

Study and Mapping
of Cultural and
Creative Industry
Ecosystems in
Tijuana





Authors

Jorge Francisco Sánchez-Jofras
Ingrid Kuri-Alonso
Mayer Cabrera-Flores
Eduardo A. Durazo-Watanabe
Alicia León-Pozo
Creta Cota-Cota

EDITORS

Jorge Francisco Sánchez-Jofras
Alicia León Pozo

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Foreword

The Center for International Private Enterprise (CIPE) strengthens democratic institutions worldwide through participation in private enterprises and market reforms. Since its foundation in 1983, CIPE has collaborated with business leaders, public officials, and journalists to support the vital civic organizations for a democratic society. One of the key initiatives is strengthening entrepreneurship ecosystems, and advancing policies for economic development focused on youth and the participation of women.

In Latin America, CIPE has collaborated with civic organizations and business groups to develop projects that prompt civic participation. For example, in the last five years, CIPE has supported efforts in Guatemala to strengthen entrepreneurship in the creative industries. In Mexico, CIPE supports several projects. In Tijuana, it established a collaborative agreement with Tijuana Innovadora in 2021 to propel the creative industries and increase youth and women's participation in these industries.

John Zemko

Regional Director for Latin America and the Caribbean
Center for International Private Enterprise



Our appreciation

Finding the dynamics of Culture and Creative Industries in a bustling city like Tijuana is not easy; It has required effort, love, and dedication, together with scientific meticulousness. As a result, we present this publication before the International Center for Private Enterprise, our sponsor, and the society in general, who will find in this study a practical and effective instrument to benefit from the treasure of creativity.

Those of us who participate in this effort are pleased to present the result of many months of work to the community. At the same time, we are much obliged with the responsibility entrusted to us.

So here it is, work done.

José Galicot

Founder and President of Tijuana Innovadora

Research for the development of Cali Baja Region

We are pleased that multiple actions continue to take place based on the visionary initiative called Tijuana Innovadora under the leadership of Don José Galicot.

First, the Study and Mapping of Cultural and Creative Industry Ecosystems in Tijuana was developed in alliance with Tijuana Innovadora, under the auspices of an international cooperation program with the Center for International Private Enterprise (CIPE), through the Mexico Project: Fostering Democratic Culture by Addressing Citizen Insecurity and Encouraging Youth Entrepreneurship and Civic Participation.

Secondly, this project was possible due to the experience of CETYS University professors and researchers working with the Centers of Excellence. We favor research on innovation in cultural and creative entrepreneurship due to its strategic relevance to the binational region by integrating research groups from the Institute for Innovation, Entrepreneurship and Social Change (INNSIGNIA). These actions are part of continuous efforts to study factors that bind together regional innovation ecosystems, which are vital for triggering social and economic changes for the development of the CaliBajaRegion.

Thirdly, I want to stress the importance of communicating research carried out by our faculty, in this case, in support of young creatives and women entrepreneurs of the Cultural and Creative Industries. Success models will be documented in a second phase to support the ecosystem's growth.

We also thank the Advisory Collective ComunaCreativa, a sphere of Tijuana Innovadora, for their contributions during the research process, likewise the creative professionals, young people, and women who participated in discussion groups. Similarly, we are grateful to all those who joined in this effort as agents of Tijuana's cultural and creative economy.

Finally, we remain committed to developing this field with Tijuana Innovadora and CIPE.

Dr. Fernando León García
President of the CETYS University System

Groundwork:

Why promote citizenship and strengthen the Cultural and Creative Industries?

In Tijuana, you can eat in a sophisticated restaurant run by an internationally recognized chef; Still, in a vacant, unpaved lot, you can also enjoy Gourmet Food Trucks specialized in combining concoctions and alchemies from the region.

In both spaces, you can find officials, public figures, artists, investors, students, and tourists doing business, politics, public relations, or simply enjoying that distant and ethereal right to leisure.

The blending of cultural backgrounds in this region has been a media subject since the foundation of the border. Hybrid and dynamic, the talents of Tijuana have been sensitive and audacious thanks to -among other characteristics- its geographical advantage. A circumstantial event in this land has generated services, opportunities, products, and strengths that could not occur in another latitude, including the Cultural and Creative Industries, CCI for short.

Promoting these industries was an early initiative of our movement. Since 2010, Tijuana Innovadora has identified the need to explore the potential of combining the arts with the digital turn and its connections to the creative economy. We did it by integrating technology and culture.

Expanding 12 years within Tijuana Innovadora, Comuna Creativa has fostered links with creative professionals and cultural collectives while at the same time building a democratic dialogue of ideas and committed alliances.

As part of these efforts, we present the Study and mapping of CCI in Tijuana. A dream come true, thanks to the trust of the Center for International Private Enterprise and the dedication of an Advisory Collective of specialized experts, the rigorous academics of CETYS Universidad, and the young and creative professionals. They shared their time and experience in carrying out this study.

This work is the first part of the Mexico initiative: Fostering Democratic Culture by Addressing Citizen Insecurity and Encouraging Youth Entrepreneurship and Citizen Participation. Mapping with quantitative and qualitative analysis will lead to the elaboration of roadmaps and acceleration for all creatives who yearn for comprehensive development to participate, dialogue, and express themselves through the fascinating world of the creative economy.

#ComunaCreativa

Claudia Basurto

What are the cultural and creative industries?

The creative economy and cultural and creative industries are relatively new concepts, introduced in some industrialized countries in the course of the 1990s. Australia was a pioneer, but it was in the United Kingdom where they gained the most momentum, with the integration of the Department of Culture, Media and Sport (DCMS). They are considered economic development policies, but also a cultural phenomenon that incorporates the values of the knowledge society and commercializes symbolic content. So it was that governments began to view the cultural sectors as productive areas rather than simply activities demanding public resources allocated on the basis of their intrinsic value or outside the market (Flew & Cunningham, 2010).

Originally, the cultural industries were based on models of centralized production (media) and real-time consumption (artistic events) following production, distribution, and consumption schemes. Later, creative industries based themselves on technology and education policies, but were also able to operate in decentralized networks of production and distribution of digital content and consumption mediated by new technologies.

In 2010, the United Nations Conference on Trade and Development (UNCTAD) classified the creative industries in four areas: heritage, arts, media, and functional creations.




Following this, CCI were identified based on the contributions of human creativity, which has a dual nature – that is, it is both a product and a symbolic good at the same time, thus allowing the recognition of some degree of intellectual property.

In harmony with this conception, the Inter-American Development Bank (IDB) has defined the “Orange Economy” as the set of linked activities that allow ideas to be transformed into cultural goods and services, with their value determined by their intellectual property content (Buitrago & Duque, 2013).

Following these ideas, digital technology and intellectual property are the elements that generate capital gains in CCI.

In Mexico, there is a notable interest in understanding and reflecting on these dynamics, due to their sociocultural, political, and economic effects. Initially, studies focused on the characteristics and infrastructure of the cultural sector, both at the national level (Conaculta, 2003) and at the state level (Cruz-Vázquez, 2011), and on the contribution of CCI as industries protected by copyright (Piedras-Feria, 2004), intellectual property (ProMéxico, 2013), government policies (Covi-Druetta, 2013), and their link with the sociocultural environment (García-Canclini & Piedras-Feria, 2008). Similarly, attention has been drawn to regional (Valdivia, 2021) and local (Sánchez-Jofras & Kuri-Alonso, 2020) dynamics. It is a growing research field with permanent seminars at the UNAM’s Center for Research on North America (CISAN).

Methodological proposal for the study



General goal

Characterize the ecosystem of creative industries in Tijuana, Baja California, by mapping its strategic actors.

Specific goals

01

Classify the strategic actors that make up the ecosystem of creative industries in Tijuana, Baja California.

02

Carry out a situational analysis of the ecosystem of creative industries, and of youth and gender inclusion processes in Tijuana, Baja California.

03

Identify actors and mechanisms that contribute to the sustainability and future funding of the sector.

To perform the study, the industry mapping methodology proposed by the National Consulting Center (CNC, 2019) was taken as a reference. Accordingly, the project was organized in three phases to develop an initial characterization of the cultural and creative industries in the city of Tijuana, Baja California. These phases include information gathering and analysis techniques, based on both quantitative and qualitative approaches.

The first phase will involve a classification of the strategic actors that make up the creative industry ecosystem in Tijuana. To this end, a couple of quantitative instruments were designed, one aimed at young creatives, and the other aimed at creative professionals. By administering these instruments and analyzing secondary sources, we characterized economic activities and prepared a directory of strategic actors, as well as a georeferenced map.

In the second phase, we conducted a situational analysis of the creative ecosystem and of youth and gender inclusion. For this, qualitative data collection techniques were used, such as focus groups. Three discussion tables were organized, the first aimed at professionals, entrepreneurs, and creatives in general, the second aimed at young people associated with or planning to become involved in this creative ecosystem, and the third one focused on women participating in the ecosystem. From the analysis of the tables, a strategic diagnosis (SWOT) was made of the creative industries in the city.

In the third phase, desk research was conducted to identify a series of mechanisms with the potential to contribute to the funding and sustainability of the sector, resulting in an annexed document. Finally, the fourth phase consisted in the technical documentation of the study and the presentation of the results.

Below is a table that shows the relationship between study categories, methodological strategies, deliverables, and evidence.

01 Classify the strategic actors

Study categories	Methodological strategy	Deliverable	Evidence
------------------	-------------------------	-------------	----------

Economic activity, contribution to the labor market, intersectoral linkage, establishment of cross-border work networks, inclusion processes (women and young people), challenges and opportunities in general.

Design and apply a survey that allows the collection of information corresponding to each category.

Directory of key actors and general mapping.

Electronic with georeferenced mapping.



02 Conduct a situational analysis

Study categories	Methodological strategy	Deliverable	Evidence
Strengths, weaknesses, opportunities and threats of the most relevant sectors or those with the greatest presence in the creative economy in Tijuana, including youth entrepreneurship	Design a group interview script. Carry out directed group interviews (discussion tables), document a record of the process and SWOT analysis.	White paper of the situational analysis of the creative industries of Tijuana.	Written document. Photographic record of round-table discussions. Attendance record.

03 Identify financial sustainability mechanisms

Study categories	Methodological strategy	Deliverable	Evidence
Sponsors, public policies, and tools for escalation and internationalization.	Documentary research and group interviews.	Section within the white paper, recommendations and list with web links.	Written document.

Perspectives of the cultural and creative industries in Tijuana



Tijuana-San Diego, the binational region

The municipality of Tijuana is a strategic pole of development, due to its border with the state of California in the United States, in particular San Diego County. According to the National Institute of Statistics and Geography (INEGI, 2021), Tijuana has 1,922,523 inhabitants, half of whom are 29 years old or younger, while the population of San Diego is 3,298,634 inhabitants, of whom 21.4% are under 18 years old (U.S. Census Bureau, 2020). The Tijuana-San Diego binational region is the largest border urban agglomeration between Mexico and the United States, home to 34% of the total population in the international border zone (INAPLAN, n.d.).

