



SOUND
DIPLOMACY

PUERTO RICO

MUSIC, ENTERTAINMENT
AND CULTURAL
INDUSTRIES STRATEGY

FOREWORD

INVEST PUERTO RICO

Invest Puerto Rico (InvestPR) is a pivotal entity in the economic landscape of Puerto Rico. Established as a not-for-profit organization under Act 13-2017, InvestPR operates as the official business attraction organization for the island. Leveraging the collective expertise of both the private and public sectors, our mission is clear: to promote Puerto Rico as a competitive investment jurisdiction and to attract new business and capital investment to our shores.

Our vision is ambitious yet attainable – we aim to serve as a transformational and results-oriented accelerator of economic development in Puerto Rico. InvestPR’s promotion strategy aims to elevate Puerto Rico’s profile as an investment hub. As such, it seeks to further understand the assets of the creative economy within the Island to be able to elevate and better position the value proposition Puerto Rico offers regarding these industries.

Why does Invest Puerto Rico need a study like this one? The answer lies in recognizing the tremendous potential of Music and the Creative Industries to drive economic growth, increase tax revenue, attract top talent, and enhance the overall well-being of the Island. Puerto Rico stands as a beacon in this regard, boasting a rich cultural heritage and serving as a global hub for innovation. Yet, amidst this abundance of creativity and entrepreneurial spirit, there is a shared conviction that the Creative Industries can thrive even further with greater collaboration

and support from both the public and private sectors. Our study seeks to address this need by exploring avenues for enhanced engagement and strategic alignment within the Creative Industries sector.

Our objectives are multifaceted and ambitious, reflecting our commitment to comprehensive analysis and actionable recommendations. We aim to:

- Outline & study how local government entities currently engage with music & culture and create a unified public policy vision to inform the rest of the study.
- Map the complete value chain of Puerto Rico’s music & related culture assets (venues, studios, rehearsal spaces, production spaces, schools, museums etc.) and assess the Island’s existing creative industry policies, plus a comparative analysis with 4-5 other similar/like-minded jurisdictions.
- Deliver a thorough economic impact assessment of Puerto Rico’s music & related cultural industry and ecosystem value chain.

- Produce a strategy and implementation plan on how InvestPR, working with other local stakeholders, can best market and foment music & related creative industries going forward to support sustainable economic development on the Island.
- Provide recommendations on how local government policies and programs can better support and develop the entire ecosystem that includes music & related creative industries in Puerto Rico.

By undertaking this study, InvestPR seeks to lay the foundation for a more vibrant, resilient, and prosperous creative ecosystem in Puerto Rico. We believe that by harnessing the power of music and the Creative Industries, we can unlock new opportunities for growth, innovation, and cultural expression. Together, let us embark on this journey toward a brighter future for Puerto Rico’s creative community.

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1. ABOUT THE PROJECT

PROJECT DESCRIPTION

Music and the Creative Industries have the potential to offer economic growth, increase tax revenue, attract the brightest talent, and contribute to social and cultural inclusion in Puerto Rico.

This is no more evident than in Puerto Rico, one of the music tourism capitals of the world and a place that punches well above its weight in terms of global talent development. The island is overflowing with top-of-the-line displays of creativity, arts and culture and, especially through music and live performances, has become a landmark for countries all across Latin America and the Caribbean.

However, and even though creativity and entrepreneurship are ever present in the Puertorrican context, there is a widespread belief that the Creative Industries could develop even further with more collaboration and support from both the public and the private sectors, and with a much more intentional connection between the local arts and big players not just in the U.S. but also across the Latin American region.

In this context, InvestPR, Sound Diplomacy, Inversión Cultural and 71 Associates have created a one-of-a-kind partnership that seeks to understand how the existing

Creative Industries are operating, what are the local institutions doing to support them, the needs that these industries face, and what the future can look like through focused strategic planning. This report not only aims at providing a glance at the current context of the Creative Industries in Puerto Rico, but most importantly, it aims at putting forward a series of actionable recommendations that can inform decision making, and help bring the Puertorrican Creative Industries forward.



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METHODOLOGY

The following processes informed the development of the Puerto Rico Music, Entertainment and Cultural Industries Strategy:

IDEATION

A vision meeting with InvestPR and other relevant stakeholders to discuss the state of the Creative Industries in Puerto Rico and project objectives, with the goal of developing a unified set of strategic aims for the project.

LITERATURE REVIEW AND REGULATORY ASSESSMENT

This consisted of a review of local and regional reports, plans, policies, and regulations relevant to Puerto Rico's Creative Industries. The analysis included a regulatory assessment of current country-wide regulations impacting the Creative Industries' ecosystem, as well as providing each with a relevant best practice case study to guide how existing regulations can be made more accommodating to the sector.

ASSET MAPPING

Using its own web scraping and mapping tools, Sound Diplomacy mapped the assets from the creative industries in Puerto Rico to create an interactive map tool that offers a glimpse on the geographical distribution of the assets and the potential gaps or networks created by said distribution. This exercise also informs the project's Economic Impact Assessment.

ECONOMIC IMPACT ASSESSMENT

The economic impact analysis was based on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the Creative Industries in Puerto Rico on two different scales: direct and indirect impact.

STAKEHOLDER ENGAGEMENT¹

Sound Diplomacy conducted a total of 12 stakeholder engagement sessions with over 60 stakeholders engaged through roundtables and one-on-one interviews, where they were asked to provide their opinions and perspectives on the state of the Creative Industries in the island.

SWOT ANALYSIS

All findings from the literature review and regulatory assessment, economic impact analysis, and stakeholder engagement were collated to provide insight into the strengths, weaknesses, opportunities and threats of Puerto Rico's Creative Industries.



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STRATEGIC PLAN

Informed by the above research and analysis, a set of 26 actionable recommendations that serve as a blueprint for developing and maintaining thriving Creative Industries in Puerto Rico were proposed.



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2. PUERTO RICO AT A GLANCE

CROSS-SECTOR REGULATIONS

CROSS-SECTOR POLICIES AND REGULATIONS ANALYSIS

TOPIC	ANALYSIS	COMMENT	BEST CASE
PRIMARY EDUCATION	Room for growth	Puerto Rico benefits from specialized arts and cultural schools. However, the Education Reform Act ² could benefit from incorporating arts and culture within primary education curricula. Furthermore, there is a disconnect between the educational system and the robust network of art schools.	New Victory Education, New York City, US ³
HIGHER EDUCATION	Room for growth	Conservatories and universities have cultural programs in place. However, more integration is needed between arts, business and technology programs. Only a few universities, such as Puerto Rico University, Universidad del Sagrado Corazón, Atlantic University, offer a full program in Cultural and Creative Industries that also includes tourism and entertainment.	Louisiana's Entertainment Development Fund, US ⁴
PROFESSIONAL & EXTRACURRICULAR TRAINING	Underdeveloped	There is a limited offer of professional and extracurricular programs.	First Music Contact, Ireland ⁵
ECONOMIC DEVELOPMENT INCENTIVES AND SUPPORT FOR THE ARTS AND CREATIVE INDUSTRIES	Room for growth	The allocation of funds to the cultural sector constitutes approximately 0.25% of the total government budget. ⁶ The Law to Promote Creative Industries ⁷ is not enforced despite the existence of comprehensive measures and incentives.	National Incentive Program for the Arts, Colombia ⁸
CULTURAL SECTOR HUB/ INCUBATOR	Room for growth	Since 1988, multiple initiatives have been developed to strengthen Santurce as a Cultural District. ⁹ This neighborhood hosts the main cultural infrastructure of the country. Nevertheless, past governmental initiatives aimed at backing this district have become obsolete.	Louisiana's Cultural District Program, US ¹⁰
ENVIRONMENTAL SUSTAINABILITY	Underdeveloped	Sound Diplomacy could not find any significant plans for environmental sustainability in the CCI.	Eco-conditionality of Financial Support, Maison de la Musique Contemporaine, France ¹¹
INTERNATIONALIZATION, EXPORT, DIPLOMACY	Underdeveloped	Sound Diplomacy could not find any significant plans for the internationalization and external growth of the cultural sector.	Catalan Arts Internationalization Program, Spain ¹²
TOURISM	Room for growth	The Puerto Rico Tourism Company and Discover Puerto Rico are responsible for marketing efforts. However, there is insufficient cooperation with the local cultural sector. For instance, the hotel room tax ¹³ is currently not used for cultural promotion at any level, which means there is a lack of connection between the CCI and the tourism economy in Puerto Rico.	CREATURES Promoting Creative Tourism through new Experiential and Sustainable Routes, Italia ¹⁴

