

2022 Cultural Administration Research Survey

A Quantitative Evaluation:
The Economic and Social Effects of Culture (6)

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Abbreviations

CSA	Culture Satellite Account
DCMS	Department for Digital, Culture, Media and Sport, United Kingdom
EBOPS	Extended Balance of Payments in Service
EBPM	Evidence-Based Policy Making
FCS	Framework for Cultural Statistics
GDP	Gross Domestic Product
HS	Harmonized Commodity Description and Coding System
SNA	System of National Accounts
TSA	Tourism Satellite Account
UIS	UNESCO Institute for Statistics
VA	Value Added

Note 1: This survey was conducted with the advice, cooperation, and supervision of the "Research Council for "A Quantitative Evaluation: The Economic and Social Effects of Culture" organized by the trustee, CDI. (The Agency for Cultural Affairs commissioned the research council members.) "This survey" or "we" in this report refers to this research council.

Note 2: Monetary amounts converted into Japanese yen or US dollars in this report use the IMF (International Monetary Fund) exchange rate (annual average).

Note 3: Figures and tables in the text with no visible references were created by CDI and are primarily based on the sources listed at the end of this document.

Note 4: The figures in the table are rounded off. Breakdowns and totals may differ.

The Framework of this research

This report is the result of the "2022 Cultural Administration Research Survey—A Quantitative Evaluation: The Economic and Social Effects of Culture (6)." This survey research was conducted under the supervision and advice of the "Committee for Research Projects for Numerical Evaluation of the Economic and Social Impact of Culture and the Arts" established by Japan's Agency for Cultural Affairs.

The research period extended from September 9, 2022 to March 31, 2023, and the following is the framework.

1. The purpose of this survey

The main theme of "Survey Research for Numerical Evaluation of the Economic and Social Impact of Culture and the Arts" is the estimation of cultural GDP. The results obtained to date are as follows.

FY2017: Feasibility study of cultural GDP estimation (experimental survey)

FY2018: Partial estimation of cultural GDP

FY2019: Coordination with UNESCO and detailed case studies in other countries

FY2020: Overall Estimates of Cultural GDP and Estimates of Employment

FY2021: Research on cultural imports and exports, estimates of cultural GDP and employment (2015-2019), and research on cases of utilization of cultural satellite accounts in other countries

With the completion of the above surveys, it can be said that the initial framework of the Cultural Satellite Account (CSA), which combines cultural GDP, cultural employment, and cultural imports and exports based on the UNESCO guideline, has been established.

Building on these compilations and achievements, this fiscal year we estimated the domestic production value and added value of some of the cultural fields unique to Japan, such as tea ceremony, flower arrangement, calligraphy, Japanese food (*washoku*) culture, kimono culture and "sake"(Japanese rice wine). In addition, we estimated domestic production value-added, employment, and imports and exports in the cultural field from 2015 to 2020. This estimate includes retrospective revisions.

2. Survey content

2.1 Numerical evaluation of Japan-specific culture

The cultural areas targeted for numerical evaluation (GDP estimation) are six fields of life cultures in Japan: tea ceremony, flower arrangement, calligraphy, kimono culture, Japanese food culture and sake.

The method of research for each cultural area was studied and finalized by the Committee for Research Projects.

2.2 Numerical evaluation of cultural areas based on UNESCO guidelines

Last year (2021), when cultural GDP and cultural employment for the five years from 2015 to 2019 were estimated, the extended input-output table for 2019 had not yet been published. Therefore, the cultural GDP estimate for 2019 shows provisional values estimated based on the extended input-output table for 2018.

This year, since the extended input-output table for 2019 has already been published, we estimated Japan's cultural GDP for the six years from 2015 to 2020 using this data.

The 2020 estimate uses the extended input-output table for 2019. For this reason, the 2020 estimates do not fully reflect the impact of the COVID-19 pandemic. Therefore, for 2020, it should be noted that the difference between the provisional and final values may be larger than the previous revisions.

2.3 Research on cultural imports and exports based on UNESCO guidelines

There are three types of statistics on Japan's cultural imports and exports: trade statistics (statistics on goods), balance of payments statistics (statistics on services), and input-output tables (industrial imports and exports).

In our 2020 survey, we mainly used input-output tables, supplementing them with trade statistics and balance of payments statistics that are close to the import and export data recommended by the UNESCO guidelines. We chose this method because 1) trade statistics and balance of payments statistics are based on commodities (goods and services) and their scope is narrow, 2) thus it is difficult to extracting unique cultural products, 3) we put importance on ensuring consistency between cultural GDP estimates and import/export estimates.

In FY2021, we used published input-output tables to estimate cultural imports/exports for the four years from 2015 to 2018. This year (2022), we used the extended input-output table for 2019 to estimate Japan's cultural imports and exports for 2019.

2.4 Proposals for new cultural policies

Based on the challenges identified through three surveys mentioned above, we have drawn up cultural policy proposals.

3. Members of Committee for Research Projects for Numerical Evaluation of the Economic and Social Impact of Culture and the Arts

Tadashi Yagi	Professor, Faculty of Economics, Doshisha University: Cultural Economics
Kiyoshi Fujikawa	Professor, Faculty of Economics, Aichi Gakuin University: Economic Statistics
Haruka Yane	Associate Professor, Faculty of International Relations, Ritsumeikan University: International Economics

(Occupational titles are as of 2022)

Chapter 1 GDP of Japan-specific culture

1. Positioning and methods of estimating GDP for Japan-specific culture

1.1 Positioning

1.1.1 Positioning of UNESCO

UNESCO, in its Universal Declaration on Cultural Diversity (adopted in 2001), defines culture as: “the set of distinctive spiritual, material, intellectual and emotional features of society or a social group and that it encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs.”

The culture of the Cultural Satellite Account (CSA), the subject of this study, is nowhere near as broad in scope as the ideal one described in this Declaration. Since CSA culture is a satellite account of the National Accounts (SNA), it is limited in scope by the framework of the SNA. The 2009 FCS, the CSA guidelines on which the current research study is based, states that the concepts and scope of CSA culture are pragmatic (realistic and practical).

The basic stance of the 2009 FCS is to capture culture, as an aspect of our lives which is inherently rich in diversity and consists of multiple elements, within a common global framework as much as possible so that comparisons can be made across national borders. Furthermore, the 2009 FCS seeks to make its estimates more credible by recognizing common categories (fields) of culture within a limited framework. For this reason, the UNESCO guidelines tend not to include cultural areas that are unique or specific to a country.

1.1.2 The necessity of unique domains and a Japanese CSA

On the other hand, culture, as described in the "Universal Declaration on Cultural Diversity," is diverse and wide-ranging. This is in alignment with our experience of culture in our lives and society. If we limit culture by forcing it into common categories, what is to be done with the reality of cultural practices that exist outside this commonality? CSA as a tool for EBPM, for example, will be limited if it is not adapted to match reality. A CSA which does not match the cultural realities of a country/society is not an effective or meaningful indicator.

In this regard, UNESCO (UIS: UNESCO Institute for Statistics) states the following opinion.

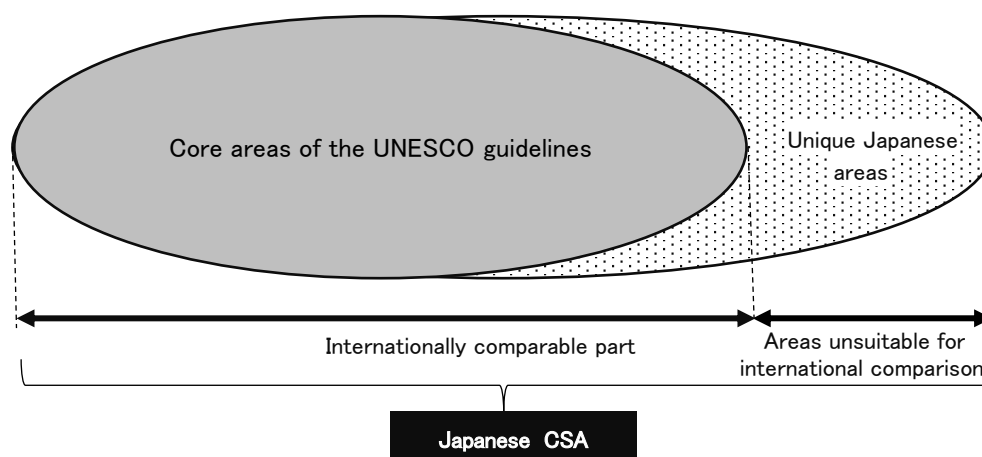
-UNESCO's FCS seeks to be a flexible framework and enhances comparability within certain criteria. At the same time, it aims to help countries build their own cultural frameworks. Therefore, it does not prevent the adoption of FCS's own definition related to each domain of each country or the estimate based on data from each country's own surveys. The estimates of each domain may be used as internationally comparable ones.

-The 2009 FCS does not define or propose any particular fixed indicator. The development of indicators relevant to the framework of cultural indicators is the next important step at national and international levels.

(Source: CDI 2019)

The Japan-specific culture that is the subject of this survey research corresponds to the unique domain of each country referred to by UIS. The aim of this study is to construct a CSA (Japanese CSA: JCSA) that is in line with Japan’s cultural reality by adding unique parts to the core fields of the UNESCO guidelines.

Figure 1-1 The Concept of the Japanese CSA



1.1.3 Position and scope of this year’s research

This year’s survey and research covers six areas of life culture as a part of unique Japanese areas: tea ceremony, flower arrangement, calligraphy, kimono culture, Japanese food culture, and sake. What exactly is the concept and scope of life culture? This has not been clearly defined. The Basic Law on Culture and Arts provides a vague category of “other culture related to lifestyles” in addition to tea ceremony, flower arrangement, calligraphy and Japanese food culture. According to the 2015 Survey of Traditional Life Culture (by Japan’s Agency for Cultural Affairs), traditional etiquette, games (go, shogi, karuta, etc.), literary arts (waka, haiku, etc.), and some martial arts, are covered as traditional life culture. Therefore, it is important to note that the 6 areas of life culture dealt in this survey are just some parts of life cultures in Japan.

It is difficult to estimate the cultural GDP of life culture using the methods and procedures indicated in the UNESCO guidelines, as described below. For this reason, in this survey research, we attempted not only a production side, but also a consumption side approach. It is important to note that the current estimation of cultural GDP for Japan-specific culture is a trial stage measurement.

1.2 Methods of estimating GDP of cultural practices in daily life

1.2.1 Overview

Estimates of cultural GDP are an important aspect of the Cultural Satellite Account (hereinafter referred to as CSA). There are several methods for compiling the CSA, but the 2009 FCS (2009 Framework for Cultural Statistics) presented by UNESCO (mainly by the UNESCO Institute for Statistics: UIS) is currently the internationally accepted guideline.

- (1) Extraction of cultural (specific) products and their production values
- (2) Linking cultural (specific) products to production departments
- (3) Estimation of value added (cultural GDP) (use of input-output table)

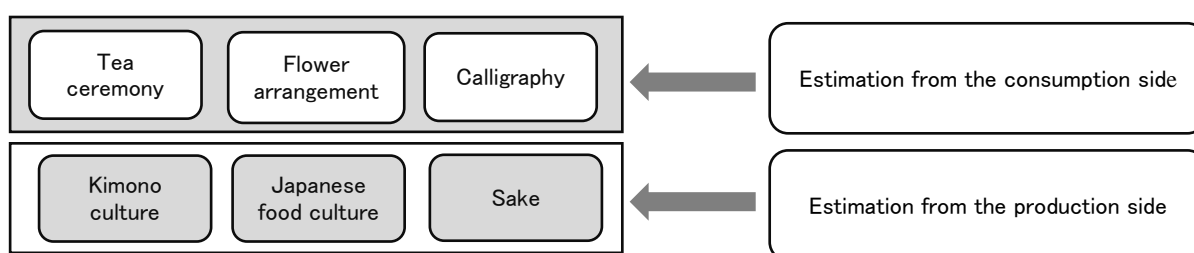
The methods and procedures for estimating cultural GDP begin with understanding the production value of specific products. In other words, we are approaching estimation from the production side. For this approach to be possible, there must be statistics in which cultural (specific) commodities can be identified and their production values recorded.

In this study, we attempt to estimate cultural GDP from each of the six fields of life culture (tea ceremony, flower arrangement, calligraphy, kimono culture, Japanese food culture, and sake). Although kimono culture, Japanese food culture, and sake can be approached from the production side, we encountered difficulties in approaching the remaining three fields of tea ceremony, flower arrangement, and calligraphy from the production side as described below.

- (1) (Specific) Cultural products can be identified, but they are such specialized products that their production volume is either too small or difficult to measure. (For example: tea whisks, tea scoops, tea spoons, etc. specific to tea ceremony, frogs for flower arrangement, etc.)
- (2) It is difficult to distinguish between products used in general life and those used for cultural practices. (For example, statistically, it is not possible to distinguish between tea bowls and flower arrangement basins for cultural practices and bowls and other ceramic tableware for daily use.)

For this reason, for the three fields of tea ceremony, flower arrangement, and calligraphy, we produced an estimation from the consumption (demand) side, not from the production side, as described in the next section.

Figure 1-2 Approach to estimating cultural GDP of cultural practices

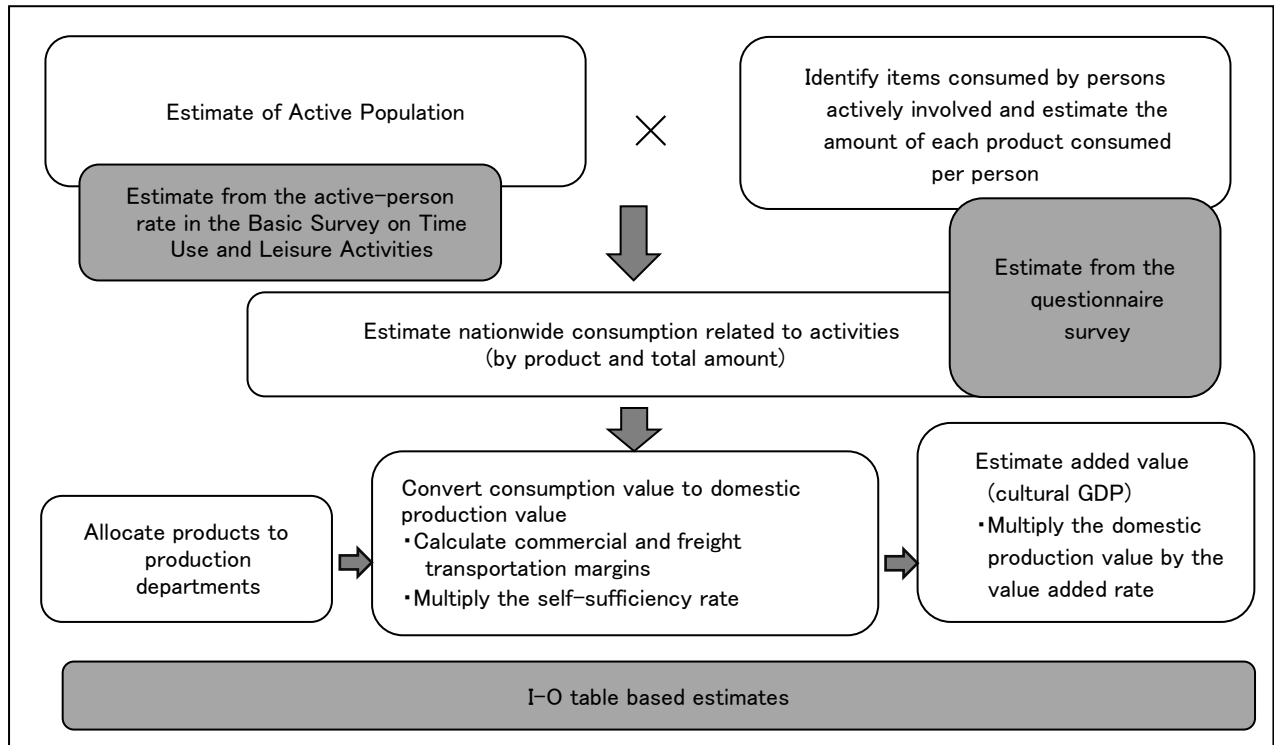


1.2.2 Estimation method for tea ceremony, flower arrangement, and calligraphy (approach from the consumption (demand) side)

Methodology framework

Cultural GDP in the three fields of tea ceremony, flower arrangement, and calligraphy is estimated using the following common methods and procedures.

