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I hereby certify that this is the correct translation, in what corresponds to the documents that accompany it, submitted for translation from Spanish into English – Economic diagnosis of the cultural and creative sector.

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Seal and signature registered at Notaries 73 and 15 of Bogotá, as set forth in Article 6 of Resolution 1959, of August 3, 2020 issued by the Ministry of Foreign Affairs.

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How did the **economy of Bogotá's** cultural and creative sector perform?

# Economic diagnosis of the cultural and creative sector



**Results of the Cultural and Creative Economy Satellite Account (2014 - 2022)**

**SECRETARÍA DISTRITAL DE CULTURA,  
RECREACIÓN Y DEPORTE**

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**Corporativo**

**SATELLITE ACCOUNT OF CULTURE  
AND CREATIVE ECONOMY OF  
BOGOTA  
RESULTS 2014 – 2021**



Red Distrital  
para la Cultura  
y el Patrimonio Cultural



SECRETARÍA  
DE CULTURA,  
RECREACIÓN  
Y DEPORTE



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### Foreword

#### **Agents of the cultural sector as an engine of economic recovery and strengthening of the social network in Bogotá**

On September 27, 2023, the launching event for the results of the Cultural and Creative Economy Satellite Account was held in Bogotá, for the series 2014 to 2022. This event gave us the opportunity to understand the dynamics of the cultural and creative sectors in our city, and learn about their contribution and evolution over time.

The results allow us to highlight the relevance of empirical information in decision-making for our ecosystem, from the public sphere in the capital. These figures, not do they only allow us to identify sectors that have shown remarkable resilience and strength during difficult times, but also give us the ability to recognize those activities that, despite facing significant challenges, continue to move towards recovery and growth.

These data make it easier for us to focus institutional efforts, with the purpose of effectively addressing the particular needs of those who most need support in the public sector.

It is worth noting that in 2017 Bogotá became the first city in the world to have a continuous and reliable measurement system, which captures the economic contribution of culture and creativity at a subnational level.

Three years after a global pandemic broke out, we can say that our sector has an aggregate economic contribution that exceeds approximately 22% compared to 2019. In general, culture and creativity in Bogotá are no longer in the economic recovery phase. We can say with a high level of certainty that we are on the path towards a sustained economic growth and we celebrate the enormous capacity of culture and creativity to adapt, innovate, and grow in the face of adversity.

From the Board of Culture, Recreation, and Sports we are committed and will continue working for the strengthening and growth of the cultural and creative sector of Bogotá, working always hand in hand with agents and businessmen, of involved parties and strong public institutions; and the media that make visible and enhance this information, and of course, the academy.

***Secretary of Culture, Recreation, and Sports of Bogotá***  
***Catalina Valencia Tobón***

## 1. Executive Summary

The Cultural and Creative Economy Satellite Account of Bogotá (CSECCB) is an economic, continuous, reliable, and comparable information system, which allows knowing the behavior of the cultural and creative activities of the city, presenting its results annually, in terms of macroeconomic<sup>1</sup> aggregates, income, intermediate consumption, added value and employment<sup>2</sup>.

The value of production in both cultural and creative sectors of Bogotá for 2022pr was \$34.4 billion pesos (Approx. 8.09 billion dollars), intermediate consumption amounted to \$17.2 billion pesos (Approx. 4.05 billion dollars), a concept that has been characterized by representing on average (2014 - 2022) 49.2%\*\* of production. The total added value of the sector in Bogotá exceeded \$17.2 Billion pesos\*\*<sup>3</sup>in 2022pr

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<sup>1</sup>It is important to highlight that the results of the CSECCB do not allow the information to be disaggregated by locality, UPZ, Creative District, territorial or differential approach.

<sup>2</sup>Information on employment is presented in terms of employed people and full-time equivalent jobs in cultural and creative activities. The definition of these two concepts can be consulted in the glossary.

<sup>3</sup>\*\* (figures in current prices): corresponds to the value of the operations at prices at the time of registration, that is, it includes the inflationary effect. Taken from: <https://bit.ly/2MXCzae>.

(Approx. 4.04 trillion dollars<sup>4</sup>), a figure that represented 5.5%\*\* of the city's total added value and 61.8%\*\* compared to the national added value (excluding cultural tourism).

In 2022pr the number of people employed in cultural and creative economy activities in Bogotá was 201,909, representing 5.3% of the total employed in the city, and 28.9% of the total employed in this city. same sector at the national level. Compared to Full-Time Equivalent Work in the Culture and Creative Economy in Bogotá, in 2022,188,719 jobs were calculated, which represented a growth of 6.11% compared to 2021p.

Although the area of functional creations represents an important proportion in economic terms of the cultural and creative sector of Bogotá, standing out because of its ability to generate economic value and quality employment, the data evidenced in this study highlights the need to continue with the execution of actions that promote and solidify the entrepreneurial and business intentions of the most traditional subsectors of culture and creativity, such as arts, heritage, and cultural industries.

Consequently, it is important to highlight the relevance of actions carried out within the framework of the implementation of the District Public Policy of Cultural and Creative Economy, through which it seeks to achieve its specific objectives, which contribute to progressive improvement. of these macroeconomic aggregates, namely: i. adequate spaces for the development of cultural and creative activities, ii. strengthening of entrepreneurial and business capacities of agents, iii. financial support mechanisms, iv. expansion of markets and v. knowledge management.

Finally, it is important to keep in mind that this research contributes to the fulfillment of the Sustainable Development Goals (SDGs), since it strengthens the generation of information, the analysis of urban policies, the promotion of innovation and the training of professionals, thus contributing to informed decision-making, the design of sustainable urban solutions and the monitoring of progress towards goals of inclusion, security, resilience and sustainability in urban environments.

## **2. Methodology and economic activities**

Based on the review of different methodologies, guides, and manuals, the Cultural and Creative Economy Satellite Account harmonizes and adapts to the context of the city including procedures and technical definitions that allow obtaining a coherent and comparable economic measurement. The following documents are taken into account as study references:

- System of National Accounts (UN, 2008).
- Methodological manual for the implementation of Culture Satellite Accounts in Latin America (Andrés Bello Agreement, 2009).

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<sup>4</sup>Value calculated from the average TRM for 2022 (\$4,255). Source: Bank of the Republic of Colombia.

- GDP Bogotá DC methodology (DANE, 2014).
- Methodological Guide for the Implementation of Culture Satellite Accounts in Ibero-America (Andrés Bello Agreement, 2015).
- Departmental Accounts Methodology (DANE, 2016).
- Labor Market Methodology Large Integrated Household Survey.

For the labor market information, the Large Integrated Household Survey (GEIH) is used as a source; the GEIH 2018 Methodological Framework is taken into account, which includes modifications to the ICLS 17 (2003); ICLS 19(2013) and ICLS 20(2018); projections of the National Population and Housing Census (CNPV) 2018; sampling frame for 23 cities + inclusion of new departments of the Amazon, Orinoquía, San Andrés and Providencia region, as well as statistical information on prioritized population groups; peasant population, migrant population, LGBTI and population with disabilities at the Washington group scale.

As normative references, the CSECCB is framed in:

- Agreement 709 of 2018 of the Council of Bogotá: "By which guidelines are established for the promotion, promotion, incentive and development of the Orange Economy in the Capital District and other provisions are adopted." Article 5 "Raise, expand, adapt and update the information corresponding to the sectors included in the Orange Economy and its relevance in the economic and productive development of the city, through statistical measurements, analysis and studies, such as the Satellite Account of Culture Bogotá Chapter and Mapping of Cultural and Creative Industries, in order to systematize pertinent information for decision making."
- District Public Policy on Cultural and Creative Economy (PPDECC), approved through CONPES DC document No. 2 and published in district registry No. 6643 of September 26, 2019, whose objective is: "Generate an environment conducive to cultural and social development and economic of the city, through the promotion, promotion, incentive and development of the cultural and creative economy, within the framework of the recognition, respect and promotion of cultural rights and freedoms, and the Bogotá Cultural Agenda 2038", in its fifth objective related to knowledge management.

Thematic delimitation of economic activities for the cultural and creative sector:

For the development of this research, the four-digit coding of the International Standard Industrial Classification (ISIC) of the United Nations is used.<sup>5</sup>, in version 4,

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<sup>5</sup>The International Standard Industrial Classification (ISIC) provides: "a general framework within which economic data can be collected and disseminated in a format designed for the purposes of economic analysis, decision-making and policy development. The classification structure is a standard format that allows detailed information about the situation of an economy to be organized in accordance with economic principles and perceptions. (UN, 2009, p.3).

adapted for Colombia by the National Administrative Department of Statistics (DANE), with the following considerations:

- As in the national case, there is no information available for data processing, hosting and related activities (ISIC 6311), because these are carried out by non-resident agents.
- The measurement for Bogotá does not include information regarding the executive activities of the public administration (CIIU 8412), taking into account that official entities are classified as regulating the activities of organizations that provide health, educational, cultural and other social services, except social security services (ISIC 8413).
- The measurement for Bogotá does not include partial inclusion activities related to cultural tourism, nor the source of microbusiness information for Bogotá, due to the lack of robust and reliable technical coefficients for these calculations.

The CSECCB is structured and presents statistical information for three (3) areas made up of 13 sectors that, in turn, group 34 economic activities characteristic of the sector, which are total inclusion<sup>6</sup>for measurement and 51 related economic activities, which are partial inclusion<sup>7</sup>. This segmentation is in harmony with the proposal of the National Government of Colombia, with the purpose of allowing comparisons to be made. In this sense, for Bogotá the calculations are made for 85<sup>8</sup>of the 103 activities defined as Cultural and Creative.

*Within the Arts and Heritage area*, there are the sectors of: visual arts; performing arts and shows; cultural heritage; education in arts, culture and creative economy; manufacturing activities of the creative economy (handicrafts); associative and regulatory activities. In the area of Cultural Industries, there are the sectors: publishing; phonographic; audiovisual; news agencies and other information services. Within the Functional Creations area, there are the sectors: new media and software, digital media and content software, design and advertising.

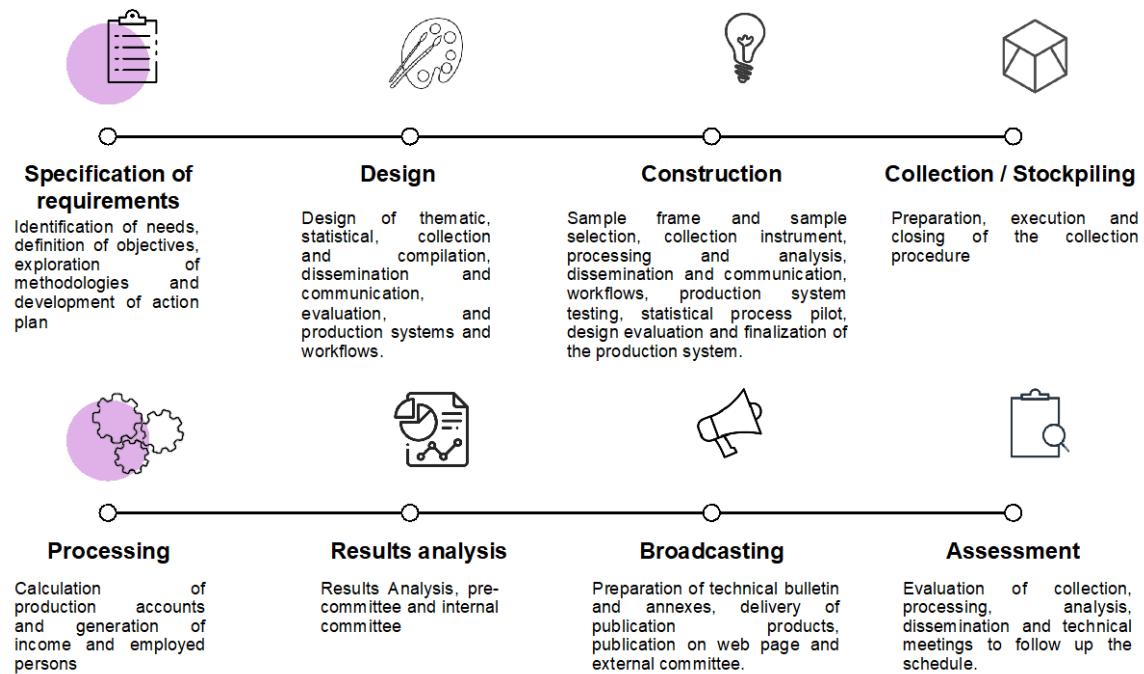
The implementation of the CSECCB is carried out within the framework of the inter-administrative technical cooperation agreement 193 of 2017 between the District Secretariat of Culture, Recreation and Sports (SCRD) and the National Administrative Department of Statistics (DANE). Therefore, the CSECCB issues official figures that

<sup>6</sup>Total inclusion activities: Total inclusion activities refer to economic activities belonging to the selected classes of ISIC Rev. 4 AC, which are considered economic activities of a cultural nature, and those creative activities in which all their products are protected by copyright (taken from General Methodology Satellite Account of Orange Culture and Economy, DANE 2021).

<sup>7</sup>Partial inclusion activities: Partial inclusion activities are those creative economic activities in which only some of their products are covered by copyright (taken from the General Methodology of the Orange Culture and Economy Satellite Account, DANE 2021).

<sup>8</sup>Activities that cannot be disaggregated at the district level are excluded, such as those related to the tourism sector, streaming and executive activities of the public administration.

comply with the Generic Statistical Business Process Model (GSBPM):



### 3. International scenario

In order to contextualize the behavior of Bogotá's cultural and creative economy, it is important to review some international cases that show how the sector is perceived in terms of economic growth, employability, governance and trade in cultural goods and services.

It is relevant to mention that UNESCO in its 2022 World Report<sup>9</sup>, presents culture as a global public good and estimates that the cultural sector represents 3.1% of GDP worldwide and 6.2% of total employment.

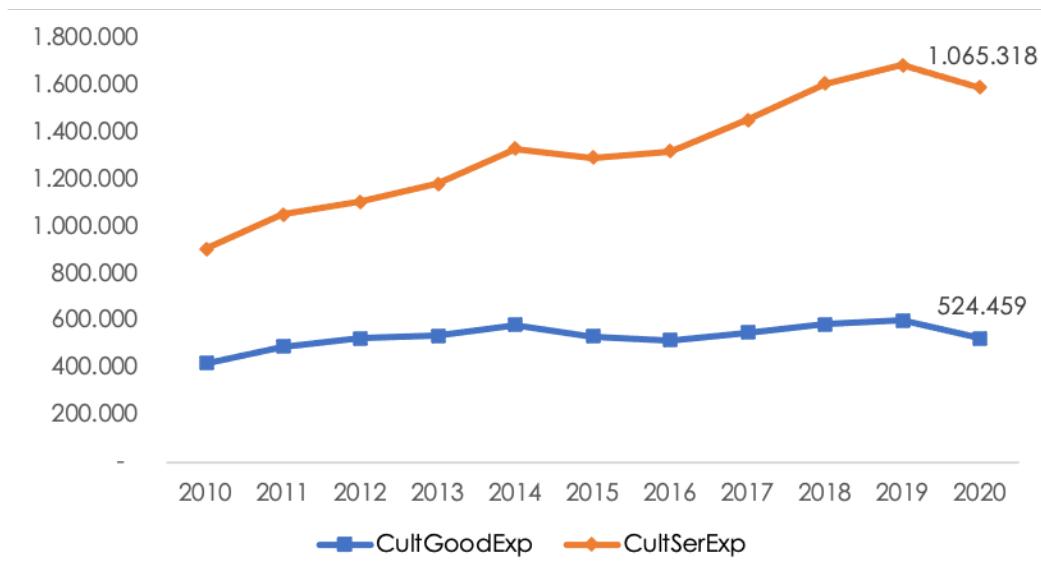
Likewise, according to data from the statistics portal of the United Nations Conference on Trade and Development (UNCTAD, 2021), exports of cultural goods<sup>10</sup>For 2020 they were more than 524 million dollars and services were a little more than 1 billion dollars. According to UNCTAD, the growing difference between the export of these two products (between goods and services) is due, on the one hand, to the dematerialization of cultural goods, where it is increasingly common to find cultural products in digital media. and on the other hand, to the consequence of the great progress that services have had in measuring the activities that frame them.

#### Value of exports of cultural goods and services worldwide 2010 - 2020.

<sup>9</sup>Rethink policies for creativity, propose culture as a global good UNESCO 2022

<sup>10</sup>Source information taken from:

[https://unctadstat.unctad.org/datacentre/dataviewer/US.CreativeGoodsValue\\_E](https://unctadstat.unctad.org/datacentre/dataviewer/US.CreativeGoodsValue_E)



Source: UNCTAD. Elaboration. Own. Millions of USD at current prices.