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TOPIC	ANALYSIS	COMMENT	BEST CASE
DIVERSITY, ACCESS, EQUITY, INCLUSION	Underdeveloped	Sound Diplomacy could not find any plan to raise awareness about the importance of Diversity, Access, Equality and Inclusion.	Feminine Quota Law to Balance the Participation of Women and Men in Festivals, Argentina ¹⁵
KNOWLEDGE, TRANSPARENCY	Room for growth	Centro de Economía Creativa's LabCultural provides insight into the Creative Industries. ¹⁶ However, it is an independent initiative without government support.	Culture and Communication Observatory in Québec, Canada ¹⁷
COPYRIGHT AND IP	Mature	Puerto Rico's creatives rely on federal copyright law. The U.S. copyright system provides substantial protections. There is also a national system of copyright registry.	Artists' Rights Society Guidance on Copyright in Music Education, UK ¹⁸
TECHNOLOGY AND INNOVATION	Room for growth	While the Puerto Rico Science, Technology and Research Trust acknowledges cultural matters, ¹⁹ the island lacks a holistic program that effectively supports innovation within the cultural industries.	UK Research and Innovation Program ²⁰
HEALTH AND SAFETY	Underdeveloped	Sound Diplomacy could not find any significant plans for health and safety related to the CCI.	The Loop, UK ²¹
PUBLIC TRANSPORTATION AND TRANSIT	Underdeveloped	Sound Diplomacy could not find any significant plans related to this topic.	Sydney's Late Night Transport Working Group, Australia ²²
CCI GOVERNANCE	Room for growth	The ICP is in charge of the cultural policy but does not cover all CCI sectors, especially the audiovisual and the design sectors. The ICP focuses on individual artists and nonprofit companies, and does not cover the other elements of the CCI value chain. It has a work team specialized in the Creative Industries, however its actions in this field remain limited. In terms of operation, it lacks funding and continuity in cultural policies. Generally, the CCI lack representative bodies to partner with the ICP.	Louisiana Entertainment, US ²³

CROSS-SECTOR URBAN PLANNING AND ORDINANCES

PERMITS	Room for growth	Up to this point, the Permit Management Office (OGP) has effectively expedited its processes. ²⁴ However, there is confusion between the national and the city level in issuing permits. There is also a lack of clarity regarding the possibility of organizing events in bars and cafés. Finally, there is no specific process for cultural activities.	Austin, TX Event Permits, US ²⁵
SOUND ORDINANCES	Underdeveloped	Sound Diplomacy found no noise or sound ordinance that specified exemptions or clarifications for cultural activities.	Austin, TX Noise Ordinances, US ²⁶
LIQUOR LICENSING	Room for growth	Many businesses choose not to apply for an alcoholic beverage sales license because the process is complicated, expensive, and cumbersome. There are no specific licensing options for cultural activities or institutions.	New Orleans' One Stop Shop, US ²⁷
STREET ART AND PERFORMANCE	Room for growth	Accredited artists and artisans need sitting permits for their mobile extensions. ²⁸ Noise levels must be kept low, and mobile businesses are prohibited in certain areas. ²⁹	Louisiana's Percent for Art Program, US and Iztapalapa Mural, Mexico ³⁰
OPENING HOURS	Underdeveloped	Sound Diplomacy could not find any specific regulations for cultural spaces.	Amsterdam's Opening Hours Measures, The Netherlands ³¹

INDUSTRY-SPECIFIC REGULATIONS³²

VISUAL ARTS AND CRAFTS POLICIES AND REGULATIONS ANALYSIS

TOPIC	ANALYSIS	COMMENT	BEST CASE
FINANCIAL SUPPORT & INCENTIVES	Room for growth	There are various initiatives, both governmental and non-governmental, that support craft and artisanal activities. However, there is a lack of support for new creators and innovative projects.	Studio Installation and Material Purchase Allowance, France and Florida's Art in State Buildings, US ³³
LICENSING & REGULATIONS	Room for growth	Puerto Rico supports and registers artists through different programs. However, the results and impacts of these initiatives are not easy to access and clear.	Art Basel Art Market Principles and Best Practices ³⁴
NETWORKS AND PROFESSIONAL ASSOCIATIONS	Room for growth	While artisans have their own federation, there is a noticeable absence of a network that effectively represents and supports new creators and galleries.	Association des Galeries d'Art Contemporain (AGAC), Canada ³⁵
EVENTS (CONFERENCES, FAIRS, FESTIVALS)	Room for growth	While artisans have a significant number of craft markets, there is a notable absence of art festivals.	Art Basel Miami, US ³⁶
MAP OF RESOURCES	Room for growth	The ICP developed a digital application dedicated to crafts work in Puerto Rico. ³⁷ However, the information is unavailable on other platforms and does not include contemporary creators.	Art Monthly App, UK ³⁸



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MUSIC RECORDING AND PUBLISHING POLICIES AND REGULATIONS ANALYSIS

TOPIC	ANALYSIS	COMMENT	BEST CASE
FINANCIAL SUPPORT & INCENTIVES	Underdeveloped	Sound Diplomacy could not find any policy or program in place to support this sector.	Louisiana Music Job Creation Program, US ³⁹
LICENSING & REGULATIONS	Mature	Puerto Rico is covered by major performing rights organizations (PROs) such as ASCAP and BMI. ACEMLA is the local PRO.	TheMusicLicence, UK ⁴⁰
NETWORKS AND PROFESSIONAL ASSOCIATIONS	Underdeveloped	Sound Diplomacy could not find a unified strategy or overarching coordination between actors in this sector.	The Music Producers Guild, UK ⁴¹
EVENTS (CONFERENCES, FAIRS, FESTIVALS)	Room for growth	Existing public initiatives such as Composer's Month lack relevance. Private initiatives are scarce, and lack a cohesive and coordinated approach to represent the sector beyond urban music.	The Musical Family Tree by South by Southwest (SXSW), US ⁴²
MAP OF RESOURCES	Underdeveloped	There is currently no map of resources available for this sector.	London Music Office website of resources, Canada ⁴³

CULTURAL AND NATURAL HERITAGE POLICIES AND REGULATIONS ANALYSIS

FINANCIAL SUPPORT & INCENTIVES	Room for growth	The sector suffers from limited funding and lacks an updated plan to drive innovation and develop new audiences.	Support for Investments in Historical Monuments Owned by Local Authorities and Private Owners, France ⁴⁴
LICENSING & REGULATIONS	Room for growth	Various organizations and government entities work on heritage preservation and conservation efforts, aiming to protect historical sites and cultural practices. However, there is a lack of integration of tourism and cultural institutions within the heritage framework. The sector also lacks a comprehensive program that effectively registers and promotes the cultural production of Puerto Rico as a national heritage.	Historic England, UK ⁴⁵
NETWORKS AND PROFESSIONAL ASSOCIATIONS	Room for growth	There is a mix of public and private heritage networks, however, the relevance of their activity is not always clear. ICP is well integrated into the US National Assembly of State Arts Agencies.	Communitism Athens, Greece ⁴⁶
EVENTS (CONFERENCES, FAIRS, FESTIVALS)	Underdeveloped	There is a lack of innovative and engaging events dedicated to heritage professionals and audiences.	Open House Festival, UK ⁴⁷
MAP OF RESOURCES	Room for growth	The Museums and Parks network, managed by the Institute of Puerto Rican Culture, represents a wide range of cultural and historical elements vital to the Puerto Rican identity. The Museums and Parks program directs and coordinates the operation of the buildings included in the network. Although the ICP maps its own network of museums, it lacks a more reflexive census of heritage facilities and programs.	Louisiana's Folklife Program, US ⁴⁸



PERFORMANCE AND CELEBRATION POLICIES AND REGULATIONS ANALYSIS

TOPIC	ANALYSIS	COMMENT	BEST CASE
FINANCIAL SUPPORT & INCENTIVES	Room for growth	Most financial support is dedicated to a few organizations, such as the Corporación de Artes Musicales, which focuses on art and folkloric music. There is no support program for event production and popular music.	Support for the Creation, Production and Diffusion of Spectacles, France ⁴⁹ GIP ⁵⁰ & GUSO ⁵¹ , France
LICENSING & REGULATIONS	Room for growth	The Colegio de Productores de Espectáculos Públicos is the main body that regulates live entertainment in Puerto Rico. ⁵² However, it lacks transparency. The sector also suffers from a lack of equity in the ticket sale business. Finally, regulations to support local artists still need to be implemented.	Ley de Espectáculos Público, Colombia ⁵³
NETWORKS AND PROFESSIONAL ASSOCIATIONS	Room for growth	Except for the The Colegio de Productores de Espectáculos Públicos, there is a significant lack of professional organizations representing the sector.	MTL 24/24, Canada ⁵⁴
EVENTS (CONFERENCES, FAIRS, FESTIVALS)	Underdeveloped	Sound Diplomacy could not find any industry event dedicated to live entertainment. Municipal festivals and fiestas patronales play an important role in promoting and showcasing local talent through public events.	Montreal Night Summit, Canada ⁵⁵
MAP OF RESOURCES	Room for growth	CulturalPR and Voyturisteando have made commendable efforts in their respective endeavors. However, despite their contributions, there still needs to be a comprehensive and centralized platform to connect cultural and tourism activities.	London Cultural Infrastructure Map, UK ⁵⁶