Figure 1-3 Procedure for estimating cultural GDP for tea ceremony, flower arrangement, and calligraphy



Active population estimation

Data from the Basic Survey on Time Use and Leisure Activities of Lifestyle Activities (Ministry of Internal Affairs and Communications) is used. This survey is conducted with the aim of obtaining basic materials that clarify the actual state of people’s social lives, such as the allocation of time spent on various activities during daily life and the main activities during leisure time. (It has been conducted every five years since 1976.) The current survey uses the results of the 2021 survey (10th survey).

Through this survey, it is possible to know the percentage of active participants in the fields of tea ceremony, flower arrangement, and calligraphy. By multiplying the population of Japan by this active-person statistic, the total number of persons active in each field can be estimated.

However, the following points should be noted.

- (1) The sample size for the Basic Survey on Time Use and Leisure Activities is approximately 180,000 to 190,000 people. Attributes are men and women aged 10 and over. The questionnaire survey we

conducted, which will be described later, targets men and women aged 20 and over, and does not target people aged 10 to 19. Although there is a difference in the sample configuration in this respect, it has been omitted. (The population of Japan aged 10 to 19 accounts for 9.7% of the population aged 10 and over)

- (2) In the survey on “time spent” and “daily activities” in the Basic Survey on Time Use and Leisure Activities of Lifestyle Activities, tea ceremony, flower arrangement, and calligraphy are included in the “hobbies and entertainment” behavioral category, and respondents are asked about their participation and its frequency, with regard to activities in each category.

However, the questionnaire does not show the specific activities of “tea ceremony,” “flower arrangement,” and “calligraphy,” and the definition of each activity is left to the subjective judgment of the respondents. The category of “hobbies and entertainment” is defined as “something that is done in one’s free time,” and excludes, for example, classes taken at school and teaching as a profession.

- (3) In the 2021 Basic Survey on Time Use and Leisure Activities of Lifestyle Activities, it asked whether or not respondents had “participated in the activity in the past year” and “how often.” The “past year” is defined as October 20, 2020 to October 19, 2021. In this study, this period is regarded as 2021 (calendar year) activity.

Consumed products and consumption amount per person (questionnaire survey)

The questionnaire survey samples were men and women aged 20 and over who had come into contact with tea ceremony, flower arrangement, or calligraphy in some way (people who enjoyed, studied, or taught) in the past year. The sample size for each category (tea ceremony, flower arrangement, and calligraphy) was approximately 800 and the activity rate composition was as close as possible to that of the Basic Survey on Time Use and Leisure Activities of Lifestyle Activities.

In the questionnaire survey, we asked about activity frequency and amounts of products consumed (purchased) in one year. And, a product list was shown in advance, and descriptive responses were requested. The product list was created through interviews with tea ceremony, flower arrangement, and calligraphy masters, teachers, and enthusiasts.

The products are classified into “core products (tea ceremony utensils, calligraphy brushes, inks, inkstones, etc.)” and “related products” (tuition fees, membership fees, specialized magazine and other publication subscriptions, transportation expenses, etc.).

Estimation of value added (cultural GDP) using I-O tables

After linking the products (including services) necessary for tea ceremony, flower arrangement, and calligraphy activities to industries, we converted product classifications to industry classifications. In addition,

the consumption amount for each product obtained from the questionnaire survey is regarded as the demand amount.¹

We then determined margins for commercial and transportation costs for each industry segment. These costs are not for specific products for tea ceremony, flower arrangement, or calligraphy, but are for support for these activities through distribution. The commercial and freight transport margins are posted collectively in the commercial and transport categories, respectively.

Next, we multiplied the demand amount by the self-sufficiency rate, and excluded the import amount to reveal the amount of domestic production. We estimated the value added (cultural GDP) by multiplying the domestic production value by the value-added rate of each industry. The value-added rate uses the extended input-output table for 2019.

¹Because membership fees, tuition fees, and training fees may include matcha and sweets for tea ceremony, flower materials for flower arrangement, calligraphy paper and ink for calligraphy, etc. duplication may exist. It is difficult to eliminate such duplication from the results of this questionnaire survey. We are aware that some of the items required for lessons, etc. have been counted twice.

2. Estimations of cultural GDP by category

2.1 Cultural GDP of tea ceremony (Trial estimation)

2.1.1 Estimation of tea ceremony population

Estimate the tea ceremony population in 2021, from the "tea ceremony participation rate (activity rate)" of the Basic Survey on Time Use and Leisure Activities. It is approximately 919,000 people.

2.1.2 Estimation of tea ceremony consumption

Identify the annual consumption structure and consumption amount of people practicing tea ceremony. (Questionnaire survey sample size: 809 people)

Consumption for tea ceremony activities

Calculate the average amount spent for each product obtained from the questionnaire survey (the amount spent per tea ceremony participant). This average amount is multiplied by the tea ceremony population (919,000 people) to estimate the overall consumption amount.

❶ Tea ceremony population	919,000 people
❷ Annual consumption by tea ceremony activities	approximately 46 billion yen
❸ Annual consumption per tea ceremony population:	approximately 50,000 yen

2.1.3 Allocation to industrial sector

Allocate tea ceremony related consumption products and amounts obtained from the questionnaire survey to the industrial sector.

2.1.4 Estimation of value added (cultural GDP)

Conversion to producer prices

Since the tea ceremony-related consumption amount allocated to each industrial sector includes margins for commercial and transportation costs, the commercial margin rate and the freight transportation margin rate for each industry obtained from the output table of the 2015 I-O table are multiplied to determine the margin. The margin is not a specific tea ceremony product, but is considered to be a related department that supports tea ceremony activities through distribution. The commercial and freight transport margins are posted collectively in the commercial and transport categories, respectively.

After the above process, the producer price is estimated.

Estimation of domestic production value

The domestic production value is estimated by multiplying the producer price by the self-sufficiency rate. The self-sufficiency rate of some industries (indicated with an *) is estimated as 100% self-sufficiency due to the nature of the products.

Table 1-1 Allocation of producer prices to domestic production values (tea ceremony)

Industry classification	a. Producer price (Thousands of yen)	b. Self-sufficiency rate	c. Domestic production value (Thousands of yen) c= a×b
Total.....	45,984,003	—	44,334,868
Core products.....	8,879,447	—	7,230,312
Flowers and plants.....	468,721	0.86771	406,714
Special forest products (includes foraging) ...	190,785	0.856	163,312
Confectionery.....	1,049,892	0.94743	994,699
Foods and Refined sake.....	732,564	0.83847	614,233
Tea and roasted coffee.....	1,440,683	0.9309	1,341,132
Carpets and floor mats.....	75,990	0.64096	48,707
Miscellaneous ready-made textile products...	421,980	0.54309	229,173
Miscellaneous wooden products.....	814,394	0.55715	453,740
Miscellaneous furniture and fixtures.....	263,430	0.86907	228,939
Paper.....	32,610	0.93249	30,408
Miscellaneous pulp, paper and processed paper products.....	169,661	0.93228	158,172
Pottery, china and earthenware.....	799,513	0.55388	442,834
Cast materials (iron) and forged materials (iron)	960,075	0.97613	937,158
Metal containers, fabricated plates and sheet metal.....	230,341	0.96797	222,963
Plumbing accessories, powder metallurgy products and tools.....	76,486	0.65814	50,338
Miscellaneous metal products.....	46,258	0.75659	34,998
Jewelry and adornments.....	36,499	0.13146	4,798
"Tatami" (straw matting) and straw products...	113,934	0.84416	96,179
Miscellaneous manufacturing products.....	955,631	0.80765	771,815
Related products.....	37,104,556	—	37,104,556
Woven fabric apparel.....	2,353,708	*1	2,353,708
Railway transport (passengers)	2,267,632	*1	2,267,632
Bus transport service.....	323,948	*1	323,948
Hired car and taxi transport.....	647,895	*1	647,895
Publications.....	833,163	*1	833,163
Eating and drinking services.....	3,990,298	*1	3,990,298
Beauty shops.....	1,677,175	*1	1,677,175
Supplementary tutorial schools, instruction services for arts, culture and technical skills...	11,167,688	*1	11,167,688
(Commercial margin)	13,154,053	*1	13,154,053
(Freight transportation margin)	688,996	*1	688,996

Estimation of value added (GDP) of tea ceremony

Estimate the value added by multiplying the domestic production value by the value-added rate. The sum total of the value added estimated here is regarded as the cultural GDP of the tea ceremony. The estimated results are as follows.

- Tea ceremony consumption 46 billion yen
- Tea ceremony-related domestic production 44.3 billion yen
- Tea ceremony-related added value (GDP) 27.3 billion yen

Table 1-2 Estimation of cultural GDP (tea ceremony)

Industry classification	Domestic production value (Thousands of yen)	Value-added rate	Value added (Cultural GDP) (Thousands of yen)
Total.....	44,334,868	—	27,344,317
Core products.....	7,230,312	—	2,996,381
Flowers and plants.....	406,714	0.54097	220,020
Special forest products (includes foraging)	163,312	0.45622	74,506
Confectionery.....	994,699	0.39026	388,191
Foods and refined sake.....	614,233	0.30606	187,992
Tea and roasted coffee.....	1,341,132	0.41494	556,489
Carpets and floor mats.....	48,707	0.24307	11,839
Miscellaneous ready-made textile products.....	229,173	0.47654	109,210
Miscellaneous wooden products.....	453,740	0.46036	208,884
Miscellaneous furniture and fixtures.....	228,939	0.40277	92,210
Paper.....	30,408	0.28956	8,805
Miscellaneous pulp, paper and processed paper products.....	158,172	0.45078	71,301
Pottery, china and earthenware.....	442,834	0.46321	205,125
Cast materials (iron) and forged materials (iron)	937,158	0.38411	359,972
Metal containers, fabricated plates and sheet metal.....	222,963	0.47671	106,289
Plumbing accessories, powder metallurgy products and tools	50,338	0.55744	28,060
Miscellaneous metal products.....	34,998	0.51158	17,904
Jewelry and adornments.....	4,798	0.38319	1,839
"Tatami" (straw matting) and straw products.....	96,179	0.41444	39,860
Miscellaneous manufactured products.....	771,815	0.39891	307,885
Related products.....	37,104,556	—	24,347,936
Woven fabric apparel.....	2,353,708	0.42302	995,666
Commerce.....	13,154,053	0.66672	8,770,070
Transport.....	688,996	0.63294	436,093
Railway transport (passengers)	2,267,632	0.65573	1,486,954
Bus transport service.....	323,948	0.66156	214,311
Hired car and taxi transport.....	647,895	0.78545	508,889
Publications.....	833,163	0.4059	338,181
Eating and drinking services.....	3,990,298	0.38579	1,539,417
Beauty shops.....	1,677,175	0.6954	1,166,307
Supplementary tutorial schools, instruction services for arts, culture and technical skills.....	11,167,688	0.79623	8,892,048

2.2 Cultural GDP of flower arrangement (Trial estimation)

2.2.1 Estimation of flower arrangement population

Estimate the flower arrangement population in 2021 from the "flower arrangement participation rate (activity rate)" of the Basic Survey on Time Use and Leisure Activities. It is approximately 1,422,000 people.

2.2.2 Estimation of flower arrangement consumption

Identify the annual consumption structure and consumption amount of flower arrangement participants. (Questionnaire survey sample size: 743 people)

Consumption related to flower arrangement activities

Calculate the average amount spent for each product obtained from the questionnaire survey (the amount spent per person participating in flower arrangement). This average amount is multiplied by the flower arrangement population (1,422,000 people) to estimate the overall consumption amount.

❶ Flower arrangement population	1,422,000 people
❷ Annual consumption by flower arrangement activities	approximately 41.7 billion yen
❸ Annual consumption per flower arrangement population:	approximately 29,300 yen

Allocation to industrial sector

Allocate the consumption products and amounts related to flower arrangement obtained from the questionnaire survey to the industrial sector.

2.2.3 Estimation of value added (cultural GDP)

Conversion to producer prices

Since the flower-arrangement-related consumption amount allocated to each industrial sector includes margins for commercial and transportation costs, the commercial margin rate and the freight transportation margin rate for each industry obtained from the output table of the 2015 I-O table are multiplied to obtain the margin. These are not specific products of flower arrangement, but are considered "related departments" that support flower arrangement activities through distribution. The commercial and freight transport margins are posted collectively in the commercial and transport categories, respectively.

After the above process, the producer price is estimated.

Estimation of domestic production value

The domestic production value is estimated by multiplying the producer price by the self-sufficiency rate. The self-sufficiency rate of some industries (indicated with an *) is estimated as 100% self-sufficiency due to the nature of the products.

