2019 Cultural Administration Research Survey

A Quantitative Evaluation:

The Economic and Social Effects of Culture (3)

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Note 1: This survey was conducted under 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 members of the research council were commissioned by the Agency for Cultural Affairs.) “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 for which references are not shown are created by CDI and are primarily based on the sources listed at the end of this document.

Abbreviations

CAB	Convenio de Andrés Ballo
CPC	Central Product Classification
CSA	Culture Satellite Account
DANE	Departamento Administrativo Nacional de Estadística
EBPM	Evidence-Based Policy Making
FCS	Framework for Cultural Statistics
GDP	Gross Domestic Product
ILO	International Labour Organization
ISIC	International Standard Industrial Classification
NAICS	North American Industry Classification System
SNA	System of National Accounts
STATCAN	Statistics Canada
TAG	Technical Advisory Group, the UIS
TSA	Tourism Satellite Account
UIS	UNESCO Institute for Statistics
VA	Value Added

Introduction

1. Social vision and economic statistics

In 2003, the Japanese government made an official declaration of its intention to significantly increase tourism. In 2006, it enacted its “Basic Law on Promotion of Tourism” and in 2008, established the Japan Tourism Agency. In parallel with these developments, Japan’s Tourism Satellite Account (TSA) was being compiled.

When a national vision such as a TSA is launched, economic statistics are required as evidence for the formulation and promotion of policies aimed at its realization. This was true of the declaration of “2007 Strategies for an Environmentally Aware Nation” in 2007 and the environmental satellite account. The same applies to the current “growth strategy” priorities, namely medical and health, and the National Governor's Council's “Healthy Nation Declaration” and the creation of medical and health satellite accounts. Regarding medical and health satellite accounts, the United States has already compiled a Health Care Satellite Account (HCSA). In this way, economic statistics are almost always required when proposing a future vision for a social issue.

In the field of culture and the arts in Japan, the "Basic Policy on Promotion of Culture and Art-Creating a Future with Culture and Art Sources-(Fourth Basic Policy)" (May 22, 2015 Cabinet decision) proposes a social future of culture and art, "Creating the future with cultural and artistic sources and becoming a cultural and artistic nation." To realize this vision, both economic and cultural statistics are essential in providing a foundation and evidence for policies. This study, "A Quantitative Evaluation: The Economic and Social Effects of Culture", provides these vital statistics.

Cultural fields, however, are difficult to quantify compared to fields for which satellite accounts have already been compiled. The leader in this difficult challenge is the UNESCO Institute for Statistics (the UIS). Many countries in the UIS network are working on a “Quantitative Evaluation of the economic and social effects of culture” in the framework of compilation of the Cultural Satellite Account (the CSA).

In Japan, beginning with the “Study and Research Project on the Economic Scale and Economic Ripple Effect of Cultural Industries” conducted in 2015, this approach has been implemented in stages as a series of research projects and studies. (Table 1) The approximate size of the cultural industry in Japan was estimated through survey research in FY2015. In the research studies in FY2017 and FY2018, we constructed the CSA framework encompassing the realities of cultural and economic statistics in Japan, adapting it to the CSA model presented by UNESCO. We then conducted case studies and feasibility studies using more detailed estimates of cultural GDP. These studies were conducted with the advice and supervision of experts in culture, economy, statistics and other relevant areas.

Through these efforts, a Cultural Satellite Account (the CSA) employing quantitative evaluation methods for the economic and social efforts of culture in Japan has achieved results that conform to international standards. The future challenge lies in determining ways to promote a "cultural and artistic nation" by further developing, and measuring wide-ranging ripple effects on tourism promotion, regional revitalization, and cultural and educational industry development. To that end, it is necessary to develop a foundation for cultural and economic statistics centered on the CSA. The CSA is a fundamental source for such cultural policies.

Table 1 Background of studies for “A Quantitative Evaluation: The Economic and Social Effects of Culture”

FY	Title	Positioning	Overview
2015	“Study and Research Project on the Economic Scale and Economic Ripple Effect of Cultural Industries”	Preliminary Survey	(1) Examination of estimates method of cultural GDP and temporary estimation. (2) Research on economic ripple effects of culture
2016	—	—	—
2017	2017 Cultural Administration Research Survey A Quantitative Evaluation: The Economic and Social Effects of Culture	Case Study	(1) Research on estimation method of cultural GDP and framework of cultural satellite account (the CSA) (2) Estimates of cultural GDP for "movie", "tea ceremony", "sake", and "effect of Matsue Castle designated as a national treasure"
2018	2018 Cultural Administration Research Survey A Quantitative Evaluation: The Economic and Social Effects of Culture (2)	Feasibility Study	(1) Examination of the CSA by UNESCO model and temporary estimation of cultural GDP in Japan (2) Arrangement of remaining issues necessary for full-scale the CSA compilation and cultural GDP estimate

＊The Japanese versions: 2015, 2017 and 2018; and English versions: 2017 and 2018 of the survey reports can be referenced at the following URL.
https://www.bunka.go.jp/tokei_hakusho_shuppan/tokeichosa/bunka_gyosei/index.html
No survey was conducted in 2016.

2. Outline of the survey

In this fiscal year, we engaged in the survey of the following issues. These issues were set based on the results of previous surveys.

【Issue 1】Monitoring Japan's provisional estimate in 2018 based on international standards, completion of portions that have not yet been estimated, and improvement of completion.

(1) International monitoring of compliance with international standards

Verification of whether the estimation method of the previously estimated part conforms to the method recommended by UNESCO.

(2) Completion of portions not yet estimated

Confirmation of classifications and methods for estimating portions that cannot be estimated within the cultural framework recommended by UNESCO.

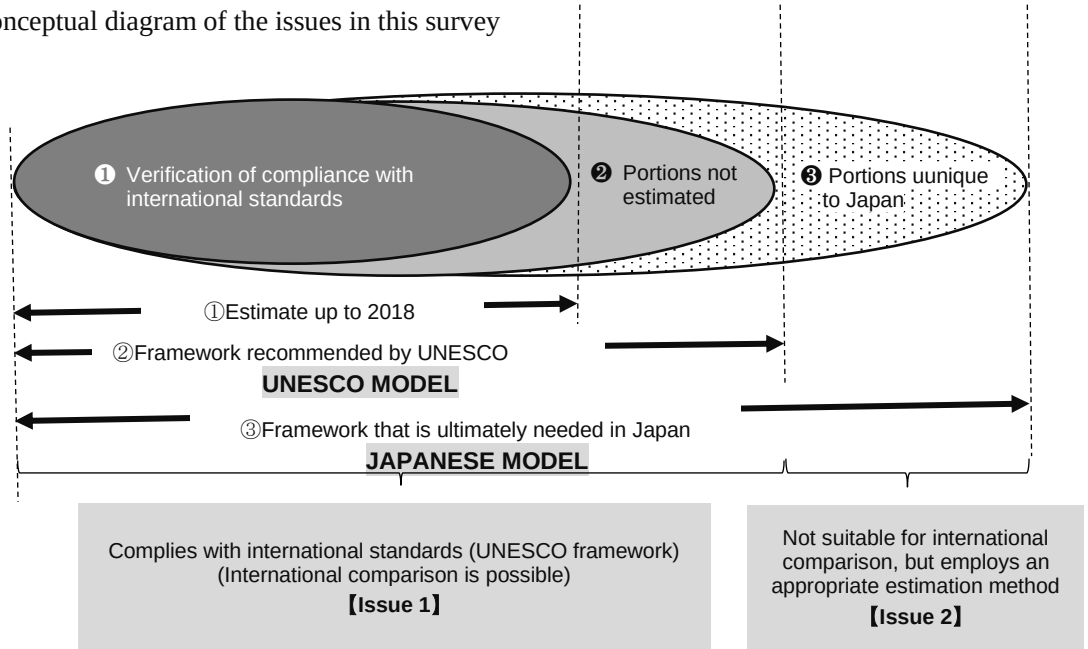
【Issue 2】Global feedback of Japan's approach to the CSA expansion for further enhancement of the CSA.

(3) Establishing (defining) portions unique to Japan and evaluating them

In the quantitative evaluation of culture required by Japan, it is necessary to add portions unique to Japan to the CSA framework presented by UNESCO. Evaluation and monitoring are required to determine whether the concepts and methods of quantification are appropriate for international standards.

By clarifying "Issue 1", it is possible to estimate cultural GDP that conforms to the international standards recommended by UNESCO (UNESCO model) and enable international comparison. In addition, by clarifying "Issue 2", it is possible to establish the larger framework of the CSA (Japanese model) required by Japan, and to estimate the unique portions of Japan's cultural GDP.

Figure 1 Conceptual diagram of the issues in this survey



3. Survey content and method

To achieve research objectives, we surveyed the current situation of two international institutions: the UNESCO Institute for Statistics (UIS) and the CAB (Convenio de Andrés Ballo) in Latin America, and two countries: Canada and Colombia, leading the development of CSA. The contents of the survey are shown in the table below.

Table 2 Survey targets and content

Survey target	Survey content
①UNESCO (UNESCO Institute for Statistics: UIS) ・An organization with international leadership in the CSA. It sets international standards and provides guidelines on methods to promote and improve the CSA. ・Currently, it is working on the revision of the existing CSA framework 2009FCS (2009 Framework for Cultural Statistics), and is drafting the 2017FCS. ・The headquarters is located in Montreal, Canada.	・Progress of 2017FCS draft revision work ・Confirmation of points and issues of revision work ・Future schedule ・Opinions on and evaluation of Japan's proposal to UNESCO
②Convenio de Andrés Ballo (CAB) ・This Latin American international educational and cultural institution similar to UNESCO, leads the CSA compilation in Latin America. Under this leadership, many countries in Latin America are working on a the CSA. ・ The secretariat is located in Panama City, Panama. (Relocated from Bogota, Colombia in recent years.)	・Background and current status of prior work on the CSA compilation ・Basic approach to intangible cultural heritage, traditional culture, unique culture and other aspects. ・Key issues in compiling the CSA ・the CSA and SNA consistency ・Details of the CSA compilation methods ・Consistency/inconsistency with UNESCO guidelines ・Significance of working in Latin America ・Practice country evaluation in Latin America ・Opinions on UNESCO's 2017 FCS draft ・Opinions on and evaluation of Japan's proposal to UNESCO
③Canada ・Statistics Canada and the Department of Canadian Heritage worked together to compile the CSA. ・They also play an important role in UNESCO technical consultations.	・Background and current status of work on the CSA compilation ・Basic approach to intangible cultural heritage, traditional culture, unique culture and other aspects. ・Key issues in compiling the CSA ・the CSA and SNA consistency ・Details of the CSA compilation methods ・Existence of unestimated fields and their reasons ・Consistency/inconsistency with UNESCO guidelines ・ Future schedule ・Evaluation of other working countries ・Opinions on UNESCO's 2017 FCS draft ・Opinion and evaluation on Japan's proposal to UNESCO

④Colombia ・Colombia is one of the first countries in Latin America to actively work on the CSA compilation and played a major role in the CAB.	・Background and current status of work on the CSA compilation ・Basic approach to intangible cultural heritage, traditional culture, unique culture and other aspects. ・Key issues in compiling the CSA ・Regarding consistency between the CSA and SNA ・Details of the CSA compilation methods ・Existence of fields not yet estimated and reasons ・Consistency/inconsistency with UNESCO guidelines ・ Future schedule ・Evaluation of other working countries ・Opinions on UNESCO's 2017 FCS draft ・Opinions on and evaluation of Japan's proposal to UNESCO

