

2023 Cultural Administration Research Survey

# A Quantitative Evaluation : The Economic and Social Effects of Culture

Summary



March 2024

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# 1

## Timeline of Cultural GDP Estimation in Japan

### Preparation and Trial Period

**FY2017**

- Estimation feasibility study (experimental study)  
Participation in UIS TAG\* meeting

**FY2018**

- Start of UNESCO-guideline-based estimation

**FY2019**

- Coordination with UNESCO (consultation with UIS),  
detailed case studies in other countries

### First Statistical Publication Period

**FY2020**

- Estimation of cultural GDP (2016-2018: 3 years)

**FY2021**

- Estimation of cultural GDP (2015-2019: 5 years)

### Revision and Utilization Period

**FY2022**

- 2019 estimate updates and initial estimation of cultural domains unique to Japan

**FY2023**

- 2020 estimate updates and initial estimation of related domains

\* UIS TAG: Technical Advisory Group of UNESCO Institute for Statistics

## 2

# Japan's Cultural GDP Estimation Method

## 1 Source of cultural product lists and identification of cultural industries

- Link to guidelines presented by UNESCO  
(United Nations product classification/industrial classification)



## 2 Estimation of production value of cultural products and allocation to industries

- Aligning Japan's industrial classification system with UNESCO guidelines
- Estimating production values using existing economic statistics

## 3 Estimation of value added

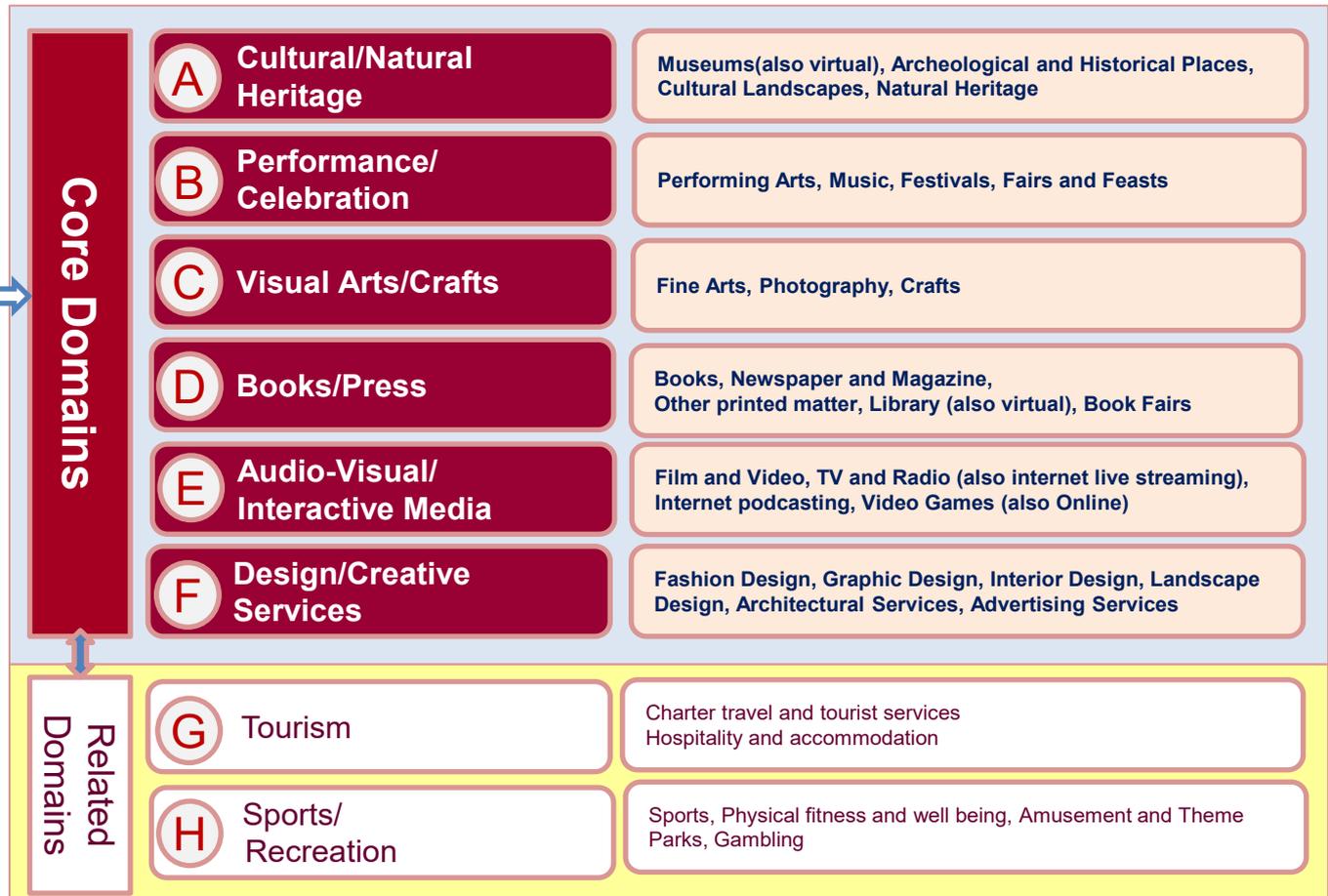
- Estimating added value using input-output tables
- [Domestic production value from industrial statistics, etc.]  
× [Value added rate from input-output tables]  
= [Value added (cultural GDP) ]

