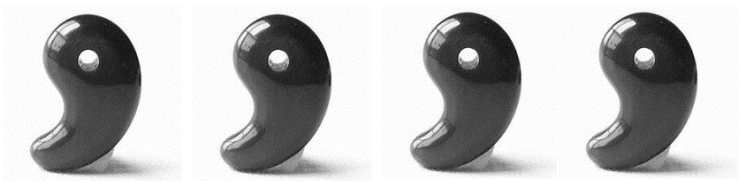
2020 Cultural Administration Research Survey

A Quantitative Evaluation:
The Economic and Social Effects of Culture (4)



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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.

Abbreviations

CAB	Convenio de Andrés Ballo
CPC	Central Product Classification
CSA	Culture Satellite Account
EBPM	Evidence-Based Policy Making
FCS	Framework for Cultural Statistics
GDP	Gross Domestic Product
GVA	Gross Value Added
ISIC	International Standard Industrial Classification
NAICS	North American Industry Classification System
SNA	System of National Accounts
TSA	Tourism Satellite Account
UIS	UNESCO Institute for Statistics
VA	Value Added

The Framework of this research

This report is the result of the "2020 Cultural Administration Research Survey---A Quantitative Evaluation: The Economic and Social Effects of Culture (4)". The research period extended from June 23, 2020 to March 31, 2021, and used the following framework.

1. Purpose of the survey

Japan's cultural GDP estimation and cultural satellite account (CSA) compilation began in 2015. To date, we have conducted case studies on cultural GDP, preliminary estimates, surveys of leading countries, and discussions with the UNESCO Institute for Statistics (UIS). This year, based on the progress so far, we re-estimated Japan's cultural GDP and estimated employment on a full scale using the UNESCO model. It can be said that this has made it possible to grasp the fundamental numerical values regarding the relationship between Japan's culture and economy.

In addition to cultural GDP and cultural employment estimations, the following work was also carried out this year.

(1) Estimations of the ripple effect of culture on the economy

(2) Updating of the international comparison

(3) Estimations of the cultural heritage GDP as seen from final demand

(1) substitutes a useful indicator of the impact of culture on the economy, which differs from the UNESCO model method of estimating cultural GDP. (2) secures an important viewpoint for utilizing the results of cultural GDP estimation in cultural policy. In this way, one aspect of Japan's cultural and economic position in the world can be grasped quantitatively. (3) is Japan's experimental approach to the challenges faced by the countries of the world working on CSA, including UIS, in estimating the cultural GDP using the UNESCO model.

The results obtained from the above work comprise the foundation for establishing a path leading to EBPM (evidence-based policy making) of cultural policy, using CSA as a "tool" in the future. In other words, the quantification of the economic and social impact of culture can be broadened, and the foundation for planning, drafting, and executing cultural policies can be enriched.

2. Survey content

This research study is roughly divided into two stages. In Stage 1, we enhanced the UNESCO model's cultural GDP estimation, and estimated the economic ripple effect of the associated culture. In Stage 2, we compare the results of Stage 1 with those of other countries, participate in international conferences, etc., widely publicize the results, and encourage proposals for new cultural policies.

(1) Estimate of value-added induction effect (estimation of cultural GDP)

Cultural GDP was estimated within the framework of the UNESCO model of culture. For the 2018 estimation, we used various statistical results (basic data) of confirmed values and the 2016 extended input-output table. Estimates for 2016 and 2017 are also based on the same criteria.

(2) Estimate of production-inducing effect (estimating the economic spillover effect)

The production-inducing effect is the "production spillover effect that occurs when demand newly increases," and is viewed from the demand side. This differs from the estimation of cultural GDP of the UNESCO model viewed from the production side. In this study, the entire final demand (total demand) of each cultural industry (each domain) is regarded as "additional final demand".

The final demand was extracted from the data of existing surveys such as the annual household survey / household consumption survey (Ministry of Internal Affairs and Communications) and the White Paper on Leisure (Japan Productivity Center). The added value was estimated using the input-output table. However, since there is a limit to obtainable data, the estimation was made using only valid data. The cultural activities targeted for the estimation are limited.

(3) Estimate of employment induction effect

There are two types of employment: employment created by production activities and employment created by production-inducing effects. The former is linked to the estimation of the value-added effect, and the latter is linked to the estimation of the production-inducing effect. For these two, the number of employees corresponding to the production value, etc. was estimated for the three years of 2016, 2017, and 2018 using the employment table (calculation of employment coefficient) of the 2015 input-output table.

(4) Comparing the survey with those of other countries

We have updated and enhanced the survey on international comparisons conducted last year. The countries surveyed are those making advanced efforts to compile CSA and estimate the economic scale of the cultural and creative industries: the United States, the United Kingdom, Australia, Canada, Germany, France, and Mexico.

(5) Publicizing our findings at international conferences

Participated in an international conference and gave a presentation.

ICES 2021(Pan Pacific Association of Input-Output Studies (PAPAIOS) 19-21 March, 2021 Kobe International House (Kobe City)

The following English materials were created and used in conjunction with our presentations.

- Outline of the presentation
- Presentation handouts/slides for the day
- Research papers on which the presentation was based

(6) Preparation of report / English translation / preparation of summary (simplified report)

(7) Proposals for new cultural policies

In carrying out the work, a study group was set up by the following members, and the work was promoted while receiving advice and supervision.

< Study Group Members*>

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*(Occupational titles are as of 2020)

Chapter1 Cultural GDP and its Estimation

1. The Concept of Cultural GDP

GDP (Gross Domestic Product) is "the total amount of added value produced in a country within a certain period of time". It is a central indicator of the SNA (System of National Accounts), which is a comprehensive statistical measure of the economy, and is used as an indicator of the economic scale of a country (or single region). GDP is calculated in compliance with the accounting standards of the national economy set by the United Nations, which makes it possible to apply a common measure to the evaluation of each country's economic scale.[1] Although this occurred around 50 years ago, in 1971, a major newspaper company in Japan published a book entitled, "Kick out GNP-The Inside Facts of High Economic Growth" (direct translation of Japanese title) which brought discussion of the issues around GNP to the forefront. (At the time, nationality was more important than national borders, and GNP (Gross National Product) was in common use). The content of this popular book opposed measuring a country's economic power with the economic indicator of value added. However, although the first practical version of SNA was published in 1968, the concept has been revised since that time. It took 50 years to "kick out" the basic concept of GDP because it enabled the convenience of evaluating the economic size of each country with a common measure.

In fact, there are two types of GDP: nominal GDP, in which value added is represented by the nominal value of each year, and real GDP, in which value added is estimated by fixing the price evaluation point to remove the effects of price fluctuations. Economic growth rate is the growth rate of real GDP. In addition, although GDP is the sum of added value, in principle only the added value related to the production of goods and services traded in the official market is recorded.[2]

"Added value" is the value created by subtracting the costs of raw materials and fuels required for production from the total production value, and newly created by production activities. Cultural GDP is the added value created by cultural activities. The value created as a result of cultural activities is diverse, and includes non-monetary and non-market types. However, the only economic added value that is captured in the framework of GDP is cultural GDP. More specifically, cultural GDP is an amount included within the existing GDP framework. This is equivalent to the "function-oriented satellite account" described later. Therefore, it

1 The SNA has several versions. The prototype was launched in 1953, the substantial first version in 1968, the revised version in 1993, and the revised version in 2008. Regarding the evaluation of value added, the evaluation method has been modified to match that of the real economy.

