

July 2023



Country Opinion Surveys

FY 2023 **Jamaica** Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

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Objectives

This survey was designed to assist the World Bank Group (WBG) in gaining a better understanding of how stakeholders in Jamaica perceive the WBG. The survey explored the following questions:

1. What areas of development are perceived to be the most important? Have the priorities changed over the past three years?
2. What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Jamaica's development priorities, and other key indicators? Are opinions improving or declining?
3. How is the WBG perceived as a development partner? Are opinions improving or declining?
4. What do key stakeholder value the most and the least when it comes to the WBGs work at the country level? What are the priorities looking forward?
5. What opinion do key stakeholders have of the WBG knowledge products and their quality? Are opinions improving or declining?
6. What are the preferred communication channels and which channels are reported to be used the most? Are there differences among stakeholder groups in terms of preferred channels?
7. What key topics that the WBG communicates do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?

Overall Context

“Help Jamaica to fight crime, violence and corruption, and to have more tailored programmes for the country.”

Government Respondent

“The World Bank Group could ensure that it has preparatory consultations with prospective stakeholders and beneficiaries (where possible) prior to the development and implementation of its programmes and projects, as there are valuable lessons to be learnt from prior implementation... as well as understanding the culture (business, economic, social) and context within which an ideation will be brought to life. This will ensure that resources are channeled in the right direction at the right time.”

Government Respondent

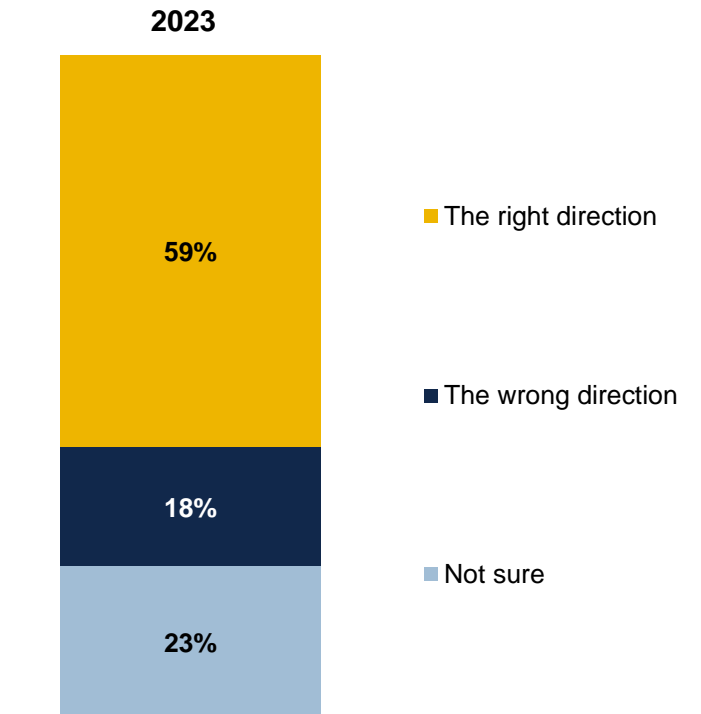


Respondents Think Jamaica is Headed in the Right Direction

A majority of respondents in Jamaica indicated that the country is headed in the right direction.

Similarly, in fiscal year (FY) 2019, most respondents indicated that they were “very optimistic” (30%) or “somewhat optimistic” (53%) about the future.

Country direction



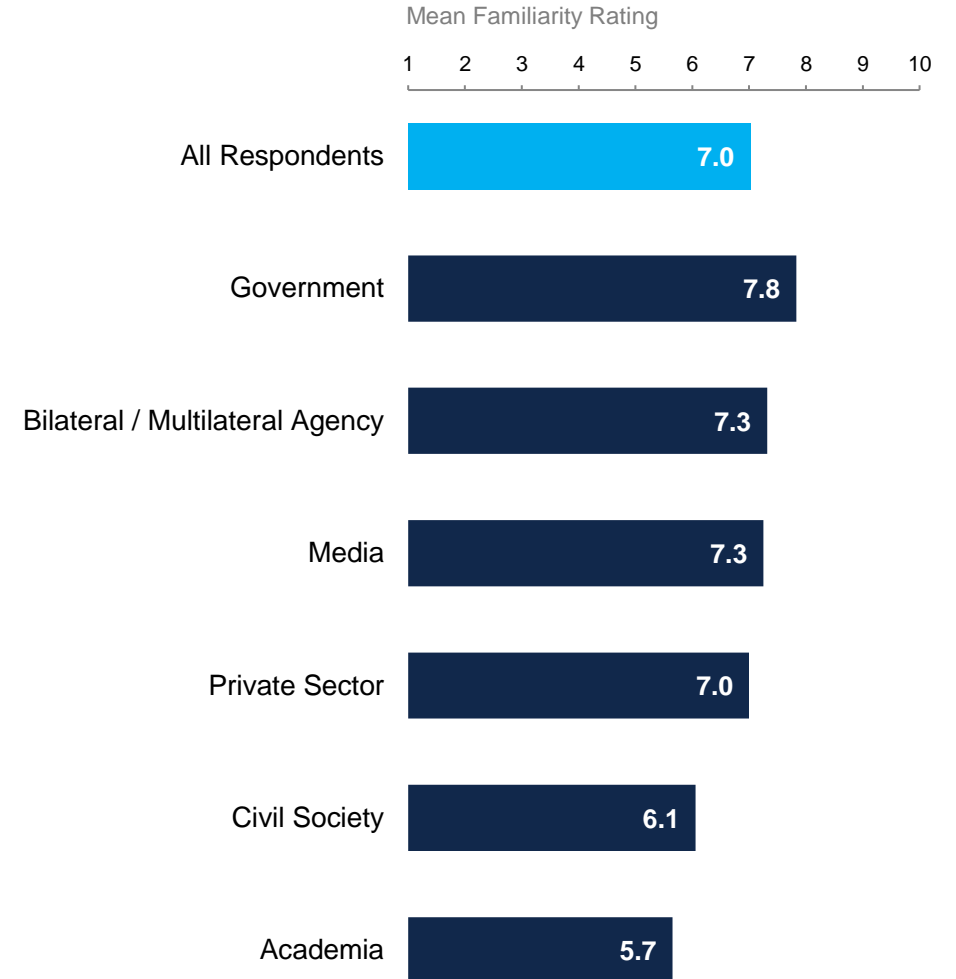
Familiarity with the World Bank Group

Year comparison: Respondents in this year's Country Survey reported statistically similar levels of familiarity with the World Bank Group as in FY19:

Mean familiarity: FY23 = **7.0**
FY19 = **7.2**

Collaboration: Respondents who collaborate with the World Bank Group (WBG) reported significantly higher levels of familiarity with the institution's work:

Mean familiarity: Collaborate with WBG = **8.2**
Do not collaborate = **6.4**



Significantly different between stakeholder groups



How familiar are you with the work of these organizations in Jamaica:
The World Bank (International Bank for Reconstruction and Development [IBRD])?
Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar)

Familiarity with the World Bank Group

Respondents reported higher levels of familiarity with the Caribbean Development Bank (CDB), the European Union (EU), the Inter-American Development Bank (IDB), the International Monetary Fund (IMF), and the United Nations (UN) than the World Bank.

Year comparison: Respondents in this year's Country Survey reported significantly higher levels of familiarity with the IDB and the CDB than in FY19:

IDB Mean familiarity: FY23 = **7.7**
FY19 = **7.1**

CDB Mean familiarity: FY23 = **7.2**
FY19 = **6.5**

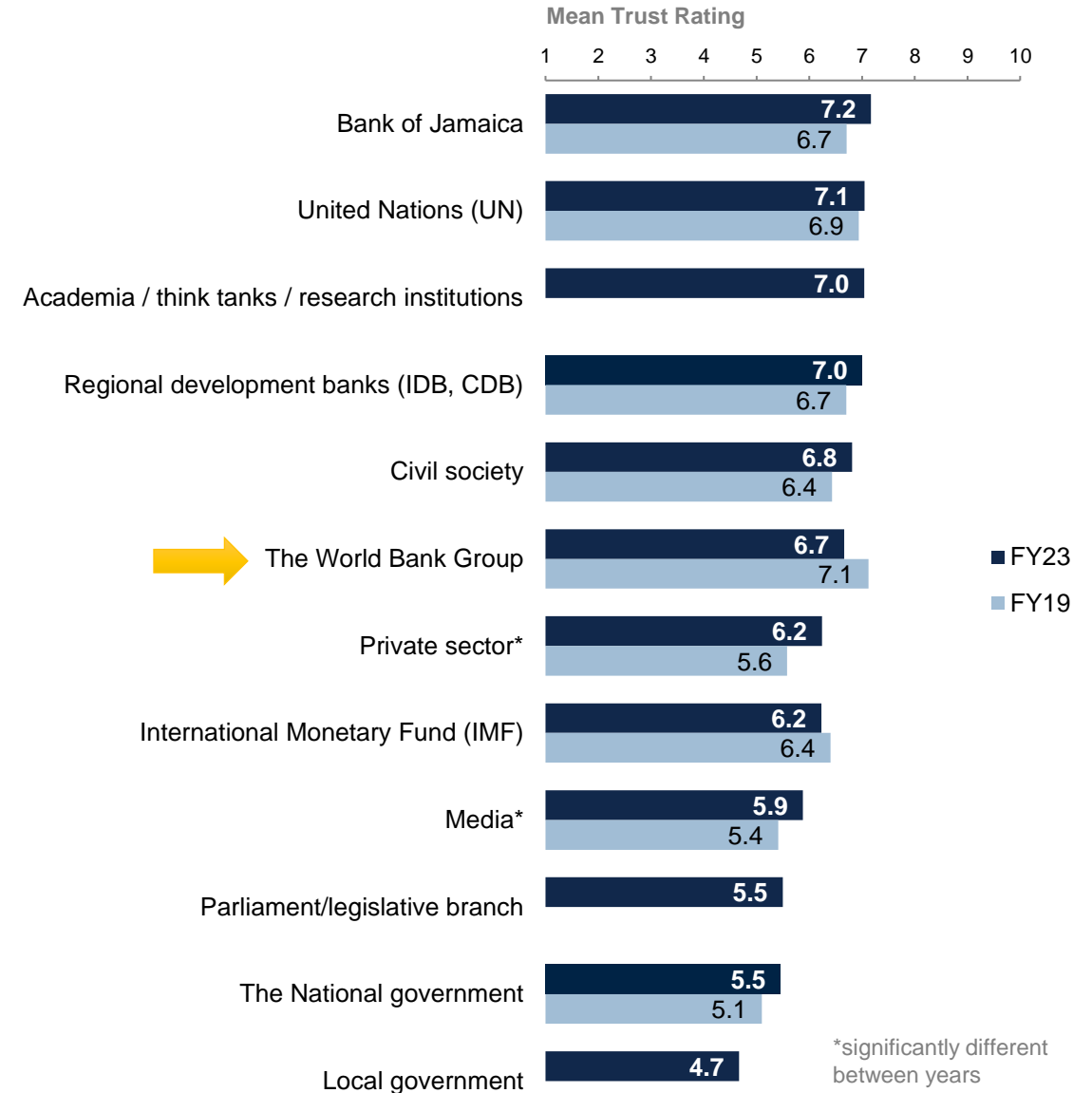


How familiar are you with the work of these organizations in Jamaica?
Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar)

Trust in Institutions

The Bank of Jamaica, the UN, academia, and regional development banks were among the most trusted institutions in Jamaica from among those studied.

At the same time, the media, Parliament, and the local and national governments were the least trusted institutions, according to respondents.



To what extent do you trust each of the following groups to do what is right?
Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

World Bank Group's Support for Development Areas

“[We need] help to build capacity in the public service around evaluation and measurement. Ensure accountability in the use of government resources. Help to deal with issues related to productivity.”

Civil Society Respondent

“Strongly support initiatives aimed at building sustained innovation policies, practices, cultures, frameworks and environments.”

Private Sector Respondent



Development Areas for WBG Focus

Education and **crime/violence** were the top areas in FY23 identified by stakeholders. They would like the WBG to focus its resources in these particular areas. Both increased by more than 20 percentage points since FY19.

Agriculture, **climate change**, and especially **health** also grew in prominence in FY23, with nearly twice as many respondents selecting them from among the top development priorities this year as compared to FY19.

For the most part, the top areas selected as priorities for the WBG were consistent across stakeholder groups; however, education was significantly less of a priority for respondents from bilateral/multilateral agencies (20%) compared to respondents from other stakeholder groups. In addition, health and pandemic preparedness was significantly more of a priority for respondents ages 35 and younger (75%) as compared to older respondents.

IMPORTANT NOTE: The overall increase in percentages is partially attributable to a change in methodology: In FY19, respondents could select up to 3 priorities, but in FY23 they could select up to 5. Also, two big cross-cutting areas, Economic Growth and Poverty Reduction (#2 and #3 in FY19), were removed from the list of options in FY23.

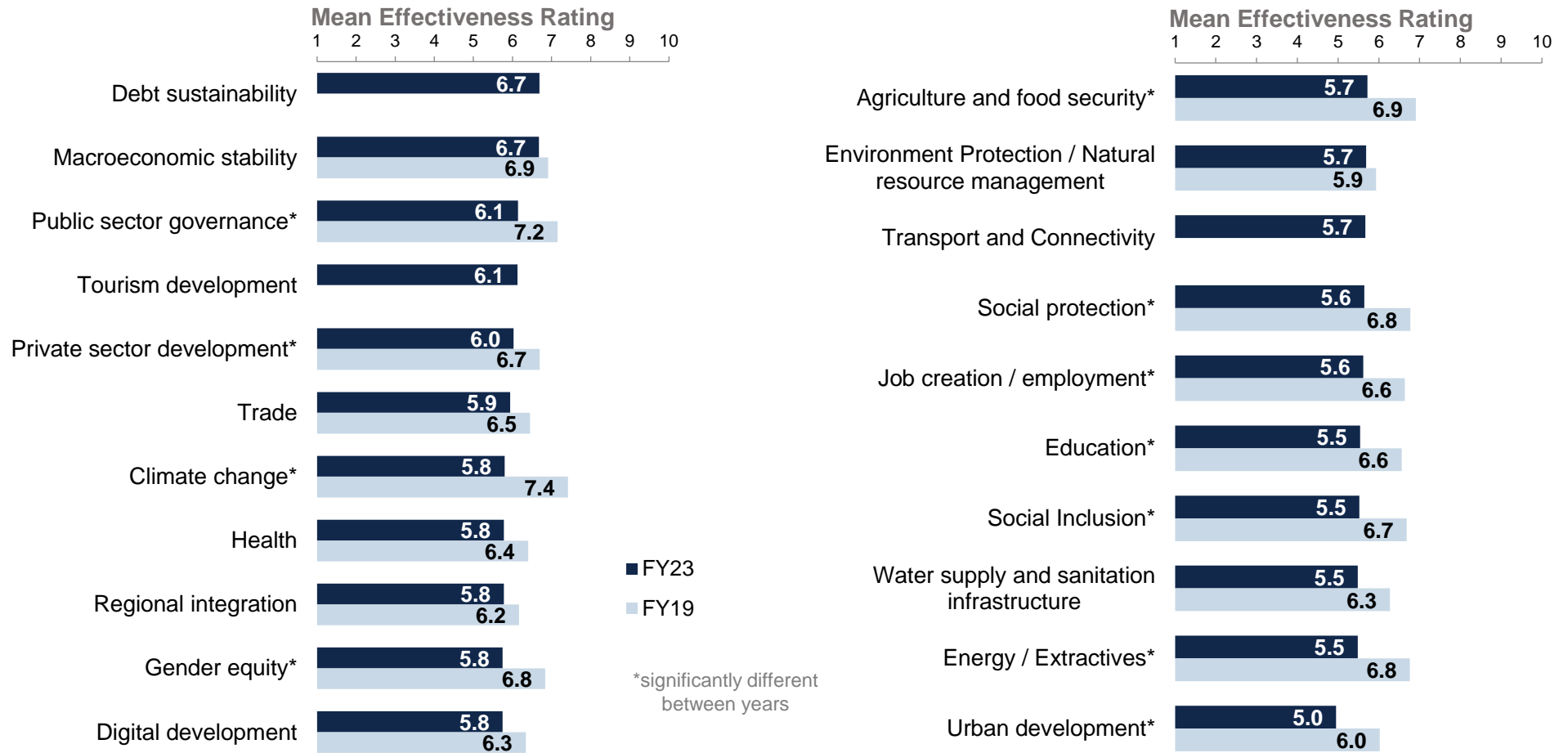


FY23: Which areas should the WBG prioritize in its work in Jamaica to have the most impact on development results in the country? (Choose no more than 5) (N=137)
FY19: In which sectors do you believe the WBG should focus most of its resources (financial and knowledge services) in Jamaica? (Choose no more than 3) (N=170)

| | | Vs FY19 |
|---|-----|---------|
| Education | 47% | +25 |
| Crime and violence | 47% | +22 |
| Agriculture and food security | 39% | +20 |
| Climate change | 37% | +21 |
| Health, pandemic preparedness | 37% | +29 |
| Environment protection / Natural resource mgmt. | 28% | NA |
| Job creation / employment | 26% | +10 |
| Public sector governance | 25% | +18 |
| Energy / Extractives | 25% | +22 |
| Digital development | 22% | +18 |
| Social Inclusion | 21% | NA |
| Water supply and sanitation infrastructure | 19% | +11 |
| Macroeconomic stability | 18% | +4 |
| Social protection | 16% | +8 |
| Debt sustainability | 14% | NA |
| Private sector development | 13% | -3 |
| Trade | 12% | +6 |
| Transport and connectivity | 12% | +11 |
| Urban development | 10% | +6 |
| Gender equity | 7% | +6 |
| Regional integration | 4% | +6 |
| Other | 2% | = |
| Tourism development | 2% | NA |

