Music and the Jamaican Economy

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Section I: The Jamaican music industry

Music has always been a central feature of the social and cultural life of Jamaicans. On the slave plantations, song provided the rhythm for work, the salve for feelings hurt by abuse, a form for collective prayer, and a medium for news for the ears of the slaves only. In the villages built by the ex-slaves, several forms of music developed to lighten the labour of farming, to teach children in schools, to give praises in Church, and to celebrate the anniversaries of life. Music as pure entertainment is a 20th century development associated with the growth of urban life in Kingston and the major towns. Today, music provides many income-earning opportunities as a sphere of economic activity itself.

Like the rest of the Caribbean, music is inextricably linked to the social and cultural processes by which the society reproduces itself. It describes and analyses the social processes of work, of play, of politics, of oppression and exploitation, and it expresses feelings of joy and sorrow, of the ups and downs of romance, and the full range of human emotions. Indeed, the same song may embrace more than one of these themes at the same time, being at once social critique and a love song, such as Bob Marley's "No woman, no cry.

Further, music invariably excites Jamaican people to dance, if only by the nod of the head in formal and polite circumstances, and/or stimulates call and response between the singer and the audience. Luciano[1]'s "Lord give me strength" will probably never play in public again without someone in the audience singing along. It is one of many popular songs since the 1960's that have become embedded in the collective memory

[1] Luciano is currently one of Jamaica's most popular singers, both locally and internationally.

and consciousness of Jamaicans, many of whom do not know who the songwriter was.

For the purposes of this study, it is convenient to periodize the history of the Jamaican music industry into three:

Period I: pre-1950 - before the recording of music

Period II: 1950-70 - production of recordings and live music for the Jamaican market

Period III: post-1970 **–** supply of recordings and live music to the international market

Period I

Prior to 1950, all music played in Jamaica by Jamaicans was performed live by groups or bands. Some were big bands and orchestras[2] playing Swing and Jazz from America for, and often by, members of the upper classes with more exposure to American culture than the ordinary Jamaicans. Some were Mento bands performing in village functions, clubs, and later in hotels to entertain tourists. Today Mento bands are almost exclusively heard in hotels. Other musicians were travelling troubadours, like Slim and Sam[3] who played on street corners and at festive occasions.

After World War II, most of the music played in Jamaica originated in the USA. According to Chang and Chen [1998], even though the first radio station, ZQI, came on the air in 1939, it was not until the formation of RJR (Radio Jamaica and Redifusion) in 1950 as a commercial radio station that music was heard regularly over radio. Even then, RJR had a strong bias for classical music, Country and

[2] For example, the Eric Deans Orchestra and bands led by artistes like Baba Motta and Sonny Bradshaw
[3] In the late 1970s, my father heard me playing Bob Marley's "Lick Samba", and pointed out to me that it was the same melody as Slim and Sam's, "Mile and a half fi go cut moono –".

Western music, and white American music (e.g., Bing Crosby, Perry Como, Patti Page). Stations like WINZ out of Miami played music that appealed more to popular preferences.

Then came the Sound System, a Jamaican innovation[4], and with it, came the dances[5] they played for in the 1950's. The Sound System combined powerful amplifiers with large speakers to play music at high volumes, with accents on the bass and the treble notes for dancing. The records were imported, primarily from the rhythm and blues and Jazz outlets in the USA. Songs were introduced by the disc jockeys, who in time developed the practice of embellishing the music with their own chants. This is the origin of the modern DJ.

The majority of the patrons of these dancers were people from the working classes. So too were the dance promoters, the vendors selling refreshments, and the operators of the Sound Systems.

Period II

Between 1950 and 1970, a recording industry and a small manufacturing sector producing mediocre to poor quality vinyl discs for the local market emerged and matured. The recording industry developed over these two decades with the technological changes – from 2 track to 16 track recordings – until it was sufficiently attractive to international artistes like Mick Jagger of the Rolling Stones. It was in this period that a distinctive Jamaican sound emerged which was centred around a beat that had evolved from Mento and other traditional forms such as, brukins, Pocomania, Quadrille, and Nyabingi drumming. It had been strongly influenced by the R&B and Jazz of Black America. Its modern forms were known successively as

[4] Garth White, SES, 1998

Ska (the first qualitatively distinct and identifiable popular beat from Jamaica), Rock Steady and Reggae.

Apart from a distinctive sound, a distinctive market emerged with unique products, such as dub plates[6] and "versions[7]". The distribution of records was concentrated among a few relatively (for the industry) large companies, but was also extended by many small, and some informal, enterprises. Apart from the distributor, the central figures of the fledgling music industry were the artistes, the producers, often performing multiple roles – financing, recording, promoting, managing -, and the promoters of dances and shows. As in many countries, the industry provided opportunities for the marginalized and for the small entrepreneur.

Instead of supportive public policy, the industry faced many obstacles from public policy, as those who formulated policy were both ignorant of, and insensitive to, the value of the industry to the economy and the society. Imported audio equipment and records were classified as luxury goods and consequently, attracted high duties. Dances were often disrupted or shut down by the Police because the noise level disturbed important citizens at night, or because the Police claimed to be in search of wanted persons. Most of all, there was no effective copyright protection for the creators, the owners and the performers of music.

In the 1970s, the success of Bob Marley and the Wailers, Jimmy Cliff and other Jamaican artistes on the international scene demanded recognition from the leadership of both the public and private sectors. But even now, three decades later,

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[5] The early name was the "Blues Dance", reflecting the pre-ska beat of Jamaican music.

[6] The "dub plate" is a 12-inch vinyl disc that is cut from a special version of a song for the exclusive use of a sound system.

[7] The version was the sound track of the song without the vocals that was put on the flip side of the record.

implementing policies and programmes to nurture the industry has remained a low priority on the agenda of policy makers. The industry was targeted as one of the new growth poles of the economy in the National Industrial Policy. However, it is macroeconomic stabilization policy – high interest rate, stable exchange rate and low inflation - and debt repayment that has occupied the attention of government policy makers. In this context, the music industry, like agriculture and manufacturing, continues to be overlooked by policy-makers, in their deeds, if not in their words.

Period III

In the early 1970s, Bob Marley, in particular, established Jamaican music in its Reggae form as a major genre of international pop music. Since then, the international market has been the major focus of artistes and producers, for whom the Jamaican market is the base or foundation of the international ventures. Producers began to shape the music for the international audience, with more polished recordings and better quality discs. Music produced in Jamaica faced not only competition in the international market from other genre of music, such as R&B, but also music inspired by Jamaican music but produced by non-Jamaicans for the "cross-over" market. Most of the major international record companies at one time or another have contracted Jamaican artistes.

The demand for high quality products by the international markets shifted production – recording and manufacturing – overseas as well. Top Jamaican artistes recorded overseas; their records, and later, their CDs, were pressed and distributed abroad; and they toured abroad to promote their work. This was in part driven by efficiencies derived from the rapid technological advances in the international music industry. Even as the Jamaican industry became uncompetitive in the musical products themselves – the records, CD's, videos – the Jamaican artiste and his/her musical ideas remained competitive. From an economic point of view, royalty payments to Jamaican artistes for the use of their musical creations became in this current period the substantive and sustainable form of hard currency income accruing to Jamaica. Despite the competition from the international record companies in the international market, the Jamaican industry remains competitive in the Jamaican market, more because of the uniqueness of its product, the Jamaican sound, than for the cost of production. The technological revolution in recording equipment has impacted on Jamaica and enhanced the capacity to record, but so far has had little impact on manufacturing. Further, while the capacity to record has mushroomed, there is arguably a decline in creative talent applied to the music industry that can generate quality material to be recorded[8]. The talent is no longer nurtured in music programmes of schools, and probably loses out in favour of activity that offers more immediate gratification and financial rewards.

It has long been obvious that the music industry contributes to the Jamaican economy by way of employment, income and foreign exchange earnings. The dimensions of the industry are not yet precisely quantified, and perhaps because of the fluidity of the industry, it is inherently immeasurable. Most challenging of all is to understand the dynamics of the industry, the underlying forces that drive it, and the ways in which they interact with each other. It revolves around a trio: the artiste, the producer, and

[8] This may not be true for people wanting to be DJs. Talent contests like the annual Tastee DJ contests attract hundreds of entrants. In 2001, the ages of the contestants ranged from very young to middle aged, and some had disabilities of various forms. There is an interesting informal process of filtering out young DJ aspirants with little talent in the eyes of the producers. Essentially, the process entails frustrating the young aspirant with delays and inaccessibility o the producer. Those who survive the process are deemed to have the toughness to succeed in the business.

the distributor, with the producer in the middle. It requires risky investments by genuine entrepreneurs guided by a vision of selling something "new" to an unprotected market. The music industry uses modern technology, with a product in global demand. This global demand cannot be assumed, but must be cultivated with aggressive marketing. The principal resource utilized is human creativity, and thus ownership of the rights to intellectual property is especially important.

Like bananas and coffee in the 19th century and ganja in the twentieth century, the music industry was created by the propertyless and the marginalized social groups of the society and has been used as vehicle for their own development. The typical artiste and musician in Jamaica, including the successful few, is from a poor economic background. As such, Jamaican song and music often expresses the resistance of the socially disadvantaged against their circumstances.

Like banana, coffee and ganja, the lion's share of the income of the music industry has been appropriated by "big business", and increasingly foreign business. Often, the social critique of the song casts the struggles between the artiste and the businessman as manifestations of the deeper struggles in the society. Prince Buster[9]'s song, "Black head Chiney", and Marley's song, "Small Axe", exemplify this.