Table 1-3 Allocation of producer prices to domestic production values (flower arrangement)

Industry classification	a. Producer price (Thousands of yen)	b. Self- sufficiency rate	c. Domestic production value (Thousands of yen) c= a×b
Total.....	41,715,792	—	40,057,537
Core products.....	8,783,632	—	7,125,377
Flowers and plants.....	5,953,270	0.86771	5,165,712
Gravel and quarrying.....	19,908	0.97677	19,446
Miscellaneous wooden products.....	175,556	0.55715	97,811
Paper textiles for medical use.....	79,848	0.91724	73,240
Miscellaneous pulp, paper and processed paper products.....	80,401	0.93228	74,956
Oil and fat products and surface-active agents	65,800	0.92576	60,915
Gelatin and adhesives.....	40,871	0.90529	37,000
Plastic products.....	420,675	0.86959	365,815
Miscellaneous rubber products.....	46,100	0.87670	40,416
Leather tanning, leather products and fur skins (except leather footwear)	211,920	0.15081	31,960
Miscellaneous glass products.....	109,089	0.66406	72,442
Pottery, china and earthenware.....	371,823	0.55388	205,945
Plumbing accessories, powder metallurgy products and tools.....	526,887	0.65814	346,765
Miscellaneous metal products.....	350,248	0.75659	264,994
"Tatami" (straw matting) and straw products	11,967	0.84416	10,102
Miscellaneous manufacturing products.....	319,269	0.80765	257,858
Related products.....	32,932,160	—	32,932,160
Woven fabric apparel.....	942,471	*1	942,471
Railway transport (passengers)	1,577,709	*1	1,577,709
Bus transport service.....	225,387	*1	225,387
Hired car and taxi transport.....	450,774	*1	450,774
Publications.....	630,360	*1	630,360
Beauty shops.....	1,015,308	*1	1,015,308
Supplementary tutorial schools, instruction services for arts, culture and technical skills... (Commercial margin)	15,656,220	*1	15,656,220
(Freight transportation margin)	11,692,017	*1	11,692,017
	741,914	*1	741,914

Estimation of value added (GDP) of flower arrangement

Estimate the value added by multiplying the domestic production value by the value-added rate. The sum total of the value added estimated here is regarded as the cultural GDP of the flower arrangement.

The estimation results are as follows.

- Flower arrangement consumption 41.7 billion yen
- Flower arrangement-related domestic production 40.1 billion yen
- Flower arrangement-related added value (GDP) 27.3 billion yen

Table 1-4 Estimation of cultural GDP (flower arrangement)

Industry classification	Domestic production value (Thousands of yen)	Value-added rate	Value added (Cultural GDP) (Thousands of yen)
Total.....	40,057,537	—	27,293,251
Core products.....	7,125,377	—	3,664,100
Flowers and plant.....	5,165,712	0.54097	2,794,495
Gravel and quarrying.....	19,446	0.49884	9,700
Miscellaneous wooden products.....	97,811	0.46036	45,028
Paper textile for medical use.....	73,240	0.30883	22,619
Miscellaneous pulp, paper and processed paper products.....	74,956	0.45078	33,789
Oil and fat products and surface-active agents.....	60,915	0.32386	19,728
Gelatin and adhesives.....	37,000	0.35628	13,182
Plastic products.....	365,815	0.3505	128,218
Miscellaneous rubber products.....	40,416	0.50122	20,257
Leather tanning, leather products and fur skins (except leather footwear)	31,960	0.41264	13,188
Miscellaneous glass products.....	72,442	0.44979	32,584
Pottery, china and earthenware.....	205,945	0.46321	95,396
Plumbing accessories, powder metallurgy products and tools.....	346,765	0.55744	193,301
Miscellaneous metal products.....	264,994	0.51158	135,566
"Tatami" (straw matting) and straw products.....	10,102	0.41444	4,187
Miscellaneous manufacturing products...	257,858	0.39891	102,862
Related products.....	32,932,160	—	23,629,151
Woven fabric apparel.....	942,471	0.42302	398,684
Commerce.....	11,692,017	0.66672	7,795,302
Transport.....	741,914	0.63294	469,587
Railway transport (passengers)	1,577,709	0.65573	1,034,551
Bus transport service.....	225,387	0.66156	149,107
Hired car and taxi transport.....	450,774	0.78545	354,060
Publication.....	630,360	0.40590	255,863
Beauty shops.....	1,015,308	0.69540	706,045
Supplementary tutorial schools, instruction services for arts, culture and technical skills.....	15,656,220	0.79623	12,465,952

2.3 Cultural GDP of calligraphy (Trial estimation)

2.3.1 Estimation of calligraphy population

Estimate the Calligraphy population in 2021, from the "calligraphy participation rate (activity rate)" in the Basic Survey on Time Use and Leisure Activities. It is approximately 3,814,000 people.

2.3.2 Estimation of calligraphy consumption

Identify the annual consumption structure and consumption amount of people who are doing calligraphy. (Questionnaire survey sample size: 729 people)

Consumption for calligraphy activities

Calculate the average amount spent for each product obtained from the questionnaire survey (the amount spent per person participating in the calligraphy). Furthermore, this average amount is multiplied by the calligraphy population (3,814,000 people) to estimate the overall consumption amount.

❶ Calligraphy population	3,814,000 people
❷ Annual consumption by flower calligraphy activities	approximately 105.7 billion yen
❸ Annual consumption per calligraphy population:	approximately 27,700 yen

Allocation to industrial sector

Allocate the consumption products and amounts related to the calligraphy obtained from the questionnaire survey to the industrial sector.

2.3.4 Estimation of value added (cultural GDP) of calligraphy

Conversion to producer prices

Since the calligraphy-related consumption amount allocated to each industrial sector includes margins for commercial and transportation costs, the commercial margin rate and the freight transportation margin rate for each industry obtained from the output table of the 2015 I-O table are multiplied to get the margin. These are not specific calligraphy products, but are considered related departments that support calligraphy activities through distribution. The commercial and the freight transportation margins are posted collectively in the commercial and transport categories, respectively.

After the above process, the producer price is estimated.

Estimation of domestic production value

Estimate the domestic production value by multiplying the producer price by the self-sufficiency rate. The self-sufficiency rate of some industries (indicated with an *) is estimated as 100% self-sufficiency due to the nature of the products.

Table 1-5 Allocation of producer prices to domestic production values (calligraphy)

Industry classification	a. Producer price (Thousands of yen)	b. Self- sufficiency rate	c. Domestic production value (Thousands of yen) c= a×b
Total.....	105,701,196	—	99,341,765
Core products.....	21,933,507	—	15,574,076
Miscellaneous wooden products.....	660,810	0.55715	368,170
Miscellaneous furniture and fixtures.....	267,654	0.86907	232,610
Paper.....	2,705,544	0.93249	2,522,893
Plastic products.....	167,968	0.85260	143,209
Pottery, china and earthenware.....	709,325	0.55388	392,881
Miscellaneous ceramic, stone and clay products.....	1,725,331	0.81409	1,404,575
Cast and forged materials (iron)	66,006	0.97613	64,430
Plumbing accessories, powder metallurgy products and tools.....	177,544	0.65814	116,849
Miscellaneous metal products.....	53,268	0.75659	40,302
Stationery.....	14,773,545	0.66214	9,782,155
Miscellaneous manufacturing products...	626,512	0.80765	506,002
Related products.....	83,767,689	—	83,767,689
Railway transport (passengers)	4,405,170	*1	4,405,170
Bus transport service.....	629,310	*1	629,310
Hired car and taxi transport.....	1,258,620	*1	1,258,620
Publication.....	4,167,410	*1	4,167,410
Miscellaneous amusement and recreation services.....	1,998,536	*1	1,998,536
Supplementary tutorial schools, instruction services for arts, culture and technical skills.....	45,802,326	*1	45,802,326
(Commercial margin)	24,076,798	*1	24,076,798
(Freight transportation margin)	1,429,519	*1	1,429,519

Estimation of value added (GDP) of calligraphy

Estimate the value added by multiplying the domestic production value by the value-added rate. The sum total of the value added estimated here is regarded as the cultural GDP of calligraphy.

The estimation results are as follows.

- Calligraphy consumption 105.7 billion yen
- Calligraphy-related domestic production 99.3 billion yen
- Calligraphy-related added value (GDP) 67.7 billion yen

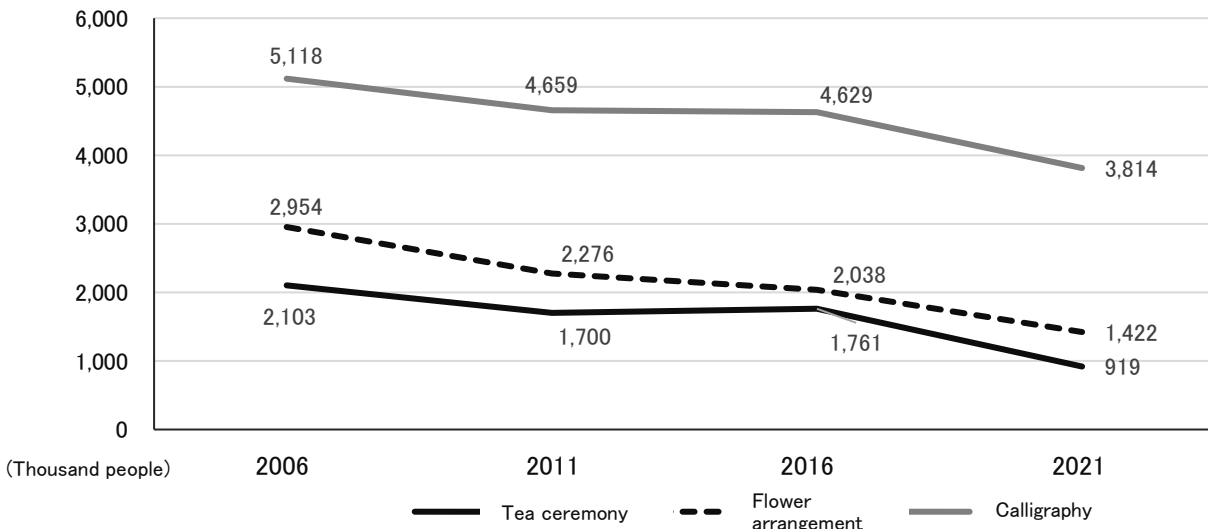
Table 1-6 Estimation of cultural GDP (calligraphy)

Industry classification	Domestic production value (Thousands of yen)	Value added rate	Value added (Cultural GDP) (Thousands of yen)
Total.....	99,341,765	—	67,712,572
Core products.....	15,574,076	—	6,930,784
Miscellaneous wooden products.....	368,170	0.46036	169,491
Miscellaneous furniture and fixtures.....	232,610	0.40277	93,688
Paper.....	2,522,893	0.28956	730,529
Plastic products.....	143,209	0.3505	50,195
Pottery, china and earthenware.....	392,881	0.46321	181,986
Miscellaneous ceramic, stone and clay products.....	1,404,575	0.55586	780,747
Cast and forged materials (iron)	64,430	0.38411	24,748
Plumbing accessories, powder metallurgy products and tools.....	116,849	0.55744	65,136
Miscellaneous metal products.....	40,302	0.51158	20,618
Stationery.....	9,782,155	0.47145	4,611,797
Miscellaneous manufactured products...	506,002	0.39891	201,849
Related products	83,767,689	—	60,781,788
Commerce.....	24,076,798	0.66672	16,052,483
Transport.....	1,429,519	0.63294	904,800
Railway transport (passengers)	4,405,170	0.65573	2,888,602
Bus transport service.....	629,310	0.66156	416,326
Hired car and taxi transport.....	1,258,620	0.78545	988,583
Publication.....	4,167,410	0.40590	1,691,552
Miscellaneous amusement and recreation services.....	1,998,536	0.68563	1,370,256
Supplementary tutorial schools, instruction services for arts, culture and technical skills.....	45,802,326	0.79623	36,469,186

■Column 1: Trends in tea ceremony, flower arrangement, calligraphy population and spending

The active tea ceremony, flower arrangement, and calligraphy populations have been declining over the past 15 years. Therefore, it seems that the cultural GDP of these cultural practices is decreasing.

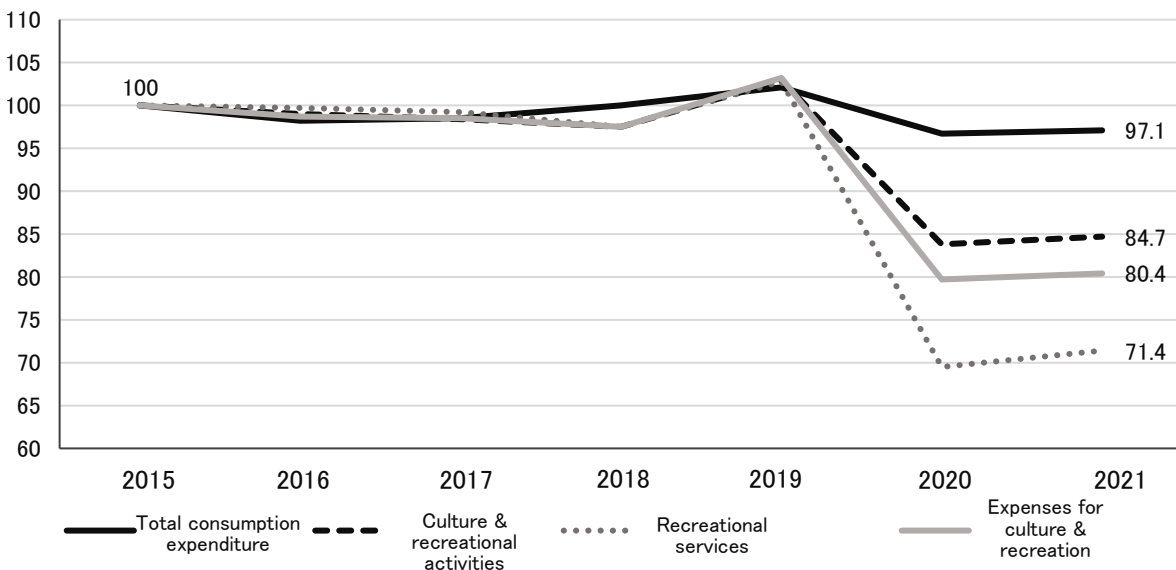
Figure 1-4 Changes in the tea ceremony, flower arrangement, and calligraphy population



(Source: Social Life Basic Survey (Ministry of Internal Affairs and Communications))

In addition, due to the impact of COVID-19, overall consumer spending has decreased since 2020, and the rate of decrease in cultural spending is particularly large. This is thought to be the cause of the spending decrease in the fields of tea ceremony, flower arrangement, and calligraphy.

Figure 1-5 Changes in consumption expenditure and culture & recreation expenditure



Note: "2015 spending" as 100

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

2.4 Cultural GDP of kimono (Japanese clothing) culture (Trial estimation)

2.4.1 Method

Using I-O table (2015 base year survey) data, the following methods were used for estimation.

- (1) In the I-O table (2015 base year survey), the sub-categories of woven fabric apparel include “ready-made kimono and obi belt (sewn products),” ““tabi”-socks (including similar products and semi-finished products),” and “other kimono products (including knitwear).” Since these three items are the most closely related to kimono products, they are included in the estimate as kimono products.
- (2) From 2016 onwards, the I-O table is an extended I-O table that does not categorize sub-items and group items together as “textile clothing.”