2 Activities that are not traded in the market, with some exceptions, are not included in GDP. For this reason, domestic work and volunteer activities that are not part of the work of registered non-profit organizations are not included in GDP. The exceptions are farmer's self-consumption (which assumes that they took produce to market and bought it back again) and the rent of an owner's house (the resident who pays rent to a landlord who is him/herself, the tenant). Markets are official markets, and value added in illegal markets such as those of drugs and gambling are not included in GDP. Only production activities create added value. For example, if there is a gain in land transactions, only the real estate brokerage fee is recorded in GDP. In connection with this, the increase in value due to the rise in land prices is not included in added value, and the asset value is recorded as an increase. The same is true for the trading of antiques, paintings, or stock or gold financial assets.

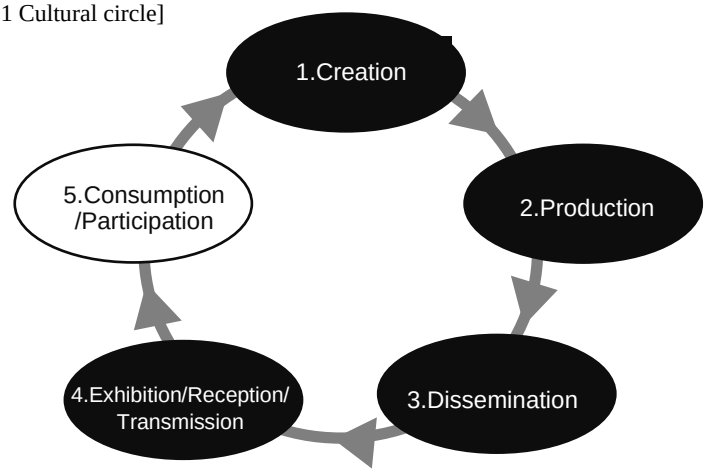
must be noted that cultural GDP does not seek to add new value to cultural activities or cultural creative activities.

2. Concept of estimating cultural GDP

The SNA framework presupposes existing industry classifications. The industrial classification is based on the criteria that similar products are produced by similar production methods. On the other hand, in cultural activities, the industries that produce them are not necessarily classified as one group, and in most cases, they are part of an industry or cross multiple industries. Therefore, in order to estimate cultural GDP, it is necessary to extract and recount the value added (cultural GDP) of cultural activities that are part of GDP in various industrial sectors. For example, if we look at music activities as an industry, we will extract the musical instrument manufacturing part from the manufacturing industry, and then perform the artist's performance (entertainment), and also record it, manufacture the CD, sell it, rent it. This is referred to as the "cultural circle" of cultural activities, and industrial activities are involved in each stage of these cultural activities. The "cultural production" of music activities is the integration of the music activities of each stage in relation to industrial activities. What is more, the value added created there is the "GDP of music culture".

In addition to music, the total of industrial activities in fields related to activities considered to be human cultural activities, such as performing arts, visual arts, literature, and protection and utilization of cultural properties, is cultural production, and its value added is cultural GDP. This cultural GDP is estimated based on SNA. The estimation system is Cultural Satellite Accounts (CSA). CSA is a system reconfigured by recombining an existing SNA.[3]。

[Figure 1-1 Cultural circle]



Source: UNESCO FC2009

3 CSA is a cultural version of SNA. As SNA is also a type of GDP indicator, CSA is a "cultural GDP indicator", but SNA includes factors such as gross national income and its distribution by industry in addition to GDP. Therefore, it is possible to estimate employment by culture in addition to cultural GDP. This survey also estimates cultural employment. Internationally, CSA is an account that includes not only cultural GDP but also cultural imports and exports in addition to the estimation of employment by culture.

In order to estimate cultural GDP, the following two tasks are required.

①Determining the range of culture

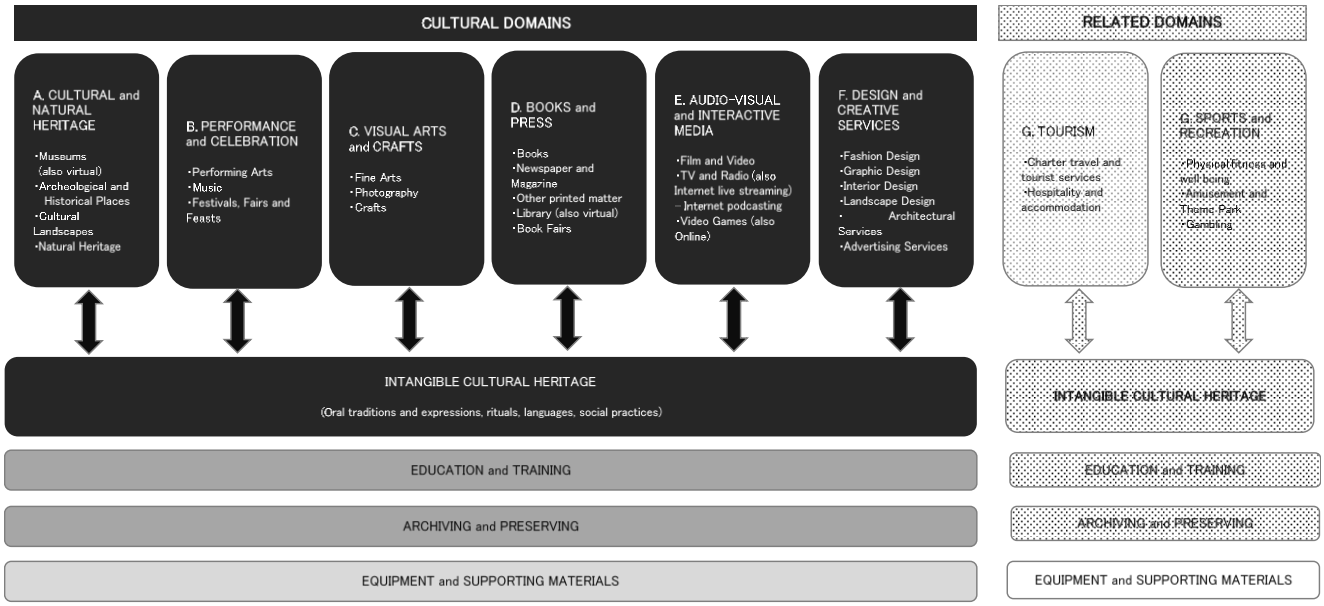
②Determining the estimation method

Regarding these two tasks, the UNESCO Institute for Statistics has published the "2009 UNESCO Framework for Cultural Statistics" (2009 FCS) as a guideline. This guideline is the current international standard for CSA preparation and is the basis for CSA preparation and cultural GDP estimation in countries such as Canada, Australia and South American countries. The "determining of the range of culture" and "method of estimation" in this research have also been determined based on this.