[9] Prince Buster was one of the first DJs, and had a particularly strong influence in the development of ska throughout the 1960s, which was perhaps the first phase of modern Jamaican popular music.

Section II: The Markets for Jamaican Recorded and Live Music

As a fairly well defined sphere of economic activity in modern Jamaica, there are several interlocking markets for music goods and music services that can be clearly identified. In this study, these markets are classified in two broad categories: markets for final music goods and services, and markets for inputs of music services. Each category is further disaggregated into more concretely specified markets. **Table II.1** shows the market for final goods and services disaggregated into a market for goods and a market for services, each of which can be further disaggregated as the analytical need arises.

Table II.1 shows the buyers (Demand) and sellers (Supply) in each market in their roles in each market. However, it must be borne in mind that many individual persons and institutions play multiple roles in different markets simultaneously. The artiste who manages, produces, promotes, and distributes his own work is a classic case in point. More substantive, as we will see, are the distributors who also operate studios and pressing plants.

Table II.1: The Markets for (final) Music goods and services				
	Domestic market for all music		International market for Jamaican music	
ITEM	Demand	Supply	Demand	Supply
Retail				
CDs,LPs,45s,Cassettes of Jamaican music	Jamaican Consumers, Sound Systems	Record shops and outlets, sidewalk vendor	Caribbean consumers, Caribbean migrants, Foreign consumers	Jamaican Distributor/exporters, International record companies
CDs,LPs,45s,Cassettes of non-Jamaican music	Jamaican Consumers, Sound System	Record shops and outlets		
Audio and video equipment, instruments, unrecorded tapes and CDs	Jamaican Consumers, musician, Sound System, Studio	Music stores, record shops, other shops		
Wholesale				
CDs,LPs,45s,Cassettes	Record shops and outlets	Distributors		
Unrecorded tapes and CDs	Manufacturers	Importer/Distributors		
Live Music				
Dances, concerts, sessions, parties etc	Jamaican Consumers	Promoters		
Tourist entertainment cabaret, Reggae show	Tourists	Hotels, Clubs, Restaurants		
Tours			Migrant Jamaican consumers, Foreign consumers	Foreign Promoters, International Record companies, Migrant Jamaican promoters and Record companies

The market for goods divides naturally into recorded music on various formats, and all other music related goods, such as audio and video equipment and musical instruments. There is both a retail and a wholesale market in Jamaica for recorded (Jamaican and non-Jamaican) music, and for unrecorded media such as blank cassettes and CDs. In the retail market, Jamaican consumers and sound systems are the principal buyers, and music stores, record shops, and other recorded music outlets supply recorded music on all formats. The wholesale trade supplies the retail trade with imports and locally manufactured product.

More important is the international market for Jamaican music through which International record companies, some with Jamaican ownership and/or influence, supply product to Jamaican and non-Jamaican consumers. The main locations of international demand are North America, Europe, and Japan. Jamaican music is very popular in Africa, but piracy is rampant, and there is little hope at present of collecting royalties due to the owners of the rights to the music.

The retail trade in music related goods (as defined above) supplies Jamaican consumers with imports. The retail markets for recorded music, and for audio and video equipment are obviously complementary.

Table II.1 also shows the demand for live music by Jamaican dance and concert fans, by tourists seeking entertainment in hotels, clubs and restaurants, and by foreign audiences at the concerts and shows performed by popular Jamaican artistes on tours. Revenues from the sales of recorded music both locally and internationally, and from local shows and from foreign tours, ultimately constitute the source of all incomes in music and related activities. Put in terms of structure, the markets for recorded music and for live music, particularly the international markets, sustain all other markets in music goods and services.

Table II.2 show markets for services that are inputs into the production and distribution of recorded Jamaican music. For each market, the domestic and international sources of demand are shown and the suppliers are identified. The categories of markets identified are listed to suggest the hierarchy of activity from the creative idea up through the distribution of the creative idea as recorded music. Again, the categories chosen here conform to the analytical requirements of this study. In another instance, one may wish to refine some categories. For example, one may wish to break out professional services by type.

Table II.2: The Markets for inputs into the Production of Music goods and services

	Domestic market for all input services		International market for Jamaican inputs	
Input Service	**Demand**	**Supply**	**Demand**	**Supply**
Distribution services	Producers, Manufacturers	Importer/Distributors	Caribbean distributor	Jamaican Distributor/exporters
Manufacturing services	Producers	Jamaican Manufacturers	International record companies	Jamaican Manufacturers
Recording services	Producers	Studios	Foreign artistes, producers	Jamaican Studios
Sound/recording engineer services	Studios	Engineers and other technical persons	Foreign studios, especially studios operated by Jamaicans	Jamaican Engineers and other technical persons
Producer services	Artistes	Producers	Foreign artistes, studios	Jamaican Producers
Promotion services	Consumers	Promoters	Tourists	Jamaican Promoters
Sound System services	Consumers, Promoters	Sound Systems	Foreign Promoters, migrant Jamaicans	Sound Systems
Lighting, Stage management, emcee, security, and other services for live shows	Promoters	Various contractors with relevant skills		
Management and other professional services	Artistes	Various professionals		
Artiste services	Consumers	Artistes	Foreign consumers, International record companies	Artistes
Musician services, including arrangement	Producer, artiste	Musicians	Foreign artistes, producers	Jamaican musicians
Publishing	Songwriters, artistes	Publishers		

This study assembles the published estimates of the dimensions of the various markets of the music industry, and the activities that sustain them. These estimates are drawn from the few studies of the Jamaican music industry that exist, which are listed in the references of this study. The data from these studies is supplemented by information in newspaper reports, and by comparative data from international publications on the industry in the main international markets for Jamaican music. The data from these sources provide an empirical basis, albeit somewhat crude, for assessing the contribution of music to the economy of Jamaica. Interviews of persons with expertise in the various aspects of the business of music assisted in interpreting the empirical estimates. Much more needs to be done, and can be done, with sufficient resources and appropriate methodologies, to develop the knowledge base about the music industry to support informed public policy.

The Domestic Markets

Demand for CD's, and other music goods

The demand for recorded music in Jamaica by consumers is expressed directly as the purchases of CDs, records and cassette tapes, and is expressed indirectly as the demand for music broadcasts by radio, and for music played by sound systems and discos. The two principal sources of demand are households and sound systems, with some demand from foreign buyers. This last group is comprised of sound system and record store operators in the Eastern Caribbean, in the migrant communities of North America and Europe, and in Japan. Demand peaks during the weeks of public holidays, particularly at Christmas.

The demand for audio/stereo/video equipment and the associated peripherals is derived from the direct demand for recorded music. Simply, people with recorded music need equipment to play it, and many need equipment to record their own music. The **Survey of Living Conditions (SLC), 1998** reported data on the ownership of audio and video equipment by households in the various income groups and in three geographical locations in Jamaica. **Table II.3** reproduces the relevant data **[SLC. Table F17, 18]**.

Table II.3: Percentage, %, of Households owning audio and video equipment

	Jamaica	KMA	Other Towns	Rural	Quintile 1 (poorest 20%)	Quintile 2	Quintile 3	Quintile 4	Quintile 5 (richest 20%)
Radio/Cassette Players	68.1	61.4	70.1	72.5	62.1	69.8	70.6	71.1	69.4
Phonographs	0.3	0.6	0.1	0.2	0.1	0.4	0	0	0
Stereo Equipment	15.5	22.8	16.9	9.5	1.8	6.6	9.6	13.3	23.6
Video Equipment	21.5	25.9	25.8	16.7	3.9	11.3	15.5	21.6	32
TV sets	67.6	76.5	72.5	59.2	41.7	58.1	67.5	69.2	75.2

Source: Survey of Living Conditions, 1998, Table F.17, F.18

Notice that radio/cassette players were more frequent in rural households (72.5%) and in the "Other" Towns in the rural areas (70.1%) than in the urban households of Kingston (61.4%). On the other hand, the more expensive stereo equipment was more than twice as likely to be in a household in Kingston (22.8%) than in a rural household (9.5%). While few households reported having phonograph records, households in Kingston were three times as likely to have them as rural households and six times as likely as households in small towns.

In terms of income classes, notice that there is very little difference among the income groups in the frequency of ownership of radio/cassette player. But whereas 23.6% of the richest households (Quintile 5) had stereo equipment, only 1.8% of the households in the poorest quintile (Quintile 1) and only 6.6% of those in the second poorest quintile reported having stereo equipment.

All of which point to a broad demand for music across the country but particularly strong demand by urban upper income households, who can afford audio equipment. Curiously, video equipment was more popular than stereo equipment in all households.

The SLC has collected data on consumer expenditure on "recreation" for the years 1991 - 1998. We assume that expenditure on music falls in the category "recreation", since none of the other categories used by the SLC would be appropriate. It was reported that in the 1990s, expenditure on "recreation" declined as a share of consumption measured in both current and constant dollars [**see Table II.4**]. In the case of the latter, the share of expenditure on "recreation" in real consumption fell by almost a half over the course of the 1990s.

Table II.4: Recreation as a Percentage, %, of Total Consumption Expenditures

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Recreation as a % of Jamaican Consumption expenditure at current prices									
Jamaica	na	1.3	1.3	1.0	1.1	1.0	0.9	0.9	1.1
KMA								1.2	1.4
Other Towns								0.5	0.5
Rural								0.9	0.8
Recreation as a % of Jamaican Consumption expenditure at constant prices	na	1.3	1.3	0.9	0.9	0.8	0.7	0.7	0.7

Source: SLC, 1998, Tables 2.6, 2.9

With all expenditure by Jamaicans on recreation accounting for about 1% of current consumption, expenditure on music as a share of consumption was less than 1%. On a regional basis, there were significant variations, with households in the Kingston Metropolitan Area (KMA) reporting almost three times as much expenditure on recreation as households in "Other Towns", and almost twice as much as rural households. The share of recreation[10] in the expenditure of Jamaican households is surprisingly low, especially when compared to the USA where expenditure on music related items alone– radio, TV, records, musical instruments – accounted for a little over 9% of expenditure in 1990 [**see Table II.5]**.