# 3

## Scope of Japan's Cultural GDP Estimates (Establishing Cultural Parameters)

Using FCS2009 as a guideline

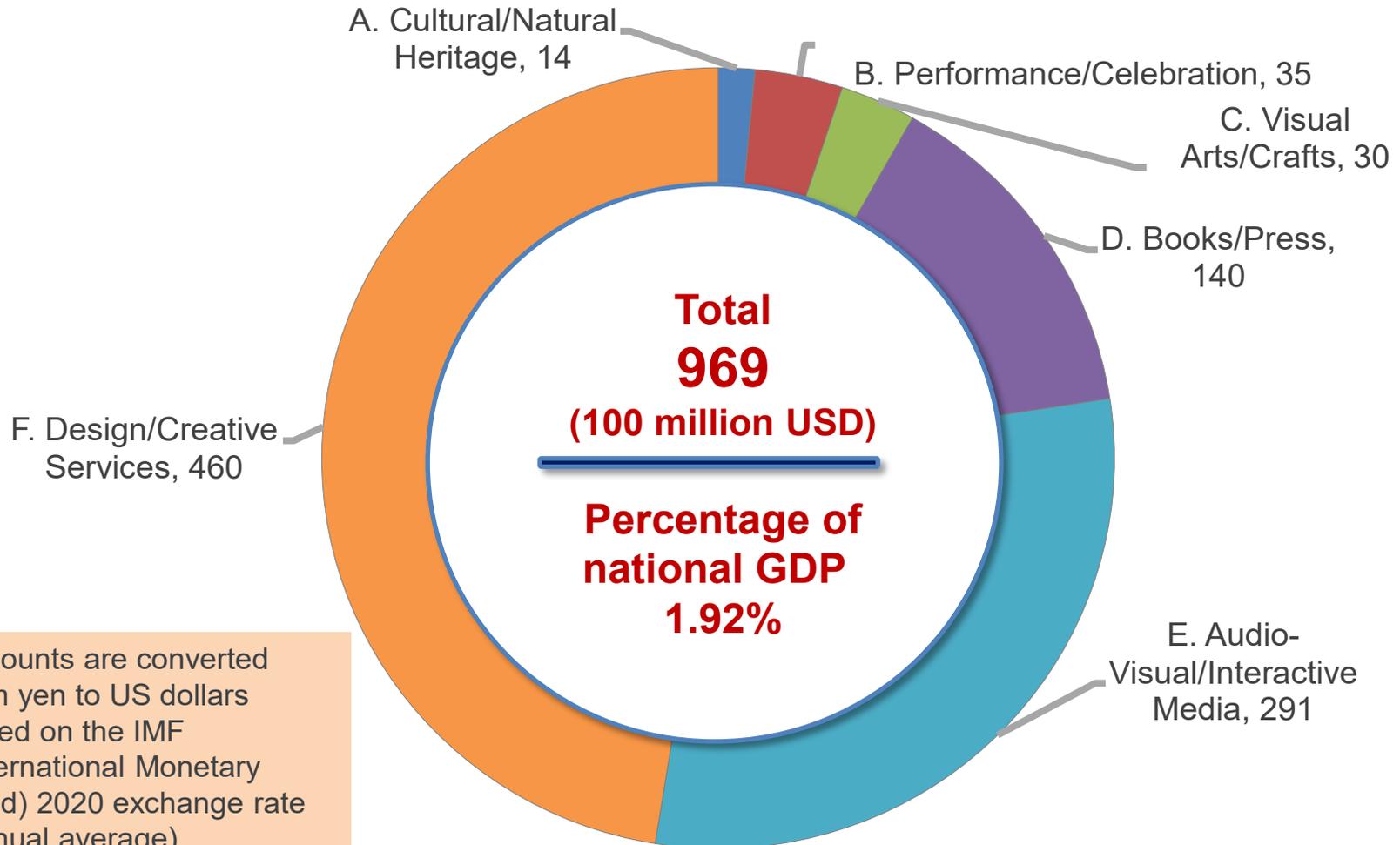
This estimation focuses on "Core Domains."