On the other hand, in the latest available DANE publication (VIII Cultural and Creative Economy Report 2022, p. 57)<sup>11</sup>, it can be seen that in Colombia,

"Between January and August 2022, the country's external sales corresponding to goods related to the activities of the Cultural and Creative Industries (partial and total inclusion) were US\$84,414.7 thousand FOB dollars and showed an increase of 18.8% in relation to the same period in 2021. Arts and Heritage presented the highest growth with 29.0%, followed by Cultural Industries with 18.1% and Functional Creations with 16.6% in relation to the same period from 2019, goods related to activities in the Cultural and Creative Industries presented an increase of 1.2%. Functional Creations presented the largest increase with 21.4%, followed by Arts and Heritage with 13.0%; For its part, Cultural Industries had a decrease of 26.0%."

Likewise, in relation to Bogotá's participation in exports by area of the cultural and creative economy, in this VIII Report, DANE presents that: "Between January and August 2022, exports originating from Bogotá DC referring to the Arts and Heritage, increased 62.0% compared to the same period in 2021", "Between January and August 2022 compared to the same period in 2021, the increase in exports originating from Bogotá DC and Cundinamarca from the Cultural Industries area together contributed 13.7 percentage points to the total variation of exports for said area (17.9%)" and for the Functional Creations area "the exports originating from Bogotá DC were US\$2,646 thousand dollars FOB, increasing 256.8% compared to the same period of 2021."

<sup>11</sup>[https://dane.gov.co/files/investigaciones/pib/sateli\\_cultura/economia-orange/8vo-reporto-economia-cultural-creativa.pdf](https://dane.gov.co/files/investigaciones/pib/sateli_cultura/economia-orange/8vo-reporto-economia-cultural-creativa.pdf)

Among the main challenges that UNCTAD poses for the growth and development of the sector is the unification of concepts on the definition and scope of culture and creativity at a global and institutional level, and the standardization of methodologies and criteria for measuring the main contributions of culture to the economy of countries; the above, in order to have reliable and comparable statistics between countries. These challenges are also the main goals of the research report Measuring the cultural and creative sectors EU<sup>12</sup>. Among others, for this reason, the CSECCB is relevant and becomes an important instrument and input for making optimal decisions in the city and in the country.

On the other hand, among the sources of information of the European Union (EU), there is the European Statistical Office of the European Commission (Eurostat), an entity that measures different variables and economic aggregates for all sectors of the economy, including the cultural sector, for member countries.

According to the Eurostat statistics portal<sup>13</sup>, in the EU by 2022 there were 8.1 million people employed in the cultural sector, of which 49.22% are women and 50.78% men.

### **Employment in the cultural sector in the European Union by 2022 by sex<sup>14</sup>.**

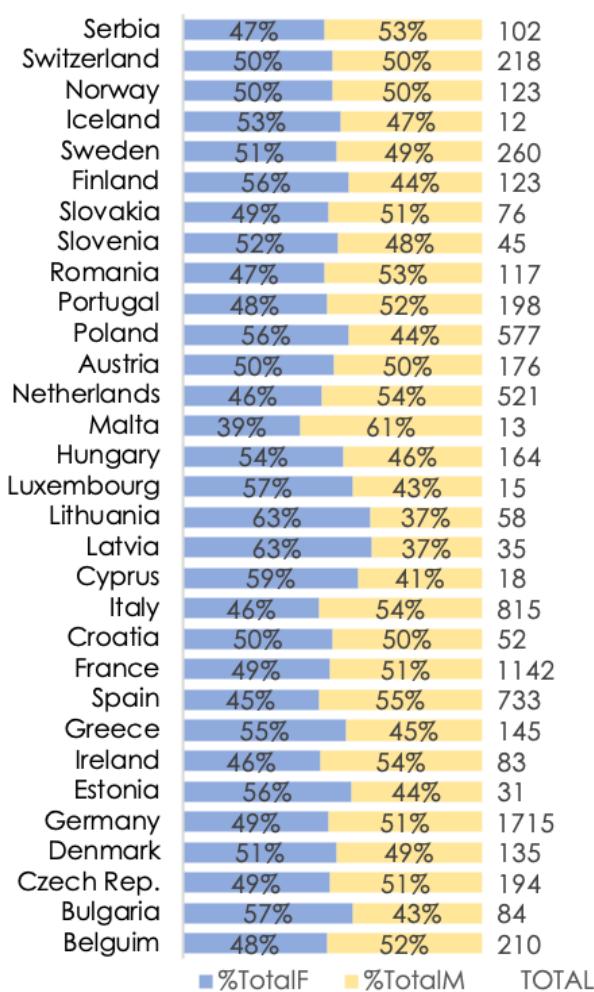


<sup>12</sup>Measuring the cultural and creative sectors EU. European Comission

<sup>13</sup>EU employment figures:

[https://ec.europa.eu/eurostat/databrowser/view/CULT\\_EMP\\_N2/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/CULT_EMP_N2/default/table?lang=en)

<sup>14</sup>There is no information for the United Kingdom, Montenegro, North Macedonia and Turkey.



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Source: Eurostat. Own preparation. Number in thousands.

The graph shows that Germany and France are the countries with the largest number of employees in the cultural sector, with 1.7 million and 1.1 million, respectively. There are other countries such as Italy, Spain, Poland, and Holland that are located in the range between 900 and 500 thousand people employed in this sector. It is important to mention that most of the aforementioned countries have more than 35 million inhabitants, only Holland has approximately 17 million inhabitants. Likewise, it can be seen that in these territories the percentage of women working in the cultural and creative sector exceeds 39%, among which Lithuania and Latvia stand out, where 64% of the total employed in the sector are women.

In the European Union, 13 countries have a population below 8 million people, including: Denmark, Finland, Ireland, Croatia, Luxembourg, where the population employed in the sector is between 50 thousand and 150 thousand.

In the case of Colombia, the cultural and creative sector reported 697,967 employed people in 2022, according to the National Cultural and Creative Economy Satellite Account (this research does not present data on employed persons disaggregated by sex). In the case of Bogotá, when making a comparison of the results of those

employed in the cultural sector provided by the CSECCB, it is evident that the city is far above, not only the aforementioned countries that have a general population similar to the of the city, but of those like Greece (10 million), Hungary (9.5 million) and Romania (19 million), which have a population greater than 9 million but have a lower number of employees in the sector than that presented by Bogotá by 2022. It can even be said that the city is approaching the number of employees in culture of countries such as Austria, the Czech Republic and Portugal.

Regarding employment by gender, by 2022, when comparing the sex of those employed in the cultural and creative sector in Bogotá, compared to the results of the member countries of the European Union, it is evident that on average 51% of women are employed and 49% are men employed in the sector, which reveals an equitable proportion by sex and becomes a reference point to be reached from the Capital District of Colombia, through the different plans, programs and policies.

Regarding the number of companies in the cultural sector in EU member countries between 2019 and 2020; In general terms, it can be observed that before and after the COVID19 pandemic, the number of companies in the sector in the EU<sup>15</sup> did not present a significant change. However, among the countries with the largest number of companies in the sector, Germany was the country where this variation was negative, reaching 8.9%, which represented a reduction of 11,695 companies, going from 131,035 thousand to 119,340. For 2020, the Netherlands showed a growth of 5.9% in the number of companies in the sector, going from 106,887 to 113,180. This same behavior was presented by Italy and France with a growth of 2.5% and 1.9% respectively. For its part, Bogotá went from approx. 23,500 companies in 2019, 20,400 companies in 2020, 21,400 companies in 2021 to 27,700 in 2022, related to cultural and creative activities.<sup>16</sup>

#### 4. National and district overview

According to figures from the National Administrative Department of Statistics<sup>17</sup>, between 2021 and 2022, Bogotá's GDP grew by 9.5%\*, a figure that exceeds the levels achieved in the country by 2.2 percentage points (pp)<sup>18</sup>(7.3%\*). In addition, the city's economy grew 13.7%\* compared to pre-pandemic levels (2019), that is, 3.3 pp more than the national total (10.4%\*). Regarding GDP per inhabitant, the country reported \$28.3 million pesos in 2022; For its part, the city registered \$45.4 million pesos, that is, 60.3%\*\* higher than the nation.

<sup>15</sup>Company figures from the EU sector:

[https://ec.europa.eu/eurostat/databrowser/view/CULT\\_ENT\\_NUM/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/CULT_ENT_NUM/default/table?lang=en)

<sup>16</sup>Source: Webservice Chamber of Commerce of Bogotá.

<sup>17</sup>Information updated on May 30, 2023. Source DANE, Base 2015:

<https://www.dane.gov.co/index.php/estadisticas-por-tema/cuentas-nacionales/cuentas-nacionales-departamentales#:~:text=For%202022pr%2C%20the%20GDP,%20million%20of%20pesos%2C%20respectively.>

<sup>18</sup>Including Bogotá

The added value<sup>19</sup> of the city grew 9.4%\* compared to 2021 and 13.7%\* compared to 2019. When analyzing the behavior by activity, it is evident that between 2021 and 2022, the twelve major branches of economic activities<sup>20</sup> grew, particularly the growth of construction activities (34.4%\*), mining and quarrying (33.1%\*) and artistic, entertainment and recreation activities and others stands out.<sup>21</sup>(30.7%\*).

Concerning of participation, activities with the greatest contribution of added value in the city of Bogotá were wholesale and retail trade; repair of motor vehicles and motorcycles; transportation and storage; accommodation and food services (21.8%\*\*), public administration and defense; mandatory social security plans; education; human health care and social services activities (13.9%\*\*), real estate activities (11.3%\*\*). For its part, the artistic, entertainment and recreation and other activities sector contributed 5.7%\*\* of added value compared to the total of the 12 economic activities.

The concentration of added value of the branch of artistic, entertainment and recreation activities and others in 2022 at national level is focused on Bogotá (41.5%\*\*), followed by departments (provinces) such as Antioquia (14.6%\*\*) and Valle del Cauca (9.4%\*\*). The highest growth rate for this branch was reported by Antioquia with 50.08%\*.

In terms of inflation<sup>22</sup>, the year 2022 was characterized by its high price levels (13.12%\*\*), compared to 2021 (5.62%\*\*) and pre-pandemic years 2019 (3.58%\*\*), which affects in a generalized way the trade of goods and services, debt costs, investment, planning and savings decisions, as well as the distribution of wealth. In this sense, inflation also exerts its influence on the cultural and creative sector, in a way that reflects both its challenges and its singularities.

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<sup>19</sup>figures before taxes.

<sup>20</sup>Agriculture, livestock, hunting, forestry and fishing; (2) Exploitation of mines and quarries; (3) Manufacturing industries; (4) Supply of electricity, gas, steam and air conditioning; water distribution; wastewater evacuation and treatment, waste management and environmental sanitation activities; (5) Construction; (6) Wholesale and retail trade; repair of motor vehicles and motorcycles; Transportation and storage; Accommodation and food services (7) Information and communications; (8) Financial and insurance activities; (9) Real estate activities; (10) Professional, scientific and technical activities; Administrative and support services activities, (11) Public administration and defense; mandatory social security plans; Education; Human health care and social service activities, (12) Artistic, entertainment and recreational activities and other service activities; Activities of individual households as employers; undifferentiated activities of individual households as producers of goods and services for their own use.

<sup>21</sup>Artistic, entertainment and recreational activities and other service activities; Activities of individual households as employers; undifferentiated activities of individual households as producers of goods and services for their own use.

<sup>22</sup>figures in current year, updated on August 8, 2023 DANE:

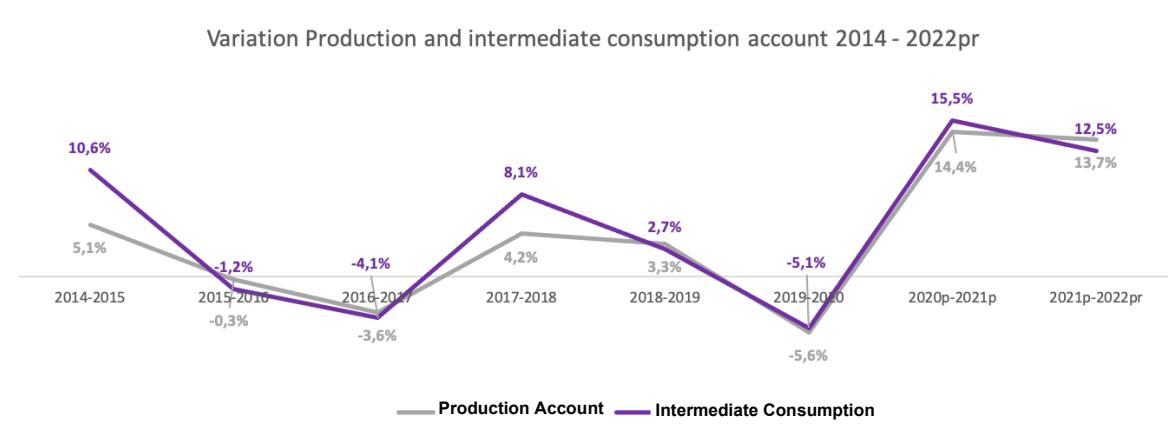
<https://www.dane.gov.co/index.php/estadisticas-por-tema/precios-y-costos/indice-de-precios-al-consumo-ipc/technical-information>

This economic force can generate scenarios in which access to cultural and entertainment experiences is restricted by rising prices, thus making it difficult for the public to appreciate and participate in artistic production. Additionally, the creative process itself may face obstacles due to higher production costs, requiring greater innovation and resource productivity.

##### **5. Results of the CSECCB in terms of Income, Intermediate Consumption and Added Value for the 2014 - 2022pr series<sup>23</sup>**

Below are the results of the CSECCB for the 2014 to 2022pr series. It is important to mention that the analysis is carried out based on the 85 ISIC Rev 4 AC class economic activities defined as part of the Cultural and Creative sector for Bogotá. Topics such as income and intermediate consumption, added value, and some contextual data will be addressed.

###### ***Production and intermediate consumption account***



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

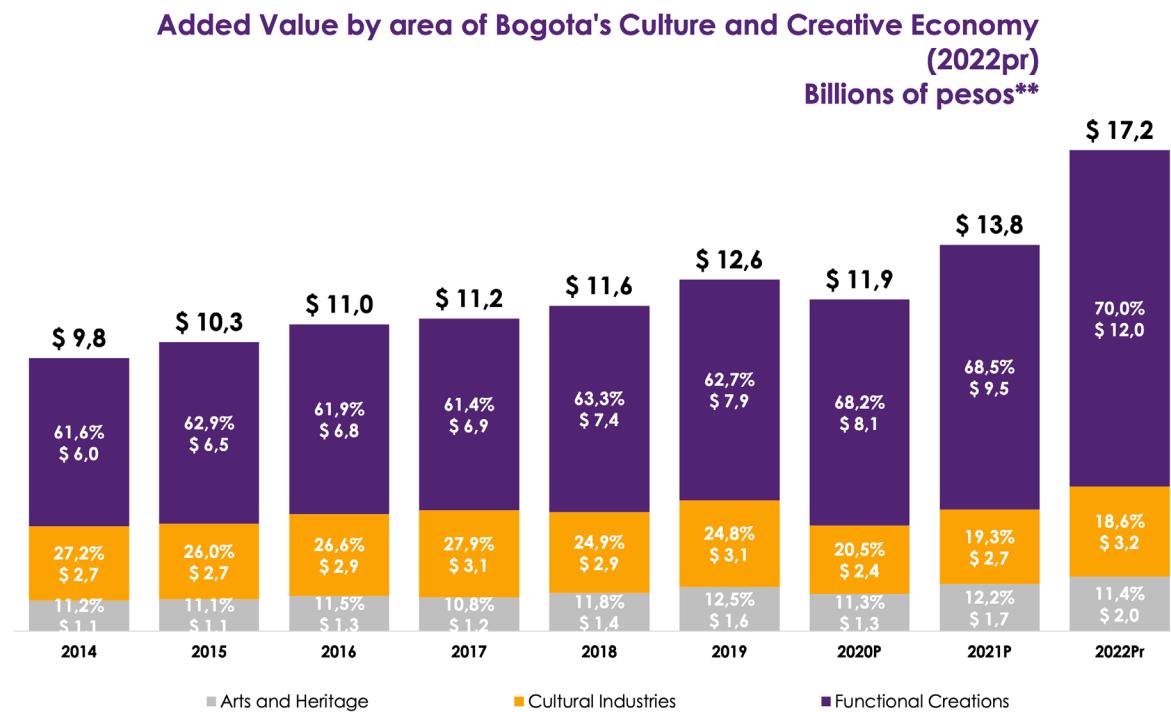
The production income of Bogotá's cultural and creative sector for 2022pr was \$34.4 billion pesos (approx. 8.09 billion dollars), and intermediate consumption was \$17.2 billion pesos (approx. 4.05 billion dollars), representing on average (2014 - 2022) 49.2%\*\* of total production.