3. Determining the Range of Culture

The cultural scope of the cultural GDP estimation in this research study is set as shown in the figure below, based on the 2009 FCS. The gray area is the scope of cultural GDP estimation. This corresponds to the core cultural area of 2009 FCS. In addition to the core cultural areas, the UNESCO framework includes related areas and cross-disciplinary areas, but these are not included in the estimation in this study.[4]

[Figure 1-2 Framework for cultural statistics domains (UNESCO FCS2009)



Source: UIS (2015) "Culture Satellite Account: An Examination of Current Methodologies and Country Experiences"

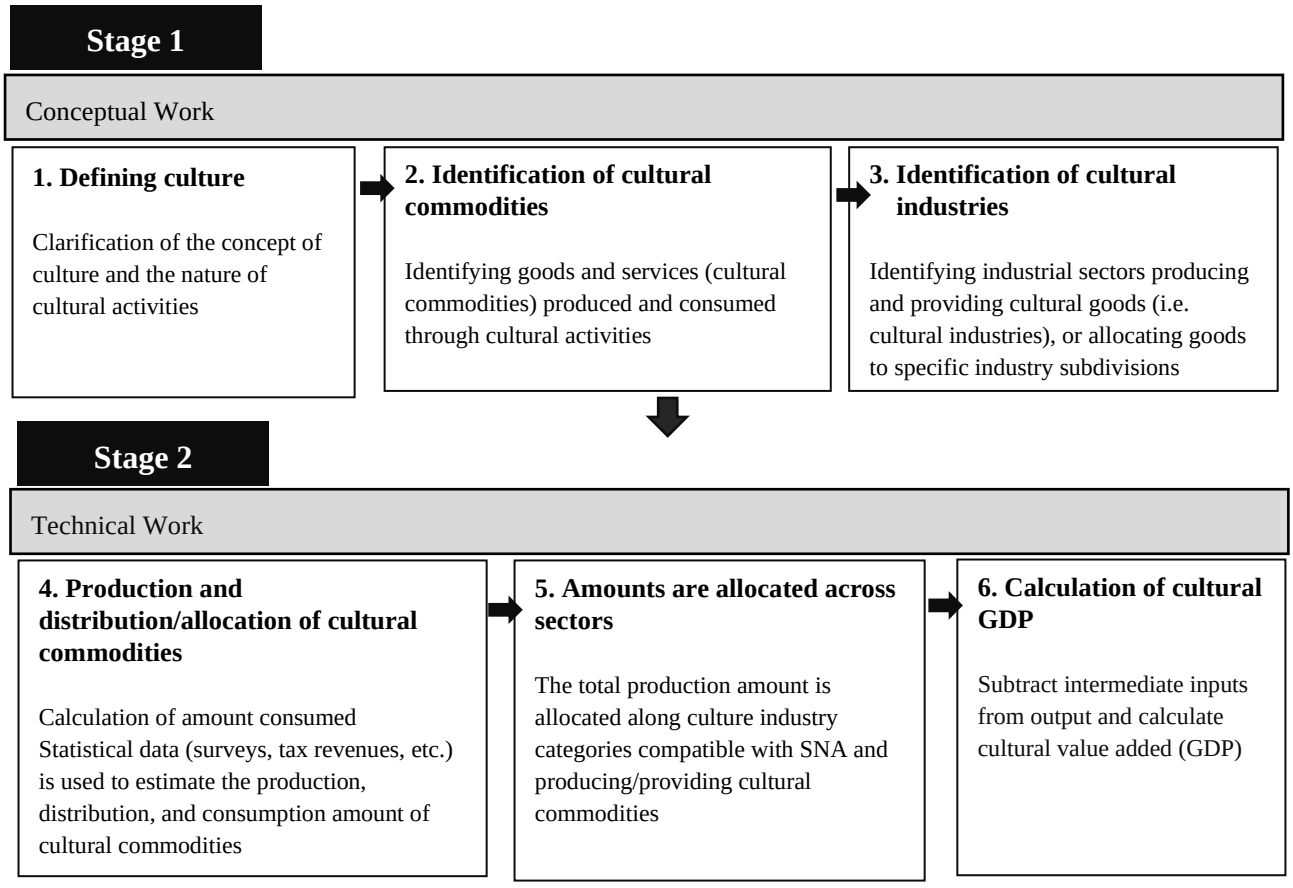
4 Discussions on determining the scope of culture are still ongoing at UNESCO. For example, in the 2017 model under consideration, the cross-disciplinary area of "education / training" of the 2009 model and the completely new area of "cultural management (public and private)" are candidates for core cultural areas. Cultural scope determination is not a conceptual definition, but a pragmatic one that can be replaced with economic activity.

4. Methodology

The procedure for estimating cultural GDP consists of two major steps: conceptual work and technical work. The content (cultural area) of the culture to be estimated by GDP is classified at the conceptual work stage. This is as shown in the previous section.

Next, the cultural products related to the cultural domain are extracted. At the technical work stage, the production value of cultural products included in each industrial sector is first estimated. However, for products for which only the consumption value can be obtained, processing such as estimating the production value by subtracting the import amount from the consumption value is performed. Then, by multiplying the production value by the value-added ratio of the industry, the value-added value (cultural GDP) is estimated.[5]

[Figure 1-3 The Basic Procedure for Estimating Cultural GDP]



Source: Prepared by CDI

5 The cultural GDP estimation of this survey considers that the gross value added produced in that area corresponds to the cultural GDP, and "multiplying the production value by the added value rate" is the basic calculation method of the cultural GDP. The input-output table is used to grasp the added value, and the gross value-added ratio is based on the input-output table. In the input-output table, the gross value added includes "non-household consumption expenditure". Non-household consumption expenditure is consumption expenditure paid by companies such as entertainment expenses and entertainment expenses, but in SNA this is part of the interim input and is not included in gross value added. Since CSA conforms to SNA, the value-added rate was calculated using the value-added rate that does not include non-household consumption. In other words, the cultural GDP (gross value added) shown in this report does not include non-household consumption expenditure.

Chapter 2 Estimation of Japanese Cultural GDP and Employment

1.Overall picture

1-1 Cultural GDP

In 2018, the domestic production of Japanese culture was 25,954.6 billion yen, and the gross domestic product (cultural GDP) was 10,538.5 billion yen. Cultural GDP accounted for 1.9% of Japan's total GDP.

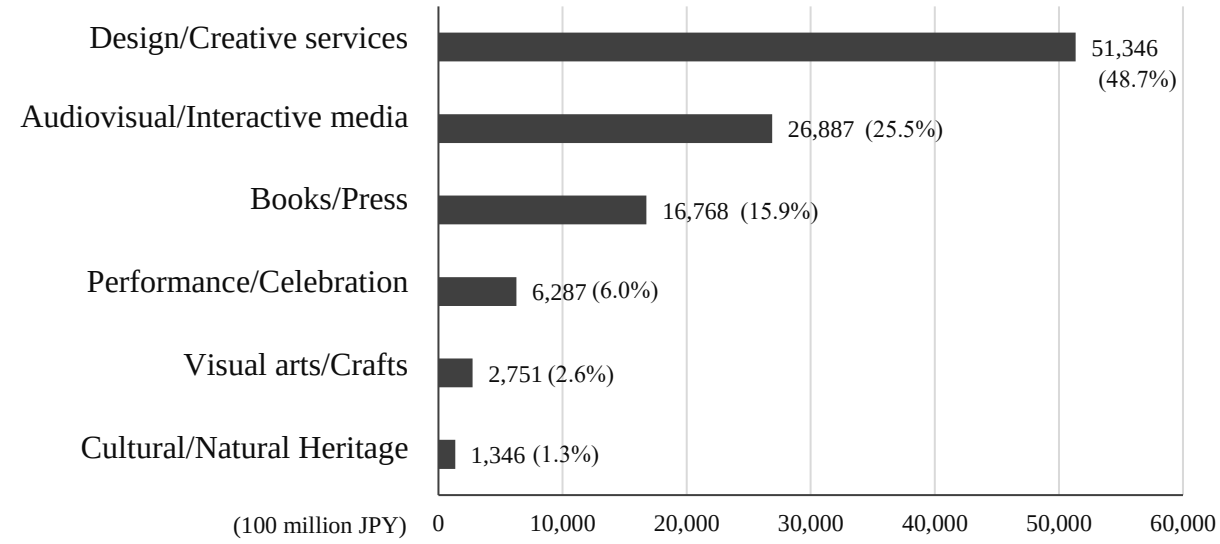
[Table 2-1 Domestic production of Japanese culture (2018)]