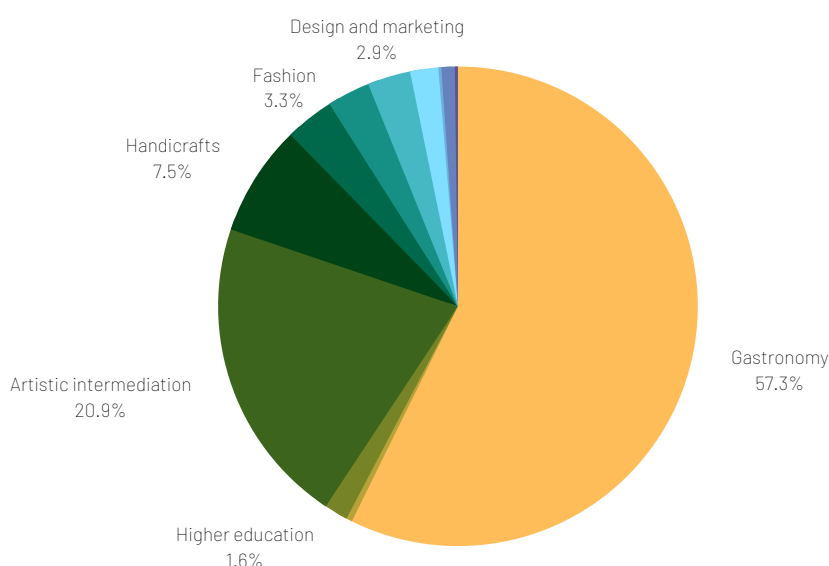


Photo by Matthew Hicks on Unsplash

The value of the cultural and creative economy in Tijuana

To gain insight into the economic dynamics of the CCI in Tijuana, secondary data was consulted in the Economic Censuses (2019) of the INEGI, as the most complete source to offer data disaggregated by municipality.

The data matrix was structured from the information collected on economic activity carried out in Tijuana, Baja California, between January 1st and December 31st, 2018. A total of 9,018 economic units linked to cultural and creative industries were identified, which represents 17.9% of the economic units registered in Tijuana in the aforesaid Economic Censuses (2019). This information allows us to present the distribution of these activities by census category.



The gastronomy industry stands out, accounting for over 50% of CCI, followed by artistic intermediation and auxiliary industries at almost 21%. They are followed, in descending order, by handicrafts at 7.5%, fashion at 3.3%, and publishing, design and marketing at 2.9%.

Source: Economic Censuses, INEGI 2019

Other points of note from the data from the INEGI Economic Census (2019):

6.4%

Of the total production in the city corresponds to CCI, which represents more than \$22 billion pesos.



In Tijuana, the added value of CCI accounted for as much as \$11.75 billion pesos, which represents 7.5% of the value of all economic activity in the city



CCI generate 7.5% of the city's gross census value added.

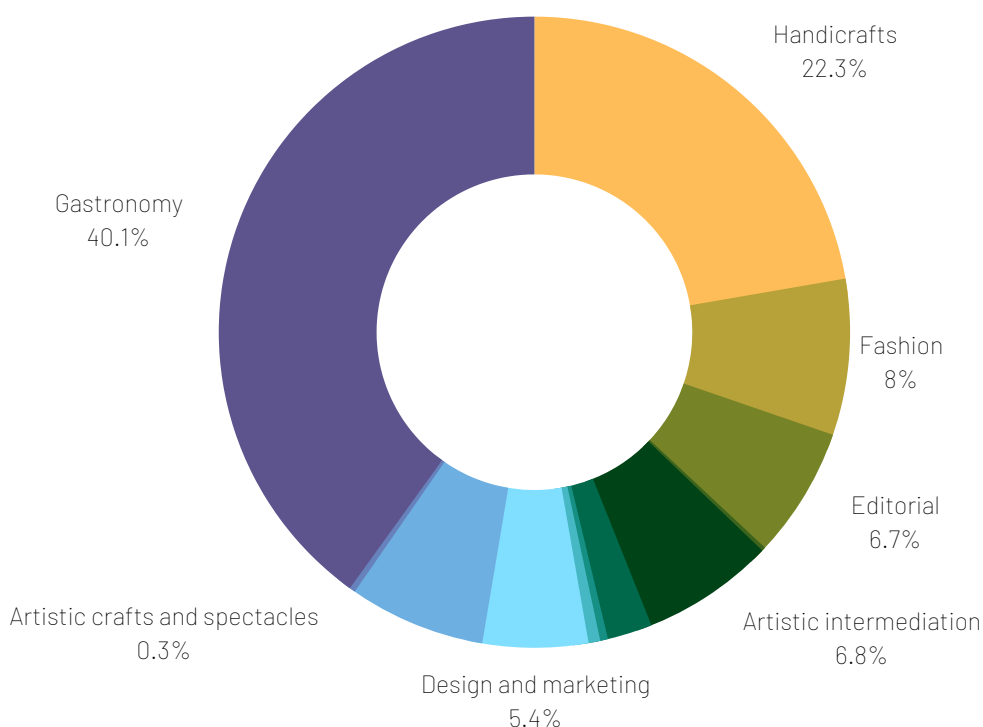


An analysis of the total gross production of the CCI in Tijuana shows that gastronomy accounts for the largest share at 36.8%, followed by handicrafts at 23.3%, the fashion industry at 9.4%, the publishing industry at 7.8%, and then communication, audiovisual and radio broadcasting at 7%.

In terms of gross value added in the municipality, the gastronomy and handicrafts sectors stand out again, representing 33% and 26.6% respectively, followed by the fashion industry at 10.4%. The publishing industry, artistic intermediation, higher education, audiovisual communication and radio broadcasting, and design and marketing all contribute between 5% and 6.5%.

Labor market contribution

Total creative employment in CCI was quantified using the INEGI registry (2019). According to this analysis, creative establishments in Tijuana employ around 71,511 people, which represents 12.2% of the employment estimate in the entire local economy. The figure below presents the distribution of employment in each creative sector, with gastronomy, handicrafts, fashion, and higher education leading the way.

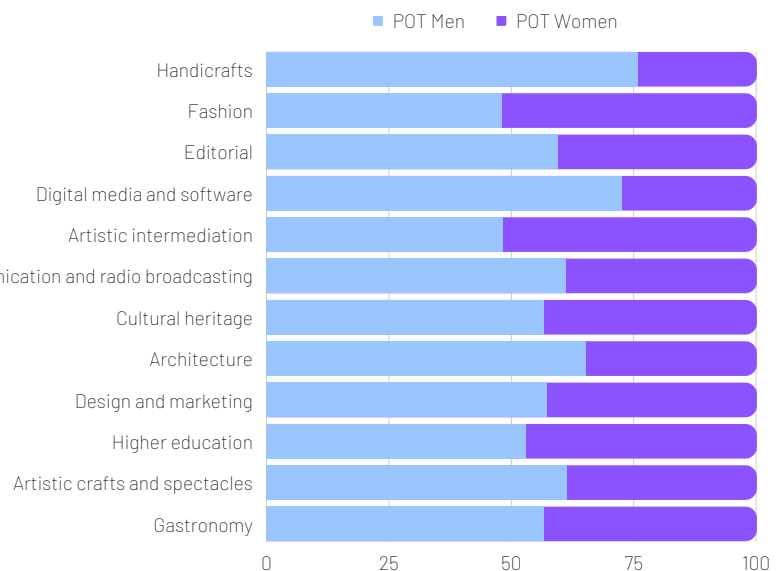


Source: Economic Censuses, INEGI (2019).

The CCI represent 8.4% of total remuneration in Tijuana, which is equivalent to more than 5 billion pesos (INEGI, 2019). The sectors with the highest percentage of remuneration within the CCI are, once again, handicrafts, gastronomy, publishing, fashion, and higher education. It should be noted that, despite the fact that the gastronomy sector has the highest percentage of employed personnel (40.1%) of all the CCI, it is the handicrafts sector that has the largest proportion of remuneration, at 34.6% of total CCI employee remuneration, followed by gastronomy at 23%, the publishing industry at 10.6%, and fashion at 10.2%. These four sectors alone represent 78.3% of CCI remuneration in Tijuana, which is equivalent to almost 4 billion pesos (INEGI, 2019).

Women's participation in CCI

Women represent 40.3% of the total employed personnel (TEP) in the CCI. They are particularly underrepresented in sectors such as handicrafts, digital media, and software and architecture, where they account for 24.2%, 27.5%, and 34.8% of employed personnel, respectively. On the other hand, they enjoy greater representation (albeit only very slightly) in sectors such as fashion and artistic intermediation, and auxiliary industries, at 52% and 51.7% respectively.



Source: Economic Censuses, INEGI (2019).



Mapping the Cultural and Creative Industries of Tijuana

Sectors and activity categorization of the CCI

To categorize the CCI sectors and activities, economic classifiers were considered: the Mexican National Accounts System and the North American Classification System (NAICS). Similarly, the dimensions of the matrices proposed by the United Nations Conference on Trade and Development (UNCTAD) in its 2010 report were compared, as were those identified by the Inter-American Development Bank (IDB), referred to under the heading of “Orange Economy” (IDB, 2013). Additionally, we sought to establish a correspondence with the sectors and activities present in the area, and the categories were discussed in consultation with expert teachers from CETYS Universidad and with the Art, Culture, and Creative Industries Advisory Collective, convened by Tijuana Innovadora.

Based on the described methodology, the cultural and creative industry sectors were identified as follows:

1. Performing arts and shows
2. Visual and plastic arts
3. Handicrafts
4. Architecture
5. Marketing
6. Fashion
7. Digital creative services
8. Mechanical and electronic design
9. Audiovisual production
10. Graphic, digital or 3D design
11. Music production and promotion
12. Gastronomy and beverage production
13. Supporting services



Mapping methodology

The mapping of CCI is a central component of this study, according to BOP Consulting:

It is a quick way of defining a task that encompasses a whole series of analytical methods for collecting and presenting information about the variety and reach of the creative industries. The main intention of the mapping is to put the economic value of creative industries into perspective, particularly in places where almost nothing is known about them (2010: 9).

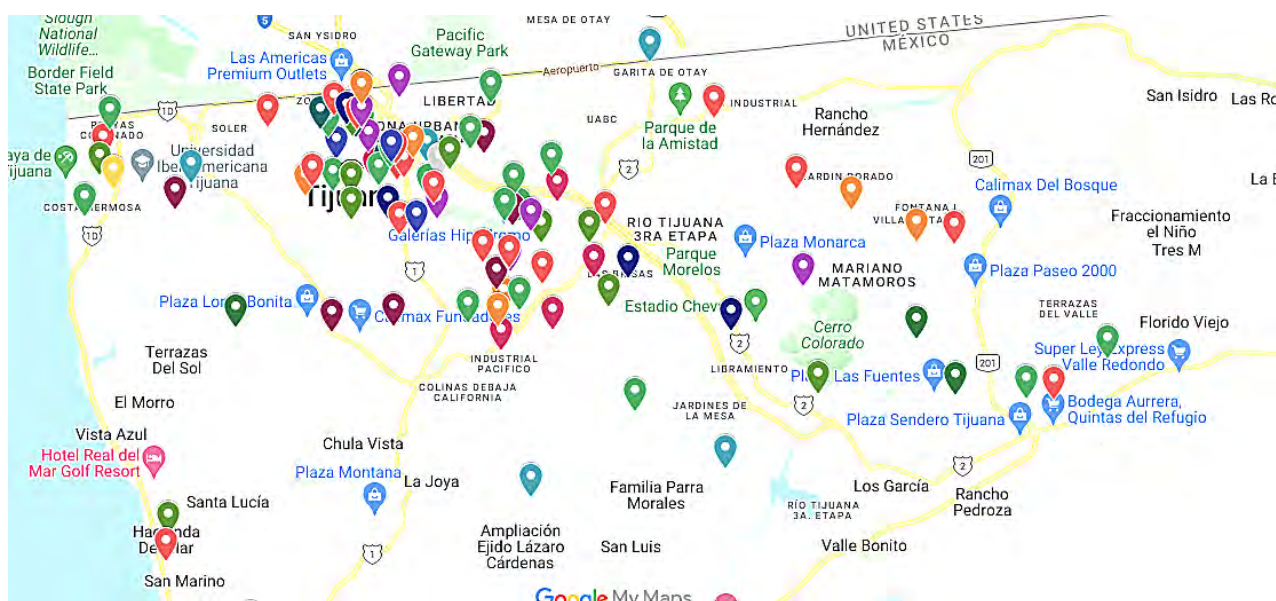
Thus, this exercise includes the location map and the analysis of secondary data, particularly data from the Economic Censuses (INEGI, 2019) as well as data collected by the instruments designed to conduct this research.