For the years 2017 and 2018, an increase of 8.1%\* in intermediate consumption is evident, being above the growth in production (4.2%\*), however in this period income exceeds it by more than 48%, which offsets the increase in production costs. On the

<sup>23</sup>Pr (Preliminary): "Relates to progress with the information available and compiled, in a summarized manner from the Departmental Accounts system"

other hand, between 2020p and 2021p<sup>24</sup> Production grew 13.7%\*, a rate that is above the growth of intermediate consumption (12.5%\*).

### **Value added**



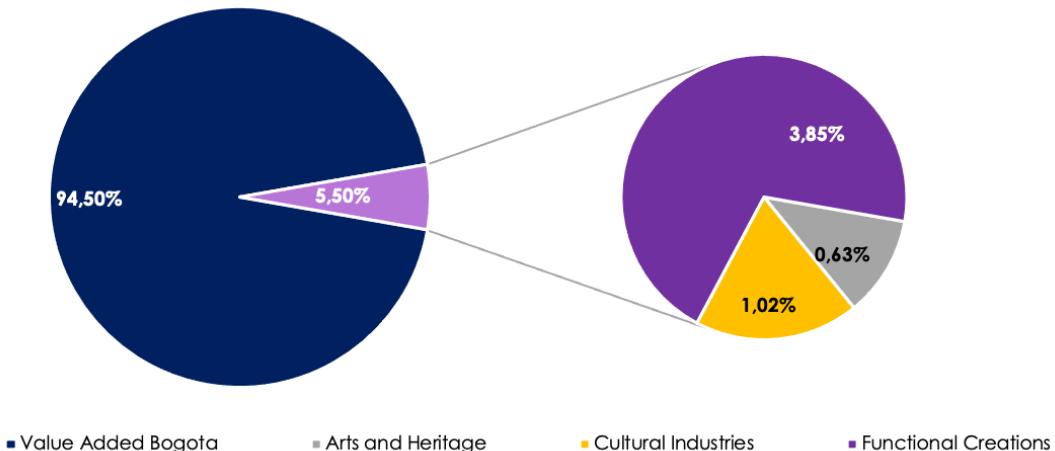
Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

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<sup>24</sup>Provisional data (p): "Corresponds to data that preserves the methodology and statistical collection, for reference year n, based on the information available on the date scheduled for publication; "These data can be modified to become definitive."

**Participation of the added value of the Cultural and Creative Economy by area in the total economy of Bogotá 2022pr**



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

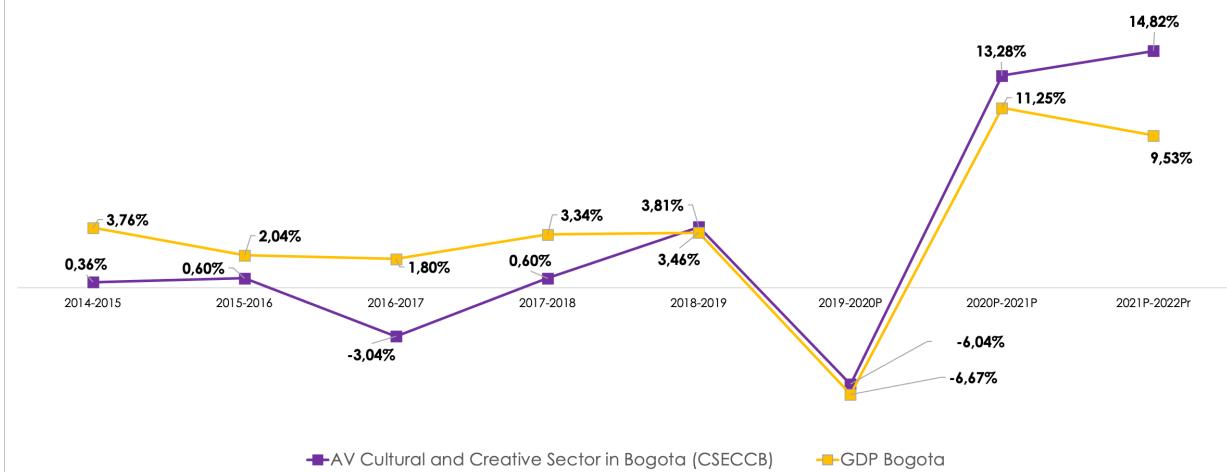
The added value of the cultural and creative economy exceeded \$17.2 Billion pesos<sup>\*\*25</sup> in 2022pr (approximately 4.04 trillion dollars<sup>26</sup>), a figure that represented 5.5%\*\* of the city's total added value and 61.8%\*\* compared to the national added value (excluding cultural tourism). Compared to the Gross Domestic Product (GDP) of the city, it represented 4.8%\*\*. It is relevant to mention that the economic contribution of culture and creativity is above the contribution of the construction sector for 2022pr, which in terms of added value was 3.9%\*\* (\$12.3 Billion pesos; approx. 2 .88 billion dollars) and the information and communications sector, which contributed 4.8%\*\* (\$15.1 billion pesos; approximately 3.56 billion dollars). On the other hand, sectors such as finance and insurance contributed 9.2%\*\* of added value for the same period (\$28.7 billion pesos; approximately 6.75 billion dollars).

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<sup>25\*\*</sup> (figures in current prices): corresponds to the value of the operations at prices at the time of registration, that is, it includes the inflationary effect. Taken from: <https://bit.ly/2MXCzae>.

<sup>26</sup>Value calculated from the average TRM for 2022 (\$4,255). Source: Bank of the Republic of Colombia.

### Variation of the Added Value of the Cultural and Creative Economy in Bogotá and total GDP of Bogotá 2014-2022Pr



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In terms of variation, the added value of cultural and creative activities grew 14.8%\*<sup>27</sup> between 2021p and 2022pr, a figure that exceeds the GDP growth rate of Bogotá (9.5%\*).

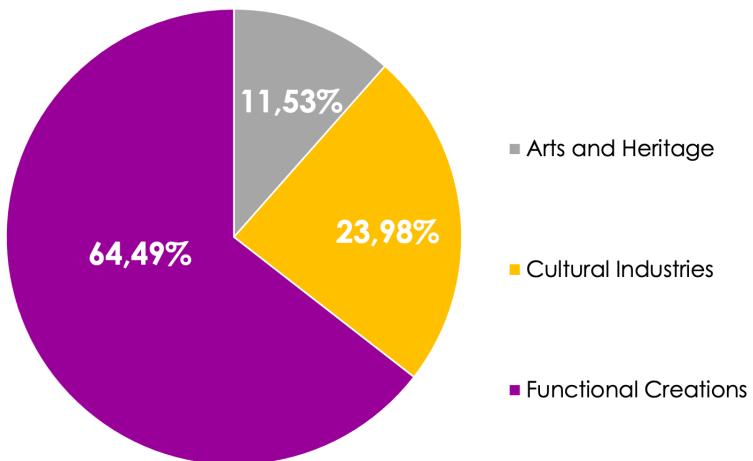
On the other hand, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), a recovery of the cultural and creative sector is evident by 22.2%\*, a figure that exceeds the GDP growth rate for 5.3 percentage points. the same period of analysis (13.7%\*). For these years, growth is also evident for information and communications activities (27.5%\*) and the financial and insurance sector (14.6%\*), however sectors such as construction decreased by 5, 6%\*.

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<sup>27\*</sup> Constant prices: it is the value of operations at a price that has been chosen as a base and therefore does not contain an inflationary effect. Taken from: <https://bit.ly/2MXCzae>.

**Composition by area  
Participation Average Value Added\*\*  
2014 - 2022pr**

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Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

Regarding the average participation of the added value between 2014 and 2022pr, the area of the Cultural and Creative Economy of Bogotá with the greatest participation was Functional Creations with a contribution of 64.4%\*\*, which reached its highest participation, with 70.0%\*\*.



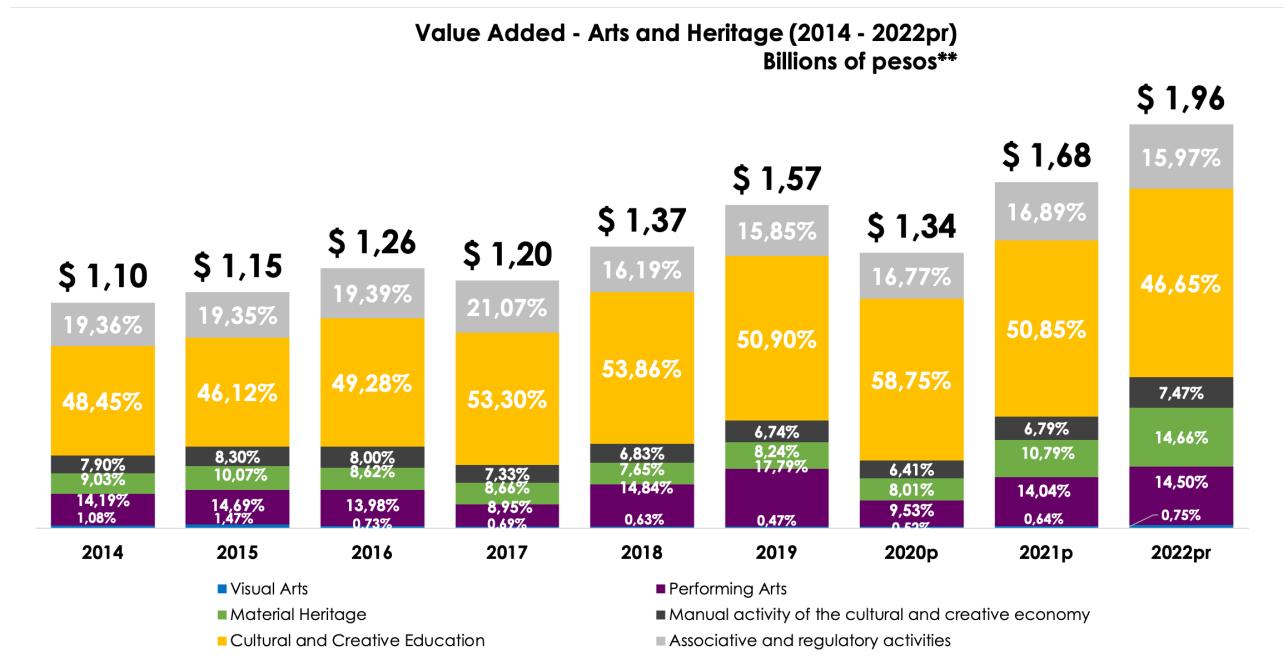
As of the type of inclusion, participation of the added value of total inclusion activities (69.0%) compared to partial inclusion activities (31.0%) stands out for the year 2022pr. For the year in question, total inclusion activities concentrate \$11.8 Billion (approximately 2.78 billion dollars) of the Added Value of the CSECCB, while inclusion activities group together \$5.3 Billion (approximately 3.56 billion dollars). Dollars).

Between 2014 and 2022pr, the participation of total inclusion activities stands out with an average participation of 66.7% and partial inclusion activities with an average participation of 33.3%.

According to information available in the webservice of the Bogotá Chamber of Commerce (CCB) on companies or societies with active and canceled registrations, it is evident that by 2022<sup>28</sup> There were a total of 27,799 companies that belong to one of the 34 total inclusion activities of the cultural and creative sector of Bogotá, of which 3,230 were new or created companies and 24,569 renewed companies. On the other hand, the canceled companies<sup>29</sup> There were 915 for the year in question.

## **Arts and Heritage**

### **Results by area**



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

The income obtained by the Arts and Heritage area went from \$2.02 Billion pesos\*\* in 2014 to \$3.29 Billion pesos\*\* in 2022pr (approximately 773.65 million dollars), highlighting the growth between 2014 and 2022pr of 19.48% and 11.27%, between 2021p and 2022pr. When the income figures for the Arts and Heritage area are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that there was a 17.98% growth in production.

Regarding the costs associated with the operation in the area of Arts and Heritage, it is highlighted that these went from \$931 billion pesos\*\* in 2014 to \$1.33 billion pesos\*\* in 2022pr (approximately 312.78 million pesos\*\* dollars), the growth between 2014 and 2022pr of 4.76% and 15.30%, between 2021p and 2022pr, stands out. When the intermediate consumption figures for the Arts and Heritage area are

<sup>28</sup>Cut to December 2022

<sup>29</sup>Companies with canceled registration and year of cancellation 2022

compared between 2019 (pre-pandemic) and 2022 (post-pandemic), it is evident that there was a growth of 14.65% in this concept.

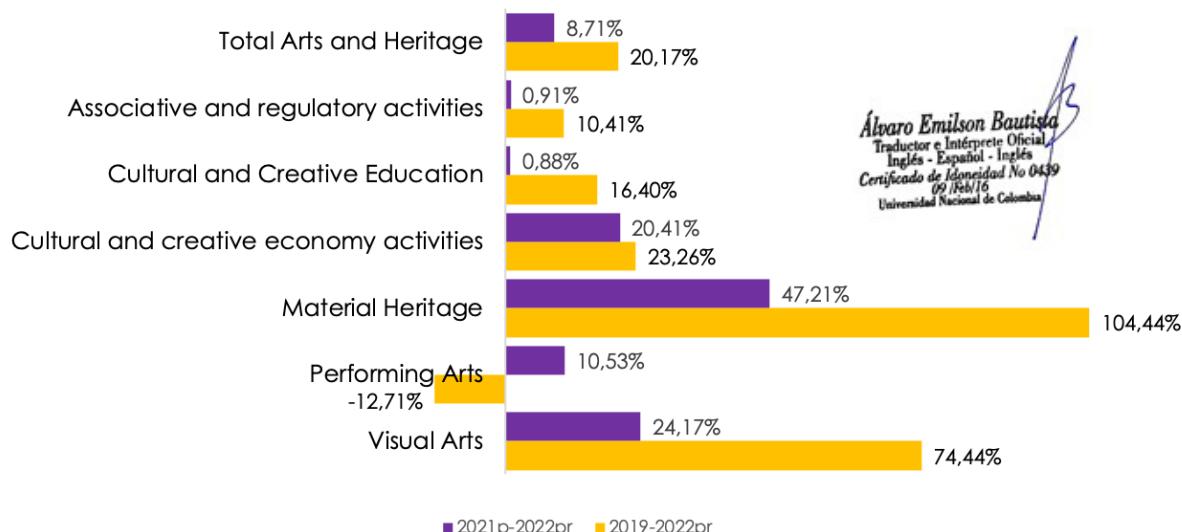
The added value of the Arts and Heritage area exceeded \$1.96 Billion pesos\*\* in 2022 (Approx. 460.87 million dollars), a figure that represents 11.40%\*\* of the total added value of the Economy cultural and creative of Bogotá.

In terms of variation, between 2021p and 2022pr the Arts and Heritage area had a growth of 8.71%\*. The growth of the measured series (2014 and 2022pr) of 31.54% stands out and, when the figures for 2019 (pre-pandemic) and 2022pr (post-pandemic) are compared, it is evident that there was a growth of 20.17% of value added.

### Results by sector and activity

For 2022pr, the sectors with the highest participation of added value in the area of Arts and Heritage were cultural and creative education (46.65%\*\*), with a contribution of \$915 billion pesos (approximately 215.01 million dollars); associative and regulatory activities (15.97%\*\*) with \$313 billion pesos (approximately 73.60 million dollars); Equity (14.66%\*\*) with 287 billion pesos (approximately 67.54 million dollars); performing arts and shows (14.50%\*\*) with \$284 billion pesos (approximately 66.82 million dollars); manufacturing activities of the cultural and creative economy (7.47%\*\*) with \$146 billion pesos (approximately 34.43 million dollars); and the visual arts (0.75%\*\*), with \$14 billion pesos (approximately 3.44 million dollars).

**Variation in value added by segment of the Arts and Heritage Area 2019-2022pr and 2021p-2022pr**



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In terms of variations, between 2021p and 2022pr the sectors with the greatest growth were activities focused on wealth (47.21%\*); visual arts (24.17%\*); manufacturing activities of cultural and creative economy (20.41%\*); performing arts and shows (10.53%\*); associative and regulatory activities (0.91%\*) and cultural and creative education activities (0.88%\*). When analyzing the behavior of the sectors between

2014 and 2022, it stands out that heritage activities presented the highest growth with 112.83%\*; Likewise, this sector presented the highest growth in added value, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic) with 104.44%\*.

When reviewing the participation and variation of the segments in the added value of Arts and Heritage, it is evident that the 8.71% growth that the area presented is mainly due to the positive behavior between 2021p and 2022pr, of the heritage sectors (47.21%\*) and visual arts (24.17%), given that they weigh 14.66%\*\* and 0.75%\*\*, respectively.

- By 2022, the added value of the Visual Arts sector will exceed \$14 billion pesos\*\* (approximately \$3.44 million). This sector is mainly made up of visual arts activities with a weight of 77.27%\*\* and photography activities (22.73%). In general, the Visual Arts activities present, throughout the series, better growth compared to the photographic ones; Thus, between 2014 and 2022pr there was a growth of 57.61%\*, the same as in the last year (between 2021p and 2022pr) with 29.70%\* and buying the year 2019 (pre-pandemic) and 2022pr (post pandemic), it is evident that it had a growth of 84.86%\* in the added value.