(Billion JPY)

	Domestic production	Gross domestic product (cultural GDP)
Cultural production	**25 954.6**	**10 538.5**
Ratio to total production	2.5%	1.9%

The breakdown of cultural GDP shows that the design / creative service sector accounts for about 48.7% of the total. The audiovisual/interactive media sector accounts for 25.5%, and the books/press sector accounts for 15.9%. These three divisions account for 90.1% of the total.

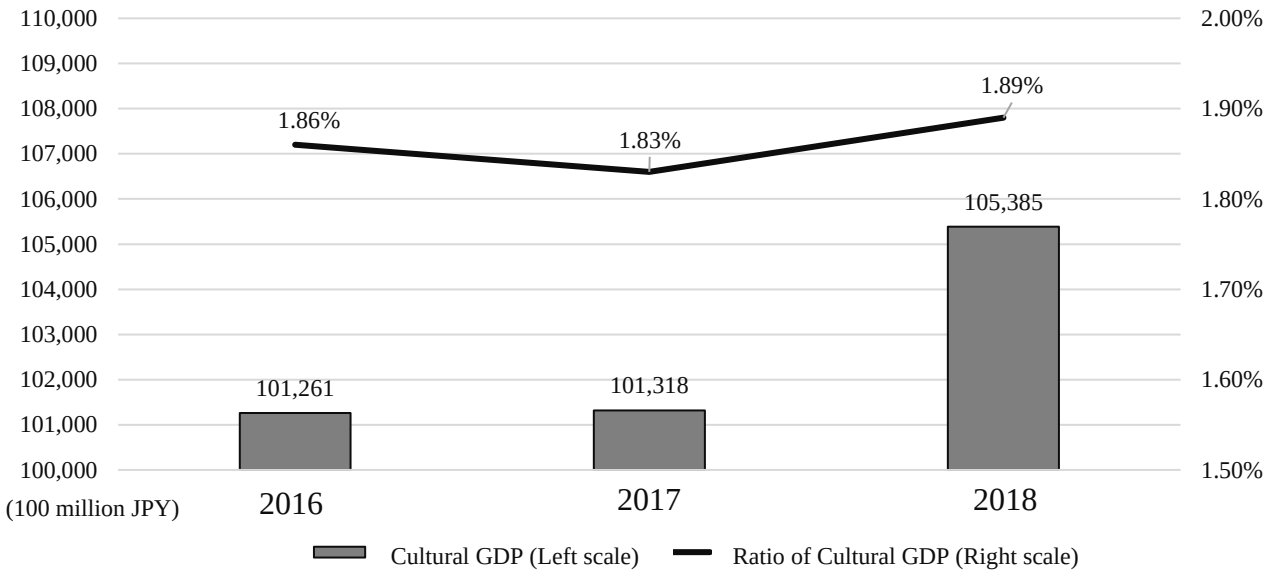
[Figure 2-1 Breakdown of cultural GDP (2018)]



1-2 Transition

The transition of cultural GDP from 2016 to 2018 has changed slightly in both the 10 trillion yen range and 1.8% range. The two-year growth rate of cultural GDP was 4.1%. At the same time, Japan's GDP growth rate was 2.2%.

[Figure 2-2 Transitions in Cultural GDP (2016-2018)]



2. Estimation of Cultural Employment

2-1. Methodology

SNA estimates employee income by industry from the value of domestic production by industry. Using this estimate, the number of employments for each cultural industry (cultural domain) can be estimated. In this survey, we estimated the number of employees by domain, using this as cultural employment.

$$\frac{\text{Number of employees in industry A}}{\text{Production value of industry A}} = \text{Employment Coefficient}$$

Statistically, workers and employers are not synonymous (employee = self-employed + family employee + employer), but here the culture "employment" is used for convenience. Also, the "employment coefficient" is the reciprocal of labor productivity, and the smaller the employment coefficient, the higher the production volume per worker.

2-2. Estimated result（2018）

Cultural employment in 2018 is estimated to be 1,226 thousand. This is equivalent to 1.8% of the total number of jobs in Japan. (Cultural GDP is 1.9%) The design/creative services sector accounts for about 48% of the total employment. This is followed by 20% in the books/press department and 18% in the audio-visual/interactive media department. These three divisions account for 86% of the total. As for GDP per capita, the average for the whole culture is higher than the average for the whole country. However, only two domains, audio-visual/interactive media and design/creative services, are above the national average.

The transition of cultural employment from 2016 to 2018 is 1.2 million, 1.7-1.8%, which is a minimal change. Cultural employment grew at 4.2% for two years. The total employee growth rate in Japan during the same period was 2.8%.

[Table 2-2 Cultural Employment (2018)]

Domain	Production Value 100 million JPY	VA (GDP) 100 million JPY	Employment Thousands of people
Cultural/Natural Heritage	3,548	1,346	**34**
Performance/Celebration	12,430	6,287	**80**
Visual Arts/Crafts	4,546	2,751	**73**
Books/Press	35,978	16,768	**239**
Audio-visual/Interactive media	73,669	26,887	**217**
Design/Creative service	129,376	51,346	**583**
Total	259,546	105,385	**1,226**

National Total	10,494,453	5,561,896	**68,006**
Ratio of National Total	2.47	1.89	**1.80**

[Table 2-3 Transitions in Cultural Employment (2016-2018)]

(Unit: thousands of people)

	2016	2017	2018
Number of Persons Employed	1,177	1,176	1,226
Ratio of National Total	1.78%	1.76%	1.80%

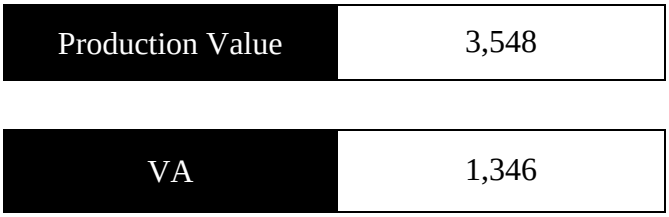
3. Cultural GDP by domain

[Notes on the following description]
*1 Since the figures in each table are rounded off, the total and the breakdown may not match.
*2 For the estimation of cultural GDP, we used a table (extended input-output table integrated table) that integrated the transaction amount table (506 x 386 sector table) of the 2016 extended input-output table into 187 sectors related to cultural industry.

