

2025 Cultural Administration Research Survey Report

A Quantitative Evaluation: The Economic and Social Effects of Culture

Summary



Contents

1	The evolution and current status of Culture GDP estimation in Japan	3
2	Japan's Cultural GDP Estimation Method	4
3	The reference year covered by the estimation conducted in FY2025	5
4	Structural changes and scope of estimation resulting from the revision to FCS2025	6
5	Estimates of Japan's Cultural GDP for 2020 (in accordance with FCS2025)	7
6	Estimates of Japan's Cultural GDP for 2021 (in accordance with FCS2025)	9

1

The evolution and current status of Cultural GDP estimation in Japan

Japan's Cultural GDP estimation follows UNESCO's *Framework for Cultural Statistics (FCS)*—the international standard for defining, measuring, and comparing culture—and seeks to make visible (in numerical terms) the economic impact of culture by estimating the value added generated by culture-related industries.

Trial and Preparation Phase

FY2017

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

FY2018

- Start of estimation based on UNESCO-guidelines

FY2019

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

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

Compilation Phase

FY2020

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

FY2021

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

Maintenance and Utilization Phase

FY2022

- 2019 estimate updates and added domains (cultural domains unique to Japan)

FY2023

- Cultural GDP estimation for 2020 (FY2020), using the 2020 extended I–O Tables derived from the 2015 benchmark tables. Trial estimation for related cultural domains

FY2024

- Cultural GDP estimation for 2020 (using the 2020 I–O Tables). Calculation of GDP for selected foreign countries. Refinement of the export–import domain.

FCS
2009FCS
2025

FY2025

- Cultural GDP estimation for 2020 (in accordance with FCS 2025, using the 2020 I–O Tables)
- Cultural GDP estimation for 2021 (in accordance with FCS 2025, based on the 2021 extended I–O Tables derived from the 2020 tables)

Note: Japan's cultural GDP estimation uses the most recently published I–O Tables, and therefore a time lag of several years inevitably arises depending on the publication schedule.

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

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

3 Estimation of value added

- Estimating value added using I-O Tables
- Domestic production value × Value-added rate = Value added (cultural GDP)
[based on industrial statistics] [from I-O Tables]

3

The reference year covered by the estimation conducted in FY2025

- Each year's cultural GDP estimation is based on the most recently published FCS framework and the latest available input–output tables (revised every five years) or extended I–O Tables.
- Following the update from FCS 2009 to FCS 2025, the scope of cultural domains has changed. (see the following pages for details).
- In response, in FY2025, Japan re-estimated the 2020 cultural GDP—corresponding to the latest benchmark year of the I–O Tables—based on FCS 2025 (the FY2024 estimation was based on FCS 2009), and additionally produced a new estimation for 2021.

Estimation year	Before FY2023	FY2024	FY2025	
targeted fiscal year	2015~2020	2020	2020	2021
Applied FCS	FCS2009	FCS2009	FCS2025 (published in 2025)	
I-O Tables	2015 edition (published in 2019)	2020 edition (published in 2024)	2020 edition	
Expanded I-O Tables	2016—2020 edition	—	—	2021 edition *

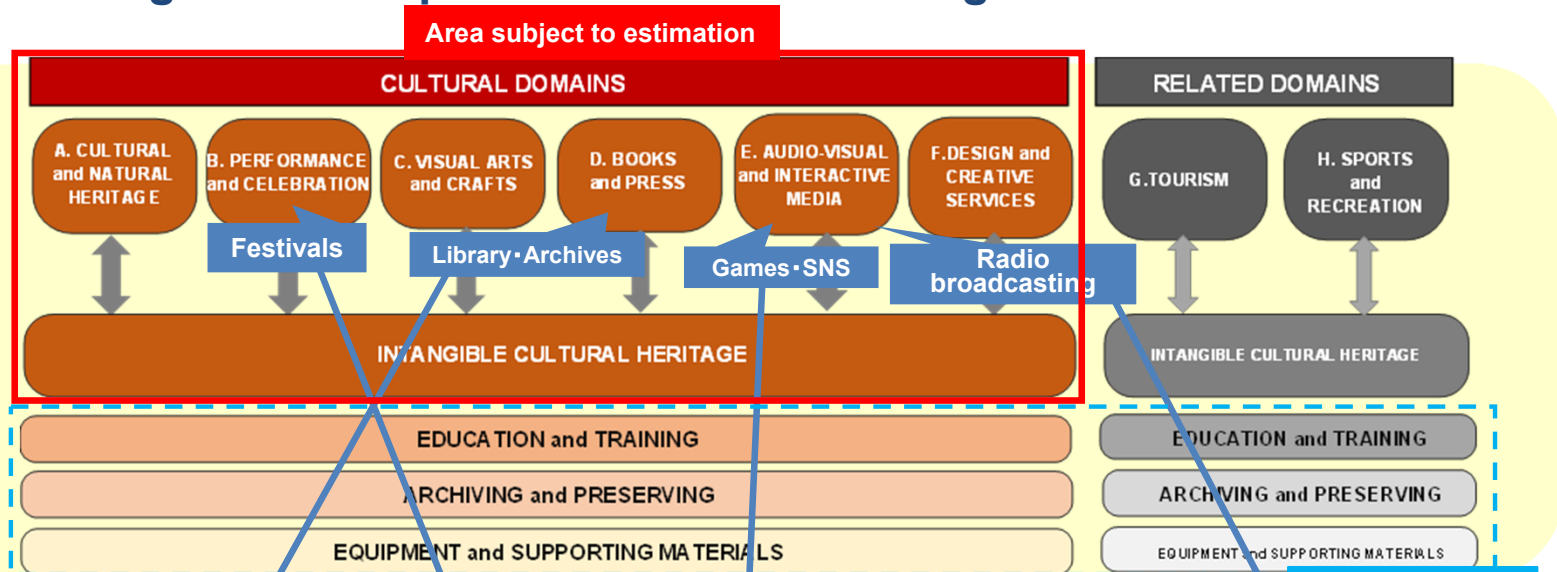
Note that time-series comparison across these periods is difficult, because the I–O Tables used before FY2023 differ from those used from FY2024 onward, and the FCS framework applied in FY2024 differs from that applied in FY2025.