# 4

## The Cultural GDP of Japan

### 4-1 Scale and Composition (2020\*: nominal value)



Amounts are converted from yen to US dollars based on the IMF (International Monetary Fund) 2020 exchange rate (annual average). (The same applies below.)

\*The estimates for 2020 include additional estimates.

## 4-2 Trends in Cultural GDP (nominal value) by Domain

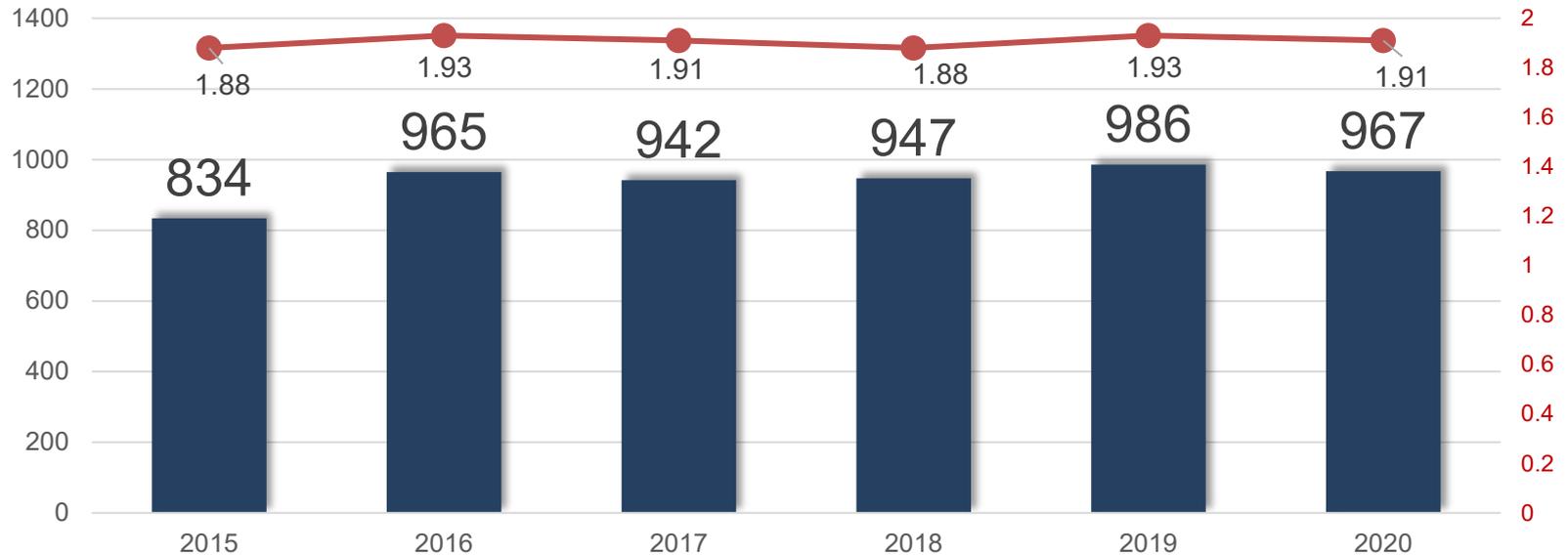
(100 million USD)

