+) required conservative estimation.

### Income Distribution Analysis

The surveyed practitioners show diverse income levels:

- **60.2%** earn under J\$1 million annually
- **28.0%** earn J\$1-5 million
- **6.2%** earn J\$5-10 million
- **2.8%** earn J\$10-20 million
- **2.8%** earn over J\$20 million

### Total Sector Economic Impact

#### Base Estimate (J\$107 billion):

- Represents 5.1% of GDP
- Incorporates realistic informal sector estimates
- Aligns with government Vision 2030 targets

#### Optimistic Estimate (J\$160 billion):

- Represents 7.6% of GDP
- Includes full tourism spillover effects
- Accounts for international revenue streams

### 2.5 Employment Impact Calculation

To assess employment generation within the creative industries, we developed a Full-Time Equivalent (FTE) calculation based on respondents' self-reported dependence on creative income. Respondents reporting 76-100% income dependency were counted as one full FTE job, while those with 51-75% dependency were weighted at 0.625, reflecting their substantial but not complete reliance on creative income. Similarly, practitioners deriving 26-50% of income from creative work contributed 0.375 FTE, and

those with 0-25% dependency added 0.125 FTE to our calculations. This approach reflects the reality that many practitioners combine creative and non-creative income streams.

Income Dependency	FTE Assigned
<b>76–100%</b>	1.0
<b>51–75%</b>	0.625
<b>26–50%</b>	0.375
<b>0–25%</b>	0.125

This weighting system produced a total of 314 FTE jobs across the sample, illustrating the sector's significant role as a source of full-time and substantial part-time employment, while also providing a realistic assessment of the sector's employment contribution that accounts for the mixed-income reality many creative practitioners face. This approach recognizes that many creative practitioners maintain portfolio careers with varying degrees of dependence on creative income.

## 2.5 Qualitative Thematic Analysis

The open-response section of the research instrument generated 196 additional qualitative submissions (33.9% of respondents), of which 155 were deemed substantive and included in the analysis. These were systematically coded into 12 thematic categories, enabling identification of key concerns, opportunities, and emergent sector priorities. Thematic coding was complemented by word frequency analysis and selective use of verbatim quotations to illustrate practitioner perspectives.

Thematic Category	Share of Responses
<b>Industry Pride and Identity</b>	49.7%
<b>Specific Sector Needs</b>	37.4%
<b>Funding and Financial Support</b>	36.1%
<b>Infrastructure and Systems</b>	20.0%
<b>Legal and IP Protection</b>	18.7%
<b>Market Access and Distribution</b>	15.5%
<b>Industry Recognition and Respect</b>	14.8%
<b>Opportunities and Growth</b>	14.8%
<b>Education and Training</b>	14.8%
<b>Collaboration and Networking</b>	12.3%
<b>Government and Policy</b>	11.6%
<b>Challenges and Barriers</b>	9.0%

## **2.6 Methodological Limitations and Quality Assurance**

While the analysis offers a robust representation of the sector, several limitations must be acknowledged. The sample may not fully represent the entire universe of practitioners, particularly those operating informally or on an occasional basis. Income estimates derived from midpoint assignments are approximations rather than precise figures. Additionally, the qualitative component reflects the perspectives of those who chose to provide open responses and may not capture all sectoral viewpoints.

To mitigate these risks, conservative assumptions were applied throughout the analysis, including the use of midpoint values and cautious employment multipliers. The decision not to extrapolate beyond observed data ensures that findings remain grounded and evidence-based. Data validation checks, including high response completion rates, consistent demographic distributions, and alignment of geographic data with known sector activity, further support the reliability and credibility of the results.



### 3. ECONOMIC IMPACT ANALYSIS

Jamaica's Cultural and Creative Industries continue to demonstrate significant and measurable economic contributions. The results indicate a dynamic, evolving sector characterised by substantial revenue generation, layered income structures, meaningful employment creation, and clear structural drivers of performance.

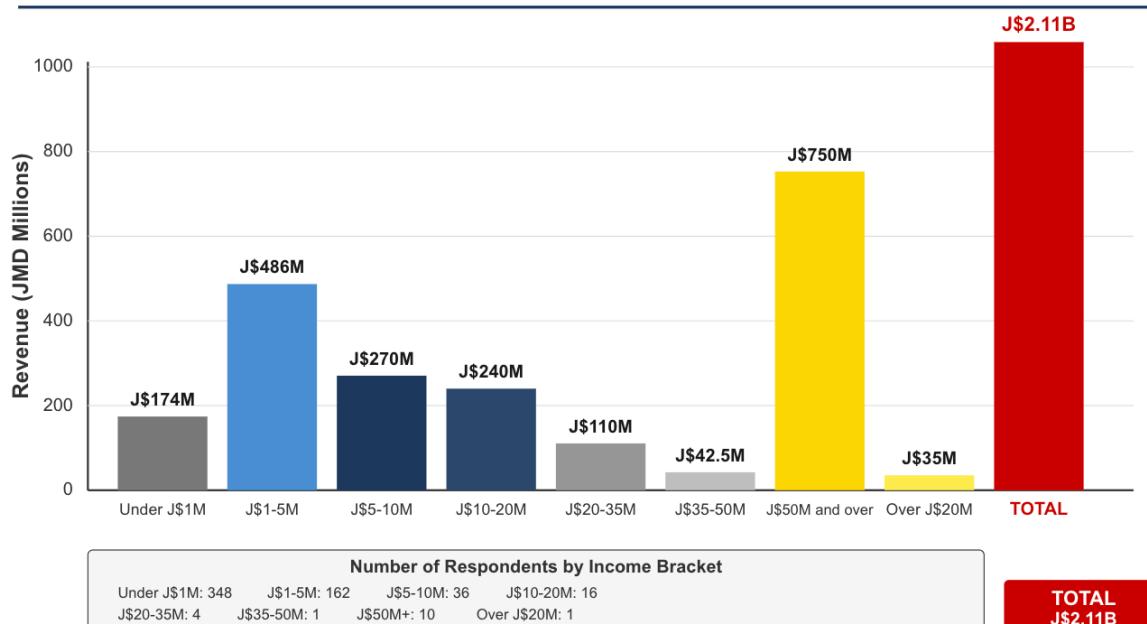
Jamaica's creative economy performance significantly exceeds regional averages. According to Inter-American Development Bank research, Jamaica's creative sector GDP contribution of over 5% surpasses the Latin American average of 3.1%, positioning Jamaica among the top creative economy performers in the Americas. The Planning Institute of Jamaica's economic surveys confirm sustained growth in creative sector employment and output, supporting the sector's trajectory toward the government's Vision 2030 target of 7% GDP contribution.

#### 3.1 Direct Economic Contribution

The 2025 Jamaica CCI Survey provides compelling evidence of the sector's substantial economic contribution. Based on comprehensive analysis of survey data and sector extrapolation, Jamaica's creative economy generates an estimated JMD \$107.0 billion annually, representing 5.1% of Jamaica's J\$2.1 trillion GDP, positioning Jamaica's creative sector contribution significantly above the global average of 3%.

Across the sample, creative enterprises and practitioners reported an estimated JMD 2.1 billion in combined annual revenue.

**Estimated Revenue Contribution by Income Bracket**



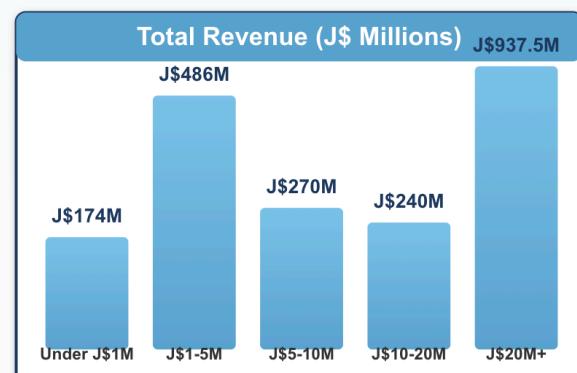
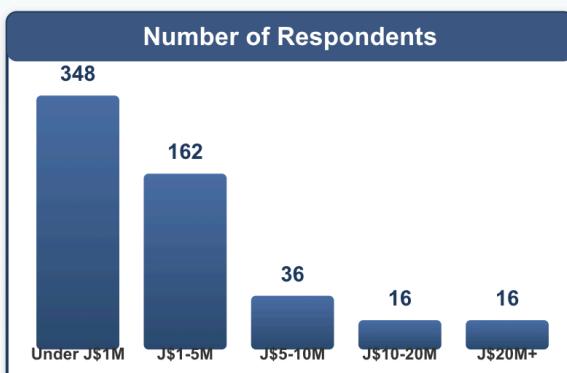
The income distribution across Jamaica's creative economy reflects a diverse ecosystem, with a mix of emerging talent, growing enterprises, and scaled creative businesses. While the majority of practitioners remain at early stages of commercial development, a substantial share operate profitable, high-performing businesses.

- 348 practitioners (60%) earn under JMD 1 million annually, representing primarily emerging businesses, individual creatives, and part-time practitioners entering or building their presence in the sector.
- 162 practitioners (28%) report annual earnings between JMD 1 million and JMD 5 million, reflecting a significant cohort of established small and medium-sized creative enterprises with consistent revenue streams.
- 68 practitioners (12%) earn over JMD 5 million annually, highlighting a group of successful, scaled creative businesses that have achieved strong market penetration and commercial sustainability.