3-1 Cultural/Natural Heritage

Estimations（2018）

(100 million JPY)



[Table 2-4 Domestic product and VA of cultural/natural heritage (2018)]

(100 million JPY)

	Production Value	VA
(1) National museums	302	126
(2) Public museums	1,703	657
(3) Private museums	788	340
Subtotal	2,793	1,122
(4) Cultural property protection	722	206
(5) Natural heritage protection	33	18
Total	3,548	1,346

Annual Transitions

[Table 2-5 Annual transitions in cultural/natural heritage (2016-2018)]

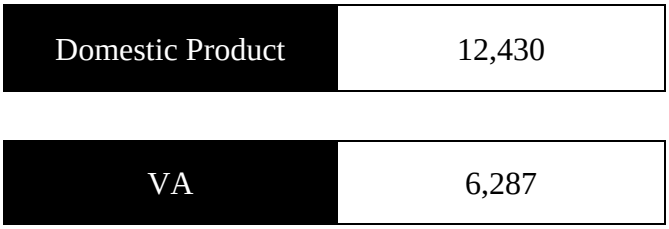
(100 million JPY)

Domain/Classification		2016	2017	2018
Museums	Production Value	2,788	2,871	2,793
	VA	1,207	1,207	1,122
Cultural property protection	Production Value	725	737	722
	VA	197	203	206
Natural heritage protection	Production Value	35	36	33
	VA	21	20	18
Total	Production Value	3,548	3,644	3,548
	VA	1,425	1,430	1,346

3-2 Performance/Celebration

Estimations（2018）

(100 million JPY)



[Table 2-6 Domestic product and VA of performance/celebration (2018)]

(100 million JPY)

	Production Value	VA
(1) Entertainment facilities (except movie theaters)・Troupe	7,533	4,479
(2) Manufacture of musical instruments	856	433
(3) Music software (CD's etc.) (Production value)	1,576	624
(4) Paid music distribution	612	150
(5) Music software production (excluding CD's and other sales revenue)	639	253
(6) Music CD rental	268	171
Subtotal	11,483	6,109
(7) National theater (6 theaters)	129	40
(8) Public theater, music hall etc.	818	138
Subtotal	947	178
Total	12,430	6,287

Annual Transitions

[Table 2-7 Transitions in Performance/Celebration (2016-2018)]

(100 million JPY)

Domain/Classification		2016	2017	2018
Performance	Production Value	10,350	10,673	11,483
	VA	5,407	5,617	6,109
Theater and Music Hall	Production Value	964	966	947
	VA	178	175	178
Total	Production Value	11,314	11,639	12,430
	VA	5,585	5,793	6,287

3-3 Visual arts/ Crafts

Estimations（2018）

(100 million JPY)

[Table 2-8 Domestic product and VA of visual arts/crafts (2018)]

(100 million JPY)

	Production Value	VA
(1) Purchased from artists (art・craft・calligraphy)	205	142
(2) Art goods (posters, etc.)	115	54
Subtotal	320	196
(3) Purchased from artists (photo)	6	4
(4) Photography	2,673	1,916
Subtotal	2,679	1,920
(5) Crafts	1,546	635
Subtotal	1,546	635
Total	4,546	2,751

Annual Transitions

[Table 2-9 Transitions in visual arts/crafts (2016-2018)]

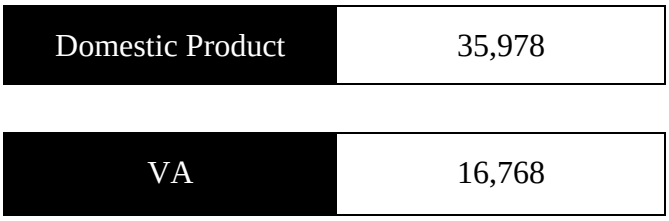
(100 million JPY)

Domain/Classification		2016	2017	2018
Art	Production Value	311	331	320
	VA	194	216	196
Photography	Production Value	3,514	3,300	2,679
	VA	2,519	2,365	1,920
Crafts	Production Value	1,550	1,529	1,546
	VA	631	627	635
Total	Production Value	5,375	5,160	4,546
	VA	3,344	3,208	2,751

3-4 Books/Press

Estimations（2018）

(100 million JPY)



[Table 2-10 Domestic product and VA of books/press (2018)]

(100 million JPY)

	Production Value	VA
(1) Books	7,312	2,993
(2) Magazines	8,088	3,310
(3) Book and magazine retailing	2,320	1,522
Subtotal	17,720	7,825
(4) Newspaper	10,968	4,780
(5) Newspaper retail	4,323	2,836
(6) News agency service	712	282
Subtotal	16,003	7,898
(7) National Diet Library	153	94
(8) Public Library	2,102	951
Subtotal	2,255	1,045
Total	35,978	16,768

Annual Transitions

[Table 2-11 Transitions in books/press (2016-2018)] (100 million JPY)

Domain/Classification		2016	2017	2018
(1) Books	Production Value	7,628	7,442	7,312
	VA	3,122	3,046	2,993
(2) Magazines	Production Value	8,990	8,473	8,088
	VA	3,680	3,468	3,310
(3) Book and magazine retailing	Production Value	2,361	2,199	2,320
	VA	1,549	1,443	1,522
(4) Newspaper	Production Value	11,958	11,677	10,968
	VA	5,211	5,088	4,780
(5) Newspaper retail	Production Value	4,438	4,309	4,323
	VA	2,911	2,827	2,836
(6) News agency service	Production Value	244	228	712
	VA	97	90	282
(7) National Diet Library	Production Value	155	152	153
	VA	94	93	94
(8) Public Library	Production Value	2,053	2,068	2,102
	VA	957	947	951
Total	Production Value	37,827	36,548	35,978
	VA	17,620	17,002	16,768

3-5 Audio-visual/Interactive media

Estimations（2018）

(100 million JPY)

[Table 2-12 Domestic product and VA of audio-visual/interactive media (2018)]

(100 million JPY)

	Production Value	VA
(1) Movie production and distribution	2,561	1,014
(2) Movie box office revenue	2,225	638
Subtotal	4,786	1,652
(3) NHK Viewing fee income	7,106	3,354
(4) Commercial terrestrial TV broadcasting	19,298	6,462
(5) Satellite broadcaster revenue	3,448	1,155
(6) Cable TV broadcaster revenue	5,020	2,555
(7) Radio broadcasting revenue	1,234	413
(8) Community broadcasting revenue	140	47
(9) Satellite general broadcasting audio broadcasting	190	64
(10) TV program production and distribution	8,373	3,314
(11) Radio program production revenue	98	39
Subtotal	44,909	17,402
(12) Video (DVD) production・sales	2,067	818
(13) Motion picture distribution revenue	2,200	540
(14) Post-production	484	192
Subtotal	4,751	1,549
(15) Game software sales	1,970	1,127
(16) Online game operation sales	14,701	3,606
(17) Distribution sales for feature phone	61	15
(18) Arcade, TV and music game	866	496
Subtotal	17,598	5,244
(19) Video (DVD・BR) rental	1,624	1,039
Total	73,669	26,887

Annual Transitions

[Table 2-13 Transitions in audio-visual/interactive media (2016-2018)]

(100 million JPY)