Table 1-7 Domestic production value of 3 kimono items

Minor Classification	Detailed classification	Domestic production value (Millions of yen)
Woven fabric apparel	Total	883,489
	Suit jackets.....	30,790
	Suit pants.....	7,443
	Overcoats.....	1,547
	Uniform jackets and overcoats.....	6,459
	Uniform trousers.....	2,802
	One-piece suit jacket.....	23,945
	(Omission)	(Omission)
	(subtotal)	31,788
	Ready-made Japanese kimono and obi belt (sewed items)	24,679
“Tabi”-socks (including similar products and semi-finished products)	1,826	
Other kimono products (including knit products)	5,283	
	(Omission)	(Omission)

(Source: I-O Table (2015) Ministry of Internal Affairs and Communications)

- (3) In addition to the production value data in the I-O table, there is annual statistical data on the size of the kimono market, “Survey on Kimono Market Size 2022” (Kimono to Hosityoku Co., Ltd.: 2022). Based on this data, it is possible to extend and estimate the figures of the 2015 I-O table.

Table 1-8 Changes in kimono market size

Item	2015	2016	2017	2018	2019	2020	2021
Market size (100 Millions of yen)	2,900	2,890	2,880	2,875	2,830	2,780	2,446
Ratio to 2015	1.00000	0.99655	0.99310	0.99138	0.97586	0.95862	0.84345

(Source: Survey on Kimono Market Size 2022 (Kimono to Hosityoku Co., Ltd.: 2022))

2.4.2 Estimation

Based on the 2015 I-O table sub-classified production value, and considering changes in the kimono market, the production value of the three kimono items for each year is extended and estimated. The value added is estimated by multiplying this production value by the value-added rate of woven clothing. (Figures for 2020 and 2021 are estimated using the value-added rate of 2019.)

Table 1-9 Changes in kimono domestic production value and value added

Item	2015	2016	2017	2018	2019	2020	2021
Domestic production value of ready-made kimono, obi, tabi, and other kimono products (Millions of yen)							
.....	31,788	31,678	31,569	31,514	31,021	30,473	26,812
Value-added rate of textile clothing.....	0.41133	0.43014	0.44236	0.43167	0.42302	0.42302	0.42302
Value added (Millions of yen)	13,075	13,626	13,965	13,604	13,123	12,891	11,342
...							

(Source: Input-Output Table (2015) Ministry of Internal Affairs and Communications), Survey on Kimono Market Size 2022 (Kimono to Hosyoku Co., Ltd.: 2022))

Based on the above, the cultural GDP of kimono culture in 2019 is estimated to be approximately 26.8 billion yen in domestic production value and approximately 11.3 billion yen in value added.

【Appendix A Estimation from household survey (Kimono culture)】

1. Subject of estimation

In the Annual Report of the Family Income and Expenditure Survey, there are two categories of expenditure, "kimono" and "clothing rent." The GDP of kimono culture can be estimated from these expenditures (consumption amounts).

2. Kimono

Table 1-10 Annual expenditure of total households (Kimono)

Year	a. Number of households (Thousand households)	b. Kimono expenditure per household (Yen)	c. Total household expenditure (Millions of yen) $c=a \times b$
2014	55,952	2,870	160,582
2015	56,412	2,366	133,471
2016	56,951	1,563	89,014
2017	57,477	2,168	124,610
2018	58,008	1,663	96,467
2019	58,527	1,632	95,516
2020	59,072	1,083	63,975
2021	59,497	1,527	90,852

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

An annual margin for the commercial and transportation costs of the Japanese kimono industry (included in woven clothes) is extracted from total household expenditures. The kimono store, which handles the distribution of kimono, is regarded as a related sector of the kimono industry, and its commercial margin is recorded separately in the commercial category. The freight transportation margin is recorded separately in the transportation category and the domestic production value is an estimate.

The margin rate uses the statistics for woven clothes from the 2015 I-O table. The self-sufficiency rate for woven clothes, commerce, and transportation is assumed to be 100%.

Table 1-11 Estimation of domestic production value of kimono

Year	a. Total household expenditure (Millions of yen)	b. Commercial margin (Margin rate: 0.57051)	c. Freight transportation margin (Margin rate: .02062)	d. Domestic production value of kimono (Millions of yen) $d=a-(b+c)$
2014	160,582	91,614	3,311	65,657
2015	133,471	76,146	2,752	54,573
2016	89,014	50,784	1,835	36,395
2017	124,610	71,091	2,569	50,950
2018	96,467	55,036	1,989	39,442
2019	95,516	54,493	1,970	39,053
2020	63,975	36,498	1,319	26,158
2021	90,852	51,832	1,873	37,147

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications), Input-Output Table (2015) Ministry of Internal Affairs and Communications)

The value-added rate of kimono is considered to be the same as the value-added rate of woven clothes. The value added is estimated by multiplying the production value of kimonos by this rate. In addition, the commercial margin is multiplied by the value-added rate of commerce, and the transportation margin is multiplied by the value-added rate of transportation to estimate value added. The rate for 2014 is estimated using the value-added rate of 2015, and the rates for 2020/2021 are estimated using the value-added rate from 2019.

Table 1-12 Estimation of value added (GDP) of kimono

(Millions of yen)				
Year	a. Value added of kimono	b. Commercial margin value added	c. Transportation margin value added	d. Kimono overall value added d=a+b+c
2014	27,007	61,835	2,070	90,912
2015	22,448	51,395	1,720	75,563
2016	15,655	34,303	1,162	51,120
2017	22,538	48,019	1,615	72,172
2018	17,026	37,068	1,247	55,341
2019	16,520	36,332	1,247	54,099
2020	11,065	24,334	835	36,234
2021	15,714	34,557	1,185	51,456

Based on the above, the cultural GDP of kimono culture in 2021 is estimated to be approximately 90.9 billion yen in domestic production value and 51.5 billion yen in value added (cultural GDP).

Compared to 2014, both the most recent production value and value added have almost halved.

3. Charges for clothing rent

Kimono rentals are often used for coming-of-age ceremonies, graduation ceremonies, and sightseeing. However, it is important to note that the consumption category of Charges for clothing rent includes both kimono and western clothing rental, for it is difficult to divide this expense item into kimono and western clothing as both can be rented from the same shops.

Table 1-13 Annual expenditure of total households (Charges for clothing rent)

Year	a. Number of households (Thousand households)	b. Charges for clothing rent per household (Yen)	c. Total household expenditure (Millions of yen) c=a×b
2014	55,952	720	40,285
2015	56,412	926	52,238
2016	56,951	1,042	59,343
2017	57,477	1,170	67,248
2018	58,008	1,176	68,217
2019	58,527	1,074	62,858
2020	59,072	781	46,135
2021	59,497	868	51,643

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

The amount of Charges for clothing rent paid by all households is taken as the domestic production value of kimono rental, and the value added is estimated by multiplying it by the value-added rate of goods rental and leasing (except car rental). The rate for 2014 is estimated using the value-added rate of 2015, and the rates for 2020/2021 are estimated using the value-added rate of 2019.

Table 1-14 Estimation of value added (GDP) of kimono rent

Year	a. Domestic production value (Millions of yen)	b. Value-added ratio of goods rental and leasing (Except car rental)	c. Value added (Millions of yen)
2014	40,285	0.65106	26,228
2015	52,238	0.65106	34,010
2016	59,343	0.63986	37,971
2017	67,248	0.63189	42,493
2018	68,217	0.63078	43,030
2019	62,858	0.63998	40,228
2020	46,135	0.63998	29,525
2021	51,643	0.63998	33,050

Based on the above, the cultural GDP of the kimono rental sector in kimono culture is estimated to be approximately 51.6 billion yen in domestic production value and 33 billion yen in value added (cultural GDP) in 2021. A downward trend was observed over the last two years.

2.5 Cultural GDP of Japanese food culture (Trial estimation)

2.5.1 Method

Based on the “Economic Census – Activity Survey” data, the following methods were used for estimation.

In the economic census (activity survey), there are categories of "Japanese restaurants," "Ryotei"(Special Japanese restaurants) , "soba" and "udon"(Japanese noodles) restaurants, " and "sushi" bars," and the sales of each type can be identified. The value added was estimated by considering this sales amount as the production amount.

2.5.2 Estimation

In the "2016 Economic Census - Activity Survey Confirmed Totals (Totals Concerning Business Establishments)," the sales figures for each subcategory of restaurants are listed. Of these, four categories, “7621 Japanese restaurants,” “7622 “Ryotei” Special Japanese restaurants ,” “7631 “soba” and “udon”(Japanese noodles) restaurants,” and “7641 “Sushi” bars" are considered to correspond to “Japanese cuisine.”

The items listed, including sales for each subcategory, are as follows.

Table 1-15 The amounts of sales of restaurants (subcategory)

Subcategory (Japanese cuisine)	Number of establishments	Number of employees	Sales (income) amount (Millions of yen)
Total.....			4,324,832
7621 Japanese restaurants.....	44,800	447,783	2,274,085
7622 “Ryotei”(Special Japanese restaurants)	673	5,503	31,087
7631 “Soba” and “udon” (Japanese noodles) restaurants.....	27,095	189,515	802,857
7641 “Sushi” bars.....	21,132	244,296	1,216,803

(Source: 2016 Economic Census - Activity Survey Confirmed Totals (Totals Concerning Business Establishments)(Ministry of Internal Affairs and Communications)

The 2016 survey is a base year survey conducted every five years, and shows the sales amount for 2015. From 2016 onwards, only the figures for the entire “eating and drinking places ” category (domestic production value) in the input-output table (base year/extended table) are shown and not the figures for the subcategories.

Therefore, with 2015 as the base year, we estimate sales amounts by assuming that the growth rates of the Japanese food restaurants (the above four subcategories) are the same as that of eating and drinking places as a whole.

Table 1-16 Growth rate of domestic production value of eating and drinking places in the input-output table
(Base year table/extended table)

Year	Domestic production value (Millions of yen)	Ratio to 2015
2015	24,108,890	1.00000
2016	24,205,992	1.00403
2017	24,387,301	1.01155
2018	24,334,944	1.00938
2019	23,882,110	0.99059

(Source: "Input-Output Table (Base Year Table)" (Ministry of Internal Affairs and Communications) "Input-Output Table (Extended Table)" (Ministry of Economy, Trade and Industry)

The value added is estimated by multiplying this sales amount by the value-added rate of eating and drinking places for each year.

Table 1-17 Estimation of domestic production value of Japanese restaurants

Year	Ratio of domestic production value of eating and drinking places (input-output table) to 2015 Sales of Japanese food	Japanese food sales (Millions of yen) (Economic Census 2015 base)	Value-added rate	Value added (Millions of yen)
2015	1.00000	4,324,832	0.37681	1,629,640
2016	1.00403	4,342,261	0.38246	1,660,741
2017	1.01155	4,374,784	0.38505	1,684,511
2018	1.00938	4,365,399	0.37707	1,646,061
2019	0.99059	4,284,135	0.37525	1,607,622

Based on the above, the cultural GDP of Japanese food culture in 2019 is estimated to be approximately 4,284.1 billion yen in domestic production value and approximately 1,607.6 billion yen in value added.

【Appendix B Estimation from household survey (Japanese food culture)】

In the Annual Report of the Family Income and Expenditure Survey, there is an “eating out expenditure” category. Within this category, the sub-categories of “Japanese food,” “Sushi (eating out),” and “soba” and “udon”(Japanese noodles) are regarded as Japanese food culture, and expenditures are estimated.

Next, the I-O table is used to estimate value added.

Table 1-18 Annual expenditure per household (Japanese food)

Year				(Yen)
	“soba” and “udon”(Japanese noodles)	Sushi (eating out)	Japanese food	Total
2014	5,399	12,043	22,313	39,755
2015	5,835	12,254	23,476	41,565
2016	5,486	13,033	22,715	41,234
2017	5,584	12,695	23,079	41,358
2018	5,645	12,806	21,969	40,420
2019	5,712	12,412	21,547	39,671
2020	4,352	10,838	16,701	31,891
2021	4,356	11,110	16,931	32,397

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

Multiply this by the number of households in each year to estimate the amount of consumption.

Table 1-19 Annual expenditure of all households (Japanese food)

Year	a. Number of households (Thousand households)	b. Amount spent on Japanese food per household (Yen)	c. Amount spent by all households (Millions of yen) c=a×b
	2014	55,952	39,755
2015	56,412	41,565	2,344,765
2016	56,951	41,234	2,348,317
2017	57,477	41,358	2,377,135
2018	58,008	40,420	2,344,683
2019	58,527	39,671	2,321,824
2020	59,072	31,891	1,883,864
2021	59,497	32,397	1,927,525

(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

The amount spent by all households is regarded as the amount of domestic production. The value added is estimated by multiplying this amount by the value-added rate of eating and drinking places. The rate for 2014 is estimated using the value-added rate of 2015, and the rates for 2020/2021 are estimated using the value-added rate of 2019.

Table 1-20 Estimation of value added (cultural GDP) from annual expenditure of total households (*washoku*)

Year	a. Japanese food domestic production value (Millions of yen)	b. Value-added ratio of eating and drinking places	c. Value added (Millions of yen) c=a×b
2014	2,224,372	0.37681	838,166
2015	2,344,765	0.37681	883,531
2016	2,348,317	0.38246	898,137
2017	2,377,135	0.38505	915,316
2018	2,344,683	0.37707	884,109
2019	2,321,824	0.37525	871,264
2020	1,883,864	0.37525	706,920
2021	1,927,525	0.37525	723,304

Note: The figures in the table are calculated for each item and rounded off, so the multiplied results may not match the figures listed.

Based on the above, the cultural GDP of Japanese food (*washoku*) culture in 2021 is estimated to be approximately 1,927.5 billion yen in domestic production value and 723.3 billion yen in value added (cultural GDP). Up until 2019, the domestic production value was in the 2,300-billion-yen range and the value added was around 900 billion yen, but it has been declining since 2020.

2.6 Cultural GDP of “Sake”(Japanese rice wine) (Trial Estimation)

2.6.1 Method

Based on the I-O tables data, we estimated the cultural GDP of sake using the annual domestic production value and value-added rate of sake in the I-O table. "Sake"(Japanese rice wine) in the I-O table includes not only refined sake but also “mirin” (sweet sake for cooking) and sake lees.

2.6.2 Estimation

The domestic production value of sake in 2019 is approximately 330 billion yen. The value added (GDP) of sake production, excluding intermediate inputs, is approximately 170 billion yen.

The five-year transition from the production side shows a peak in domestic production value in 2017 at approximately 370 billion yen, and in value added, at approximately 195 billion yen. Both have been on a downward trend since that time.