Effectiveness of WBG's Support in Sectoral Areas

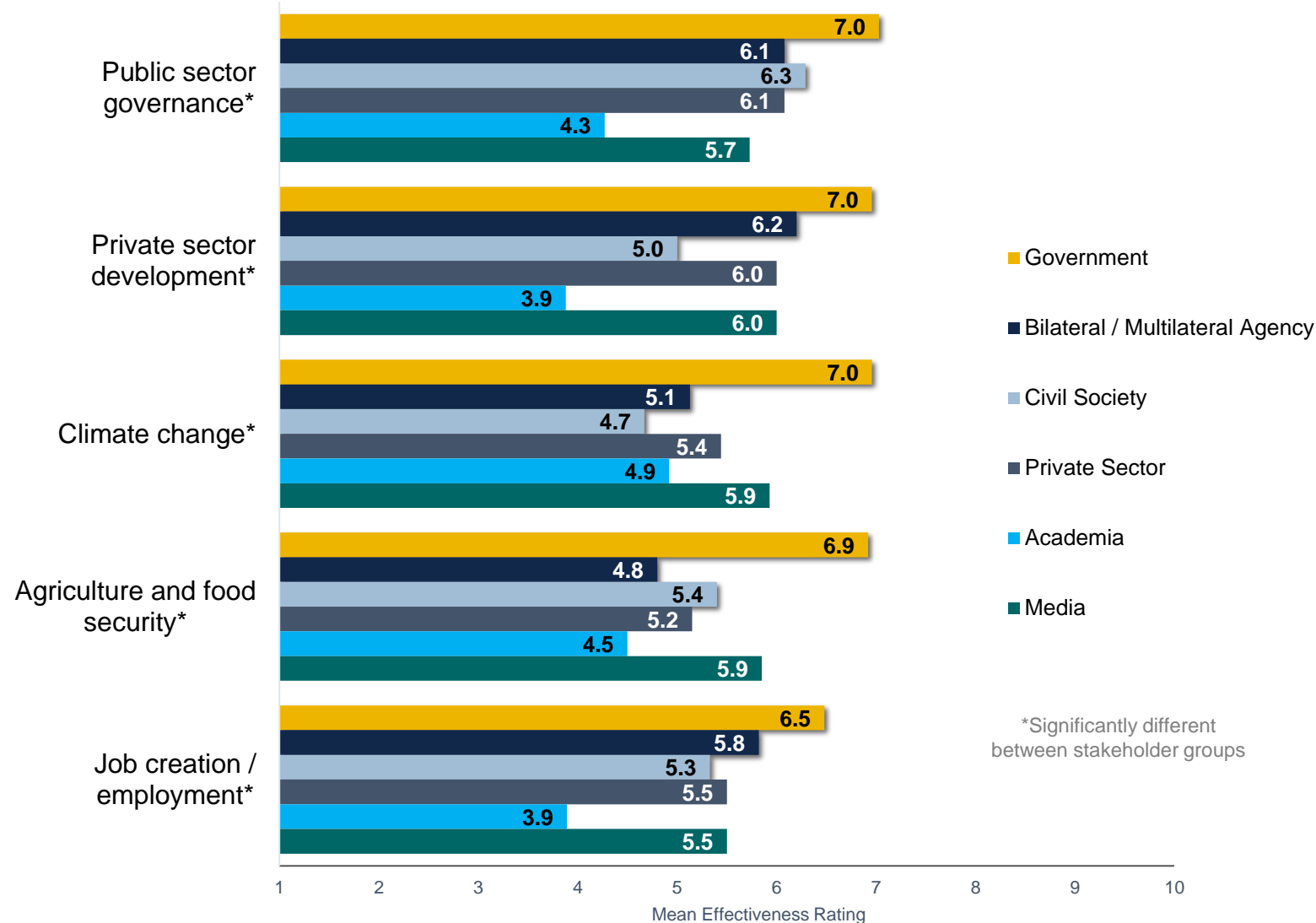
The WBG's work in the area of **debt sustainability** and **macroeconomic stability** in Jamaica received the highest effectiveness ratings. However, the ratings of the WBG's effectiveness across several sectoral areas were significantly lower in FY23 compared to FY19. Most notably, the ratings for **climate change** dropped.



How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Jamaica?
(If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know"),
Scale: 1-10 (1: Not effective at all – 10: Very effective)

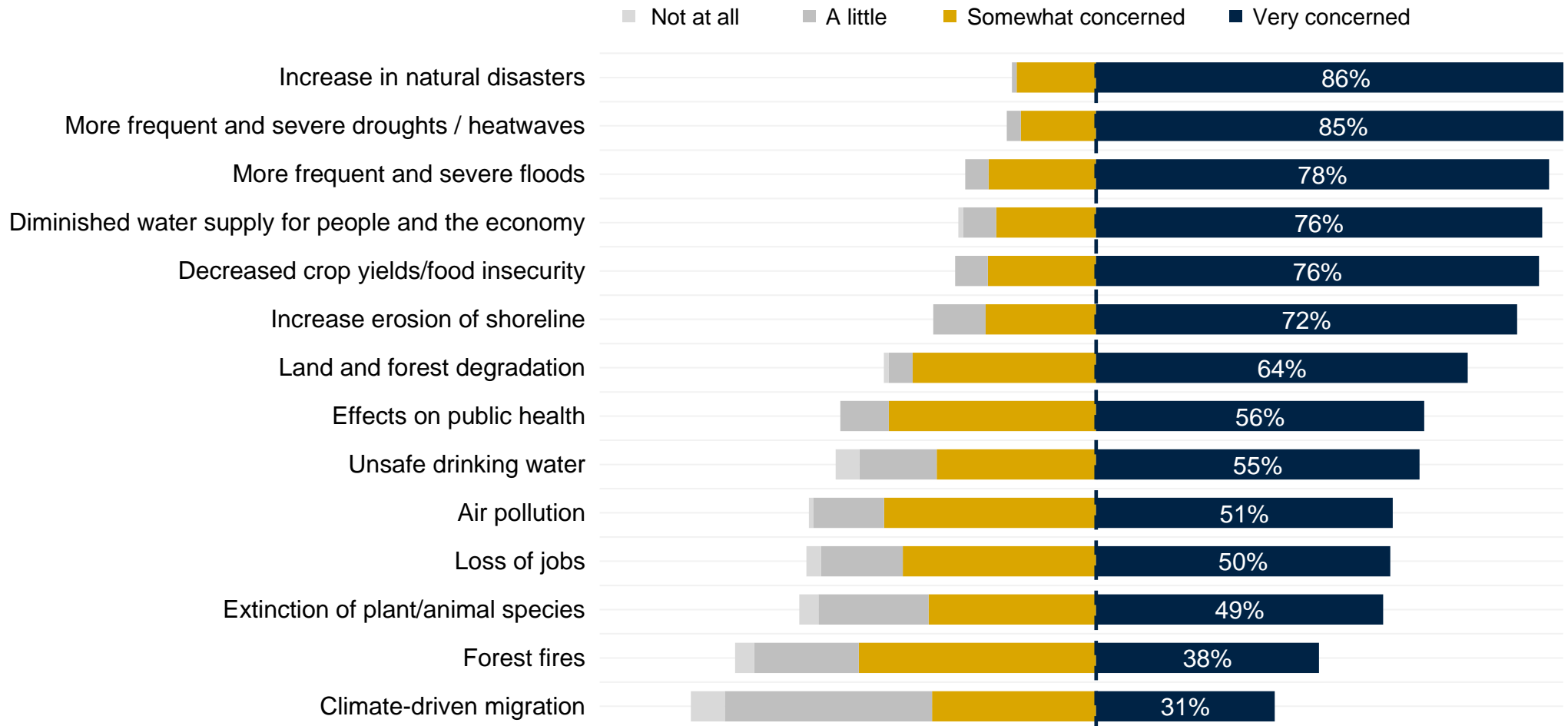
Key Sectoral Areas: Stakeholder Comparison

Government respondents gave the highest ratings for the WBG's effectiveness in key sectoral areas, whereas **academia** respondents gave significantly lower ratings for effectiveness. It should also be noted that **civil society** respondents gave the lowest ratings for the WBG's work on climate change. **Bilateral and/or multilateral agency** respondents gave their lowest effectiveness rating for the WBG's work in agriculture and food security.



Natural Disasters, Severe Droughts and Heatwaves were the Main Climate Change Concerns

Regarding the potential adverse impacts of climate change in Jamaica, the vast majority of respondents were very concerned about **increased natural disasters** (86%) and **more frequent and severe droughts and heatwaves** (85%). Floods, water supply, crop yields, and shoreline erosion were also of great concern to respondents.



Overall Attitudes toward the World Bank Group

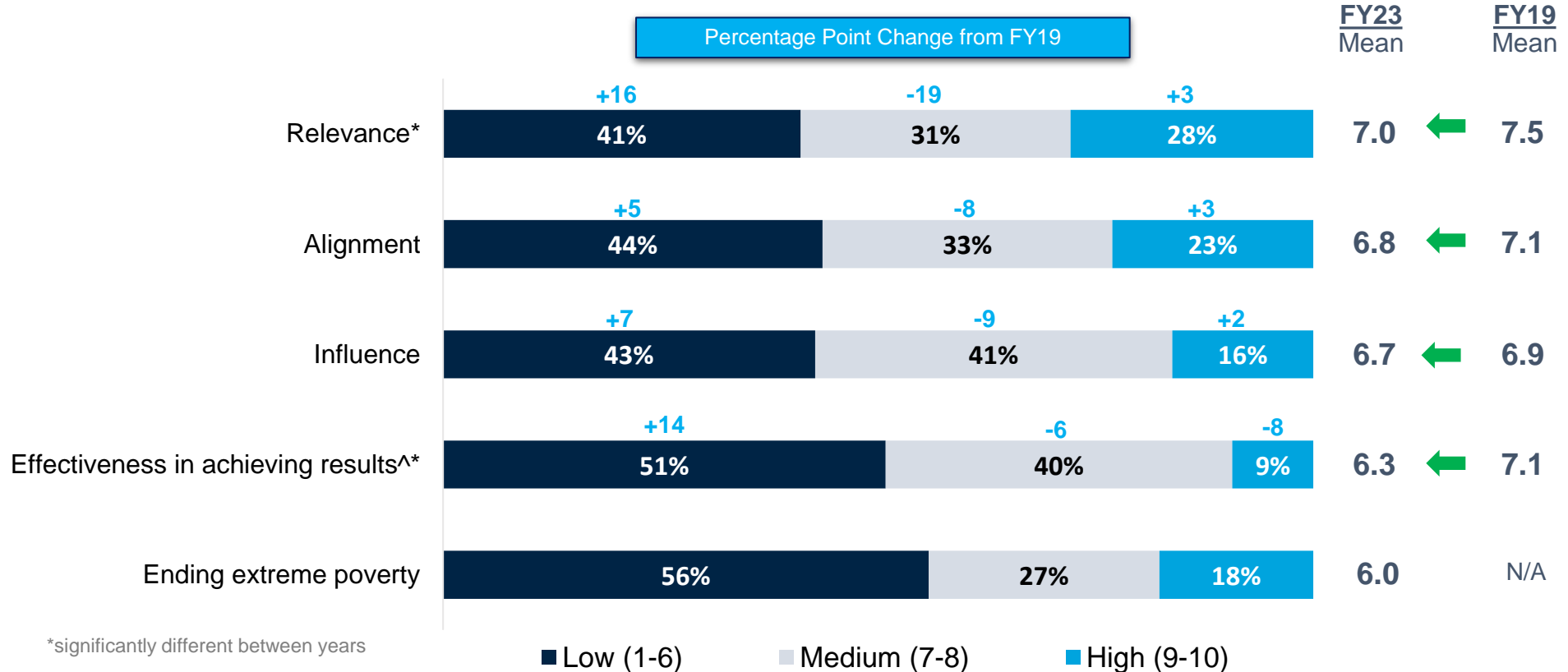
“The capacity of the Government of Jamaica agencies to implement [World] Bank-funded projects should be evaluated, and actions should be taken to enhance the effectiveness of these agencies. Community-based organizations and civil society, private sector companies, and independent consultants must be included in preparing World Bank-funded projects, ... [as well as] capacity-building activities ... to ensure effectiveness. Dialogue and Action Platforms should be established for the effective implementation of projects. A depository of independent consultants and service providers should be created to speed up the procurement process. Monitoring and evaluating project actions [is necessary] to ensure alignment with [the] objectives and Government policy programme. More surveys of this nature [are necessary].”

Private Sector Respondent



Key Performance Indicators

In FY23, there was a decline across key performance indicator questions, significantly so for the WBG's **relevance** and **effectiveness in achieving development results**. About a quarter of respondents gave the WBG high ratings (9 or 10 on a 10-point scale) for **relevance** and **alignment** with Jamaica's development priorities. However, a majority of respondents gave low ratings for the WBG's **effectiveness in achieving development results** and **ending extreme poverty** in Jamaica.



The World Bank Group currently plays a relevant role in development in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

The World Bank Group's work is aligned with what I consider the development priorities for Jamaica, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

To what extent does the World Bank Group influence the development agenda in Jamaica? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

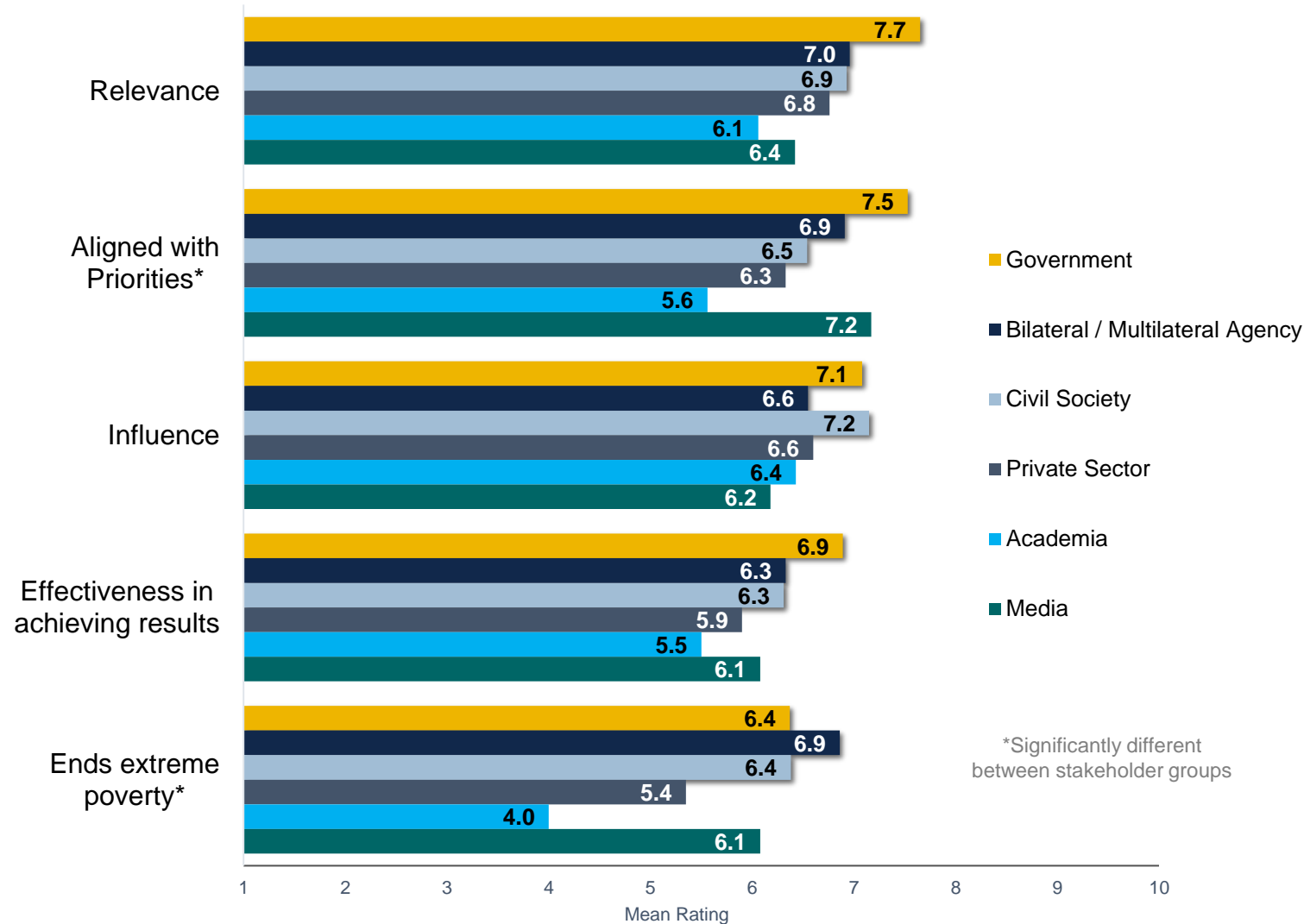
How effective has the World Bank Group been in achieving development results in Jamaica? Scale: 1-10 (1: Not effective at all– 10: Very effective)

The World Bank Group's work helps end extreme poverty in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

^A mean score of the two questions asked in FY19: Overall, please rate your impression of the World Bank Group's effectiveness in Jamaica. Scale: 1-10 (1: Not effective at all– 10: Very effective); To what extent does the World Bank Group's work help to achieve development results in Jamaica? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

Key Performance Indicators: Stakeholder Comparison

Respondents from the **government** and **bilateral or multilateral agencies** tended to have the most positive perceptions of the key performance indicators regarding the WBG's work in Jamaica. However, respondents from **academia** (who also reported the lowest levels of familiarity with the WBG) tended to have the least positive perceptions. Given these results, a targeted outreach strategy should be considered for engaging with those in academia and research centers in order to better inform them about the WBG's work in Jamaica. This could include sharing project results and partnering in selected activities.