Domain/Classification		2016	2017	2018
Movie	Production Value	5,003	4,908	4,786
	VA	1,723	1,693	1,652
Broadcasting	Production Value	43,699	43,172	44,909
	VA	16,879	16,683	17,402
Audio-visual	Production Value	4,125	4,774	4,751
	VA	1,387	1,611	1,549
Games	Production Value	15,596	17,326	17,598
	VA	4,767	5,223	5,244
Video rental	Production Value	1,461	1,507	1,624
	VA	935	964	1,039
Total	Production Value	69,884	71,686	73,669
	VA	25,691	26,175	26,887

3-6 Design/Creative services

Estimations（2018）

(100 million JPY)

[Table 2-14 Domestic product and VA of design/creative services (2018)]

(100 million JPY)

	Production Value	VA
(1) Design	4,403	3,028
(2) Architectural services (include landscape design)	32,713	22,816
(3) Advertising services	92,260	25,502
Total	129,376	51,346

Annual Transitions

[Table 2-15 Transitions in design/creative services (2016-2018)]

(100 million JPY)

Domain/Classification		2016	2017	2018
Design	Production Value	5,209	5,375	4,403
	VA	3,582	3,697	3,028
Architectural services (includes landscape design)	Production Value	25,203	26,143	32,713
	VA	17,578	18，234	22,816
Advertising services	Production Value	95,637	93,267	92,260
	VA	26,436	25,780	25,502
Total	Production Value	126,049	124,785	129,376
	VA	47,596	47,711	51,346

Chapter 3 Economic Ripple Effect of Culture

1.Concept and Methodology

The idea of the CSA is the structure of "what is a cultural product, where it is produced, and how much value (added value) is produced there". On the other hand, the economic spillover effect is based on the idea of "what kind of production is triggered by the demand for new cultural products". In addition, CSA is an approach from the production side, while the economic spillover is approached from expenditure (final demand). To simplify, CSA seeks to view the composition of cultural activities and phenomena through cultural products. The economic spillover broadens the ecosystem to include the spillover. If the content (composition) of culture is accurately grasped by CSA and the ecosystem (relationship) of a wider culture is grasped based on it, the horizons will be broadened and an expanded way of thinking about cultural policy will be achieved. Even in TSA, there are two parts, a satellite account part and a spillover part. In terms of culture, if the spillover effect part is constructed as CSA is constructed, it is thought that the basis for quantitative evaluation of the economic and social impact of the cultural arts will be further enriched.

2. Estimations（2018）

2-1 Cultural facility admission fee (related to cultural/natural heritage)

Estimation of domestic demand

[Table 3-1 Estimation of domestic demand for cultural facility admission fee]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Social Education (Non-profit)	1,154	1.00000	1,154

Estimations of the Ripple Effect

[Table 3-2 Estimation of ripple effect from cultural facility admission fees]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect (a)	1,154	625	484	11
The first indirect effect	801	395	186	5
The second indirect effect	670	390	160	5
Total effect (b)	2,625	1,410	829	21
Effect magnification	2.3	2.3	1.7	1.9

2-2 Theater (related to performance/celebration)

Estimations of Domestic Demand

[Table 3-3 Estimations of the domestic demand for theater]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Entertainment	1,882	0.91628	1,724

Estimations of the ripple effect

[Table 3-4 Estimations of the ripple effect of theater]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	1,724	1,025	553	11
The first indirect effect	908	499	253	6
The second indirect effect	807	470	192	6
Total effect(b)	3,439	1,994	998	24
Effect magnification	2.0	1.9	1.8	2.2

2-3 Concerts (related to performance/celebration)

Estimations of Domestic Demand

[Table 3-5 Estimation of domestic demand for concerts]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Entertainment	5,498	0.91628	5,038

Estimations of the Ripple Effect

[Table 3-6 Estimations of the Ripple Effect of Concerts]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	5,038	2,995	1,616	33
The first indirect effect	2,653	1,459	740	19
The second indirect effect	2,357	1,372	562	18
Total effect(b)	10,048	5,826	2,917	69
Effect magnification	2.0	1.9	1.8	2.1

2-4 Art exhibition (related to visual arts/crafts)

Estimation of domestic demand

[Table 3-7 Estimation of domestic demand for concert]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Social Education (Non-profit)	1,098	1.00000	1,098

Estimation of ripple effect

[Table 3-8 Estimation of ripple effect of art exhibition]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	1,098	595	460	11
The first indirect effect	763	376	177	5
The second indirect effect	638	371	152	5
Total effect(b)	2,499	1,342	789	20
Effect magnification	2.3	2.3	1.7	1.8

2-5 Book and Magazine (related to books/press)

Estimation of domestic demand

[Table 3-9 Estimation of domestic demand for book and magazine]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Publish	4,553	0.97720	4,449
Whole sails	207	0.99695	207
Retail sails	1,121	1.00000	1,121
Rail freight transport	3	1.00000	3
Road freight transport	193	0.99981	193
Air freight transport	1	0.72507	1
Freight transportation	16	1.00000	16
Warehouse	48	1.00000	48
Total	6,141		6,037

Estimation of ripple effect

[Table 3-10 Estimation of ripple effect of book and magazine]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	6,037	2,886	1,773	43
The first indirect effect	5,060	2,492	1,240	29
The second indirect effect	3,014	1,755	718	23
Total effect(b)	14,111	7,133	3,731	95
Effect magnification	2.3	2.5	2.1	2.2

2-6 Newspaper (related to books/press)

Estimation of domestic demand

[Table 3-11 Estimation of domestic demand for newspaper]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Newspaper	9,215	0.99862	9,202
Retail sails	4,945	1.00000	4,945
Rail freight transport	1	1.00000	1
Road freight transport	515	0.99981	515
Air freight transport	0.5	0.72507	0.4
Freight transportation	33	1.00000	33
Total	14,709		14,696

Estimation of ripple effect

[Table 3-12 Estimation of ripple effect of newspaper]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	14,696	7,662	5,005	119
The first indirect effect	10,732	5,240	2,551	61
The second indirect effect	7,559	4,401	1,801	57
Total effect(b)	32,987	17,304	9,357	237
Effect magnification	2.2	2.3	1.9	2.0

2-7 Movie (related to audio-visual/interactive media)

Estimation of domestic demand

[Table 3-13 Estimation of domestic demand for movie]

Industrial classification	c. Final consumption (100 billion JPY)	d. Self-sufficiency rate	Domestic demand (100 billion JPY) (c×d)
Movie theater	2,924	0.84660	2,476

Estimations of the ripple effect

[Table 3-14 Estimations of the ripple effect of movies]

(Unit: 100 million JPY, thousands of people)

	Production induced value	VA (excludes non-household consumption)	Compensation of employees	Employment inducement effect (in thousands)
Direct effect(a)	2,476	710	424	23
The first indirect effect	2,823	1,329	642	15
The second indirect effect	1,067	621	254	8
Total effect(b)	6,366	2,661	1,321	46
Effect magnification	2.6	3.7	3.1	2.0

Chapter 4 CSA of Other Countries

1. USA

In 2012, the Bureau of Economic Analysis (BEA) of the Department of Commerce and the National Arts Fund (NEA) partnered to create a CSA framework. Based on that framework, they report their annual estimations. The name of the US CSA is Arts and Cultural Production Satellite Account (ACPSA).