[10] A colleague of mine has suggested that the estimates of expenditure on recreation may be low because computer-based home entertainment may be mis-classified elsewhere.

Table II.5: Expenditure (of money and time) by USA Households on Music

	1970	1980	1985	1990	1995	1998	2000
% of USA personal Expenditure on radio, TV, records, musical instruments	0.07	0.07	0.11	0.16	0.27		
% of time spent per year on recorded music in USA	2.6						9.1
% of time spent per year listening to radio in USA							
At Home							11.3
Out of Home							19.3

Source: Vogel, 2001, Tables 1.2, 1.4

The Supply of music goods

CDs and other music goods

The market for music in Jamaica is supplied with the full range of modern goods. In line with international trends, the dominant medium on which musical works is sold is the CD, but vinyl based products – LPs and 45s – are still important to sound systems and discos[11] and to music aficionados who prefer the sound of the music with the imperfections in the vinyl recordings to the clarity of the CD.

Yet another peculiarity of the Jamaican market is the sale of dub plates– specially cut acetate discs – used by sound systems. Cassettes are also still quite popular, particularly in the sidewalk market for recordings of dances, and for home recordings from radio programmes. In the case of big dances, within days of the event, cassette recordings of the show are on sale on the streets in the Jamaican communities in North America and Europe.

Whereas the RIAA reported that in 1995, 65% of the music sold in the USA was on CDs and less than 1% on vinyl [see **RIAA**, **Consumer Profile, 1999**], for the same

[11] Henceforth, the traditional term "sound system" will also refer to the modern equivalent, the "disco".

year a survey [**Watson, 1995**] of Jamaican suppliers suggested that CDs were only 33% of the Jamaican market. Since then, the share of CDs in the Jamaican market has increased, but there is a significant residual still accounted for by vinyl records. The **supplier of recorded music** is the retail store, which in turn is supplied primarily by three major distributors and to a lesser extent foreign record companies. In section IV below, **Bell's [1999]** estimate of 75 retail shops and outlets concentrated in the two major urban centres, Kingston and Montego Bay, is reported.

Music services

The principal **music services supplied** to consumers are live music concerts[12] and dances[13]. Live music shows in Jamaica refer primarily to concerts, and stage shows in clubs and hotels. The genre of music played at concerts includes dancehall, by far the most popular form, Soca, American R&B, Gospel, Jazz and the occasional performances of classical music and opera. By far, the biggest event is Sumfest, an annual international music festival featuring reggae music[14], which attracts thousands of visitors from all over the world. There are a couple of very small Jazz festivals, and the occasional concert by an American R&B or Gospel artiste. Also, there are major annual dance hall concerts, like Sting, Rebel Salute, and Saddle to the East, which attract people from all over Jamaica, from the Jamaican migrant communities, and from the hard core fans of Jamaican music as far away as Japan.

[12] The term "concert" refers also to what is traditionally called "stage shows", and covers all genre of music, including Gospel, Jazz, and Opera that are very minor components of the total market.
[13] The term, "Dance", refers to events in which the primary activity is patrons dancing to music usually supplied by a sound system, also called by synonyms, such as "session", and "pay party".
[14] The original festival was called Sunsplash, and was first staged in 1978. Sumfest was first staged in competition with Sunsplash in 1993. This severely weakened the Sunsplash organization, which had been plagued by financial difficulties. It declared bankruptcy in 1998.

Special mention should be made of the annual Carnival featuring Soca music. While Soca is the dominant music form for Carnival, up-tempo dance hall music played by sound systems with popular DJ's can be heard in some of the Carnival sessions. The Carnival began in 1990 as the promotion of Byron Lee, whose band had become a long time participant in Trinidad's annual Carnival. It is a month of 40 dances/musical events culminating in a week of revelling and road marches in early April. While it began with predominantly participation of the Jamaican middle and upper classes, the social character has broadened over time with more and more participation by people from the working classes. Over the years, the number of venues of activity has grown and the activity has spread beyond the boundaries of the Kingston and its suburban environs.

Dances

In the 1950s and 1960s, the "blues dance" was a well-established social event for the Jamaican working people. It had been institutionalised by great sound systems, such as Duke Reid's The Trojan, Sir Coxsone's Downbeat, King Edwards Hi-Fi, with legendary DJs like King Stitch, Count Machuki, and Prince Buster in famous dancehalls like Forrester's Hall, Chocomo Lawn, and Liberty Hall, the former headquarters of Marcus Garvey's United Negro Improvement Association. The middle classes organized house parties with small Hi-Fi and later, stereo sets playing American rhythm and blues and (white) rock music. There was very little mixing of the social classes on such occasions.

The 1970s saw broad sections of the middle classes accepting mass culture, and some elements began to promote it for various business reasons. Throughout the 1980s and 1990s, the blues dance evolved into the current form in which several featured DJs make short guest appearances, and in this way, the dance acquired a stage show dimension. At the same time, the house party gave way to the pay-party held at up-town locations, such as the big lawns of private homes, clubs and hotels. These events also used big sound systems[15] playing similar music to what one hears at the dances of the working classes. The influence of this working class recreational form, the "blues dance", or this form of socializing, on the middle and upper classes in the 1990s is unmistakable.

There is of course a plethora of income earning activities ancillary to the main musical event, whether it is the concert, the carnival, or the dance. Apart from the services required to set up the shows – promotional posters and radio ads, musicians, lights, sound, security, various specialized labour services, and so on – there are a variety of vendors of cooked food, fruits, refreshments, alcoholic beverages, cigarettes, souvenirs and other music related paraphernalia. Also of note is the expenditure on clothing and other articles of fashion that the dance and partygoers favour.

The **supplier of live music** is the promoter who contracts the services of artistes, bands, and Sound Systems; hires the venue, the lights and sound equipment; arranges the marketing; organizes the ticketing and the collections; contracts security services, and every other service required to put on the event. According to Mikey Bennett, songwriter and producer, artistes earn the lion's share of their income from live shows. Below, we present some typical fees earned by artistes of various levels from national, regional and international shows.

[15] As I recall it, the original "Disco" was a small-scale sound system that played primarily at house parties and clubs. Over time, many of them grew into major sound systems, though they maintained the name

There are, however, many other forms of entertainment, such as radio and TV programmes, fashion shows, plays, videos, and communication messages, such as advertisements and public information, almost all of which use music in their presentations and/or their backgrounds. Royalties for performers are due from the organizers of these forms of entertainment[16], and as will be shown below, efforts are now being made to document and collect payments for the use of copyrighted musical works.

The Tourist market

The **demand by tourists** is primarily for live music, directly from concerts and shows, and indirectly as a part of entertainment packages. In the era of All-Inclusive hotels, tourists access most of their entertainment in the hotels. Few tourists venture out to clubs frequented by Jamaicans, and similarly, few Jamaicans patronize the shows in hotels. The tourist market is therefore quite distinct from the domestic market for live music. Major events like Sumfest and Carnival are somewhat of the exceptions to the rule as these events target both Jamaican and tourist audiences.

Supply of music to tourists

Music is the integral component of entertainment provided for **tourists** in the hotels and clubs in the resort areas. Reggae music is one of the defining attractions of the “roots and culture” experience Negril offers to tourists. In the older resort areas, cabaret shows and mento[17] bands are more common. Indeed, reggae music has become an integral element of the principal image of Jamaica in the tourist market.

disco. For example, there was Gemini Disco, a major player in the sounds system arena for many years.

[16] It was reported that J$400, 000 (US$9000) in royalties was demanded by the collecting society JACAP from the promoters. The total estimated cost of the festival was J$30 million.

[17] Mento is a traditional form of Jamaican music that predates Reggae.

Demand for music services as inputs

The demand for **music services as inputs** is derived from the demand for recorded music and for live music.

Supply of music services as inputs

In terms of **inputs of music services** into recordings, there are the services of musicians, a wide range of complementary manpower services, such as the services of producers, arrangers and sound and recording engineers. In addition, there is the rental of studio time at US$16-40 per hour to make recordings.

There are far less bands and musical groups or aggregations today than 20 years ago. The Jamaica Film and Entertainment Commission web site lists 24, but this is certainly an incomplete list. People in the industry have offered several explanations for the decline in the number of musicians and musical aggregations. First, the pool of musicians has shrunk, primarily because the young people are not being exposed to music training. Music programmes in schools were the early victims of cost cutting. According to the Ministry of Education, there were 132 specialist music teachers in the secondary schools, but very few teachers specializing in music in the Primary schools. The Secondary school system had about 240,000 students, of which about 78,000 were in High schools[18]. In 1999, only 20 students sat the CXC[19], and 15 passed. At the Tertiary level, annual enrolment at the Jamaica School of Music is only about 25 students.

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[18] **Economic and Social Survey, 2000**, P.22.9

[19] The Caribbean Examinations Council offers examinations in a wide range of academic and technical subject areas to students completing secondary school.

Second, it has also been suggested that today's young people prefer to entertain themselves with the computer rather than put out the effort demanded by learning and playing music[20].

Third, technological development – in particular, sampling – and the central role taken up by the computer in the industry has reduced the demand for music played by bands.