Location map

Between April and May 2022, 130 entities were registered and gave express authorization for their inclusion in the map in the survey. They are located in the metropolitan area of Tijuana, with several entries in the coastal area corresponding to Rosarito, and only one entry gives its address in San Diego, CA.

The map can be viewed here:

<https://www.google.com/maps/d/u/0/edit?mid=1ktfSsdnbZomDnmZSMkxCguX2tvpPEnte&usp=sharing>



Source: Own work with Google Maps.



The information was processed using Google Maps and the markers are classified by color according to the sector. When the cursor is placed over the individual markers or pins, a table is displayed with detailed information on the entity, including its address, telephone number, social networks with hyperlinks, sector, and subsector.

✕

Títtere Vivo

117

Domicilio: Adolfo López Mateos 18 Lopez Mateos 22030
Tijuana, B.C.

Delegación Playas de Tijuana

Teléfono: 6647617269

Webpage: www.titerevivo.com

Facebook: <https://www.facebook.com/TitereVivo>

Instagram: <https://www.instagram.com/titerevivo/>

Twitter: <https://twitter.com/TitereVivo>

Tik tok: <https://www.tiktok.com/@titerevivo>

Sector: Artes escénicas y espectáculos

Subsector: Producción de eventos musicales o escénicos

📍 32.49632, -116.99105

Source: Own work with Google Maps.

The mapping features were classified into 13 categories and ordered by frequency. This systematization allows us to count by category and unit, and the information is displayed from highest to lowest according to the frequency of each sector.

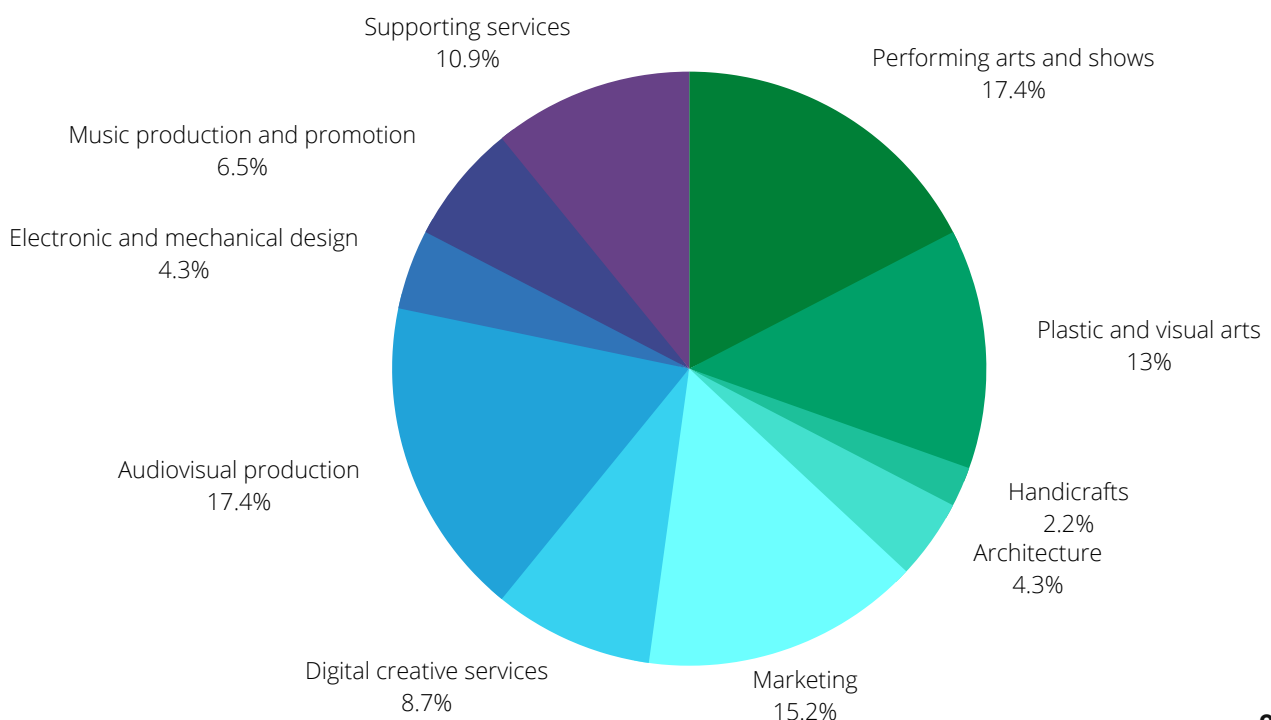
Artes visuales y plásticas	25
Performing arts and shows	23
Audiovisual production	15
Graphic, digital or 3D design	13
Digital creative services	10
Marketing	9
Fashion	8
Supporting services	7
Music production and promotion	5
Architecture	4
Gastronomy and beverage production	4
Handicrafts	3
Others	3
Mechanical and electronic design	1

Creative professionals

Sectors and activities in the CCI of Tijuana

The data obtained through the questionnaires distributed to creative professionals offer an overview of the sectors and activities linked to the cultural and creative industries of Tijuana. Two instruments were simultaneously administered: the long version of the questionnaire to be answered in 15 minutes and the express version of the questionnaire to be answered in 2 minutes. The first instrument was answered by 47 participants, while 157 responses were obtained from the second. The extensive questionnaire made it possible to filter economic activity between companies and independent agents, while the express questionnaire made it easier for the participants to define the sector in which they carry out their activities, with the possibility of specifying services or specialties within their area. The results of the exercise are presented separately.

Based on the results of the extensive questionnaire, the registered sectors that feature most prominently are performing arts and shows and those relating to audiovisual production. In second place comes marketing, followed by visual and plastic arts and support services for cultural and creative industries. Also notable is the digital creative services sector.



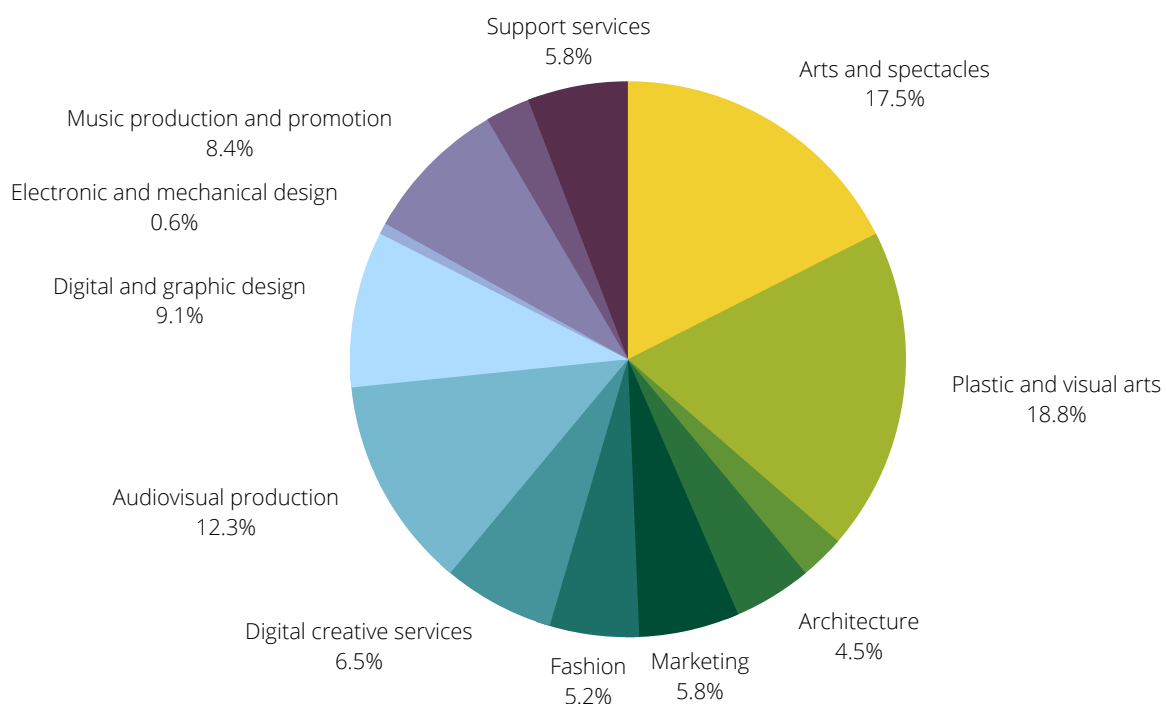
Notable within performing arts and shows are organizations dedicated to music performance and singing, as well as the production of musical or stage events. The audiovisual production sector, on the other hand, is mainly dedicated to production and filming, but also includes preproduction, screenwriting, and artistic creation, postproduction and editing.

Marketing organizations are engaged in advertising and content production as well as strategy and branding services, while the digital creative services sector offers digital marketing and software development services. It is worth noting that the visual and plastic arts sector primarily involves artistic production, although art trade, research and curatorship are also represented.

In the music production and promotion sector, sound recording studios are especially noteworthy, as is the organization of events, festivals, and concert tours. Lastly, support services for CCI include public relations, intellectual property and copyright, qualification and education, project management, and professional talent hunting.

Based on the express questionnaire aimed at creative professionals, we were able to identify the activities involved in the most prominent sectors. In addition to those already mentioned, the performing arts and shows sector is complemented with dance and acting. In visual and plastic arts, the category of other artistic expressions encompassed several answers.

In the digital creative services sector, creatives highlighted the activities of multimedia design, digital marketing, video games, interactive and virtual reality (VR), and online content distribution. In audiovisual production, services like sound design, as well as location, casting and props, were mentioned. Graphic, digital or 3D design includes graphic design, photography, and video, as well as web development and digital applications (apps). Additionally, the music production and promotion sector features musical composition, live event production, postproduction of sound recordings, and growingly, online editing and streaming services.