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### Context data:

In the field of photography in Bogotá, several opportunities and programs stand out that encourage creativity and visual expression. The call made in 2022 "Photography Award - Looking at the Center"<sup>30</sup> sought to stimulate the creativity of the inhabitants of Bogotá, encouraging them to explore and capture the cultural identity of the city center. This contest offered twenty individual incentives, each worth two million eight hundred thousand pesos M/cte (\$2,800,000), adding up to a total of fifty-six million pesos M/cte (\$56,000,000) in incentives for the winners. In addition, the "Hands to Work Photography Award Reflections of a Self-Built City - 2022"<sup>31</sup> It focused on making visible and reflecting on the processes of self-construction in the city through a series of fifteen (15) photographs. This program granted three incentives and also had a total of 38 million pesos (\$38,000,000).

Regarding the visual and plastic arts, the "Open Museum of Bogotá"<sup>32</sup> carried out a project in December 2022 that involved the participation of 70 artists and provided incentives of more than 700 million pesos for its execution. In 2021, this project also intervened in 11 areas.

Finally, the District Institute of the Arts – Idartes<sup>33</sup> allocated more than \$4.4 billion pesos and offered more than 300 individual incentives through 92 calls to support various agents of the city's artistic and cultural ecosystem in 2022. In a more general context, it is highlighted that the resources awarded to agents involved in the area of cultural heritage they experienced a notable increase, both in the number of proposals (78%) and in the amount allocated (47%) according to information from SICON - SCRD.<sup>34</sup>

- By 2022, the performing arts and entertainment sector will exceed \$284 billion pesos\*\* (approximately \$66.82 million). This sector is mainly made up of the activities of live musical shows with a weight of 73.12%\*\*; theatrical activities (16.28%\*\*); Other live entertainment activities (8.00\*\*) and theatrical creation (2.59%\*\*). When the behavior of the activities that make up the Performing Arts and Entertainment sector is analyzed, it stands out that between 2014 and 2022 the greatest growth was achieved by the activity of Live Musical Performance Activities with 26.27%. Between 2021p and 2022pr, Theatrical Creation activity with 89.54%\* presented the greatest growth; and it is noteworthy that, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that this activity showed growth of 126.84%\* in the added value.

<sup>30</sup>Source: <https://bogota.gov.co/servicios/oportunidades-y-apoyos/premio-fotografia-mirando-al-centro>

<sup>31</sup>Source: <https://sicon.scrd.gov.co/convocatorias/1778>

<sup>32</sup>Source: <https://www.idartes.gov.co/es/noticias/museo-abierto-de-bogota-logra-intervenir-14-zbp-de-la-ciudad>

<sup>33</sup>Source: <https://www.radionacional.co/cultura/convocatorias-de-idartes-para-artistas-2022>

Source: <https://www.idartes.gov.co/es/noticias/1434-millones-en-estimulos-para-las-artes-plasticas-y-visuales>

Source: <https://www.idartes.gov.co/es/convocatorias/estimulos/portafolio-2023/artes-plasticas>

<sup>34</sup>Source: [https://sicon.scrd.gov.co/datos-cifras?tipo\\_programa=99&tipo\\_grafica \[\]=5&anio=2022](https://sicon.scrd.gov.co/datos-cifras?tipo_programa=99&tipo_grafica []=5&anio=2022)

**Context data:**

The world of theater in Bogotá has remained active and vibrant during 2022, with various initiatives that have promoted both activities and theatrical creation in the city.

One of the outstanding proposals was the "Public Call for the District Concerted Rooms Program 2022,"<sup>35</sup> which aimed to strengthen theaters for the circulation of the performing arts of non-profit entities. In total, 38 awards were granted, with resources that reached the sum of \$1,829,000,000, thus supporting dramatic art in Bogotá.

The "XVII Ibero-American Theater Festival of Bogotá 2022"<sup>36</sup> It was another event of great relevance. This festival, considered one of the three most important performing arts festivals in the world, has established itself as the cultural heritage of Bogotá and Colombia. During its 2022 edition, 24 Colombian works were presented and more than 40 hours of learning were offered for actors, directors and all actors in the performing arts ecosystem. In addition, space was opened for businessmen, entrepreneurs, social leaders, institutions and students, thus demonstrating its scope and diversity.

The "Bogotá Theater and Circus Festival - 2022"<sup>37</sup> It also deployed its artistic programming throughout the city's 20 locations. With a total of 85 works that were presented in various theaters and unconventional spaces, such as market squares, schools, the Botanical Garden and the Bogotá Cinematheque, this festival demonstrated its commitment to bringing theater to every corner of the city. In addition, Bogotá facilities were added, such as the Idartes Mobile Stages and other iconic places, such as the La Media Torta Open Air Theater and the José Celestino Mutis Botanical Garden.

Finally, the significant investment and effort allocated to the theatrical reactivation in Bogotá stands out. Various theaters, such as the Teatro Mayor Julio Mario Santo Domingo and the National Theater,<sup>38</sup> They have scheduled a wide variety of functions and presentations throughout the year. These efforts have been supported by considerable investments, such as the almost \$8,000 million invested in the Teatro Mayor Julio Mario Santo Domingo and the \$6,000 million allocated to the reactivation of the National Theater. Even the Ditirambo Theater in Bogotá, after a period of recession, has invested more than \$50 million in its reactivation, with the goal of increasing its repertoire and attracting an estimated audience of between 15,000 to 17,000 spectators in 2022.

In summary, the year 2022 was a vibrant and dynamic period for theater in Bogotá, with a series of initiatives, festivals and projects that supported both theater creation and theater activities throughout the city. These efforts have contributed significantly to the cultural and artistic enrichment of Bogotá.

- By 2022, the Heritage sector will exceed \$287 billion pesos\*\* (approximately \$67.54 million). This sector is mainly made up of amusement park and theme

<sup>35</sup>SCRD Source: <https://sicon.scrd.gov.co/convocatorias/1585>

<sup>36</sup>Source: <https://bogota.gov.co/mi-ciudad/cultura-recreacion-y-deporte/en-2022-vuelta-el-festival-iberoamericano-de-teatro-de-bogota>

<sup>37</sup>Source: <https://www.culturarecreacionydeporte.gov.co/es/noticias/festival-de-teatro-y-circo-de-bogota-llegara-las-20-localidades>

<sup>38</sup>Source: <https://www.portafolio.co/tendencias/el-teatro-subio-su-telon-218-salas-con-reactivacion-al-100-561652>

park activities (40.69%\*\*); Research and experimental development activities in the field of natural sciences and engineering (24.44%\*\*); Library and archive activities (14.87%\*\*); Activities of botanical gardens, zoos and nature reserves (7.95%\*\*); Museum operation activities, conservation of historical buildings and sites (6.86%\*\*) and Research and experimental development in the field of social sciences and humanities (5.18%\*\*). When the behavior of the activities that make up the Heritage sector is analyzed, it stands out that between 2014 and 2022pr the greatest growth was obtained by the activity of Museum operating activities, conservation of buildings and historical sites with 368.45%\* and between 2021p and 2022pr the activity Activities of botanical gardens, zoos and nature reserves with 82.45%\*. On the other hand, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that Amusement Park and theme park activities were the ones that presented the greatest growth with 253.41%\*. It is important to mention the volatile arithmetic effect suffered by the results and variations of these activities, as they have the smallest number of companies in the sector in the city.

#### **Context data:**

In 2022, a significant increase in participation and interest in various cultural and recreational activities was observed in Bogotá, covering different sectors.

In the field of libraries and archives, access to these spaces increased significantly, with a 24% increase in visits to public libraries in the capital in 2022<sup>39</sup>. This increase not only translated into more people enjoying reading spaces, workshops, talks and exhibitions, but also boosted access to the digital public library. An important factor was the successful implementation of the Public Policy on Reading, Writing and Orality (La LEO), which had a significant investment of \$428,746,290,600, further strengthening the city's cultural and educational sector.

In the museum sector and the conservation of historical buildings and sites, the "Museum Night" project<sup>40</sup> proved to be a successful city event. Since its beginning in 2021, this event has sought to strengthen Bogotá's museum sector, promoting solidarity, creativity and relationships with new audiences. In its last edition in November 2022, 47 museums participated and attracted 39,014 people. Among those attending, 84% were city residents, while the rest included national and international tourists. This underlines the positive impact it has had on the revitalization of Bogotá's night-time cultural offering.

On the other hand, in the amusement parks and theme parks sector, CORPARQUES<sup>41</sup> reported a dramatic increase in revenue for the year 2022. Revenue exceeded 42 billion pesos, representing an impressive 70% increase compared to the previous year. Additionally, visitor numbers soared to 1,131,321, up from 66,000 visitors in 2021. Amusement parks led with 57.3% of revenue, followed by other units and the natural world. This demonstrates significant growth

<sup>39</sup>Source: Bibliored: <https://bibliored.gov.co/noticias/balance-2022-bibliored>

<sup>40</sup>Fountain: <https://idpc.gov.co/museo-de-bogota/bogota-ciudad-de-museos/>

Source: <https://www.infobae.com/america/colombia/2022/12/28/la-tercera-noche-de-los-museos-en-bogota-recibio-39014-visitantes/>

<sup>41</sup>Source: Corparques:

<https://corparques.com/upload/Informe%20de%20sostenibilidad%20Corparques%202022.pdf>

in the entertainment industry in Bogotá.

Additionally, according to information from SICON and the IDPC<sup>42</sup>, in the area of cultural heritage, growing support is observed by 2022 with a 63% increase in the number of proposals and a 103% increase in the amount of resources awarded to cultural agents. In total, 25 incentives were granted through 9 available calls, promoting the appropriation, creation, research, activation, protection and safeguarding of the cultural heritage of Bogotá.

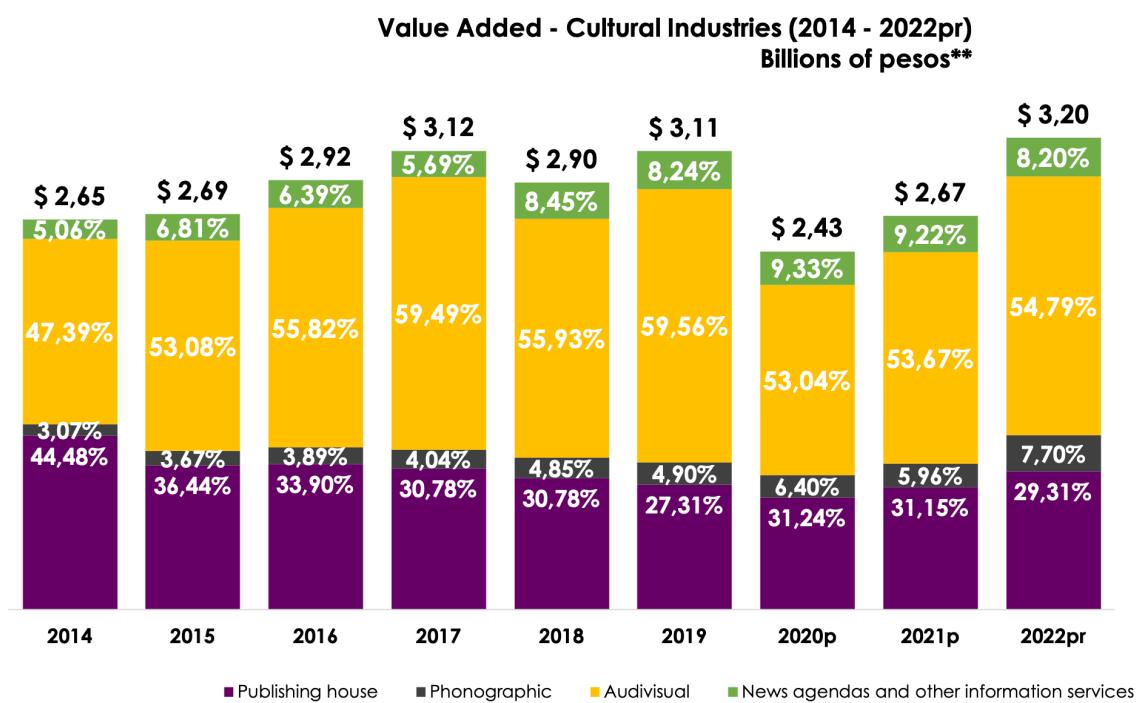
- By 2022, the Manufacturing Activities sector of the cultural and creative economy will exceed \$146 billion pesos\*\* (approximately \$34.43 million). This sector is mainly made up of retail trade activities of clothing and accessories (includes leather goods) in specialized establishments (59.05%\*\*); Production of malt, production of beers and other malted beverages (12.86%\*\*) and Manufacture of clothing, except leather garments (10.00%\*\*), among others. When the behavior of the activities that make up the Manufacturing sector of the creative economy is analyzed, it stands out that between 2014 and 2022 the greatest growth was obtained by the activity of Production of malt, production of beers and other malted beverages with 273.59%. \* and between 2021p and 2022pr, the activity Retail trade of clothing and accessories (includes leather goods) in specialized establishments grew the most with 28.38%\*. On the other hand, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that the activity of Manufacture of clothing, except leather garments, was the one that had the highest growth in added value with 61.79%. \*
- By 2022pr, the Associative and Regulatory Activities sector exceeded \$313 billion pesos\*\* (Approx. 73.60 million dollars). This sector is mainly made up of other associative activities nec (80.59%\*\*); Regulation of the activities of organizations that provide health, educational, cultural and other social services, except social security services (14.67%\*\*) and the activities of professional associations (4.74%\*\*). When the behavior of the activities that make up the Associative and Regulatory Activities sector is analyzed, it is highlighted that the Activities of professional associations presents the greatest growth throughout the series, especially between 2014 and 2022, presenting an increase of 41. 05%\* Likewise, between 2021p and 2022pr this activity was the one that had the greatest growth with 52.59%\*; and when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that added value growth was 67.40%\*.
- By 2022, the Cultural and Creative Education sector will exceed \$915 billion pesos\*\* (Approx. 215.01 million dollars). This sector is mainly made up of basic and secondary education (48.44%\*\*); Higher education (42.33%\*\*) and Education for work and human development (9.22%\*\*). When the behavior of the activities that make up the Cultural and Creative Education sector is analyzed, it is evident that Activities focused on Education for work and human development present the greatest growth in added value when comparing all years with respect to 2022pr, so between 2014 and 2022pr there was an

<sup>42</sup>Source: <https://idpc.gov.co/noticias/pde-2022/3/>

increase of 147.75%\*. Similarly, between 2021p and 2022pr this variation was 7.06%\*; and when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that added value growth was 53.55%\*.

## Cultural Industries

### Results by area



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

The income obtained by the Cultural Industries area went from \$6.06 Billion pesos\*\* in 2014 to \$7.74 Billion pesos\*\* in 2022pr (approximately 1.8 billion dollars), which by eliminating the inflationary effect of these years, a decrease between 2014 and 2022pr of 9.32%\* and a growth of 8.31%\* is evident between 2021p and 2022pr. Likewise, when the income figures for the Cultural Industries area are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), a drop of 2.61%\* is still observed.

Regarding the costs associated with the operation, it is highlighted that these went from \$3.41 Billion pesos\*\* in 2014 to \$4.54 Billion pesos\*\* in 2022pr (Approx. 1.06 billion dollars), taking into account the inflationary effect, a decrease between 2014 and 2022pr of 5.50%\* and a growth of 5.18%\* is evident between 2021p and 2022pr. When the intermediate consumption figures are compared, for the Cultural Industries area between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that they have increased by 0.32%\*.

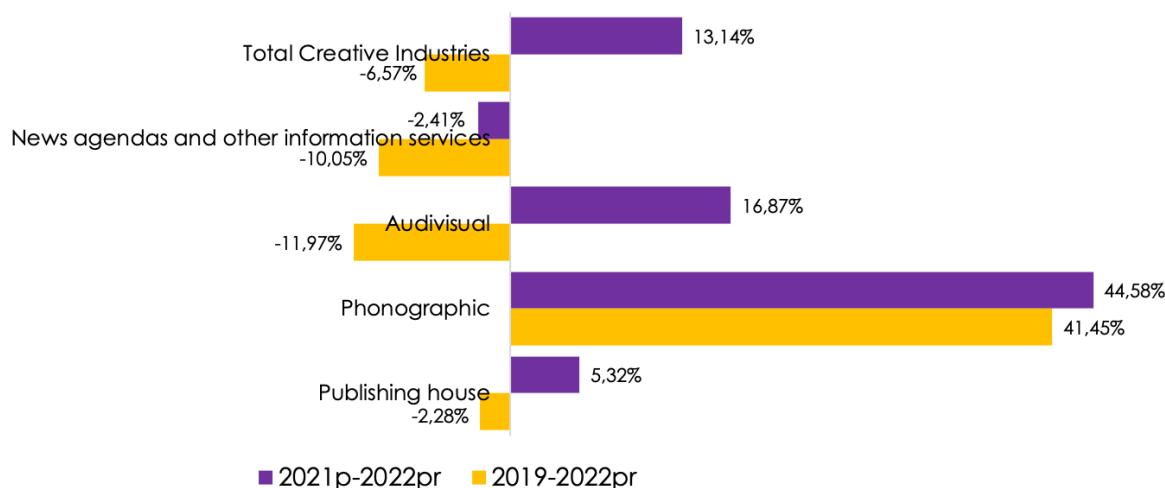
The added value of the Cultural Industries area exceeded \$3.20 Billion pesos\*\* in 2022pr (approximately 752.98 million dollars), a figure that represents 18.63%\*\* of the added value of the cultural economy and creative in Bogotá.