This distribution underscores the sector's layered structure, from early-stage creatives driving innovation and cultural expression, to established SMEs and high-performing enterprises contributing significantly to Jamaica's creative economy.

## Jamaica CCI Survey 2025: Respondent Income Distribution Analysis

Total Revenue: J\$2.11 Billion (US\$13.2M) • 578 Total Respondents



**Summary by Income Bracket**

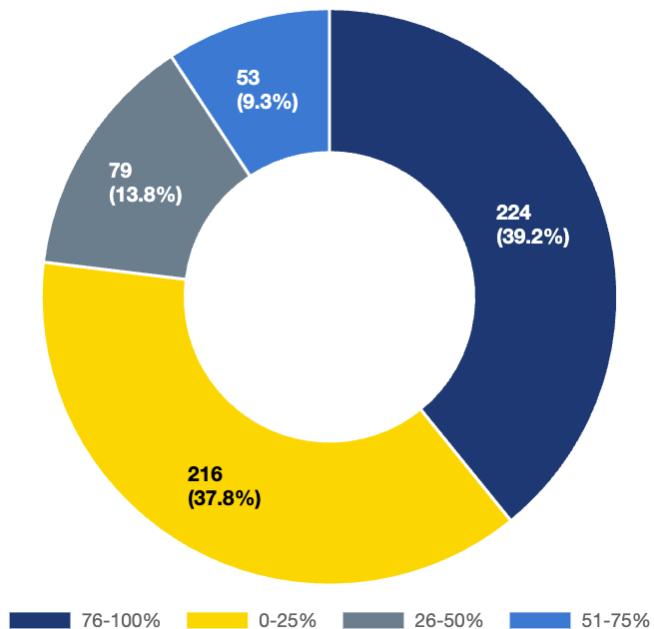
Income Bracket	Respondents	Revenue	% of Total
Under J\$1M	348	J\$174M	8.3%
J\$1-5M	162	J\$486M	23.1%
J\$5-10M	36	J\$270M	12.8%
J\$10-20M	16	J\$240M	11.4%
J\$20M+	16	J\$937.5M	44.5%
<b>TOTAL</b>	<b>578</b>	<b>J\$2.11B</b>	<b>100%</b>

A brief gender lens adds an important layer of insight: women, who make up 62.3% of the sector, are present across all income levels but are particularly concentrated in the lower and mid-tier income brackets. This suggests that targeted financing, mentorship, and growth-stage support for women-led enterprises could have a substantial impact on revenue generation, business scaling, and inclusive sector growth.

## 4.2 Employment Contribution and Full-Time Equivalents

Beyond revenue generation, the creative industries are an important source of employment and livelihoods. Based on reported income dependency, the sector accounts for an estimated 314 full-time equivalent (FTE) jobs within the sample.

### % of Total Income from Creative Work



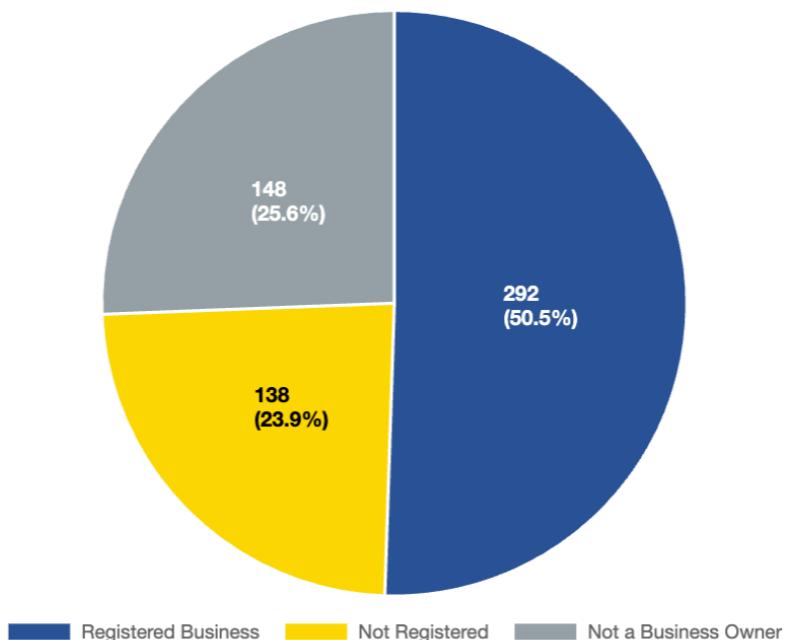
Nearly four in ten respondents (39%) report earning 76–100% of their income from creative work, indicating a significant proportion of professionals who are fully dependent on the sector for their livelihoods. An additional 9% earn 51–75% of their income from creative activities, demonstrating substantial but not complete reliance on the industry.

At the same time, 14% of practitioners derive 26–50% of their earnings from creative work, reflecting partial income dependence alongside other sources of revenue. The remaining 37% report earning 0–25% of their income from creative pursuits, highlighting the role of the sector as a secondary source of income for a large segment of participants. Together, these figures underscore the sector's dual function as both a primary employment driver and an important contributor to income diversification.

## 3.3 Economic Performance Drivers

Deeper analysis reveals several structural factors that influence income outcomes and business success. Business formalisation emerges as the single strongest predictor of financial performance. Practitioners with registered businesses are significantly more likely to achieve higher revenue levels compared to their unregistered counterparts.

## Business Registration Status



Business Status	% Earning JMD 1M+
Registered Businesses	47.3%
Unregistered Businesses	26.1%

The data indicates that registration increases the likelihood of earning more than JMD 1 million by 81%, a statistically significant relationship ( $p < 0.001$ ). This highlights the importance of policies and programmes that support formalisation, including simplified registration processes, legal support, and incentives tied to formal business status.

Practitioners aged 25–44, representing the sector's core working-age group, account for nearly 70% of all high earners, suggesting that this demographic is the engine of sector growth. These findings point to the value of targeted investment in this cohort, including access to growth capital, export support, and advanced skills training.

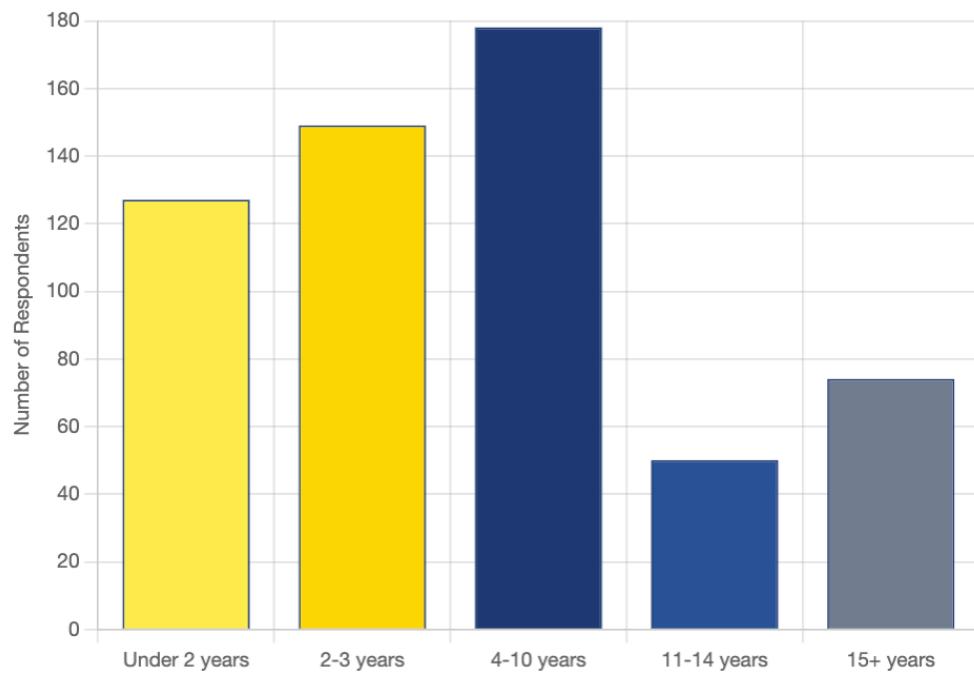
The economic evidence underscores the sector's growing importance as a contributor to national development. Three key insights emerge:

**Formalisation is a catalyst for income growth** — policies that support business registration and formal operation can dramatically improve revenue outcomes and sustainability.

**Investment in growth-stage enterprises is essential** — the 28% of practitioners earning JMD 1–5 million annually represent a critical middle segment that, with targeted financing and market access, could transition into higher revenue tiers.

**Human capital is central to performance** — targeted support for practitioners aged 25–44, who dominate higher-earning brackets, can unlock significant productivity and export potential.