Table 3 Overview of surveys

Visit and date	Participant
①UNESCO Institute for Statistic (UIS) October 22, 2019 (Tue)	・Jose Pessoa （*Head of Unit,Culture and Communication*） ・Lydia Deloumeaux （*Associate Programme Specialist, Culture and Communication*） ・Brian Buffett （*Head of Section, I.T .Services*）
②Convenio de Andrés Ballo (CAB) October 1, 2019 (Tue)	・Delva Batista Mendieta （*Executive Secretary*） ・Marisa Talavera （*CAB*） ・Nisla Cecilia Ceballos Melendez （*CAB*） ・José A. Frías G. （*CAB*）
③Canada (Department of Canadian Heritage, Statistics Canada) October 23, 2019 (Wed)	・Demi Kotsovos （*Chief, Satellite Account and Special Studies, National Economic Accounts Division, STATICAN*） ・Catherine Ayotte （*Economist, Satellite Account and Special Studies, National Economic Accounts Division, STATCAN*） ・Jeremy Bridger （*Economist, Satellite Account and Special Studies, National Economic Accounts Division, STATCAN*） ・Guylaine Grenier （*Senior Policy Advisor ,Bilateral Relations Stragetic Policy and International Affairs, Canadian Heritage*） ・Mark McDonald （*Senior Research Officer, Policy Research Group, Canadian Heritage*） ・Nicole Frenette （*Director, Policy Research Group, Canadian Heritage*）
④Colombia（Ministry of Culture） September 30, 2019 (Mon)	・Christian Navarro （*Advisor, Information and Knowledge Line*） ・Pedro Figueroa （*Advisor, Information and Knowledge Line*） ・Nathaly Ruiz （*Advisor, Information and Knowledge Line*） ・Guido Alvarado （*Advisor, Information and Knowledge Line*） ・Verónica Henao （*Advisor, International Affairs and Cooperation*）

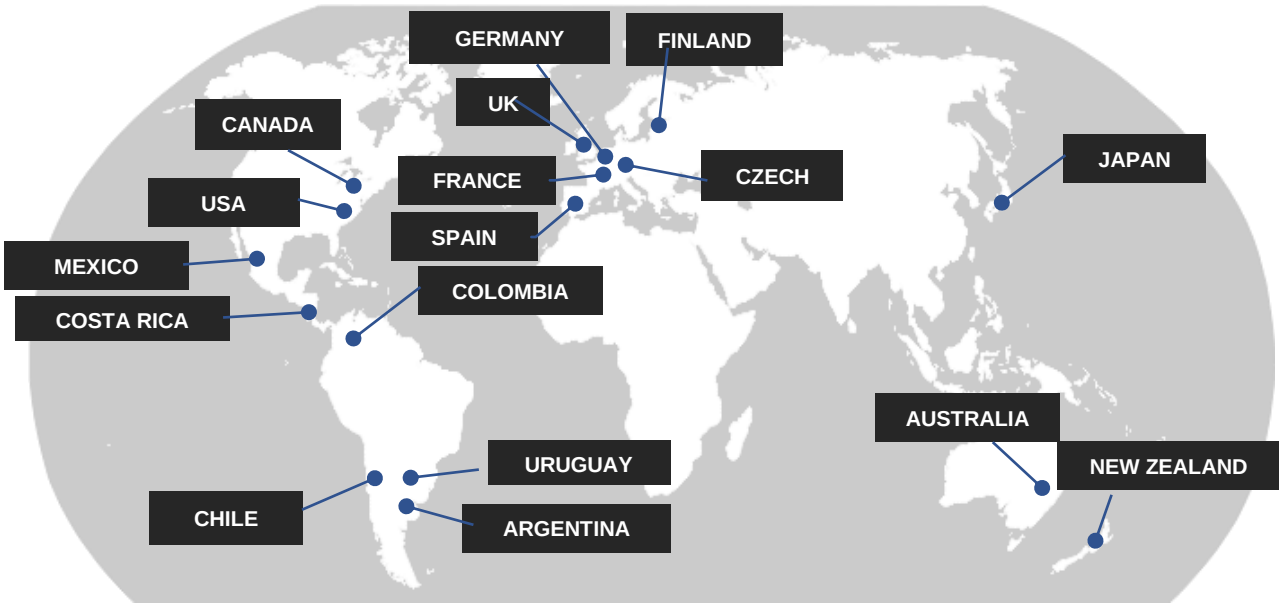
＜Researchers of international aspects＞ (Alphabetical order)

Person in charge (affiliation)	Target
AOSHIBA, Masaru (Policy Coordination and Policy Research Group Headquarters for Vitalizing Regional Cultures, Agency for Cultural Affairs)	CAB, Colombia
FUJIKAWA, Kiyoshi (Member of survey committee, (Professor, Nagoya University Organization for Asian Creative Education: Economic Statistics)	UIS, CAB, Canada, Colombia
KAWAI, Mitsuo (Communication Design Institute)	UIS, CAB, Canada, Colombia
OKUDA, Akimi (Policy Coordination and Policy Research Group Headquarters for Vitalizing Regional Cultures, Agency for Cultural Affairs)	UIS, Canada

Column 1　World CSA compilation status

Countries that have already compiled the CSA include North, Central and South American countries, some European countries, and Australia and New Zealand. The USA, Canada, Finland, Spain, Australia and New Zealand are based on the experience of compiling tourism satellite accounts (TSA), while the UK and France are based on creative industry theory. In Latin America (including Spain), the CSA was compiled under the leadership of CAB in collaboration with UNESCO.

Figure 2 World the CSA compilation status



Source: CDI based on the UIS and CAB sources

Of these compiled countries, some are continuously being estimated or revised, while others are stopped at some point. Some countries are also starting to compile. South America, such as Bolivia, Brazil, and Paraguay, and Portugal are in the process of being compiled.

Compiling the CSA is said to take at least 1-2 years. However, many countries take more than three years depending on their statistical environment, financial situation, and political situation. In some cases, efforts may not be continued.

As shown in the map above, no Asian country is working on the CSA compilation. Japan is the first country. Some Asian countries have begun to consider developing cultural statistics, but are still far from compiling the CSA.[1]

[1] Information provided by the UIS. In this consultation with the UIS, the UIS evaluated that it was desirable and meaningful that Japan support the compilation of the CSA in other Asian countries and areas.

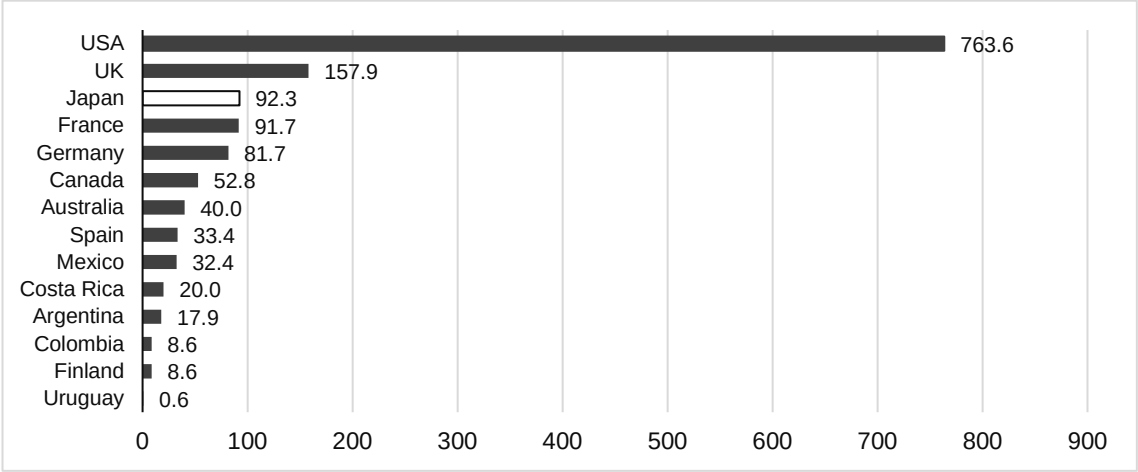
Column 2　Cultural GDP in the world

The figure below compares the cultural GDP of each country based on the data published by each country. However, it is important to keep in mind that the composition of the CSA domains (areas) varies from country to country, as shown in “Column 3: Domain establishing in the world” (p.17-18).

The USA, the UK, and Australia use the concept of "creative industries" to broaden the scope of cultural industries. These countries also include manufactured goods such as clothing and furniture. For this reason, the service and manufacturing industries are more widely incorporated as cultural industries than other countries. In Finland, recreation departments such as amusement parks are incorporated, and the range is wider than the UNESCO model.

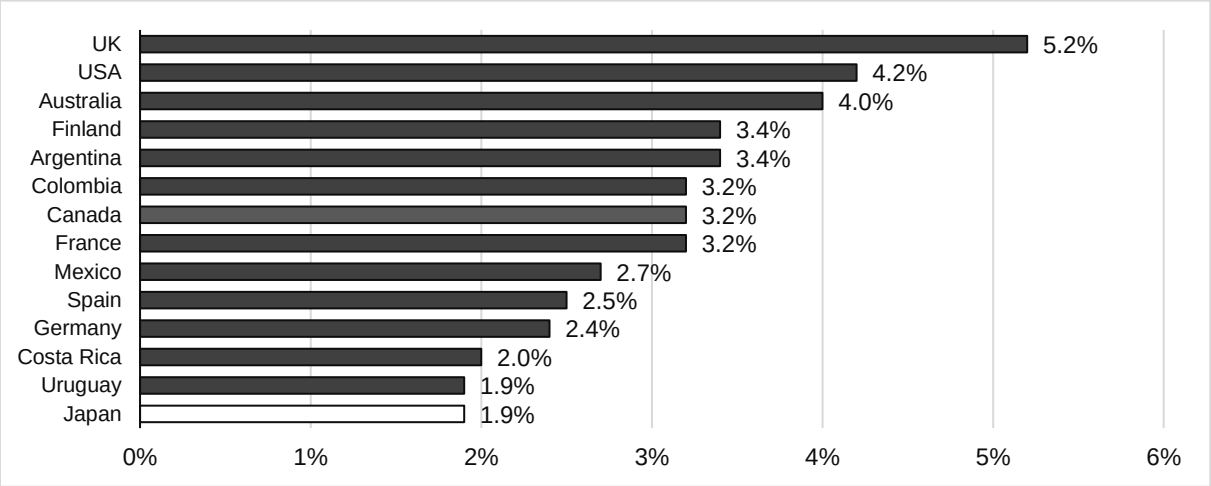
In addition to these differences in concept and scope, it should also be noted that countries have different estimated years. With these in mind, the chart below can be viewed as a rough overview.

Figure 3 Cultural GDP of each country　(Unit: 100 million USD)



Source: Created by CDI based on reports from the UIS, CAB, and countries

Figure 4 Cultural GDP as a percentage of national GDP in each country



Source: Created by CDI based on reports from the UIS, CAB, and countries

Table 4 Ratio of cultural GDP to total national GDP in each country

Country	Ratio of cultural GDP to national GDP (%)	Year of estimate
UK	5.2	2014
USA	4.2	2015
Australia	4.0	2009
Argentina	3.4	2011
Finland	3.2	2017
France	3.2	2011
Colombia	3.2	2018
Canada	3.2	2017
Mexico	2.7	2012
Spain	2.5	2012
Germany	2.4	2010
Costa Rica	2.0	2014
Uruguay	1.9	2008
Japan	1.9	2016

Source: Created by CDI based on reports from the UIS, CAB, and countries

As described below, the estimated value of Japan's cultural GDP is a "temporary estimate" because it does not estimate all constituent domains of the UNESCO model. However, estimates for major fields have already been made. Therefore, by estimating cultural GDP as shown in these charts, the relationship between culture and economy can be quantified and understood, and further compared internationally.

It can be seen that the characteristic of Japan is that, compared to other countries, the value of cultural GDP is high, but the ratio to GDP is low. Furthermore, by inferring from these figures the reason why Japan's figures are like this and why they have such characteristics, the relationship between culture and economy can be seen more deeply.