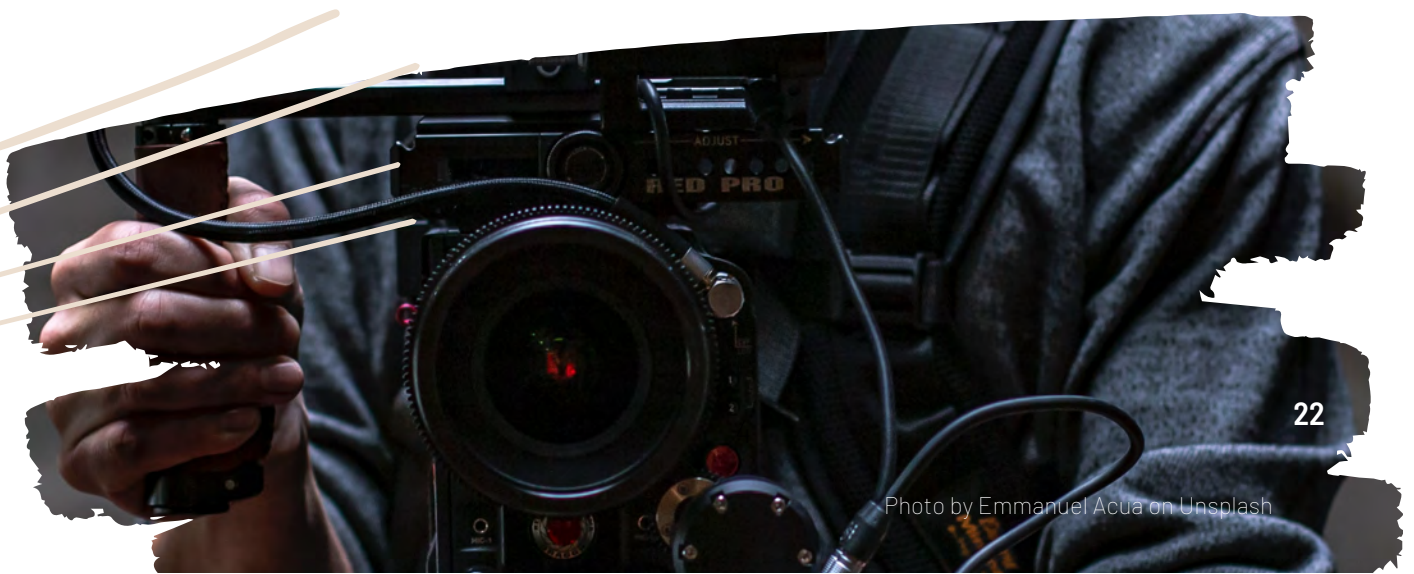


Companies and independent professionals

The extensive questionnaire for creative professionals indicates that 53.95% of participants carry out economic activities as independent professionals while 46.05% do so as a company. Further, 40.43% are self-employed professionals, while 29.79% work in small companies (with up to 50 workers) and only 6.38% work in companies with over 50 workers.

In terms of total employed personnel (TEP) by age range, most heavily featured is the group between 25 and 35 years of age, followed by those aged between 35 and 44. Nine of the employees are full-time workers and only one is a volunteer or intern, while four are independent workers or freelancers.

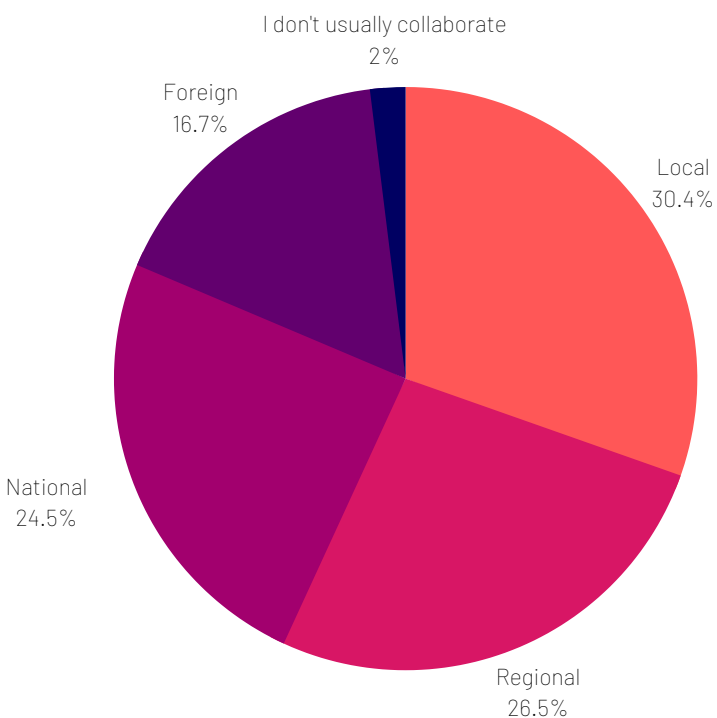
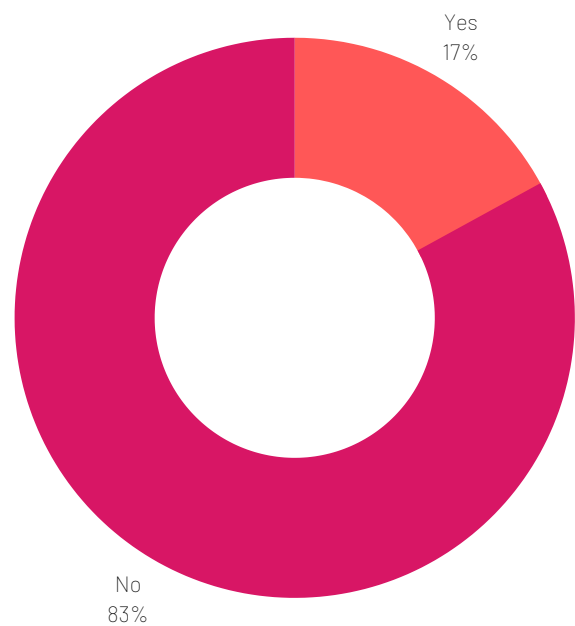
Options	Average amount	Total number
Full-time workers	9	428
Unpaid volunteers	1	45
Interns	1	56
Independent workers/Freelancers	4	207



Findings

Interregional linkages

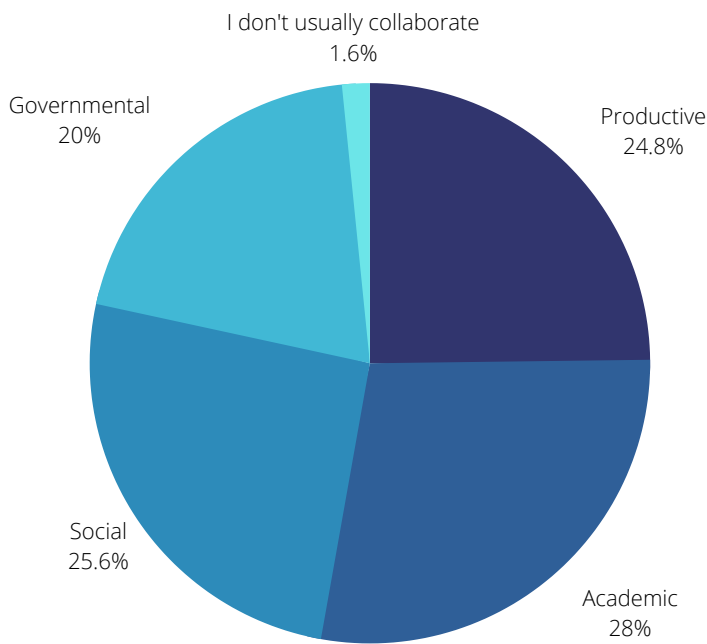
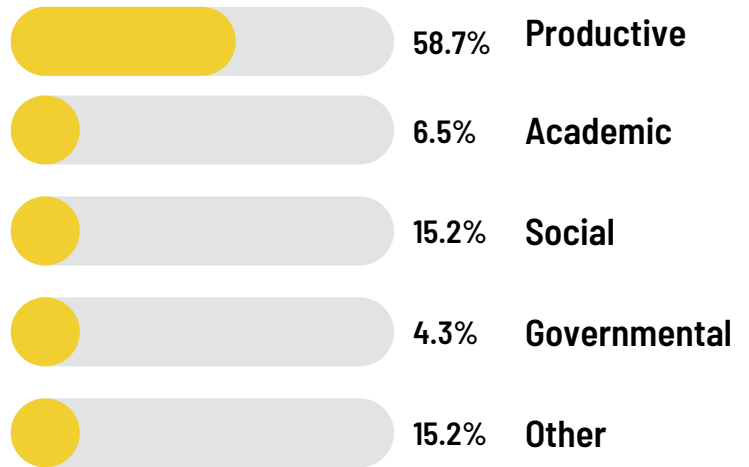
Our findings show that 17.02% of CCI companies in Tijuana benefit from foreign investment, while 82.98% lack this. Inputs obtained abroad illustrate the cross-border dynamics of these companies, and these include education and mentoring, firstly, and then to a lesser extent, supplies and technology. At the same time, the services offered to the international market are associated primarily with demand-driven production, followed by design and ideation services, and then marketing and customer services.



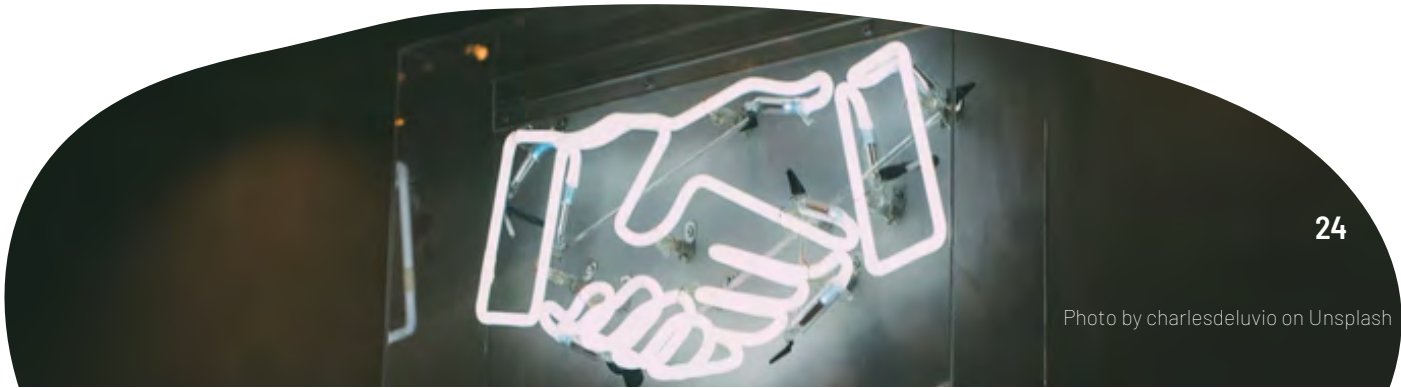
Concerning collaboration with other organizations or companies, the participants report that 30% of entities with which they partner are local, 26% regional, 25% national, and 16.7% foreign. Only 2% do not collaborate with others. Altogether this shows the diverse nature of collaboration in the CCI.

Intersectoral linkages

It was found that the vast majority of respondents belong to the productive sector (58.70%), followed by the social sector (15.22%), academia (6.52%), and government (4.35%). Similarly, 15.22% indicated that they belonged to another sector, providing the following responses: cultural, independent-educational, art, and cultural-musical.