The World Bank Group currently plays a relevant role in development in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

The World Bank Group's work is aligned with what I consider the development priorities for Jamaica, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

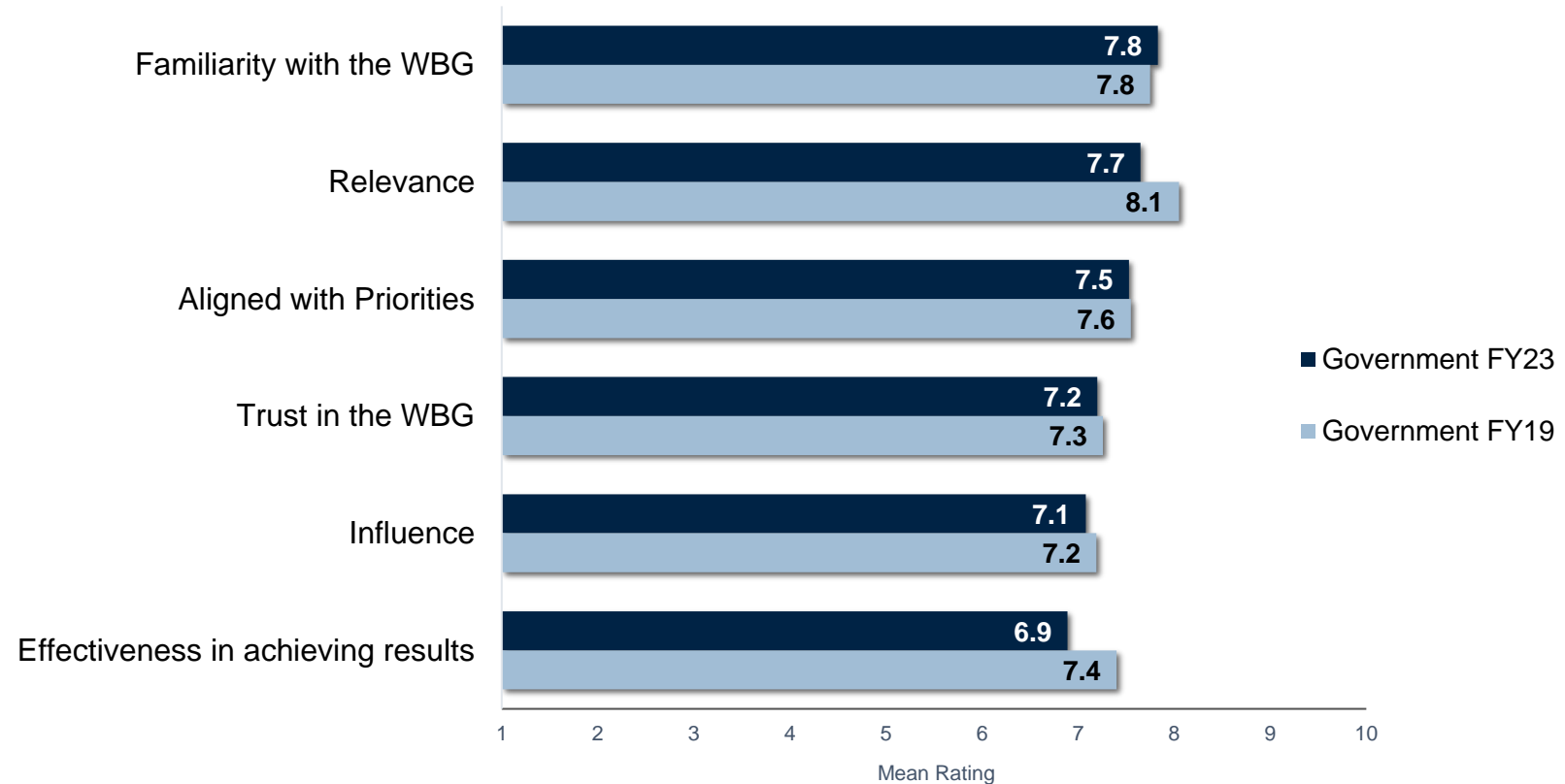
To what extent does the World Bank Group influence the development agenda in Jamaica? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

How effective has the World Bank Group been in achieving development results in Jamaica? Scale: 1-10 (1: Not effective at all– 10: Very effective)

The World Bank Group's work helps end extreme poverty in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

Key Performance Indicators: Government Comparison

The ratings for key performance indicators in Jamaica pertaining to government respondents were statistically similar between the FY23 and FY19 surveys. Of all stakeholder groups, only respondents from the private sector had a significant decline in ratings for trust in the WBG (FY23 mean=7.9, FY19 mean=6.6) and the WBG's effectiveness in achieving results (FY23 mean=7.3, FY19 mean=5.9).



How familiar are you with the work of these organizations in Jamaica? Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar)

The World Bank Group currently plays a relevant role in development in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

The World Bank Group's work is aligned with what I consider the development priorities for Jamaica, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

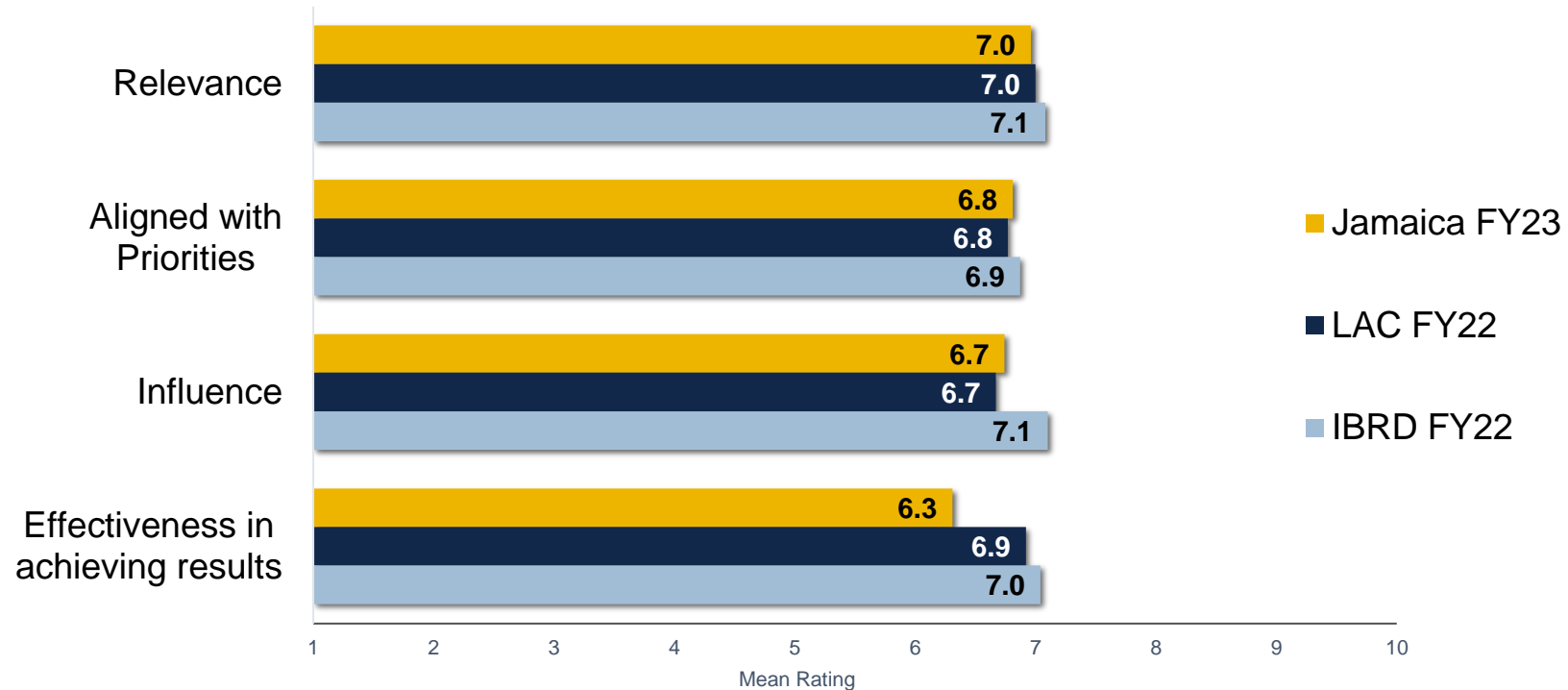
To what extent do you trust each of the following groups to do what is right? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

To what extent does the World Bank Group influence the development agenda in Jamaica? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

How effective has the World Bank Group been in achieving development results in Jamaica? Scale: 1-10 (1: Not effective at all– 10: Very effective)

Key Performance Indicators: Regional Comparison

The mean ratings for relevance, alignment, and influence in Jamaica were statistically similar to those in Latin America and Caribbean (**LAC**) countries surveyed in FY22; however, the effectiveness in achieving development results was significantly lower in Jamaica than in other LAC countries. The mean ratings for relevance and alignment were statistically similar to those in International Bank for Reconstruction and Development (**IBRD**) countries surveyed in FY22; however, effectiveness and influence was significantly lower in Jamaica than in other IBRD countries.



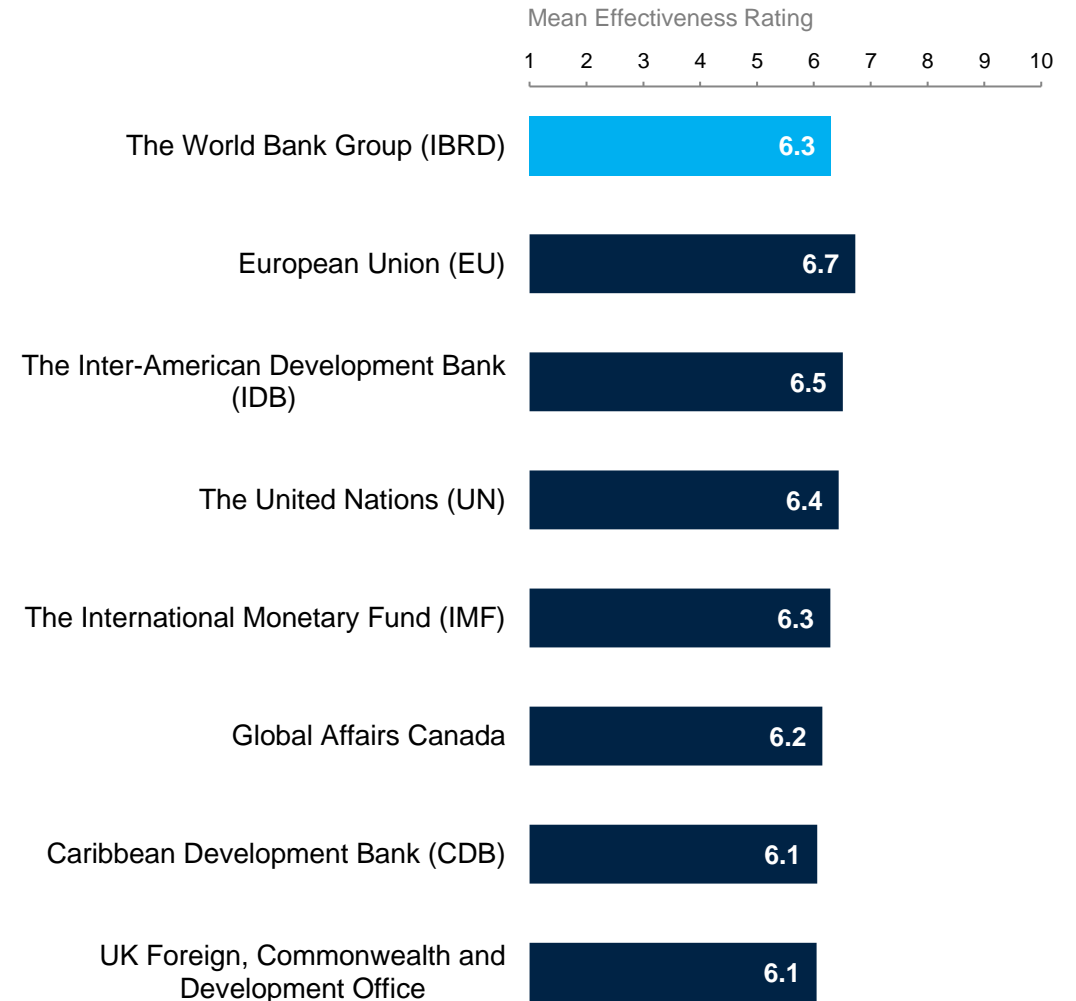
Effectiveness of the World Bank Group

The EU, IDB, and UN were rated higher in their effectiveness at achieving development results than the World Bank Group.