<b>Domain</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020*</b>
<b>A. Cultural /Natural Heritage</b>	<b>10</b>	<b>13</b>	<b>13</b>	<b>12</b>	<b>13</b>	<b>14 (+1.6)</b>
<b>B. Performance/ Celebration</b>	<b>48</b>	<b>55</b>	<b>50</b>	<b>55</b>	<b>62</b>	<b>35</b>
<b>C. Visual arts/Crafts</b>	<b>28</b>	<b>33</b>	<b>32</b>	<b>31</b>	<b>34</b>	<b>30</b>
<b>D. Books/Press</b>	<b>148</b>	<b>163</b>	<b>150</b>	<b>147</b>	<b>145</b>	<b>140 (+0.1)</b>
<b>E. Audio-Visual/ Interactive Media</b>	<b>234</b>	<b>266</b>	<b>265</b>	<b>268</b>	<b>278</b>	<b>291</b>
<b>F. Design/Creative Services</b>	<b>367</b>	<b>434</b>	<b>432</b>	<b>433</b>	<b>455</b>	<b>460</b>
<b>Total</b>	<b>834</b>	<b>965</b>	<b>942</b>	<b>947</b>	<b>986</b>	<b>969 (+1.7)</b>

\*The + indicates additional estimates included for 2020.

### 4-3 Changes in Cultural GDP

(Based on 2015: nominal value)



**Cultural GDP**

(Unit: 100 million USD)

■ Total of Cultural GDP (Left axis)

● % of Cultural GDP (Right axis)

**% of Cultural GDP**

\*To compare trends under the same conditions additional estimates for 2020 are not included.

(100 million USD)

National GDP	2015	2016	2017	2018	2019	2020
	44,449	50,037	49,308	50,409	51,180	50,556

# 5

## Cultural Employment

Number of Employees: 1,186,000 (2020)  
(1.74% of total employment)

### 5-1 Methodology

- The number of employees in the cultural industry is estimated using an input-output table.
- Multiply the "domestic production value" by the "employment coefficient."