The various results that can be obtained from such international comparisons are based on the relationship between culture and economy, or the social positioning of culture. This will be the basis for the planning and evaluation of Japan's cultural policy in the future. Since this base is quantified, it serves as a concrete and easy-to-share index. This is the significance of the CSA compilation.

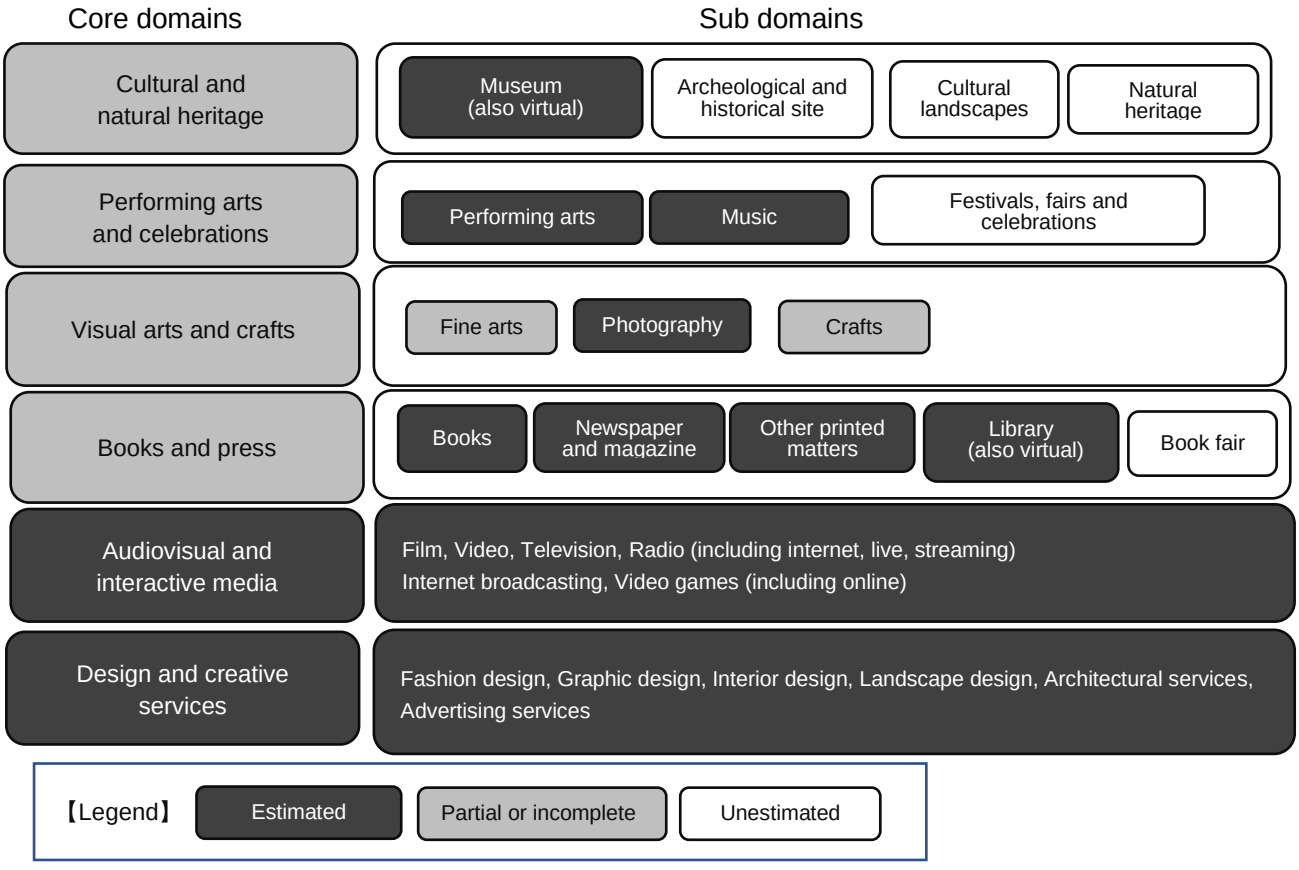
Chapter 1: Basic the UIS Policy

1. The UIS policy on compliance with international standards

1.1 Outline of issue 1

Figure 5 shows the estimated situation of Japan's cultural GDP in 2018 survey according to the cultural framework shown by UNESCO. At present, the estimate of Japan's cultural GDP does not completely cover the UNESCO cultural framework as shown in this figure. It is necessary to continue estimating the unestimated portions and the incomplete sectors so that the estimates of Japan's cultural GDP can be internationally compared with higher accuracy.

Figure 5 Estimated status of cultural GDP in 2018 survey



Source: 2018 Cultural Administration Research Survey "A Quantitative Evaluation: The Economic and Social Effects of Culture (2)" (CDI)

The reasons for unestimated portions in the estimate of cultural GDP in 2018 survey are as follows.

Table 5 Unestimated domains and reasons

Domain	Status	Reasons
①Archeological and historical site	Unestimated	❶ Area definition problematic ❷ Estimate methods not determined ❸ Lack of relevant data （④ and ⑤ are mainly definition problems）
②Cultural landscapes		
③Natural heritage		
④Festival, fair and celebration		
⑤Book fair		
⑥Fine arts	Partially estimated	❶Art market structure differs from that used in other CSA and data is lacking

Source: 2018 Cultural Administration Research Survey "A Quantitative Evaluation: The Economic and Social Effects of Culture(2)" (CDI)

1.2 Issues regarding frameworks and methods

The problems related to the unestimated portions can be broadly divided into cultural framework and estimate method issues.

A. Examples of cultural framework issues

(1) To what extent do UNESCO's "festivals, fairs, and celebrations" specifically include?

(2) The "book fair" subdomain is a less common area in Japan. How is this domain processed?

(3) What is the classification/range of "Archeological and historic sites", "Cultural landscapes", and "Natural heritage"?

(4) To what extent does the "crafts" domain include products?

B. Examples of estimate method issues

(1) How can we clarify methods for estimating the cultural GDP of "Archeological and historic sites", "Cultural landscapes", and "Natural heritage" that are not goods traded in the market?

(2) How can we refigure the processing method for fine arts detailed in the UNESCO model to suit the product data of Japan? How can we apply the UNESCO methods to the Japanese art trading system.

1.3 The UIS's view on the framework

It is the UIS that presents international rules and standards regarding international frameworks and methods for the issues mentioned above. Through discussions with the UIS, the following points became clear.

(1) The UIS's FCS is a flexible framework

The positioning of the cultural framework presented by the UIS is shown in 2009FCS. The 2009FCS is designed to be adaptable to the situation of each country, and can correspond to the country to country variation in statistical availability. The flexibility of FCS presented by UNESCO remains unchanged after the revision.

The cultural framework presented by the UIS, which is the standard for the CSA in many countries around the world, is not a "rule" that must be observed, but a "guideline" that should be kept in mind. Although the UIS recommends that each country compile the CSA according to the guidelines, in actual CSA compilation, each country can compile the CSA in conjunction with situations and conditions presenting in their cultural environments.

With regard to the above, the supplementary perspective of the UIS is as follows.

The UIS Perspective

The ability to collect and enhance cultural statistics varies greatly depending on the policy priorities of each country, the level of statistical expertise, and the extent and level of human and financial sources involved. Therefore, UNESCO's FCS is designed to flexibly adapt to the various situations of each country.

In a country that does not have a sufficient cultural framework in domestic statistics, the basic structure of FCS may not be traced strictly, so it should be incorporated as appropriate. On the other hand, in countries with high statistical capacity and well-established statistical environments, more detailed statistics are collected using more finely tuned or specialized statistical tools to reflect policy priorities in culture. By doing so, a more accurate CSA can be created.

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.

(2) Basics for international comparison

The 2009FCS has a flexible framework that makes it easier for each country to compile a CSA. However, if it is too flexible and each country creates its own CSA, international comparison will not be possible. Flexibility and international comparability are contradictory factors.

In this regard, the UIS seeks to ensure international standards by linking the CSA to existing international statistical classification systems. In other words, the UIS seeks to ensure comparability and standardization of levels in industries and products that connect with cultural domains, rather than the interpretation of cultural domains.

The UIS Perspective

The 2009FCS includes all existing relevant international statistical classification systems and standards. Therefore, it is possible to compare data between countries and make the best use of existing research to measure culture. These classification systems provide a comprehensive framework for collecting and disseminating cultural data in each country. It can also serve as a guideline for measuring cultural activities, goods and services using standard economic statistics and labor force surveys, censuses and household surveys.

(3) The 2009FCS is not the final version

From the UIS's perspective, the 2009FCS is not the final version and should continue to be improved. Therefore, it is necessary to continue to promote the development of FCS through international cooperation and the efforts of each country.

The UIS Perspective

The 2009FCS 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.

The current 2009FCS provides a conceptual basis for evaluating the economic and social contribution of culture. It also serves as a tool to help UNESCO member countries promote the collection and dissemination of cultural statistics. The 2009FCS will also enable the creation of national and international data for use by a global community of cultural data users such as UNESCO and many international organizations.

1.4 The UIS opinions on the CSA framework and methodology in Japan

(1) Archeological and historical sites, cultural landscapes, cultural and natural heritage

Classifications and definitions differ depending on the legal system and concept of each country. Each country can set the framework depending on its legal system or concept. The estimation method for this domain is still under discussion at the UIS, and it is necessary to observe the progress and respond accordingly. However, since the input method assumed in the UIS is the estimation method used for public services such as museums and libraries, it is appropriate to use this method for estimates at this stage. In countries around the world, this input method is used in cultural heritage domains as well as museums and libraries.

(2) Festival, fair and celebration

The specific content of this domain varies from country to country. Each country should define and code this subdomain to determine whether it should be included in the international or domestic version of the CSA.

(3) Book fairs

This subdomain may be deleted if it does not fit the actual situation of the country.

(4) Fine arts

It was suggested that the estimation method may be adapted to the actual situation in each country. In Japan, the applicable economic statistics in this field are insufficient, and the estimate in FY2018 was treated as a provisional one. For the time being, it is necessary to study more elaborate estimation methods while responding to the estimation methods of FY2018.

(5) "Architectural services (architectural design)" and "textile design" in the design domain

In Japan, the architectural design industry is integrated in the form of a so-called “general contractor”, which is a major building industry. In addition, fashion design and textile design are often internal tasks of apparel manufacturers, and it is difficult to separate them. However, for these subdomains as well, there was a suggestion that a method may be developed according to the actual situation and statistical environment of each country, or that each country may use a method suited to the actual situation.

(6) Crafts

The production data of various products (commodities) exemplified in the “Crafts” domain of the UNESCO framework cannot be extracted from industrial statistics in Japan. The only item that can be extracted from this domain is "jewelry". However, it is clear that in Japan there is a wide variety of "crafts" including traditional ones. In the FY2018 estimate, pottery painting, cloisonné, Japanese paper and many other example of applied art, which are considered to be important as crafts in Japan for which data can be extracted, have also been added to the estimate. If concrete products that differ from country to country are put into or taken out of the framework, problems may arise in international comparison. However, in this regard, the UIS's view was that it was inevitable.

In addition, as mentioned above, this did not cause the results to change significantly, and the view was that it would function within the “flexibility” of the framework.

Regarding crafts, the 2009FCS reference materials list a large number of metal crafts, pottery, textiles, wood crafts, basket weavers, etc. These are based on internationally traded items. However, in the current revision work, there is a tendency to limit these items. However, rather than products, manufacturing methods (hand-crafting, mechanical production, mass production, etc.) are being discussed.