Year comparison: Respondents in this year's Country Survey rated the effectiveness of the IDB and CDB significantly lower than in FY19:

IDB Mean effectiveness: FY23 = **6.5**
FY19 = **7.2**

CDB Mean effectiveness: FY23 = **6.1**
FY19 = **6.6**



How effective has each of these organizations been in achieving development results in Jamaica?
Scale: 1-10 (1: Not effective at all – 10: Very effective)

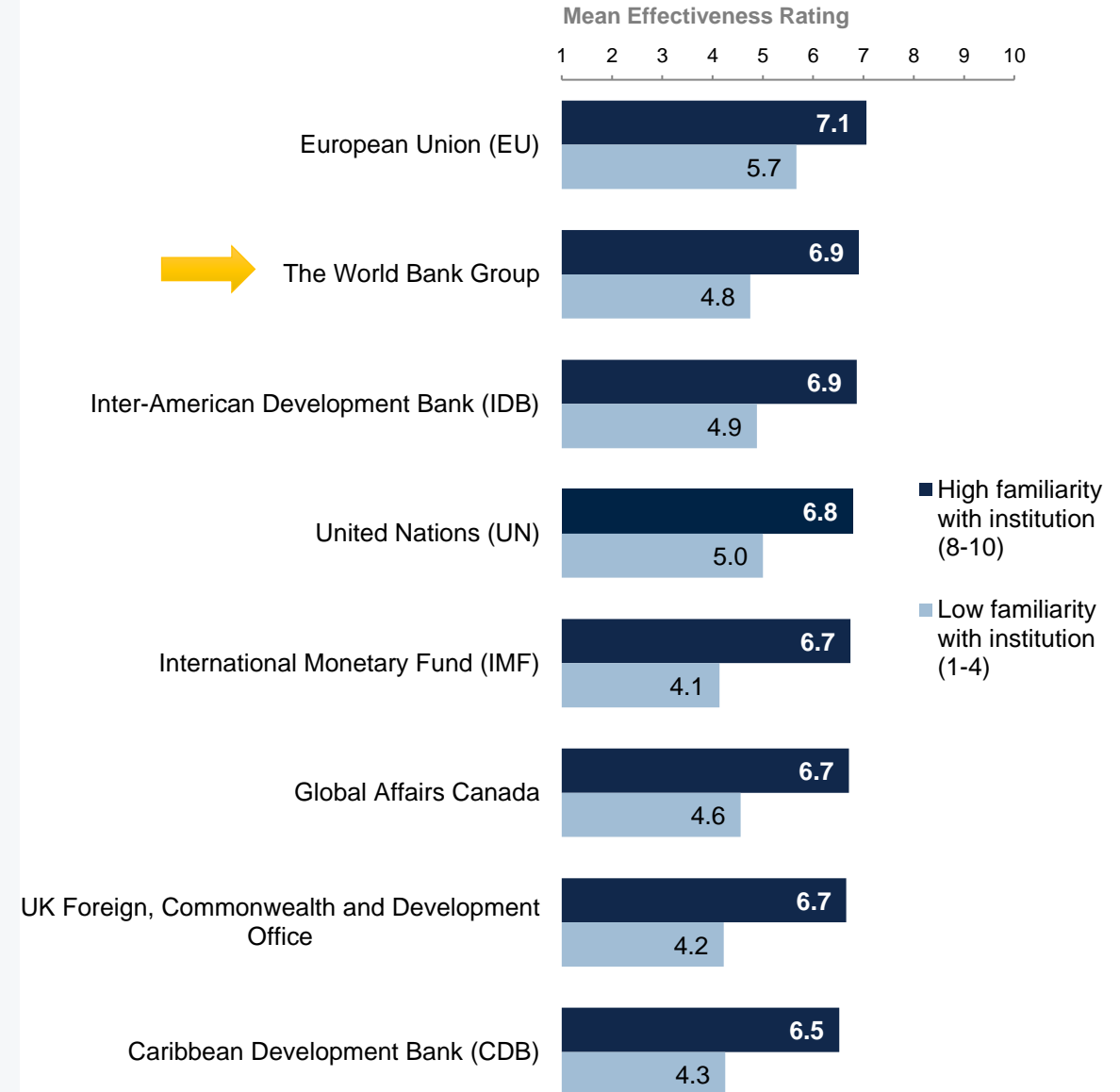
Familiarity Leads to Positive Perceptions of Effectiveness

In comparing the ratings for institutional effectiveness among respondents highly familiar with the institution (ratings of 8-10 on a 10-point scale) and those with little familiarity with the institution (ratings of 1-4 on a 10-point scale), the impact that familiarity has on perceptions of an institution becomes evident.

Those who were highly familiar with an organization's work in Jamaica had significantly more positive perceptions of the institution's effectiveness in achieving development results in Jamaica.



How familiar are you with the work of these organizations in Jamaica?
Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar)
How effective has each of these organizations been in achieving development results in Jamaica? Scale: 1-10 (1: Not effective at all – 10: Very effective)



All significantly different between high and low familiarity

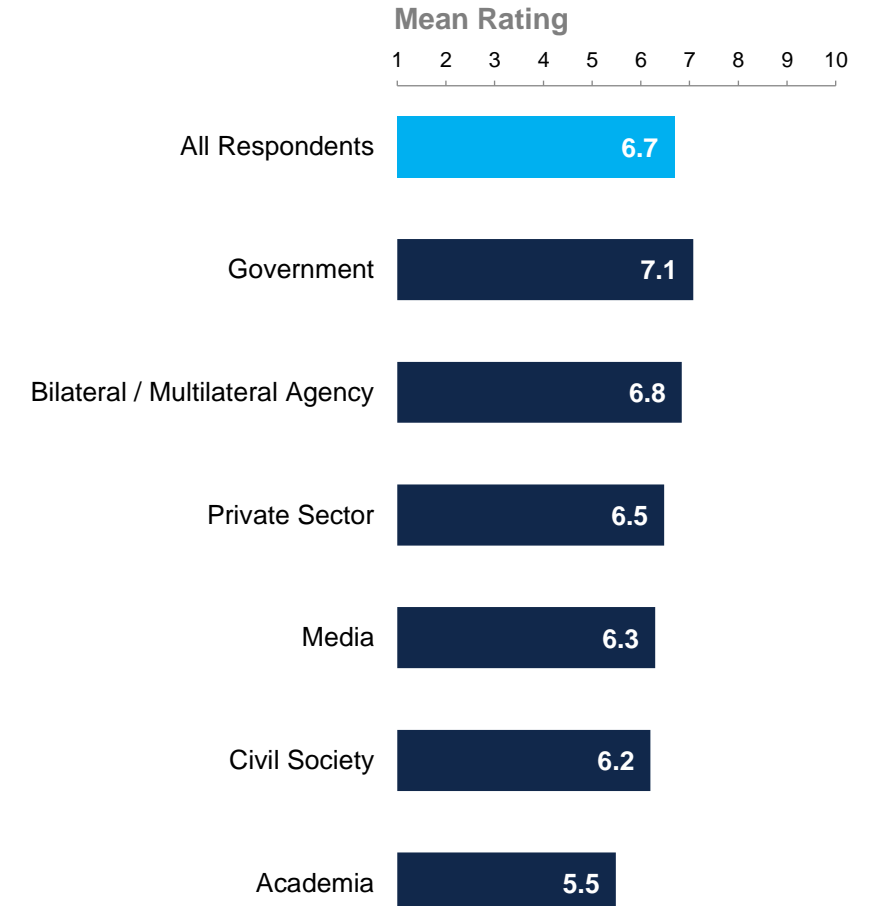
Overall Ratings for Indicator Questions

Respondents from **government** gave the highest mean ratings for the aggregated responses to the eighteen [COS indicator questions](#), whereas respondents from **academia** had significantly lower mean ratings.

Collaboration: Respondents who collaborate with the WBG had significantly higher mean ratings for the aggregated responses to the eighteen indicator questions as compared to respondents who do not collaborate with the WBG:

Collaborate with WBG = **7.4**

Do not collaborate = **6.0**



World Bank Group's Work and Engagement on the Ground

“Partner with civil society groups and academia (triangulate) to build equitable social relationships [and] resilience and [engage in] climate change mitigation to ensure local people benefit, not large corporations.”

Academia Respondent

“[Building] closer partnership[s] with private sector implementing bodies and NGOs may be a more effective means of implementing desired or agreed programs. Implementation through some government institutions has been wanting in terms of timely execution and ability to meet agreed targets.”

Government Respondent



Greatest Value

Financial resources and **technical assistance** continued to be the most valued activities of the WBG in Jamaica.

The perceived value of the WBG's **data and statistics** increased in FY23 (18%), up from 7% in FY19. It was particularly valued by respondents from bilateral/multilateral agencies (35%) and the media (38%).

By contrast, the ratings for **capacity development** decreased from 29% in FY19 to 16% in FY23; however, capacity development was still particularly valued among respondents in the government (32%).

In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Jamaica?

"Work more with the private sector to provide greater grant funding and lower [interest] funding loans to the productive sectors. To access funding [can], at times, ... be onerous. Too much of the funding [is] spent on professionals to administer complex procedures instead of ... on the projects."

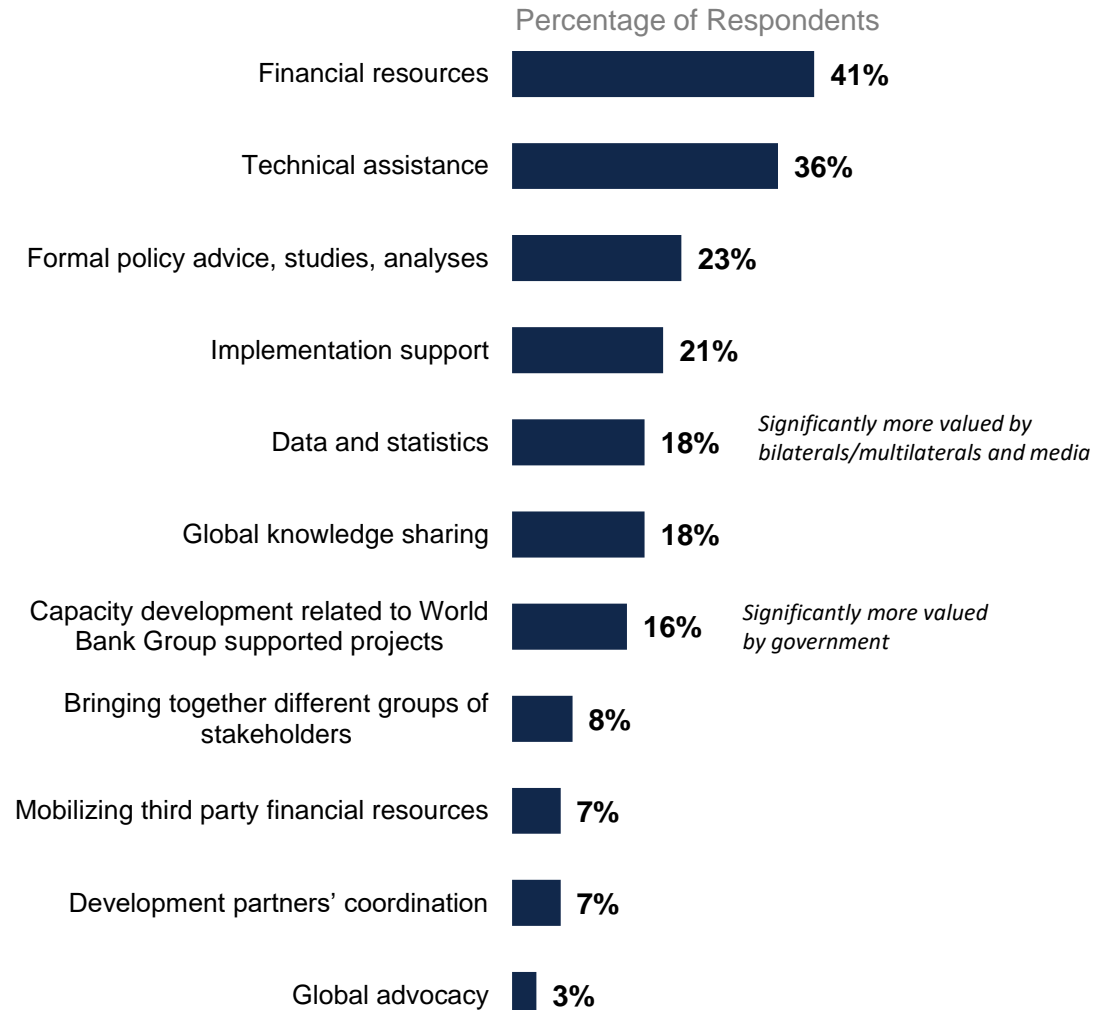
Private Sector Respondent

"Lessen the non-financial conditionalities on financial assistance. Be less dogmatic about imposing conditions and trying to fix problems ... [that] are not relevant to the Jamaican experience."

Academia Respondent

"Increase development financing for investment projects and social inclusion measures."

Government Respondent



The WBG as a Development Partner

The WBG is seen as an **open, long-term partner** in Jamaica.

Although perceptions of the WBG as a development partner were lower this year compared to FY19, only the difference in perceptions of the WBG as a long-term partner reached statistical significance.

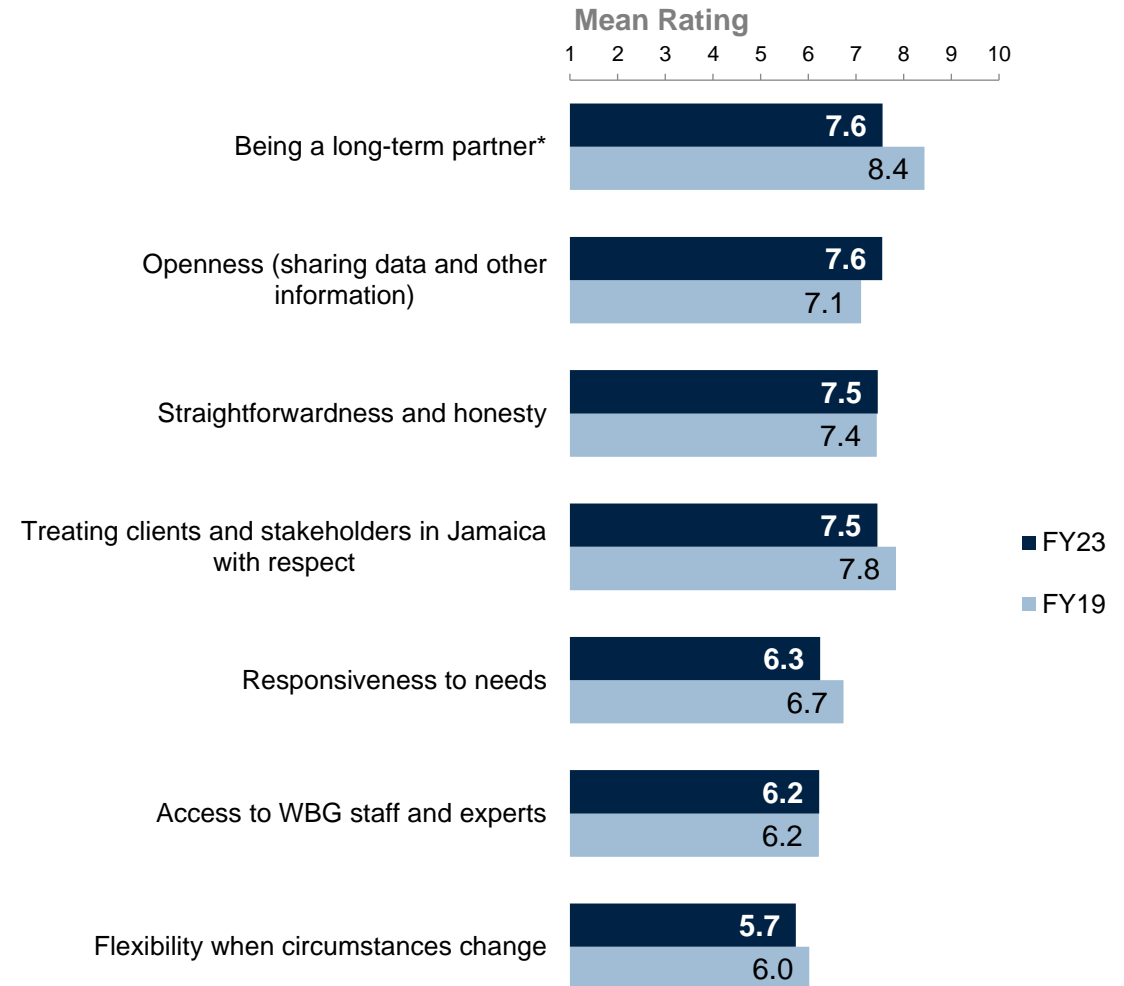
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Jamaica?

"1. Become a visible partner, through traditional and digital media channels. 2. Quantify the many successful projects completed and highlight them for publication."

Media Respondent

"[The] World Bank should continue to sustain its mandate and programs implemented in Jamaica as they have been well received."

Government Respondent



*Significantly different between years

The WBG should Collaborate More with the Private Sector and Civil Society according to Respondents

A majority of respondents indicated that the WBG should collaborate more with the **private sector** and **civil society**, which is consistent with the FY19 findings. Respondents also wanted more collaboration with **academia** and the **national government**.

In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Jamaica?

"Increase local stakeholder engagement, especially with the private sector. Work with academia could help the group fine tune priority areas of support. ...The media could also benefit from workshops to build capacity and aid specialist reporters, or reporters in general, to ... improve how they share with the public the World Bank's work."