### 5-2 Estimation

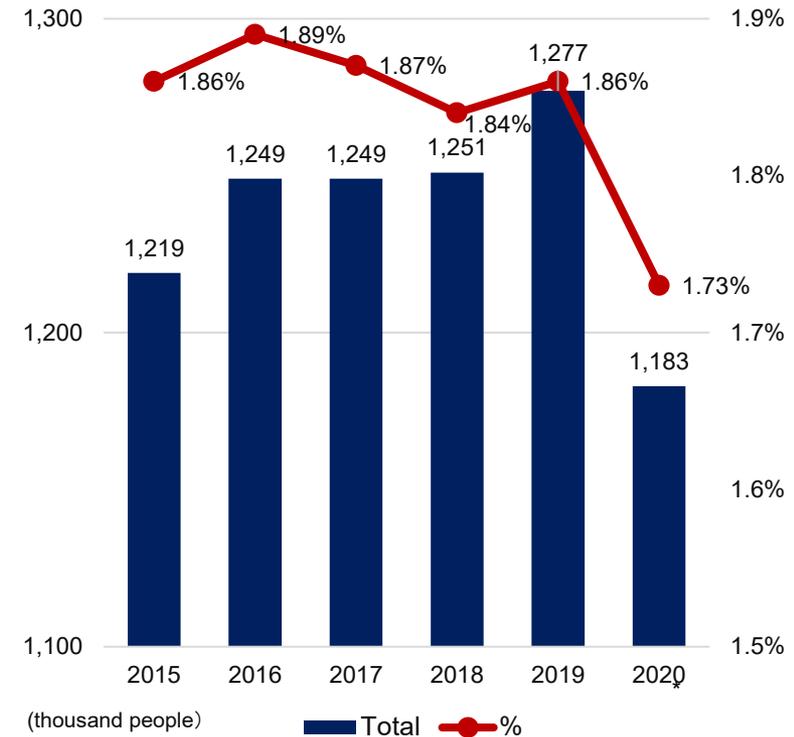
#### Changes of cultural employment by domain

(thousand people)

	2015	2016	2017	2018	2019	2020 <sup>*1</sup>
A. Cultural /Natural Heritage	32	34	35	34	35	37 (+3.6)
B. Performance/ Celebration	76	77	73	79	85	51 <sup>*2</sup>
C. Visual Arts/Crafts	91	96	96	94	100	82
D. Books/Press	260	250	236	233	226	193 (+0.2)
E. Audio-Visual /Interactive Media	239	245	248	251	257	241
F. Design/Creative Services	522	545	560	559	575	583
<b>Total</b>	<b>1,219</b>	<b>1,249</b>	<b>1,249</b>	<b>1,251</b>	<b>1,277</b>	<b>1,186</b> (+3.8)

\*1 The + indicates additional estimates included for 2020.

\*2 The decline in employment may be due to impact of COVID-19.



\*To compare trends under the same conditions additional estimates for 2020 are not included.

# 6

# Cultural Imports and Exports

Exports:**162** Imports:**297** (2020:100 million USD)

## 6-1 Methodology

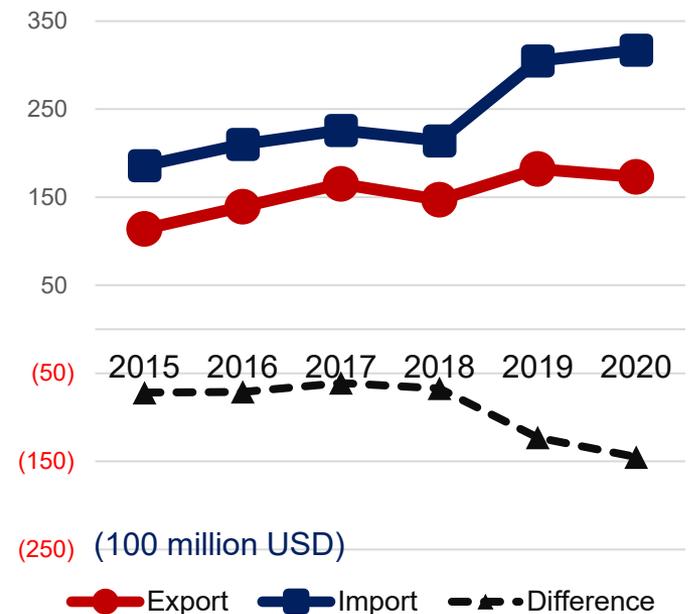
Estimates, based on UNESCO guidelines, use three statistical sources: I-O tables, Ministry of Finance trade statistics, and balance of payments statistics (Bank of Japan).