The background of this discussion may be related to the International Labour Organization (ILO). There are many people who are engaged in handicrafts in the world, and this cannot be ignored from the viewpoint of employment in developing countries. In Mexico, where crafts make up a large proportion, crafts are very important, and in Colombia, a subdomain called "toys" is used. Conversely, many European countries do not put craft into the cultural realm. In France, there is a category called “art craft”, but this is limited to products that are purely art-related. In Japan, there is no appropriate product classification equivalent to CPC. Also, when using trade-related product categories, work is required to adapt them to the product categories.

Due to these factors, discussion on craft is ongoing, and it is necessary to make an estimate while paying attention to future trends and keeping in line with Japan's statistical realities.

（7） Supplementary explanation

In this study, the UIS pointed out that the issues noted by Japan involve domains that were challenging during CSA development (traditional festivals, traditional crafts and other “non-market” indicators). Discussions on these issues are ongoing. According to UIS comments, these findings and issues Japan raised, mainly regarding the framework, will be included in their revision discussions.

The input method is also used for estimating intangible cultural heritage and various public sectors. Japan's estimates also use this method for public sector museums and libraries.

The method for estimating intangible heritage suggested by Japan is still being tested. As for other satellite accounts, such as environmental satellite accounts, TSA, health care satellite accounts and NPO satellite accounts, it is thought necessary to first verify this method by using it as a reference. The UIS also states that accurate estimation of “non-market inputs” is one of the challenges they have identified in taking the CSA to the next level of development.

2. UIS policy on establishing specific and domestic domains

2.1 Why is the specific and domestic domain necessary?

(1) View of this survey

In the previous section, we examined how to adjust concrete content while maintaining the cultural framework recommended by UNESCO. This section looks at attempts to further expand the cultural framework recommended by UNESCO. In order for the CSA to function as a more effective tool for numerically evaluating the economic and social impacts of culture in line with the overall conditions and realities of Japan's culture, it is necessary to expand the cultural framework. This is one of the main views of this survey.

In particular, areas related to "intangible culture" should be emphasized as new areas. One example of this is "Japanese cuisine (*Washoku*) " (Japanese cuisine as living traditional Japanese culture). “Washoku” is registered as an intangible cultural heritage by UNESCO. In addition to the above, the world's registered intangible cultural heritage includes French gastronomy, the Mediterranean diet, Mexican, Malawi and Tajikistani traditional dishes, Turkish coffee culture and traditions. These target intangible traditions and customs, and do not recognize ingredients, or resulting foods, as culture.

An example of intangible cultural heritage other than food culture, is festivals and fairs. In Japan, many festivals such as Gion Festival in Kyoto and the Hakata Gion Yamakasa event are registered as UNESCO Intangible Cultural Heritage. Various traditional performing arts and customs/folklore are going to be added to the list. In addition, Japan has areas of "lifestyle culture" such as tea ceremony, flower arrangement, kimono and much more.

In order to adapt the CSA to the actual situation in Japan, it is necessary to consider these areas as culture, quantify them and add them to the framework of culture. In fact, Latin American actors such as CAB and Colombia are trying to incorporate food as a culture into the CSA. This survey recommends quantifying the value of intangible culture such as food culture and estimating the cultural GDP as a part of the CSA.

(2) View of the UIS

The UIS recognizes that in many developing countries, culture is mainly intangible. In order for the CSA to cope with cultural diversity, the UIS recognizes that it is necessary to appropriately incorporate such intangible culture into the CSA, and the UIS is sympathetic to the view of this survey.

Behind such UIS recognition is the process that resulted in the 2009FCS. Originally, prior to the 2009FCS, there was the 1986FCS[2], but because the review of the 1986FCS was devised mainly by developed UNESCO member countries, the intentions of developing countries were not well reflected. The 2009FCS, an updated version of the 1986FCS, corrects this point and takes into account the needs of developing countries. A specific feature of the 2009FCS is the recognition that it is appropriate to incorporate elements such as intangible cultural heritage and non-market economies. At the same time, it is also characterized by its thorough consideration of feasibility and cultural diversity.

[2] For the differences between 1986FCS and 2009FCS, see, for example, *Nagasawa* (2014).

However, regarding intangible cultural heritage, there is no suitable economic product or activity that can be targeted/quantified by the CSA, so it tends to be excluded from the CSA estimate at the stage of methodological study. It is because of this background that the UIS is attentive to the positive approach to intangible culture and lifestyle culture that is reemphasized in this survey.

Discussions on intangible culture continued at the 2018UIS/TAG Kamakura Meeting in Tokyo. In addition, at this meeting, a study (2017 Survey) on methods from Japan was presented. This process has revived the debate about intangible culture.

2.2 Establishing specific domains in domestic versions of the CSA

If, however, each country adds its own domain using its own framework and standards, international comparison becomes impossible. In fact, such a situation occurred with the environmental satellite account when the estimation standards differed from country to country, making it impossible to make international comparisons. Eventually, from the perspective of the global community, its utility was lost.

In order to avoid such a case, it is possible to establish two versions, one for international comparison and a second for domestic policy. In fact, the UIS already recognizes these two versions. For the domestic version, the classification and methods may be more flexible, but for the international version, it is necessary for estimates to adhere to some standards or guidelines. In addition, in the international comparison, it is necessary to clearly describe how each country applied the framework recommended by UNESCO.

The UNESCO framework is designed to enable international comparisons. At the same time, this framework aims to function as a flexible model that attempts to integrate the different cultural perspectives of each country. The framework can be used flexibly with modifications in ways that reflect the circumstances and perspectives of each country provided caution is used when making international comparisons.

Also, when adding a new domain to the domestic policy version of the CSA, strict coding must be used to organize data in a specific way. This is important to avoid double counting and overestimations.

Column 3　Domain establishing in the world

The establishment of a cultural framework (FCS) by and for the CSA precedent countries are based on UNESCO FCS in many cases. However, there are countries that are not so. The diverse is as shown below.

Table 6 Domain comparison of the CSA in preceding countries ①

CANADA	UK	MEXICO	AUSTRALIA
1. Heritage and libraries 2. Live performance 3. Visual and applied arts 4. Written and published works 5. Audio-visual and interactive media 6. Sound recording 7. Education and training 8. Governance, funding and professional support 9. Multi-domain	1. Advertising and marketing 2. Architecture 3. Crafts 4. Design: product, graphic and fashion design 5. Film, TV, video, radio and photography 6. IT, software and computer services 7. Publishing; 8. Museums, galleries and libraries 9. Music, performing and visual arts	1. Visual arts and photography 2. Performing arts 3. Music and concerts 4. Books, printing, and news 5. Audiovisual 6. Crafts and traditional games 7. Design and creative services 8. Heritage 9. Transversal	1. Museums 2. Environmental heritage 3. Libraries and archives 4. Literature and print media 5. Performing arts 6. Design 7. Broadcasting, electronic or digital media and film 8. Music composition and publishing 9. Visual arts and crafts 10. Fashion 11. Other culture good manufacturing and sales 12. Supporting activities

SPAIN	FRANCE	NEW ZEALAND	COSTA RICA
1. Heritage 2. Archives and libraries 3. Books and press 4. Visual arts 5. Performing arts 6. Audiovisuals 7. Interdisciplinary 8. Information technology 9. Advertising	1. Performing arts 2. Heritage 3. Visual arts 4. News 5. Books 6. Audiovisual 7. Advertising 8. Architecture 9. Cinema 10. Industries of image and sound 11. Access to culture and knowledge	1. Taonga Tuku Iho 2. Heritage 3. Library services 4. Literature 5. Performing arts 6. Visual arts 7. Film and video 8. Broadcasting 9. Community and government activities 10. Sport and recreation 11. Natural environment	1. Literary, musical and theatre creation 2. Performing Arts 3. Visual Arts 4. Editorial 5. Audiovisual 6. Music 7. Design 8. Games and Toy Shops 9. Material Heritage 10. Intangible Heritage 11. Natural Heritage 12. Advertising, and Artistic and Cultural Education

USA	COLOMBIA	FINLAND
<u>Five core domains:</u> 1. Museums, libraries and cultural centers 2. Live performance and music 3. Visual arts 4. Written works 5. Audio-visual and interactive media <u>Two Applied Arts and Design Services Domains:</u> 1. Advertising services 2. Other design services <u>Three Transversal Domains</u> 1. Education 2. Government, funding and professional support services 3. Infrastructure	1. Visual arts 2. Performing arts 3. Tourism and cultural heritage 4. Education 5. Books 6. Music 7. Audio visual 8. Digital media 9. Design 10. Advertising	1. Artistic, theatre and concert activities 2. Libraries, archives, museums etc. 3. Art and antique shops 4. Production and distribution of books 5. Newspapers, periodicals and news agencies 6. Production and distribution of motion pictures and videos 7. Manufacture and sale of musical instruments 8. Sound recordings 9. Radio and television 10. Printing and related activities 11. Advertising 12. Architectural and industrial design 13. Photography 14. Amusement parks, games and other entertainment and recreation 15. Manufacture and sale of entertainment electronics 16. Organization of cultural events and related activity 17. Education and cultural administration

Source: "Measuring the Economic Importance of Culture: An Examination of International Methodologies" (Department of Canadian Heritage 2016)

The table below shows a comparison of these. The years they were created are not consistent.

Figure 6 Domain comparison of the CSA in preceding countries ② (The shaded area is the target for the estimate.)

Domain	USA	Canada	Australia	Finland	UK	Spain	Mexico	Costa Rica	France	Japan
Live performance (Music)	■	■	■	■	■	■	■	■	■	■
Management of performing arts	■		■	■	■	■	■	■	■	■
Fashion design	■	■	■		■	■	■	■	■	■
Clothes/product			■			Uncertain	■	■	■	
Clothes/ wholesale and retail			■			Uncertain	■	■	■	
Crafts	■	■	■		■		■	■	■	■
Jewelry/design	■	■	■		■	■	■	■	■	■
Jewelry/product	■		■		■	Uncertain	■	■	■	■
Jewelry/wholesale and retail			■			Uncertain	■	■	■	
Computer service for motion picture and sound recording	■ Note1）	■	■	■	■	■	■	■	■	■
Landscape and architectural services	■	■	■		■	■	■	■	■	■
Sales of toys and games				■			■	■		■
Gambling				■						
Volunteering	■ Note 2）		■				■	■		
Book/software	■ Note 3）	■ Note 4）	■		■	■	■	■	■	■
Infrastructure	■ Note 5）		■ Note 6）				■	■	■	
Translation services		■			■	■	■	■	■	
Advertising	■	■	■	■	■	■	■	■	■	■
Industrial design	■	■	■	■	■	■	■	■	■	■
Musical instrument products	■		■	■	■	■	■	■	■	■
Musical instrument wholesale	■			■		■	■	■	■	■
Musical instrument retail	■			■		■	■	■	■	■
Sports		■		■		■				
Trade	■			■	■ Note 7）	■	■	■		

Note 1) Limited to video games and art related software such as photo editing and CAD software.
Note 2) Only in 2013.
Note 3) Limited to games and art related software such as photo processing software.
Note 4) Limited.
Note 5) Limited to art and cultural facility construction.
Note 6) Only the cultural/creative part.
Note 7) Service export only. It does not include the export of goods.
* "Uncertain" No response to the inquiry from the Canadian Department of Cultural Heritage.

Source: Made by CDI based on "Measuring the Economic Importance of Culture: An Examination of International Methodologies" (Department of Canadian Heritage 2016)

2.3 Specific domain estimation methods

Lifestyle culture, such as food culture, is often intangible culture, so it is difficult to quantify using the conventional the CSA method recommended by the UIS. UNESCO's 2009FCS incorporates the area of intangible culture as “Transversal domains”. However, the specific estimation method is recognized as being in a shelved state or already incorporated into another domain as a tangible cultural product, in advance or automatically. The ideas that traditional techniques are included in crafts, and traditional performing arts and music performed at festivals are included in performing arts are examples of this. Even in leading countries, this domain is not emphasized.