AUDIOVISUAL AND INTERACTIVE MEDIA POLICIES AND REGULATIONS ANALYSIS

TOPIC	ANALYSIS	COMMENT	BEST CASE
FINANCIAL SUPPORT & INCENTIVES	Room for growth	Puerto Rico has a robust film industry development program that relies on tax incentives. ⁵⁷ However this program is financially limited and does assist local productions. Furthermore, there is a lack of support for documentaries and new media projects.	British Film Institute (BFI), UK ⁵⁸ & COCO-I ⁵⁹ , Assistance with co-writing international co-productions, France
LICENSING & REGULATIONS	Underdeveloped	Sound Diplomacy could not find any specific agency that comprehensively regulates the industry's activities.	The Audiovisual Media Services Directive (AVMS Directive), European Union ⁶⁰
NETWORKS AND PROFESSIONAL ASSOCIATIONS	Room for growth	There is a lack of a consolidated set of professional organizations in the audiovisual sector. However, the Puerto Rico Game Developers Association (PRGDA) has gained relevance over the last few years, partnering with LatAm and U.S. organizations.	The Louisiana Film & Entertainment Association, U.S. & Collectif 50/50, France ⁶¹
EVENTS (CONFERENCES, FAIRS, FESTIVALS)	Room for growth	There is a lack of relevant festivals with an industry-dedicated section.	Ventana Sur, Argentina ⁶²
MAP OF RESOURCES	Room for growth	Discover Puerto Rico provides a list of film locations, inviting tourists to visit them.	New York State Film Offices, US ⁶³



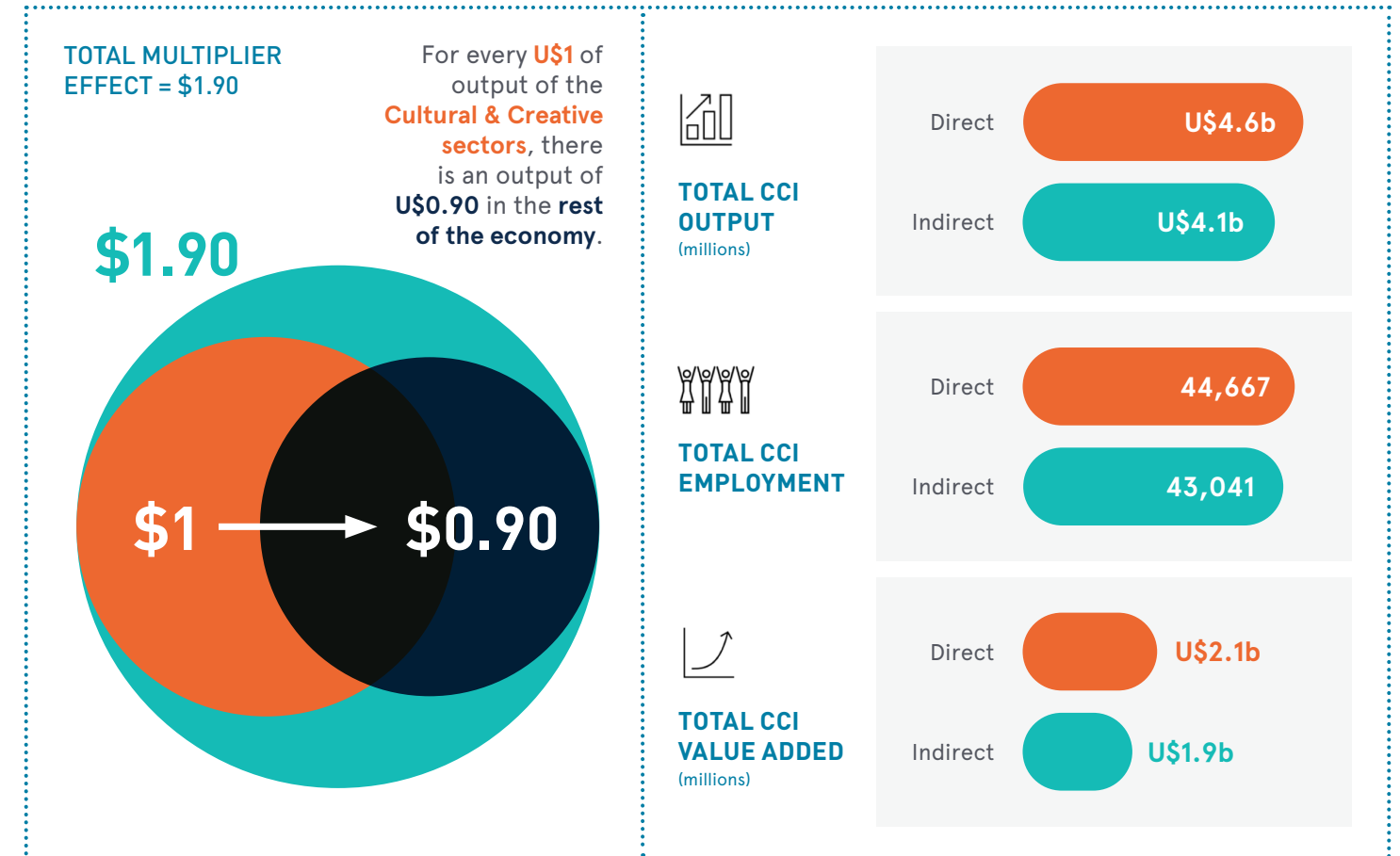
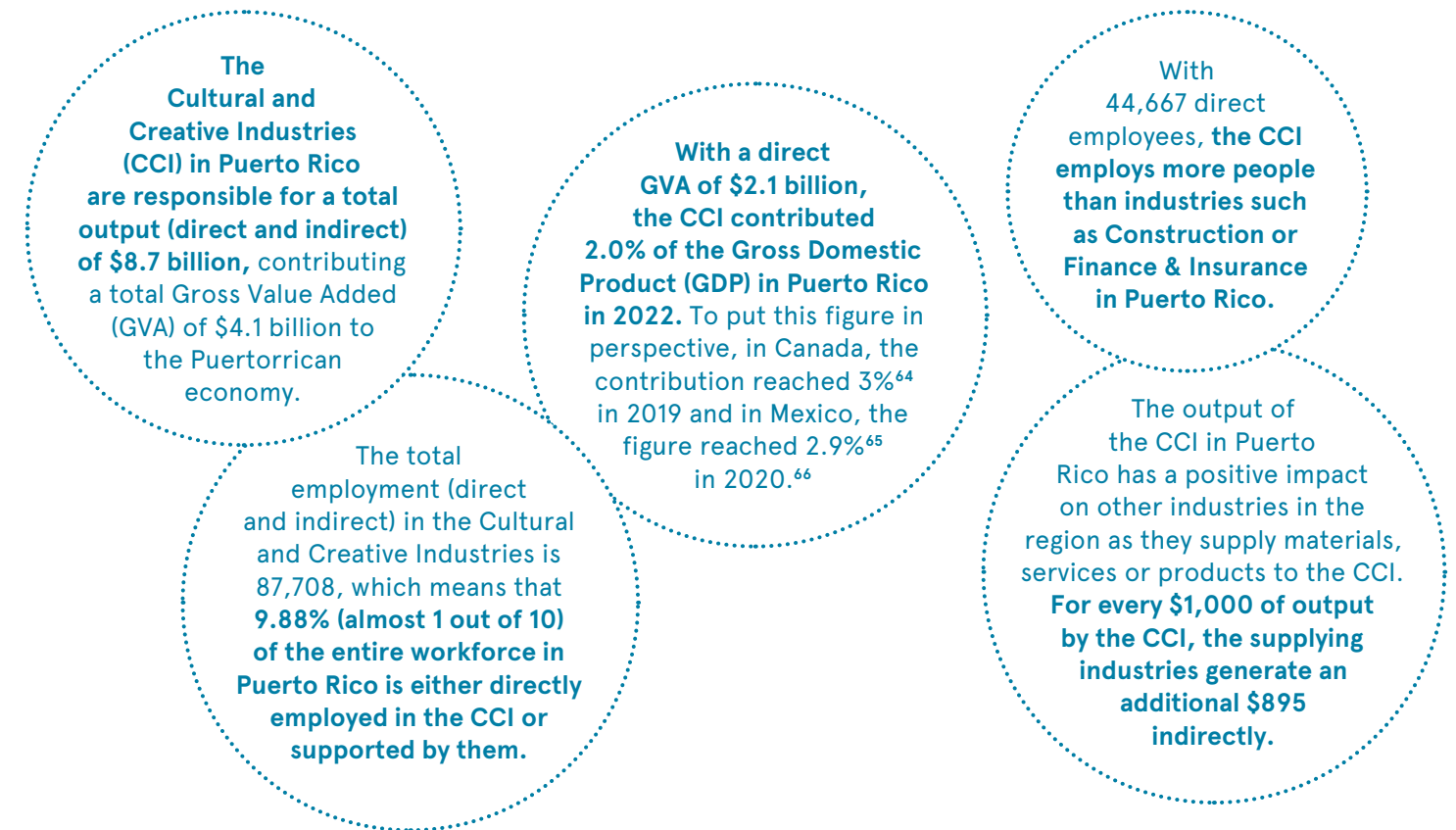
3. ECONOMIC IMPACT AND EMPLOYMENT SUMMARY