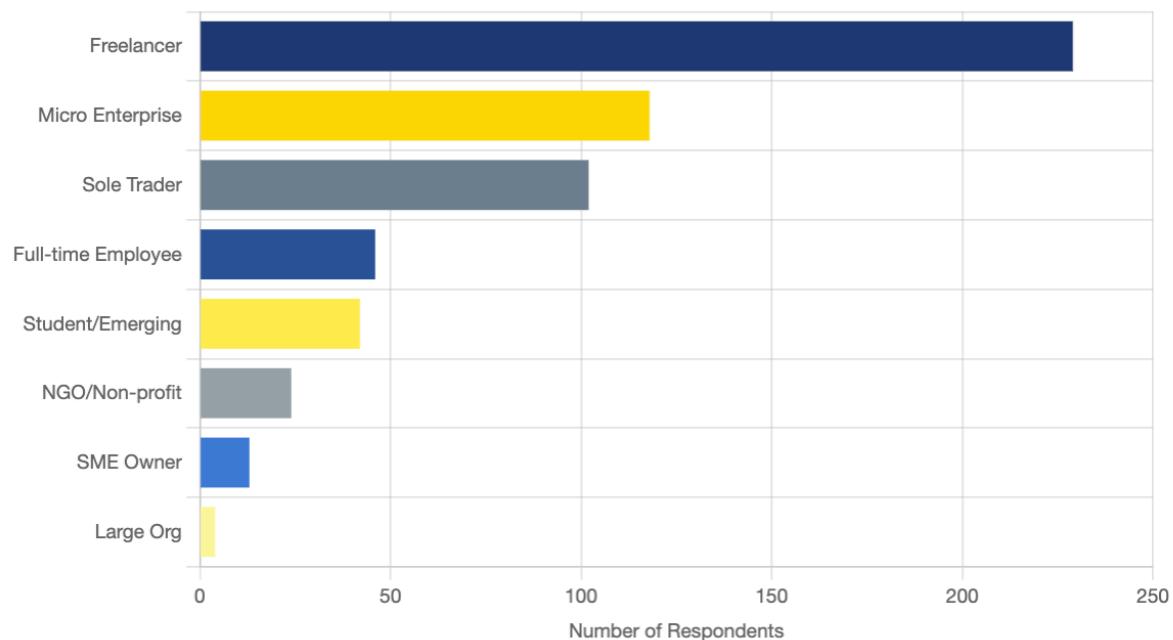
## Business/Practice Duration



The duration of business operations in Jamaica's creative economy reveals a sector characterised by a healthy mix of emerging, established, and long-standing enterprises. A substantial share of practitioners have been in business for four years or more, with 4–10 years emerging as the most common duration, which is a clear indicator of sustained market participation and business stability. At the same time, a large cohort of newer entrants (under 2 to 3 years) reflects the sector's continuous renewal and the steady flow of emerging talent and innovation.

This distribution suggests a dual imperative for policy and investment: targeted early-stage support (e.g., incubation, seed funding, mentorship) to strengthen the foundation of younger businesses, and growth-focused financing and export readiness programmes to help mid-stage and mature enterprises scale regionally and globally. The presence of a smaller but significant group of 15+ year veterans also points to opportunities for intergenerational mentorship, leadership development, and legacy-building within the sector.

## Professional Status



The professional landscape of Jamaica's creative economy is highly entrepreneurial, with freelancers (39.6%) and micro-enterprise owners (20.4%) together accounting for nearly two-thirds of all practitioners. This structure reflects a sector defined by independence, flexibility, and small-scale enterprise activity rather than large institutional organizations. However, this dominance of informal and individual work arrangements also contributes to low levels of business registration, which in turn limits access to financing, incentives, and export support.

Moreover, this structure introduces a significant risk of income under-reporting, meaning the sector's true economic contribution is likely underestimated. This under-reporting occurs for several reasons: many freelancers receive payments sporadically or in cash, making it difficult to track and report annual earnings accurately; others lack formal accounting systems, so income data is often based on estimates rather than verifiable records; and some practitioners intentionally understate earnings due to perceived taxation risks associated with unregistered operations.

These dynamics underscore the need for targeted financing, business development support, financial literacy initiatives, and formalization strategies to help practitioners scale their operations, improve income transparency, and fully realize the sector's economic potential.

Taken together, these findings position Jamaica's creative economy as a high-value, high-growth sector. With the right policy, financing, and capacity-building interventions, it can contribute even more substantially to GDP, employment, and global cultural influence.

### 3.4 Tourism Spillover Effects

The creative economy generates substantial indirect economic impact through tourism spillovers that are not captured in direct revenue calculations.

Based on the Rebuild Jamaica COVID-19 Economic Recovery Task Force Report, Jamaica's festival economy generates approximately JMD \$28.7 billion annually through:

- Direct festival revenue: Ticket sales, vendor fees, sponsorships
- Tourism multipliers: Hotel bookings, restaurant spending, transportation
- Cultural tourism: Heritage tours, craft markets, cultural experiences

Other tourism-related creative economy activity which was not directly captured in our survey:

- Events and Nightlife: JMD \$35.2 billion annually
- Tourism Multiplier Effects: Additional JMD \$1.1-2.1 billion

These spillover effects suggest our core estimates significantly undervalue the sector's total economic contribution.

### **Comparison with Previous Estimates**

Nordicity 2021 Study: The 2021 Nordicity mapping study cited a UNESCO estimate of J\$2.2 billion for Jamaica's entire creative sector. However, this figure appears significantly understated given:

- The study surveyed only ~300 individuals
- No direct economic data collection was conducted
- The estimate contradicts government data (e.g., JAMPRO Film Commission reported J\$2.5 billion for film industry alone in 2018/19)
- Our middle-tier sample alone generates J\$2.1 billion

## **3.7 International Revenue Streams**

Jamaica's creative economy generates significant foreign exchange earnings through various channels:

### **Export Revenue Streams:**

- Music licensing and royalties: International streaming, radio play, synchronization
- Film and television exports: Content licensing, co-productions, location services
- Digital content creation: Social media, gaming, online platforms
- Cultural tourism: International visitor spending on creative experiences
- Diaspora engagement: Remittances, investment, cultural events

### **Estimated Foreign Exchange Impact:**

Conservative estimates based on survey data suggest creative exports of US\$100-169 million annually, representing 1.7-2.9% of Jamaica's total export earnings (based on 2023 exports of US\$5.8 billion).



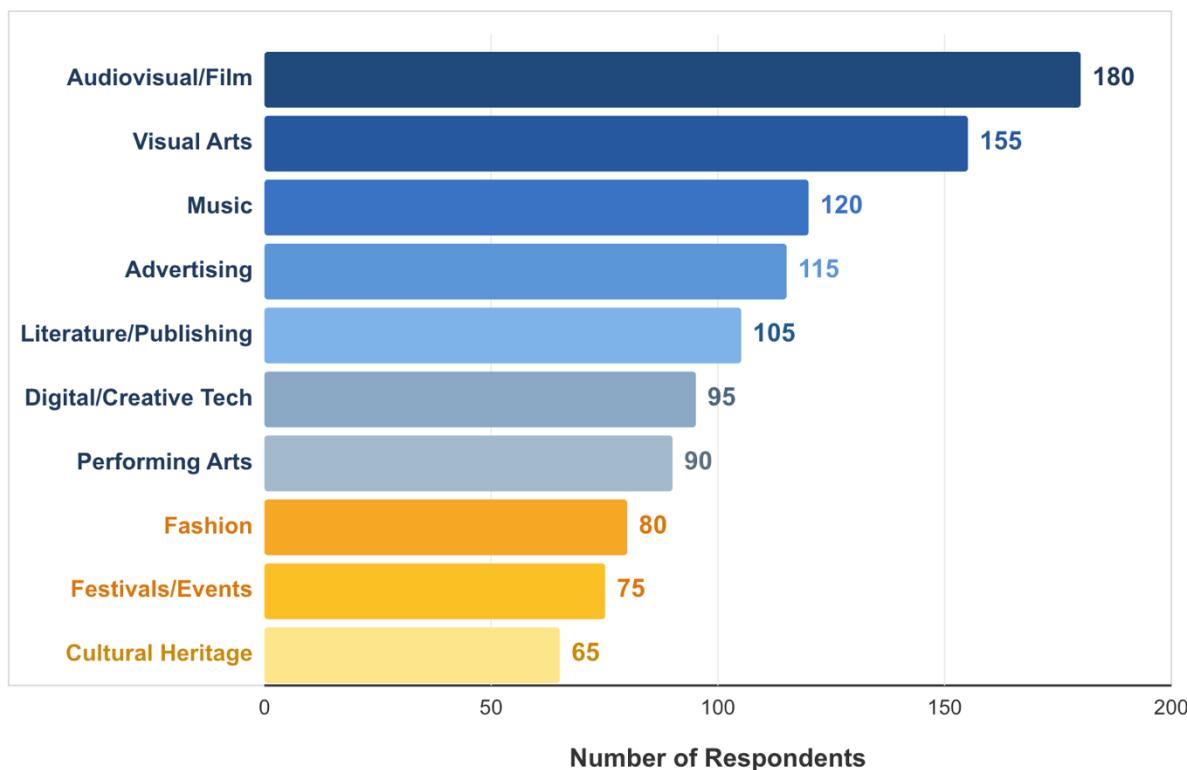
## 4. SECTOR AND GEOGRAPHIC ANALYSIS

### 4.1. CCI Sector Participation and Demographic Dynamics

Jamaica's creative economy demonstrates strong representation across a broad spectrum of industries, reflecting both the depth of its cultural heritage and the dynamism of its evolving creative landscape. There is a diverse and interconnected creative ecosystem with practitioners distributed across multiple subsectors. The survey respondents' data shows practitioners are concentrated in traditional fields such as music, visual arts, and literature, while increasingly engaging with high-growth areas such as audiovisual content, gaming, and digital creative technology.