For this reason, we find the estimation of intangible culture is not being actively promoted by the UIS. This is because conventional methods cannot be used and attempting to estimate from the production side is difficult,.

In the 2017 survey, an attempt was made to estimate the cultural GDP of tea ceremony, which is a “lifestyle culture” close to intangible culture. The process of this estimation was as follows.[3]

(1) A survey of the consumption by people who engage in tea ceremony activities. (Sample survey)
(2) Extraction of tea ceremony activity population and activity frequency. (Social life general survey, etc.)
(3) Estimating final consumption by tea ceremony activities. ((1) x (2))
(4) Conversion of consumption to production using the Leontief inverse matrix.
(5) Estimated value added from production value.

The UIS's views and evaluations on this method were as follows.

The UIS Perspective

(1) This consultation has just begun and requires further discussion in the future. Depending on the results of the consultation, there may be an approach from the demand side as well as the production side for certain domains. Currently, the UIS recognizes the problem and that there is no definite answer regarding a method to deal with it.

(2) Ideally, UNESCO could include this issue in its recommendations if it is discussed in the future and international standards are established. It may be necessary to provide guidance for each country.

(3) There are costs in maintaining and implementing festivals which can be used for production side estimate. On the other hand, at a festival, people consume food, providing consumption side data. The festival has both aspects. At this stage, there is no conclusion as to whether to estimate the festival production value alone, or both production and consumption. At least for the time being, Japan is the only country capturing festivals and

[3] For details, refer to the "2017 Cultural Administration Research Survey　A Quantitative Evaluation: The Economic and Social Effects of Culture” (2018 CDI)

other intangible cultural heritage data from the demand side. However, we acknowledge the importance of this issue and the possibilities of such an approach. This Japanese proposal is innovative and, if successful, will be the first to be implemented in the world.

(4) The major challenge of this theme is that the CSA needs to stay within the scope of the SNA. Therefore, the CSA approach has to be more rigorous. The CSAs outside SNA are not so important for the very reason that they fall outside the mainstream of the CSA. This limits their function to use in planning cultural policy.

(5) Among the CSA's review groups, there is an opinion that the CSA is biased toward a production side approach. A demand side approach is also necessary, but its development is not sufficient at this stage, and in that sense, the current CSA is “incomplete”. In this respect as well, the approach from the demand side, which was proposed this time, is a problem for UNESCO and must be solved.

Furthermore, when applying these issues to the intangible culture of “food culture”, the specific issues are as follows. First, in addition to the aspect that "food culture" is an intangible culture that is difficult to estimate, there is also the issue of whether it is appropriate to set the "food culture" category as a cultural domain or subdomain. This is not a discussion of methods, but a discussion of cultural divisions and concepts. The UIS's view on this point was as follows.

The UIS Perspective

(1) “Food culture”, is included in intangible cultural heritage if it is included in the category of traditional culture. However, the concept of food, in general, is too broad, and not all of it is cultural. It is only considered a part of culture when there is a particular activity associated with a particular food. This is one of the challenges of the current cultural framework revision work. We must discuss this more fully and clarify the categories in the future.

(2) Regarding food, for example, in the case of an occupational approach, if there is an employment list that includes “chef” in the statistics, it can be clarified. The activity of many chefs is a kind of art and can be regarded as a creative activity, comparable to that of any other artist.

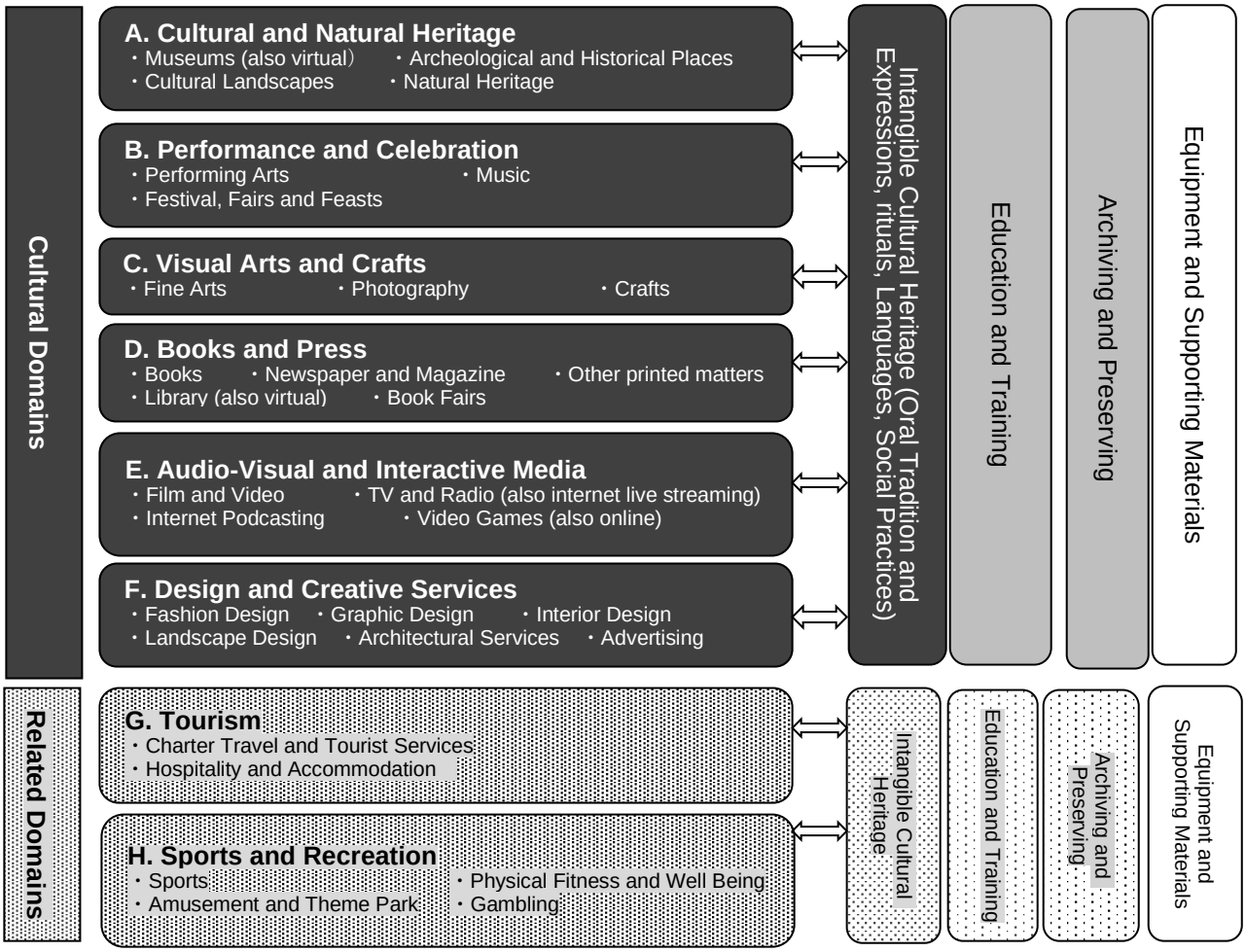
(3) On the other hand, within the food category, many traditional foods are also mass produced. Whether to include traditional food mass production is a question. This also applies to craft. There are cases in which crafts are industrialized and mass-produced. To distinguish between them, for example, a qualifying condition of "handmade" can be added. However, some people and some countries, may want to categorize a wider range of crafts as handicrafts. So is traditional food.

(4) Ethiopia said that it once produced a special beer that was used for traditional events and wanted to include that culture as well. There are also special spices in these traditional food categories. If you have a local brewery and have been brewing for many years, you may say that the beer is a traditional food. But if a big company buys the brewery and then mass-produces local beer, it's questionable whether it's included in traditional food. The issue is where to set the boundaries of these things. This argument leads to a more rigorous definition of the production process, not just the product categories. This is a completely different approach than the 1986 FCS discussion. The new framework may change in these respects.

Column 4　2009FCS

The cultural framework in the “2009 Framework for Cultural Statistics” (2009FCS) is shown in Figure 7. The UIS is currently working on a revision of this framework, but the countries that completed CSA development prior to 2009FCS based their estimates on this framework.[4]

Figure 7 Cultural framework of 2009FCS



Source ; UNESCO Institute for Statistics (2009)

The six domains from A (cultural and natural heritage) to F (design and creative services) in this framework are core domains. Many countries that are compiling the CSA have these 6 domains as their core. Related domains consist of other economic and social activities that are often considered "partly cultural" or "recreational or leisure" rather than "purely cultural."

In addition, the framework sets up three “transverse” domains that are measured across domains in different disciplines. Classified into this domain are intangible cultural heritage, education and training, archiving and preservation.

[4] However, as shown in Figure 5 (p.9), the estimate of Japan's cultural GDP in 2018 was completed prior to this revision work.

Chapter 2: Developing the CSA in Japan

1. Compilation of an international standard CSA

Regarding the compilation of the CSA, which conforms to the UNESCO model and conforms to international standards, through consultation with the UIS, it was confirmed that there is basically no significant deviation in the direction we are currently proceeding with.

In addition, the framework set by UNESCO is presented only as a “reference guideline”, and if it does not largely deviate from that framework, it may be flexibly adapted according to the statistical environment of each country and may be freely recombined to some extent.

Based on this process and the case studies of CAB and two preceding countries, it is considered appropriate to adopt the policy shown in Table 7 for each item that is a problem in the compilation of the CSA in Japan. In addition, the UIS is currently in the process of revising the 2009FCS, and is considering adding "culture education and training" and "culture management" as related domains to the new framework. The two domains are already part of the framework in both Canada and Colombia. Given this trend, it is considered necessary to proceed with the integration of these two domains in Japan as well.

Table 7 Correspondence policy of each domain and subdomain

A. Cultural and Natural Heritage

Sub Domain	Correspondence	Remarks
(1) Museums (also virtual)	Continue last year's method: Estimate based on management and operation costs. (by input method)	There are various types of museums in Japan. Although it is institutionally positioned as a social education institution, it is provisionally placed in the "Cultural and Natural Heritage" domain.
(2) Archeological and Historical Places	Estimate the maintenance and management costs, subsidies, etc. of the ruins and historic sites designated by the country. Collect and organize data for that purpose.	Depending on the example of the preceding country. However, the estimation method from the demand side such as tourism consumption will also be examined.
(3) Cultural Landscapes	Estimate from data such as maintenance and management costs and subsidies of the subject (important cultural landscape, etc.) to which the country has taken legal action. Collect and organize data for that purpose.	In terms of Japanese concept, "famous place", "Mt. Fuji", "cityscape of ancient city", etc. correspond to this. Also examine estimation methods from the demand side.

B. Performing Arts and Celebration

Sub Domain	Correspondence	Remarks
(1) Performing Arts	Continue with last year's method	
(2) Music	Continue with last year's method	
(3) Festivals, Fairs and Feasts	Examine both the specific content and methodological feasibility of “festivals, fairs, and feasts”. Then, it is divided into those placed within the framework of the UNESCO model and those placed in the “intangible culture” of the extended domain (for example, traditional events of the community). The former will be incorporated into the CSA by input method, etc., starting from those that can be estimated. For the latter, method development will continue.	The specific definition of this subdomain varies from country to country. UNESCO suggests that the estimates may be made according to the actual conditions in each country. However, there are some cases in which it is necessary to clearly indicate the concept, classification, and estimation method. It is also necessary to consider the estimation method from the demand side.