Fourth, the business challenges of even maintaining a band, much less making it a successful business venture, have increased sharply in the context of the country's economic difficulties. Band music, however, remains central to the Jamaica Carnival and the Soca dance circuit, and to a lesser extent, shows featuring "Oldies", the so-called vintage music. Band music is also popular on the Gospel circuit, but many of these bands are not full-time professional entities but appear to come together for shows and other big occasions.

Over 150 sound systems are members of the Sound System Association of Jamaica. In 1998, Bell estimated that there were 170 active sound systems. Some of the larger organizations operate several sets. In an interview with the Gleaner, Stone Love's Wee Pow said that his organization operated three sets, which equipped them to play at several dances simultaneously. He was speaking on his return from a Stone Love tour in Europe. Sound Systems frequently play in major North American cities with large Jamaican communities (e.g., New York, Miami, Chicago) using equipment rented at the location.

[20] Nike is said to have observed that Bill Gates' Microsoft is its principal competitor, intimating that the computer is attracting more of young people's attention and energies than sports. Perhaps the same is true for music.

The size of the market for recorded music

The market for recorded music in Jamaica – both Jamaican and non-Jamaican music - is quite small, in contrast to the international market for Jamaican music, which is quite big. [**Watson, 1995**] reported that a CD of Jamaican music that sold between 5000 and 18000 copies [in Jamaica] was considered successful. Five years later the Head of one of the major music companies was quoted as saying, "---a CD [of Jamaican music] selling 5000 copies in the Jamaican market would be considered very successful" **–** [**Patrick Roberts, Head, Shocking Vibes Productions – Gleaner, 28.7.2000**]. Even so, sales were down in 2000 by 50% compared to 1999, according to a leading retailer. **– [Derrick Harriott, Gleaner 28.7.2000]**. These estimates are much lower than the 40,000-50,000 units sold for a hit in the 1980's. **[Jason Lee,** Nov. 1998**,** cited by **A. Davis, "Strategic Plan---"].** One of the two biggest record companies and a major distributor, Sonic Sounds, closed one retail outlet, and was struggling to keep the other open [**Balford Henry** interview with **Gordon Lee**, **Gleaner**, August 27, 2000]. It appears that there was a major contraction of the domestic market between the 1980's and 1990's.

Official data on imports published in STATIN's External Trade, 1998, showed that the total value of recorded CDs, cassettes and vinyl disks (45 and LP records) imported into Jamaica was US$ 304,000. Of this, US$300,000 paid for approximately 62,000 CDs, or US$ 4.83 per CD.

The IFPI's estimate of sales of Jamaican music (on the Jamaican market) in 1999 was US$3.2 million, down from US$6.6 million in 1998. "Sales figures for 1999 showed: 600,000 vinyl singles, 300,000 vinyl albums, 200,000 cassettes and 100,000 CDS. This compares with 1998 figures of 800,000 vinyl singles, 800,000 vinyl albums, 500,000 cassettes and 300,000 CDs" **– [Balford Henry, Gleaner 27.8.2000].** These estimates suggest a sharp decline, more than 50% in sales in one year, with the decline in CD sales being the greatest for all formats. Indications are that the trend of decline continued into 2000 by another 10-15%.

Three points needs to be noted about these sales figures that are submitted annually to IFPI based on information collected by IFPI's agent in Jamaica. First, informed opinion is that these estimates are low, which means that in 1998 the domestic market could have been as large as 1 million CDs. Second, the decline in sales may overestimate the decline in consumption of CDs as some of the decline was offset by pirated copies. Third, some of the domestic sales actually end up abroad as unrecorded exports.

In addition, US$9.6 million of audio equipment and musical instruments were imported. Together, sales of music goods were approximately US$11.2 million.

Part of the explanation for the decline in the market for records and CDs is the widespread use of tape recorders and nowadays, CD writers, to make copies. One record store manager said she sold "tens of thousands" of CD blanks last year. In a feature article in the **Gleaner of March 23, 2001**, it was reported that pirated CDs are sold for about a half of the price of the original CDs. One seller reported that he earned about J$4000 (US$ 88) per week, much more than he could earn as a construction worker.

Another part of the explanation has been the weak purchasing power of the population in two decades of virtual economic stagnation. Data cited above on the decline in the share of consumption expenditures on music supports this impression.

Despite the small size of the domestic market, it has a qualitative importance to the potential of a recording to be successful on the international market. A recording that sells well in Jamaica acquires a stamp of social approval that increases its attractiveness to the ethnic markets overseas, and in turn to the wider market for Jamaican music.

The size of the market for Shows and Dances

Table II.6 lists a selection of the major annual dance hall concerts, estimates of attendance and revenue. This information was extracted from various issues of **The Gleaner** and **The Observer** newspapers in the year 2000, and interviews with promoters

Table II.6 - Selected Sessions on the Jamaican Dance Calendar

Name	Promotion	Month	Size of Crowd	Entry Fee	Estimated Revenue, J$ millions
Rebel Salute	Tony Rebel	January	25-30000	$500	12.50
Splurt	CD entertainment	February	1500+	$500	0.75
	John Greaves	April	1000	$2000	2.00
Frenchmen	Frenchmen	April	2000	$2000	4.00
Carnival		April	40000		50.00
	RAS	June	4000+	$500 presold $600 at gate	2.00
Ratio 3:1	Baracatt & Bad Company	June	3500+	women presold $800 men presold $1200 Gate - $1500	3.50
	Pip 'n' Ting	June	4000+	Presold -$1500	6.00
	Council	June	800-1000	$1200	1.20
Great adventure	Yes Concepts	June	2500+	Presold -$500 Gate - $700	1.25
Clock strikes	Solid Agency	June	1500+	Presold - $500 Gate - $600	0.75
Bounty Killa's Birthday	Bounty Killa	June	4000+	$600	2.40
	John Greaves	July	1000	$2000	2.00
Fully Loaded	Solid Agency	July	10000	Presold - $500 Gate - $700	5.00
Sashi	Sashi	August	2500+	Presold - $1500 Gate - $2000	3.75
Reggae Sumfest	August	August	30000	$1200	30.00
Murphy Hill		August	1500+	presold - $800 gate - $1000	1.20
Frenchmen	Frenchmen	August	2000	$2000	4.00
Nightmare	Baracatt & Bad Company	November	3500+	presold -$800 Gate -$1200	3.50
Delano's Revenge	Delano Thompson	November	3500+	presold -$400 Gate -$600	1.40
	Council	December	800-1000	$1200	
Overloaded	Solid Agency	December	3000+	Presold - $500 Gate - $700	1.50
Reloaded	Solid Agency	December	3000+	Presold - $500 Gate - $700	1.25
Saddle to the East	Bounty Killa	December	9000	$500	5.00
Sting	Supreme Promotions	December	4000+	presold - $600 gate - $800	2.40
Superjam	Pulse	December	2000+	$1000	2.00
New Year's eve		December	1500	presold - $3000 gate - $3500	4.50
Splurt	CD entertainment	December	1500+	$500	0.75
Frenchmen	Frenchmen	December	2000	$2000	4.00
	RAS	December	4000+	$500 presold $600 at gate	2.00
Theme Party	Pip 'n' Ting	Monthly	800-1000	Men - $400 women - $300	0.35
				TOTAL	160.95

Conservative estimates for the revenue earned from these events in a year is J$160 million, and probably more than J$200 million for all dances, stage shows, concerts, pay parties and such events.

There are three main periods during the year for dances at which music is supplied by sound systems: Easter weekend, the summer months of July and August, and 2-3 weeks at Christmas. Kingsley Cooper, a long established promoter, in an interview with the author, estimated that on these peak weekends, there were 8-10 major parties/dances/sessions, for a weekend average of J$8-10 million. The big events gross up to J$4 million in revenues. Assuming 14 such weekends, the annual expenditure on this form of entertainment is approximately J$112 –140 million (US$2.5 –3 million). If the smaller dances and functions – house parties, weddings, - are included, the figure could well be of the order of J$200 million annually. This is consistent with the estimate in **Table II.6** above.

Some large hotels spend as much as J$10 million (US$200,000) per year on entertainment – [**J. Silvera, Gleaner, 20.10.2000**] "Industry analysts state that the hotel industry alone spends approximately J$50-60 million per year on music and that the foreign component for overseas shows amounts to over J$60 million (US$1.3 million)." [**L. Nicholas, Gleaner, 26.1.2000**] These estimates appear to be low in light of new information supplied by one major hotel chain. Based on expenditure on live music by a group of hotels with about 35% of the tourism market, the hotel and nightclub operators spend around US$12 - 15 million per year on live music.

Taken together, the revenue earned from concerts, shows, dances, pay-parties and other such music events is probably of the order of J$800 - 900 million (US$16-19 million) per annum. Add to that the estimated US$15.5 million of music goods, the total value of the Jamaican market for goods and services was of the order of US$31-35 million (J$1.4-1.6 billion), or about 10% **as a percentage** of GDP[21]. For comparative purposes, note that in 1999, agriculture contributed 7.4% of real GDP, and electric light and power contributed 4.8%.

The International Market for recorded music

There are crude estimates of the size of the international market for reggae/Jamaican music. **Kozuł Wright and Stanbury, 1998**, estimated that US$450 million of income accrued to Jamaicans in 1996.