## CCI Sector Participation

(Multiple Selections Allowed)



The sector composition of Jamaica's creative economy is highly diverse, spanning both traditional cultural industries and emerging digital frontiers. Practitioners are most active in audiovisual and film production (29%), which includes television, streaming, filmmaking, and content creation. This is followed by visual arts (26%), encompassing painting, photography, sculpture, and digital art, and music (20%), which remains a core pillar through performance, recording, production, and sound engineering. These top three together account for more than 70% of all practitioners engaged in the sector. Other significant areas of activity include advertising and creative services (19%), such as branding, marketing, and campaign design; literature and publishing (19%), including book writing, poetry, editing, and publishing; and digital and creative technology (17%), where practitioners engage in gaming, animation, AI-generated art, and new media.

This distribution highlights both the traditional strengths of Jamaica's cultural industries, such as music and visual arts, and the expanding frontiers in digital content, creative technology, and new media. The strong presence across multiple areas also points to significant opportunities for cross-sector collaboration, innovation, and growth.

The survey data reveals significant cross-sector participation, with many practitioners working across multiple creative areas:

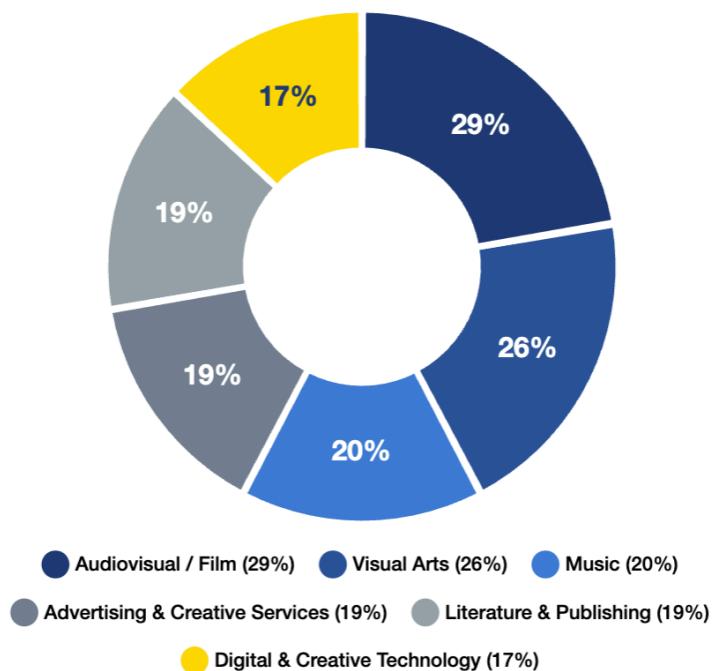
- 69.7% of respondents indicate involvement in 2+ sectors
- 59.3% work across 3+ sectors
- 56.2% maintain active practices in 4+ sectors

Common cross-sector combinations include:

- Music + Audiovisual: Film scoring, music video production
- Visual Arts + Advertising: Commercial art, brand design
- Literature + Digital: Content creation, digital publishing
- Fashion + Events: Styling, fashion show production

## Top CCI Sectors by Practitioner Participation

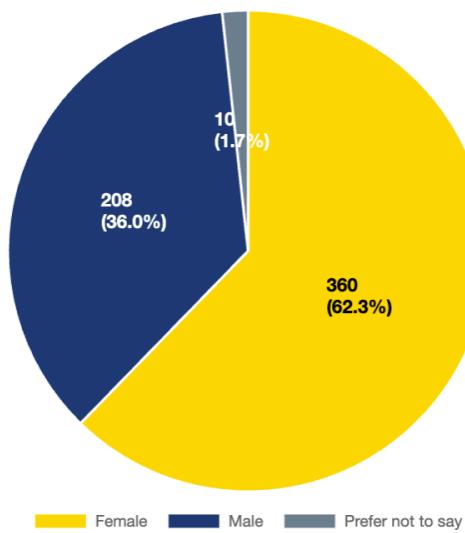
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Beyond the sector breakdown, demographic patterns reveal important dynamics shaping industry participation:

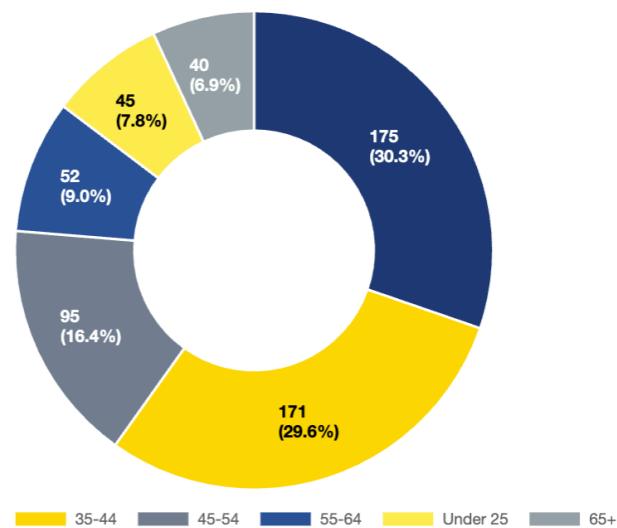
- **Gender:** Women make up 62.3% of all practitioners, underscoring the fact that Jamaica's creative economy is female-led. Women are particularly well represented in visual arts, literature, and publishing, while men are more concentrated in music, audiovisual production, and technology-based fields. This gender distribution is significant for policy design, particularly in areas of access to finance, business support, and leadership development.

### Gender Distribution



- **Age:** The creative industry's workforce is primarily working-age and innovation-oriented, with nearly 60% between 25 and 44 years old. Younger creatives (under 35) are especially active in digital media, content creation, and emerging tech, while older practitioners (45+) have greater representation in literature, publishing, and cultural heritage sectors. This distribution suggests a dynamic pipeline of new talent coexisting with a base of experienced professionals, creating opportunities for mentorship and intergenerational collaboration.

### Age Distribution



From a policy perspective, this combination of female leadership, youthful innovation, and sector diversity is a strategic asset, one that can be leveraged through targeted support for women entrepreneurs, youth-led creative start-ups, and programmes that bridge creative practice with emerging technologies.

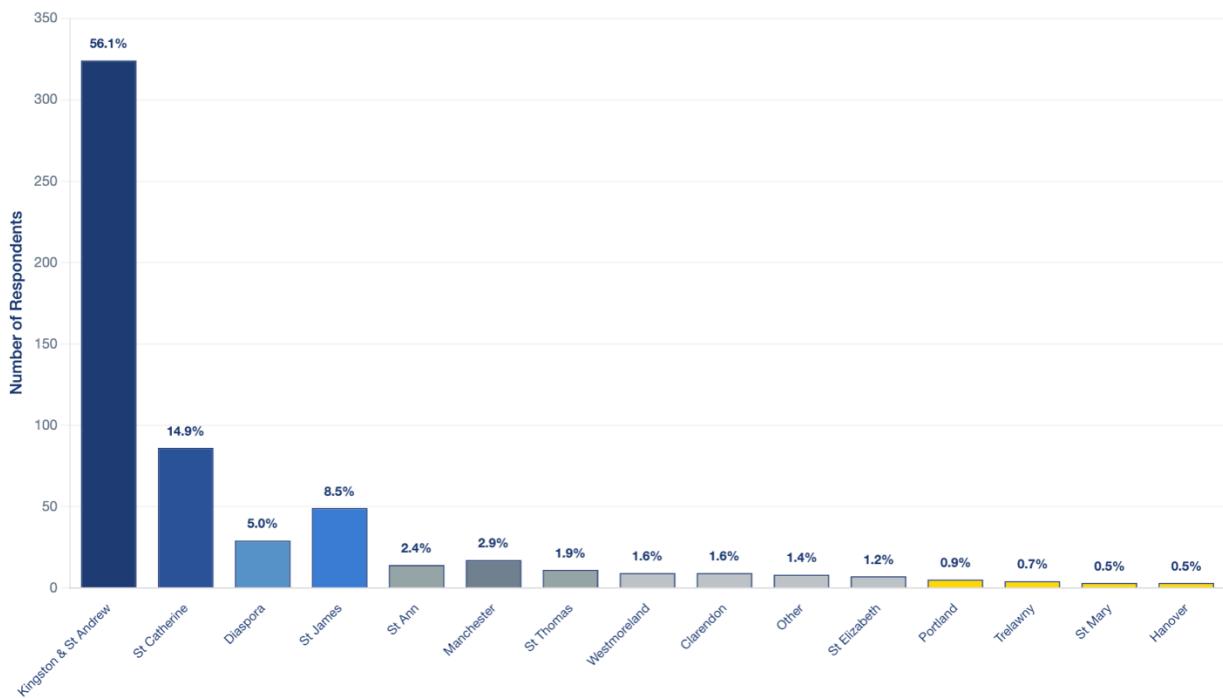
## 4.2 Geographic Distribution and Regional Dynamics

Practitioners are highly concentrated in the Kingston Metropolitan Area, which remains the country's creative hub: Kingston & St. Andrew account for 56% of respondents, reflecting the presence of major cultural institutions, production houses, media, galleries, and creative firms. St. Catherine (15%) extends this corridor, while St. James (8.5%) benefits from tourism-driven demand. The diaspora (5%; 29 practitioners) maintains active ties that support cultural exchange and global market access. The remaining 15.5% are spread across 11 parishes, indicating steady creative activity in rural communities and smaller towns.