CULTURAL AND CREATIVE INDUSTRIES ECONOMIC IMPACT
















OVERVIEW TOTAL ECONOMIC IMPACT OF THE CULTURAL AND CREATIVE INDUSTRIES IN PUERTO RICO

	 TOTAL NUMBER OF ASSETS IN PR	 TOTAL OUTPUT	 TOTAL EMPLOYMENT	 TOTAL VALUE ADDED
 Cultural & Creative Industries (CCI)	4,125	U\$8.7b	87,708	U\$4.1b
 Audiovisual & Interactive Media	627	U\$3.6b	19,089	U\$1.8m
 Design & Creative Services	858	U\$1.5b	10,098	U\$706m
 Books & Press	552	U\$1.2b	12,320	U\$547m
 Cultural Education	390	U\$559m	10,044	U\$302m
 Performing Arts: Live Music, Theatre, etc	275	U\$484m	6,904	U\$185m
 Industry Support - Retail	348	U\$458m	5,584	U\$183m
 Visual Arts & Crafts	410	U\$411m	3,175	U\$162m
 Artistic Creation & Performance	362	U\$249m	17,738	U\$96.6m
 Music Recording & Publishing	216	U\$141m	791	U\$59m
 Cultural & Natural Heritage	70	U\$132m	1,769	U\$55m
 Other Professional & Business Support	17	U\$26m	196	U\$13m

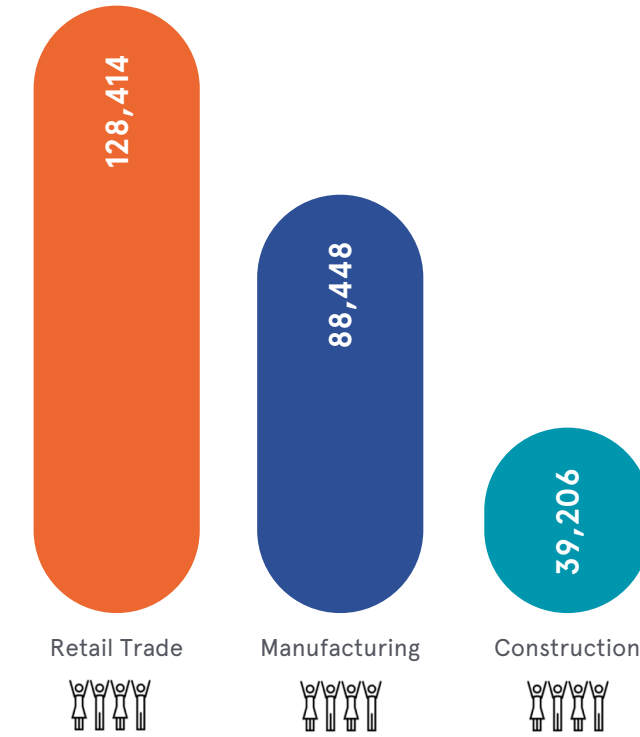


Source: U.S. Bureau of Labor Statistics, U.S. Census Bureau, Junta de Planificación, Sound Diplomacy Research

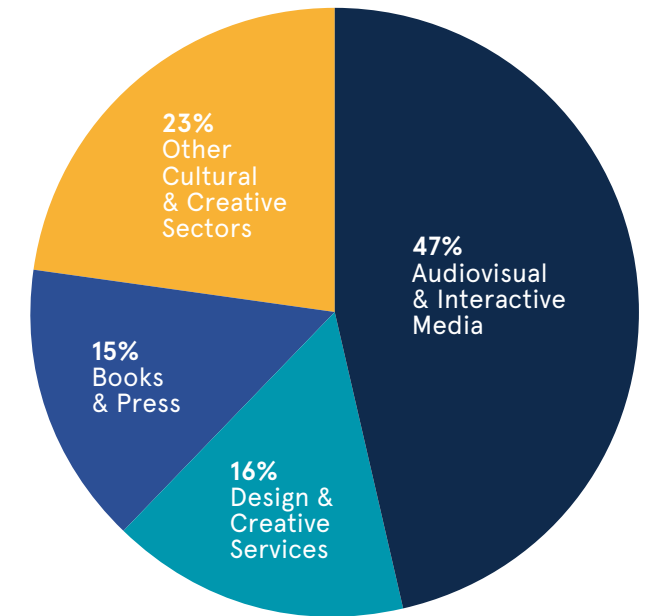
OVERVIEW DIRECT ECONOMIC IMPACT OF THE CULTURAL AND CREATIVE INDUSTRIES IN PUERTO RICO

	 DIRECT ECONOMIC IMPACT ON EMPLOYMENT	 DIRECT ECONOMIC IMPACT ON OUTPUT (\$)	 DIRECT ECONOMIC IMPACT ON VALUE ADDED (\$)
 Overall Cultural & Creative Industries (CCI)	44,667	U\$4.6b	U\$2.1b
 Audiovisual & Interactive Media	8,957	U\$1.9b	U\$1.0b
 Design & Creative Services	6,154	U\$850m	U\$332m
 Books & Press	7,730	U\$631m	U\$319m
 Cultural Education	8,889	U\$344m	U\$159m
 Performing Arts: Live Music, Theatre, etc	2,256	U\$202m	U\$84m
 Industry Support - Retail	1,886	U\$203m	U\$78m
 Visual Arts & Crafts	1,870	U\$190m	U\$79m
 Artistic Creation & Performance	5,217	U\$104m	U\$45m
 Music Recording & Publishing	471	U\$63m	U\$19m
 Cultural & Natural Heritage	1,072	U\$59m	U\$20m
 Other Professional & Business Support	165	U\$15m	U\$5m

SOME SECTORS: REST OF THE ECONOMY



DISTRIBUTION OF THE DIRECT ECONOMIC IMPACT ON VALUE ADDED, PER SECTOR



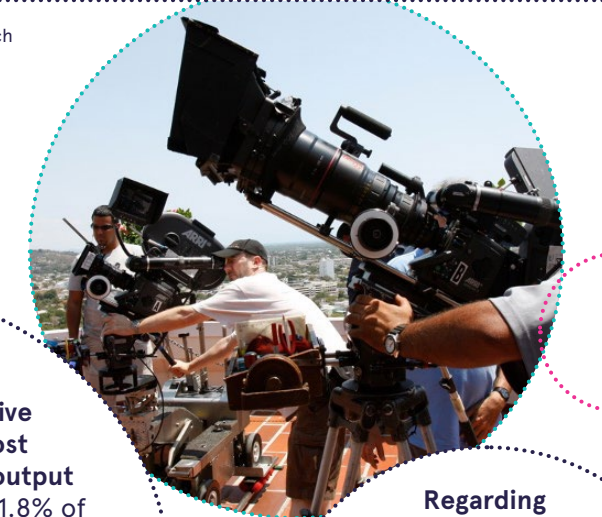
Developed by Sound Diplomacy

Source: U.S. Bureau of Labor Statistics, U.S. Census Bureau, Sound Diplomacy Research

Most direct employment in the CCI in Puerto Rico is located in the Audiovisual & Interactive Media sector with 8,957 employees, closely followed by Cultural Education with 8,889, and Books and Press with 7,730 employees.

In terms of direct output, the Audiovisual and Interactive Media sector has the most significant impact, with an output of \$1.9 billion, constituting 41.8% of the total direct output of the CCI. The next is the Design and Creative Services sector, which creates a direct output of \$850.2 million (18.6%), followed by books and press with \$630.8 million (13.8%). Music Recording & Publishing, Artistic Creation & Performance and Performing Arts combined create a direct output of \$369.2 million (8.1%).

Regarding productivity, highest output per employee is produced in the Audiovisual & Interactive Media industry with \$213,431 per employee, followed by Design and Creative Services with \$138,156 and Music Recording & Publishing with \$133,224.