Table 1-21 Value added of sake

	(Millions of yen)				
	2015	2016	2017	2018	2019
A. Domestic product value.....	350,766	356,365	370,509	350,536	327,170
B. Rate of Value added	0.52014	0.52358	0.52774	0.51884	0.51997
C. Value added (A×B)	182,448	186,586	195,533	181,872	170,118

(Source: Input-Output Table (Extended Table) (Ministry of Economy, Trade and Industry))

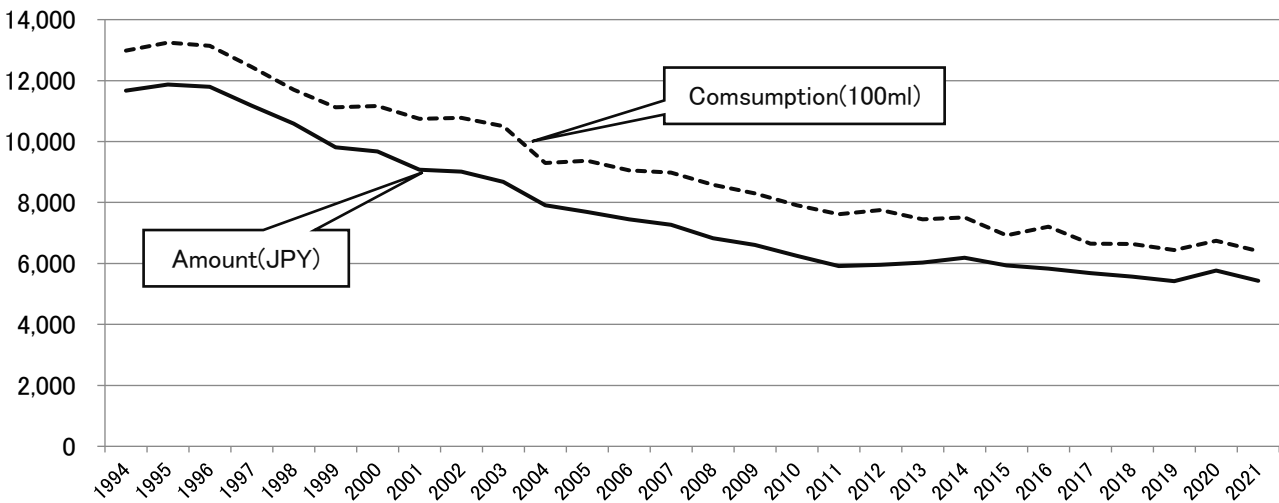
■Column 2: Sake production status and trends

The consumption of sake has been on the decline for the last 20 years, being overtaken by beer, low-malt beer, and other alcoholic beverages. However, in the last three to four years, the consumption amount has been seen to level off. It is said that this is largely due to the rise in prices due to the upscaling of sake products. This is evidenced by the leveling off of shipments of high-end sake.

In addition to sake, people are now showing a preference for a wider variety of alcoholic beverages such as beer, “shochu”(Japanese distilled spirit), wine, and low-malt beer.

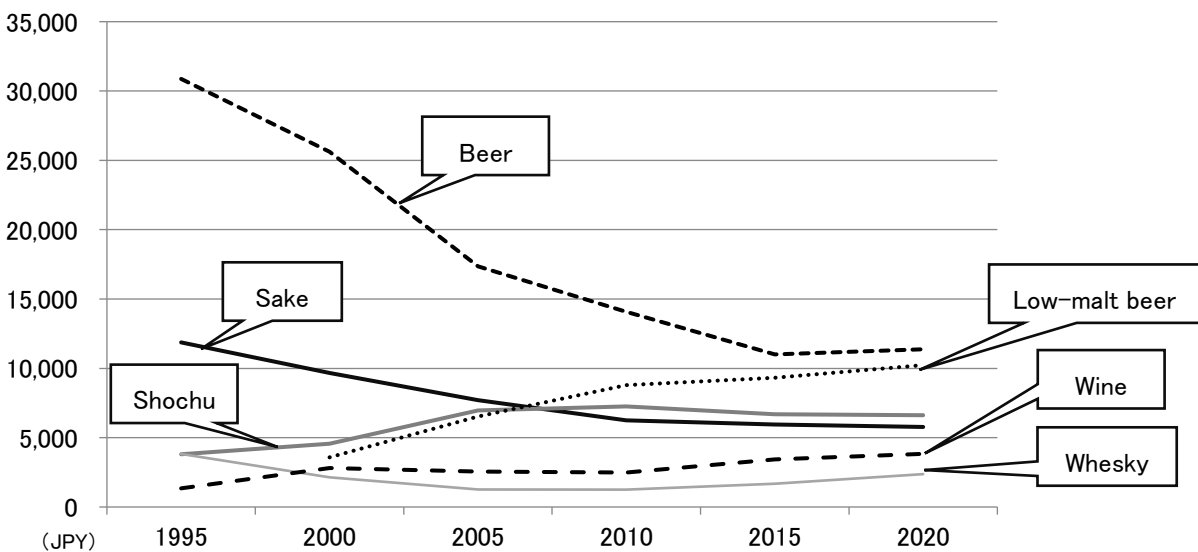
Surprisingly, exported sake is 10 times more expensive than it was 20 years ago, and overseas demand is stimulating domestic production.

Figure 1-6 Trends in sake consumption and amounts consumed (per household with two or more people)



(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

Figure 1-7 Trends in annual consumption of alcoholic beverages (per household with two or more people)



(Source: Family Income and Expenditure Survey Annual Report (Ministry of Internal Affairs and Communications))

Chapter 2 Cultural GDP and employment in cultural industries

1. Methodology

In the current research study, we used the following method to estimate cultural GDP and cultural employment for the six years from 2015 to 2020.

- (1) I-O tables from 2015 to 2019 were used to estimate domestic production, value added (GDP), and employment. The 2015 I-O table is a base-year national table prepared every five years from which it is possible to obtain coefficients for estimating employment as well as margins for commerce and transportation. This table was created through the joint work of 10 ministries and agencies, including the Ministry of Internal Affairs and Communications.

The 2016-2019 I-O table was extended by the Ministry of Economy, Trade and Industry using estimations from the 2015 I-O table (basic table). The domestic production value, which cannot be directly estimated from the I-O table, was estimated using basic data such as that from the economic census.

- (2) Value added was estimated by obtaining a value-added ratio based on the cost composition of the basic transaction category of the I-O table.
- (3) Last year's estimates for 2015 to 2018 are definitive values. At the time of last year's survey, the extended I-O table for 2019 had not yet been released. Therefore, last year's figures for 2019 were estimated by independently extending the 2018 extended industry table, and were provisional figures.

This year, the extended I-O table for 2019 had already been published, so the 2019 data was re-estimated.

- (4) The extended I-O table for 2020 was not published during FY2020. In addition, the 2021 Economic Census Activity Survey (for aggregation categories such as sales (income) amount by business activity), the main source of basic data, has not been released. It is scheduled for June 2023 release. Therefore, figures are provisional values as were the ones for 2019, last year.

Regarding 2020 domestic production values, after excluding financial statements, etc., the domestic production value in 2019, the SNA I-O table for 2019 (second annual estimate) and 2020 (first annual estimate) were used for extrapolation. The value-added rate uses the extended input-output table for 2019.

Therefore, for 2020, it is necessary to update the data using the 2020 extended input-output table scheduled for publication in 2023 and the figures from the 2021 Economic Census Activity Survey.

The 2020 estimate uses the extended input-output table for 2019. For this reason, the 2020 estimates do not fully reflect the impact of the COVID-19 pandemic. Therefore, for 2020, it should be noted that the difference between the provisional and final values may be larger than the previous revisions.

- (5) Cultural GDP for each year from 2015 to 2020 and changes over this six-year period are expressed in nominal values estimated based on actual market trading prices.

(6) Employment figures are estimated based on the employment table of the 2015 I-O table and the domestic production value (basic transaction table).

Table 2-1 Subdomains (industrial sector) of the cultural sector, sector correspondence in the SNA I-O table, and growth rate of domestic production value in 2020

Domain	Sub-domain	Industry sector in SNA	Ratio of 2019 value	
B. Performance/ Celebration	Entertainment facilities (except movie theaters) • Troupe	Services for amusement and recreation.....	0.75699	
	Manufacture of musical instruments	Miscellaneous manufacturing products	0.81188	
	Music software	Video picture, sound information, character information production.....	0.91633	
	Music studio services			
	Music CD rental	Goods rental and leasing (excluding real estate)	0.94937	
C. Visual Arts/ Crafts	Photography	Miscellaneous personal services.....	0.84252	
	Handmade Japanese paper	Pulp, paper and processed paper products	0.92777	
	Ceramic ornaments	Ceramic, stone and clay products	0.91686	
	Painted ceramics			
	Cloisonne products			
	Artificial jewelry			
	Metal sculpture	Metal products.....	0.92549	
	Jewelry made of precious metals Natural and cultured pearl jewelry	Miscellaneous manufacturing products.....	0.81188	
D. Books/Press	Publication	Video picture, sound information, character information production.....	0.91633	
	Newspaper			
	News supply service			
	Book and magazine retail (including used books) Newspaper retail (newspaper store)	Retail trade.....	0.96582	
E. Audio-Visual/ Interactive Media	Video production (excluding animation)	Video picture, sound information, character information production.....	0.91633	
	TV program production (excluding animation)			
	Animation production			
	Distribution of movies, videos and TV programs			
	Radio program production			
	Video studio			
	Post-production			
	Other editing production, sound technology, etc.			
		Video (DVD/Blu-ray) rental	Goods rental and leasing (excluding real estate)	0.94937
F. Design/ Creative Services	Design services			
	Architectural services (including landscape design)	Miscellaneous business services.....	0.95802	
	Advertising services	Advertising services.....	0.85974	
	Advertising production	Video picture, sound information, character information production.....	0.91633	

2. Estimation of Cultural GDP

2.1 Cultural GDP (2015~2020)

Table 2-2 shows the domestic production value (nominal value) of Japanese culture and cultural GDP for the six years from 2015 to 2020. Cultural GDP was found to account for approximately 1.9% of Japan's total GDP.

In the previous year's estimate, the estimated value for 2019 was a provisional value, but since the 2019 input-output table became available, it has been updated as a definitive value. (Table 2-3)

Table 2-2 Domestic production value of Japanese culture (nominal value)

Item	(100 million yen)					
	2015	2016	2017	2018	2019	2020 (provisional)
Domestic production value of the cultural sector.....	247,407	253,051	253,799	253,276	255,497	241,921
Domestic production value...	10,103,743	9,984,540	10,287,585	10,497,680	10,470,826	9,887,091
Gross Domestic Product of the Cultural Sector as a Percentage of Domestic production Value	2.4%	2.5%	2.5%	2.4%	2.4%	2.4%
Gross Domestic Product of the Cultural Sector (Cultural GDP)	100,934	104,939	105,612	104,567	107,498	101,183
Gross domestic product (GDP)	5,380,323	5,443,646	5,530,730	5,566,301	5,579,108	5,390,824
Cultural GDP as a percentage of domestic GDP.....	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%

(Source: National Economic Accounts 2021 (Cabinet Office) for national figures)

Table 2-3 Final value and provisional value of 2019 (nominal value)

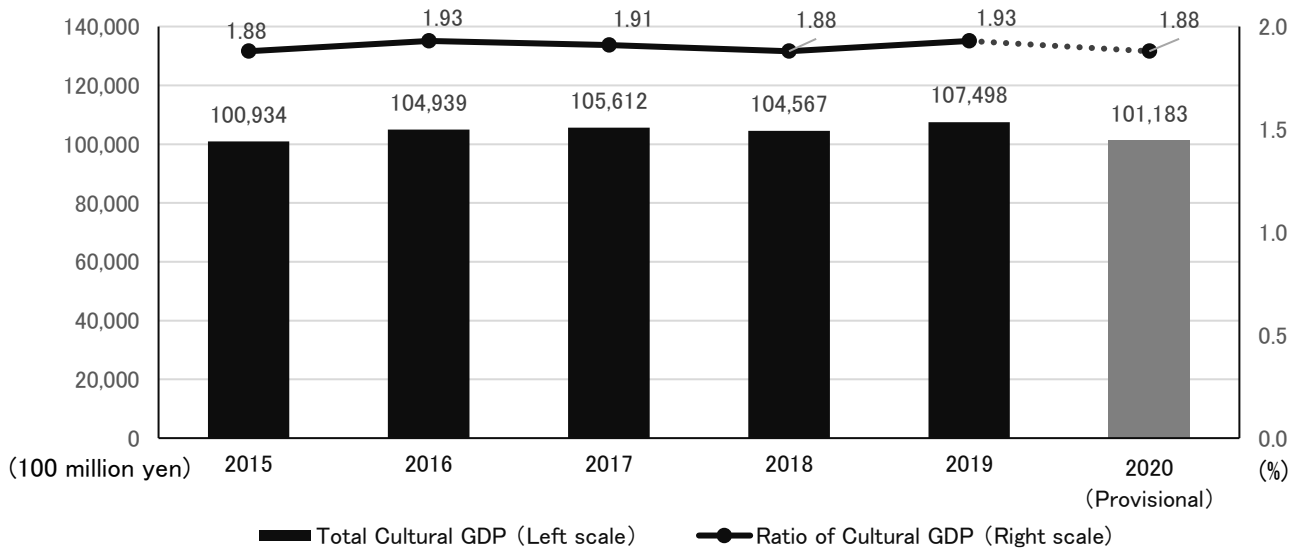
Item	(100 million yen)		
	A. 2019 final value	B. 2019 provisional value	A - B
Domestic production value of the cultural sector.....	255,497	249,807	5,690
Domestic production value.....	10,470,826	10,474,248	-3,422
Gross Domestic Product of the cultural sector as a percentage of domestic production value.....	2.4%	2.4%	—
Gross domestic product of the cultural sector (cultural GDP)	107,498	102,156	5,342
Gross domestic product (GDP)	5,579,108	5,584,912	-5,804
Cultural GDP as a percentage of domestic GDP.....	1.9%	1.8%	—

(Source: National Economic Accounts (Cabinet Office) for national figures)

2.2 Changes in cultural GDP

Cultural GDP (nominal value) from 2015 to 2020 (2020 is a provisional value) has remained at the 10 trillion yen level. In 2020, when economic activity contracted due to the impact of COVID-19, cultural GDP also showed a downward trend, albeit the value is a provisional figure. The ratio of cultural GDP to domestic GDP varies slightly between 1.9% and 1.8%.