> "---it is reasonable to estimate that the worldwide income from recorded reggae music was not below 3% of the global income. This implies that if in 1996 the global income generated from sales of all recorded music was US$40 billion, it could be reasonably deduced that reggae generated approximately US$1.2 billion[22]. With a conservative estimate that Jamaican performers, producers and songwriters account for approximately 25% of this amount, it is estimated that for 1996 earnings from Jamaican recorded music amounted to US$300 million. In addition, earnings from concert tours, ancillary merchandise and production services, as well as the export and other international sales of vinyl recordings through networks not captured in the data provided in the above markets, need to be taken into account. The estimated value of these untracked activities approximately amounts to US$150 million, resulting in a total of US$450 million in 1996." [P.24]

The estimate that "reggae" generated 3% of world sales seems high for 1996, and is definitely too high for 2000. At an average of US$15 per CD, US$1.2 billion of sales is equivalent to 80 million CDs. Shaggy's current super hit has sold 6.5 million

[21] This figure should be interpreted carefully. It is not saying that music contributed 10% of GDP. Rather, it is saying that the gross revenues from music and music related activities were equivalent in size to 10% of the GDP.

copies. This means that there would have to have been about 12 such hits in 1996, which is not plausible.

Certainly in 2000, there was no such super hit. Some of the successes in recent years, like Shakademus and Pliers and Beenie Man, had albums with sales of 50,000 or less. If we assume that the major international record companies would sign artistes with potential sales of 100,000 or more, then the paucity of Jamaican artistes with contracts with the major international companies indicates the relatively low volume of sales of music by Jamaican artistes.

According to estimates by the National Endowment for the Arts [**NDEA, 1993]**, there were 49 million reggae fans [**Lloyd Nicholas, Gleaner, 26.1.2000]** and at US$46 per capita [**IFPI**], this indicated that the international market for reggae was US$2.5 billion per year.

The popularity of reggae has certainly waned since 1993, with a decline in both the number of fans and the annual per capita expenditure on reggae. According to **Kozul-Wright and Stanbury, 1998**, "Recent trends (1995-1998) indicate a decline in reggae sales and tours in all major music markets." [P.24]. They cite several factors for the decline:

- Cyclical decline in music sales in most music genre
- Breakdown in relations between major USA companies and leading Jamaican artistes due to unprofessional behaviour by the artistes and the inflexibility of the companies.

[22] Bourne et al, 1995 "estimated the global market value of reggae is US$ 1.2 billion per annum.", cited by Kozul-Wright and Stanbury, P.22

Again, US$2.5 billion of sales was equivalent to about 170 million CDs, which seems far too high.

RIAA estimates of the composition of the USA market for music for the 1990's indicate that the category, R&B/Urban, which includes Reggae, has been increasing through the 1990s. In 1999, it was US$1.5 billion or 10.5% of the USA market, down from the estimate of US$1.8 billion, or 12.8% of the USA market in 1998 **[RIAA, 1999 Consumer Profile].** By this estimate, reggae sales in the USA would surely be less than US$1 billion. Indeed, Reggae is certainly less than half of the category, R&B/Urban, and more likely of the order of 10-15%, or US$150-200 million for 1999. This would be equivalent to 10-15 million CDs.

If we assume 25% of this estimate of sales to be income to "Jamaican performers, producers and songwriters", income accruing to Jamaicans from sales of recorded music would be of the order of US$40-50 million. If we further assume the same proportion as **Kozul-Wright and Stanbury,** between sales of recorded music to the "Value of untracked activities [tours etc]", we could add another US$20-25 million to the sales of recorded music for a total international market of US$60-75 million, with an upper limit of US$100 million.

By way of comparison, **Kozul-Wright and Stanbury's** estimate of the income (US$450 million) accruing to Jamaicans was equivalent to about a third of the total export earnings of Jamaica in 1996, and as a single category of export, it was exceeded only by the earnings of the mining sector (bauxite and alumina). This study is more comfortable with an estimate for 2000 of the order of US$60-100 million, which would make it more important to the Jamaican economy than sugar as a foreign exchange earner.

Section III: The Recording Business

Stanley Motta’s recordings of mento music in 1951 marked the birth of the Jamaican recording business. Soon after, others like Seaga’s West Indies records and Ken Khouri’s Federal Recording, would follow. Motta’s tapes were sent to England to be pressed into 10 inch 78 rpm discs [**Barrow and Dalton, 1998**, P.8]. Twenty years later Khouri’s studio would become technologically sophisticated enough (16 track) to host many international artistes including Mick Jagger, Herbie Mann, Cat Stevens, Roberta Flack, and Eddie Kendricks in search of the Jamaican sound [**Chang and Chen, 1998**]. Today, 30 years later, 24 track recording capacity is common and there is even the capacity for 72 track digital recording at Shocking Vibes studio.

In the last 5 years, studio capacity in Jamaica has grown rapidly with the spread of digital technology that makes it possible to establish home studios[23]. The growth of home studios has cut into the demand of the commercial studios, but the big 20 are still doing quite well [“booked out”[24]]. One studio operator claims that many commercial studios are not viable as stand-alone commercial entities, but are kept open by owners who are themselves producers of their own music, and to provide special services such as voicing by groups[25]. **Watson, 1995** estimated that there were “--- 30 or so studios listed in the **Yellow Pages**, but industry sources say that it is about 50 or so” [P.19]. In 2000, the **Yellow Pages** listed 25 studios, the **Encyclopaedia of Jamaican Music** listed 34, but industry sources estimates vary from 75 to more than 200 if home studios are included.

[23] Whereas in the 1980s, a home studio cost upwards of USS$70,000 –tape machine, mixing console and outboard gear – today US$40,000 can buy a fully professional system {Clunis, Gleaner, Feb. 23, 2001]

[24] Interview with Ibo Cooper, formerly leader of Third World Band

[25] Interview with Niels Peter Blake, Kingston Music

Many of these studios are quite modern, having been established in the last 5 years or so. However, most Jamaican studios are still technologically far behind the big commercial studios in the USA, and the technological gap between Jamaican and USA studios has probably widened in the last quarter of the twentieth century.[26] In addition, there is a shortage of trained technical personnel – sound and recording engineers – to keep the studios operating and maintained efficiently.

The drive for independence from the producer, the commercial studio, and the recording company has led many musicians to reinvest some of their income in studios and recording equipment. Frequently, they flounder at the point of distribution of the final product because of inadequate business knowledge and the inability to match the bargaining power of the distribution companies.

The Head of Intellectual Property Services, and one of the principal founders of the Jamaica Performers Administration Society (JPAS), estimates that more than 200 recordings are released each week. [**Tony Laing** quoted by **Andrew Clunis**, **Gleaner**, 21.3.2000]. Of course, many are laid on the same rhythm tracks.

Employment

The Jamaica Federation of Musicians is reported to have over 2000 members. If we take account of musicians who are not members, an estimate of 2500 practicing musicians, full and part-time, seems plausible.

Studios vary in size and level of activity, relying primarily on contracted skilled labour. If we assume that there are 75 commercial studios with an average direct employment of 6, and 125 home studios "hiring" 1 person, a crude estimate of direct employment in recording is 575 – 600 persons.

[26] Ibid

Bell, 1998, estimated that the average employment in retail stores was 6, with 47% of the stores hiring 3 or fewer workers, and 41% employing between 4 and 9. With 75 establishments hiring an average of 6 workers, retail employment was approximately 450 persons in 1998. Together with the wholesale trade, the distributive trades probably accounted for 500 jobs.

Sound Systems vary in size, but even the smallest systems travel with a crew of at least 5 people, while the biggest will have 20 or more. If we use an average of 10 people per sound system, and accept Bell's estimate of 170, there are probably 1700 people employed[27] more or less regularly, by sound systems.

The most common form of employment in the music industry is the independent contractor. There is a small pool of highly skilled technical persons, such as recording engineers, lighting and other electrical technicians, who work on a project basis. There are probably 200 such persons.

If we assume that all other occupations account for 500 jobs, then the total employment for the industry would be of the order of 6,000, a little less than a half of the 15,000 persons estimated to be employed in entertainment related occupations [**JAMPRO, Marketing** --]

It is reasonable to assume a 1 to 1 relationship between direct and indirect employment in the industry[28]. That is, each job in the music industry created 1 job elsewhere in the economy – retail trade, transport, construction, for example. In which case, the industry provides employment and/or income for about 12,000

[27] Some of the occupations in the sound system are: owner/manager, selector, DJ, audio technician, equipment handler

persons. This is equivalent to the total employment of the mining industry and the utilities.

With a mean household size for Jamaica of 3.56, 12,000 employed people would be responsible for another 30,720 persons[29]. In all, these estimates suggest that the music industry directly supports approximately 43,000 persons, or the equivalent of 4.6% of the employed labour force in 2000. Many of these persons have limited skills acquired through formal training, and as such, the music industry is a more important source of employment for people with limited formal skills than the share of the industry's employment of the employed labour force (4.6%) indicates.

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[28] This assumption was used for years in Jamaica to estimate the employment in tourism. In the absence of empirical estimates of the relationship between direct and indirect employment in music, this seems like a reasonable assumption.

[29] This estimate assumes that each person who earns income from music and music related activities contributes to his/her household, but it does not assume that he/she is the only provider. In addition, the social origins of many persons who work in the music industry suggests that the average household size of the families of these people may be higher than the national average household size. In which case, the estimate of the number of persons depending on the industry will be higher.

Section IV: Manufacturing and Distribution

Manufacturing

There are seven (7) manufacturers of records, 6 of whom also manufacture recorded cassettes[30]. A study done for JAMPRO[31] in 1996 reported that 3 of the major manufacturers had the potential for a monthly output of 52,000 LPs at a cost of US$0.82 per LP, 26,2000 45s at US$0.44 per 45 rpm record, and 100,000 cassettes at US$0.85 per cassette. The capacity varied significantly across the three firms. The largest had 2 of the 4 presses to manufacture LPs with a total of 6 times more capacity than the second largest firm, and 8 times the capacity of the third largest firm. Similarly, the largest firm had 12 of the 20 presses for 45 records, with more than 20 times the capacity of the other two firms. These plants are quite old, but are kept viable by a persistent demand for vinyl formats.