C. Visual Arts and Crafts

Sub Domain	Correspondence	Remarks
(1) Fine Arts	Continue with last year's method in the framework of UNESCO model.	Enrichment of statistics and surveys is needed in this domain. However, the handling of "art works" as cultural products is a subject for further study.
(2) Photography	Continue with last year's method	
(3) Crafts	Estimate in accordance with the actual situation and statistical environment of the craft field in Japan.	There are various ways to perceive crafts in different countries. The UIS does not dictate a clear direction. Each country also has its own standards.

D. Books and Press

Sub Domain	Correspondence	Remarks
(1) Books	Continue with last year's method	
(2) Newspaper and Magazine	Continue with last year's method	
(3) Other printed matter	Continue with last year's method	
(4) Library (also virtual)	Correspondence by input method	Institutions and concepts differ from country to country. The input method will be applied based on the Japanese system.
(5) Book Fairs	Not included in sub domain	As a cultural service, this system is not a major element in Japan.

E. Audio-Visual and Interactive Media

Sub Domain	Correspondence	Remarks
(1) Films and Video	Continue with last year's method	
(2) TV and Radio (also internet live streaming)	Continue with last year's method	Pay attention to statistics
(3) Internet Podcasting	Continue with last year's method	Pay attention to statistics
(4) Video Games (also Online)	Continue with last year's method	Pay attention to statistics

F. Design and Creative Services

Sub Domain	Correspondence	Remarks
(1) Fashion Design	Continue with last year's method	
(2) Graphic Design	Continue with last year's method	
(3) Interior Design	Continue with last year's method	
(4) Landscape Design	Integrate with Architectural services	
(5) Architectural Services	Integrate with Landscape Design	
(6) Advertising Services	Continue with last year's method	Of the multiple statistical data, pay attention to the accuracy of the data currently used.
Others	"Package Design" and "Display Design", which are considered as "design industry" in Japan's economic statistics, are added to the subdomain.	It is considered to be the "discretionary" part of the UIS.

G. Cultural Education and Training

Sub Domain	Correspondence	Remarks
(1) Cultural Education and Training	Estimate using the input method according to Japan's education system.	The preceding countries also use the method shown on the left.

H. Cultural Management

Sub Domain	Correspondence	Remarks
(1) Cultural Management	Estimate as much as possible from national and local cultural expenditures (project cost and personnel cost). Estimate from data such as "Fact-finding Survey on Specified Non-Profit Organizations (Cabinet Office)" regarding management and operation of cultural organizations such as NPOs and NGOs.	Various data are also used in preceding countries.

2. Addition of unique Japanese sections to the CSA

As for unique Japanese domains, intangible culture is the primary target. Regarding intangible culture, "Japanese food culture (*Washoku*)" has been registered as a UNESCO intangible cultural heritage site, and "furyu dance" has been selected as a candidate for the next UNESCO intangible cultural heritage. Moreover, it is considered that the selected preservation technology, which is a technology for preserving cultural properties, should be listed as Japanese representative of UNESCO intangible cultural heritage. Thus, there is a growing interest in intangible cultural heritage and the need for cultural policy for intangible cultural heritage.

Although these examples of intangible culture are basically outside the CSA framework, from the point of view of the Japanese basic law of arts and culture, trends in Japan, and our ordinary perception, these are well within our field of culture and are valuable to our society and life. Therefore, it can be said that intangible culture is necessary in the CSA as a domain unique to Japan.

In order to incorporate an example of intangible culture into the framework of the CSA, it is conceivable to add it as a part of lifestyle culture by making use of the results of the 2017 case study, which examined the estimation method. In addition, a realistic program would be to gradually integrate various intangible culture into the CSA.

In this survey, the UIS has obtained suggestions that lifestyle culture may be added to the CSA within the “domestic version” in response to our idea. It was also revealed that sports are incorporated in culture in Canada and food is incorporated in Colombia. Therefore, establishing such a domain would not be problematic. Also, handling this domain as a domestic version will not affect international comparisons.[5]

The problem lies in the estimation method. In this respect, it became clear that both the UIS and the leading countries are considering methods, and find it worrisome.

This year, as one of the methods of this domain, we have used the FD (Final Demand) method that we used to estimate the cultural GDP of tea ceremony etc. We have just made a proposal and asked for an evaluation. This was a new proposal for the UIS and Canada, which have been developing the CSA around the production side approach. Therefore, in some sense, a final evaluation was held and a direction, and possibly an understanding, could be obtained. The UIS has taken the stance of observing it in anticipation of further development.

[5] As the UIS suggests, whether to include this domain in the international comparison version is a topic for further study.

3. Future of the CSA outlook

3.1 The final goal as account

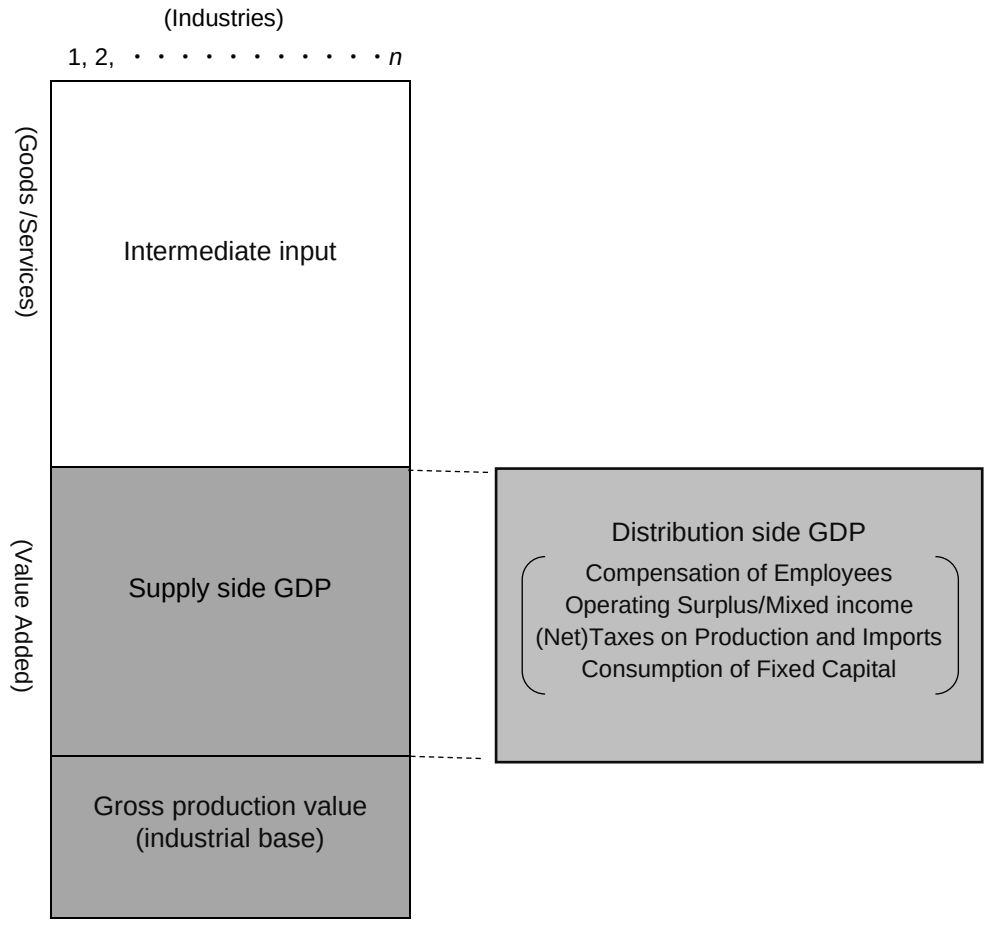
Our current work is at the stage of estimating cultural GDP within the framework of the UNESCO model, the CSA. However, as its name implies, the CSA is a cultural satellite “account”. It does not complete with a cultural GDP estimate. The goal is to realize total accounting system that includes statistics useful for policy making.

The supply/use table for culture is as shown in the figure below. Our current results are at the stage of provisional estimate of production GDP (or distribution GDP) in the production table. By including the figures for exports and imports, and the figures for employment as shown in the expenditure table, an overall account framework can be created. This framework provides an overview of the overall relationship between culture and the economy.

In this way, the CSA will be enhanced by adding such estimates as employment or international trade balance to the supply/use table. Even in countries leading the CSA, the CSA indicators are not limited to cultural GDP, and various indicators are estimated. This enhances the functionality and usefulness of the CSA. (Table 8)

Figure 8 Overall concept of the CSA

(1) Supply Side



(2) Use Side

(Industries)

(Goods /Services)	Intermediate demand	Domestic final demand	Export－Import	Gross production value (products base)
1				
2				
・・・・・・				
m				

(3) Employment Matrix

(Industries)

(Jobs)	Industry 1	Industry 2	Industry 3	・・・	・・・	・・・	*Industry n*
Job a							
Job b							
Job c							
・・・							
Job n							

Table 8 Indicators of the CSA in other countries

Country	Indicators
Australia	GVA, Net taxes attributable to cultural and creative industries, Compensation of Employees, Value of volunteer services, Non-market output of market producers, Employment, Number of cultural and creative entities
Canada	GDP, Output, Employment
Costa Rica	Total Production, Gross-value added; Intermediate Consumption; Wages and Salaries; Taxes on production; Depreciation; Surplus production; Employment; Imports, Exports; Culture Spending and Financing
Finland	Output, Intermediate Consumption, GDP, Consumption expenditure, Exports & Imports, Employed and working hours
France	Gross Value-added, GDP, Total Production, Employment
Mexico	Culture GDP; Employment; Total Production; Gross Production, Gross Value-added; Intermediate Consumption; Household spending on culture; Household culture production; Household culture GDP
Spain	GDP, GVA, Production, Intermediate consumption, Compensation of employees, Other net taxes on production, Gross operating surplus
UK	GDA, Employment, Export of Services
USA	Direct and Indirect Output, Direct and Indirect Employment, Direct and Indirect Compensation, GDP, Supply and consumption of arts and cultural goods and services including imports and exports, Multipliers measuring the effect on the U.S. economy from changes in demand for arts and culture, Full time series spanning 1998-2012

Source："Measuring the Economic Importance of Culture: An Examination of International Methodologies" (Ministry of Cultural Heritage, Canada 2016)

Column 5　The CSA of the USA

The CSA of the USA (1998-2017)[6] is composed of the following seven tables and is highly complete.

Table 1. Production of Commodities by Industry
Table 2. Output and Value Added by Industry
Table 3. Supply and Consumption of Commodities
Table 4. Employment and Compensation of Employees by Industry
Table 5. Total ACPSA-related Employment by Industry
Table 6. Output by ACPSA Commodity
Table 7. Real Output by Commodity (2012-2017)

These seven tables show that the statistical conceptual provisions (or categories) for culture and economy are well defined. The CSA of the USA is based on the NAICS (North American Industrial Classification System). Therefore, the categories of industry and products that form the basis of the categories are clear.

The CSA of the USA is created in collaboration with the NEA (National Endowment for the Arts) and the Department of Economic Analysis, Ministry of Commerce. The NEA conducts various studies on art and culture and has a wealth of statistical data. These data are the basis of the CSA compilation.

(Reference URL: https://www.icpsr.umich.edu/icpsrweb/NADAC/studies/36357)

[6] The official name is "Arts and Cultural Production Satellite Account"（ACPSA）.

3.2 Approach from demand side

Our cultural activities take place in various social and economic areas beyond the framework of cultural GDP. The vision of the numerical evaluation system of culture entails adapting to the social reality, broadening the perspective on culture, society and the economy, and utilizing the numerical evaluation system for EBPM and other purposes.

Capturing cultural activities only from the production side is limiting. In the future, it will be necessary to capture the culture from the demand side (consumption side), as well. Ultimately, economic demand is divided into household consumption expenditure, private non-profit organization consumption expenditure, and government consumption expenditure. Household consumption expenditure accounts for a large proportion of cultural expenditure. The household consumption approach is the most important aspect of the demand side.