However, the geographic story becomes more nuanced when intersected with gender and age:

- **Urban Female Concentration:** Female practitioners are particularly concentrated in Kingston and St. Andrew, where they lead a significant share of visual arts, publishing, and advertising businesses.
- **Youthful Creative Clusters:** Younger creatives are overrepresented in urban and peri-urban centres such as Kingston and Spanish Town, often working in digital, audiovisual, and new media ventures.
- **Experienced Practitioners in Tourism Hubs:** Older practitioners (45+) show stronger representation in St. James and other tourism-dependent regions, where cultural heritage, craft, and music performance remain key drivers.

## Geographic Distribution of Jamaican CCI Practitioners



The intersection of location, age, and gender shapes the opportunities and constraints within Jamaica's creative economy. This diversity underscores the need for targeted policy responses and investment strategies that reflect the realities of who participates in the sector, where they are located, and how they operate. Strategic support for high-growth areas such as audiovisual production and digital creative technology can accelerate export earnings, while capacity-building initiatives and financing for visual arts, music, and literature can deepen cultural impact and strengthen Jamaica's global market presence. A holistic approach, combining skills development, intellectual property protection, access to finance, and market development, will be essential to sustaining growth and positioning Jamaica as a regional leader in the global creative economy. Complementary strategies such as creative hubs for youth in urban areas, targeted business support for women entrepreneurs, and cultural tourism initiatives in rural and coastal regions will help ensure more inclusive and geographically balanced growth.

Ultimately, Jamaica's creative economy is not only defined by *what* practitioners produce but also by *who* they are and *where* they operate. Recognising and responding to these intersecting dynamics is critical to unlocking the sector's full potential as a driver of economic growth, cultural influence, and social transformation.

### 4.3 Creative Infrastructure and Ecosystem Development

#### Kingston Creative Infrastructure

Jamaica's creative economy benefits from established infrastructure concentrated primarily in the Kingston metropolitan area. The capital hosts world-renowned recording studios including Tuff Gong, Big Yard, and Anchor Studios, which have been instrumental in producing internationally acclaimed Jamaican music. Performance venues such as the National Arena, Emancipation Park, and Ranny Williams Entertainment Center, provide platforms for live entertainment and cultural events. Educational

institutions including Edna Manley College and the University of the West Indies offer specialized creative programs, while cultural institutions like the National Gallery, Institute of Jamaica, and Bob Marley Museum preserve and promote Jamaica's rich cultural heritage.

The emerging infrastructure includes innovative spaces such as the Kingston Creative Coworking Space and Creative Production Centre, which provide collaborative environments for creative professionals. Digital facilities are expanding with new streaming studios and podcast production spaces, while maker spaces including fab labs, artisan workshops, and design studios support hands-on creative production and prototyping.

### **Regional Infrastructure Development Needs**

Beyond Kingston, significant infrastructure gaps exist across Jamaica's parishes. Rural parishes face the greatest infrastructure challenges, requiring mobile creative services and outreach programs, community cultural centers and performance spaces, improved digital connectivity and online market access, and creative skills training and capacity building programs. These infrastructure investments are essential for distributing creative economy benefits beyond the Kingston metropolitan area and ensuring that Jamaica's cultural richness is preserved and developed across parishes.

The development of this infrastructure requires coordinated investment from government, private sector, and international partners to create a truly national creative ecosystem that can compete globally while serving local communities.

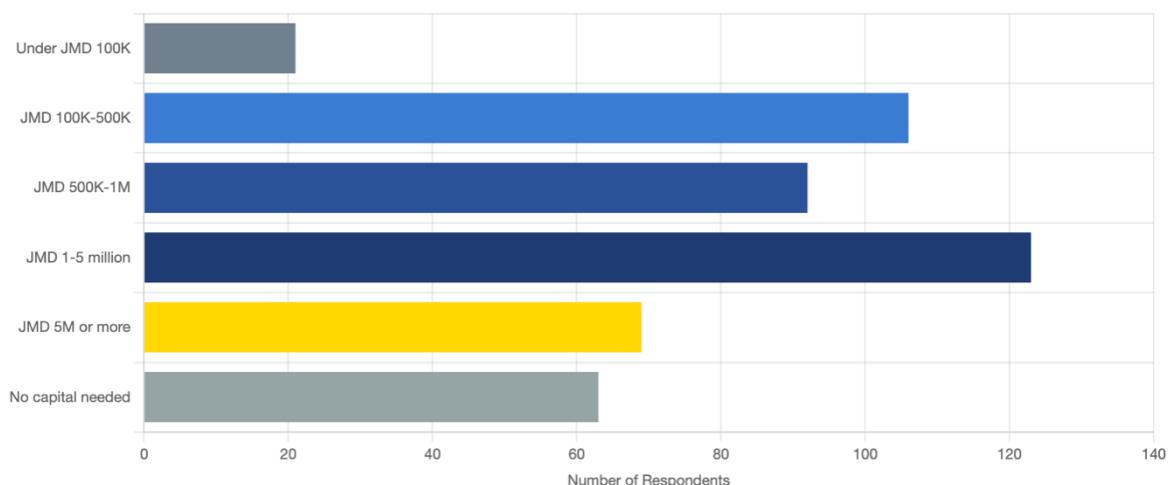


## 5. CHALLENGES AND INVESTMENT OPPORTUNITIES

### 5.1. The JMD 1–5 Billion Financing Gap

A central finding of this analysis is the significant financing gap that continues to constrain the growth and scalability of Jamaica’s creative and cultural industries. An overwhelming 88% of practitioners report needing external capital to expand their operations, highlighting a substantial and largely untapped investment opportunity.

**Financing Amount Needed by Jamaican CCI Practitioners**



#### Investment Demand Breakdown:

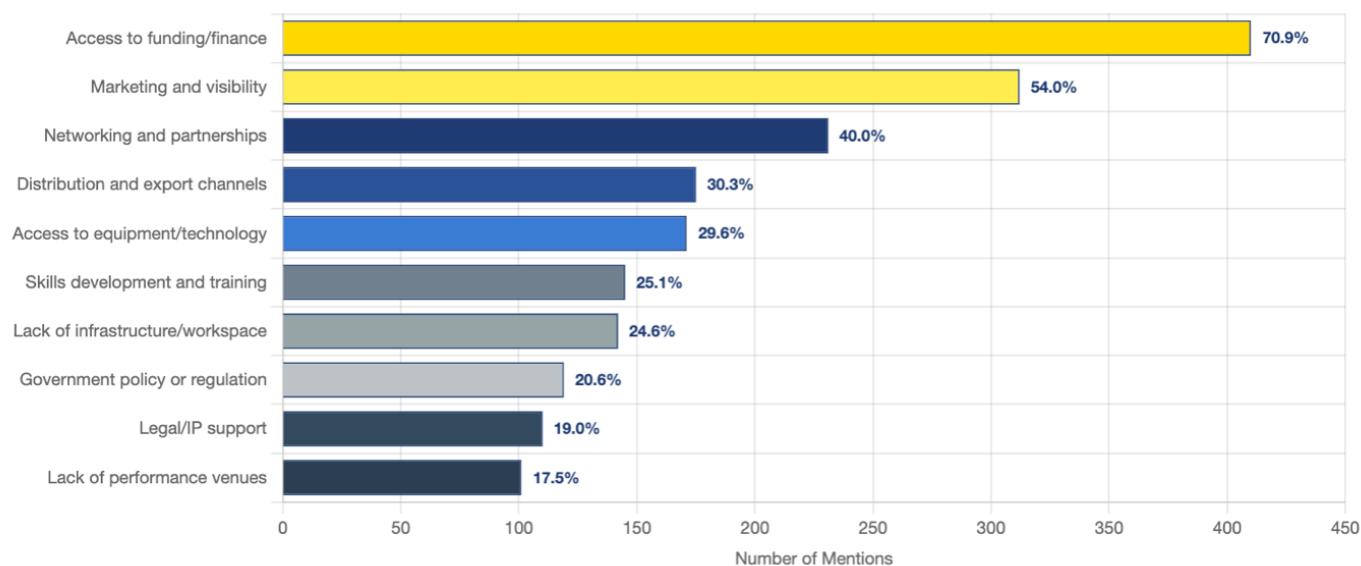
- 123 practitioners require JMD 1–5 million, representing the most common level of capital needed for business development and expansion.
- 106 practitioners seek JMD 100,000–500,000, typically for early-stage investments such as equipment purchases, marketing, or formalizing business operations.
- 92 practitioners need JMD 500,000–1 million, reflecting demand for growth capital to scale production capacity, enter new markets, or hire additional staff.
- 69 practitioners require over JMD 5 million, signalling readiness for scale-up financing and larger strategic investments.