OUTPUT PER EMPLOYEE IN THE CULTURAL AND CREATIVE INDUSTRIES

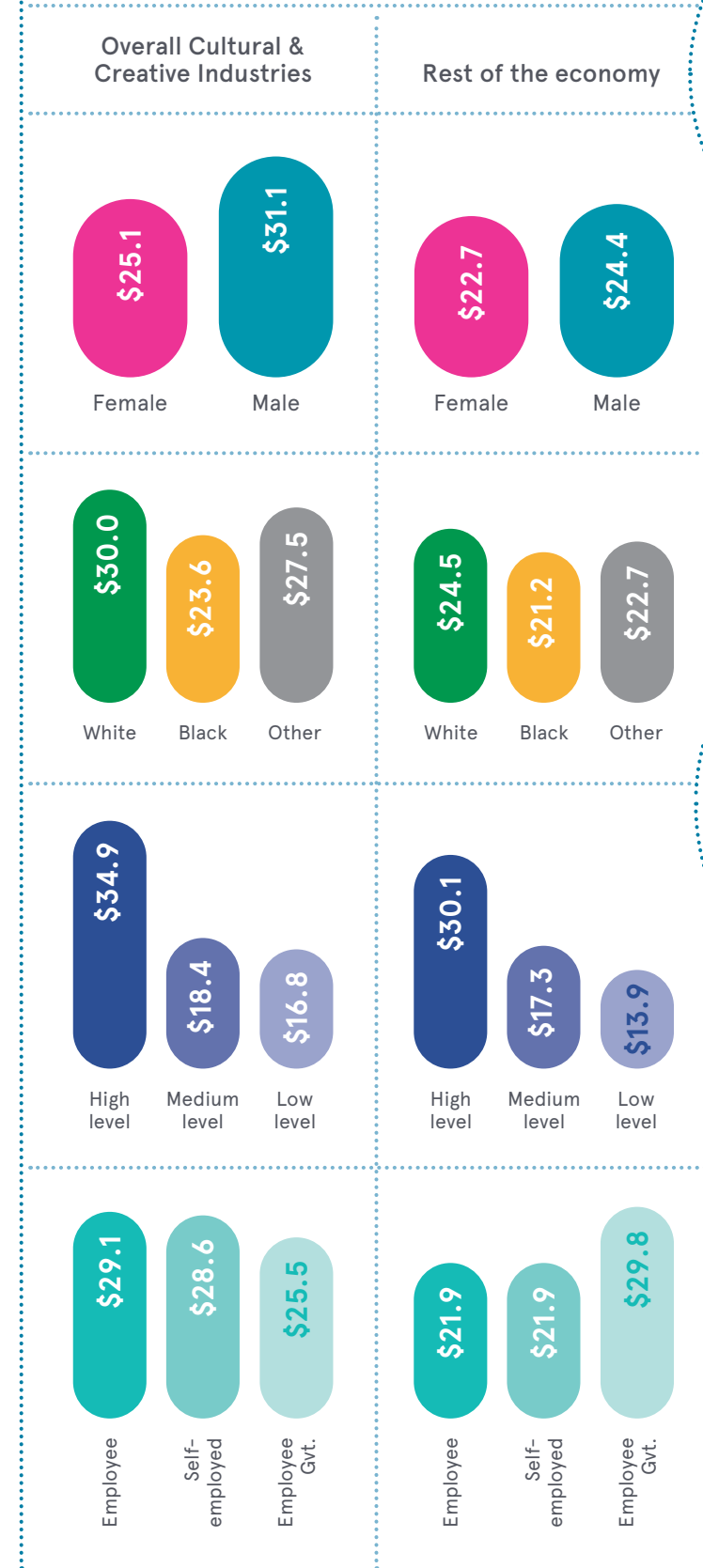
SECTOR	OUTPUT PER EMPLOYEE (IN \$)
Audiovisual & Interactive Media	213,431
Design & Creative Services	138,156
Music Recording & Publishing	133,224
Industry Support – Retail	107,789
Visual Arts & Crafts	101,540
Performing Arts: Live Music, Theatre, etc	89,548
Other Professional & Business Support	89,444
Books & Press	81,604
Cultural & Natural Heritage	54,988
Cultural Education	38,685
Artistic Creation & Performance	20,019

CCI WORKERS' CHARACTERISATION⁶⁷

ANNUAL AVERAGE INCOME, SEGMENTED BY SECTOR AND SOCIOECONOMIC CHARACTERISTICS⁶⁸



Average annual income (thousand US)



Gender pay gap within the CCIs, men earn more than women both in the Cultural and Creative sectors and in the rest of the economy. The gap is higher within the Cultural and Creative sectors (24%) than in the rest of the economy (7%).

Ethnicity pay gap in Puerto Rico, workers that define themselves as white tend to earn more. Among workers in the Cultural and Creative sector, white workers earn on average 27% more than workers that define themselves as black/African American and 9% more than people from other races.

Average annual income for the workforce differs depending on their type of contract. When comparing the Cultural and Creative sector with the rest of the economy, employees and freelancers from the Cultural and Creative sector earn significantly more than their counterparts in the rest of the economy.

Employees from the Cultural and Creative sector earn \$29.1k, 33% more than employees from the rest of the economy (\$21.9k). Similarly, freelancers in the Cultural and Creative sector earn \$28.6k, 30% more than freelancers in the rest of the economy (\$21.9k). The opposite occurs with government employees, where workers in the Cultural and Creative sector earn \$25.5k, 14% less than government employees from the rest of the economy (\$29.8k).

Source: American Community Survey 2016–2020, Sound Diplomacy Research

4. INTERACTIVE MAP

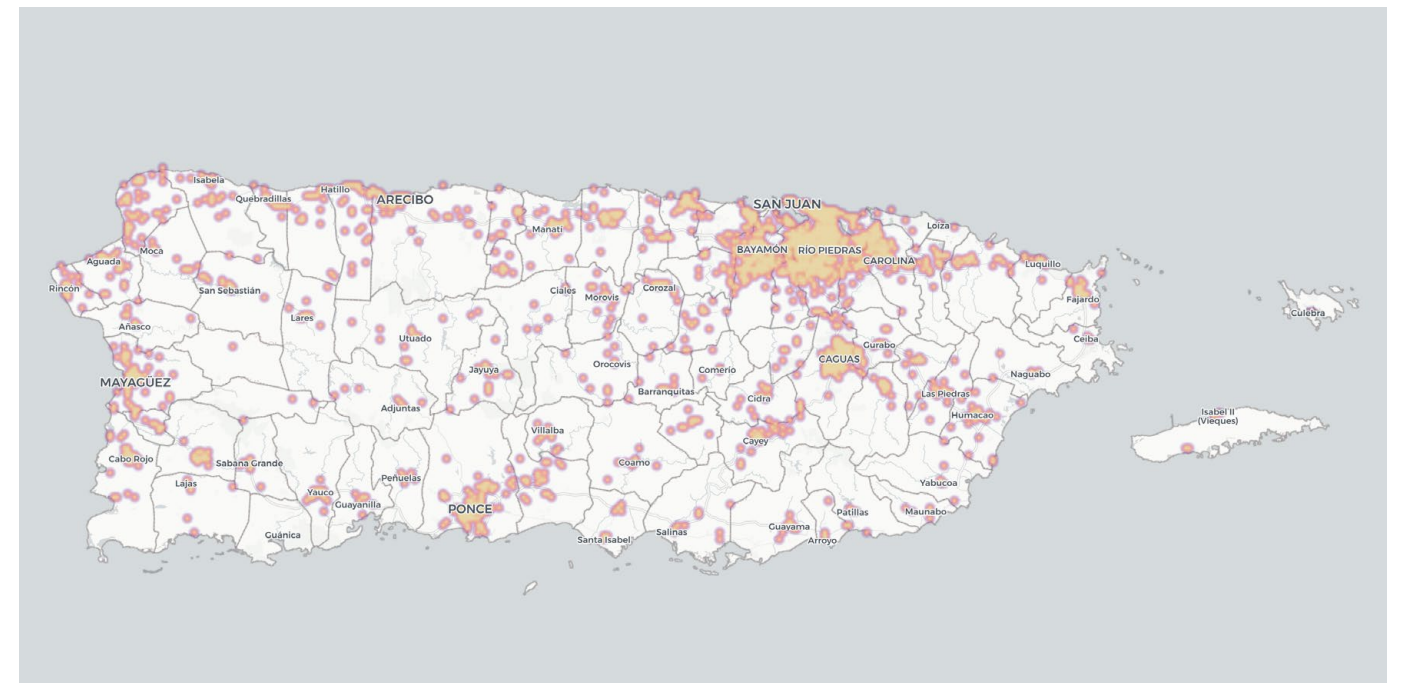
As part of the project, Sound Diplomacy developed a mapping of assets from the Cultural and Creative Industries in Puerto Rico. All assets are included and mapped on this [interactive map tool](#) developed specifically for Puerto Rico. On this zoomable tool, users can see a heat map of assets, by municipality within Puerto Rico, and click on individual assets to see more information about each one. Each sector (books & press, music recording & publishing, etc.) is color-coded and can be singled out or aggregated for a wider view.⁶⁹

The data obtained through this exercise has also informed the findings from the Economic Impact Assessment.