In the production of cassettes, only two companies were significant, and the smaller company in this case had more than 4 times the capacity of the largest firm.

There is one (1) plant in Jamaica capable of manufacturing about 50,000 CDs annually, about 50% of the total sales in 1999 according to the RIAA. It really replicates "mother" CDs that are made abroad. Most of the CDs are manufactured for Jamaican clients and are sold on the local market.

Based on information provided from the actual production of a CD, it appears that it costs about US$2.00 to manufacture a CD in Jamaica. According to [**Vogel, 2001**], it costs a little less than US$1.00 to manufacture a CD in the USA. All equipment and material inputs for CD manufacture have to be imported into Jamaica. It is clear that

[30] One of these companies is Tuff Gong, which was legally wound up during this study. However, there is still some continuity in the form of Tuff Gong International.

there would have to be significant investment in a plant with modern technology before Jamaica could become competitive in the manufacture of CDs.

Distribution

The Wholesale and Retail Trades in Jamaica

The wholesale trade in imported and locally manufactured CDs, records, and cassettes is concentrated among three companies which also operate their own studios, their own retail outlets and their own manufacturing facilities. The biggest of these three companies also has the greatest manufacturing capacity. These big three distributors supply the majority of the music sold in retail stores at mark-ups estimated to vary between 69% and 155% [**Bell 1998**]. All the firms identified by Bell were supplied by the local distributors and a little more than a half of them (53%) sourced all their product through these distributors.

In the era of vinyl, much of the foreign music was actually pressed in Jamaica and distributed under exclusive license by the major international labels.

The principal means of distribution of recorded music domestically is a network of record shops and music stores in the urban centres, and particularly, in Kingston, and racks in pharmacies and specialty shops throughout the country. **Bell, 1998**, estimated that there were about 75 such shops in Jamaica. This was based on his own identification of 50 such establishments, 36 of which were stores specializing in music, and 14 of which were other kinds of stores that also sold some music. In Bell's sample, 65% of the retail stores were stand-alone stores and the remaining 35% were branches of a chain of stores or a network of companies.

[31] See, Marketing Music for the 21st Century

The **Yellow Pages, 1999 – 2000,** lists 30 retailer (record shops) and 7 manufacturer-wholesalers. Some of the retailers are outlets for the manufacturing plants operated by the major Jamaican record companies.

These companies are also the major importers with franchises for the major international labels. **Lawrence [1992]** estimated that the volume of sales of foreign records was 3.5 times the volume of sales of local music, with foreign LPs, in particular, selling 10 times as many as local LPs. In a telephone survey of 13 record shops, including the major ones, managers[32] were asked what proportion of sales were foreign artistes. Of the 13 stores, 10 reported that more than 40% of their sales were CDs by foreign artistes, and for 7 of these, more than 60% of sales were foreign artistes. Of the 11 managers responding to the survey, only 4 would hazard a guess as to the size of the total Jamaican market for CDs, and only one estimate (500,000) seemed remotely plausible[33].

The sidewalk vendor of the 1960s and 1970s sold 45s, some of which were pre-releases used to test the market response to the new sound. Today, this vendor sells cassettes of recorded dances and concerts, and special mixes of songs, as well as pirated CDs. This phenomenon serves to market the DJs, in particular, among dance fans, which in turn increases the demand by Sound Systems for "specials" cut on dub plates[34]. A special can cost a Sound System as much as US$1,300. An artiste can earn quite a bit from doing specials for several Sound Systems and appearances at dances.

[32] In 2 instances, the person answering the question was a clerk.
[33] One manager estimated that 100 million CDS, about 40 per capita, were sold each year!
[34] This observation is due to Tony Laing, JACAP.

Section V: Foreign Trade

Official data are widely acknowledged to be well below the true values since these types of goods pass as personal baggage easily and frequently through the Customs without being registered. Nevertheless, the data suggests a structure and direction of trade that is quite typical for the economy as a whole.

- The value of imports was much greater – 6-7 times in 1998, and 9-10 times in 1999 – than the value of exports
- Imports are comprised of capital goods (80%), intermediate goods (10%) and finished goods (10%). Exports consist entirely of finished goods.
- The main sources of imports are the USA, Canada, Europe and Japan. The main markets for exports of CDs are USA, Canada, and Europe. The main markets for records (vinyl disks) are the Caricom countries.
- The unit cost of Jamaica's CD exports is 76% higher than the unit cost of imports of CDs. In the case of records, Jamaica is quite competitive, with LPs being exported for less than 50% of the unit cost of imports of LPs, and 45s being exported at 10% more than unit import costs. Of course, this latter advantage will not be significant for long as the markets for records are shrinking fast.

Imports

Table V.1 presents the official data on trade in musical products for the years 1998 and 1999.

Table V.1: Jamaica: Music Exports and Imports, 1998, 1999

	1998				1999			
Category	Import, J$ mns	Export, J$ mns	Import, US$ mns	Export, US$ mns	Import, J$ mns	Export, J$ mns	Import, US$ mns	Export, US$ mns
Audio-equipment	321.500	0.040	8.765	0.001	516.23	0.00	13.13	0.000
Instruments	29.900	0.070	0.815	0.002	20.74	0.00	0.53	0.000
Tapes, records, CD's etc	57.954	8.070	1.580	0.220	68.83	0.00	1.75	0.000
Total Music	409.35	8.180	11.160	0.223	605.80	0.000	15.403	0.000
Total Music as a % of Total Imports	0.0004	0.00002	0.0004	0.00002	0.0005	0.0000	0.0005	0.0000

Source: STATIN**, External Trade,** 1998, 1999 (provisional)

All audio equipment and most musical instruments[35] are imported. In 1998, official import data reported that US$ 8.8 million of audio equipment, US$ 0.8 million of instruments and US$ 1.6 million of CDs, records and cassettes were brought into Jamaica. In 1999, imports of audio equipment rose by 49% to US$ 13.13 million, imports of instruments fell by 54% to US$ 0.5 million, and imports of CDs, records and cassettes rose by 11% to US$ 1.75 million. Further, we must note that there is local manufacture of foreign music under license from international record companies. In these cases, instead of the finished product, a "mother", and the materials needed to replicate it, are imported.

Exports

Official trade data for 1998 and 1999 report that Jamaica exported 775 and 1808 CDs respectively. The biggest export item was 45 records, which fell from US$ 132,000 in 1998 to US$ 88,000 in 1999, a decline of 50%. Again, this is perhaps an underestimate of the actual CDs shipped since it does not account for the informal

[35] Some traditional drums and percussions instruments are made from local materials.

trade – foreign (e.g., Japanese, Caribbean) buyers coming to shop for CDs in Jamaica, and travellers taking CDs abroad for a price[36]. Even so, the main point is that exports of finished product (goods) are marginal.

It is much more common for "masters" to be sent to a small number of medium to large record companies in the USA, Europe, and Japan for further mastering and pressing into CDs[37] than to export locally manufactured CDs themselves. The major distribution occurs overseas, with a portion reserved for the domestic market so that the artiste and the producer can maintain a presence in the Jamaican marketplace. Thus, the bulk of the "export" income from music takes the form of **fees** to performers and technical personnel, and **royalty payments** to the publisher, the artistes, and to the backing musicians, rather than revenue from the sale of the CDs. Sales data, by the major distributors of music originating in Jamaica (as opposed to Jamaican music originating from Jamaicans normally resident overseas, or from non-Jamaicans) is not available to this study. Reggae music is also produced for the international market by Jamaican artistes living and working abroad and by non-Jamaican artistes (e.g., UB 40). Not only do industry data tend to include reggae in larger categories, such as R&B in USA data, but also, it is not likely that a distinction could be made in this data between artistes from Jamaica and artistes recording Jamaican style music.

[36] There is a regional trade in Jamaican music CDs conducted by small traders (called "Higglers" in Jamaica, "Hucksters" in Dominica and "Traders" in Guyana). Jamaican traders travel with CDs to the Eastern Caribbean, and Eastern Caribbean traders travel to Jamaica and buy CDs for the return trip. Lawrence [1992] estimated that 12,000 records per month were being shipped by couriers to Japan.

[37] Masters produced in Jamaica and sent to be pressed into CDs abroad for re-import into Jamaica can now pay duty on the cost of manufacture abroad, and not the retail price of a CD.

This study focuses on music supplied by artistes normally resident in Jamaica (which is not always easy to determine). Disaggregated data on CD sales in the major foreign markets for Jamaican music – USA, Canada, Europe, Japan – would allow us to estimate the royalty income earned by Jamaicans. Data on airplay in the major markets will allow for calculation of royalties due to performers for the use of their works in public.

In the USA, the main record companies that handle Jamaican music are VP records, which distributed records for over 200 Jamaican artistes, Shanachie, Heartbeat and RAS records. There are still a few Jamaican artistes signed to major USA recording companies – Shaggy to MCA, Beenie Man to Virgin, and Beres Hammond to VP records.

In Europe, the main record companies handling Jamaican music are Jetstar, and Greensleeves. The Greensleeves catalogue lists about 80 Jamaican artistes.

There are, however, many independent companies and sole operators in both North America and Europe handling reggae music primarily for the Jamaican communities abroad.

International Tours

For Jamaican artistes, performing in live shows abroad is both a form of promoting their music and a source of income in hard currency. Of course not all tours are successful. There are many stories of artistes who do not get paid their contracted fees, and reports of artistes not showing up for engagements. There also stories of artistes getting paid and not delivering on their commitments to their backing musicians and other members of their entourage.