The total estimated financing demand of JMD 1–5 billion underscores both the scale of unmet capital needs and the transformative potential of targeted financial instruments. Bridging this gap will require coordinated public–private approaches, including creative industry financing facilities, grant and seed-funding programmes, venture and impact investment vehicles, and stronger linkages to traditional financial institutions. Strategic investment in this space would not only unlock business growth and job creation but also catalyse export expansion, intellectual property commercialisation, and greater participation in global creative value chains.

## 5.2. Systemic Challenges Requiring Strategic Intervention

Beyond financing constraints, practitioners have identified a set of persistent structural barriers that continue to limit the growth, competitiveness, and global reach of Jamaica's creative and cultural industries. Addressing these requires whole-of-ecosystem solutions that integrate policy action, investment, and institutional support.

### Top 10 Challenges Facing Creative Professionals



#### Priority Challenges Identified:

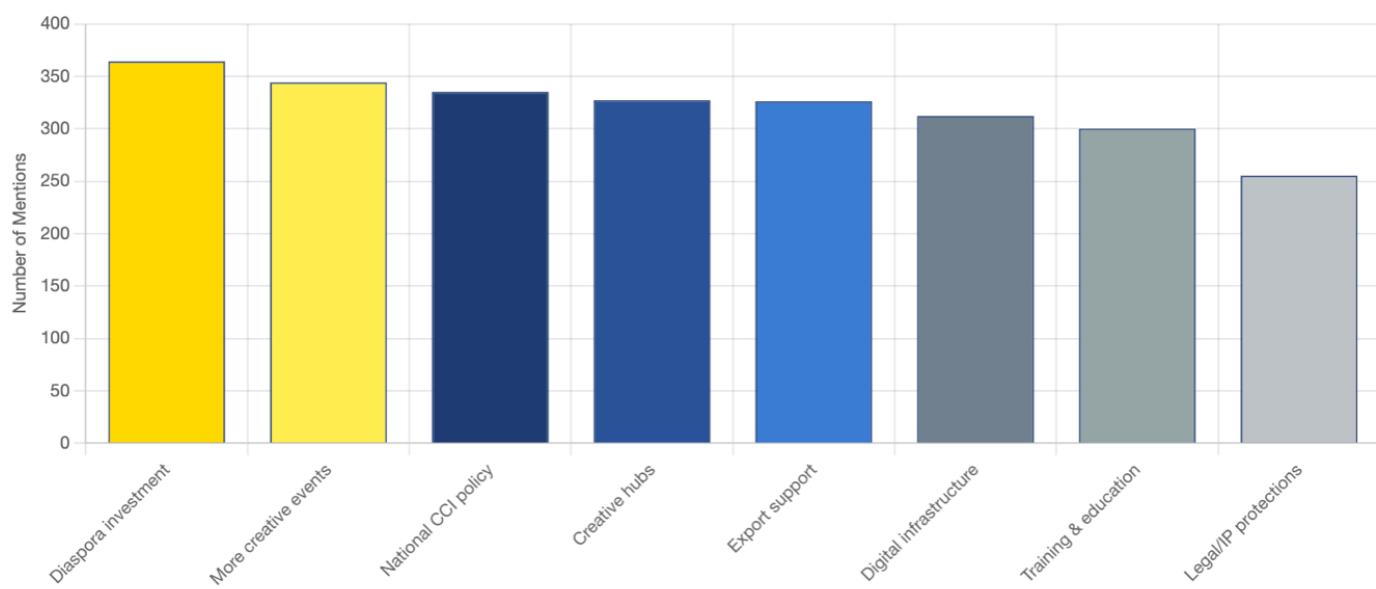
- Access to Funding and Finance (71%)** – The single most significant barrier, with the majority of practitioners unable to access the capital required to scale operations, formalize their businesses, or invest in new opportunities.
- Marketing and Visibility (54%)** – Many creatives face difficulties building brand recognition, reaching wider audiences, and positioning their products or services in local and international markets.
- Networking and Partnerships (40%)** – Limited opportunities for industry collaboration and business-to-business connections restrict innovation, mentorship, and cross-sector growth.
- Distribution and Export Channels (30%)** – Access to regional and global markets remains limited, constraining the sector's ability to capture export revenue and participate in global creative value chains.
- Access to Equipment and Technology (30%)** – Many practitioners lack the infrastructure, production tools, and digital technologies needed to improve quality, efficiency, and competitiveness.

These systemic challenges point to the need for a whole-of-ecosystem approach that combines financial support with capacity-building initiatives, market development strategies, infrastructure investment, and institutional coordination. Building strong networks, enabling access to technology, and opening export pathways will be essential to transforming Jamaica's creative sector from a collection of individual enterprises into a cohesive, globally competitive industry.

### 5.3. Clear Solutions: Practitioner-Identified Priorities

There is a strong consensus among industry stakeholders on the types of interventions most likely to accelerate growth, deepen market impact, and position Jamaica's creative economy for global success. These priorities reflect a combination of financial, policy, infrastructural, and market-oriented measures that, if implemented collaboratively, could unlock significant new opportunities for the sector.

#### Top Factors to Strengthen Creative Economy



#### Top Practitioner-Identified Priorities for Sector Development:

1. **Diaspora Investment and Funding (63%)** – Leveraging Jamaica's extensive global networks to unlock capital, mentorship, and new market opportunities.
2. **More Creative Events and Festivals (60%)** – Expanding platforms for audience building, market development, and revenue generation.
3. **National CCI Policy Framework (58%)** – A coordinated national strategy and policy environment is essential to guide public investment, strengthen institutional support, and align creative industry growth with broader national development goals.
4. **Creative Hubs and Coworking Spaces (57%)** – Accessible infrastructure for collaboration, production, and business incubation would provide essential support for emerging creatives and foster innovation.
5. **Export and International Touring Support (56%)** – Facilitating access to international markets through trade missions, touring grants, and export readiness programs would significantly expand the sector's global reach and revenue potential.

Taken together, these priorities form a strategic roadmap for sector transformation. They underscore the importance of diaspora engagement, targeted public-private partnerships, and institutional leadership in building a robust creative ecosystem. Implementing these interventions would not only strengthen Jamaica's domestic creative economy but also elevate the country's global cultural influence and competitiveness.

#### **5.4. Professional Status and Investment Readiness**

Cross-referencing professional status with financing needs reveals important insights for policy design and investment targeting:

- Freelancers show the highest reliance on creative income, with 42.4% reporting 76–100% income dependency. This group often faces barriers to scaling and would benefit from targeted business transition support.
- Business owners demonstrate stronger income diversification, but also significant financing needs to expand operations and enter new markets.

##### **Investment Readiness by Income Dependency:**

- 51–75% dependency: 94.3% require financing — indicating they are in an active growth phase and represent a prime target for investment.
- 76–100% dependency: 88.3% require financing — underscoring the need for capital to sustain and scale established businesses.
- 26–50% dependency: 92.4% require financing — suggesting potential for rapid growth if capital access barriers are removed.

Practitioners with mid- to high-level income dependency represent the sector's most investment-ready cohort. Tailored financing instruments, such as revenue-based lending, venture funding, or equipment financing, could accelerate their transition into higher revenue brackets and deeper market participation.



## 6. THEMATIC ANALYSIS: PRACTITIONER PERSPECTIVES AND EMERGING INSIGHTS

### 6.1 Overview of Qualitative Themes

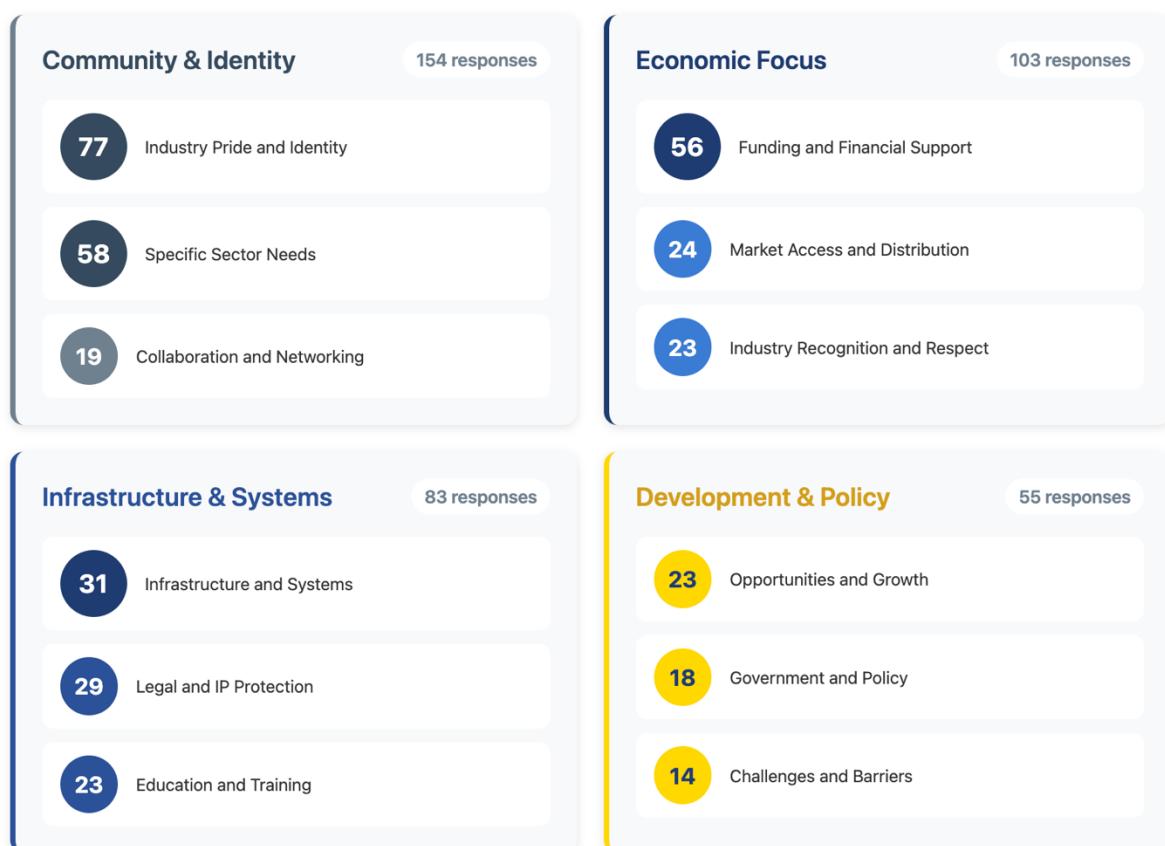
The thematic analysis of 155 meaningful open-ended responses offers valuable context to the quantitative data, revealing how creative practitioners experience, interpret, and prioritise the challenges and opportunities within Jamaica's creative economy. Twelve distinct themes emerged from this analysis, highlighting the sector's deep sense of cultural purpose, specific industry needs, financing challenges, legal concerns, and aspirations for growth and recognition. Together, these insights underscore that quantitative indicators alone cannot capture the full story of Jamaica's creative and cultural industries; practitioners' voices provide crucial evidence to guide effective policy, investment, and ecosystem development.