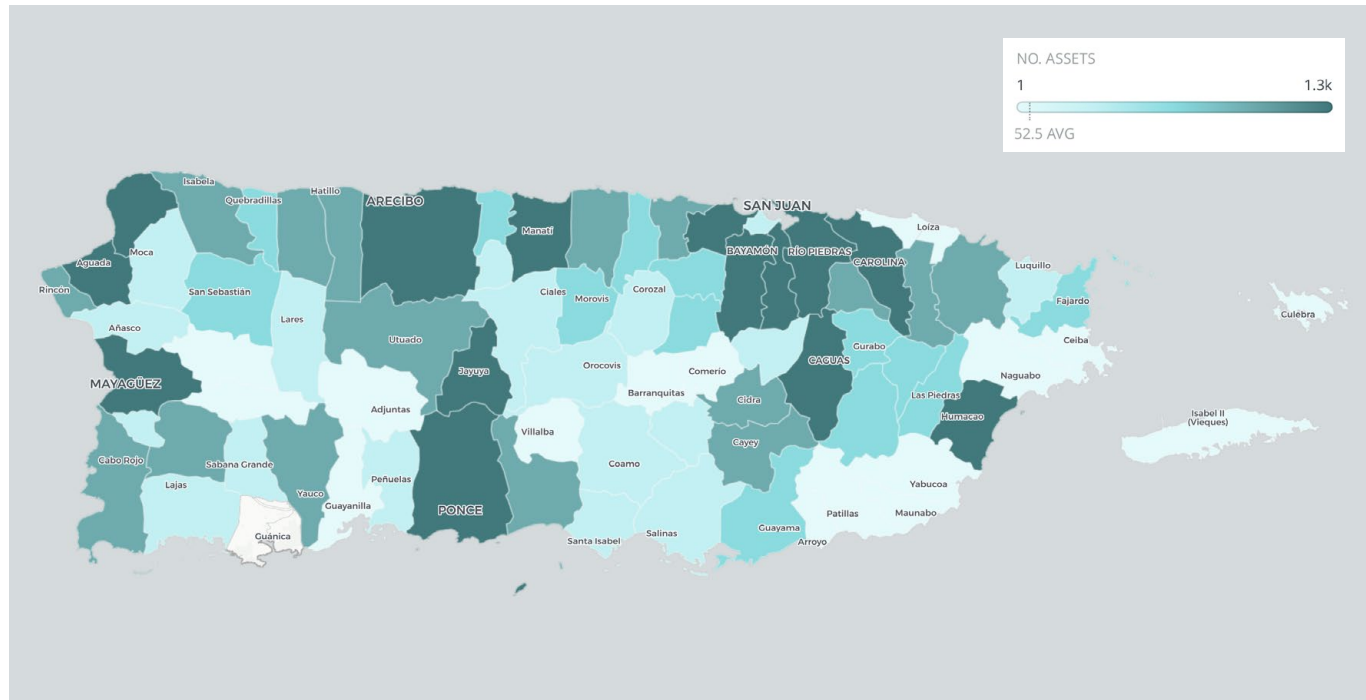
The interactive map contains **three types of heat maps**, each of which can be activated with the check box:



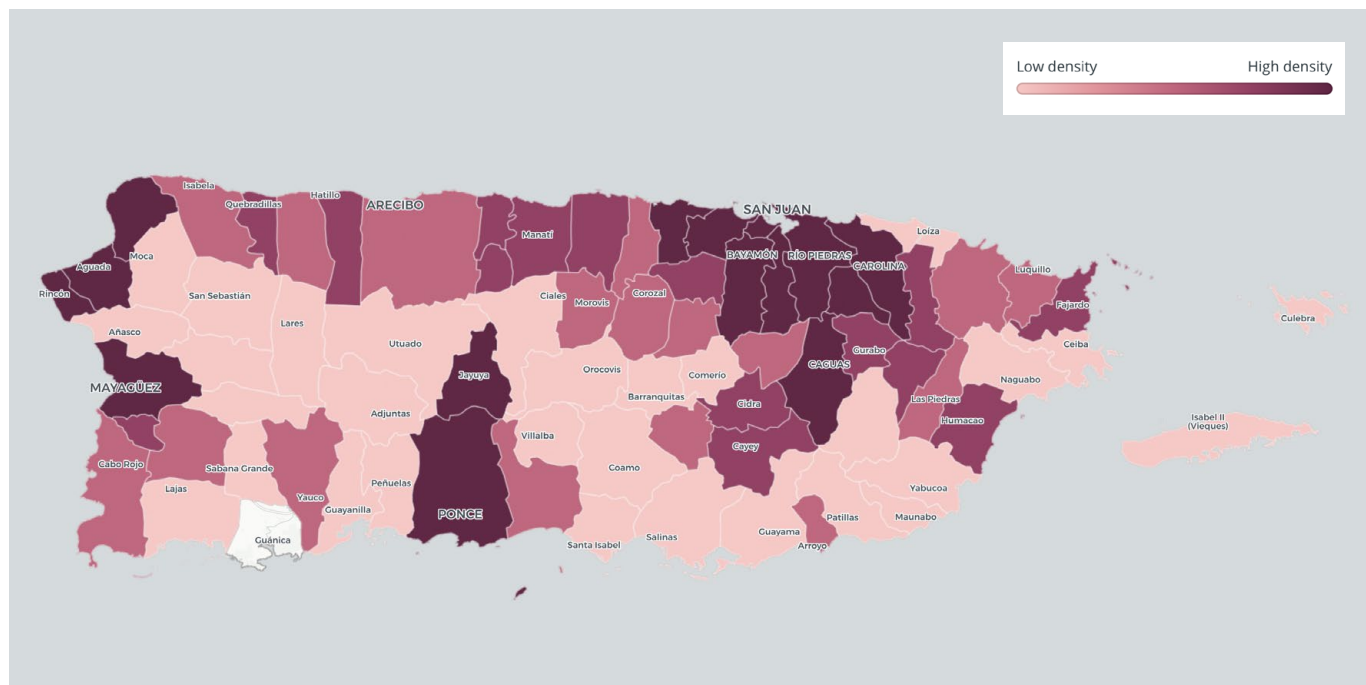
CLUSTER HEAT MAP: THIS IS A VISUAL AID THAT SHOWS THE CLUSTERS OR GROUPS OF ASSETS ACROSS THE MAP



NO. ASSETS HEAT MAP: THIS SHOWS THE CONCENTRATION OF ASSETS BY MUNICIPALITY. THE DARKER THE BLUE, THE HIGHER THE CONCENTRATION OF ASSETS IN THE MUNICIPALITY.



ASSETS DENSITY HEAT MAP: THIS SHOWS THE CONCENTRATION OF ASSETS PER SQUARE MILE OF EACH MUNICIPALITY. THE DARKER THE RED, THE HIGHER THE CONCENTRATION OF ASSETS IN THE MUNICIPALITY BASED ON ITS SIZE.



5. SWOT





Image © Unsplash/Siedhji Leon

STRENGTHS (INTERNAL)

GOVERNANCE AND LEADERSHIP

- There are numerous non-profit organizations working to promote the CCI in Puerto Rico.
- Centro de Economía Creativa and Mellon Foundation are working on strategies and proposals promoting multi-sectoral dialogue.
- PR already started designing a comprehensive program to support the Creative Industries.
- ICP is increasingly integrating CCI in its activities.
- Several urban areas significantly contribute to cultural activities by concentrating infrastructure.

INDUSTRY AND PROFESSIONAL DEVELOPMENT

- There is a substantial amount of talent within the CCI, both in terms of quality and quantity.
- Workers from the CCI earn on average 22% more than the rest of the economy (\$28.7k and \$23.6k respectively).
- With 44,667 direct employees, the CCI employs more people than industries such as construction or finance & insurance in Puerto Rico. In fact, 1 in every 10 employees in the local industries are employed in the CCI.
- On average, Freelancers in the CCI earn \$28.6k, 30% more than freelancers in the rest of the economy (\$21.9k).

- Organizations such as the Centro de Economía Creativa offer training and skills in business management for the creative sector and host networking events.
- Local institutions such as Puerto Rico University, Universidad del Sagrado Corazón, and Atlantic University, have strong culture-related academic programs; the latter is actively strengthening its offer.
- The proportion of highly-educated workers in the CCI is higher than the rest of the economy (61% and 51% respectively).