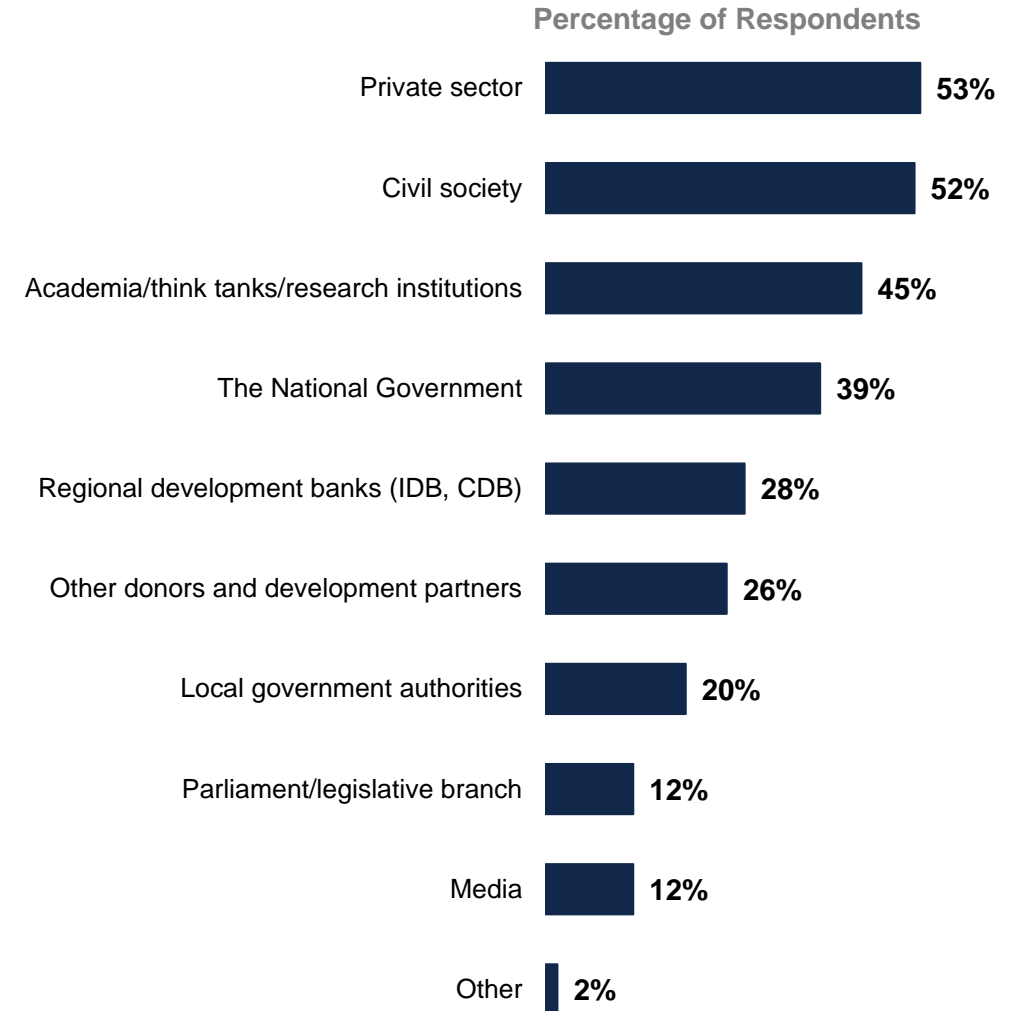
Media Respondent

"More engagement with grassroots civic organizations --both urban and rural -- [is necessary] to ... [obtain] their insights as to (i) what are the most urgent and pressing needs, (ii) what they believe to be viable solutions to obstacles/challenges for development."

Government Respondent

"Increase engagement with civil society, academia, [the] media and local governments to improve responsiveness of support and widen public support."

Media Respondent



WBG as a Development Partner in terms of Collaboration with Stakeholders

The WBG received the highest mean ratings for its collaboration with the **national government** of Jamaica.

For those institutions that could be compared, respondents gave statistically similar ratings for the WBG's collaborations as compared to FY19.

Respondents from academia were the most critical of the WBG's collaboration with various stakeholder groups (mean rating across all groups = 4.9).

In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Jamaica?

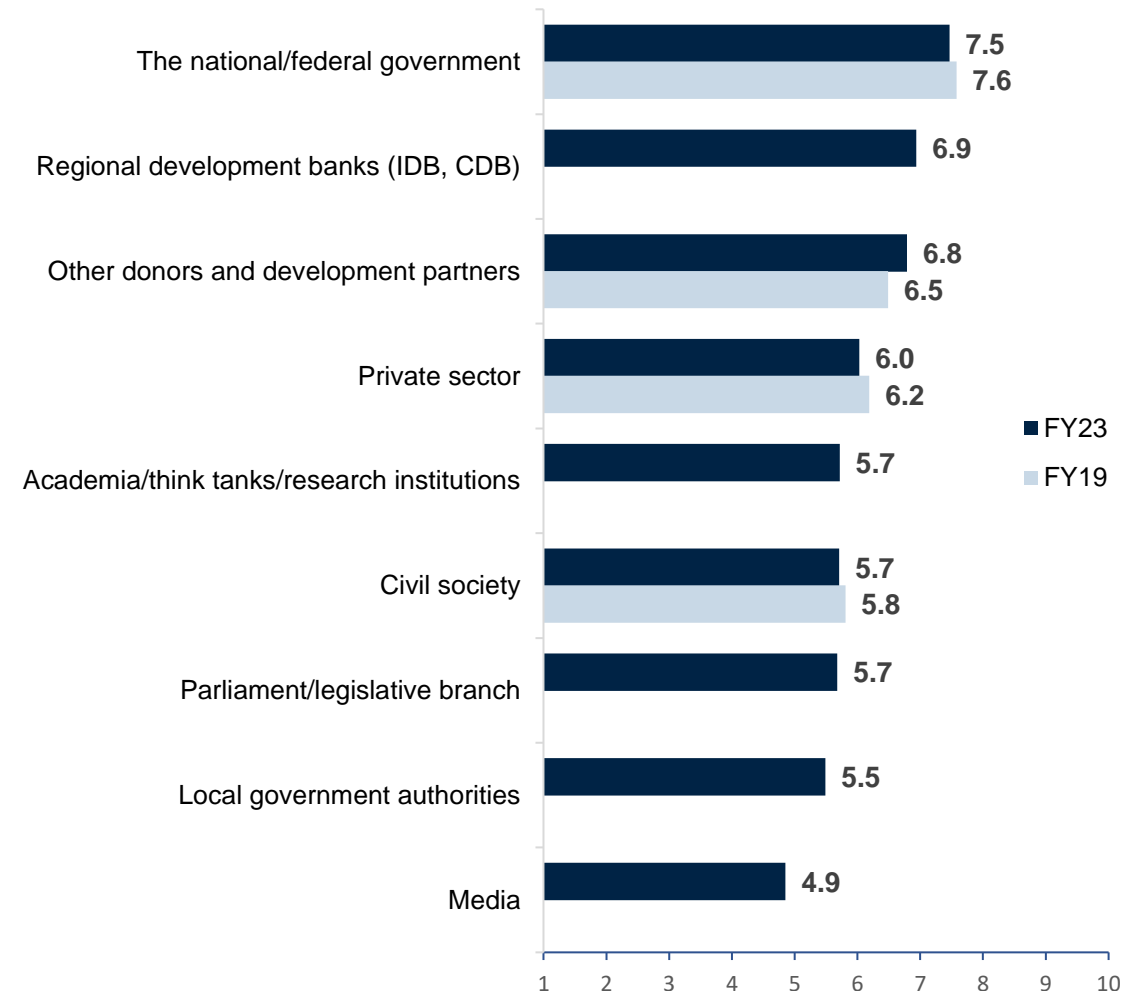
"1. Increase and strengthen partnerships with community-based organizations.

2. Create more opportunities for exposure of the work of the WBG through traditional and new media."

Parliament Respondent

"I think the World Bank as a development partner can more deliberately and closely work with CSOs so that we are more aware of their outputs, as well as have greater opportunities to partner with them on projects."

Civil Society Respondent



WBG's Financial Instruments

Respondents had the highest levels of agreement regarding the insistence of the WBG on **accountability** through its lending. They also agreed that working with the WBG increases Jamaica's **institutional capacity**, and that the WBG effectively **monitors and evaluates** its projects.

Respondents had the lowest levels of agreement that the WBG's financial instruments **meet Jamaica's needs**.

Respondents' ratings regarding the WBG's financial instruments in Jamaica were significantly higher compared to LAC countries surveyed in FY22; however, ratings for the WBG's financial instruments meeting the needs of the country were significantly lower than in other LAC countries.

In this year's survey, compared to respondents from other stakeholder groups, respondents from bilateral/multilateral agencies and academia had significantly lower levels of agreement that the WBG insists on accountability (means=6.9 and 7.2, respectively). Respondents from academia and the media also had significantly lower levels of agreement that the WBG's financial instruments meet Jamaica's needs (means=5.0 and 4.7, respectively).

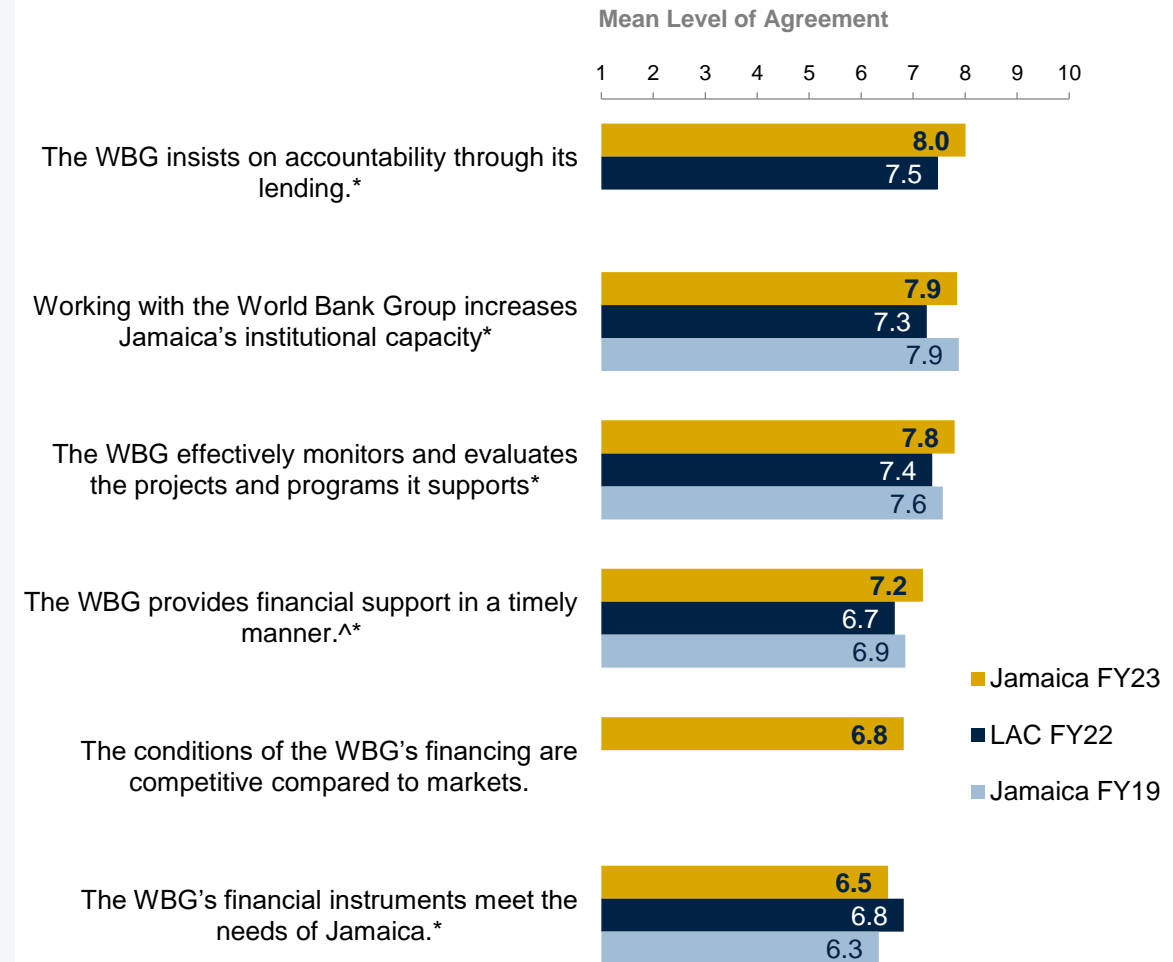


To what extent do you agree/disagree with the following statements?

Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

^In FY22 and in FY19, the option was "The World Bank Group disburses funds promptly"

LAC FY22 included: Bolivia, Colombia, Ecuador, Guatemala, Panama, and Peru



*Significantly different between Jamaica FY23 and LAC FY22

World Bank Group's Knowledge Work and Activities

“Providing free and timely access to up-to-date data and statistics [is valuable]. Sharing more of your knowledge on the issues that are affecting Jamaica [is also important].”

Media Respondent

“Really pay attention to the issues, don't make assumptions, ensure that local consultants are involved – and not persons who do not know the Caribbean or Jamaican context.”

Private Sector Respondent



WBG's Knowledge Work

The majority of respondents reported that they had not used the WBG's knowledge work.

Although it did not reach statistical significance, it should be noted that **57% of government respondents reported using WBG's knowledge work**, whereas most respondents from other stakeholder groups reported not using it: for example, bilateral/multilateral agencies (59%); civil society (62%); the private sector (47%); academia (67%); and the media (63%).

Respondents who had used the WBG's knowledge work in the past had significantly higher levels of agreement that they anticipate using WBG knowledge work in the future (mean=8.7) than respondents who had not used it in the past (mean=7.0).

In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Jamaica?

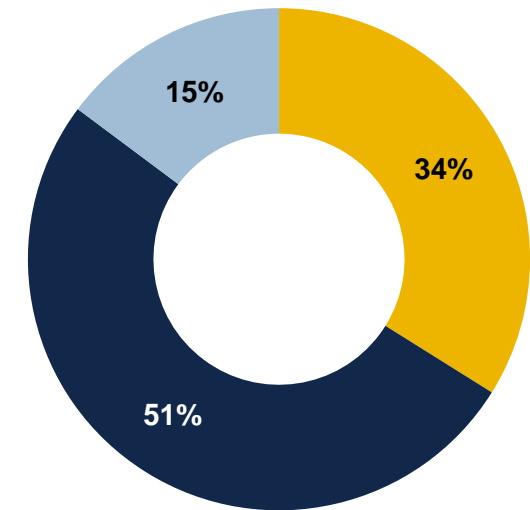
"WBG could do a better job [regarding the] ... dissemination ... of results of various studies/findings."

Academia Respondent

"Generate more knowledge ... [about] the products and make them more accessible, including ramping up climate financing."

Bilateral/Multilateral Agency Respondent

Use of the WBG's Advisory Services and Analytics



■ Yes ■ No ■ Not sure

WBG's Knowledge Work (continued)

Respondents had the highest levels of agreement about their plans to use WBG knowledge work **in the future** – and that the WBG brings **global expertise**.

Respondents gave the lowest ratings for the **significance of the contribution** of the WBG's knowledge work to development results, and for the WBG's knowledge being **adequately disseminated** (however, the latter has significantly improved since FY19).

Of note, across most aspects of the WBG's knowledge work, respondents from government and bilateral/multilateral agencies tended to have the most positive perceptions. However, respondents from academia and the media tended to have the least positive perceptions. Respondents across all stakeholder groups had similar ratings for their anticipated use of the WBG's knowledge work in the future.

Respondents' ratings that the WBG's knowledge work brings global expertise, is adequately disseminated, and is timely were significantly higher compared to LAC countries surveyed in FY22; however, ratings for the significance of the contribution that the WBG's knowledge work makes to development results had significantly lower ratings than in other LAC countries.

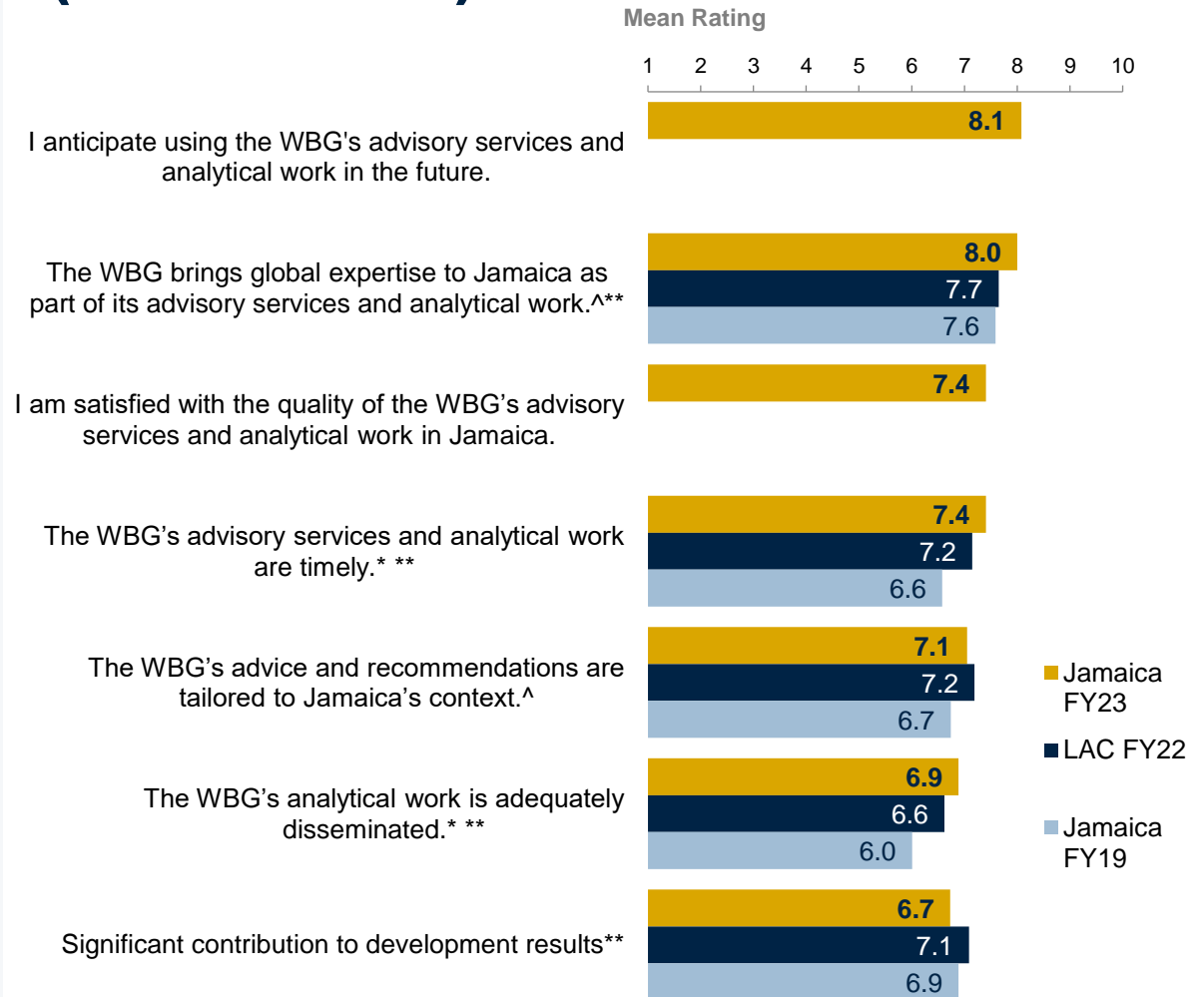
To what extent do you agree/disagree with the following statements? Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in Jamaica?