In terms of variation, between 2021p and 2022pr the Cultural Industries area presents a growth of 13.14%\* in its added value. The decrease of 14.35% of the area between 2014 and 2022 is evident. When these figures are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is reflected that there is still a reduction of 6.57%\*.

## Results by sector and activity

For 2022pr, the sectors with the greatest participation in the added value of the Cultural Industries area were the Audiovisual (54.79%\*\*) with a contribution of \$1.76 Billion pesos (approximately 412.52 million dollars); Editorial (29.31%\*\*) with \$939 billion pesos (approximately 220.70 million dollars); news agencies and other information services (8.20%\*\*) with \$262 billion pesos (approximately 61.75 million dollars) and Fonografía (7.70%\*\*) with \$246 billion pesos (approximately 58 .00 million dollars).

**Variation in value added by segment of Cultural Industries 2019-2022pr and 2021p-2022pr**



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In terms of variations, between 2021p and 2022pr the sectors with the greatest growth were the phonographic sector (44.58%\*); the audiovisual sector (16.87%\*); and the publishing sector (5.32%\*). For their part, news agencies and other information media decreased in the last year (-2.41%\*). When the behavior of the sectors is analyzed between 2019 (pre-pandemic) and 2022 (post-pandemic), it is evident that the phonographic sector is the only one in this area that presents growth (41.45%\*), while the publishing, news and audiovisual agencies have not yet reached the levels of the aforementioned year, with reductions of 2.28%\*, 10.05%\* and 11.97%\*, respectively.

When reviewing the participation and variation of the sectors in the added value of Cultural Industries, it is evident that the 13.14%\* growth that the area presented is mainly due to the positive behavior between 2021 and 2022, of the audiovisual sectors (44 .58%\*) and editorial (5.32%\*), given that they weigh 54.79%\*\* and 29.31%\*\*, respectively.

- By 2022, the Publishing sector will exceed \$939 billion pesos\*\* (approximately

\$220.70 million). This added value responds to the activities of Publishing newspapers, magazines and other periodical publications (39.17%\*\*); Book publishing (26.90%\*\*); Other professional, scientific and technical activities nec (15.75%\*\*); Printing activities (11.21%\*\*), other publishing work (3.31%\*\*), book retail trade (2.93%\*\*), printing-related service activities (0.38%\*\*) and literary creation (0.36%\*\*). When the behavior of the activities that make up the Publishing sector is analyzed, it is evident that the literary creation activity was the one that grew the most between 2014 - 2022pr with 335.13%\*. It is important to highlight the volatile arithmetic effect that the results of this activity suffer, as it is one of the ones with the least number of companies in the city. On the other hand, between 2021p - 2022pr the activity of Retail trade of books, newspapers, materials and stationery and desk items in specialized establishments stands out with 23.67%\*. Finally, when the pre-pandemic (2019) and post-pandemic (2022pr) data are compared, the activity that grew the most was literary creation with 16.97%\*.

#### **Context data:**

"The Colombian Book Chamber, a union that brings together Colombian editors, distributors and booksellers, carries out an important study every year on the behavior of the main production and sales variables of the Colombian publishing sector. On this occasion, it presents the statistics corresponding to the behavior of the sector in 2022, which shows recovery compared to the figures recorded during the pandemic.

Publishing activity in Colombia has been affected in recent years by the pandemic, given the confinement and non-face-to-face nature of basic and higher education. During the years 2020 and 2021, sales in both copies and values were below the sales levels recorded in 2019.

#### **Sales**

For the year 2022, the sales indicators in copies and values show a significant recovery and indicate that the levels before the pandemic have already been reached and are even exceeded for some of the subsectors that make up the Colombian publishing offer.

Net sales of the Colombian publishing sector amounted to 900,239 million pesos in 2022, with a growth of 32.9% compared to 2021, showing a real increase, given that this increase is higher than the inflation rate of the previous year.

By subsectors, general interest publications lead sales with a 41% share of the total amount, followed by education publications with 29% of the total. Both editorial lines comprise 70% of total sales.

In units, a total amount of 46.7 million copies were sold in 2022, with an increase of 51.7% compared to the previous year. This growth rate is very significant and shows the recovery of the publishing sector after the difficult years of the pandemic where the demand for publications was greatly affected.

Demand in copies was led by general interest books with a 51% share of sales, followed by the education subsector with 32%. Both subsectors comprise 83% of

the demand for publications in Colombia.

The sector's sales are distributed in 89.1% in printed books and 7.7% in digital books. The latter had significant growth during the pandemic, but in 2022 they returned to pre-pandemic levels.<sup>43</sup>

- By 2022, the phonographic sector will exceed \$246 billion pesos\*\* (approximately \$58.00 million). This added value is made up of sound recording and music editing activities (92.43%\*\*); Production of copies from original recordings (5.11%\*\*) and Musical creation (2.46%\*\*). When the behavior of the activities that make up the phonographic sector is analyzed, it is evident that the activity of Production of copies from original recordings was the one that grew the most between 2014 - 2022pr with 109.51%\*, on the other hand, between 2021p - 2022pr highlights the activity of Musical Creation with 102.63%\*. Finally, when the pre-pandemic (2019) and post-pandemic (2022pr) data are compared, the activity that grew the most was the Production of copies from original recordings with 131.36%\*.

#### **Context data:**

During 2022, the music industry experienced a period of notable growth in various areas. According to the financial statements of the Society of Authors and Composers SAYCO<sup>44</sup>, the current national collection amounted to 145 billion pesos, marking a significant increase of 54% compared to the previous year, which recorded 90 billion pesos in collection. This reflects significant growth in income generation for composers and authors.

In addition, the Colombian Association of Interpreters and Producers<sup>45</sup> reports that effective income in favor of third parties reached 46 billion pesos in 2022, an increase of close to 44% compared to the 32 billion pesos recorded in 2021. These data confirm a flourishing in the music industry in terms of interpretation and production.

The year 2022 marked a resurgence in live music both in Colombia and in the world. Concerts were held in the hope of recovering part of what the pandemic had taken away. In September of that year, Tuboleta<sup>46</sup> reported a 45% increase in its event support compared to 2019, demonstrating strong demand for live music experiences.

Regarding the business fabric in the music industry, according to the Portafolio interview with Nicolás Uribe, executive president of the Bogotá Chamber of Commerce (CCB)<sup>47</sup>, the sector recorded an 18.4% increase in the number of active companies during the first eight months of the year, compared to 2021. This

<sup>43</sup>Recovered from <https://camlibro.com.co/importante-recuperacion-del-sector-editorial-en-2022/> October 5, 2023.

<sup>44</sup>Source: SAYCO in Figures: <http://sayco.org/sayco-en-cifras/>

<sup>45</sup>Source: 2022 management report: <https://acinpro.org.co/docs/esal/estados-financieros.pdf>

<sup>46</sup>Source: <https://www.shock.co/musica/el-2022-llega-a-su-fin-el-ano-de-los-conviertes-en-datos-ex40>

<sup>47</sup>Source: <https://www.portafolio.co/negocios/empresas/industria-musical-reporto-en-bogota-1-561-empresas-activas-571204>

represented 23.2% more active companies compared to the same period in 2020, indicating constant growth and significant.

Finally, projections from PwC's Global Entertainment & Media Outlook (GEMO)<sup>48</sup> suggest that the global music industry, which includes live performances, digital and physical recordings, performance and synchronization rights, could reach US\$67,942 million by 2025. In addition, they mention that Colombia contributed about US\$83 million to this figure during the last year, pointing out potential growth in the international arena. According to Alejandro Cajiao, director of the School of Music, Media, Art and Technology (EMMAT), this highlights Colombia as an "emerging power" in the global music industry, underscoring the importance of the professionalization of artists in the country.

- By 2022, the Audiovisual sector will exceed \$1.75 billion pesos\*\* (Approx. 412.52 million dollars). This added value is made up of subscription television activities (44.58%\*\*); Television programming and transmission activities (17.46%\*\*); Cinematographic film and video exhibition activities (16.62%\*\*); Programming and transmission activities in the sound broadcasting service (11.86%\*\*); Production activities of motion pictures, videos, programs, advertisements and television commercials (4.98%\*\*); audiovisual creation (2.03%\*\*); Distribution activities of motion pictures, videos, programs, advertisements and television commercials (1.12%\*\*); post-production activities for motion pictures, videos, programs, advertisements and television commercials (0.95%\*\*); and retail trade of other cultural and entertainment items nec in specialized establishments (0.40%\*\*). When the behavior of the activities that make up the audiovisual sector is analyzed, it is evident that the activity of Retail trade of other cultural and entertainment items nec in specialized establishments was the one that grew the most between 2014 - 2022pr with 227.99% \*, on the other hand, between 2021p - 2022pr the activity of Cinematographic film and video exhibition activities stands out with 294.18% \*. Finally, when the pre-pandemic (2019) and post-pandemic (2022pr) data are compared, the activity that grew the most was audiovisual creation with 131.61% \*.

#### **Context data:**

The decrease in the added value of film production and post-production activities from 2021 to 2022 in Bogotá coincides with their behavior at the national level.

One factor to consider is the Unified Permit for Audiovisual Filming (PUFA)<sup>49</sup>, which experienced an increase of 1.6% in the last year (1,491 permits in 2021 and 1,525 permits in 2022). It is important to mention that the number of permits granted in both 2021 and 2022 is still significantly below the levels recorded in 2019 (2,135 permits in 2019).

<sup>48</sup>Source: <https://www.larepublica.co/ocio/de-colombia-salen-casi-900-musicos-al-ano-a-competir-en-la-industria-global-3289543>

<sup>49</sup>Source: <https://www.idartes.gov.co/es/transparencia/participa/comision-filmica>. FIRST SEMESTER MANAGEMENT REPORT - 2023.

On the other hand, compared to the exhibition of films and videos, in 2022 attendance at movie theaters increased in all the main cities of the country, with Bucaramanga being the one with the highest percentage growth (78.9%) and Medellín the one with the lowest growth. percentage (44.9%), for its part, Bogotá, being the city that contributes the greatest number of spectators, also presented an increase in the number of moviegoers by 60.5% (8.22 million spectators in 2021 to 13.22 million viewers in 2022).

While in general at the national level there was this increase in viewers; A reduction in the price of a movie ticket was observed between 2021 and 2022. Prices decreased from \$9,292 in 2021 to \$8,966 in 2022, marking a reduction of 3.4%.

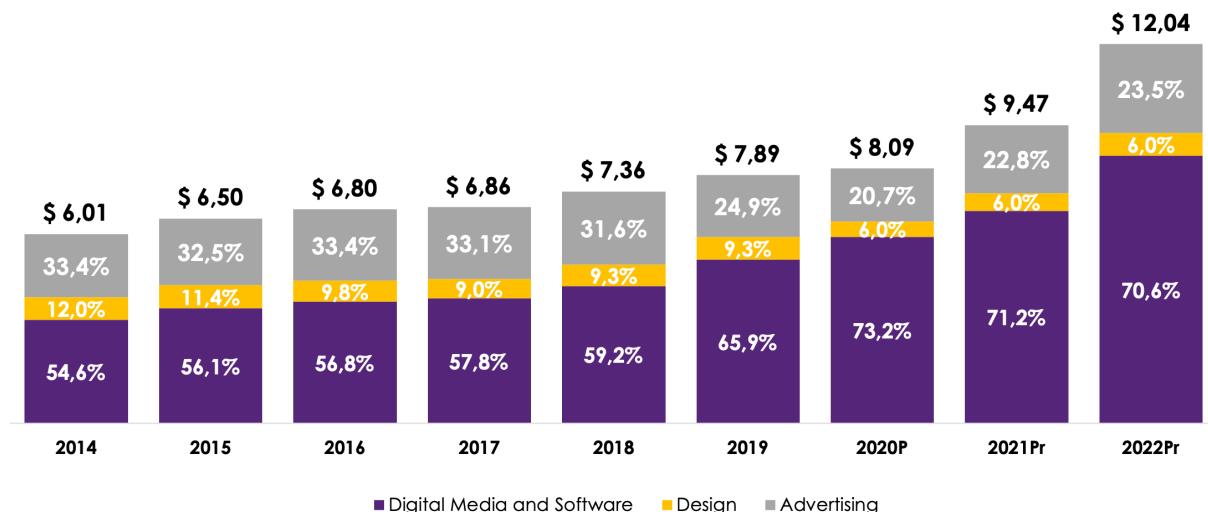
These dynamics in the Colombian film industry reflect the complex interaction between production costs, filming permits and audience preferences, evidencing the need to adapt and maintain competitiveness in a constantly changing market.

- By 2022, the news agency and other services sector will exceed \$262 billion pesos\*\* (approximately \$61.75 million). This added value is made up of the activities of other information services activities nec (94.50\*\*) and the activities of news agencies (5.50\*\*). When the behavior of the activities that make up the news agencies and other services sector is analyzed, it is evident that the activity of news agencies was the one that grew the most between 2014 - 2022pr with 128.35%, on the other hand, between 2021p - 2022pr and 2019 and 2022pr, this same activity stands out with 9.47%\* and 83.11%\*, respectively.

### ***Functional Creations***

#### **Results by area**

**Value Added - Functional Creations (2014 - 2022pr) Billions of pesos\*\*.**



The income obtained by the Functional Creations area went from \$10.14 Billion pesos\*\* in 2014, to \$23.40 Billion pesos\*\* in 2022 (Approx. 5.50 Billion dollars), highlighting the growth between 2014 and 2022pr of 62.89%\* and 15.97%\*, between 2021p and 2022pr. When the income figures for the Cultural Industries area are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that it grows by 35.88%\*.

Regarding the costs associated with the use of production factors of the goods and services of the Functional Creations area, it stands out that these went from \$4.13 Billion pesos\*\* in 2014 to \$11.37 Billion pesos\*\* in 2022pr (approximately 2.67 billion dollars), highlights the growth between 2014 and 2022pr of 94.00%\* and 15.54%\*, between 2021p and 2022pr. When the intermediate consumption figures for the area of Functional Creations are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that intermediate consumption grows by 37.90%\*.

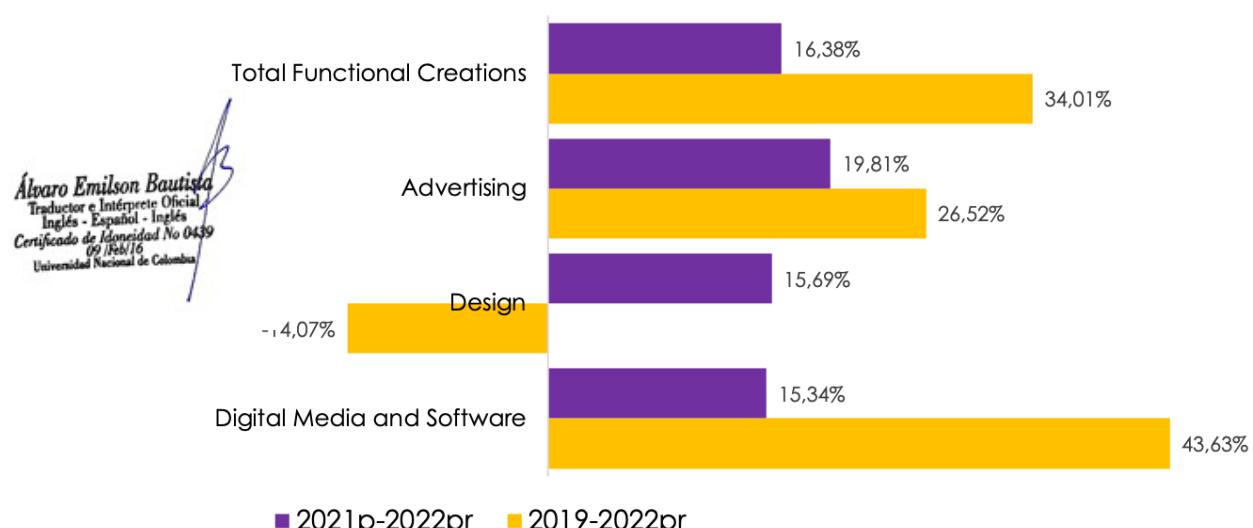
The added value of the Functional Creations area exceeded \$12.04 Billion pesos\*\* in 2022 (Approx. 2.82 billion dollars), a figure that represents 70.0%\*\* of the added value of Culture and the creative economy in Bogotá.