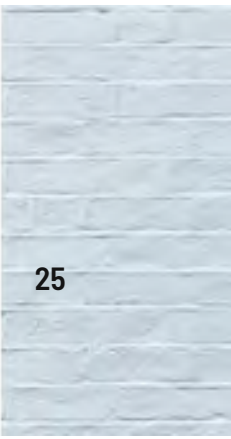
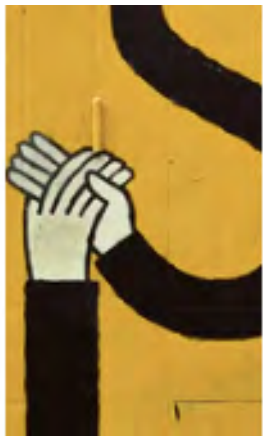
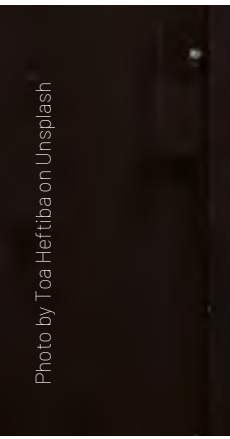
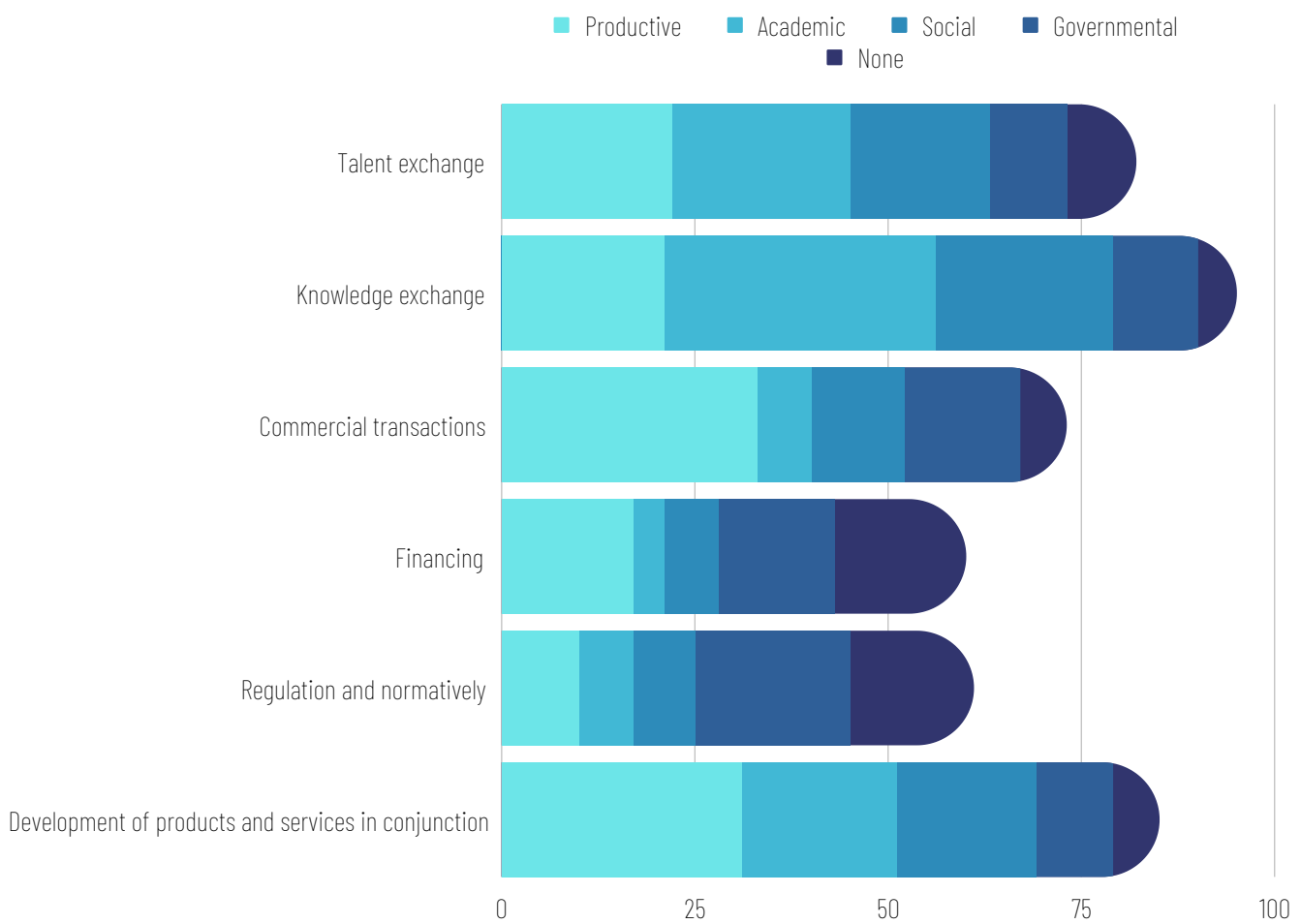


Respondents were asked to note the sectors with which they were closely linked and had strong partnerships. The responses reveal a clear tendency to associate or collaborate with the academic sector (76.09%), followed by the social sector (69.57%), the productive sector (67.39%), and the government sector (54.35%). It is clear that collaboration occurs between sectors, since only 4.35% of those surveyed report not collaborating.



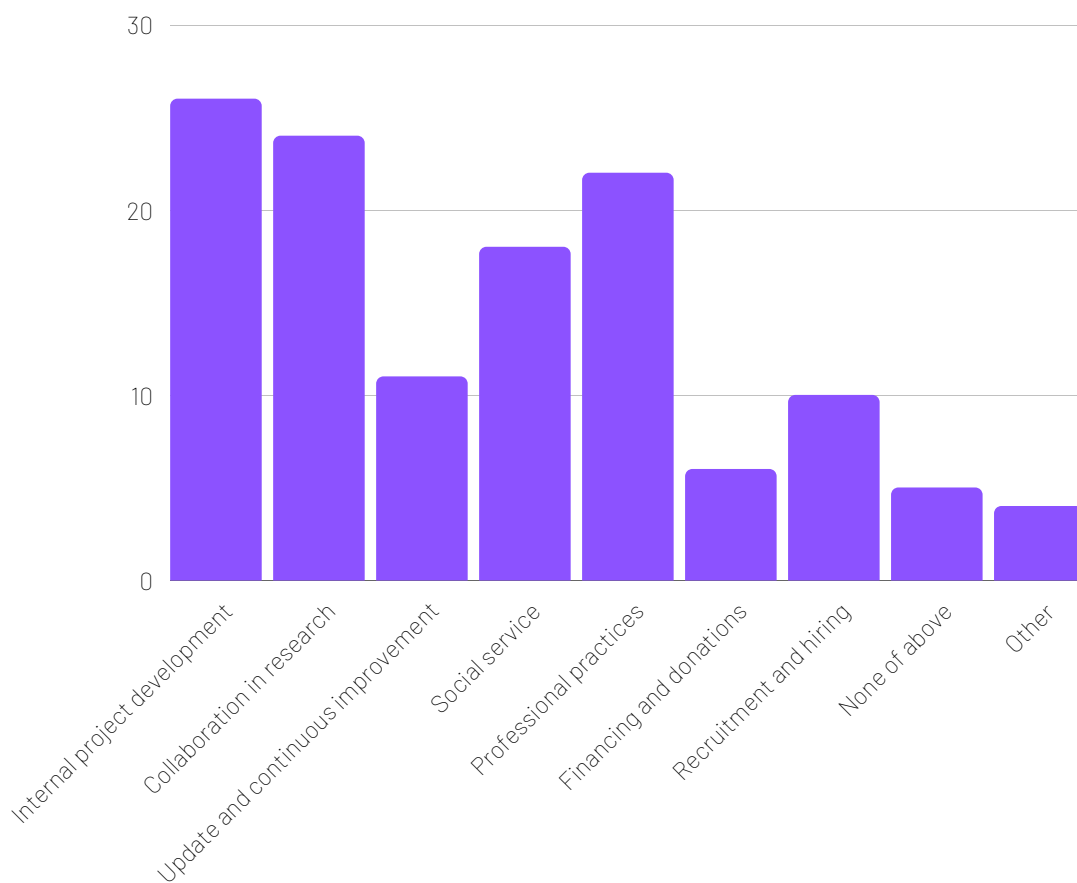
With the aim of gaining deeper insight into the type of interaction that occurs between sectors, six interaction options were established and the strength of this interaction was measured by sector. The options were talent exchange, knowledge exchange, commercial transactions, funding, regulation and standards, and joint development of products and services.

For talent exchange, it was found that there is most interaction with the academic sector (50%). In knowledge exchange, the most common sector is also academia (76.09%). For regulation and standards, the sector that sees the most interaction is the government sector (43.48%). Finally, for the category of joint development of products and services, the most common sector for interaction is the productive sector (67.39%).





Specifically, collaboration with educational centers occurs more frequently to develop internal projects (56.52%), followed by collaboration in research and internships (52.17%), social service (39.13%), development and continuous improvement (23.91%), recruitment and hiring (21.74%), and funding or donations (13.04%). Other types of collaboration were found to a lesser extent: development of workshops, qualification, and cultural presentations.



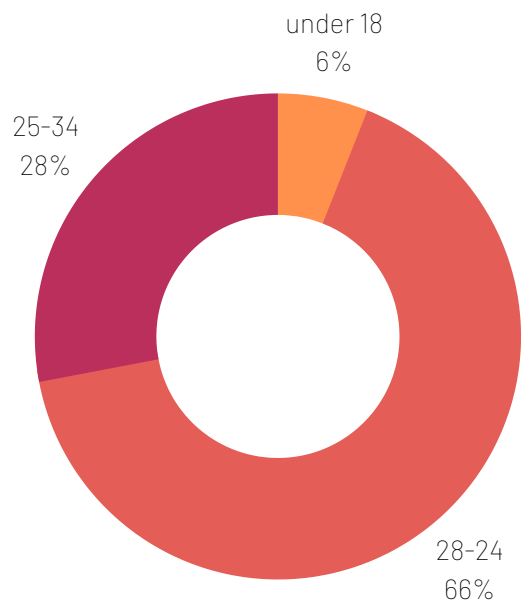
Young creatives

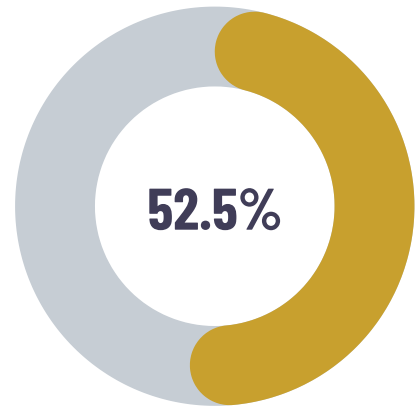
Demographics

The survey of young creatives was focused on learning about the experiences, concerns, and expectations of young Tijuana residents who identify as part of the cultural and creative industries, and contributing to their visibility from their own experiences.

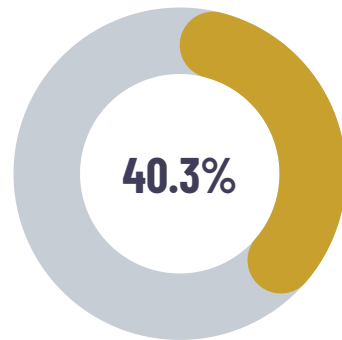
This survey focused on young people between the ages of 15 and 29 who are currently part of the CCI, whether as independent professionals, employees, interns, volunteers or students.

The highest response rate was found among 24 to 28-year-olds at 66%. Of these, 52.52% identify as women, 40.29% as men, and 5.04% as non-binary, while 2.16% preferred not to say. In addition, 2% reported living with a disability.