However, we have some informed estimates of the range of incomes earned by artistes for performances. **Table V.3** shows the income per show earned by artistes in Jamaica and in foreign countries.

Table V.3: Selected estimates of Fees in the Music Industry

	US$
Studio rental per hour	16-40
Studio musicians: per track	500
Producer/engineer per song	50,000
Payment to Major artistes by Major record companies per album	170,000
Payment to other artistes by Major record companies per album	100,000 - 125,000
Local Shows	
Artiste per show	220-2200
Back-up musicians per show	110-180
Caribbean Shows	
New Artiste per show	3000-5000
Top artiste per show	10,000-15,000
USA & Europe Shows	
New Artiste per show	6000
Top artiste per show	18,000
Japan & Brazil	
New Artiste per show	1,500-3,000
Top artiste per show	9000

Source: JAMPRO, "**Marketing Music for the 21st Century**", February 1996

Fees are surprisingly higher in the Caribbean than in Japan. In a 3 week tour of Japan a top artiste could gross US$70,000.

A major artiste performs at least once per month and for periods of the year he/she may perform as often as once per week. At a minimal rate for a top artiste of one live performance per month, annual earnings would be of the order of US$300,000. Top artistes like Shaggy, Beenie Man, Buju Banto, and Beres Hammond can earn between US$500,000 and US$1 million annually from shows.

As noted above, there seems to have been a significant decline in the number of artistes on tours, particularly the minor ones, and the frequency of tours in the last 3-5 years.

Section VI: Income Flows in the music Industry

The flow of incomes in the music industry, as in any complex of economic activities, is in the opposite direction to the flow of goods and services. **Figure 1** [**see End**] shows the flow of goods and services from the creative idea of the composer/songwriter through to the final product in one direction (black arrows), and the reverse flow of payments (red arrows) to the providers of the inputs of goods and services used to produce the final goods and services, and particularly the artiste holding the copyright.

Ultimately, all forms of income paid out by the industry are derived from:

- consumer expenditure, in Jamaica and abroad, on CDs, vinyl disks, and live shows and dances,
- advertisers' purchases of jingles,
- payments for sound track music for films and videos, and,
- payments for public play, such as radio and TV.

Retailers, wholesaler/distributors, manufacturers and promoters earn **profits** after paying **wages and salaries, interest on loans, rentals**, and the costs of other inputs. Songwriters, artistes, musicians and publishers earn **royalties** and **fees**. Other technical and professional persons also earn **fees** for services supplied. In Jamaica, many individuals and their organizations in the business of music play multiple roles, and accordingly receive several forms of income that in practice may not be separable.

Unlike most other industries in Jamaica[38], royalties constitute an important part of the total incomes paid out. The amount of royalties accruing to Jamaicans holding various rights to music produced in part by them is directly determined by the revenue from the sales of the music and from the amount of airplay of the musical work. The percentage of total royalties accruing that is actually collected is determined by the enforcement of strict copyright legislation and the institutional capacity to collect. Because of the historically underdeveloped legal and institutional capacity in Jamaica, the percentage of royalties accruing to Jamaicans that is actually collected is known to be ridiculously low. In 1999, the last year of its existence in Jamaica the Performing Rights Society, which for 64 years was the sole collecting society, reported collections of approximately US$2.5 million, most of which accrued to foreigners.

An historical overview of the development of copyright legislation in Jamaica is presented in [Daley, 2000]. She shows how the current legislation, the Copyright Act of 1993, evolved from the original legislation of 1913 (based on the UK law of 1911). There had been a prior attempt in 1977, but the draft Copyright Act was deemed to be unsatisfactory, because it "was silent on the rights of performers and the issue of moral right was never brought into force" [Daley, 2000, Footnote 2, P.2]. Voices from the music industry were in the forefront of the lobby for both the 1977 draft and the 1993 Copyright Act.

[38] A royalty is paid to the Government of Jamaica by the Bauxite companies for ore that is mined.

In Daley's judgment, "Jamaica has the basic legislative framework, which is required to support a national copyright system[39]. Experience with the implementation of the Copyright Law so far has shown that there are a number of aspects of this framework, which needs to be strengthened to facilitate the operations and growth of copyright-related industries.

Copyright management and administration, in respect of which Jamaica has a fledgling infrastructure, is an essential part of this framework. The existing Jamaican collecting societies cover only certain types of rights. There are other rights for which no collective mechanism exists, which require a collective management structure such as the rights of performers."[40]

The **Jamaica Intellectual Property Office (JIPO)** succeeded the Copyright Unit in January 2000 and was established as a department within the Ministry of Industry, Commerce and Technology as the central Government administrator of the intellectual property laws. Its mandate includes the modernization of legislation covering all areas of intellectual property. Hitherto Prior to JIPO's establishment, various Government agencies and Ministries had responsibilities for different aspects of the administration of intellectual property. All of these functions have been centralized in JIPO.

[39] In a comment on a draft of this study, Mrs. Carol Simpson-Robinson, senior Programme Officer of the of the Jamaica Intellectual Property Office pointed out that, "Jamaica became a signatory to three prominent Copyright Treaties, administered by the World Intellectual Property Organization, WIPO, which affords Jamaican creators and rights holders an international level for production and offers reciprocal treatment to foreign rights holders as well."

[40] See Daley, 2000, P.4

In April 2000, the **Intellectual Property Service Centre (IPC)** was established by private initiative, and the blessings of the government, to register copyrights. This is an important function since a record of rights is often necessary to resolve disputes.

'The existing Jamaican collecting societies" to which Daley referred in the quote above were, the **Jamaica Musical Rights Administration Society (JAMRAS),** the **Jamaica Copyright Licensing Agency (JAMCOPY),** and the **Jamaica Association of Composers, Authors and Publishers (JACAP).** Since Daley's paper was published, the **Jamaica Performers Administration Society (JPAS)** was formed in 2000 to collect royalties on behalf of performers.

Established in 1989, **JAMRAS** represents the interests of record producers and companies. The sale of recorded music or its use for public commercial purposes entitles the owner of the label under which the musical work is sold, to a royalty. In the case of Jamaica, most of the sales and most of the airplay are accounted for by foreign music, and hence most of the royalties collected by JAMRAS accrue to owners of foreign labels, mainly the major international record companies. As the representative of IFPRI, JAMRAS collected a small amount of royalties from radio stations until 1999 when the lead radio station ceased paying over royalties to JAMRAS. JAMRAS is currently challenging this radio station in court with a view to applying a favourable ruling by the court to the other radio stations.

JACAP was established in 1998 to manage the performing and mechanical rights of its members and to collect royalties for them. It is the successor organization to the Performing Rights Society (PRS) of the UK, which had carried out this function for the previous 64 years. A well-known Director of JACAP, Tony Laing, believes that

that “There are hundreds of millions of dollars out there to be collected.” [**Gleaner, 25.1.1999**].

JACAP will inherit some of the challenges that daunted PRS’ collection efforts. First, there is still insufficient understanding even among creators – composers and publishers – of their rights and the management of those rights. Second, and complementary to this, is the persistence of disrespect for protected works as evidenced by the extent of piracy, and the difficulties in negotiating licensing agreements with organizations that use music. An important implication of these two challenges for the collecting societies is lack of access to sufficient resources to carry out their mandates. Third, some of the more important producers have preferred to register their works with collecting societies abroad, such as PRS (UK), ASCAP and BMI[41].

JAMCOPY was established in 1998 as “a collecting agency in the area of reprographic rights”[42], the first in the Anglo-Caribbean.

JPAS was formed to collect royalties due to Jamaicans for their performing rights. According to Tony Laing, one of the driving forces behind the establishment of JPAS, “The amount of money owing to Jamaican performers is at least US$ 60 million”. [**Gleaner, March 25, 2001**]. This estimate is based on research done on the logs of French radio stations and the records of the collecting societies by a French lawyer hired by JPAS to fight a legal battle with the French Ministry of Culture for JPAS to have a branch in France. Such a branch would allow for the direct collection of royalties for performing rights (rights of performers), rather than the indirect

[41] I am indebted to Mrs. Carol Simpson-Robinson for pointing out this to me in her comments on a draft of this paper.

collection through a French collecting society, like ADAMI, which retains some of the money collected for its administrative and other expenses.

JPAS has declared its intention to work with national collecting agencies in the countries that are major markets for Jamaican music to estimate the number of hours of airplay of Jamaican music to determine payments by those collecting societies to JPAS on behalf of Jamaican performers. In addition, JPAS reports that it has made significant progress in negotiating payments from radio and TV stations for performing rights, and in forging relations with PASA of France and of the USA

It should be noted here that JPAS, like other collecting societies, has to pay foreign rights holders out of its collections from local institutions, such as radio and TV stations that use the musical works of these artistes in public. Because of the dominance of non-Jamaican music on Jamaican radios, the bulk of royalties paid over to the collecting societies will go abroad. This makes it all the more important for Jamaican rights holders to get the payments due to them from foreign radio, television, film and other entertainment media for the use of their work in these foreign markets.

The activities of the collecting societies, and one in particular, has led to increasing collections over the past three (3) years [see **Table VI.1]**

Table VI.1: Royalties Paid to Collecting Societies

US$	**1999**	**2000**	**2001** (projected on the basis of collections from January to June)
Total Collections - Music	200,000	300,000	360,000
Total Collections – all Intellectual Property	200,000	300,000	550,000

[42] ibid, P.7

Source: JACAP, JAMRAS, JAMCOPY

These are marginal amounts, but it must be borne in mind that the collecting societies are new, still quite weak, and their collection efforts are resisted by the powerful institutions that use music for commercial purposes. Further, the level of general understanding of and respect for copyright is still low both in the music industry and in the wider society. Nevertheless, the potential for far greater collections of royalties drives the collecting societies to improve their effectiveness.