In terms of variation, between 2021p and 2022pr the Functional Creations area has a growth of 16.38%\*. The growth between 2014 and 2022 of 41.45%\* stands out. When the figures of the added value for the area of Functional Creations are compared between 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that 34.01%\*.

### **Results by sector and activity**

By 2022, the sectors with the highest share of added value in the area of Functional Creations (70.6%\*\*) with a contribution of \$8.4 Billion pesos (Approx. 1,996 million dollars); Advertising (23.5x\*\*) with \$2.8 Billion pesos (Approx. 663 million dollars) and Design (6.0%\*\* with \$717 billion pesos (Approx. 168 million dollars).

#### **Variation in value-added by segment of Functional Creations 2019-2022pr and 2021p-2022pr**



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In terms of variations, between 2021p and 2022pr the sectors with the highest growth

were advertising (19.81%\*), design (15.69%\*) and digital media and software (15.34%\*). When analyzing the behavior between 2014 and 2022, it stands out that sectors such as digital media grew by 82.71%\*, however design and advertising decreased by 29.59%\* and 0.56%\*, respectively. On the other hand, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), it is evident that both digital media and software (43.63%\*) and advertising (26.52%\*) grew, but the design still remains at lower levels (decreases by 14.07%\*) than those reached in 2019.

When reviewing the participation of the sectors and the variation in the added value of Functional Creations, it is evident that the 16.38% growth that the area presented is mainly due to the positive behavior between 2021p and 2022pr, of digital media and software ( 15.3%) and advertising (19.8%), given that they weigh 94.04% within the area.

- By 2022, the Digital Media and Software sector will exceed \$8.49 billion pesos\*\* (Approx. 1.99 Billion dollars). This sector is mainly made up of computer systems development activities (planning, analysis, design, programming, testing) (63.55%\*\*); Computer consulting activities and computer facilities management activities (22.75%\*\*); Web Portals (6.62%\*\*); Retail trade of computers, peripheral equipment, computer programs and telecommunications equipment in specialized establishments (4.94%\*\*) and Publishing of computer programs (software) (2.14%\*\*). When the behavior of the activities that make up the Digital Media and Software sector is analyzed, it stands out that between 2014 and 2022, the greatest growth was achieved by the activity of web portals (328.92%\*), publishing of computer programs (289.35%\*). %) and computer retail trade with a growth of more than 273.73%\* and between 2021p and 2022 these same activities lead the top of those that grew the most within the digital media sector with growth of more than 26%\*. On the other hand, when comparing 2019 (pre-pandemic) and 2022 (post-pandemic), the growth of web portals (233.23%\*) stands out, followed by the publishing of computer programs (74.41%\*) and retail trade. minor of computers (69.09%\*).

#### **Context data:**

According to Intel for Americas,<sup>50</sup> In 2022, computer sales would exceed 2.1 million, this is because the Colombian population is demanding computer equipment to develop tasks focused on programming, design and communications. This behavior is the result of the needs derived from the pandemic and the impact of technology on people's lifestyles. Greg Erns, director of Intel, assures that computer sales increased for family consumption and that they are higher than reported for the year 2021.

<sup>50</sup>Taken from: <https://www.larepublica.co/internet-economy/la-industria-del-software-representa-alrededor-de-us-10-000-millones-en-colombia-3330546>

<https://www.larepublica.co/empresas/el-mundo-se-enamoro-de-sus-computadores-en-colombia-venderemos-2-1-millones-3439093#:~:text=En%202022%2C%20naturally%2C%20some%20of,%20computers%20that%20in%202021.>

Likewise, companies in the software sector of any size continue the trend in digital transformation. The most important developments are in security issues, adoption of low-code for developers, cloud data platforms, among others. Additionally, the design of software for companies in the management of human talent and process management has been strengthened.

- By 2022, the Design sector will exceed \$717 billion pesos\*\* (approximately \$168.51 million). This sector is mainly made up of architecture and engineering activities and other related technical consulting activities (72.95%\*\*); Specialized design activities (22.86%\*\*), Manufacture of games, toys and puzzles (3.16%\*\*), Manufacture of jewellery, costume jewelry and related items (1.02%\*\*) and Manufacturing of musical instruments (0.01%\*\*). When the behavior of the activities that make up the Design sector is analyzed, it stands out that between 2014 and 2022 the greatest growth was obtained by specialized design activities (86.15%\*), however the other activities that make up the sector showed decreases. . Between 2021p and 2022, the architecture and engineering activity grew the most (18.92%\*), followed by specialized design activities (8.96%\*), the only activity that is still in the process of recovery from to 2021p data is the manufacture of musical instruments (decrease of 5.76%\*). As for 2019 and 2022, specialized design activities were the ones that grew the most with 54.05%\*, on the other hand, architecture and engineering activities and other related technical consulting activities and Manufacture of jewelry, bijouterie and related items decreased by 24.81%\* and 41.14%\* respectively.

#### **Context data:**

According to reports provided by Procolombia<sup>51</sup>, during the period between January and August 2022, the Industries 4.0 sector in Colombia, specifically with regard to software and information technologies (IT), experienced notable growth in international sales, reaching the figure of US\$258.8 million. This represents an impressive 262% increase compared to the same months in 2021, when sales amounted to US\$71.5 million. This increase in the sector's exports signals a significant and sustained development in the software and IT industry in Colombia.

Furthermore, with regard to human capital, a significant increase has been observed in the number of graduates in areas related to software and information technologies since 2010. This increase has translated into a doubling of professionals in this field. These graduates are distributed mainly in cities such as Atlántico, Antioquia, Bolívar, Santander, Bogotá, Risaralda and Valle del Cauca, which contributes significantly to the growth and strengthening of the business fabric in the region.

On the other hand, it is relevant to highlight the positive influence of national programs in the Capital District. These programs are focused on strengthening the 4.0 revolution and strategies such as "Learn programming"<sup>52</sup> or "digital skills 4.0".

<sup>51</sup>Taken from: <https://prensa.procolombia.co/colombia-hoy/por-que-el-sector-de-software-y-ti-en-colombia-tiene-potencial-exportador>

<sup>52</sup>Taken from: chrome-extension://efaidnbmnnibpcapcglclefindmkaj/https://www.mintic.gov.co/portal/715/articles-237018\_recurso\_1.pdf

These initiatives not only benefit the community of Bogotá, but also contribute to the development and adoption of advanced digital skills and knowledge throughout the country, thus promoting an environment conducive to innovation and competitiveness in the era of the fourth industrial revolution..

- On the other hand, by 2022pr the Advertising sector exceeded \$2.82 Billion pesos\*\* (approximately 663.66 million dollars). This sector is mainly made up of advertising activity (100%). When the behavior of the activity that makes up the Advertising sector is analyzed, it stands out that between 2014 and 2022pr the activity decreased 0.56%\* and between 2021p and 2022 it grew 19.81%. On the other hand, when comparing 2019 (pre-pandemic) and 2022pr (post-pandemic), a growth of 26.52%\* is evident, which indicates a recovery of the sector.

#### **Context data:**

According to the report published by the Interactive Advertising Bureau (IAB)<sup>53</sup> In 2022, a notable increase of 15.4% was observed in total investment in digital advertising in Colombia compared to the previous year. This increase shows the growing importance of online advertising in the country, consolidating itself as an essential component in the marketing strategies of various industry players. Furthermore, digital advertising has acquired considerable relevance, representing 50% of total advertising spending by companies and organizations in Colombia. This reflects the preference and trust placed in digital media as effective channels to reach the desired audience.

On the other hand, the Colombian Union of Advertising Companies (UCEP)<sup>54</sup> mentions a report from Insider Intelligence that indicates an 8% increase in online advertising investment during 2022 compared to the previous year. Big names in the industry, such as Google, Meta (formerly known as Facebook), Alibaba, Amazon and TikTok, stand out as leaders in fundraising in this space, further consolidating their presence in the digital advertising market. By 2023, even more significant growth is anticipated, with a projected 22% increase in digital advertising investment over the previous year. This underlines the continued importance of online advertising as an effective tool for businesses that want to reach their audiences effectively in the ever-evolving digital environment.

In the field of communication, the study titled "The role of OTT services in the communications sector in Colombia"<sup>55</sup>, led by the Communications Regulation Commission, provides a complete vision of the preferences and uses of Over The Top (OTT) services in Colombia, as well as their relationship with traditional communication services. The results of this study indicate that 38% of the companies surveyed allocate resources to advertising, and within these investments, 77% are

<sup>53</sup>Taken from: chrome-extension://efaidnbmnnibpcajpcgjclefindmkaj/https://www.iabcolombia.com/wp-content/uploads/2023/03/17.-Resumen-Executivo-Reporte-Inversio%CC%81n-en-Publicidad- Digital-Total-An%CC%83o-2022.pdf

<sup>54</sup>Taken from: https://www.ucepcol.com/single-post/cual-fue-la-inversion-en-publicidad-online-durante-2022

<sup>55</sup>Taken from: https://www.crcom.gov.co/es/noticias/comunicado-prensa/como-consumen-hogares-y-las-empresas-en-colombia-servicios-tradicionales

directed to digital media. Facebook leads as the most used platform for advertising, with 62% of companies opting for it, followed by Instagram with 58%, and YouTube with 16%.

Also, Digital Marketing statistics for 2022<sup>56</sup> in Colombia reveal that 60% of companies planned to increase their investment in digital strategies during that year, which underlines the growing importance that companies give to online advertising as a fundamental part of their marketing strategies.

Regarding employment in the advertising industry in Bogotá, the Monthly Survey of Bogotá Services<sup>57</sup> reported a significant increase of 19.5% between 2021 and 2022. This increase is due to the need to hire more staff to meet the growing demand in the advertising sector.

Finally, it is important to highlight the valuable work carried out by creative agencies in Colombia, such as Sancho BBDO, MullenLowe SSP3, McCann, Wunderman Thompson, Ogilvy, Havas, Leo Burnett and Grey. These agencies, within the framework of the "El Dorado Festival"<sup>58</sup> In 2022, they received special recognition for their contribution to building the country through innovative ideas and creative pieces that have left a significant mark on the Colombian advertising industry.

### ***Summary of activities of the cultural and creative sector of Bogotá with the greatest growth and decrease between 2019-2022pr and 2021p-2022pr.***

#### ***2019-2022pr:***



<sup>56</sup>Taken from: <https://agenciadigitalamd.com/marketing-digital/estadisticas-de-marketing-digital/>

<sup>57</sup>Taken from: <https://observatorio.desarrolloeconomico.gov.co/servicios/sector-servicios-inicia-el-2022-con-incremento-del-personal-trabajo-en-16-activityes>

<sup>58</sup>Taken from: <https://www.ucepcol.com/single-post/agencias-afiliadas-a-la-ucep-ganadoras-en-eldorado-2022>

**Activities with the Highest Growth between 2019 - 2022Pr, by type of inclusion.**

Type of inclusion	Area - Sector	Activity	2019 (Number constant prices)	2022Pr (Number constant prices)	Variation 2019 - 2022Pr
TOTAL	Arts and Heritage - Heritage	9321 Amusement and theme park activities	25.767	91.062	<b>253,41%</b>
TOTAL	Functional Creations - Digital Media and Software	6312 Web Portals	125.490	418.175	<b>233,23%</b>
TOTAL	Cultural Industries - Audiovisual	9004 Audiovisual creation	11.437	26.490	<b>131,61%</b>
TOTAL	Cultural Industries - Phonographic	1820 Production of copies from original recordings	4.460	10.319	<b>131,36%</b>
TOTAL	Arts and Heritage - Performing Arts and Entertainment	9003 Theatrical creation	2.289	5.192	<b>126,84%</b>
PARTIAL	Functional Creations - Digital Media and Software	4741 Retail sale of computers, peripheral equipment, computer software and telecommunication equipment in specialized stores	184.611	312.152	<b>69,09%</b>
PARTIAL	Arts and Heritage - Associative and Regulatory	9412 Professional associations activities	6.595	11.040	<b>67,40%</b>
PARTIAL	Arts and Heritage - Manufacturing	1410 Manufacture of garments, except leather apparel	7.722	12.494	<b>61,79%</b>
PARTIAL	Arts and Heritage - Heritage	7210 Research and experimental development in the fields of natural sciences and engineering	35.198	52.228	<b>48,38%</b>
PARTIAL	Arts and Heritage - Manufacturing	1391 Manufacture of knitted and crocheted fabrics	1.215	1.773	<b>45,86%</b>

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**Activities with the greatest decrease between 2019 - 2022Pr, by type of inclusion.**

Type of inclusion	Area - Sector	Activity	2021P (Number constant prices)	2022Pr (Number constant prices)	Variation 2021P - 2022Pr
TOTAL	Cultural Industries - Aundiovisual	5914 Cinematographic film and video exhibition activities	391.949	205.726	-47,51%
TOTAL	Arts and Heritage - Performing arts and shows	9008 Other live entertainment activities	24.491	16.049	-34,47%
TOTAL	Cultural Industries - Aundiovisual	5911 Cinematographic film, video, program, advertisement, and television commercial production activities	79.118	61.693	-22,02%
TOTAL	Arts and Heritage - Performing arts and shows	9006 Theatrical activities	41.571	32.652	-21,46%
TOTAL	Cultural Industries - Aundiovisual	6010 Programming and broadcasting activities in the radio broadcasting service	185.457	146.793	-20,85%
PARTIAL	Arts and Heritage - Manufacturing	1690 Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials, basketware and wickerwork	3.247	1.883	-42,01%
PARTIAL	Functional Creations - Design	3210 Manufacture of jewelry, costume jewelry and related items	10.613	6.247	-41,14%
PARTIAL	Arts and Heritage - Manufacturing	2396 Stone cutting, carving and finishing	78	50	-36,47%
PARTIAL	Arts and Heritage - Manufacturing	1640 Manufacture of wooden containers	3.169	2.207	-30,36%
PARTIAL	Arts and Heritage - Manufacturing	2310 Manufacture of glass and glass products	481	336	-30,23%

**Activities with the highest growth between 2021P - 2022Pr, by type of inclusion.**

Type of inclusion	Area - Sector	Activity	2021P (Number constant prices)	2022Pr (Number constant prices)	Variation 2021P - 2022Pr
TOTAL	Cultural Industries - Aundiovisual	5914 Exhibition of cinematographic films and videos	52.190	205.726	294,18%
TOTAL	Cultural Industries - Phonographic	9002 Musical creation	2.225	4.509	102,63%
TOTAL	Arts and Heritage - Performing Arts and Entertainment	9003 Theatrical creation	2.739	5.192	89,54%
TOTAL	Arts and Heritage - Heritage	9103 Botanical gardens, zoos and natural reserves	9.752	17.793	82,45%
TOTAL	Arts and Heritage - Performing and performing arts	9006 Theatrical	18.371	32.652	77,74%
PARTIAL	Cultural Industries - Associations and regulation	9412 Professional Associations	7.235	11.040	52,59%
PARTIAL	Functional Creations - Digital media and software	4741 Retail sale of computers, peripheral equipment, computer software and telecommunication equipment in specialized stores	237.282	312.152	31,55%
PARTIAL	Arts and Heritage - Manufacturing	4771 Retail sale of clothing and clothing accessories (including leather goods) in specialized stores	57.597	73.943	28,38%
PARTIAL	Arts and Heritage - Manufacturing	1522 Manufacture of other types of footwear, except footwear of leather and fur	527	660	25,36%
PARTIAL	Cultural Industries - Publishing	4761 Retail sale of books, newspapers, stationery, stationery and writing materials and articles in specialized stores	16.527	20.440	23,67%

  
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According to data collected in the report "Cinema in figures 2022"<sup>59</sup>, the total film box office in Colombia during the year 2022 reached the figure of \$476,755,806,969 COP in nominal terms. However, when adjusting this data to eliminate the effect of inflation over the years, taking December 2018 as a reference year, it is observed that the box office experienced an increase of \$119,929 million COP. In other words, an increase of 46.42% was recorded compared to the entire year 2021 at the national level. It is important to highlight that in this context, Bogotá plays a leading role, since it represents the majority both in terms of box office and spectators in the country.

During 2022, theater creation in Bogotá experienced a notable boom, influenced by multiple factors. A key component was the significant increase in collections from SAYCO and the Colombian Association of Performers and Producers, reflecting a favorable environment in the live music industry both locally and globally.

This growth aligns with global projections for the music industry and contributes to the cultural and artistic enrichment of Bogotá. The year was marked by notable initiatives, such as the Ibero-American Theater Festival and the Bogotá Theater and Circus Festival, which brought the performing arts to multiple locations in the city. Furthermore, the reopening of theaters at full capacity and investment in new productions are encouraging signs for the flourishing theater scene in the city. In summary, 2022 was a vibrant and promising year for the performing arts in Bogotá.