The US CSA is estimated based on the National Accounts and Product Accounts (NIPAs) and extensive economic census. The domain framework is based on the North American Industry Classification System (NAICS). For employment, Occupation Employment Statistics (OES) is used. It is also made with reference to UNESCO's FCS2009 and other countries.

Cultural GDP is $ 877.8 billion (2017), which is 4.5% of total GDP. The GDP and the number of employees by domain are as follows.

[Table 4-1 Cultural GDP and employment of USA (2017)]

Domain	Sub domain	GDP (M USD)	Growth Rate form 2015(%)	Employment (thousands of people)
Information services	Publishing	95,681	5.3	312
	Movie	74,060	0.2	410
	Sound recording	14,129	5.8	17
	Broadcast	143,441	-0.4	431
	Other information services (Web publishing, streaming)	125,579	29.2	175
	Subtotal	452,890	—	1,345
Art support services	Rental, lease services	5,280	1.1	19
	Grant-making and giving services	1,082	1.3	9
	Unions	1,364	2.7	24
	Government	105,552	0.5	1,195
	Other support services (theater tickets agents)	343	10.2	3
	Subtotal	113,621	—	1,250
Design services	Advertising services	30,056	1.6	175
	Architectural services	21,626	3.3	140
	Landscape services	2,736	-0.5	32
	Interior design services	10,059	-4.4	42
	Industrial design services	1,670	-7.1	19
	Graphic design services	8,691	-1.3	61
	Computer system design	3,945	12.0	24

Domain	Sub domain	GDP（M USD）	Growth Rate form 2015(%)	Employment（thousands of people）
	Photography, Photo treatment services	8,444	-0.8	66
	Other design services	1,048	-5.6	9
	Subtotal	88,275	—	568
Performing Arts	Performing arts companies	13,957	1.0	122
	Performing arts presenters	15,288	5.5	112
	Agents and managers	5,139	4.1	15
	Independent artists, writers, and performers	38,255	-0.4	51
	Subtotal	72,639	—	300
Arts retail trade		40,800	4.3	600
Wholesale and transportation industries		36,560	0.8	207
All other industries		22,104	0.6	163
Manufacturing	Jewelry and silverware manufacturing	3,078	4.1	23
	Printed goods manufacturing	6,491	-2.7	73
	Musical instrument manufacturing	758	0.3	10
	custom architectural woodwork or an engineering firm offering industrial design services	3,091	1.4	39
	Other manufacturing	3,048	1.2	28
	Subtotal	16,466	—	173
Construction		16,357	7.5	128
Museums		7,876	2.5	149
Education services		7,538	0.3	99
Fine arts education		2,633	-0.3	126
Total		877,759	4.5	5,108

（Source：NEA (2020)）

2. UK

This report is estimated and published annually by the Department for Digital, Culture, Media and Sports (DCMS). Multiple departments of DCMS are in charge of this estimation. For example, Historic England is in charge of cultural heritage, the British Arts Council (ACE) is in charge of art and museums, and the British Film Institute (BFI) is in charge of movies, television, radio and other media.

The UK CSA is based on the UK National Accounts SU table and the Annual Business Survey (ABS). In addition to these two sources, each section in charge of the above conducts necessary investigations and determines various sub-sources, and estimates. For example, with regard to museums, surveys of museum targets have been conducted, and these various cultural statistics have been used. Regarding employment, the data of the Annual Population Survey of ONS (Office for National Statistics) and the framework of Standard Industrial Classification (SIC) are used. In addition, details such as age, gender, ethnicity, employment type, and region are estimated. In the UK, cultural GDP is not estimated, but cultural GVA is estimated accurately. The estimation framework covers the entire GVA of multiple sectors in charge of DCMS, including sports and media.

The numbers shown below are tentative estimates. In addition, the aggregated figures are the British cultural GVA re-aggregated with the area setting similar to the target area of Japan's cultural GDP estimation. Cultural GVA is about £ 76.4 billion, which is about 4.0% of UK GVA.

Looking at the changes in the culture-related fields since 2010, the growth rate of the creative industries is 43%, and that of the cultural industries is 22%. During this period, the growth rate of GVA in the UK was 17%. (chained volume measures)

The estimation of cultural employment is about 1.6 million persons.

[Table 4-2 Cultural GVA of UK (2018)]

Classification		Value (million £)
Cultural industry	Art	7,083
	Movie, TV, Music	21,271
	Radio	934
	Photography	563
	Craft	300
	Museum, Gallery	811
	Library, Archive	189
	Cultural Education	522
	Management of historical sites	632
	Subtotal	32,305
Creative industry (partial)	Architecture	3,641
	Design, Designer's fashion	2,518
	Publishing	10,042
	Music, Performing, Visual-arts	9,317
	Advertising, Marketing	18,623
	Subtotal	44,141
Total		76,446
Total GVA of UK		1,923,440
Ratio of Cultural GVA		4.0%

（Source：DCMS（2020））

3. Australia

In Australia, an official CSA has not been prepared since the provisional estimate of "Australian National Accounts: Cultural and Creative Activity Satellite Accounts: Experimental" was published in 2014 by the Ministry of Culture's Statistics Group. Cultural GDP and other estimates published in 2014 are for 2008-2009.

Then, in 2018, "Creative and creative activity in Australia 2008-09 to 2016-17" was published by the Bureau of Communications and Arts Research (BCAR) of the Department of Communications and the Arts.

This cultural framework is based on the concept of cultural and creative activities. This framework consists of estimates based on 99% of the National Accounts and estimates outside the framework of 1% of the National Accounts.

The estimation method uses economic activity statistics, industry classification (ANZSIC), and occupation classification (ANZSCO), which are the bases of Australian SNA. These are reconstructed as CSA.

GDP in both cultural and creative areas was A$ 111.7 billion, or 6.4% of total GDP in the same period. The GDP of the cultural activity area is A$ 63.5 billion, which is 3.6% of the total GDP.

4. Canada

In Canada, the Department of Canadian Heritage created its own 2011 CFCS (Canadian Cultural Statistics Framework) based on UNESCO's 2009 FCS. Subsequently, the 2010 CSA was created and has been updated annually since that time. It is created and updated in collaboration with Statistics Canada (STATCAN).

The estimation method uses Canada's SNA (Canadian System of Macroeconomic Accounts) as the basic framework, and sets the cultural framework targeted by CSA using the North American Industry Classification (NAPCS) and North American Industry Classification (NAICS). Finally, it is estimated by subdividing the supply/use table (SUT) of 500 rows (commodities) x 250 columns (industry) using industrial statistics, cultural statistics, etc.

"Core cultural domain" and "cross-sectional domain" are determined for the domain structure. Including this structure, Canada's domain structure is in line with UNESCO guidelines (2009FCS).

Canada's cultural GDP is C$ 56.1 billion (2018), 2.7% of the country's GDP. The GDP for each domain is as follows.