## 6-2 Estimates (2020)

(100 million USD)

Domain	Description	Export	Ratio (%)	Import	Ratio (%)
A. Cultural /Natural Heritage	Social education (Public), Social education (NPI), Antique	0.2	0.1	0.6	0.2
B. Performance/ Celebration	Entertainment facilities (except movie theaters)/Troupes Manufacture of musical instruments	14.3	8.9	12.6	4.2
C. Visual Arts/ Crafts	Paintings, Other visual arts Jewelry, Photography services	11.3	7.0	24.8	8.4
D. Books/ Press	Publication, Newspaper	1.7	1.0	2.8	1.0
E. Audio-Visual/ Interactive Media	Movie theaters, Public broadcasting, Private broadcasting	0.1	0.0	1.1	0.4
F. Design/ Creative Services	Civil engineering and construction services, Advertising services	103.9	64.3	188.8	63.5
Transverse domains	Other personal cultural and recreational services, Usage fee for copyright, etc. Audiovisual and related services	30.2	18.7	66.3	22.3
<b>Total</b>		<b>161.7</b>	<b>100.0</b>	<b>297.1</b>	<b>100.0</b>

[Reference] Trends in Japan's cultural import and export amounts (2015~2020: nominal value)



※Transverse domains: Content that spans multiple domains is classified as a transverse domain.

(Example) Audio-visual and related services: In addition to service transactions related to the production of movies, radio and television programs, and music recordings, this includes service transactions related to theater and music performances, sporting events, circuses, etc. (Venue fees, advertising expenses, payments to performers and producers, etc.)

# 7 Cultural Education GDP

Estimation targets: Cultural and artistic subjects in school education (elementary school through university and other tertiary education)

Estimation base year: The 2015 input-output table lists education production value into more detailed categories. Our estimate is based on this and multiplied by the growth rate up to 2020 for use as a trend estimation reference value.

(2015:nominal value: 100 million USD)

Category	Statistics used	Method	Production value	Value added (Cultural GDP)
1 Elementary school	Regulation for Enforcement of the School Education Act	① Extract the domestic production value of elementary schools, junior high schools, and public and private high schools from the input-output table ② Extract the ratio of culture and arts education to the total number of classes from the Regulation for Enforcement of the School Education Act or Curriculum Guidelines.	62	51
2 Junior high school			24	19
3 High school	Curriculum Guidelines I-O Tables	③ “① × ② = Domestic production value of culture and arts education” ④ “③ × added value rate = added value of culture and arts education”	9	8
4 University/Junior college	Basic School Survey I-O Tables	① Extract the domestic production value of universities and others (vocational and specialized training schools) from the input-output table ② Extract the ratio of students in culture and arts education related departments to the total number of students from the Basic School Survey ③ “① × ② = Domestic production value of culture and arts education” ④ “③ × added value rate = added value of culture and arts education”	13	11
5 Other (vocational and specialized training schools)			4	3
		Total	112	93

Category	2015	2016	2017	2018	2019	2020
Cultural GDP of cultural education	92.9	101.5	99.7	102.1	103.2	111.9

Note: School education includes special needs schools.

# 8

## Challenges and Prospects for Cultural GDP

- ✓ The estimation of Japan's cultural GDP based on the UNESCO guidelines is nearing completion. Since FY2022, we have experimentally developed and examined methods for estimating cultural GDP in Japan's unique cultural domains, such as tea ceremony and flower arrangement, as well as in related domains, such as cultural education.
- ✓ While continuing to estimate cultural GDP, it is important to consider how to create sustainable estimates while linking them to their characteristics and changes in industrial structure. Additionally, it is necessary to incorporate estimates that focus on consumption, and overseas production and trade.
- ✓ Although UNESCO guidelines exist, each country establishes a framework that aligns with the current state of its own statistics. Conducting a detailed analysis of the content and utilization status of cultural GDP in other countries remains a challenge.