A method of capturing cultural consumption from household consumption expenditure and reflecting it onto cultural GDP was tested in a case study of “sake” and “tea ceremony” in a research study in 2017. It showed the necessity of capturing culture from the demand side and further broadening the numerical evaluation system of culture.

In addition to this, the CSA can serve as a basis for a more accurate logic model study of cultural economic policies, if cultural statistics such as cultural participation, cultural expenditure and living time of the people are enriched.

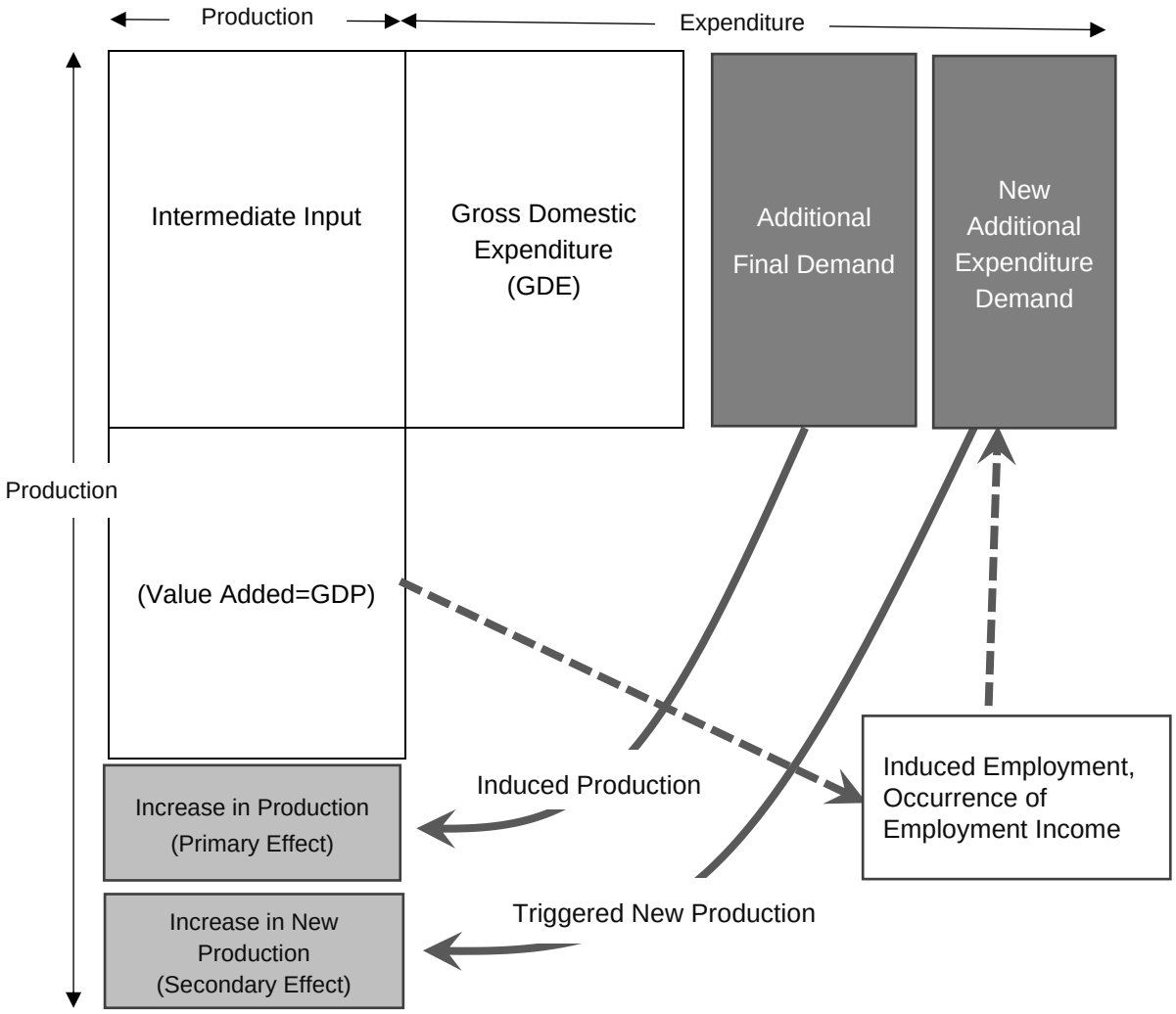
3.3 Linking CSA with the economic ripple effect

The concepts the CSA, as shown in Fig. 9, addresses are defined by the questions: what is a cultural product? where is it produced? and what value is produced there? The economic ripple effect, on the other hand, shows the kinds of production triggered by the demand for new cultural products. And while the CSA is a production-side approach, the economic ripple effect is determined from expenditures (final demand).

To simplify, the CSA attempts to show the composition of cultural activities and phenomena through cultural products, while the economic ripple effect aims to present a big-picture view of the ecosystem, including the consequential secondary and further effects. If the content (composition) of culture is identified by the CSA, and the ecosystem (relationships) of a wide range of culture is subsequently understood, the immediate perspective gained, and the view of cultural policy, are both broadened.

The TSA also consists of two parts, a satellite account part and a ripple effect part. In culture, if the ripple effect part is constructed together with the compilation of the CSA, the basis for numerical evaluation of the economic and social impacts of culture will be further enriched.

Figure 9 Economic ripple effect calculation concept



3.4 Developing the CSA: Japan's role in the global community

Currently, the UIS and CAB employ set international standards for the CSA and recommend that each country compiles a CSA. And some countries have complied the CSA. In this process, a global community on the CSA has been formed with the UIS at the core.

Japan has participated as an observer in the UIS/TAG meetings in Kamakura, Tokyo so far. Furthermore, this year's survey and research provided a foothold from which to join the CSA global community. The development of the CSA is basically carried out within an international framework. In order to make the compilation of the CSA in Japan meaningful, it is necessary to proceed with the compilation of the CSA within this international network.

Participation in the CSA compilation as a member of the global community requires international information dissemination as a prerequisite. Until now, the development of the CSA in Japan has only involved information transmission in Japanese. Therefore, the achievements of Japan were not fully known to the UIS or Canada. In addition, most of the information transmission in Latin America, which is the region where the CSA has advanced

most notably, has only taken place in Spanish, among Spanish-speaking countries. For that reason, it is said that the achievements and awareness of the issues have not been sufficiently shared in the English-speaking world, which is another advanced region of the CSA.

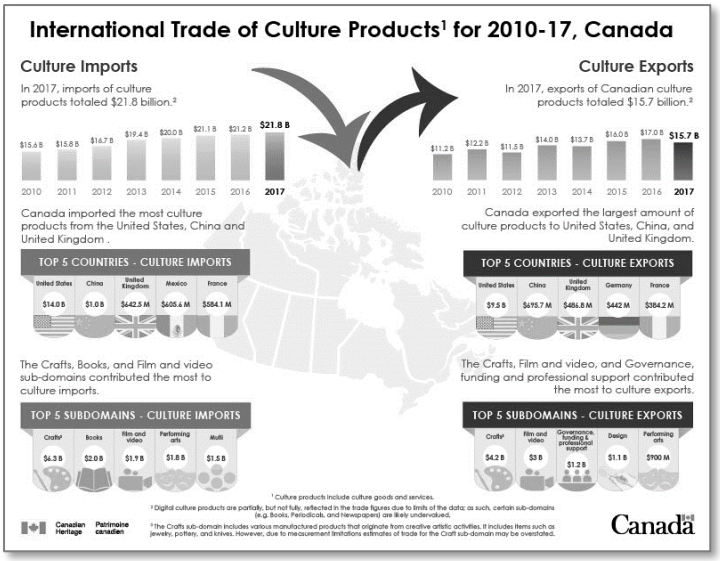
This year's research in Japan was, for the first time, made available in its entirety, in English. It is necessary to continue to maintain and strengthen Japan’s presence as a member of the CSA global community by promoting international information dissemination in this way.

Also, in other Asian countries, efforts to connect culture and economy, by such means as a compilation of the CSA, are an issue for the future. It is possible that Japan, in Asia, will play the role played by the UIS in the world and the role played by CAB in Latin America. Specifically, information dissemination of Japan's CSA efforts, and presentations/introductions of Japan's achievements at international academic conferences may lead to CSA development in Asia. It is also possible to call for cooperation in the CSA efforts in Asian countries and to cooperate.

3.5 Dissemination for CSA sharing

The first purpose of CSA compilation is for use as an EBPM tool. The main users of the CSA are the planners and promoters of cultural policies, but at the same time, quantifying and "visualizing" the impact of culture on the economy, results in society becoming more respectful of culture. This will help strengthen understanding of and consent to the promotion of cultural policy. In Canada, for example, the results of the CSA are fed back to the general public using easy-to-understand infographic formats. This feedback is important because everyone is a cultural stakeholder. All people engage in cultural activities in some form: through participation, consumption, creation and/or production. In Japan as well, it is important to carry out feedback dissemination activities so that this society can share in the significance of the CSA.

Figure 10 Infographic from the Canadian Bureau of Statistics website (import and export of culture)



Source: web site of Statistics Canada
https://www.canada.ca/en/canadian-heritage/corporate/publications/general-publications/culture-satellite-account.html#a2

Column 6　The CSA as a tool for constructing a cultural logic model from a macro perspective

Using the CSA, it is possible to numerically identify a wide range of cultural activities and phenomena, and employ them as tools and evidence to formulate and promote a dynamic cultural policy from a macro perspective or its logic model.

Since Japan's CSA is still in the process of development, let's look at the meaning and significance of the CSA development based on the results of the preceding countries.

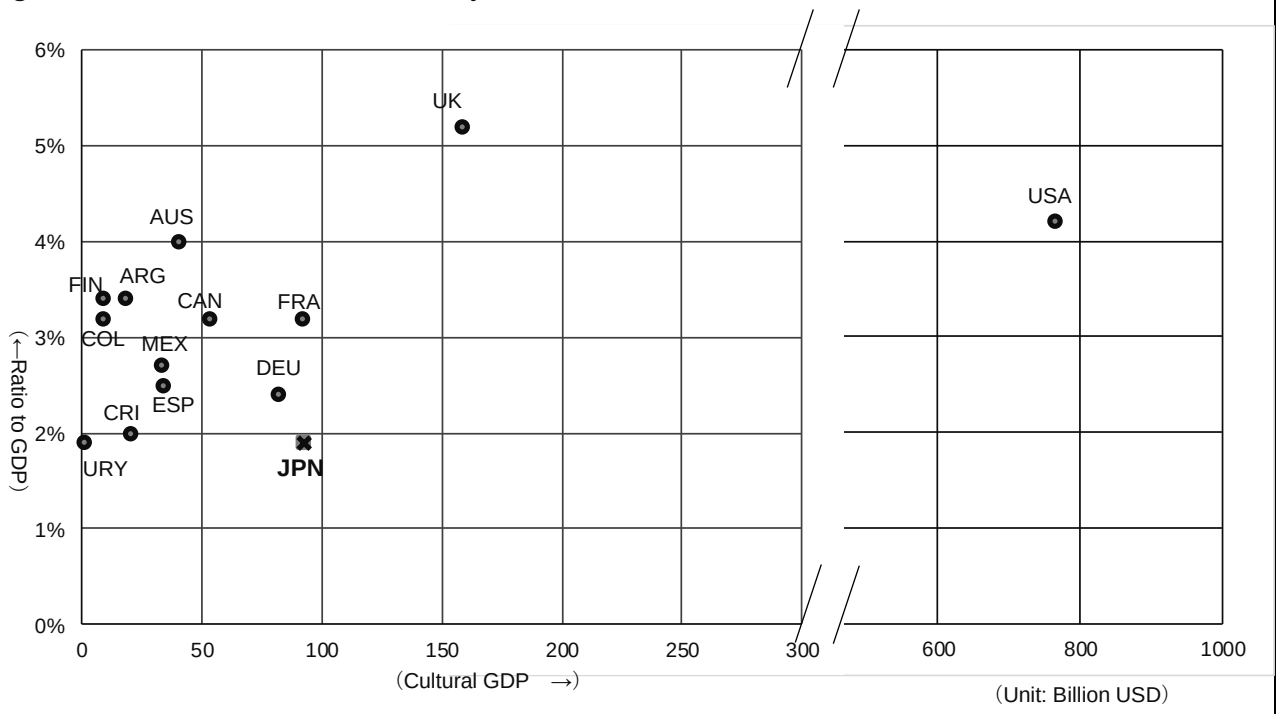
(1) Cultural GDP and core domains

As shown in Column 2 (p. 7-8), the countries with the highest estimated cultural GDP are dominated by the countries with the highest GDP in the world, and Japan is included among them. However, when comparing the ratio of cultural GDP to GDP, Japan is somehow at the bottom.