<sup>59</sup>Taken from:

[https://www.proimagenescolombia.com/secciones/cine\\_colombiano/cine\\_en\\_cifras/cine\\_cifras\\_listado.php](https://www.proimagenescolombia.com/secciones/cine_colombiano/cine_en_cifras/cine_cifras_listado.php)

  
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**Activities with the greatest decrease between 2021P - 2022Pr, by type of inclusion.**

Type of inclusion	Area - Sector	Activity	2021P (Number constant prices)	2022Pr (Number constant prices)	Variation 2021P - 2022Pr
TOTAL	Cultural Industries - Aundiovisual	5912 Post-production activities for cinematographic films, videos, programs, commercials and television commercials	13.193	11.792	-10,62%
TOTAL	Cultural Industries - Aundiovisual	5911 Cinematographic film, video, program, program, commercial and television commercial production activities	68.133	61.693	-9,45%
TOTAL	Functional Creations - Design	3220 Manufacturing of musical instruments	83	78	-5,76%
TOTAL	Cultural Industries - Publishing	9001 Literary creation	2.645	2.508	-5,19%
TOTAL	Cultural Industries - News Agencies	6399 Other information services activities n.c.p.	190.403	184.649	-3,02%
PARTIAL	Arts & Heritage - Manufacturing	2396 Stone cutting, carving and finishing	69	50	-27,77%
PARTIAL	Arts & Heritage - Manufacturing	1392 Manufacture of made up articles of textile materials, except garments	479	421	-12,11%
PARTIAL	Arts & Heritage - Manufacturing	1313 Finishing of textile products	247	219	-11,28%
PARTIAL	Cultural Industries - Publishing	7490 Other professional, scientific and technical activities n.c.p.	121.205	109.963	-9,28%
PARTIAL	Arts and Heritage - Manufacturing	2599 Manufacture of other fabricated metal products n.c.p.	1.416	1.288	-9,06%

The film and audiovisual production industry in Bogotá has experienced notable changes in recent years, particularly in the period from 2021 to 2022. These changes are reflected in key aspects that have impacted this sector. First of all, the importance of efficient cost management is highlighted, since these represent a significant part of the industry's total revenue.

On the other hand, the Unified Permit for Audiovisual Filming (PUFA) showed a modest variation between 2021 and 2022, although it has not yet reached pre-pandemic levels, suggesting that the industry continues to recover from the challenges it faced during that period. .

In terms of audience, there was an increase in attendance at film events in Colombia, while the average ticket price experienced a decrease. This could indicate efforts to maintain cinema accessibility for the public, despite economic difficulties.

In summary, the film industry in Bogotá is in a process of adaptation and recovery after the challenges presented by the pandemic. Cost management, the evolution of filming permits and changes in ticket prices are key factors that reflect the dynamics of this ever-changing sector.

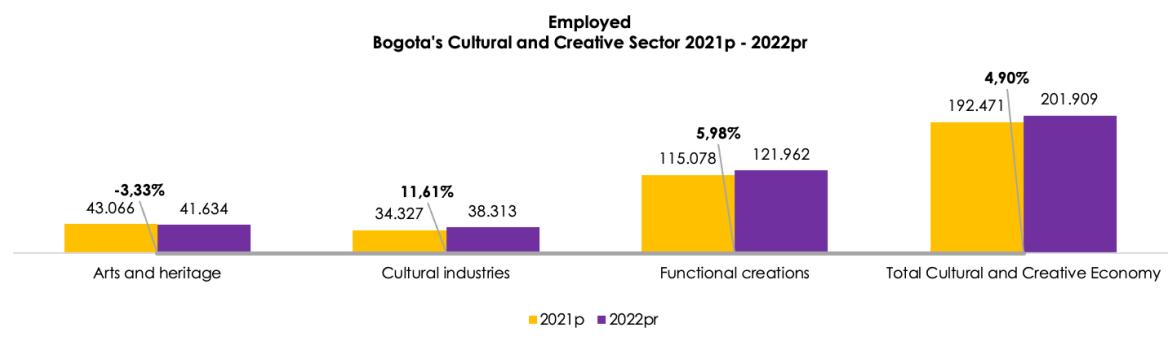
## 6. Results of the CSECCB in terms of Employment and Jobs

The employment information presented by the CSECCB is given in terms of employed persons and Full-Time Equivalent Job Positions (PTETC). Due to the methodological change in the sampling frame of the base survey that DANE implemented for its update, in accordance with the framework and results of the last national population and housing census, carried out in 2018, from this publication of results, the CSECCB takes as a reference the information from the Large Integrated Household Survey (GEIH) with a 2018 framework.

This modification takes into account demographic aspects and the changes in population distribution that the country has experienced in the period between the two census operations. Additionally, GEIH-Framework 2018 includes recommendations from organizations such as the International Labor Organization (ILO) and the Organization for Economic Cooperation and Development (OECD), related to the characterization of the Working Age Population (PET) and the statistical visibility of different population groups, keeping Colombian labor market statistics aligned with international standards.

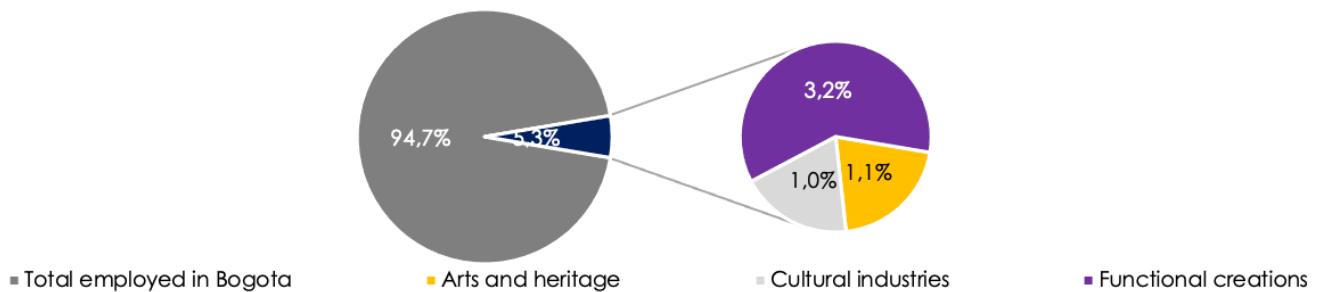
Therefore, starting from this publication, the CSECCB presents information for employed persons and PTETC for the periods 2021 and 2022:

## Busy



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

### Participation of employed persons in the Cultural and Creative Economy by area in the total number of employed persons in Bogota 2022pr



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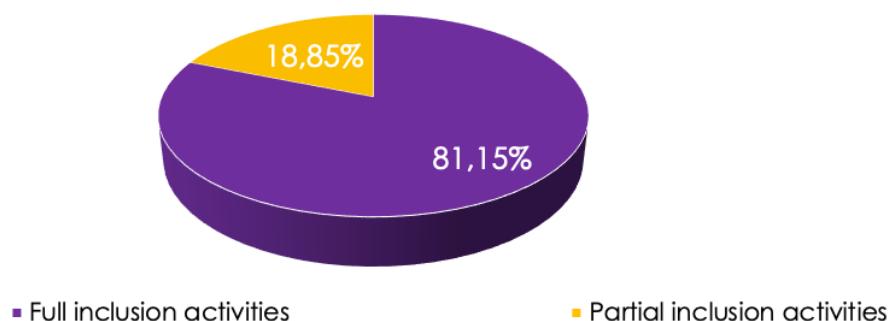
Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In 2022pr, the number of people employed in cultural and creative economy activities in Bogotá was 201,909, representing 5.3% of the total employed in the city and 28.9% of the total employed in the country. (excluding cultural tourism). For its part, the construction sector and the financial and insurance sector contributed 4.9% and 4.4% of the city's total employed persons in terms of employed persons by 2022pr, respectively.

The area with the largest number of employees was Functional Creations with a participation of more than 60%. In addition, it was also the area with the highest growth rate between 2021p and 2022pr, being 11% higher.

In terms of variation, those employed in cultural and creative activities grew 4.90% between 2021p and 2022pr. For these years, those employed in the construction sectors decreased by 2.7% and the financial and insurance sector increased by 6.8%.

### Employed by type of inclusion 2022pr

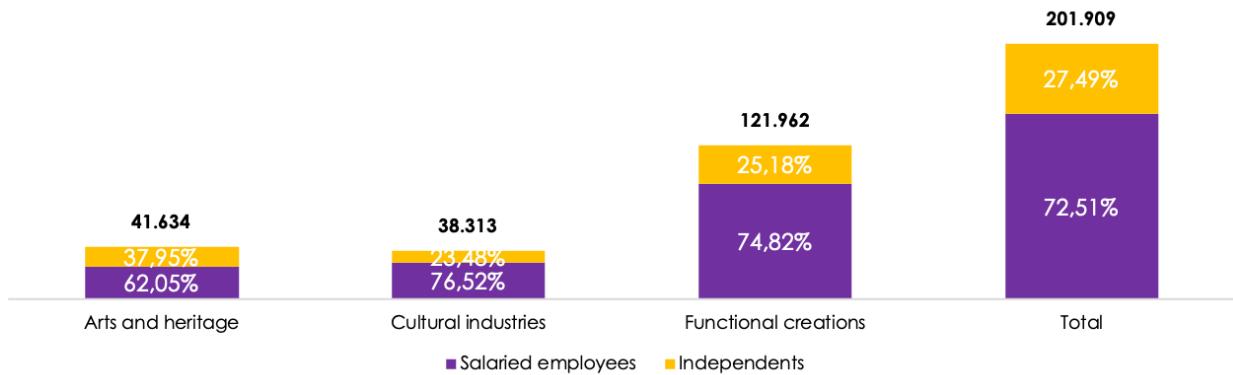


Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

Regarding the type of inclusion, by 2022, total inclusion activities contributed to 81.15% of the population employed in Cultural and Creative Economy activities in the Capital District, which represents a decrease of 0.64% compared to the previous year. year 2021p, in this category of employed people. For their part, partial inclusion activities represented 18.85% of those employed in the sector and grew by 38.03% compared to 2021p.

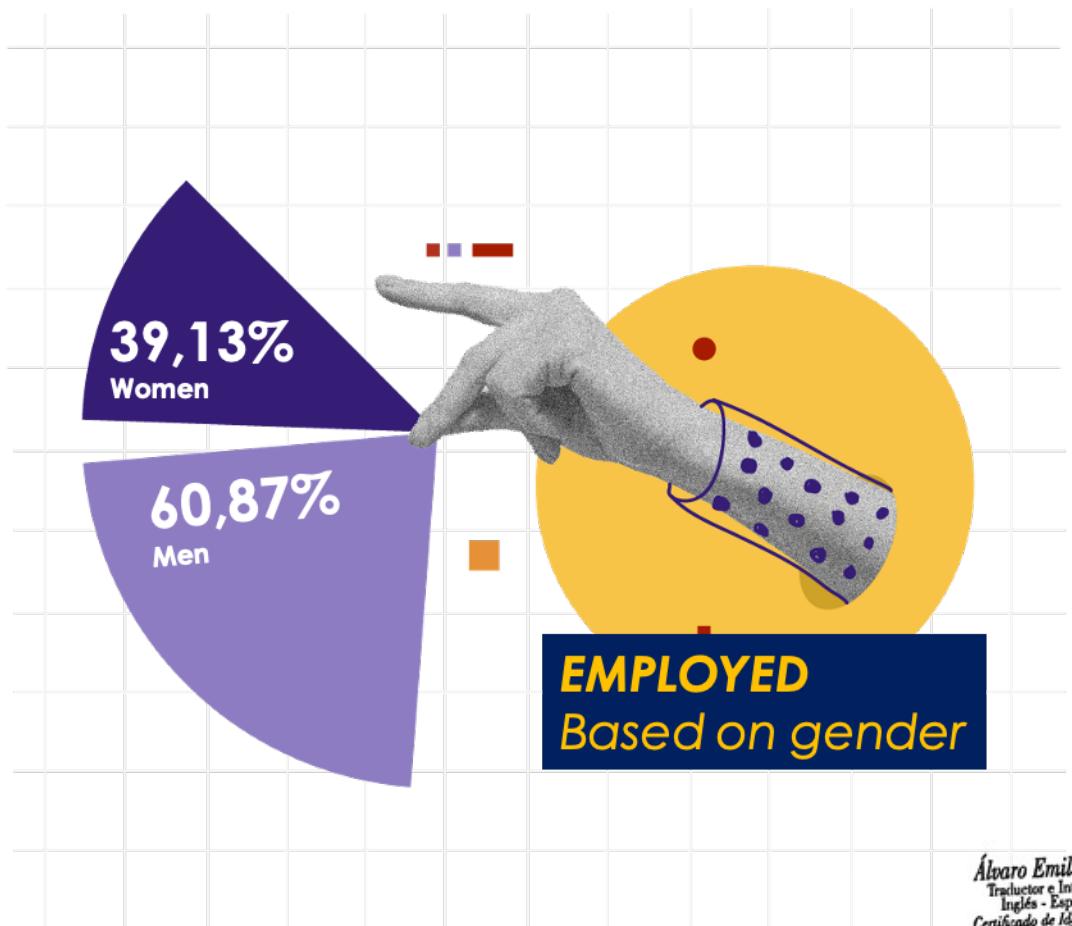
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## Employed population by area and professional category 2022pr



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

In 2022pr, of the total number of employed persons (201,909), 72.51% correspond to employees and 27.49% to self-employed workers. In terms of variations, between 2021p and 2022pr, salaried employees grew by 10.23% and self-employed workers decreased by 6.96%.



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

Regarding the employed population in the cultural and creative economy of Bogotá by sex, the participation of men compared to women stands out for both 2021p (60.77%) and 2022pr (60.87%). Likewise, the growth (5.08%) between 2021p (116,973) and 2022pr (122,912) of men employed in activities in the sector stands out. For their part, women participated in 39.23% in 2021p and in 39.13% in 2022pr, thus reporting a total of 75,498 employed persons in 2021p and 78,997 employed persons in 2022pr (growth of 4.63%).

## **Arts and Heritage**

### **Results by area and segment (grouping of sectors)**

In 2022pr, the Arts and Heritage area of the Cultural and Creative sector of Bogotá reported 41,634 employed people, a figure that represents 20.62% of the total employed in the cultural and creative sector and 1.09% of the total employed from the city.

In terms of variation, between 2021p and 2022pr the Arts and Heritage area had a decrease in employed persons of 3.33%\*.

On the other hand, for 2022pr the sectors with the greatest participation in terms of employed people in the area of Arts and Heritage were Cultural and Creative Education; associative and regulatory activities with 42.07%, followed by visual arts; performing arts with 33.06%.

In terms of variations, between 2021p and 2022pr the sectors with the greatest growth in employment were Cultural Heritage with 8.97%, while sectors such as Visual Arts; performing arts decreased (18.71%).

For the year 2022, the Arts and Heritage area reported 25,832 salaried employed people and 15,802 independent employed people. For the year in question, in the area of Arts and Heritage, the number of salaried people in the activities of cultural and creative education and associative and regulatory activities stands out with 14,395 employed in Bogotá, presenting a growth of 7.8% compared to the previous year. 2021p.

## **Cultural Industries**

### **Results by area and segment (grouping of sectors)**

In 2022, the Cultural Industries area of the Cultural and Creative sector of Bogotá reported 38,313 employed people, a figure that represents 18.98% of the total employed in the cultural and creative sector and 1.00% of the total employed in the city.

In terms of variation, between 2021p and 2022pr the Cultural Industries area had an

employment growth of 11.61%.

For the year 2022, the Cultural Industries area reported 29,319 salaried employees and 8,994 independent employees.

Those employed in the publishing sectors; News agencies and other information services represent 30.74% of the total number of employees, while those employed in the audiovisual and phonographic sectors represent 69.26%. Likewise, the number of salaried people in the audiovisual and phonographic sectors stands out with a participation of 73.83%, since this occupational category presented an increase of 41.29% compared to 2021p. The publishing sectors, news agencies and other information services had 26.17% of salaried employees in 2022.

### ***Functional Creations***

#### ***Results by area and segment (grouping of sectors)***

In 2022pr, the Functional Creations area of the Cultural and Creative sector of Bogotá reported 121,962 employed people, a figure that represents 60.40% of the total employed in the cultural and creative sector and 3.19% of the total employed in the city.

In terms of variation, between 2021p and 2022pr the Functional Creations area had a growth in employees of 5.98%.