Section VII: Institutional structure and linkages

Organizations in the sector

Many organizations in the music industry, perhaps the majority, are informally constituted. Some typical examples are:

- one person carrying out a single activity, say a musician
- one person carrying out multiple activities, say a musician-producer-promoter
- loose affiliations of persons, say “crews” of DJ’s
- sound systems, bands or musical groups not registered as legal entities

However, the industry is dominated by formal organizations, such as limited liability companies.[43]

The music industry as a whole has historically resisted organization. One of the more enduring and successful institutions is the more than 40-year-old **Jamaica Federation of Musicians (JFM)** with a membership of over 2000. This is a trade union that concerns itself with the working conditions, fees and general welfare of its members. Its effectiveness has varied over the years with the quality of leadership. Its monopoly power in the market for musician services will probably decline with the liberalization of trade in services, the loss of prestige of unions in general, and the substitution for machine/computer-played music for the services of musicians.

The **Sound System Association of Jamaica**, with over 150 members, represents operators of sound systems and discos as a lobby group (e.g., public policy on night noises) and monitors the performance standards of its members.

[43] These organizations are themselves capable of informal economic activities.

Public sector institutions

The **Jamaica Cultural Development Commission** (**JCDC**) is a government organization charged with the responsibility of promoting the creative talents and cultural expressions of Jamaica with a view to sustaining Jamaica's cultural heritage. It organizes a National Popular Song Competition and a National Gospel Song Competition as features in the annual Independence celebrations.

JAMPRO is the investment promotion arm of the government. One of its mandates is to develop the film and music industries as areas of investment, particularly foreign investment, as a central element of the government's strategy for economic growth. Toward this end, it has commissioned several studies of the industry, organized promotional activities, such as participation in Midem, developed a national marketing strategy, as well as several initiatives to promote investment in the music industry.

Section VIII: Music in the Jamaican economy

A Preliminary Assessment

The music industry provides employment and income for 6,000 – 12,000 people, the equivalent of about 1% of the employed labour force, many of them with little or no formal education. As such, it has served as an avenue out of poverty for the successful few, and offers hope to many others. Because so many of the people in the industry are from poor communities, the impact of their economic gains is often directly felt at the community level by way of consumption spending on large families and retinues and investment spending on housing and vehicles.

While it depends on imported inputs - even electricity generated locally is essentially imported petroleum - its principal input is the creative power of the Jamaican artiste and musician. Its forward linkages are to tourism, to advertising, and to the film industry. Income generated in the industry finds its way into the real estate and housing markets, into distribution of food and other consumption goods, into air and ground transport, and back into the industry itself [**see Figure 2, end**]. The bulk of this income is generated overseas, and the challenge is to collect the vast sums that have already accrued, to halt the decline of Jamaica's share of the international market for music, and to carve out new niches in the market.

Conclusion

Future earning power will depend not only on collections from already published work, but from developing new forms of music to command a share of the constantly changing market for popular music. This is essentially a business challenge: to offer the market what it wants.

The major resource requirements are creative talent, finance, and innovative production of musical works. Talent is abundant. Finance is scarce, but high quality products will attract funding from the international record companies. Further, with a higher rate of reinvestment of the industry's earnings in strategic initiatives, innovative producers attuned to the changing market preferences could develop the high quality products.

The industry has developed without the assistance of the government, and arguably, in spite of government policy. In 1996, the National Industrial Policy officially recognized music and entertainment as two foci of the government's development strategy. That is, for the first time, music was identified in official policy as one of the engines of growth.

There is a role for enlightened government policy and supportive programmes in a strategic plan for the industry's future development. Already, there are clear moves in this direction by the government, most notably the waving of duties on musicians "tools of trade" and the commitment to taxing Jamaica CDs manufactured abroad only on the portion of value assed abroad.

Such a plan must be informed by the industry's vision of its own future, and its commitment of resources to realizing that vision. The industry vision in turn will probably derive from the vision of a few forward-looking investors, similar to the dynamic, even catalytic, role that Chris Blackwell's investments played in the emergence of reggae as an international commodity in the 1970s.

Directions for Future Research

Like others before it, this study has had to rely on weak data. The participants in the industry admit to the almost endemic secrecy about their operations that in turn condition the quality of estimates of indicators of industry activities. It is difficult to imagine the industry developing without a better understanding of the structure of its costs, the potential markets that it can tap, and the flows of incomes accruing to the various participants in the industry. Without music entrepreneurs recognizing that more information is in their business interests, it is difficult to see how the quality of data available for analysis will improve.

Household surveys and focus group studies of musicians and other industry groups who are willing to cooperate with the study could give better estimates of the employment and incomes earned in the industry. Studies of tax returns of the principal Jamaican companies will help to identify production levels and costs in Jamaica, but given the practice of under-reporting, this data is probably best interpreted with the assistance of experienced industry persons with access to information. To get a more accurate picture of the international market, it is imperative that researchers gain the confidence and support of the major companies in the USA and the UK at the very least, which supply Jamaican music.

There is a familiar cycle of rise to stardom and decline, sometimes rapidly into obscurity, and other times into the status of "veteran" performing "old hits". Case studies of the careers of artistes, producers and promoters would also enhance understanding of the dynamics of the industry.

These are the directions for future research in order to create a firmer information and database for assessing the contribution of music to the Jamaican economy.

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Figure 1:Circular Flow of Income in the Jamaican Music Industry

(Black arrow = flow of goods (e.g., tape) and services, Red arrow = flow of income)

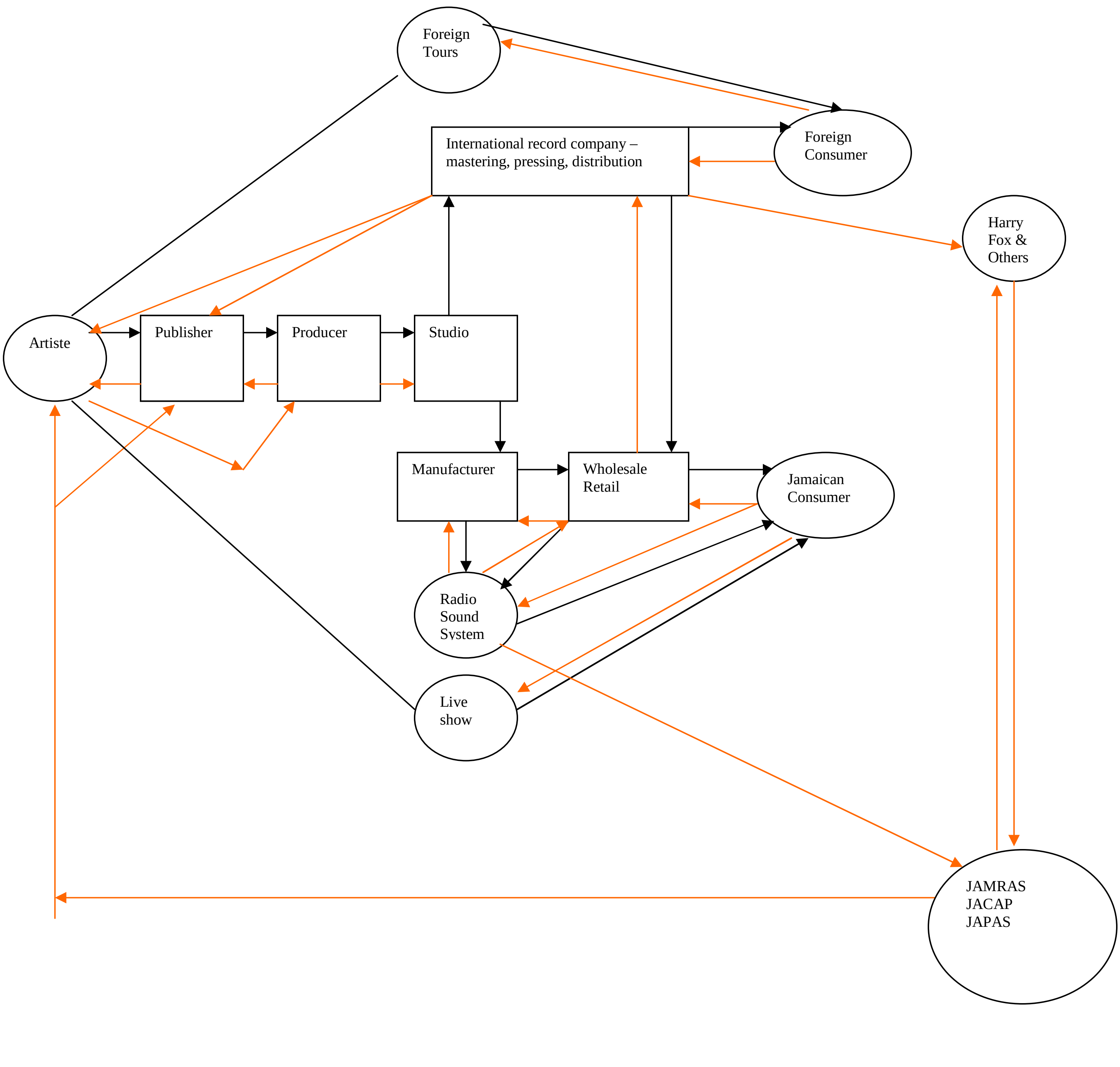

Figure 2: Music Industry Linkages with other industries