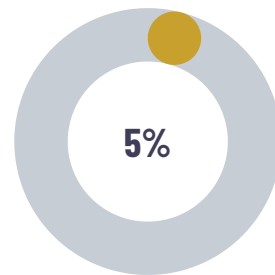




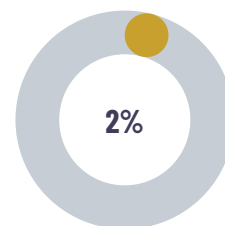
They identify as female



They identify as male



They identify as non-binary



Live with a disability

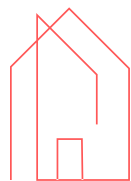
Of all the young people surveyed, 90% are only Mexican and the remaining 10% also hold US nationality as dual nationals. Since Tijuana is a border city, the inhabitants of both sides of the border share a close relationship; more than 50% of young people have a visa to cross into the United States, and do so at least once a month.



Photo by Allison Heine on Unsplash



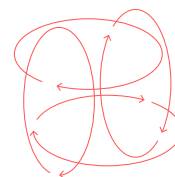
Likewise, they were asked about their area of professional training, either as students or professionals. The greatest proportion of respondents are training or trained in civil engineering, architecture or design (45.71%), followed by artistic education or music (22.86%); industrial engineering, processes and manufacturing (6.67%); administrative sciences, tourism and marketing (5.71 %); renewable energies, ecology and environmental management (5.71%); philosophy and humanities (4.76%); technology, electronics and computer science (3.81%); languages (1.90%); political sciences, law and international relations (0.95%); and social sciences, history, and social work (0.95%).



45.71%
Civil engineering,
architecture or
design



22.86%
Artistic education of
music



6.67%
Industrial engineering,
manufacturing and
processes



5.71%
Management sciences,
tourism and marketing

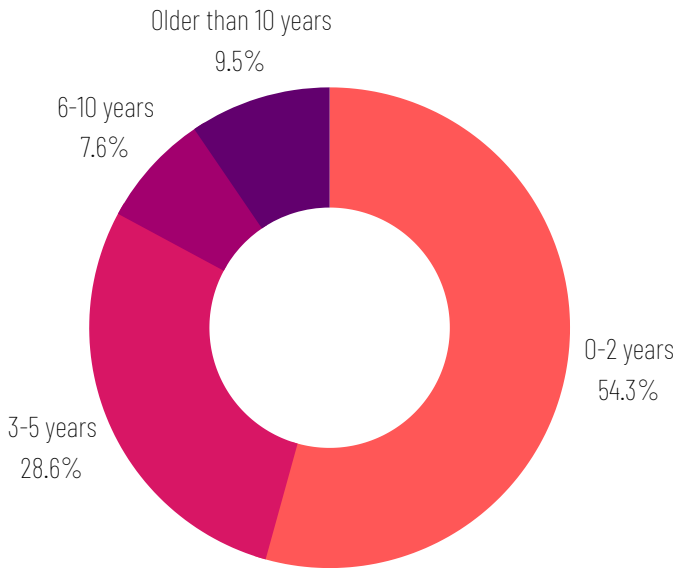


5.71%
Renewable energies,
ecology and environmental
management



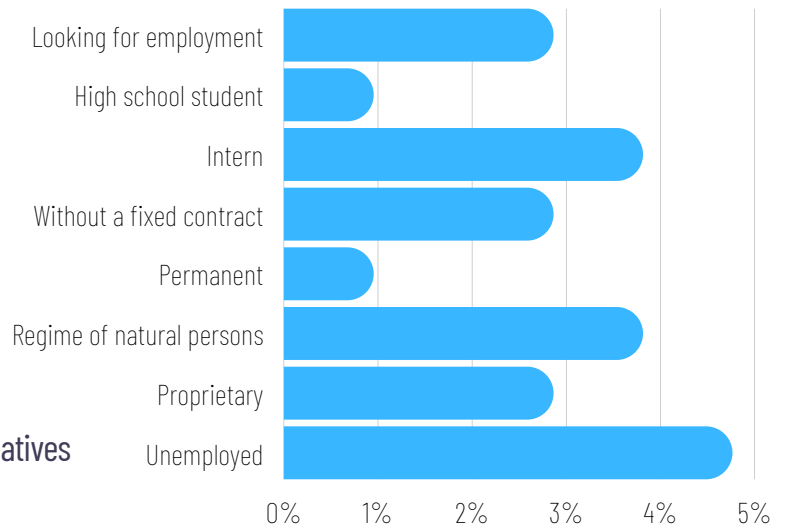
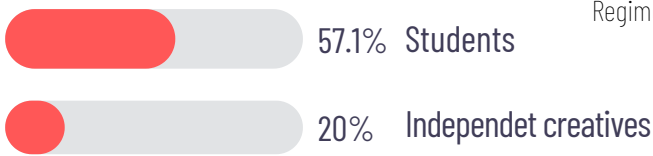
5.71%
Philosophy and
humanities

Inclusion processes

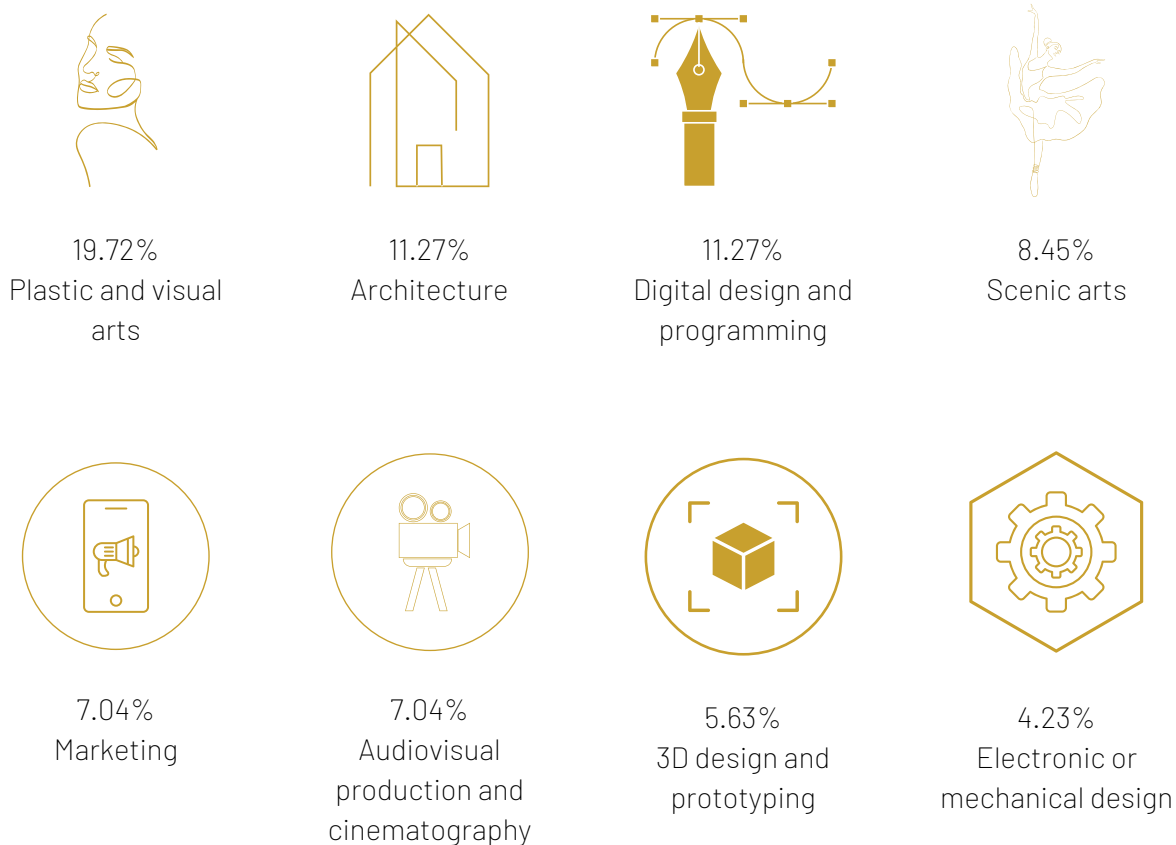


It was found that the majority have been part of the CCI for 0-2 years (54.29%), followed by 3-5 years (28.57%), 6-10 years (7.62%), and more than 10 years (9.52%).

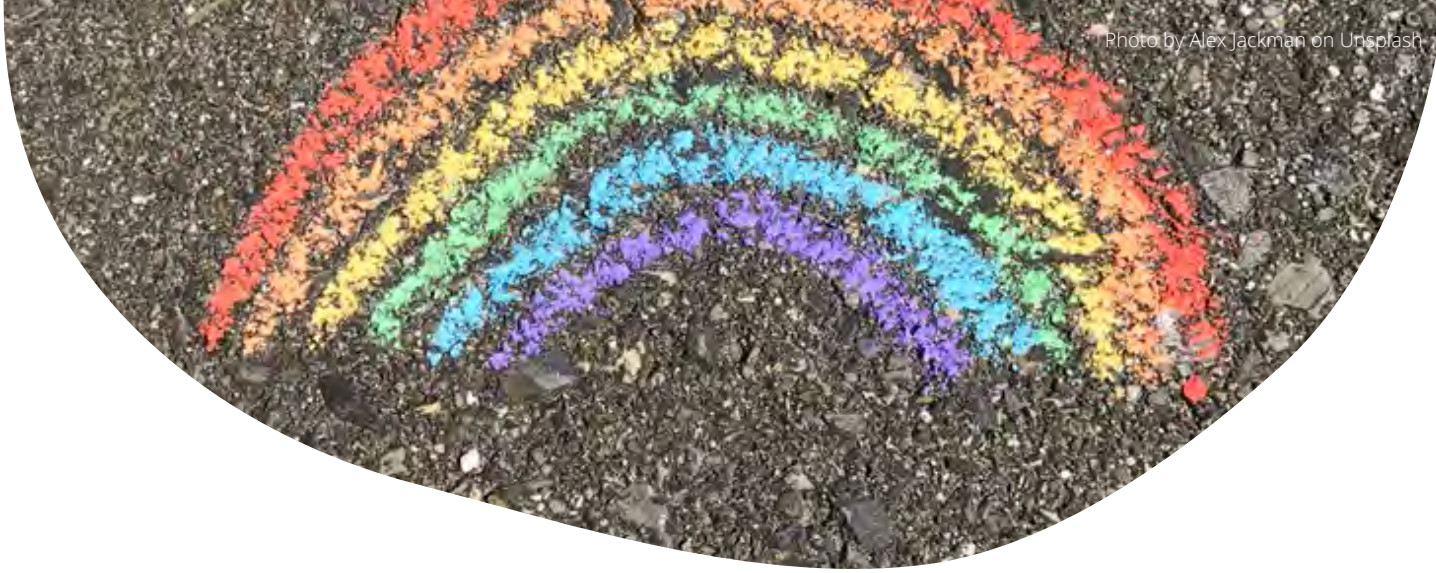
Regarding the type of involvement in the CCI, the two main areas of youth participation are as university students (57.14%) and as independent creatives (20%).



As for the CCI subsector in which they currently operate or would like to do so in the future, the responses show visual and plastic arts as the most common subsector at 19.72%, followed by architecture on the one hand, and digital design and programming on the other (each at 11.27%).