Figure 2-1 Changes in cultural GDP (2015-2020) (nominal value)



In terms of changes by domain from 2015 to 2020, value added (cultural GDP) increased in the following domains: A. Cultural/Natural Heritage, E. Audio-Visual/Interactive Media, and F. Design/Creative Services. The domains that decreased were "B. Performance/Celebration," "C. Visual Arts/Crafts," and "D. Books/Press." (Figure 2-2)

Figure 2-2 Changes in GDP by domain (nominal value)

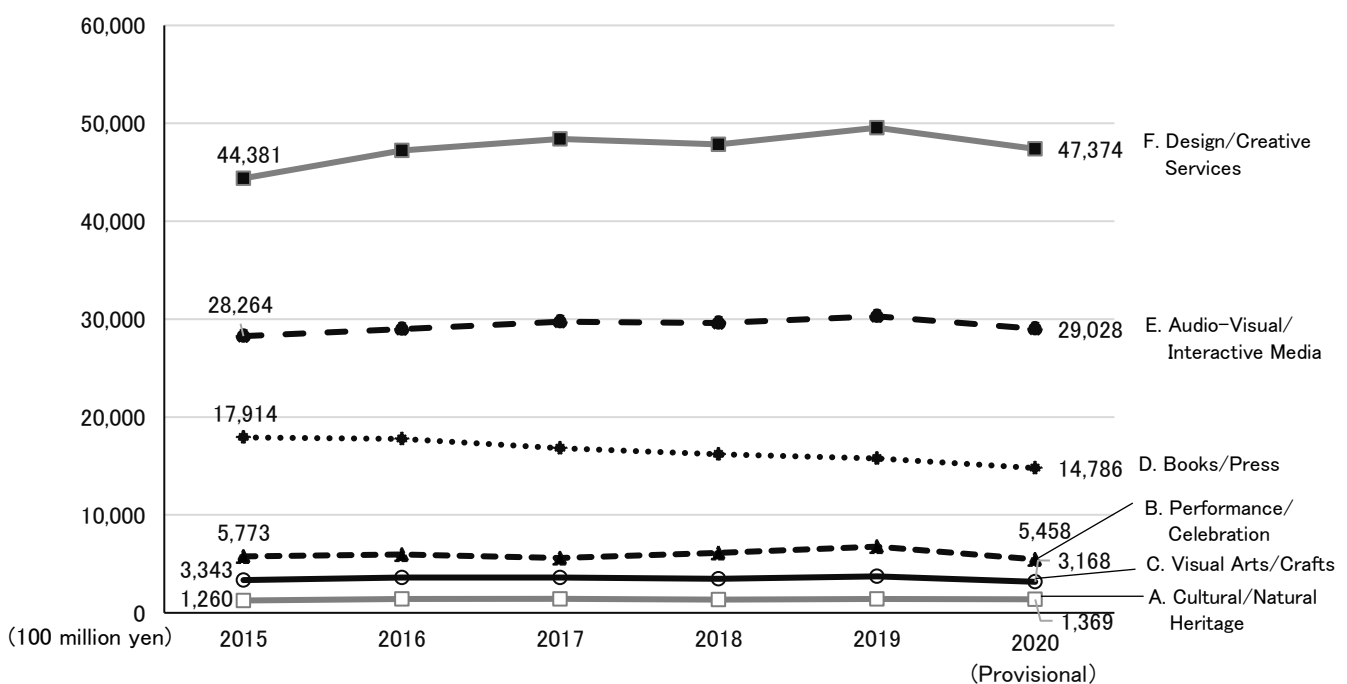


Table 2-4 Changes in value added by domain (nominal value)

(100 million yen)

Domain	2015	2016	2017	2018	2019	2020 (Provisional)
Total	100,934	104,939	105,612	104,567	107,498	101,183
A. Cultural/Natural Heritage.....	1,260	1,422	1,429	1,346	1,410	1,369
B. Performance/Celebration.....	5,773	5,948	5,590	6,121	6,762	5,458
C. Visual Arts/Crafts.....	3,343	3,595	3,615	3,476	3,722	3,168
D. Books/Press.....	17,914	17,777	16,829	16,179	15,771	14,786
E. Audio-Visual/Interactive Media.....	28,264	28,974	29,735	29,609	30,285	29,028
F. Design/Creative Services.....	44,381	47,222	48,413	47,837	49,547	47,374

Table 2-5 Changes in domestic production value by domain (nominal value)

(100 million yen)

Domain	2015	2016	2017	2018	2019	2020 (Provisional)
Total	247,407	253,051	253,799	253,276	255,497	241,921
A. Cultural/Natural Heritage.....	3,258	3,545	3,643	3,547	3,616	3,425
B. Performance/Celebration.....	11,825	11,971	11,366	12,359	13,328	11,109
C. Visual Arts/Crafts.....	5,374	5,755	5,751	5,666	5,930	5,033
D. Books/Press.....	39,631	38,226	35,998	34,658	33,575	31,336
E. Audio-Visual/Interactive Media.....	76,416	78,383	79,656	80,600	81,208	78,354
F. Design/Creative Services.....	110,902	115,171	117,385	116,446	117,840	112,664

2.3 Employment in cultural industries

2.3.1 Methodology

The employment coefficient of the cultural industry sector is calculated from the employment table (employee breakdown table by production activity sector) in the 2015 I-O table and domestic production value. The number of employees (employees) in the cultural sector was estimated by multiplying this by the domestic production value (nominal value) of each cultural sector.

2.3.2 Estimation

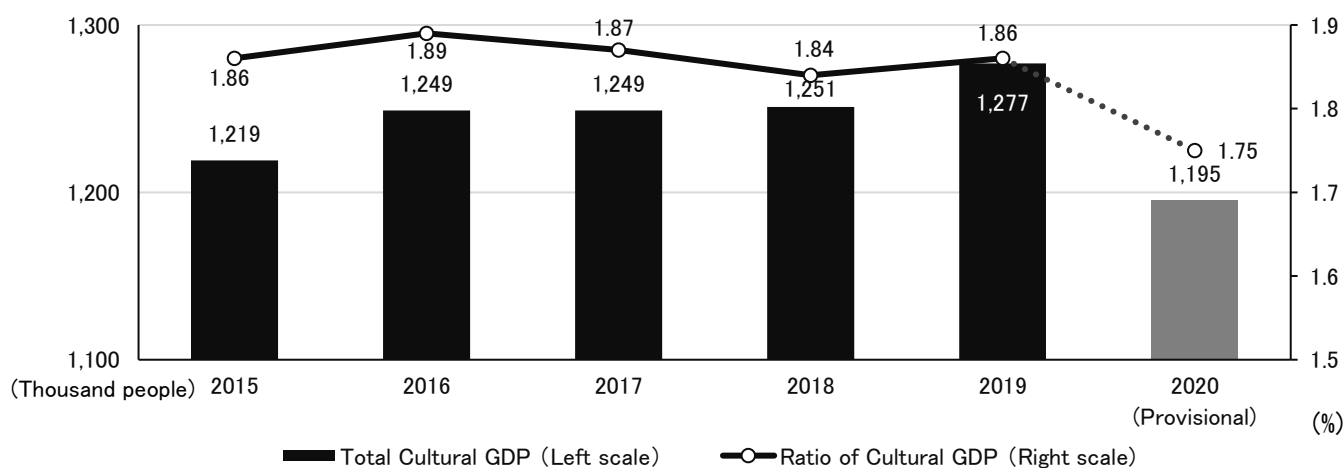
The number of employees in "F. Design/Creative Services" is large in all years. The highest number is 575,000 in 2019. This is followed by "D. Books/Press" and "E. Audio-Visual/Interactive Media" with more than 200,000 employees. In 2015 and 2016, "D. Books/Press" has more employees, but the number of "D. Books/Press" employees is on the decline. Since 2017, the number of employees in "E. Audio-Visual/Interactive Media" has been higher than the number of employees in "D. Books/Press."

Overall culture employs 1.22 million in 2015, 1.25 million in 2016-2018, 1.28 million in 2019, and 1.2 million in 2020 (provisional). Employment in the cultural sector is hovering around 1.8% of the national total.

Table 2-6 Number of employees by domain

Domain	(Thousand people/%)					
	2015	2016	2017	2018	2019	2020 (Provisional)
Total	1,219	1,249	1,249	1,251	1,277	1,195
(Percentage of total employment)	(1.86)	(1.89)	(1.87)	(1.84)	(1.86)	(1.75)
A. Cultural/Natural Heritage.....	32	34	35	34	35	33
B. Performance/Celebration.....	76	77	73	79	85	70
C. Visual Arts/Crafts.....	91	96	96	94	100	85
D. Books/Press.....	260	250	236	233	226	215
E. Audio-Visual/Interactive Media.....	239	245	248	251	257	242
F. Design/Creative Services.....	522	545	560	559	575	550

Figure 2-3 Changes in cultural employment



Chapter 3 Cultural imports and exports

1. Methodology

1.1 Japanese statistics on cultural imports and exports

In estimating cultural imports and exports, the UNESCO guidelines (2009 FCS) recommend two methods: approaching cultural goods according to the HS Code and approaching cultural services according to the EBOPS Code.

According to these guidelines, Japan's import and export statistics correspond to the "Ministry of Finance Trade Statistics" for export and import statistics of cultural goods, and the "Balance of Payments Statistics (Bank of Japan)" for export and import statistics of cultural services.

In Japan, in addition to these two statistics, data on the status of imports and exports by industry is also included in input-output tables. There is an import/export item in the demand section of the input-output table, and the import value and export value for each industry are calculated.

As in the previous year, the current research study will focus mainly on import and export figures from the input-output table, supplemented by Ministry of Finance trade statistics and balance of payments statistics (Bank of Japan).

1.2 Method of cultural product extraction using three statistical sources

The imports and exports of the six domains of cultural GDP in 2009 FCS are calculated as follows using three statistical sources.

Only applicable items are counted. Those indicated "not applicable" are not included in the calculation. If there are multiple data, the data indicated with an * are omitted to avoid duplication.

Table 3-1 List of import/export statistics used by domains/subdomains

Domain	Sub-domain	Data used
A. Cultural/Natural Heritage	(1) National museums	I-O Table: Social education (public institution)
	(2) Public museums	I-O Table: Social education (public institution)
	(3) Private museums	I-O Table: Social education (NPI)
	(4) Cultural property protection	No applicable item
	(5) Natural heritage related	
	Others	Ministry of Finance Trade Statistics: Antique
B. Performance/Celebration	(1) Entertainment facilities (except movie theaters) • Troupe	I-O Table: Performances (except movie theaters), theatrical companies
	(2) Manufacture of musical instruments	I-O Table: Musical instruments Ministry of Finance Trade Statistics: Musical Instruments
	(3) Music software	No applicable item
	(4) Paid music distribution	
	(5) Music software production (Excludes income from sales of CDs, etc.)	
	(6) Music CD rental	
	(7) Independent Administrative Institution Theater, Concert Hall, etc.	
	(8) Public theaters, concert halls, etc.	
C. Visual Arts/Crafts	(1) Purchasing from artists (arts, crafts, calligraphy)	Ministry of Finance Trade Statistics: Paintings, Other visual arts
	(2) Purchasing from artists (photography)	No applicable item
	(3) Photography	I-O Table: Photographic studios Ministry of Finance Trade Statistics: Photography
	(4) Art goods (posters, etc.)	No applicable item
	(5) Works of art	
	(6) Handmade Japanese paper	
	(7) Porcelain figurine	
	(8) Ceramic art	Ministry of Finance Trade Statistics: Jewelry goods
	(9) Cloisonne products	
	(10) Artificial gemstones (including synthetic gemstones, imitation gemstones, artificial pearls, and artificial crystals)	Ministry of Finance Trade Statistics: Jewelry goods
	(11) Metal sculpture	No applicable item
	(12) Jewelry made of precious metals (Including jewels, ivory, tortoiseshell)	
	(13) Natural and cultured pearl jewelry	Ministry of Finance Trade Statistics: Jewelry goods
D. Books/Press	(1) Books	I-O Table: Publication Ministry of Finance Trade Statistics: Publication
	(2) Magazines	I-O Table: Publication Ministry of Finance Trade Statistics: Other publications
	(3) Book and magazine retail business (excluding used books)	No applicable item
	(4) Newspapers	I-O Table: Newspaper
	(5) Newspaper retail (newspaper store)	No applicable item
	(6) News supply service	

Domain	Sub-domain	Data used
	(7) National Diet Library	I-O Table: Social education (public institution)
	(8) Public libraries	I-O Table: Social education (public institution)
E. Audio-Visual/ Interactive Media	(1) Film production and distribution	No applicable item
	(2) movie box office	I-O Table: Movie theaters
	(3) NHK reception fee	I-O Table: Public broadcasting
	(4) commercial terrestrial television broadcasting	I-O Table: Private broadcasting
	(5) satellite broadcasting	
	(6) Cable TV	
	(7) Radio broadcasting	
	(8) Community broadcasting	
	(9) General satellite broadcasting Audio broadcasting	
	(10) TV program production and distribution	
	(11) Radio program production	
	(12) Video (DVD) production and sales	
	(13) Video distribution	
	(14) Post production	
	(15) Game software	
	(16) Online game management	
	(17) Distribution for feature phones	
	(18) Arcade/TV/music game	
	(19) Video (DVD/Blu-ray) rental	
F. Design/Creative Services	(1) Design services	No applicable item
	(2) Architecture services (including landscape design)	I-O Table: Civil engineering and construction services Ministry of Finance Trade Statistics: Architecture and design
	(3) Advertising services	I-O Table: Advertising services
Transverse domains	(1) Other personal, cultural and recreational services	Balance of Payments Statistics (Bank of Japan)
	(2) Usage fee for copyright, etc.	
	(3) Audiovisual and related services	

2. Estimation

From 2015 to 2019, the export value of Japanese culture remained at 1.4 trillion to 2.0 trillion yen, while the import value from 2015 to 2018 was at 2.2 trillion to 2.5 trillion yen. It increased significantly to 3.3 trillion yen in 2019. (Sale price and nominal value)

The ratio of cultural imports and exports to the total amount of imports and exports in the input-output table was 1.6 to 2.2% for exports from 2015 to 2019, and 2.2 to 2.6% for imports from 2015 to 2018. This ratio rose to 3.2% in 2019.

The change in import value in 2019 is mainly due to an increase in imports in the advertising sector.