Scale: 1-10 (1: Not significant at all– 10: Very significant)

^In FY19, this option was "Are adaptable to Jamaica's specific development challenges and country circumstances"

LAC FY22 included: Bolivia, Colombia, Ecuador, Guatemala, Panama, and Peru.



*Significantly different between Jamaica FY23 and Jamaica FY19

**Significantly different between Jamaica FY23 and LAC FY22

The Future Role of the World Bank Group in Jamaica

“The World Bank should focus more resources on independent initiatives taken by people at the community/local level that create new and meaningful economic opportunities to improve their human welfare. Enable more initiatives in sync with their traditions and culture.

...So, for [increased] World Bank effectiveness, use more local human resources.”

Civil Society Respondent

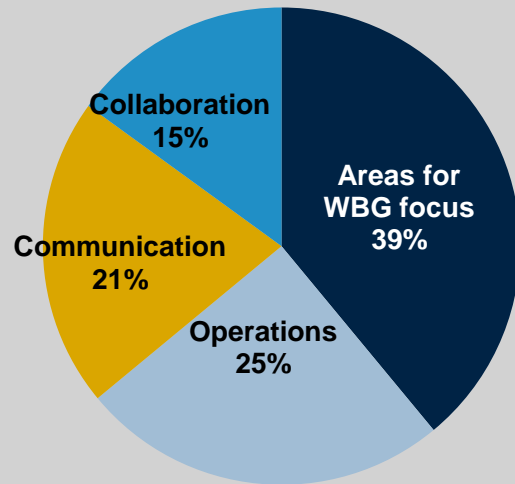
“Liaise with existing government partners to ensure no duplication and maximum leveraging of funds.”

Bilateral/Multilateral Agency Respondent



What the World Bank Group Could Do to Increase its Effectiveness in Jamaica

Categories of responses to the qualitative question about what the WBG could do to help increase its effectiveness in Jamaica



Focus areas: Respondents highlighted some of the key areas that they consider important for the WBG. These included **human capital**—particularly support for education; **public sector governance** – including capacity development, public resource management, and anti-corruption; support for **capital projects** and **infrastructure** building and maintenance; **sustainable development**, environmental protection and coping with the effects of climate change; **private sector development**, and more **inclusive development**.

“By Increasing human capacity development projects and being more transparent in its work in Jamaica.”

Private Sector Respondent

“Provide enhance[d] technical IT assistance to [micro, small and medium enterprise] MSME growth and development through access to affordable and fit for purpose financing. Facilitate [the] increase[d] adoption and use of technology products and services for MSMEs. Hold the national government more accountable [for] its poor spend[ing] on infrastructure, specifically on road maintenance.”

Government Respondent

“Investing in education and creating human capital – particularly addressing at-risk youth, digitalization, modernizing agriculture, and increasing private sector engagement – are some of the opportunities that stood out; [also], ... fostering a creative economy and urban rejuvenation.”

Bilateral/Multilateral Agency Respondent

“More targeted development projects for rural Jamaica and deprived urban areas of the capital and other cities and towns. More help to transform the country’s education system.”

Media Respondent

“Providing more climate-resilient grant funding to ... vulnerable and at-risk communities to reduce the impact of climate change.”

Government Respondent

What the World Bank Group Could Do to Increase its Effectiveness in Jamaica (continued)

Operations: Respondents stressed the importance of transparency and accountability in WBG-funded projects, pointing out the need for closer monitoring and evaluation of the results. Respondents also emphasized that the Bank needs to be more strategic, ensuring implementation capacity, as well as realistic indicators of effectiveness. Some felt that the Bank needed to reinforce its partnerships and engage more with Jamaica.

“More direct oversight mechanisms [are needed] to ensure credibility and accountability of government support provided to vulnerable groups.”

Civil Society Respondent

“Within the context of monitoring and evaluation, the WBG could focus more on evaluation of some of its projects to ensure they are achieving [the] desired goal/impact.”

Civil Society Respondent

“Have more targeted interventions at the tertiary level through internships, learn and earn projects in underserved communities, for example, [helping] the disabled or farming communities.”

Government Respondent

“Focus on ensuring that recipients have very clear monitoring and evaluation frameworks with realistic indicators. [Also], ensure ... that disbursements are only done when it is clear that the institution has the capacity to absorb and utilize resources effectively. Ensure that recipients have a track record of transparency and accountability with the requisite governance structure. [This means that] where targets are not being met, no further funding is made available. Support capacity building to implementing partners to ensure that they have capacity to manage projects properly.”

Academia Respondent

“I think the Bank’s support has declined over the years. Therefore, it could do a needs analysis and try to provide more support in the areas [in which] the country is struggling.”

Government Respondent

Collaboration and Communications: Responses mainly focused on the need for more effective collaboration with various stakeholder groups and effective communications with the media and the public. These responses are, for the most part, covered in the respective sections of this report.

Communications and Outreach

“[The WBG should] more effectively communicate its evaluations and findings through dissemination groups and public engagements.”

Academia Respondent

“The WBG could more effectively share its information with the wider society, including civil society groups, academia, [the] private sector, trades unions and the like. [It should share] ... its analyses of the development issues ... we confront.”

Parliament Respondent



General Information Sources

Respondents reported using a variety of sources to obtain information about socioeconomic development issues in Jamaica, but a majority relied on **newspapers** and **research papers**.

Respondents from all stakeholder groups indicated that they obtain most of their information from newspapers or research papers. However, respondents from academia indicated that they were significantly less likely to utilize TV. They were significantly more likely to utilize podcasts than respondents from other stakeholder groups.

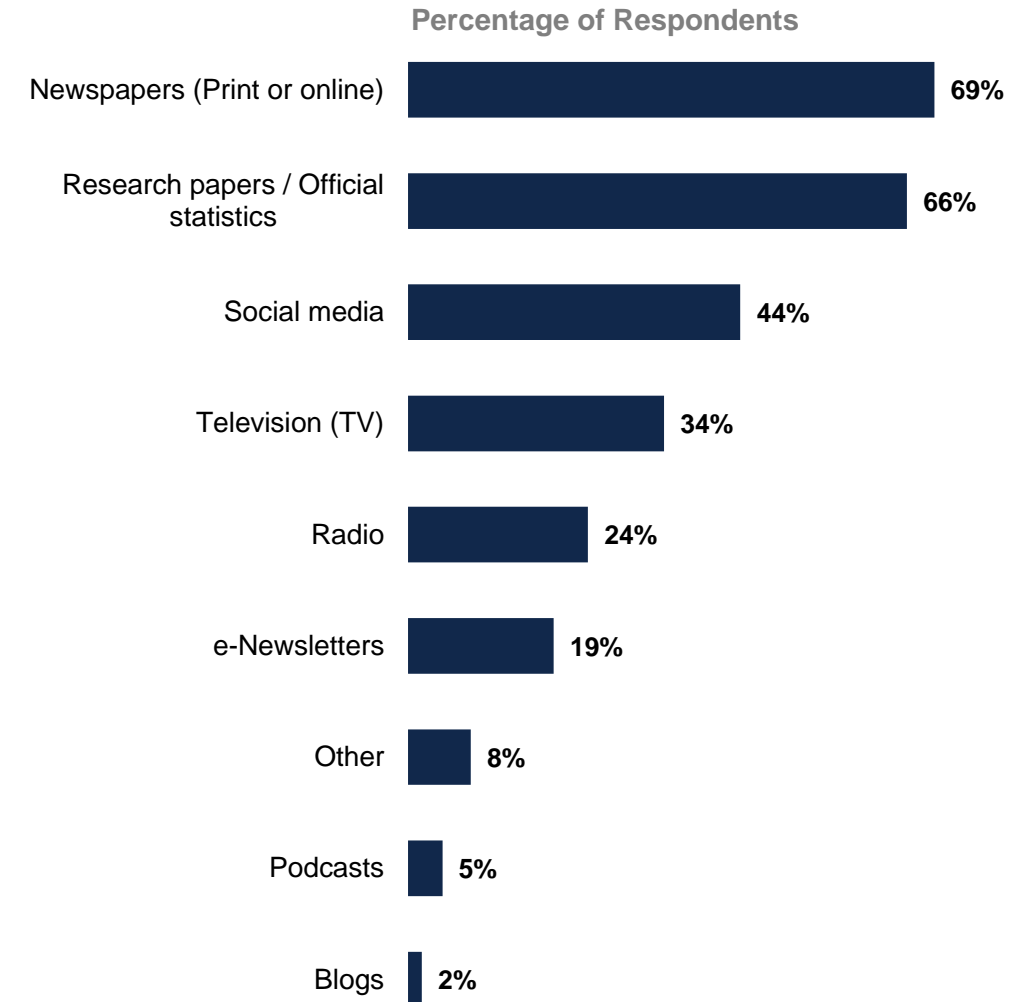
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Jamaica?

“Ensuring increased promotion of its work through projects and programmes that are supported in Jamaica via media and formats that are readily accessible by the Jamaican populace.”

Government Respondent

“Build more awareness with less visible stakeholders about the impact of the WBG work and services.”

Private Sector Respondent



Preferred WBG Information Sources

A majority of respondents reported that they preferred to obtain information about the WBG and its work through **publications**.

Respondents from bilateral/multilateral agencies preferred direct contact equally to publications (62% for both). Respondents from academia preferred events/conferences (71%) more than publications (57%).

Although their top preference was publications, respondents from civil society and the private sector also liked e-Newsletters (46% and 50%, respectively) and media respondents also liked interviews and press conferences (60%).

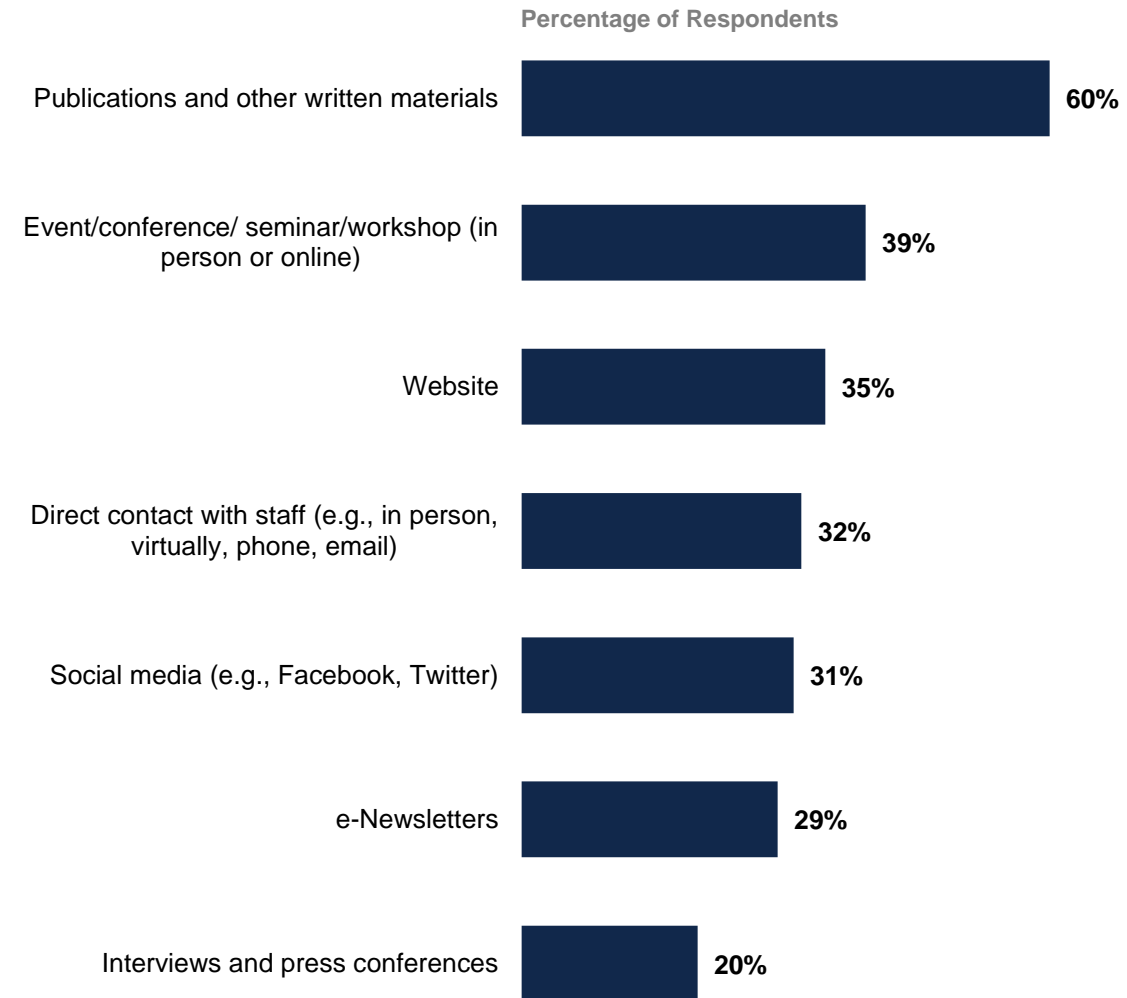
In your opinion, what is the most important thing the WBG could do to help increase its effectiveness in Jamaica?

"Frequent and more robust media interactions, to include, but not [be] restricted to, updates on ongoing and upcoming projects, their efficacy and impact on [the] macro and micro levels. Updates on key focus areas of [the] WBG – how will Jamaica and the region benefit from them."

Media Respondent

"...Not terribly familiar with specific projects aside from a few that we have been involved in. Could continue to increase visibility and profile of major donors and partners, and also ensure that donor advocacy and interventions are coordinated and supportive of World Bank work."

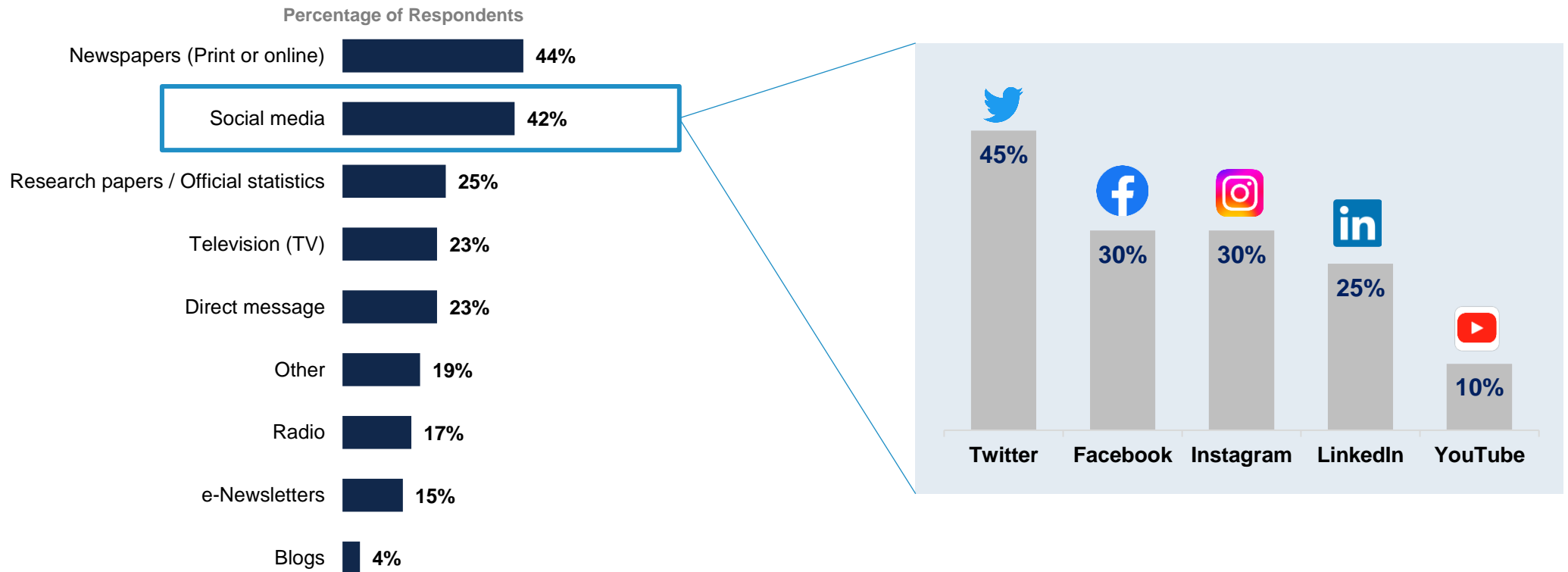
Bilateral/Multilateral Agency Respondent



Recent Interactions with the WBG

44% of respondents recalled hearing or seeing something about the WBG in the last 30 days.