As shown in Figure 11, the countries with a high ratio of cultural GDP to GDP are the UK, the USA and Australia, and these countries have a ratio of more than 4% culture to GDP. Finland, Argentina, Colombia, Canada and France are in the middle 3% range.

On the other hand, some countries have a high cultural GDP but a low ratio to GDP. Among the developed countries, Japan and Germany are in this category.

Figure 11 Amount and ratio of each country's cultural GDP



Key to abbreviations: ARG (Argentina), AUS (Australia), CAN (Canada), COL (Colombia), CRI (Costa Rica), DEU (Germany), ESP (Spain), FIN (Finland), FRA (France), JPN (Japan), MEX (Mexico), UK (United Kingdom), URY (Uruguay), USA (United States of America),

In making such a comparison, it is important to note that the estimation framework differs from country to country. (See "Table 8 Indicators of the CSA in other countries" p. 28.) the UIS is working to set international standards through adjustments, making international comparisons more accurate and effective.

For example, let's take a closer look at the contents of the US estimates, which has the top cultural GDP estimate. The contents of US cultural GDP are shown in Table 9.

The composition of US cultural GDP is different from that of Japan's. The major areas in the US are "art education", "education services", "art support services (government subsidies, etc.)", "manufacturing industry", "construction", "wholesale and transportation services" and "retail". Some of these areas have been omitted from Japanese estimates.

Table 9 The composition of US cultural GDP （Unit：Million USD）

Core Domains	**152,954**	**20.0%**
Performing Arts	52,942	6.9%
Museums	21,982	2.9%
Design Services	86,109	11.3%
Art Education	3,422	0.4%
Education Services	5,219	0.7%
Related Domains	**583,765**	**76.5%**
Art Support Services	110,652	14.5%
Information Services	363,051	47.5%
Manufacturing Industry	15,039	2.0%
Construction	10,195	1.3%
Wholesale and Transportation services	33,517	4.4%
Retail	51,311	6.7%
Other Industries	**26,851**	**3.5%**
Total	**763,569**	**100.0%**

Source: "The Arts and Cultural Production Satellite Account (ACPSA)" NEA 2018

At this stage, the total of domains such as education, which are not included in Japan's framework, is about 30% of the total estimated value in the US. Excluding this 30% figure from the US estimate and applying the Japanese framework to the US cultural GDP would reduce the US estimate to $ 533,730 million.

As in this case, when actually making international comparisons, each country must be adjusted according to some standard. The main question for each country is how to establish a "core domain" such as the one that the US has created.

Next, it is necessary to compare and verify the CSA estimation results. It is a comparison and verification of the ratio of each domain of cultural GDP and specific numerical values. This is equivalent to comparing and verifying the core domains of each country's estimation framework. For example, Table 10 compares the content of US cultural GDP adjusted under the Japanese framework, with that of Japan.

In the initial comparison, the cultural GDP of the United States was 7 times that of Japan, but in this comparison, it was about 5 times as large. However, some subdomains, which are included in the Japanese estimate but not included in that of the US, require further adjustment.

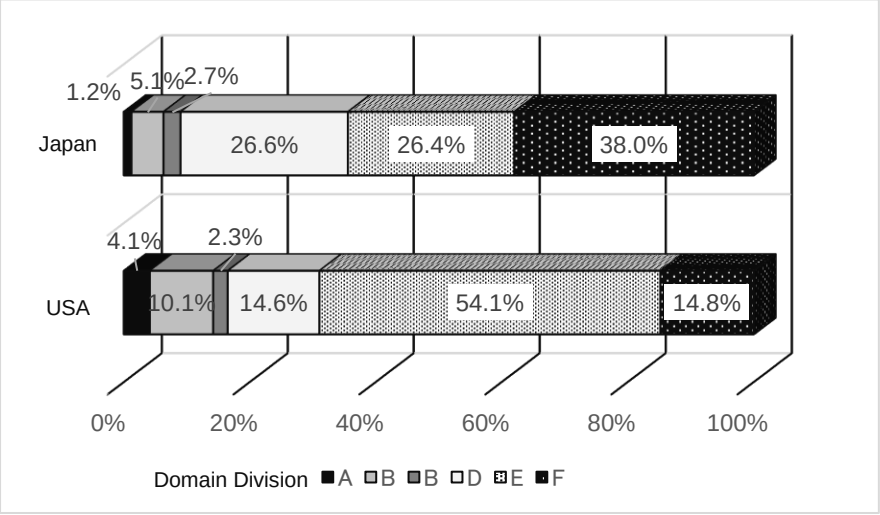
Table 10 Comparison of adjusted US and Japanese cultural GDP

（Unit: 10 million USD）

Domain	USA		Japan	
	Estimate	%	Estimate	%
A. Cultural and Natural Heritage	2,198	4.1%	109	1.2%
B. Performance	5,379	10.1%	468	5.1%
C. Visual Arts and Crafts	1,231	2.3%	250	2.7%
D. Books and Press	7,769	14.6%	2,458	26.6%
E. Audio-Visual and Interactive Media	28,879	54.1%	2,440	26.4%
F. Design and Creative Services	7,917	14.8%	3,509	38.0%
Total	53,373	100.0%	9,234	100.0%

After such adjustments, comparing the composition of cultural GDP in each country reveals the characteristics of that country's “culture”. The figure below compares the US and Japan. In the US, the ratio of "E. Audio-Visual and Interactive Media" is high. In the US, the ratio of "Movies" to "Broadcasts" in this domain is higher than in Japan.

Figure 12 Comparison of adjusted US and Japanese cultural GDP domain structure



In this way, comparison and verification of core domains will lead to the creation of logic models and concrete measures for planning, promoting, and evaluating ways and policies that are effective and necessary to promoting culture (industry) in each country.

In France, for example, the CSA is used as a concrete numerical value to show the degree of influence of the government's spending on the cultural sector on the cultural economy and to show the need for policies. The French government reports, for example, "This is equivalent to 16.1% of the culture value-added and 7.2% of the total production, which can be considered a measure of the government's impact on the sector."(Department of Canadian Heritage (2016))

(2) International trade balance of culture

In Japan and many other countries, the international trade balance has not yet been estimated. Therefore, international comparisons can only be made between/among a limited number of countries. Countries which have compiled a CSA import/export table are the US, the UK, Finland and Canada.

US cultural imports are about 43 billion dollars and exports are 64 billion dollars, which is an "excess of export over import" (2015). Movies and television are the top cultural industries that support "excess of export over import" in the US ($ 17.9 billion). In the UK, cultural exports amounted to US $ 294.7 million (2014), which accounts for 8.2% of the total export value. Finland estimates products and services separately. In the case of cultural products, imports are 987 million euros (2005) and exports are 624 million euros, which is "excess of import over export". In Canada, cultural imports were CAD218 million, exports were CAD157 million, and Canada is " excess of import over export". (2017)

In Japan, which aims to be a "cultural nation", it is important to understand the current state of the international trade balance of culture, and from this perspective it is necessary to proceed with the CSA compilation.

Figure 13 Top US exported cultural products (2015)

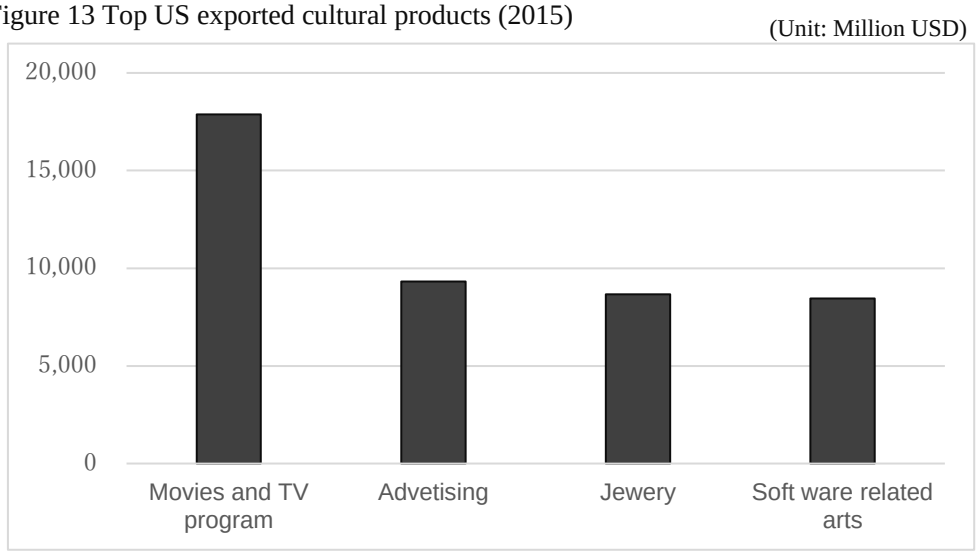
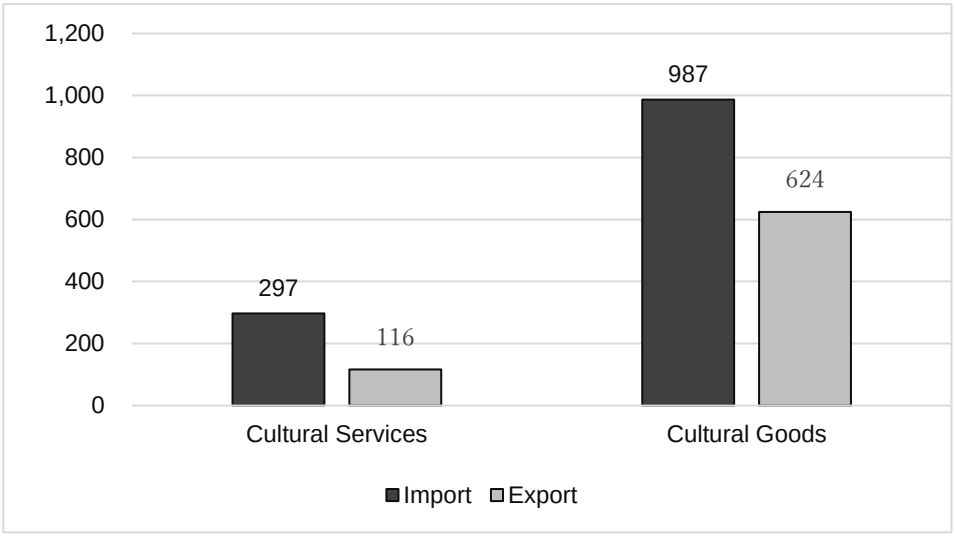


Figure 14　Finnish international trade balance of culture (2005)

(Unit: Million Euro)



Source: "Measuring the Economic Importance of Culture: An Examination of International Methodologies" (Canadian Ministry of Cultural Heritage 2016)

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