### 6.2 Industry Pride and Cultural Identity (49.7%)

The most frequently cited theme is a profound sense of cultural identity and pride. Nearly half of all comments emphasized Jamaica's global creative impact and the sector's role in shaping national identity and international perception. Practitioners consistently described their work as part of a larger cultural mission — one that blends economic contribution with social influence and heritage preservation.

#### Thematic Relationship Map: Jamaica CCI Survey 2025

Themes Grouped by Focus Area with Response Counts



*“Being a part of some of the most dynamic and creative people on earth.” – VISUAL ARTIST*

*“Music is the most significant export that has really put Jamaica on the map.” – MUSIC PRODUCER*

This strong sense of identity provides a foundation for collective advocacy and global positioning. It suggests that policies should not only support economic growth but also protect and amplify the cultural capital that underpins Jamaica’s soft power on the global stage.

### **6.3 Specific Sector Development Needs (37.4%)**

Practitioners also highlighted sector-specific needs that go beyond broad industry challenges, illustrating the importance of targeted and nuanced policy responses. The comments reveal significant disparities in visibility, support, and infrastructure across creative subsectors.

*“Jamaica has a vibrant culture and talent base, I just wish there were more happening for us in terms of film. Why don’t we have film series? These films could shape how the world interacts with us and our culture.” – FILM INDUSTRY PRACTITIONER*

*“More education and recognition are needed for interior designers. It feels like we’re out of the loop, yet we have so much to contribute.” – INTERIOR DESIGN PROFESSIONAL*

*“Diversify the group of performers engaged for events — too often the same people are called while others with equal talent remain overlooked.” – PERFORMING ARTIST*

These perspectives indicate that broad policy frameworks must be complemented by subsector-specific strategies, including industry-tailored incentives, regulatory reforms, workforce development, and promotion initiatives, to ensure balanced sector growth.

### **6.4 Funding and Financial Support Challenges (36.1%)**

While 71% of structured survey respondents cited funding as their primary barrier, the qualitative responses reveal the depth and diversity of financing challenges facing practitioners. These extend beyond start-up capital to include issues like export financing, education support, and sustainable revenue generation.

*“I need financial support for travel to promote my books internationally. Bookshops here don’t even stock them.” – PUBLISHED AUTHOR*

*“We need more poetry competitions adults can win prize money from — adults have families to feed too.” – POET*

*“Funding is the biggest challenge, especially for overseas creative education. SLB doesn’t finance these programmes, and most grants are for STEM, not creative fields.” – ANIMATION STUDENT*

These testimonies illustrate the urgent need for targeted financing instruments, including export credit, education loans, and grant programmes, that reflect the diverse stages of creative practice. Policy responses should also consider the role of diaspora investment, revenue-based financing, and public-private partnerships to bridge the financing gap.

## 6.5 Legal and Intellectual Property Concerns (18.7%)

While only 25% of structured survey respondents identified legal or IP issues as a top barrier, qualitative responses reveal far deeper concerns about piracy, enforcement, and the lack of international legal protections. Practitioners stressed the vulnerability of Jamaican creative work in global markets and the urgent need for stronger IP frameworks.

*“Please place major emphasis on legal/IP protections outside our territory — international companies pirate our work all the time.” – CREATIVE RIGHTS ADVOCATE*

This highlights the need for enhanced legal literacy programmes, international IP cooperation agreements, and enforcement mechanisms. Addressing these issues is crucial not only for protecting creative work but also for unlocking revenue from licensing, royalties, and other IP-related income streams.

## 6.6 Systemic Coordination and Recognition Issues

Many practitioners described a fragmented sector lacking the coordination, recognition, and structural support necessary for sustained growth. Some cited institutional gatekeeping and a lack of access to decision-making spaces as major barriers, while others pointed to the undervaluation of creative work in Jamaica’s domestic context.

*“We are too disjointed. Everyone is working in silos.” – INDUSTRY OBSERVER*

*“Why are we forced to go overseas to be recognised by our own country?” – ESTABLISHED CREATIVE PROFESSIONAL*

*“More opportunities and spaces need to be created for emerging creatives. Gatekeeping shouldn’t stifle talent.” – EMERGING CREATIVE*

*“Keep veteran artists — many with family responsibilities — in the loop.”* – VETERAN FREELANCE ARTIST

These responses point to the need for institutional coordination, sector-wide advocacy platforms, and inclusive industry governance. Recognition mechanisms, including awards, showcases, and national honours, could also help elevate the profile of creative work domestically.

### **6.7 Optimism and Support for Development Initiatives**

Despite persistent challenges, practitioners expressed strong optimism and enthusiasm about current initiatives and the future of Jamaica’s creative economy. Many view recent efforts as the most significant steps ever taken toward sector development.

*“CCI practitioners have never had it this good. Thank you.”* – VETERAN CREATIVE

*“This is one of the best decisions made for the growth of future generations.”* – EMERGING PRACTITIONER

Such sentiments underscore a high level of sector engagement and willingness to collaborate — a crucial foundation for successful policy implementation and public-private partnerships.

### **6.8 Specific Policy Recommendations from Practitioners**

Practitioners also offered concrete policy proposals that extend beyond survey options, providing valuable insights for decision-makers:

*“Include poetry in national events like Grand Gala.”* – SPOKEN WORD ARTIST

*“Reform customs to make trade in creative goods easier.”* – CREATIVE ENTREPRENEUR

*“We need access to international payment systems like Stripe.”* – DIGITAL CREATIVE

These suggestions point to tangible interventions, from trade facilitation and cultural mainstreaming to digital infrastructure improvements, that could significantly strengthen the enabling environment for creative businesses.

### **6.9 Cross-Referenced Thematic Insights**

Deeper cross-referencing of qualitative data with demographic variables reveals important patterns that can guide targeted policy and investment strategies:

- **Age and Concern Patterns:** Younger practitioners (25–34) prioritise funding and education, mid-career creatives (35–44) emphasise infrastructure and legal protections, while older practitioners (45+) focus on recognition and coordination.
- **Geographic Variations:** Practitioners in Kingston highlight export and international market access, rural creatives stress infrastructure and access barriers, and diaspora respondents emphasise collaboration and connectivity.
- **Professional Status:** Freelancers emphasise funding and networking, business owners prioritise legal frameworks and policy support, and employees highlight career development and recognition.

These patterns demonstrate that one-size-fits-all policies are insufficient. Effective sector development requires segmented strategies tailored to the needs of different practitioner groups, from diaspora engagement and rural infrastructure investment to targeted legal reform and youth-focused capacity-building.



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## 7. SECTOR CONFIDENCE AND ECONOMIC RECOGNITION

### 7.1. Recognition of Economic Importance

Jamaica's creative and cultural industries practitioners demonstrate widespread confidence in the sector's economic significance; a signal of a maturing industry that understands its role in national development and is strategically positioned for growth.

#### Practitioner Perceptions of Sector Significance:

- 46.5%** – “Extremely significant” (269 respondents)
- 22.0%** – “Significant” (127 respondents)
- 8.8%** – “Somewhat significant” (51 respondents)
- 17.5%** – “I don't know” (101 respondents)
- 5.2%** – “Not significant” (30 respondents)

The findings present a clear picture of strong internal confidence and recognition of the sector's value. Over three-quarters (77.3%) of practitioners view the creative economy as economically impactful, highlighting broad consensus that the sector is a vital driver of national development. Nearly seven in ten respondents consider the sector highly significant, either “extremely significant” or “significant,” pointing to a deep understanding of its contribution to GDP, employment, and export growth. The data also reveals that while this level of confidence is widespread, a noteworthy 17.5% of respondents expressed uncertainty about the sector's economic role, underscoring the need for improved data dissemination and sector-wide education. The very low share of respondents (5.2%) who doubt the sector's importance further confirms that scepticism is minimal, and that there is strong alignment around the creative economy's strategic relevance.