Respondents reported seeing that information most often in **newspapers** and on **social media**. Among those who selected “Social media”, respondents most commonly reported seeing something on **Twitter**.

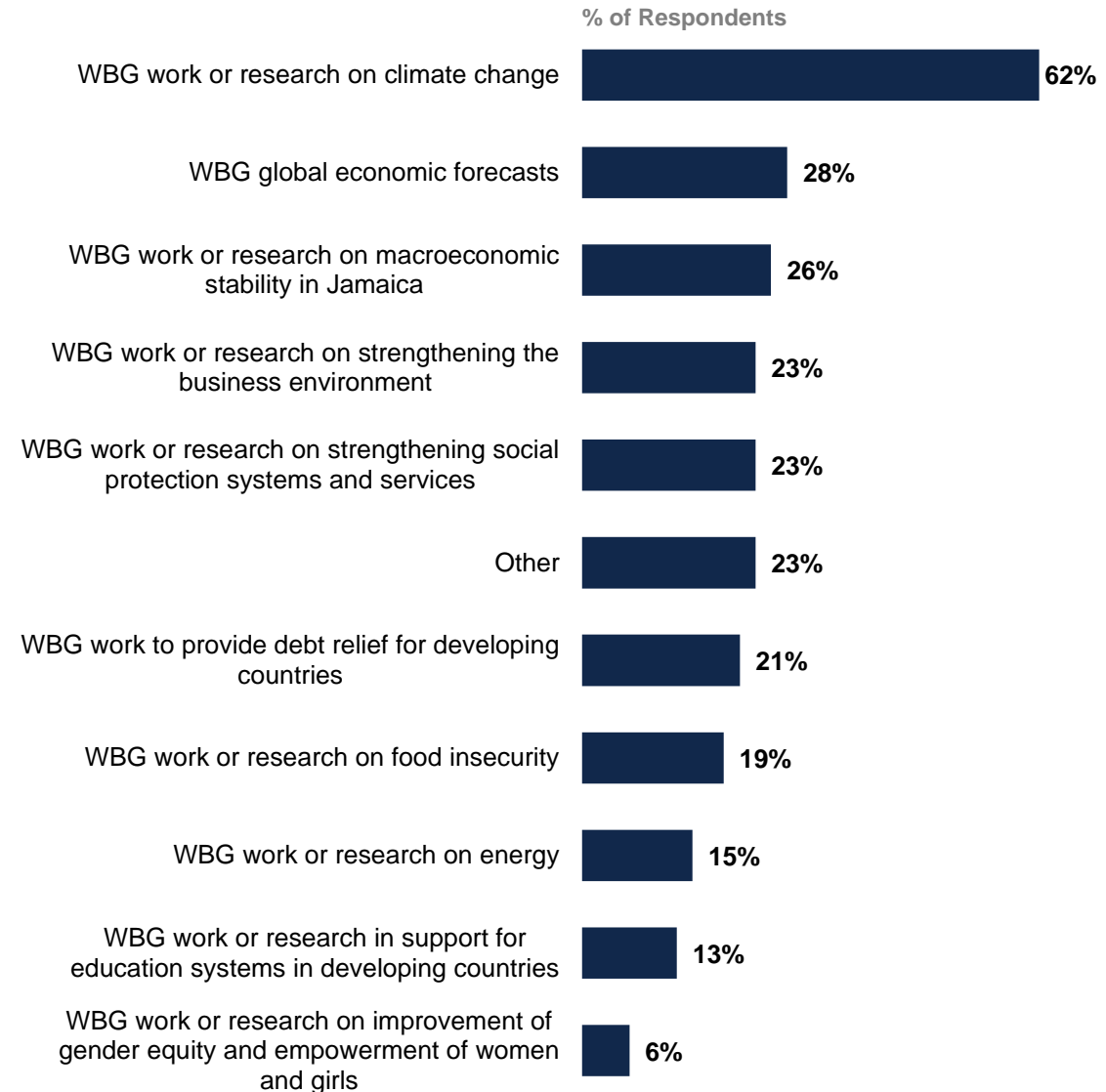


Topic Recall in the Last 30 Days

Those who collaborate with the WBG were significantly more likely to recall seeing/hearing about it in the last 30 days (78%) than those who do not collaborate with the WBG (25%).

In terms of stakeholder groups, respondents from civil society and the private sector were the least likely to recall messages related to the WBG (15% and 11%, respectively). However, respondents from government and bilateral/multilateral agencies were the most likely to recall seeing/hearing about the WBG (72% and 57%, respectively).

In terms of the topics, **the WBG's work or research on climate change** was by far the topic respondents most frequently recalled seeing or hearing about in relation to the WBG in the last 30 days.



Message Recall and Perceptions of WBG Work

Those respondents who recalled seeing or hearing something about the WBG in the last 30 days **gave higher ratings for key messages** regarding the WBG's work – significantly so for messages related to the WBG's work on jobs, climate, energy, and social protection.

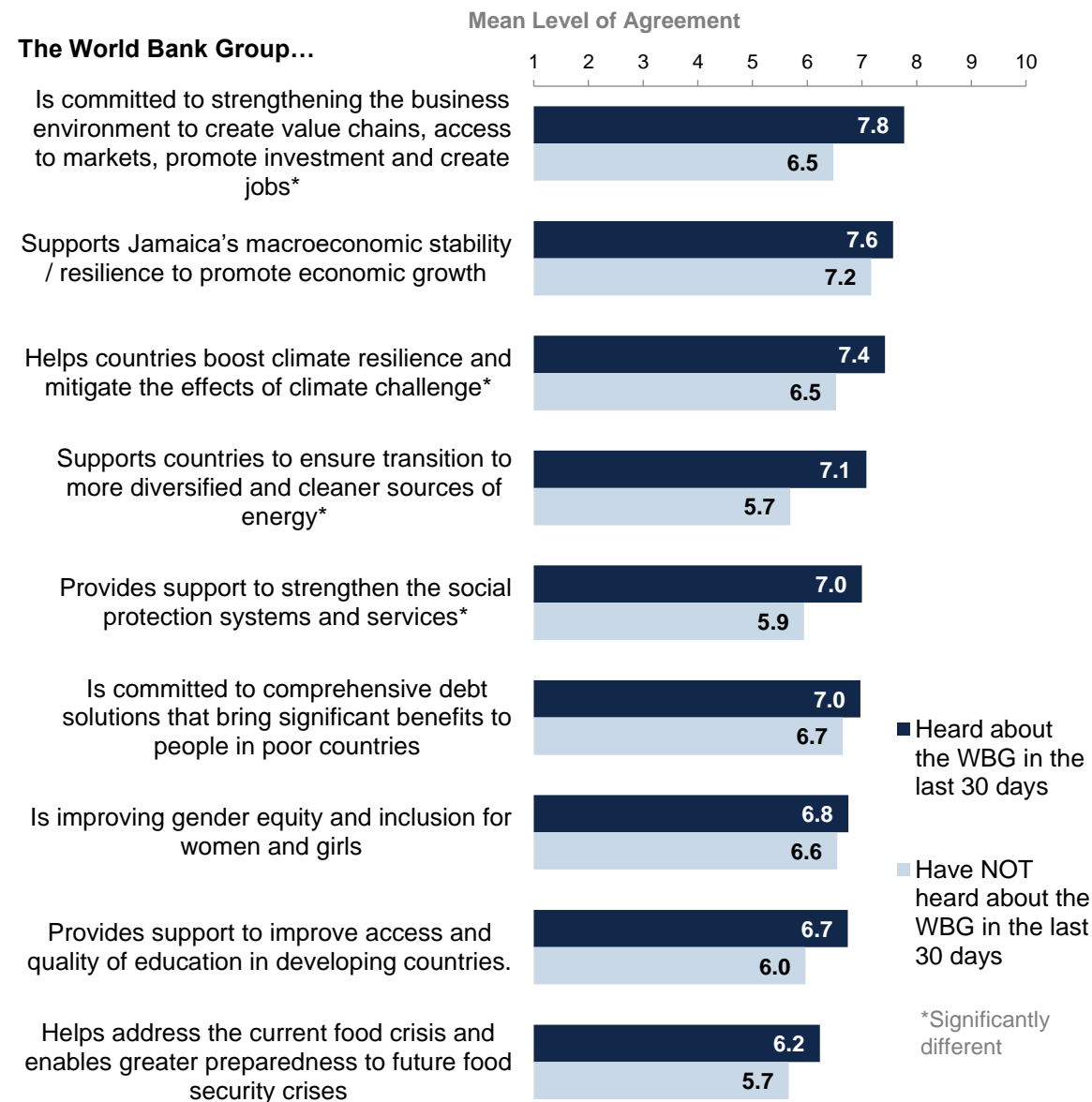
Respondents who recalled seeing or hearing something about the WBG in the last 30 days also reported significantly **higher levels of familiarity** (mean=8.2) and **trust** in the WBG (mean=7.3) compared to those who reported not hearing or seeing anything about the WBG recently (means=6.6 and 6.3, respectively).

In addition, the respondents who recalled seeing or hearing something about the WBG gave significantly higher ratings for the WBG's **effectiveness** (mean=6.9), **relevance** (mean=7.9), and **alignment** (mean=7.3) as compared to those who reported not hearing or seeing anything about the WBG recently (means=6.1, 6.6, and 6.5, respectively).

These findings suggest that respondents who are more frequently exposed to information about the WBG, or who actively engage with WBG staff and knowledge work (read research papers, etc.) are also more likely to hold more positive views about the WBG's work.



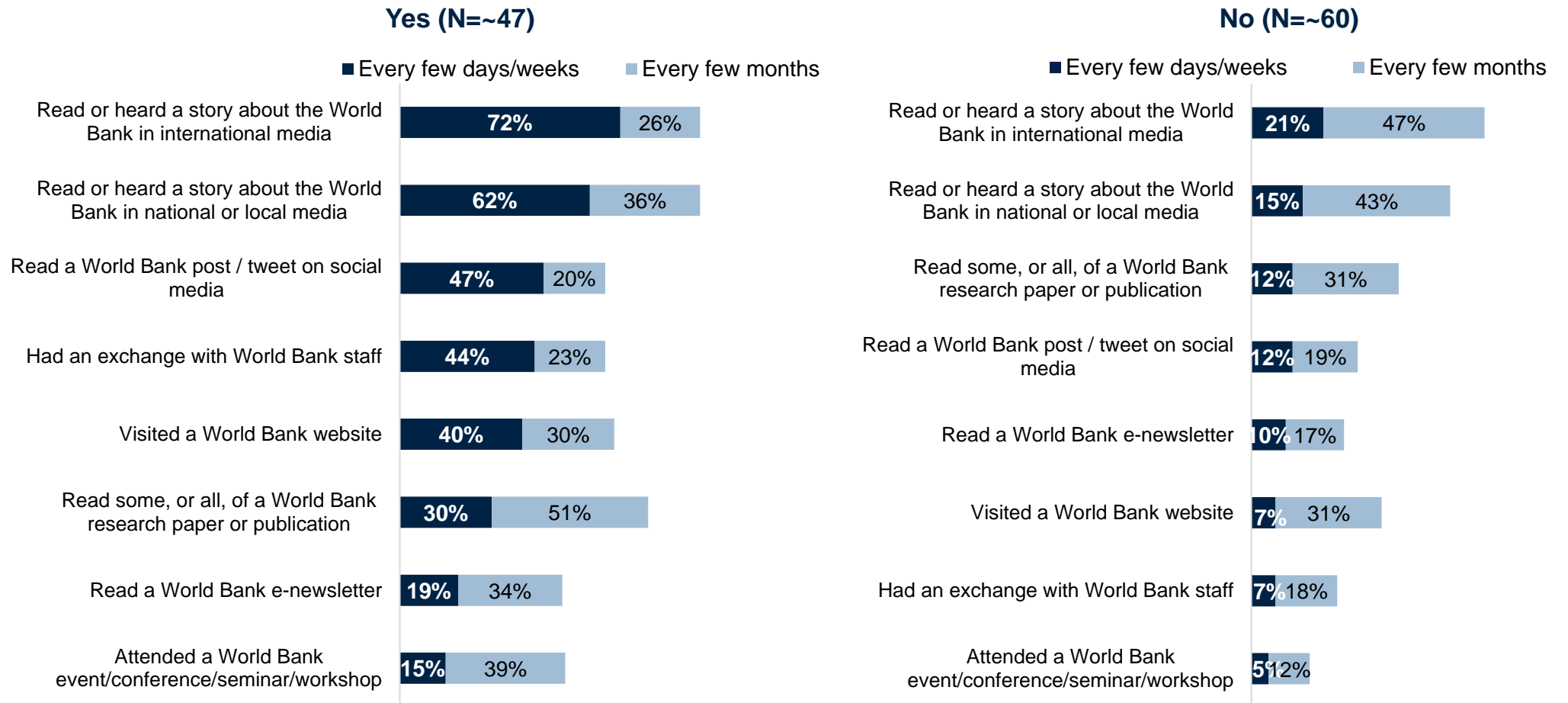
Do you recall seeing or hearing anything about the WBG in the last 30 days?
To what extent do you agree with the following statements: Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)



Frequency of Engagement → Message Recall

Respondents who recalled hearing something about the WBG in the last 30 days tended to have more frequent interactions with the institution **across all channels** – significantly so for **personal interactions with WBG staff**, visiting the **WBG website**, and engaging with the WBG **social media**, as well as encountering information about the WBG in **international and local media**.

Do you recall seeing or hearing anything about the WBG in the last 30 days?