MARKETING, BRANDING AND TOURISM

- Discover Puerto Rico and ICP have done significant marketing efforts to promote cultural activities, for instance through their cultural agendas.

VISUAL ARTS & CRAFTS

- Puerto Rico has a long history of traditional crafts rooted in the island's Indigenous, Hispanic, and African heritage.
- There are a number of craft markets and festivals available in the country.
- The Puerto Rican government and various organizations provide support, incentives and resources to artisans, helping them preserve traditional crafts, develop new skills, and market their products effectively.

MUSIC RECORDING & PUBLISHING

- Puerto Rico is home to key players in music production and management, with Rimas Music being one of the most relevant examples.

CULTURAL & NATURAL HERITAGE

- Puerto Rico is home to several historical museums and sites, including a UNESCO World Heritage Site.
- ICP is well integrated into the US National Assembly of State Arts Agencies.

PERFORMANCE & CELEBRATION

- There is a variety of established music venues such as: Coca-Cola Music Hall, Coliseo de Puerto Rico, La Respuesta, Vivo Beach Club, El Local, EL Boricua, El Bonanza, El Portal de El Yunque, George Music Lounge.

- There are many festivals and popular celebrations across the island (83 festivals according to the mapping).
- There are informal clusters of artists, particularly in music, who are very supportive of each other and who collaborate to highlight existing and new talent.
- The Colegio de Productores de Espectáculos Públicos regulates event promotion activities and protects local promoters.
- The performing arts sector is responsible for the biggest economic multiplier effect in the industry.

BOOKS & PRESS

- Puerto Rico has a rich literary tradition, with a diverse range of authors writing in both Spanish and English.
- There is a new wave of independent publishing that is less centralized in the capital.

AUDIOVISUAL & INTERACTIVE MEDIA

- Out of all CCI sectors, the Audiovisual and Interactive Media one makes the most significant economic impact on the island.
- The island has managed to attract world class productions.
- There is a growing, high-quality workforce in the audiovisual and digital production sector.
- Film studies in the country maintain a high level of quality.
- Stakeholders underscored the importance of current efforts to support the videogames industry in the country, such as the Puerto Rico Game Developers Association (PRGDA).

DESIGN & CREATIVE SERVICES

- Amongst all CCI, the Design and Creative Services sector has the second-most significant economic impact on the island.



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WEAKNESSES (INTERNAL)

GOVERNANCE AND LEADERSHIP

- Stakeholders unanimously acknowledged a widespread absence of government support for the CCI in Puerto Rico, along with historical inconsistency and lack of continuity in this support and a lack of understanding from the government about what the CCI sectors are.
- Most stakeholders agreed that ICP has accessibility and transparency issues.
- Funding opportunities are perceived as not being accessible and inclusive and they are even perceived to favor certain individuals and organizations.

- Even when funding opportunities are available, creatives express that they don't have the necessary knowledge on how to apply and how to comply with the requirements that funding programs ask of them.
- Despite the global success of art and music from Puerto Rico, there are no concerted efforts or programs to promote local and foreign investment in the Creative Industries, nor to promote local artists abroad and export their work.
- Public institutions focused on culture are not consistently funded, nor do they have significant relevance in the governmental structure.

- The law on Creative Industries has not been properly enforced.
- Licensing, permits, funding and other processes connected to the CCI are perceived as too bureaucratic and thus inefficient. This makes it difficult for creatives to access government resources.
- There is poor availability of maps of resources, online data, and transparency regarding the functioning of CCI.
- There is no current initiative connecting CCI and urban planning, such as a planned creative district.

INDUSTRY & PROFESSIONAL DEVELOPMENT

- Compared to the overall economy in Puerto Rico, the CCI has a higher density of small-sized businesses and a higher proportion of self-employment.
- A notable absence exists in terms of industry intermediaries, organizations, and professionals committed to fostering the development of artists.
- Stakeholder engagement revealed that the CCI in Puerto Rico operates predominantly informally, thereby constraining its potential for growth.

- There is a lack of professional associations in most sectors.
- Alternative funding sources, such as foundations, are perceived as scarce and not diverse enough.
- Cultural organizations face challenges due to differences in tax-exempt status compared to the 50 states, impacting their eligibility for federal funding (for instance during disasters).

- There is a lack of knowledge among the stakeholders about Act 60 and how to access the benefits it can provide.
- Artists and creatives feel that they are not paid fairly when hired for their services or when selling their creations.
- Arts education is hard to access in elementary, middle and high school levels.
- Although there are university programs that cover the CCI, there is a lack of programs focused in areas like business management or cultural marketing.

- There is a higher proportion of male workers in the Cultural and Creative sector (61%), compared to the rest of the economy (52%) in Puerto Rico. This might indicate entry barriers for women in the industry.
- Men earn more than women in the Cultural and Creative sectors, and workers that identify themselves as White earn 27% more than workers that identify themselves as Black/African American, showing disparities in terms of gender and race inside the CCI.

MARKETING, BRANDING & TOURISM

- Despite recent efforts, there is a notable absence of comprehensive initiatives that connect the tourism and cultural sectors, and tourism and culture agencies do not work hand in hand.
- There is no strategy that is focused on exporting cultural and creative goods and services.
- There is a generalized lack of comprehensive coverage from media outlets on CCI activities.

VISUAL ARTS & CRAFTS

- There is a lack of support for new creators and innovative projects.
- There is also a lack of arts residency programs to support creation.
- Stakeholders agreed that craft markets and activities are too concentrated in the capital.
- Most craft workers are informal and not recognised by established spaces.
- Lack of homogeneity of the certification for craft products.
- Lack of interest in visual arts, particularly among younger demographics.

MUSIC RECORDING & PUBLISHING

- Stakeholders in the music industry feel that the recording infrastructure is not sufficient to meet the sector's needs.
- Artists in music recording feel that there is an important gap between top artists and independent artists and creatives, showing that opportunities are unevenly distributed.
- Stakeholders agreed that there are not enough independent or smaller studios easily accessible to upcoming artists.

CULTURAL & NATURAL HERITAGE

- Without sufficient financial resources, it has become challenging to undertake meaningful initiatives for the conservation and promotion of local heritage inclusively and innovatively.
- Stakeholders agreed that museums are not approachable and accessible to all publics and lack audience development programs.

PERFORMANCE & CELEBRATION

- High taxation on ticket sales for live events makes it difficult for promoters to sell tickets and for consumers to afford them.
- Live entertainment licensing lacks transparency and inclusivity.
- There's a disconnection between venues and event promoters, with the latter group expressing that they are usually the ones who have to carry all the costs and the risks of an event.
- There is no insurance that properly protects the promoters that are facing these risks.
- Promoters are required to obtain a license. This process is perceived to be too cumbersome and, at some stages, not inclusive of smaller up-and-coming promoters and event producers.
- There is a shortage of booking agents who can help promote

- local productions abroad. This is due to lack of education in this field, but also a lack of interest from artists and bookers who have already migrated to the U.S. or other markets.
- Stakeholders agreed that there is not enough support for independent venues and theaters.
 - There are no audience development programs in place.
 - Stakeholders highlighted the need for more diverse spaces for performances: making use of underutilized and non-conventional spaces for live events such as historical buildings and natural sites.
 - Law 223 on Puerto Rican Autochthonous Music poses a challenge to incorporating new musical endeavors into events such as the *fiestas patronales*.
 - *Fiestas patronales* program renowned artists and sometimes compete with private events.

AUDIOVISUAL & INTERACTIVE MEDIA

- Financial incentives mainly benefit international productions or companies.
- There's a feeling among creatives in the film sector that there are not enough funding resources to promote the creation and establishment of new film studios in the island, and that the \$38 million cap for funding to the sector might be an underlying issue.

BOOKS & PRESS

- Businesses in the sector are facing increased costs in purchasing paper with the quality requirements which is affecting their income and production.
- There are no reading promotion campaigns or programs.



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OPPORTUNITIES (EXTERNAL)

GOVERNANCE AND LEADERSHIP

- Geographic closeness and collaboration opportunities with both the U.S. and Latin America.
- Spanish and English are two of the four most spoken languages in the world.
- The Puertorrican diaspora, especially those working in the CCI, are highly successful in the U.S. and Latin American markets. Initiatives such as Junte Boricua aim at reinforcing the link with the diaspora.
- Downtown San Juan has several historic buildings that have been abandoned for some time; this could represent an opportunity to create more arts spaces.

INDUSTRY & PROFESSIONAL DEVELOPMENT

- There are accelerator hubs and incentives for other sectors, such as the tech sector.
- Funding opportunities from U.S. foundations like the Flamboyant Foundation are increasingly available.
- DDEC offers incentives that could be more effectively utilized by all the CCI sectors.