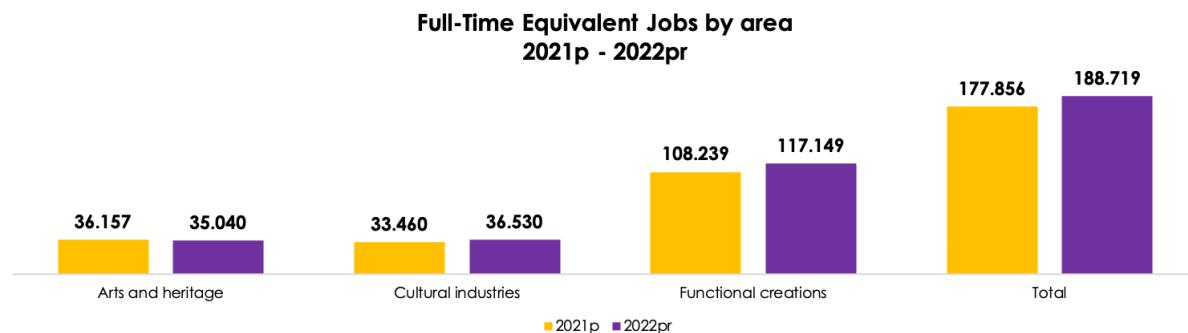
On the other hand, for 2022pr the sectors with the greatest participation in terms of employed people in the area of Functional Creations were Digital Media and software; website; computer systems development activities (planning, analysis, design, programming, testing) with 57.19% and advertising with 32.27%.

In terms of variations, between 2021p and 2022pr the sectors with the greatest growth in employment were Digital media and software; website; computer systems development activities (planning, analysis, design, programming, testing) with 28.41%, however there was a decrease in the design and advertising sectors with 5.80% and 16.46% respectively.

For the year 2022, the Functional Creations area reported 91,258 employed salaried people and 30,704 independent employed people. For the year in question, in the area of Functional Creations, the number of salaried people in the activities of Digital Media and software stands out; website; computer systems development activities (planning, analysis, design, programming, testing) with 57,476 employees in Bogotá, presenting a growth of 23.80% compared to the previous year.

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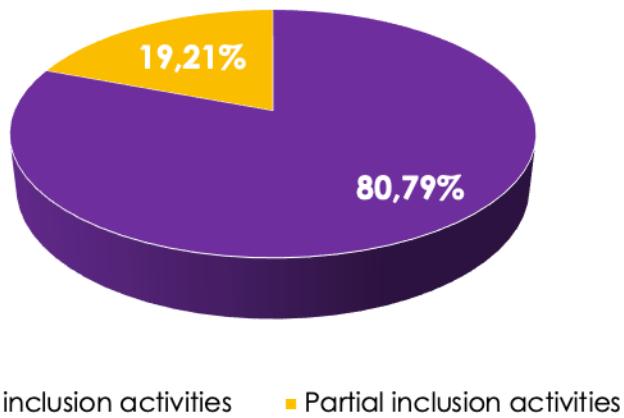
## Full Time Equivalent Jobs (TECT)



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

For the year 2022pr, 188,719 Full-Time Equivalent Job positions were presented in the Culture and Creative Economy in Bogotá, which represented a growth of 6.11% compared to the year 2021p and in terms of sex, women represent 38.64% with an increase compared to 2021p of 7.66%, while men represent 61.36% with a growth of 5.15% compared to the previous year.

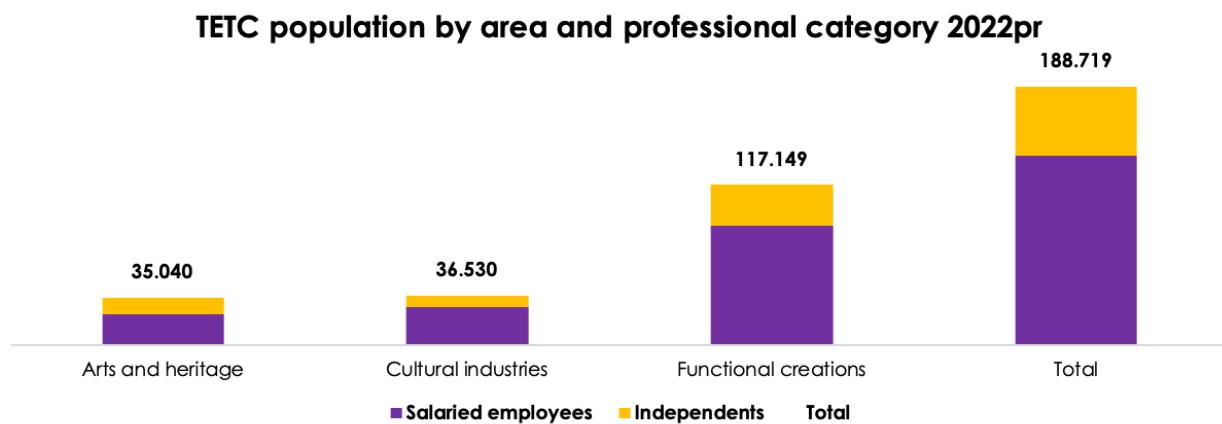
## Full-Time Equivalent Jobs by Type of Inclusion 2022pr



Source: Satellite Account of Cultural and Creative Economy of Bogotá. Dane - Mayor's Office of Bogotá - Ministry of Culture, Recreation and Sports (2023). Own elaboration.

Regarding the type of inclusion, by 2022pr, total Inclusion activities contributed 80.79% of the Full-Time Equivalent Jobs in the Culture and Creative Economy in the Capital District, which represents an increase of 0.59% with respect to the year 2021p, in this category. For its part, partial inclusion activities represented 19.21% but had a growth of 37.89% of TETCs.

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## Arts and Heritage

### Results by area and segment (grouping of sectors)

For the year 2022pr, the Arts and Heritage area contributed 35,040 full-time jobs, a figure that represents 18.57% of the Full-Time Equivalent Jobs (TETC) in the Culture and Creative Economy sector in Bogotá ; within which the segments that had the most participation were those related to cultural and creative education; associative and regulatory activities with 41.74%.

Full-time equivalent jobs for the area presented a negative variation of 3.09% compared to 2021p. Of these jobs, 65.40% correspond to the occupational category of salaried employees and the remaining 34.60% to self-employed workers. For the year 2022, the Arts and Heritage area reported 22,915 salaried jobs, presenting a decrease of 0.50% compared to the previous year. And in terms of independent workers in Full-Time Equivalent Job positions, 12,125 independent workers were reported, which represents a reduction of 7.63% compared to 2021p.

Finally, it is important to highlight that the gap between employed people and full-time equivalent jobs has decreased by 0.2 percentage points, going from 16.04% in 2021 to 15.84% in 2022.

## Cultural Industries

### Results by area and segment (grouping of sectors)

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In 2022pr, the Cultural Industries area reported 36,530 full-time jobs, a figure that represents 19.36% of the Full-Time Equivalent Jobs (TETC) in the Culture and Creative Economy sector in Bogotá for 2022pr; and its Audiovisual and phonographic segment stands out for contributing 70.89% of TETC.

Full-time equivalent jobs for the area presented a positive variation of 9.2% in the last

year and contributed 19.4% of the total jobs in the sector, in this period. Of these jobs, 77.4% correspond to the occupational category of salaried employees and the remaining 22.5% to self-employed workers. On the other hand, in the area of Cultural Industries, in 2022pr, 28,299 jobs were reported as salaried employees, presenting a growth of 15.46% compared to the previous year. In terms of independent employees in Full-Time Equivalent Job positions, more than 8,231 jobs occupied as independent workers were reported, which represented a reduction of 8.04% compared to 2021p.

Finally, it is important to highlight that the gap between employed people and full-time equivalent jobs increased by 2.1 percentage points, going from 2.5% in 2021 to 4.7% in 2022.

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## **Functional Creations**

### **Results by area and segment (grouping of sectors)**

For the year 2022pr, the Functional Creations area contributed 117,149 full-time jobs, a figure that represents 62.08% of the Full-Time Equivalent Jobs (TETC) in the Culture and Creative Economy sector of the district capital. Digital media and software stand out within the area; Website; and Computer systems development activities (planning, analysis, design, programming, testing) with 57.05% TETC.

Full-time equivalent jobs for the area presented a positive variation of 8.2% in the last year and contributed 62.1% of the total jobs in the sector, in this period. Of these jobs, 74.3% correspond to the occupational category of salaried employees and the remaining 25.6% to self-employed workers. On the other hand, in the area of Functional Creations, in 2022, 87,061 jobs were reported as employees in Full-Time Equivalent Job positions, showing a growth of 6.04% compared to the previous year. In terms of independents in Full-Time Equivalent Job positions, 30,088 were reported, which represented a growth of 15.11% compared to the year 2021p.

Finally, it is important to highlight that the gap between employed people and full-time equivalent jobs was reduced by 2 percentage points, going from 5.9% in 2021 to 3.9% in 2022.

## **7. Conclusions**

The Arts and Heritage area, despite its relatively minor contribution in terms of added value and employment, has shown sustained growth over time since 2017, with the exception of the pandemic period (2020), reflecting a solid and constantly changing sector expansion. Due to the characteristics of the activities that are grouped in this area, as well as with the support of research such as Organization Characterization (SCRD 2019 and SCRD 2022), this behavior can be attributed to the fact that their establishments are led by artists with business knowledge. empirical, preserving quality in its products, without fully exploiting the economic potential of its activities, which deserves to be supported and sophisticated by programs to strengthen business capabilities, by the exploration of financial support mechanisms adapted to its specific needs and the expansion towards New markets.

The Cultural Industries area has demonstrated efficiency and productivity by achieving greater added value with a smaller number of workers, which raises the possibility of reviewing the models and implementing similar strategies in other cultural and creative subsectors, also generating a call for innovation. and to the optimization of resources, the search for new forms of work, training and the development of adaptive skills, as essential characteristics to guarantee the evolution of the sector and promote equity in the labor market in this area.

The area of functional creations has become a fundamental pillar of the cultural and creative economy of Bogotá, standing out not only for its capacity to generate economic value, but also for its social impact by contributing significantly to the creation of quality employment and the reduction of the gap between casual workers and full-time jobs. This sector reflects a virtuous balance between artistic-creative expression and the generation of stable income.

In general, although the area of functional creations represents an important proportion in economic terms of the cultural and creative sector of Bogotá, standing out for its capacity to generate economic value and quality employment, the data evidenced in the present study reveal the need to continue with the execution of actions that promote and solidify the entrepreneurial and business intentions of the more traditional subsectors of culture and creativity, such as the arts, heritage and cultural industries. In line with the above, the panorama of the creative sector in Bogotá is presented as fertile ground for the formulation of public policies that promote its sustainable growth and its positive impact on society. Functional creations and cultural industries have laid the foundations for an economy that fuses artistic expression with the generation of employment and economic value. This balance between art and financial stability is an opportunity that must be cultivated.

Consequently, it is important to highlight the relevance of the District Public Policy of Cultural and Creative Economy, through which it seeks to achieve specific objectives to contribute to the progressive improvement of the conditions of entrepreneurs in the cultural and creative sector and, thus, of the macroeconomic aggregates presented by the CSECCB, namely: i. adequate spaces for the development of cultural and creative activities, ii. strengthening of entrepreneurial and business capacities of agents, iii. financial support mechanisms, iv. expansion of markets and v. knowledge management.

Finally, it is important to highlight that this research contributes to the fulfillment of the Sustainable Development Goals (SDGs), since it strengthens the generation of information, the analysis of urban policies, the promotion of innovation and the training of professionals, thus contributing to making informed decisions, designingsustainable urban solutions and monitoring progress towards goals of inclusion, safety, resilience and sustainability in urban environments.

## 8. Challenges

Some of the main challenges for the city are framed in the strengthening of social and economic statistics for decision making. For example, it is important to mention that there is a need to strengthen primary information sources and administrative records, in such a way that figures by sex are consolidated; This segmentation is important to

support plans, projects and programs with a differential approach, in a more accurate way and closer to reality.

Likewise, it is pertinent to mention that there is a challenge in strengthening the sources of information that consolidate economic data by institutional sectors, on the trade of goods and services at the subnational level, as well as for the formation of the balances between supply and demand of the cultural and creative market.

Finally, it is important to recognize that although institutions are increasingly getting closer to meeting this objective, they must still strive for the production of timely, standardized and freely accessible information, to achieve more effective decisions with efficient results.

## 9. Glossary

**Glosario**

**Actividades de inclusión total:** "Las actividades de inclusión total hacen referencia a las actividades económicas pertenecientes a las clases seleccionadas de la CIIU Rev. 4 A.C. que son consideradas como *actividades económicas de carácter cultural*, y aquellas actividades creativas en las cuales todos sus productos están protegidos por el derecho de autor" (tomado de Metodología General Cuenta Satélite de Cultura y Economía Naranja, DANE 2021).

**Actividades de inclusión parcial:** "Las actividades de inclusión parcial son aquellas actividades económicas creativas en las cuales solamente algunos de sus productos están cobijados por el derecho de autor" (tomado de Metodología General Cuenta Satélite de Cultura y Economía Naranja, DANE 2021).

**Campo cultural:** "Conjunto de actividades humanas y sus manifestaciones cuya razón de ser consiste en la creación, producción, difusión, transmisión, consumo y apropiación de contenidos simbólicos relacionados a las artes y el patrimonio". (Convenio Andrés Bello, 2015, párrafo 40)

**Datos preliminares (pri):** "Hace relación a un avance con la información disponible y recopilada, de manera resumida del sistema de Cuentas Departamentales".

**Datos provisionales (pri):** "Corresponden a datos que conservan la metodología y el acervo estadístico, para el año de referencia n, a partir de la información disponible a la fecha programada para la publicación; estos datos pueden ser modificados para convertirse en definitivos".

**Ocupados:** son aquellas que se encontraban durante el período de referencia en una de las siguientes situaciones:

1. Trabajó por lo menos una hora remunerada en la semana de referencia.
2. Los que no trabajaron la semana de referencia, pero tenían un trabajo.
3. Trabajadores sin remuneración que trabajaron en la semana de referencia por lo menos una (1) hora.

<https://www.dane.gov.co/index.php/estadisticas-por-tema/mercado-laboral>

**Precios corrientes:** "es el valor de las operaciones a precios del momento del registro, es decir que incluye el efecto inflacionario".

**Precios constantes:** "es el valor de las operaciones a un precio que se ha elegido como base y por lo tanto no contiene efecto inflacionario".

**Trabajo equivalente a tiempo completo:** "Mide la intensidad del factor trabajo utilizado en un proceso productivo y es expresado en términos de la jornada normativa. Se calcula dividiendo el total de horas efectivamente trabajadas por el promedio anual de horas legalmente trabajadas en puestos de trabajo de tiempo completo (48 horas semanales para Colombia(DANE, 2018)." [https://www.dane.gov.co/files/investigaciones/pib/sateli\\_cultura/bogota/Bole\\_Cta\\_Sat\\_Cul\\_Bog\\_2010\\_2017.pdf](https://www.dane.gov.co/files/investigaciones/pib/sateli_cultura/bogota/Bole_Cta_Sat_Cul_Bog_2010_2017.pdf)

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## 10. Annexes

### Anexos

DESCRIPCIÓN	CIIU	INCLUSIÓN
1 Producción de copias a partir de grabaciones originales	1820	TOTAL
2 Fabricación de instrumentos musicales	3220	TOTAL
3 Fabricación de juegos, juguetes y rompecabezas	3240	TOTAL
4 Edición de libros	5811	TOTAL
5 Edición de periódicos, revistas y publicaciones periódicas	5813	TOTAL
6 Otros trabajos de edición	5819	TOTAL
7 Edición de programas de informática (software)	5820	TOTAL
8 Actividades de producción de películas cinematográficas, videos, programas, anuncios y comerciales de televisión	5911	TOTAL
9 Actividades de postproducción de películas cinematográficas, videos, programas, anuncios y comerciales de televisión	5912	TOTAL
10 Actividades de distribución de películas cinematográficas, videos, programas, anuncios y comerciales de televisión	5913	TOTAL
11 Actividades de exhibición de películas cinematográficas y videos	5914	TOTAL
12 Actividades de grabación de sonido y edición de música	5920	TOTAL
13 Actividades de programación y transmisión en el servicio de radiodifusión sonora	6010	TOTAL
14 Actividades de programación y transmisión de televisión	6020	TOTAL
15 Actividades de desarrollo de sistemas informáticos (planificación, análisis, diseño, programación, pruebas)	6201	TOTAL
16 Portales web	6312	TOTAL
17 Actividades de agencias de noticias	6391	TOTAL
18 Otras actividades de servicio de información n.c.p	6399	TOTAL
19 Publicidad	7310	TOTAL
20 Actividades especializadas de diseño	7410	TOTAL
21 Actividades de fotografía	7420	TOTAL
22 Enseñanza cultural	8553	TOTAL
23 Creación literaria	9001	TOTAL
24 Creación musical	9002	TOTAL
25 Creación teatral	9003	TOTAL
26 Creación audiovisual	9004	TOTAL
27 Artes plásticas y visuales	9005	TOTAL
28 Actividades teatrales	9006	TOTAL



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