In addition to the previous subsectors, the following were also found, but less frequently: fashion (2.82%); music production and promotion (2.82%); radio broadcasting, electronic or digital media and cinema (2.82%); cultural management (2.82%); museums, galleries and libraries (1.41%); production of alcoholic beverages (1.41%); artistic education (1.41%); development of software and digital applications (1.41%); video games, AR and VR and interactive (1.41%); literature and print media (1.41%); and public relations (1.41%).



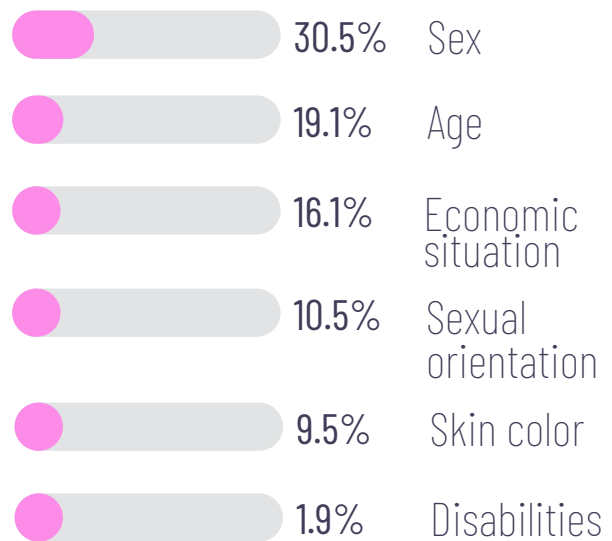
Discrimination

According to data from the National Council to Prevent Discrimination or CONAPRED (Consejo Nacional para Prevenir la Discriminación, 2017), the largest age group in Mexico is that of young people. One of the main problems that this group faces, in addition to poverty, is the structural discrimination perpetuated by the state, society, and the private sector.

Likewise, CONAPRED notes that young people are excluded from both employment and educational opportunities. They are discriminated against on various fronts, because of their social status, their physical appearance (linked to their economic status), the school where they studied, the place where they live, or even their posts on social networks.

This context contributes to keeping young people in poverty or unable to move up the social ladder.

In this sense, the young people surveyed were asked if they had experienced any form of discrimination or harassment during the last five years, with the three most common forms of discrimination being due to sex (30.48%), age (19.05%), and socioeconomic status (16.19%).



On the other hand, our analysis of job precariousness has shown that the majority do not have any legal benefits (57.14%), while only 38.10% have medical insurance, 8.57% life insurance, 9.52% a savings fund, 8.57% a retirement fund manager (AFORE), and 1.90% accounts and investments.

38.10%

Has medical insurance



Priorities

Young creatives were asked what they see as the priorities for the continued engagement and success of young people in the creative industries over the next two years. The five most common responses were the following:

46,48 % Help young creatives access affordable rentals, equipment purchases and funding.



Reduce cost barriers to access university or higher education.



Provide opportunities for training or coaching, including internships in companies.



Promote entrepreneurship assistance and financial education, including mentoring.



Ensure workplaces and creative places are safe and promote respect and diversity (social, cultural, age or sexual).



Entrepreneurship

Entrepreneurship and creativity go hand in hand, and young entrepreneurs also bring their energy and enthusiasm to these processes. Taking this into account, the survey of young creatives asked about the impact achieved by their activity within the CCI, where 5 was a significant contribution and 1 was no contribution. The following aspects scored most highly:

- ★★★★★ Creativity or individual expression
- ★★★★★ Education
- ★★★★★ Ideas and content
- ★★★★★ Activities
- ★★★★★ Services
- ★★★★★ Cultural experiences
- ★★★★★ Production
- ★★★★★ Network generation
- ★★★★★ Generation of spaces and collaborative practices
- ★★★★★ Employment opportunity for women
- ★★★★★ Employment opportunity for young people
- ★★★★★ Employment opportunity for people with disabilities
- ★★★★★ Cross-border presence (rest of California)
- ★★★★★ Presence in international networks
- ★★★★★ Cross-border projects (San Diego County)
- ★★★★★ International projects
- ★★★★★ International markets



Photo by John Schnobrich on Unsplash



The survey found that more than 40% of the young people surveyed have used their own capital to boost their activity in the CCI, while 29.58% have been supported with scholarships and 21.13% have not participated in any of the cross-border networks in San Diego or the rest of California. To a lesser extent, seed capital (8.45%), subsidies (8.35%), calls for professionalization (5.63%), public-private partnerships (5.63%), incubators (2.82%), and conversions (2.82%) were also mentioned.

To grow their businesses, young people most frequently report investing in marketing, registering their economic activity, and requesting a bank loan.

Invest in marketing
39.4%



Register my economic activity
35.2%

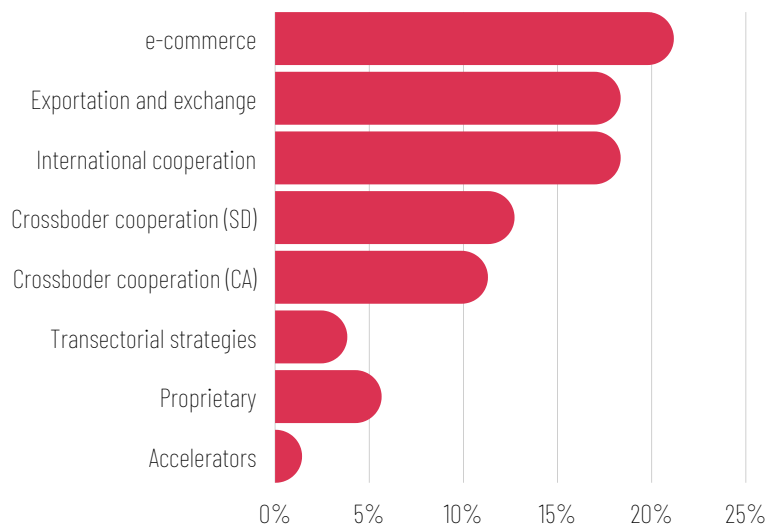
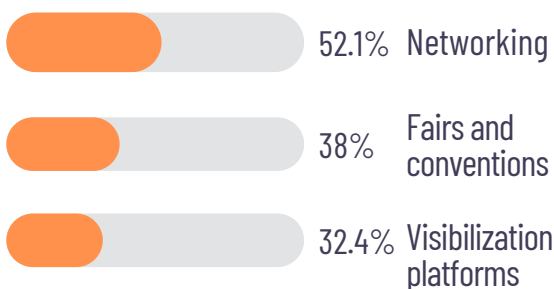
Ask for credit
25.4%

They were also asked if they have requested and/or received any monetary or in-kind assistance from the government for their business or practice, to which less than 20% responded affirmatively: just 17.14% have requested government assistance.

17.14% Has asked for government assistance

The respondents mentioned a number of assistance programs through which applications had been made, including the Program for the Promotion of Cultural Projects and Joint Investments (FONCA), the Fund for Quality Film Production (FOPROCINE), the Benito Juárez Scholarship, Support for Artistic Residencies, and support grants.

As for the visibility strategies that young people use to position themselves in the creative economy, it was found that the three most common strategies are networking (52.11%), fairs and conventions (38.03%), and visibility platforms (32.39%).



Situational analysis of cultural and creative industries



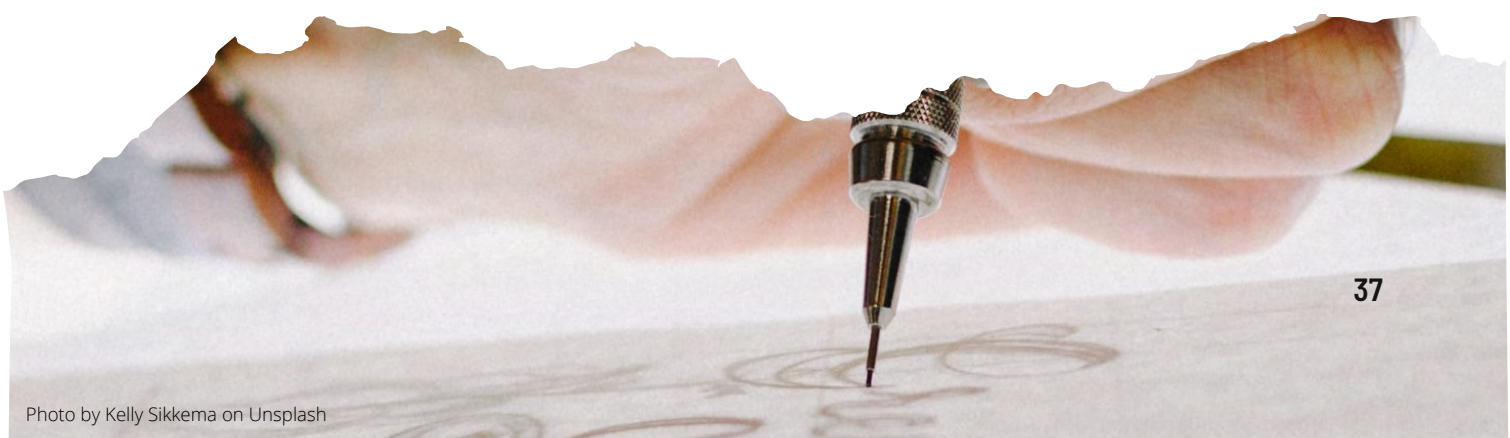
SWOT analysis of creative professional

STRENGTHS

- Organic capacity to build solidarity and affective bonds within the creative community
- Flow of markets, knowledge, talent, technology, and culture, based on cross-border dynamics
- Potential of the CCI to develop healthier societies and citizens.
- Access to digital platforms as a means of interaction
- Transcultural, cosmopolitan, diverse, and creative environment
- Nationally and internationally recognized industries (gastronomy, wine, and beer)

OPPORTUNITIES

- Emerging industries: cinema, digital animation, music, visual arts, video games, industrial design and furniture, and fashion
- Initiatives for the promotion of CCI, developed by the creative and academic communities (festivals and exhibitions)
- Events that attract international attention, e.g. World Design Capital
- Capacity of universities to concentrate and disseminate strategic information for this sector
- Geographic situation, as a vehicle to position Tijuana as the gateway of the CCI into Latin America
- Tijuana's potential for the incubation of creative projects
- The role of universities in accompanying the development of CCI





WEAKNESSES

- Economic and labor precariousness
- Limited access to calls for submissions and lack of familiarity with their processes
- Lack of unions and professional associations
- Snobbish perception of CCI
- Imbalance between a large number of creative professionals and a limited number of spaces for their projection
- Lack of specialists who study and promote CCI
- The economic potential of CCI is not evident
- Lack of intermediary mechanisms between creatives and the productive sector
- Lack of spaces for coworking

THREATS

- Lack of communication within government and the discontinuity of policies between administrations
- Reduction of government support
- Rigid, complex, and bureaucratic tax framework
- Economic activities traditionally focused on the lower value links of the production chains
- Unexploded art market
- Lack of public policies focused on stimulating the creative economy
- Heterogeneous development among the different CCI
- Lack of tax incentives
- Lack of a joint development vision with shared goals
- Paternalistic culture (government dependency)
- Insufficient urban infrastructure, violence and insecurity

The main strengths of the sector were identified with two discussion groups made up of creative professionals. First and foremost, there is a significant concentration of creative talent in internationally recognized industries such as gastronomy and wine and craft beer production, but at the same time, talent can also be found in emerging industries like cinema, digital animation, music, visual arts, industrial design and furniture, video games, and fashion. In addition, the participants perceive a community that organically fosters collaborative and supportive ties and takes advantage of the flow of talent, knowledge, and culture that the border supplies, together with digital media capacities. In terms of opportunities, the participants identify various initiatives to promote CCI, put into place by the creative community and universities.