MARKETING, BRANDING & TOURISM

- The tourism industry is booming, with Discover Puerto Rico and the Tourism Company leading the way.
- Puerto Rican artists on the international stage represent a unique and influential brand tied to the rich cultural heritage of Puerto Rico.
- Puerto Rico is rich in both cultural and natural heritage, being the home to diverse ecosystems, including rainforests, mountains, and beaches that make the island a popular destination.



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THREATS (EXTERNAL)

GOVERNANCE AND LEADERSHIP

- Changes in government and political party priorities make the CCI vulnerable.
- ICP is currently running mostly on ARPA and other federal emergency funds which run out in June 2025, and there are no clear plans on how to ensure financial stability from that point onwards.
- DDEC is not as involved as it could be in the development of CCI.
- Most foreign investment goes into tech but not into culture, and agencies that work in investment attraction are inadvertently widening this gap.

INDUSTRY & PROFESSIONAL DEVELOPMENT

- There is a shortage of press coverage of Puerto Rico's CCI inside and outside the island.
- Transportation and parking infrastructure, specifically during events, is not sufficient.
- The Jones Act and other cabotage regulations have caused elevated shipping expenses which have affected commerce and exports.
- Crisis in the public education system impacts the CCI, especially the development of future audiences.
- Puerto Rico suffers from talent drains, with a large number of artists and cultural agents migrating to the US.
- The geographical context of the island restrains the development of certain sectors, especially theater and craft in relation to costs of transportation and export.

MARKETING, BRANDING & TOURISM

- Stakeholders pointed at the tourism sector as one of the island's primary sources of environmental pollution.



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7. ACTION PLAN (AND IMPLEMENTATION TIER)

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GENERAL RECOMMENDATIONS

SHORT TERM (1-12 MONTHS)	MEDIUM TERM (12-24 MONTHS)	LONG TERM (24-48 MONTHS)
GOVERNANCE AND LEADERSHIP		
RECOMMENDATION #1 Name a CCI Coordinator within DDEC and Create a CCI Network		
	RECOMMENDATION #2 Create and Implement an Export Strategy	
	RECOMMENDATION #3 Create a fund for the CCI	
INDUSTRY DEVELOPMENT		
RECOMMENDATION #4 Create a "One-Stop Shop" Centralizing All the Information Related to the CCI		
RECOMMENDATION #5 Improve Access to and Knowledge of Tax Credits		
	RECOMMENDATION #6 Support the Creation of Industry Associations	
		RECOMMENDATION #7 Develop CCI Education
		RECOMMENDATION #8 Develop a Pool of Industry Intermediaries and Professional Support in the CCI
		RECOMMENDATION #9 Advocate for the Creation of Job Creation Programs and the Freelancers Support
	RECOMMENDATION #10 Advocate for the Creation of an Official Observatory	

SHORT TERM (1-12 MONTHS)	MEDIUM TERM (12-24 MONTHS)	LONG TERM (24-48 MONTHS)
MARKETING, BRANDING & TOURISM		
	RECOMMENDATION #11 Create a Branding Strategy to promote Puerto Rico's CCI to the world	
	RECOMMENDATION #12 Better Integrate CCI into Tourism Promotion Activities	
	RECOMMENDATION #13 Expand Cultural and Entertainment Districts	
		RECOMMENDATION #14 Create a "One-Stop Shop" Centralizing All the Information Related to the CCI
	RECOMMENDATION #15 Create Online Audience Development Strategies	
RECOMMENDATION #16 Create an award for the most innovative creative projects in Puerto Rico		
		RECOMMENDATION #17 Create a Series of Industry Forums, Events and Conferences

SECTOR-SPECIFIC RECOMMENDATIONS

SHORT TERM (1-12 MONTHS)	MEDIUM TERM (12-24 MONTHS)	LONG TERM (24-48 MONTHS)
VISUAL ARTS AND CRAFTS		
		RECOMMENDATION #18 Repurpose Old Buildings into Arts Galleries or Other Arts Spaces
	RECOMMENDATION #19 Support the Craft Sector Through a Homogenized and Inclusive Label Program	
MUSIC RECORDING		
		RECOMMENDATION #20 Support Music Production Through a Targeted Tax Incentive
RECOMMENDATION #21 Partner with the Tech Sector to Create Opportunities for Musicians		
CULTURAL AND NATURAL HERITAGE		
RECOMMENDATION #22 Create a Heritage Task Force Focused on Innovative Practices		
	RECOMMENDATION #23 Create Connections Between Natural Heritage and Cultural Activities	

SHORT TERM (1-12 MONTHS)	MEDIUM TERM (12-24 MONTHS)	LONG TERM (24-48 MONTHS)
PERFORMANCE AND CELEBRATION		
	RECOMMENDATION #24 Advocate for a More Inclusive and Efficient Licensing Framework for Live Entertainment	
	RECOMMENDATION #25 Work Towards a More Inclusive and Diverse Ticketing Market	
AUDIOVISUAL AND INTERACTIVE MEDIA		
		RECOMMENDATION #26 Advocate for a More Diverse and Impactful Incentive Program for the Audiovisual Industry



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8. CONCLUSIONS



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Puerto Rico is one of the most vibrant scenes for culture and the creative industry in the American continent.

For decades, Puertorrican music and entertainment have invaded the media and cultural outlets in Latin America and the United States and the island has become the birthplace of world-level artists that range from Benicio del Toro to Joaquín Phoenix and from Ricky Martin to Bad Bunny. Puerto Rico is a synonym of arts and culture in every corner of America and the world.

As the present report shows, even though artists in Puerto Rico have done a successful job in positioning their work worldwide, there are a series of challenges that are hindering the country's capacity to reach even more markets and to make CCI the core

of local development. Governmental disconnection within its institutions but also with the citizenship has created a scenario where artists need to work harder than needed to make themselves known.

In this context, and through this report, Sound Diplomacy aims to provide InvestPR and the entire country of Puerto Rico with a set of tools and actionable recommendations that will help invigorate the CCI, and that will equip government institutions, local cultural organizations and creatives across the island with sufficient ideas and strategies to increase and improve their opportunities.

Puerto Rico has the quality in its creatives and the resources in its infrastructure, all it needs is a significant and increased commitment from local stakeholders to boost the CCI, and to act with conviction to put them at the center of the social and economic development of Puerto Rico, as well as to use it as the vehicle to continue growing as a cultural and creative beacon for the United States and Latin America, and even the world.



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- Information of the Music Recording & Publishing is included as an indicative figure, however the data is not representative of the universe due to the low number of observations of the sample in the sector.
- The interactive map can be filtered by sector, sub-sector, and municipality, by clicking on the sector, sub-sector, and municipality name in the menu on the right. To filter categories that do not appear on that menu (grouped as "other"), click on "search in...." and then type the name you want to filter. It is also possible to filter several categories simultaneously. If you are facing any issues when opening the Map in Carto, please try to eliminate all the cookies from your browsers. Alternatively, try copying the link and opening it in a different tab or browser.

ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual who worked with us, took an interest in the report, attended a roundtable and shared information. Your participation and input has been invaluable and the work could not have been done without it.

ABOUT SOUND DIPLOMACY

Sound Diplomacy is a global research and strategy consultancy committed to building and supporting sustainable ecosystems that bring economic development to people, places and cities. They provide research and recommendations to businesses and policymakers to help them make informed decisions on the best use of places and how to stimulate economic, social and cultural growth. Sound Diplomacy's team of economists, analysts, researchers and consultants is based across the UK, Europe, North America and Latin America and has delivered results across six continents, in over 100 cities and 25 countries. For more information, please visit www.sounddiplomacy.com

ABOUT INVERSIÓN CULTURAL

Inversión Cultural is Puerto Rico's leading non-profit entity whose mission is to strengthen the cultural and creative ecosystem through research, education and consulting for art, culture and creative industries entities. Since 2008, the organization has actively participated in public policy design efforts, research to strengthen the ecosystem, economic impact measurement, business and project incubation, and support for existing entities. Their compass points towards the visibility of good practices, cooperation and access to international markets for the cultural and creative sector in Puerto Rico. For more, visit: www.inversioncultural.com

ABOUT 71 ASSOCIATES

71 Associates is a nonprofit organization to help experimental musicians in Puerto Rico overcome any problem, barrier or hurdle that they can face when participating in the Puerto Rico and Caribbean markets. The organization leverages over 20 years of experience in the music and entertainment business to help identify opportunities and solutions for its beneficiaries who include artists, promoters, managers and other related professionals, and who receive advice and orientation on diverse areas related to their work. Thanks to their expertise, 71 Associates is in a great position to offer insights on the most immediate challenges posed to the music and entertainment industries in Puerto Rico. Find more information at: www.71associates.com



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