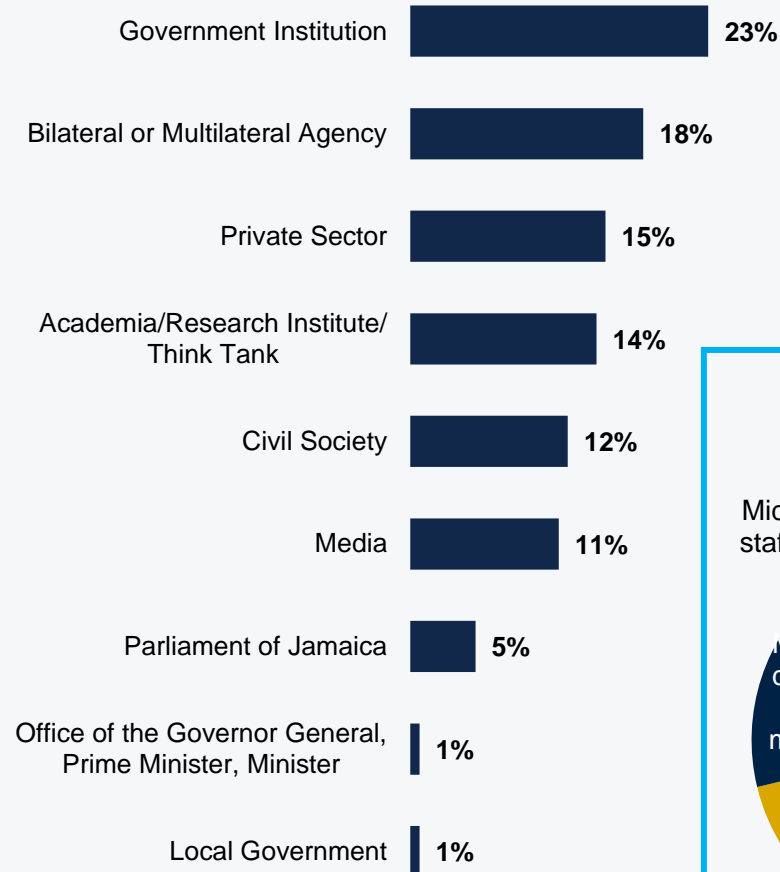


Sample Demographics

Respondent Profile: Affiliation, Specialization, Status

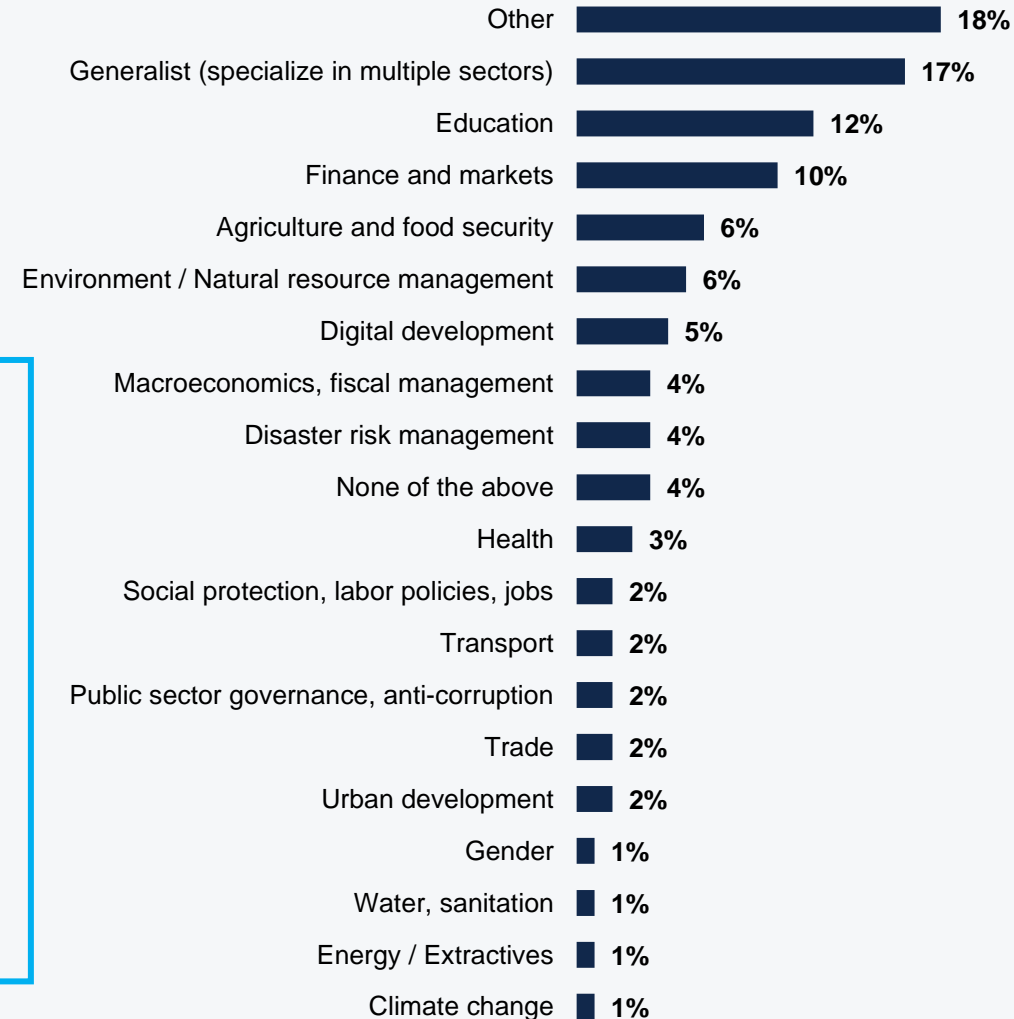
Current Affiliation

Percentage of Respondents

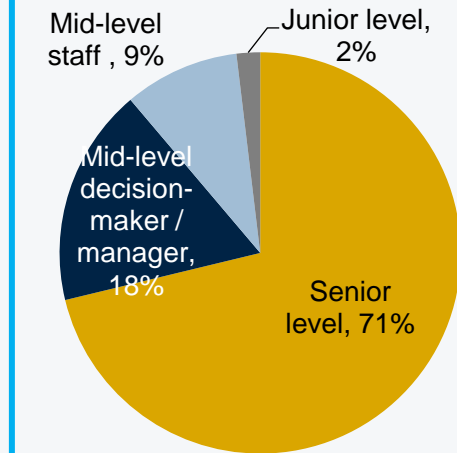


Specialization

Percentage of Respondents



Self-identified Status



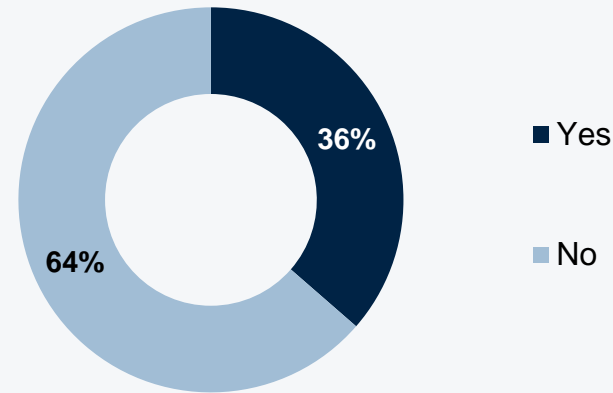
Which of the following best describes your current affiliation? (Select only 1 response) (N=140)

Please identify the primary specialization of your work. (Select only 1 response) (N=109)

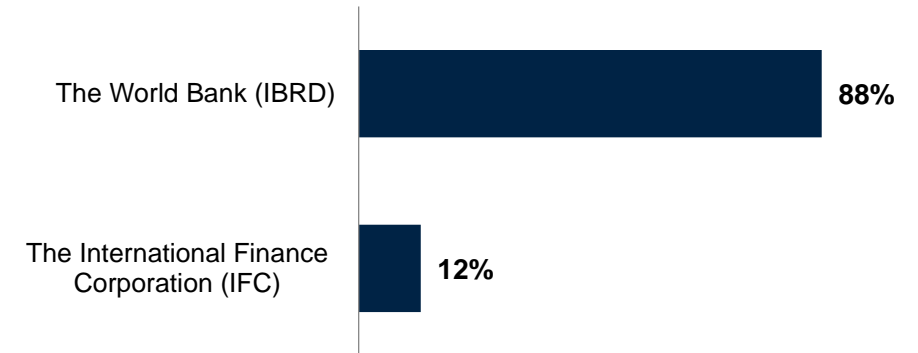
Within your organization, would you describe yourself as (N=108)

Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



Collaboration Institution



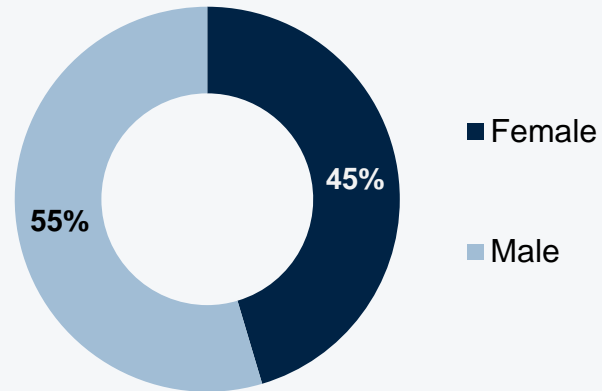
Please note that in the FY19 COS, 55% of respondents indicated that they collaborate with the WBG. Because collaboration has a significant influence on the perceptions of the WBG, it is possible that some of the past year comparison analyses are influenced by this change in the respondent profiles.



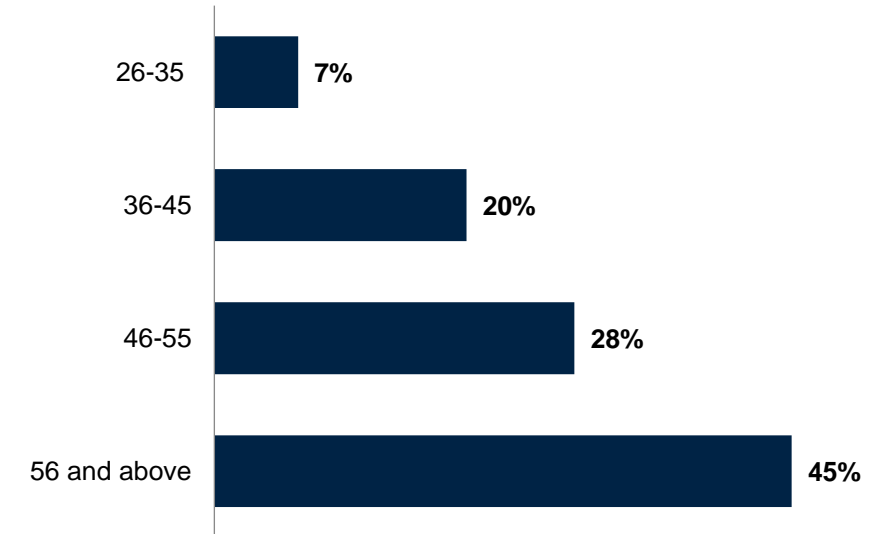
Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=140)
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Jamaica? (Select only 1 response) (N=51)

Respondent Profile: Demographics

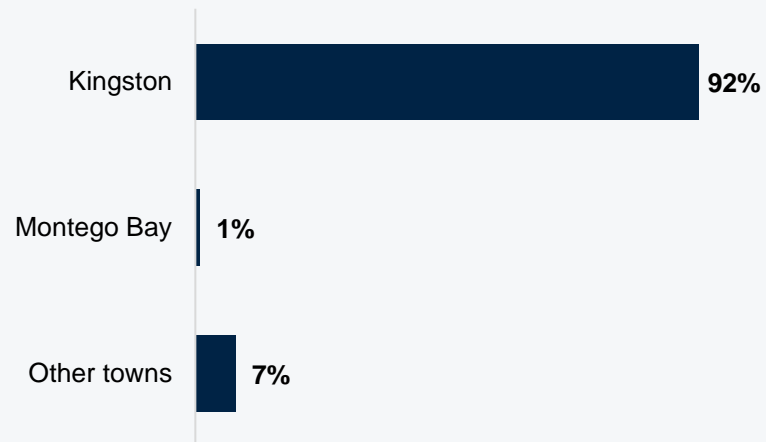
Gender



Age



Location



What's your gender? (N=108)

What's your age? (N=107)

Which best represents your geographic location? (N=108)



Methodology

Methodology

From May 2023 to June 2023, 477 stakeholders of the WBG in Jamaica were invited to provide their opinions about the WBG's work in the country by participating in a Country Opinion Survey. Participants were drawn from the Office of the Governor General, Prime Minister, Minister; Parliament of Jamaica, government institutions; local governments; bilateral / multilateral agencies; the private sector; civil society organizations; academia, research institutes, think tanks, and the media.

A total of 140 stakeholders participated in the survey (29% response rate). Respondents completed the questionnaire via an online platform.

Every country that engages in the Country Opinion Survey (COS) must include specific indicator questions; several of them are aggregated for the World Bank Group's annual Corporate Scorecard (please refer to the [Indicator questions](#) section of this report).

Year comparisons

The results of this year's Country Survey were compared to those of the Country Survey conducted in FY19 (response rate was 26%, N=114).

Comparing responses across Country Surveys reflects changes in attitudes over time, as well as changes in respondent samples and the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options are analyzed.

The distribution of the stakeholder groups in the final samples in the FY19 and FY23 country surveys are listed in the table on the right.

This year's survey saw an increased outreach to and/or response from bilateral/multilateral agencies, academia, and the media. However, there was a decrease in outreach to and/or response from the government institutions. These differences in the stakeholder composition between the two years should be taken into consideration when interpreting the results of the past-year comparison analyses.

| Percentage of Respondents | FY 2019 | FY 2023 |
|--|---------|---------|
| High-Level Government Offices: Office of the Governor General, Prime Minister, Minister, Parliament of Jamaica | 7% | 6% |
| Government institutions: Employee of a Ministry, Department, Agency, Executive Agency, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise | 53% | 23% |
| Local government | 0% | 1% |
| Bilateral/multilateral agency: Embassy, Development Organization, Development Bank, UN Agency | 5% | 18% |
| Civil Society Organization: NGOs, Community-Based Organization, Private Foundation, Professional /Trade Association, Faith-Based Group, Youth Group | 8% | 12% |
| Private Sector: Private Company, Financial Sector Organization, Private Bank, Micro, Small and Medium-sized Enterprise | 12% | 15% |
| Academia/Research Institute/Think Tank | 9% | 14% |
| Media | 4% | 11% |
| Other | 1% | 0% |
| Total Number of Respondents | 113 | 140 |

Statistical Analysis

To attribute respondents to different stakeholder groups, their self-reported responses to the following question were used: [“Which of the following best describes your current affiliation?”](#)

Breakdowns for individual questions by stakeholder group can be found in the “Jamaica COS FY23 Tables with data breakdowns.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

Scale bucketing:

When mentioning **Low**, **Medium**, and **High** in the scales throughout this report: 1-6 is low, 7-8 is medium, and 9-10 is high.

Statistical significance:

Key statistically significant findings are denoted with an asterisk (*) throughout the report. Alternatively, they are discussed in the descriptions to the figures. Significance is measured at $p\text{-value} < .05$.

| Stakeholder Groups | No. | Percentage |
|---------------------------------|-----|------------|
| Government | 41 | 29% |
| Bilateral / Multilateral Agency | 25 | 18% |
| Civil Society | 17 | 12% |
| Private Sector | 21 | 15% |
| Academia | 20 | 14% |
| Media | 16 | 11% |
| Total | 140 | 100% |

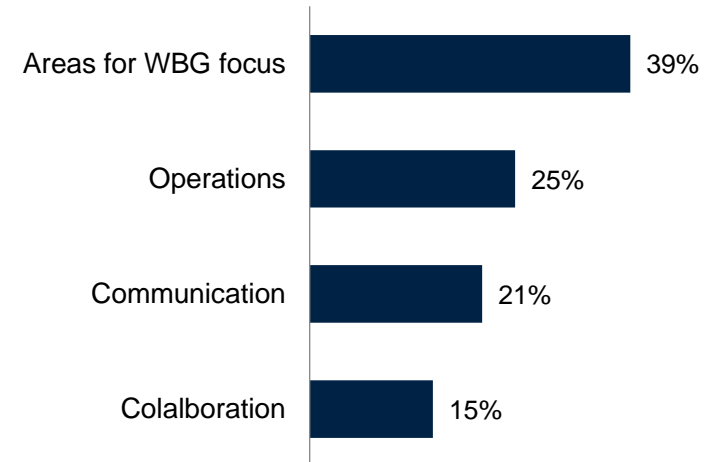
Qualitative Analysis

Regarding the qualitative part of the questionnaire, respondents were invited to share their thoughts about the ways in which the WBG could help to increase its effectiveness in Jamaica in the future:

“In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Jamaica? (Please be specific)”.

A total of 80 responses were received. They varied in length from a few words to a few sentences. The comments were broadly grouped into four categories based on their main theme (please see the figure to the right) and summarized in the section, “The Future Role of the World Bank Group in Jamaica”. Individual quotes were used throughout the report in relevant sections to illustrate the quantitative data.

Summary of the Main Themes in the Qualitative Comments



Indicator questions

A2_5. To what extent do you trust the World Bank Group to do what is right? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

A3. How effective has the World Bank Group been in achieving development results in Jamaica?

A4. The World Bank Group currently plays a relevant role in development in Jamaica, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A5. The World Bank Group's work is aligned with what I consider the development priorities for Jamaica, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A6. To what extent does the World Bank Group influence the development agenda in Jamaica? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

A7. How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?, Scale: 1-10 (1: Not significant at all – 10: Very significant)

To what extent is the World Bank Group an effective development partner in Jamaica, in terms of each of the following? – Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

C2. Responsiveness to needs, **C3.** Access to WBG staff and experts, **C4.** Flexibility when circumstances change, **C5.** Being a long-term partner,

To what extent is the WBG an effective development partner in Jamaica, in terms of collaborating with the following groups: – Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

C7_1. Collaboration with the national government

C7_5. Collaboration with the private sector

C7_6. Collaboration with civil society

C7_7. Collaboration with other donor and development partners

C8_1 To what extent do you agree/disagree with the following statement? – The WBG's financial instruments meet the needs of Jamaica (i.e., investment lending, Development Policy Loan, Trust Funds), Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

C8_4. To what extent do you agree/disagree with the following statement? – The WBG provides financial support in a timely manner., Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

C10_1. To what extent do you agree/disagree with the following statements about the World Bank Group in Jamaica? I am satisfied with the **quality** of the WBG's advisory services and analytical work in Jamaica. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

C10_5. To what extent do you agree/disagree with the following statements about the World Bank Group in Jamaica? The WBG's advice and recommendations are **tailored** to Jamaica's context. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

Note: Corporate Scorecard questions are highlighted **RED**