Universities are vital in promoting the development of the cultural and creative economy in the region, providing access to strategic information and analysis. Despite favorable conditions, the participants report a series of factors that inhibit the construction of an ecosystem around the CCI, including notably an increase in demand for jobs that cannot be filled, limited access to calls for submissions, and a lack of professional associations and intermediary mechanisms with the productive sector. Similarly, they highlighted threats that include a reduction of government support; a rigid, bureaucratic fiscal framework that lacks incentives; and the discontinuity of policies and strategies between public administrations.

This set of inhibiting factors, coupled with precarious economic and employment conditions for creative professionals, insufficient urban infrastructure, and a context of violence and insecurity in recent decades, makes it difficult to consolidate a cultural and creative ecosystem. However, an organic capacity to build supportive and affective ties within the creative community, together with cross-border market flows, stimulates knowledge, talent, technology, and culture, allowing us to uphold the vision of Tijuana as the gateway into Latin America for CCI.

Photo by Leo Wierling on Unsplash



SWOT analysis of women in CCI

STRENGTHS

- Greater proportion of qualified women in CCI
- Strong participation of women as creators and academics in the field of CCI
- Collaborative practices of women, and critical and inclusive feminism
- Art as a way of life to deconstruct esthetic violence against women's bodies
- More aware, restless and empowered generations able to transform the industry

OPPORTUNITIES

- Movements that propose new identity profiles, as well as the recognition of women's participation in the economy and culture
- Incorporate humanistic, cultural, and artistic programs into upper secondary and higher education
- Socially responsible companies demand the participation of more women in management positions
- Promote pluralism and diversity from educational spaces
- Educational spaces to transform society and encourage the development of women

WEAKNESSES

- Economic and labor precariousness of women in the CCI
- Low participation of women in cultural management, in public service, and in senior management
- Significant asymmetry in the rate of economic participation between men and women
- Artists and creatives lack training in entrepreneurship, administration, and business
- Absence of public policies that stimulate the participation of women in the CCI
- Lack of data that makes women's participation in CCI visible
- Lack of a regulatory and normative framework on gender parity

THREATS

- Rigid and bureaucratic tax framework
- Imbalance between professional training and opportunities for women's professional development
- Perpetuation of the patriarchal culture by some segments of women
- A pyramidal organization of institutions and work space prevails, to the detriment of women
- Hermeticism and institutional rigidity that do not favor the gender perspective
- The job insecurity of women in the CCI requires them to have a supportive family social structure

The reality of women's participation in the CCI is similar to that observed in professional groups, but includes a number of additional, unique challenges. In short, women face increased economic and labor precariousness, and their participation is reduced when they seek to access higher positions in cultural management, public service, and companies, as remarked at the round-table discussion.

Similarly, the gap in the rate of economic participation between men and women persists, despite the fact that the proportion of professional women in the CCI and academic women is higher than that of men, as shown by the analysis of total employed personnel (TEP). Meanwhile, a deep-rooted patriarchal culture is one of the main threats, and one that is sometimes perpetuated by women themselves. In the same way, institutional hermeticism in the face of dialogues and reflections from a gender perspective remains a threat for women who work in the CCI, and for society in general. But this complex and multi-disadvantaged environment also raises some opportunities, mainly with the arrival of generations with a greater awareness of the transformative power of women, and of art as a way of life that can reverse esthetic violence against women.

One other promising area of opportunity involves leveraging the capacity of educational spaces to promote pluralism and diversity, which may help begin to counteract gender asymmetries. Nonetheless, to achieve this, it is necessary to promote skills and tools for women's autonomy, transforming institutions to level up access opportunities for women.

It is of crucial importance to generate data that helps to make visible the contributions of women to the economy and culture, as well as the inequity of the conditions faced by this segment of the population. Disseminating this information can be part of a process of raising awareness in society and among decision makers. This can lay the groundwork to design public policies that promote actions with gender perspectives to compensate for historical inequalities, through gender parity regulatory frameworks in public institutions and the private sector.

SWOT analysis of young creatives

STRENGTHS

- Plenty of academic institutions with CCI-related programs and a track record in the region
- Growing student population within CCI
- Recognized industries (gastronomy, music, wine, and craft beer)
- Outreach programs for the arts for all education levels, provided by NGOs and cultural collectives
- Cross-border links with independent institutions and projects
- Border multiculturalism
- New generations that are more collaborative, engaged, positive, technological, and global
- Use of digital media as collaborative platforms

OPPORTUNITIES


- Emerging sectors (podcasts, radio, dance, video games, and TV)
- Interdisciplinary vision that favors collaboration between industries
- Potential of digital media as democratizers of CCI
- Alignment of academic programs with the industry value chain
- Chaos of the city as a stimulus for creativity
- University mechanisms to promote CCI (incubators, competitions, and programs)
- The potential of the maquiladora industry as a space for artistic and cultural expressions
- Models and success stories in southern California as references
- Perception of Tijuana as a seedbed of talent

WEAKNESSES

- Inadequate promotion of the CCI from basic education to university
- Lack of management and business training for young creatives
- Inadequate alignment between educational programs and the value chain of the CCI
- Focus on talent over the rest of the production process
- The CCI in Tijuana lack planning, organization, funding enhancement, and professionalization
- Lack of unions or professional associations that provide support to young people
- Fear and refusal to formalize their business or activities

THREATS

- Utilitarian approach to economics vs humanistic approach
- Prominence of the maquiladora industry compared to value-added industries
- Sector dispersion due to size and diversity
- The conception of arts as a hobby, and not as an economic and professional activity
- The dichotomous conception of the artist (star vs. failure)
- Limited government resources and lengthy bureaucratic processes
- Budget cuts
- Public and private organizations seek to incorporate young creatives into their activities, but for free
- Impact of the pandemic on social skills



In the case of youth participation in the CCI in Tijuana, the relationship between academia and industry has been critical in establishing the current conditions. In this regard, participants observe a gap between the academic programs of the universities and the different links of the value chain of the industry. This explains the focus of the academic programs on the development of creative talent, leaving aside training in highly relevant areas such as administration and business. This, in turn, makes it difficult for young creatives to visualize the economic potential of their professions, leading them to view CCI as informal activities that cannot provide a decent income without other complementary activities.

In addition to this lack of knowledge about the economic potential of CCI, the concerns of young people are fueled by a global economy that prioritizes a utilitarian over a cultural and humanistic approach, and this encourages young creatives to question the relevance of this type of profession. Likewise, the importance of the maquiladora industry in Tijuana relegates this type of higher value-added industry to a second plane.

On the other hand, another factor that makes it difficult for young people to join CCI is the size and diversity of the sector itself, which is made up of a wide range of industries, so the need for trade associations becomes urgent to provide support to students and young graduates. In the same way, budget cuts and limited access to resources are factors that work against young people and the entire creative economy. Nevertheless, young creatives in Tijuana also benefit from conditions that help cushion the impact of these challenges. For example, Tijuana has many academic institutions that offer programs related to CCI, which has led to a growing student population and the emergence of a new conscious, collaborative, cosmopolitan, and technological generation, which takes advantage of cross-border links with independent institutions or projects and looks to success stories in southern California as a reference. One example of this is craft beer, which came to Baja California on the back of a movement that began in San Diego. Emerging sectors identified include the production of podcasts, radio, dance, video games, and television. Finally, one factor that motivates young people to enter this economy is the chaos of the city, which they perceive as a stimulus for creativity and innovation, together with the perception of Tijuana as a melting pot of cultures and a seedbed of talent.

Conclusions

Between April and May 2022, around 200 companies or independent agents answered the instruments that were disseminated electronically. The results of all the surveys of creative professionals in Tijuana enabled us to identify prominent sectors based on their share of CCI. In first place are activities inherently associated with culture: performing arts and shows, and visual and plastic arts, at 18% each.

Audiovisual production is notable in second place, at 14%, and music production and promotion comes in third, as does marketing, both accounting for 8% of CCI. They are followed by digital creative services; graphic, digital or 3D design; and support services for CCI, all at 7%. Finally, a lower share of CCI is taken up by architecture at 5%, fashion at 4%, handicrafts at 3%, gastronomy and beverage production at 2%, and mechanical and electronic design at 2%.

Performing arts and shows	18%
Visual and plastic arts	18%
Audiovisual production	14%
Marketing	8%
Music production and promotion	8%
Digital creative services	7%
Graphic, digital or 3D design	7%
CCI support services	7%
Architecture	5%
Fashion	4%
Handicrafts	3%
Gastronomy and beverage production	2%
Mechanical and electronic design	2%





The challenge inherent to the study of CCI, which by definition are divided between several sectors of the economy, lies in covering the variety of branches or activities that they encompass. In this sense, it is considered that the sectors with the lowest participation respond to economic dynamics that are perceived in other areas of the economy – for instance, mechanical and electronic design responds to dynamics within industrial activities or the construction industry, although this study also identified architectural design services within the CCI. Specific studies have also been carried out on sectors such as gastronomy and beverage production; tourism promotion agencies and the restaurant industry have even created directories of services and establishments in the field. All this shows the dynamism of CCI-associated activities in Tijuana.

The cultural and creative industries contribute to the economic promotion of the area and generate value and production chains, and for this they need to synergize with the factors of production, including human capital. According to the Economic Census (INEGI, 2019), the creative industries account for 5.3% of the total gross production and 8.6% of the total employed personnel in Baja California, which translates into more than 89,000 jobs. They also generate 5.8% of the gross census value added, which represents more than 7.6 billion pesos per year and almost 3 billion pesos in remuneration.

These data do not consider the impact of the COVID-19 pandemic, since they were collected before the 2020 health emergency declaration. Given the size of the economic units we identified, with the majority being self-employed professionals, followed by small companies that offer services, it is necessary to support their growth, both because of the rich nature of the content that they offer and because of the potential for economic development. The COVID-19 mitigation strategies played out in different ways depending on the nature of the CCI. For example, the performing arts and shows, visual and plastic arts, and music promotion, as well as handicrafts and design and fashion sectors, traditionally depend on in-person events or activities to exhibit creations, and were heavily affected; other sectors were able to continue to operate more or less normally due to their strong reliance on digital technologies.

In the pandemic hiatus, traditional CCI devised ways to continue creating and remain in contact with their audiences, largely through technological mediation and by programming online events or designing applications to offer their services hand in hand with programmers and marketers. This field is therefore believed to offer enormous potential, by combining expanded advertising with live events.

Finally, the digital technology and intellectual property aspects, together with the added value provided by the CCI, must be considered in the strategies implemented by the sector to seek to connect with international markets. In this vein, the road map defined by ProMéxico (2013) urges the promotion of content with an outlet on the digital screen, such as cinematography, animation, audiovisual development, advertising, multimedia, electronic learning (e-learning), and video games. With this, digital creative services and support services will be able to shore up even further the development of cultural and creative industries.

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