[Table 4-3 Cultural GDP of Australia (2018)]

(unit: 1000 Canadian dollar)

	Domain (subtotal)	Sub domain	GDP
Core Culture	Cultural Heritage/Library (775,546)	Archives	19,217
		Library	90,990
		Cultural Heritage	455,549
		Natural Heritage	209,790
	Live Performance (2,944,041)	Performing Arts	2,773,767
		Festival/Celebration	170,274
	Visual art/Apply Art (10,911,265)	Original Visual Art	191,104
		Art Reproductions	44,272
		Photography	800,675
		Craft	2,665,470
		Advertising	2,223,469
		Architecture	1,558,314
		Design	3,427,962
	Written and Published work (8,452,278)	Books	983,904
		Periodicals	925,348
		Newspaper	1,595,880
		Other Published works	86,112
		Collected information	430,682

		Multi	4,430,352
	Audio-visual/Interactive media (19,715,028)	Movie/Video	4,275,782
		Broadcasting	9,136,805
		Interactive media	6,302,442
	Sound Recording (637,414)	Sound Recording	491,016
		Music Publishing	146,398
Other (12,623,993)		Education/Training	3,498,692
		Governance, funding and professional support	8,056,031
		Multi	1,069,270
Total			56,059,567

（Source：Statcan）

5. Germany

The Federal Ministry of Economics and Energy and the Federal Government Commissioner for Culture and Media publish an annual Monitoring Report (Culture and Creative Industries Monitoring Report). Estimates and monitoring reports are produced by the Leibniz Center for European Economic Research (ZEW – Leibniz Center for European Economic Research). In the monitoring report, basic numerical values are determined and estimates are made for each yearly theme. For example, a comparison of urban and non-urban areas of cultural and creative industries was made in 2018, and a comparison of "corporate rates" between cultural and creative industries and industry in general was completed in 2017.

The German CSA framework is an estimate of "cultural and creative industries". German SNA, VAT (value added tax) statistics, employment statistics and other statistics are used for estimation. Essentially, VAT statistics are utilized as the basis for determining the sales and transaction volume of companies in the cultural and creative industries. Cultural production is then extracted from these volumes. In particular, VAT statistics come from the credit invoice method adopted in EU member states, and can be grasped in a unified manner within the EU.

The annual estimates of the monitoring report express the importance (contribution) of the cultural and creative industries in the German economy, mainly by growth rate and share. In the 2019 monitoring report, the following expressions are used.

＜Number of Companies＞

256,600	Number of Cultural/Creative Industries
⬇	
7.8 %	Ratio of Cultural/Creative Industries

＜GDP＞

1,005 (100 million €)	GDP of Cultural/Creative Industries
⬇	
3.0 %	Ratio of Cultural/Creative Industries
⬇	
2.9%	Growth rate (year-on-year) of Cultural/Creative Industries

(Source：Federal Ministry for Economic Affairs And Energy, Federal Government Commissioner for Cultural and the Media (2019))

6. France

The Ministry of Culture's Department of Research, Development and Statistics (Département des études, de la prospective et des statistiques) estimates and publishes annually.

The French CSA framework is based on the method of determining cultural products and industries from the French national accounts. As in Germany, VAT (value-added tax) statistics, employment statistics, and other statistics are used for the calculation. Invoice information is used to determine the sales and transaction volume of culture-related companies from VAT statistics. This is a method of estimating the market sector. There is a separate non-market sector, which includes public cultural activities. The input method is used as the estimation method for this sector.

For the basic cultural divisions, the cultural statistics guidelines of the EU Bureau of Statistics (Eurostat) are referred to. All subdomains are linked to the industry classification code.

"The Direct Economic Impact of Culture in 2018" by the Bureau of Research, Development and Statistics summarizes the estimation results as follows.

> The direct impact of the cultural sector on the economy in 2018, that is, the added value of culture, was 47 billion euros (about 6.11 trillion yen). This is 2.3% of the country's GDP. This has not changed significantly in the last six years.
>
> The publishing / news domain has been declining remarkably, but it is maintained by the existence of the audio-visual field, which is the largest domain of cultural GDP (27.7% of the total), and the growth of visual arts and cultural heritage.
>
> Cultural employment is 670,000 (2017), which is 2.5% of national employment. The major domains of employment are the publishing (19%), visual arts (16%), and audiovisual (15%) sectors. One-third of cultural employment is self-employed, which is higher than the national self-employed ratio of 12%.

[Table 4-4 Cultural GDP of France (2018)]

Cultural Domain	Product		GDP (VA)	
	Value (billion €)	Ratio (%)	Value (billion €)	Ratio (%)
Audio-visual	31.8	33.1	13.0	27.7
Publishing/Press	16.5	17.2	7.2	15.3
Performing Arts	11.1	11.5	6.6	14.1
Publicity	11.9	12.4	5.8	12.3
Cultural Heritage	7.7	8.0	4.6	9.7
Visual art	8.3	8.7	3.8	8.1
Architecture	6.1	6.4	3.8	8.0
Cultural/Art Education	2.7	2.8	2.2	4.7
Total	96.0	100.0	47.0	100.0

(Source：Département des études, de la prospective et des statistiques (2020))

7. Mexico

The National Institute of Statistics and Geographical Information (Instituto Nacional de Estadística y Geografía; INEGI) has created a CSA. INEGI is the organization responsible for the Mexican census. In 2013, a CSA based on the 2008 SNA was compiled, and then in 2018, a CSA based on the 2013 SNA was created.

The current Mexican CSA is prepared with reference to UNESCO's FCS2009 and CAB (Convenio de Andrés Ballo) guidelines. The same North American Industry Classification (NAICS) as the United States and Canada is used for industry classifications. The domain structure is characterized by the inclusion of non-market domestic cultural production, the inclusion of sporting events in entertainment, and the variety of crafts, and sets a unique framework for cultural production.

Mexico's cultural GDP in 2018 is estimated at 702,132 million Mexican pesos[6]. This is equivalent to 3.2% of Mexico's GDP.

This GDP accounts for more than 50% of the total of the information / mass media sector and the manufacturing sector. In-house production (non-market sector) accounts for a quarter of the total.

The amount of cultural GDP has increased by about 60% in the last 10 years, but its ratio to total GDP is gradually decreasing. Mexico's GDP increased by about 90% during the same period.

Mexico has 1,395,669 persons in cultural employment (2018), which is 3.2% of total employment.

[6] The 2018 cultural GDP figures (702,132 million Mexican pesos) are based on materials released in 2019.

Chapter 5 Proposals for new cultural policies

Toward the utilization of cultural GDP estimation (CSA)

In this research, we focused on the estimation of cultural GDP, estimated the employment effect of culture, estimated the economic ripple effect, made an international comparison, and approached the experimental cultural GDP from the demand (consumption) side. All of these efforts were conducted under the umbrella of this research, "Survey research for the numerical evaluation of the economic and social impacts of cultural arts".

At the core of this basic theme, "Quantitative evaluation of economic and social impacts of cultural arts," is the estimation of cultural GDP comprises the core of the economic and social impacts of the cultural arts. This is clear even from looking only at the trends. This work and related work to date have been promoted based on this understanding. Progress and achievements with regard to CSA frameworks and estimations show that the following issues can be raised as basic issues for the utilization of cultural GDP estimation (CSA). In other words, cultural GDP estimation (CSA) is the foundation of EBPM for cultural policy. Moreover, it is a tool for promoting cultural policy, so we must enable it to be utilized effectively. To this end, the following are required.

(1) Increase the degree of perfection of national estimates as CSA’s
(2) Develop international standards
(3) Secure CSA's unique perspective
(4) Expansion and development of quantitative evaluations of the economic and social impact of cultural arts
(5) CSA updates
(6) Dissemination of information on CSA

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