These findings carry important strategic implications for policymakers, investors, and industry leaders. The widespread practitioner confidence provides a robust foundation for policy advocacy, making a compelling case for targeted public investment, enabling legislation, and supportive infrastructure to accelerate sector growth. Strengthening education and communication around the sector's economic performance, particularly for those expressing uncertainty, can deepen sector cohesion and enhance collective advocacy. Moreover, the strong internal consensus enhances the sector's investment narrative, positioning Jamaica's creative economy as an attractive space for private capital, development finance, and public-private partnerships. Together, these insights suggest that with the right enabling environment, the sector's already strong economic performance can be significantly scaled.

The comparative context further reinforces the strength of these findings. Practitioner confidence in Jamaica's CCI sector, at 77.3%, exceeds many international benchmarks, where positive recognition typically ranges from 60% to 75%. This high level of internal validation, combined with robust economic fundamentals such as the JMD 2.1 billion in annual revenue generated by the 578 practitioners surveyed, demonstrates that sector perceptions are supported by tangible economic outcomes. The alignment between practitioner confidence and measurable performance reflects a sector that is not only aware of its contribution but is also poised to partner with government, investors, and international agencies to unlock its full potential on the global stage.



KIM  
SHANELLE  
INSPIRATIONS

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## 8. STRATEGIC RECOMMENDATIONS

Translating the creative and cultural industries' potential into sustained economic growth requires coordinated action across government, financial institutions, and industry stakeholders. The following recommendations outline strategic interventions designed to address structural barriers, unlock investment, strengthen institutional support, and position Jamaica's CCI sector as a globally competitive driver of innovation, employment, and export growth.

### **8.1. For Government and Policy Makers**

#### ***Develop a National CCI Investment Strategy***

Closing the estimated JMD 1–5 billion financing gap is central to unlocking sector growth. Government should establish a comprehensive creative economy investment facility, including a dedicated CCI investment fund, targeted grant schemes, and loan guarantees, to mobilize both public and private capital. Incentives such as tax relief for creative enterprises and investors could further stimulate participation and scale.

#### ***Build Creative Infrastructure Beyond Kingston***

While Kingston remains the sector's hub, there is significant potential for regional cluster development. Government should invest in creative hubs, co-working spaces, and incubators in emerging centres such as St. James (creative tourism and visual arts), Manchester (digital arts and technology), and St. Catherine (audiovisual and content production). Enhanced digital infrastructure, streamlined export facilitation systems, and sector-specific logistics support will enable creatives to produce, distribute, and monetize their work more effectively.

#### ***Strengthen Intellectual Property and Legal Frameworks***

Practitioners consistently identify weak IP protection, particularly in international markets, as a major barrier. Strengthening legislative frameworks, building capacity for enforcement, and pursuing cross-border IP cooperation agreements should be national priorities. These efforts will protect Jamaican creative content, support commercialization, and build confidence for investment and export.

#### ***Leverage the Global Jamaican Diaspora***

The diaspora represents a powerful source of capital, expertise, and market access. Government can formalise this relationship by creating diaspora investment mechanisms that channel remittances and global financing into creative enterprises. Structured support for international touring, trade missions, and cultural export promotion will deepen global market penetration and strengthen cultural diplomacy.

#### ***Invest in Creative Education and Skills Development***

Gaps in education and training, particularly for international study and practitioners outside of the youth cohort, limit sector competitiveness. Expanding scholarships for creative disciplines, supporting professional development pathways, and embedding entrepreneurship training into creative curricula will strengthen the talent pipeline and prepare practitioners for global markets.

#### ***Prioritise Business Formalisation***

With 23.9% of practitioners unregistered, formalization remains one of the highest-return interventions available. Simplifying registration processes, reducing costs, and linking incentives to formal status can significantly increase revenue outcomes, with registered businesses 81% more likely to earn over JMD 1 million annually. This intervention directly enhances tax revenues, export readiness, and access to finance.

## **8.2. For Investors and Financial Institutions**

### ***Recognise a High-Growth Market Opportunity***

The creative sector represents a substantial untapped market, with over JMD 5 billion in identified capital demand. Investment in this sector offers strong potential returns, supported by demonstrable revenue growth and rising global demand for Jamaican creative products.

### ***Design Creative-Specific Financial Products***

Traditional finance models are often poorly suited to creative business realities. Financial institutions should develop flexible lending instruments tailored to irregular cash flows, including revenue-based financing, project-based loans, and equipment leasing. Dedicated facilities for early-stage enterprises and scale-up capital for growth-stage companies would help bridge the financing gap and unlock private sector expansion.

### ***Target High-Impact Investment Segments***

Evidence points to specific segments with strong potential for returns:

- Registered businesses aged 3–7 years – at optimal scaling stage
- Mid-dependency practitioners (51–75%) – with the highest financing demand
- Practitioners aged 25–44 – who dominate higher earning brackets
- Parish-based clusters – where specialisations (e.g., creative tourism, audiovisual) can be leveraged

Geographically, investment strategies should prioritise Kingston (scale-up and export development), St. James (creative tourism integration), and Manchester (digital arts and tech development).

## **8.3. For Industry Stakeholders**

### ***Strengthen Sector Organisation and Collective Advocacy***

The sector's high internal recognition of its economic significance provides a strong foundation for coordinated advocacy. Industry bodies should push for policy reform, institutional support, and dedicated public investment, while also addressing fragmentation through more cohesive governance and collaboration structures. Marketing consortia, export alliances, and sector-wide branding initiatives can further elevate Jamaica's global creative profile. A coordinated "Brand Jamaica Creative Exports" campaign, anchored in cultural authenticity and innovation, would enhance competitiveness in key markets.

### ***Expand Global Market Access and Export Development***

Export readiness remains uneven across the sector. Stakeholders should collaborate with government and development partners to deliver targeted export training, capacity-building, and international market intelligence services. Structured diaspora-focused campaigns, trade fair participation, and touring support can unlock new commercial opportunities and build stronger global distribution channels.

### ***Address Gatekeeping, Inclusion, and Intergenerational Exchange***

Qualitative evidence highlights concerns around gatekeeping, unequal access, and limited opportunities for emerging creatives. Building mentorship networks, promoting intergenerational knowledge transfer, and designing inclusion-focused programmes will expand participation and strengthen the sector's talent pipeline. Ensuring equitable representation, including for women, youth, and rural practitioners, is critical to sustained growth and innovation.

***Build Sector-Specific Support Mechanisms***

Practitioner feedback highlights the need for more tailored support across subsectors — from film infrastructure and poetry platforms to interior design recognition and applied arts inclusion. Industry associations should work with policymakers to co-design targeted interventions that reflect the distinct needs of each creative discipline.



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## CONCLUSION: A SECTOR READY FOR STRATEGIC INVESTMENT

The 2025 analysis confirms that Jamaica's creative economy is not only a vital cultural force but also a significant and expanding economic driver: a strategic economic asset. A sample of 578 practitioners collectively generating JMD 2.1 billion in annual revenue demonstrates the sector's current economic weight and its untapped potential for growth. Jamaica's creative economy generates a conservatively estimated JMD \$107.0 billion annually (US\$690 million), representing 5.1% of Jamaica's JMD \$2.1 trillion GDP. This contribution significantly exceeds the global average of 3% and positions Jamaica among the world's leading creative economies alongside the United Kingdom and other developed nations.

The data points to specific, high-impact interventions that can shift the sector from incremental development to accelerated expansion. The most immediate opportunity lies in financing: 88% of practitioners require capital to scale, signalling a JMD 1–5 billion investment gap that, if addressed, could rapidly expand enterprise capacity, employment, and export earnings. Structural reforms also offer transformative potential; business registration alone could boost revenue by an estimated 81%, driving productivity and global competitiveness.

These findings show a sector that is self-aware, strategically aligned, and ready for scale. The survey reveals a sector poised for expansion, with 88.3% of practitioners requiring capital investment representing a JMD \$1-5 billion investment opportunity. The identification of business registration as the strongest predictor of economic success (81% income advantage) provides a clear pathway for immediate impact through formalization programs. Practitioner consensus on diaspora investment, creative infrastructure, and export development provides a clear policy agenda for government, investors, and industry actors.

The path for progress in the sector hinges on targeted financing instruments, simplified formalization processes, age-specific business support, and coordinated export initiatives will unlock the next phase of sector growth. With these strategic actions, Jamaica's creative industries can transition from emerging strength to global leadership, delivering increased GDP contributions, stronger cultural influence, and a more diversified, innovation-driven economy.

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**Note on Data Availability:** The primary survey data collected by Kingston Creative is available for academic and policy research purposes upon request. Researchers interested in accessing the raw dataset should contact the research team through Kingston Creative. All data sharing will comply with privacy protection protocols and ethical research standards.

**Links Verification:** All web-based references and links were verified as accessible as of October 2025. Given the dynamic nature of online content, some links may become unavailable over time. Alternative access methods and archived versions are available through institutional repositories and the research team.





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