Table 3-2 Exports and Imports of Japanese Culture (2015-2019)

		(100 million yen)					
Domain	Sub-domain	2015			2016		
		Export value	Import value	Balance of payments	Export value	Import value	Balance of payments
Total		13,793.9	22,551.1	-8,757.2	15,120.0	22,828.5	-7,708.6
Import and Export Total (Based on the I-O Table)		867,694.2	1,021,681.3		808,319.0	878,650.6	
Percentage of total imports and exports (Based on the I-O Table)		1.6%	2.2%		1.9%	2.6%	
A. Cultural/	Subtotal	59.6	78.8	-19.2	51.1	87.0	-35.9
Natural Heritage	Social education (Public)	26.3	0.0	26.3	28.4	0.0	28.4
	Social education (NPI)	10.6	0.0	10.6	11.5	0.0	11.5
	Antique	22.7	78.8	-56.1	11.2	87.0	-75.8
B. Performance/	Subtotal	1,327.7	1,448.5	-120.8	1,366.2	1,371.1	-4.9
Celebration	Entertainment facilities (except movie theaters)•Troupe	792.2	814.6	-22.4	885.5	769.8	115.7
	Manufacture of musical instruments	535.5	633.9	-98.4	480.7	601.3	-120.6
	Subtotal	2,882.6	3,036.7	-154.1	3,366.2	3,008.3	357.9
C. Visual Arts/Crafts	Paintings	315.3	380.7	-65.4	312.4	363.0	-50.6
	Other visual arts	116.4	465.2	-348.8	141.4	474.4	-333.0
	Jewelry	2,048.9	2,101.3	-52.4	2,531.6	2,096.5	435.1
	Photography services	402.0	89.5	312.5	380.8	74.4	306.4
	Subtotal	276.0	498.8	-222.8	282.1	435.6	-153.5
D. Books/Press	Publication	256.6	472.8	-216.2	260.3	410.2	-149.9
	Newspaper	19.4	26.0	-6.6	21.8	25.4	-3.6
	Subtotal	10.5	408.0	-397.5	11.3	424.7	-413.4
E. Audio-Visual/	Movie theater	10.1	408.0	-397.9	10.9	424.7	-413.8
Interactive Media	Public broadcasting	0.1	0.0	0.1	0.1	0.0	0.1
	Private broadcasting	0.3	0.0	0.3	0.3	0.0	0.3
	Subtotal	7,728.3	12,525.8	-4,797.5	8,261.5	12,328.8	-4,067.3
F. Design/Creative	Civil engineering and construction services	3,704.3	3,706.8	-2.5	3,658.6	3,160.8	497.8
Services	Advertising services	4,024.0	8,819.0	-4,795.0	4,602.9	9,168.0	-4,565.1
	Subtotal	1,509.2	4,554.5	-3,045.3	1,781.6	5,173.1	-3,391.5
Transverse domains	Other personal, cultural and recreational services	133.4	329.8	-196.4	173.8	292.5	-118.7
	Usage fee for copyright, etc.	723.9	3,003.7	-2,279.8	900.5	3,669.8	-2,769.3
	Audiovisual and related services	651.9	1,221.0	-569.1	707.3	1,210.8	-503.5

Table 3-2 Exports and Imports of Japanese Culture (2015-2019) (continued)

		(100 million yen)					
Domain	Sub-domain	2017			2018		
		Export value	Import value	Balance of payments	Export value	Import value	Balance of payments
Total		18,493.1	25,392.9	-6,899.8	16,254.5	23,651.5	-7,397.0
Import and Export Total (Based on the I-O Table)		893,794.0	989,229.3		935,337.2	1,074,277.0	
Percentage of total imports and exports (Based on the I-O Table)		2.1%	2.6%		1.7%	2.2%	
A. Cultural/ Natural Heritage	Subtotal	64.2	58.9	5.3	76.1	122.1	-46.0
	Social education (Public)	32.1	0.0	32.1	39.4	0.0	39.4
	Social education (NPI)	13.0	0.0	13.0	15.9	0.0	15.9
	Antique	19.1	58.9	-39.8	20.8	122.1	-101.3
B. Performance/ Celebration	Subtotal	1,337.9	1,670.4	-332.5	1,657.3	1,337.7	319.6
	Entertainment facilities (except movie theaters)·Troupe	833.4	1,066.3	-232.9	1,115.6	738.5	377.1
	Manufacture of musical instruments	504.5	604.1	-99.6	541.7	599.2	-57.5
	Subtotal	2,804.6	3,246.1	-441.5	2,648.3	3,180.1	-531.8
	Paintings	274.7	547.0	-272.3	357.3	500.3	-143.0
	Other visual arts	97.5	392.0	-294.5	141.6	398.1	-256.5
	Jewelry	1,994.9	2,226.2	-231.3	1,566.9	2,178.8	-611.9
	Photography services	437.5	80.9	356.6	582.5	102.9	479.6
	Subtotal	307.9	471.6	-163.7	328.6	439.8	-111.2
D. Books/Press	Publication	282.9	416.8	-133.9	298.4	412.6	-114.2
	Newspaper	25.0	54.8	-29.8	30.2	27.2	3.0
	Subtotal	11.8	428.5	-416.7	11.2	476.3	-465.1
E. Audio-Visual/ Interactive Media	Movie theater	11.4	428.5	-417.1	10.8	476.3	-465.5
	Public broadcasting	0.1	0.0	0.1	0.1	0.0	0.1
	Private broadcasting	0.3	0.0	0.3	0.3	0.0	0.3
	Subtotal	11,637.4	14,367.1	-2,729.7	9,209.1	13,073.9	-3,864.8
F. Design/Creative Services	Civil engineering and construction services	3,320.1	3,398.4	-78.3	3,561.0	3,422.0	139.0
	Advertising services	8,317.3	10,968.7	-2,651.4	5,648.1	9,651.9	-4,003.8
	Subtotal	2,329.3	5,150.3	-2,821.0	2,323.9	5,021.6	-2,697.7
Transverse domains	Other personal, cultural and recreational services	167.9	324.5	-156.5	327.2	214.9	112.3
	Usage fee for copyright, etc.	1,159.8	3,790.2	-2,630.4	1,607.5	4,276.0	-2,668.5
	Audiovisual and related services	1,001.6	1,035.6	-34.0	389.2	530.7	-141.5

Table 3-2 Exports and Imports of Japanese Culture (2015-2019) (continued)

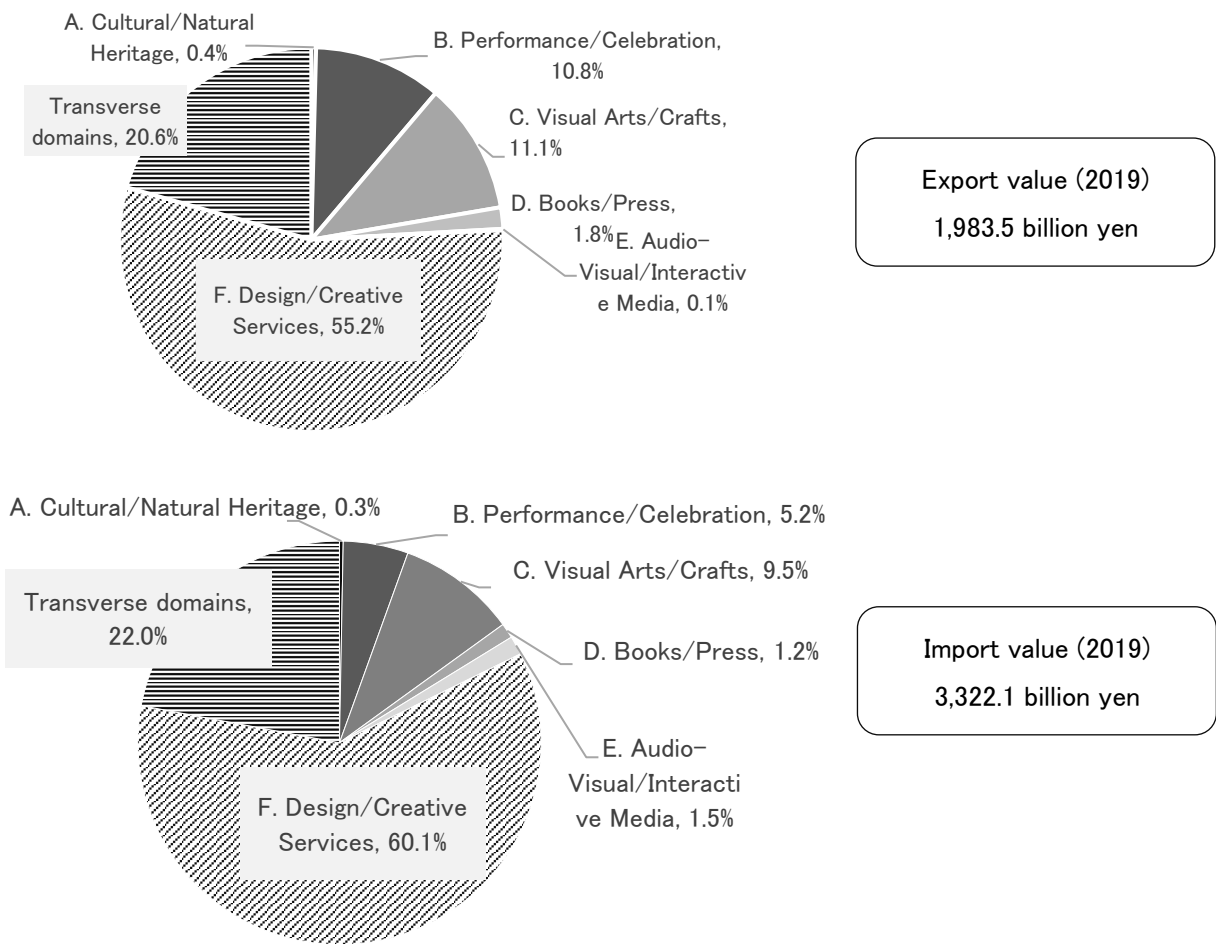
(100 million yen)

Domain	Sub-domain	2019		Balance of payments
		Export value	Import value	
Total		19,834.9	33,221.0	-13,386.1
Import and Export Total (Based on the I-O Table)		911,185.8	1,045,142.7	
Percentage of total imports and exports (Based on the I-O Table)		2.2%	3.2%	
A. Cultural/ Natural Heritage	Subtotal	75.9	113.7	-37.8
	Social education (Public)	43.0	0.0	43.0
	Social education (NPI)	17.3	0.0	17.3
	Antique	15.6	113.7	-98.1
B. Performance/ Celebration	Subtotal	2,137.6	1,740.3	397.3
	Entertainment facilities (except movie theaters) • Troupe	1,584.8	1,123.3	461.5
	Manufacture of musical instruments	552.8	617.0	-64.2
	Subtotal	2,206.1	3,171.5	-965.4
C. Visual Arts/Crafts	Paintings	313.3	433.4	-120.1
	Other visual arts	134.1	386.2	-252.1
	Jewelry	1,229.9	2,263.8	-1,033.9
	Photography services	528.8	88.1	440.7
	Subtotal	352.9	414.0	-61.1
D. Books/Press	Publication	320.6	383.6	-63.0
	Newspaper	32.3	30.4	1.9
	Subtotal	11.8	488.5	-476.7
E. Audio-Visual/ Interactive Media	Movie theater	11.4	488.5	-477.1
	Public broadcasting	0.1	0.0	0.1
	Private broadcasting	0.3	0.0	0.3
	Subtotal	10,958.4	19,981.5	-9,023.1
F. Design/Creative Services	Civil engineering and construction services	3,529.0	3,629.5	-100.5
	Advertising services	7,429.4	16,352.0	-8,922.6
	Subtotal	4,092.2	7,311.5	-3,219.3
Transverse domains	Other personal, cultural and recreational services	633.3	503.9	129.4
	Usage fee for copyright, etc.	1,817.1	5,415.2	-3,598.1
	Audiovisual and related services	1,641.8	1,392.4	249.4

(Note) Cultural imports and exports include those derived from statistics other than the input-output table, such as jewelry and transverse domains. The import and export values in the input-output table are considered to include these import and export values, and the ratio is calculated.

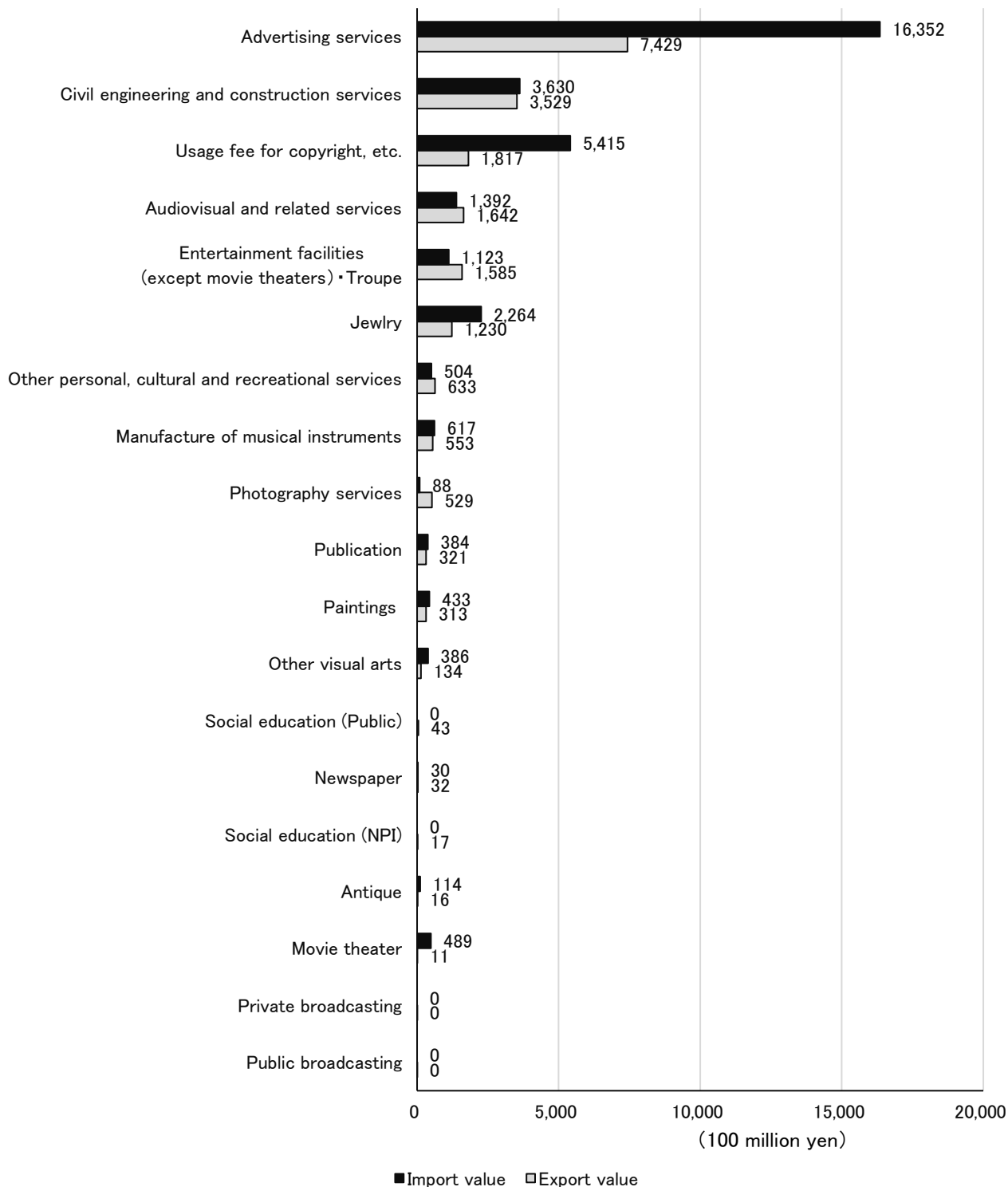
In terms of the composition of imports and exports in 2019, "F. Design/creative services (civil engineering and construction services/advertising services)" accounted for the largest share, with both imports and exports exceeding 50%. This is followed by "transverse domains" and "C. Visual Arts/Crafts." (Transverse domains are from areas A to F and cannot be divided further.)

Figure 3-1 Composition of Japan’s cultural imports and exports by domain (2019: nominal value)



In terms of imports and exports by item, the three services of advertising, civil engineering and construction services, and royalties, etc., account for the largest amounts. Jewelry is the most common type of commodity for import and export.

Figure 3-2 Exports and imports of Japanese culture by item (2019)



In 2019, both imports and exports grew, and the balance deficit widened. (Figure 3-3)

This is thought to be due to an increase in the advertising deficit. (Figure 3-4)

Figure 3-3 Changes in Japanese cultural imports and exports (2015-2019: nominal values)

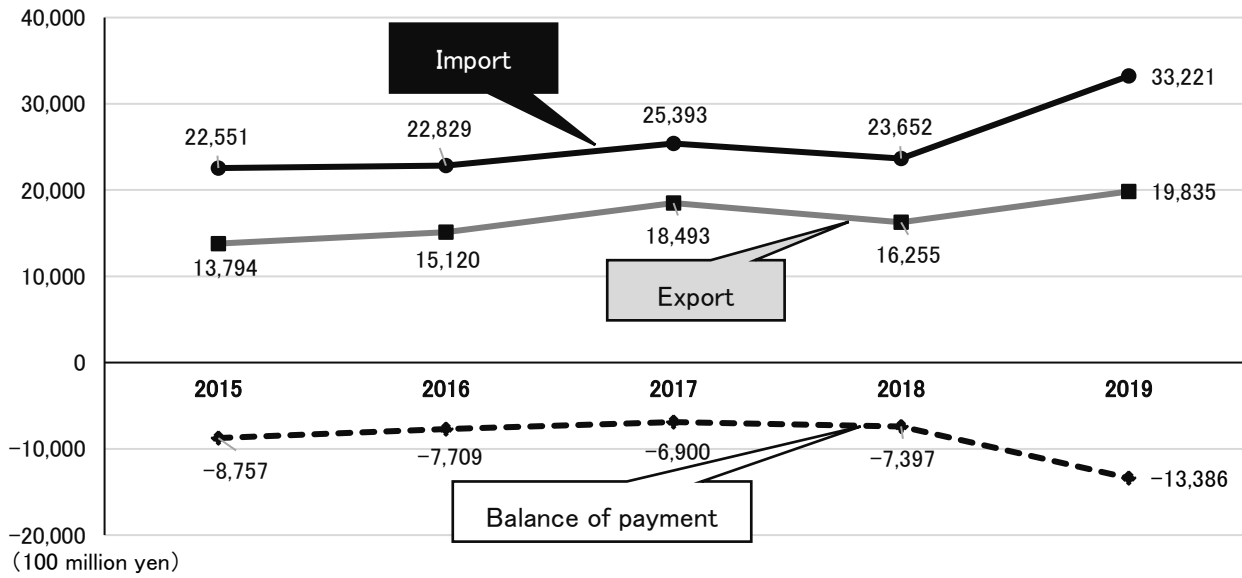
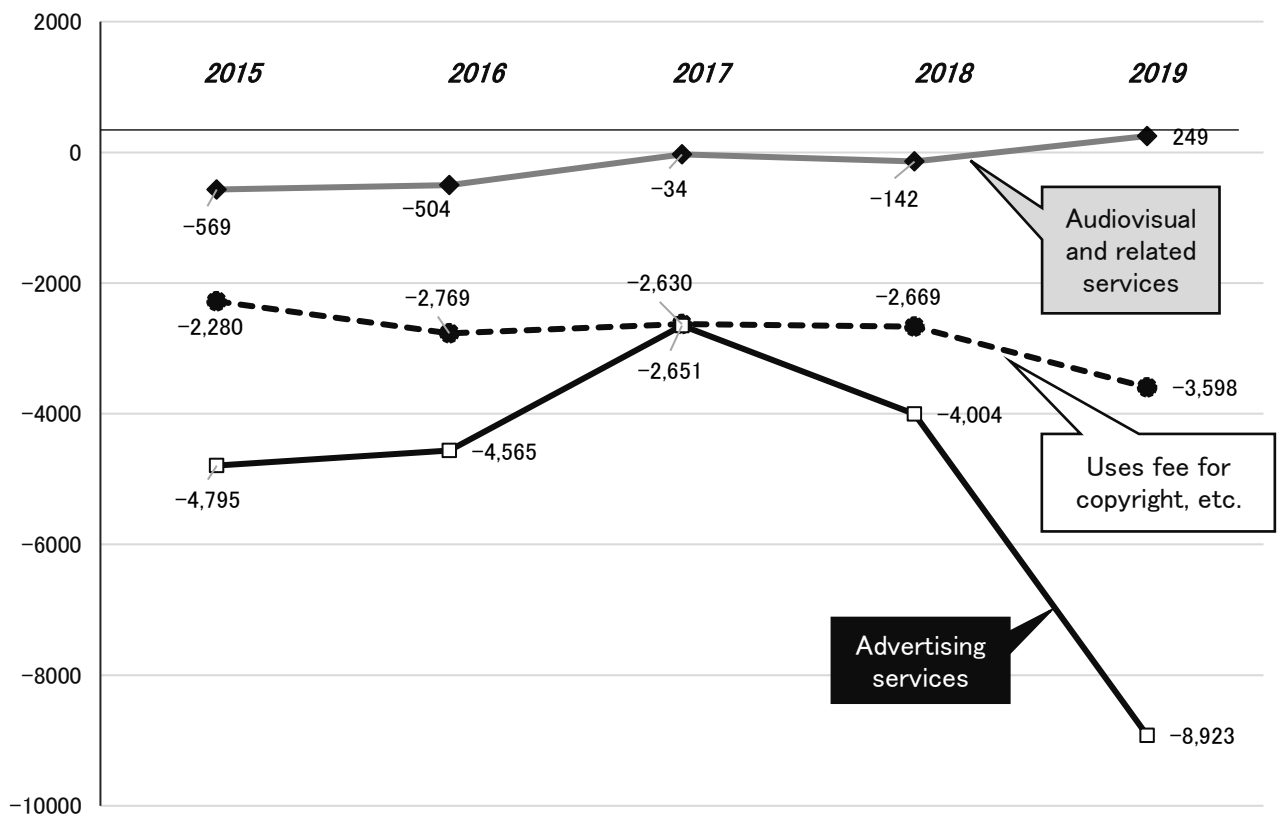


Figure 3-4 Changes in Japanese cultural export and import balance (top three items) (2015-2019: nominal values)



(100 million yen)

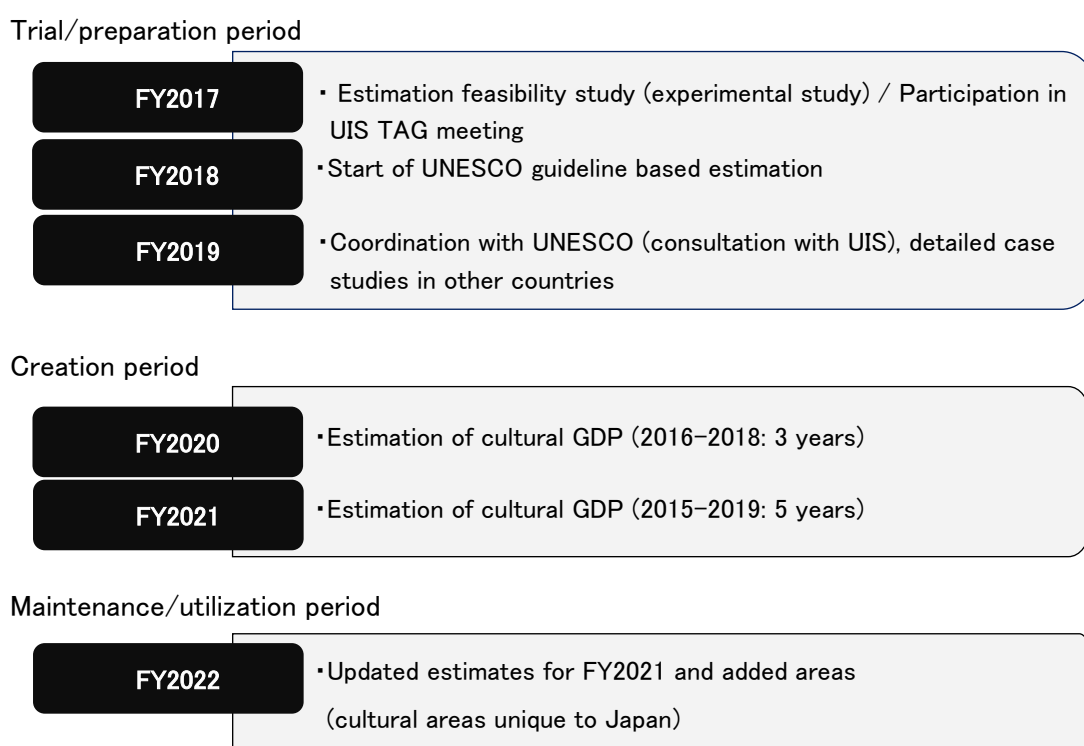
Chapter 4 Proposals for new cultural policies

The compilation of Japan's Cultural Satellite Account (CSA) (estimating cultural GDP, cultural employment, and cultural imports and exports) began with Japan's Future Investment Strategy 2017. This national strategy presented a policy for expanding the cultural GDP. In the same year, the "Basic Act on Culture and the Arts" was enacted and the "Cultural Economic Development Strategy" was formulated. This heightened interest in estimating the economic value of culture and the arts. In this way, the Agency for Cultural Affairs began working on a concrete estimate of cultural GDP.

The core of this effort was the UNESCO guidelines (2009 FCS). The preparation of Japan's CSA was also an effort to apply these guidelines to Japan's cultural situation, cultural statistics, and economic (industrial) statistics. In summarizing the overall flow, the current fiscal year can be considered the first year of the "maintenance/utilization period" which followed the "trial/preparation" and "creation" periods.

Based on this trend, this chapter reaffirms the aims of cultural GDP estimation and CSA compilation, and presents proposals for new cultural policies in the future.

Figure 4-1 Progress of cultural GDP estimation



1. Toward an Estimation of Cultural GDP in Accordance with Japan's Current Reality

The current cultural GDP estimates for each country are mainly based on the 2009 FCS published in 2009 by the UNESCO Institute for Statistics. Estimates based on the international 2009 FCS standard are of great significance for international comparison. On the other hand, cultural activities are more diverse than economic activities. The UNESCO guidelines indicate the greatest common denominator of culture, but there are many aspects of culture that cannot be expressed in terms of a common denominator depending on individual countries, regions, and ethnic groups.

When considering cultural policy, it is not always possible to aim for an accurate cultural policy without considering various cultural factors outside the denominator. For this reason, CSA as a tool for cultural policy planning and evaluation (EBPM or as a KPI for cultural policy, etc.) has two aspects. It can be used as a tool for international comparison and at the same time, as a tool for policy planning and evaluation that matches the cultural reality of each country.

The progress of Japan's cultural GDP estimation on the previous pages shows that Japan has worked on estimating cultural GDP as a tool for international comparison based on UNESCO guidelines. At the same time, however, efforts have also been made to make GDP estimates that match the realities of Japan's culture, and this year's survey estimate of the value added of cultural practices has such an intention.

In the future, it is hoped that a framework will be created that combines cultural GDP estimations based on UNESCO guidelines with international comparisons and Japan's unique aspects. If so, cultural policy, or policy planning and evaluation that considers both cultural and economic fields, will be effective and have a wide range of applications.

1.1 Creation of a Japanese culture inclusive framework

It is necessary to sort out the unique areas of Japan's culture that impact the economy, including those of life culture as discussed in Chapter 1 of the current research study, and to proceed with the creation of a cultural framework. Our cultural GDP within this framework will be combined with internationally comparable cultural GDP to create a statistical tool that is in line with the actual dynamic state of Japan's culture.

To this end, it is necessary to define the extent of the cultural domain. This study must be based on the fundamental ideas of the UNESCO guidelines, and must have an awareness of the history and current realities of Japanese culture, the philosophy of cultural policy, and so on. Mexico's "toys," South American countries' "traditional food," and Australia's "indigenous culture," for example, are cases in which each country has established a framework that includes its own reality and way of thinking. In Japan as well, "food" and "traditional Japanese culture" are considered to be important politically.

1.2 Enhancement of approaches from the demand side

In order to estimate a cultural GDP that matches the realities of Japan's culture, it is essential to estimate areas of life culture. However, estimation methods in this area must also measure cases in which a demand-side approach is more suitable than the method indicated in the UNESCO guidelines (a production-side approach).

A demand-side approach was originally designed for the current study. In order for this method to be certified as appropriate by experts, it is necessary to identify any problems, etc., and make progressive efforts such as monitoring by related experts.

1.3 Estimates for the field of culture and arts education

In the 2009 FCS, culture and arts education (public, private, within school education) is defined as a cross-cutting area and is not included in the core areas. However, many of the countries that undertake cultural GDP estimates add culture and arts education to their scope. This issue was also taken up in the currently suspended discussions on the formulation of the 2017 FCS (2009 FCS revised version) at UNESCO, so the inclusion of culture and arts education in the area of cultural GDP can be considered an international trend. It is necessary to estimate and include it in Japan, as well.

2. Further adaptation to UNESCO guidelines

The development of CSA in line with the actual situation in Japan is, so to speak, an expansion of the CSA. On the other hand, in addition to the currently estimated content, it is desirable to strengthen the CSA categories by developing accounts such as those of the cultural industries fixed capital formation and cultural industrial asset stock.

Our current CSA only captures flow. We can talk about "utilization" in the flow, but it is difficult to fully discuss values such as preservation, maintenance, and inheritance that are the premise of utilization. It is necessary to achieve a social consensus on the recognition that flows (cultural industries, cultural activities, economic profits, etc.) are generated from stock (cultural capital and cultural resources). It is also necessary to strengthen the CSA so that it can truly represent cultural policy.

2.1 Refinement of data on culture imports and exports for international comparison

Importing and exporting culture will be an important factor in linking culture and the economy in the future. One way to increase cultural GDP is to increase cultural exports. South Korea actively exports cultural content such as K-POP, which has become an important "export item" of their country. South Korea has statistics, including those on imports and exports, of its substantial cultural content industries. However, Japan's trade statistics and balance of payments statistics continue to be based on an industrial-type social system, just like the SNA. For this reason, it is difficult to capture cultural content figures, because they are not assessed like tangible commodities.

At the same time, for use as statistical data on cultural imports and exports in general, it is important to develop micro-level statistical data on cultural and other exports (e.g. limited to music genres and movie genres) for cultural export strategies and EBPM.

Moreover, the extent countries include trade statistic in the estimation of CSA is not necessary aligned even for the core areas of culture in the UNESCO framework, needless to say the limited areas mentioned above.. A more detailed analysis is necessary to observe the international trade of cultural goods and services and make meaningful international comparisons.

3. International and domestic dissemination of information

Japan was a relative latecomer to the compilation of the CSA, and its achievements are not well known in the world. This fiscal year, we created a simple tool to showcase “CSA in Japan” and distributed it to UNESCO and other stakeholders. In addition, the members of the "Committee for Research Projects for Numerical Evaluation of the Economic and Social Impact of Culture and the Arts," which advises and supervises this survey research, have presented their findings at relevant academic conferences both in Japan and overseas.

In the future, it is hoped that strategies for international and domestic dissemination of information will be clarified and effective efforts, made. In the meantime, holding study groups and forums on the theme of cultural GDP and CSA, in which a wide range of stakeholders can participate, is considered productive.

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