Note: Because the extended tables is classified only up to the basic-category level, the domestic production value of cultural goods was estimated by applying the production-value shares of cultural products extracted from the detailed 2020 I–O Tables to the 2021 basic-category production values.

4 Structural changes and scope of estimation resulting from the revision of FCS2025

FCS2009

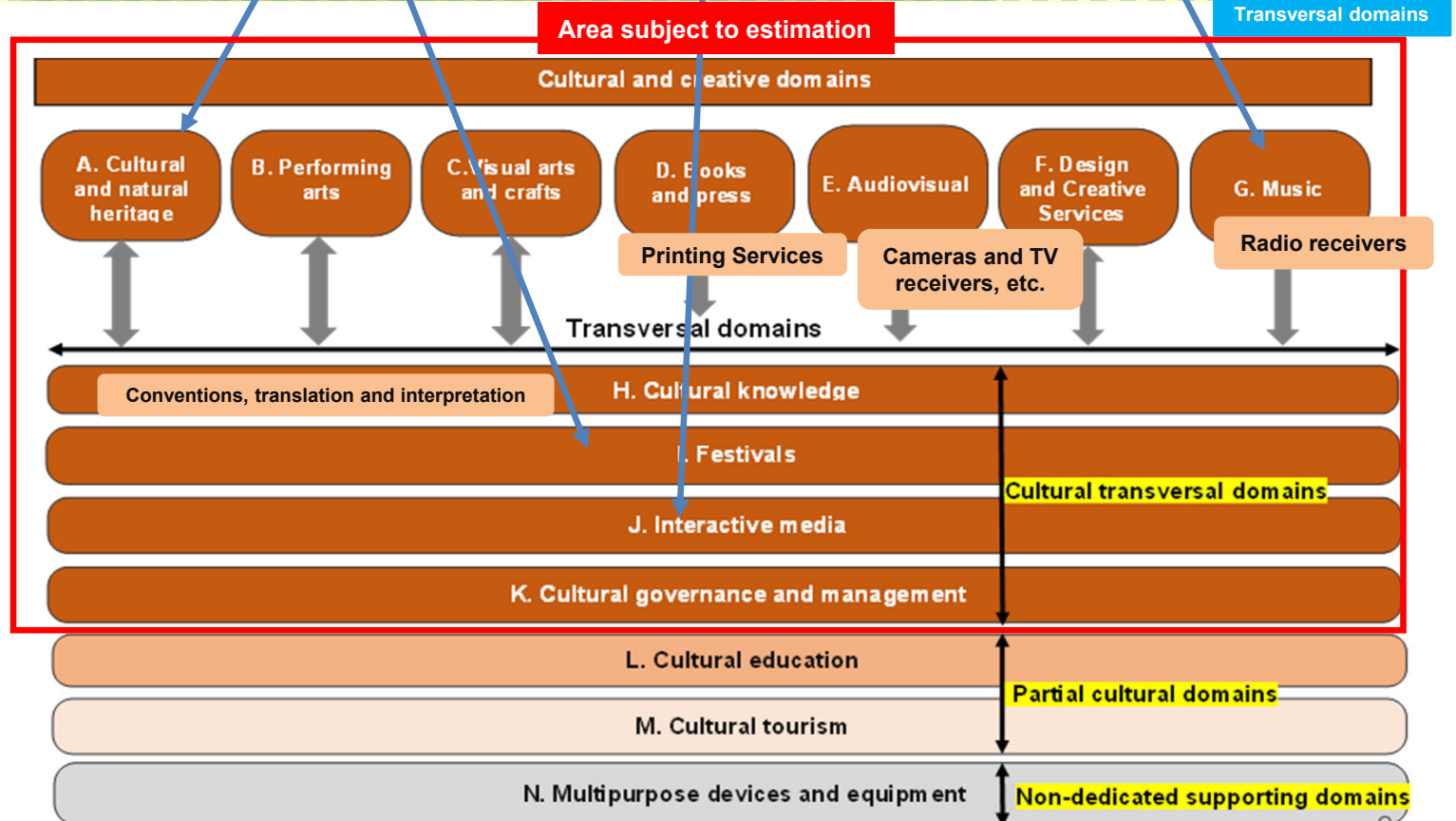
Composed of the “cultural domain”—the core area related to culture; the “cross-cutting domain”—an area playing a crucial role in the production and transmission of culture; and “related domains”—areas considered partially cultural.



Revision ↓

FCS2025

Composed of the “cultural and creative domain” and “cultural transversal domain”—which are central areas related to culture—as well as the “partial cultural domains” (where only a portion falls within the cultural domain) and the “non-dedicated support domains” (comprising equipment, supplementary materials, and the like for cultural activities).



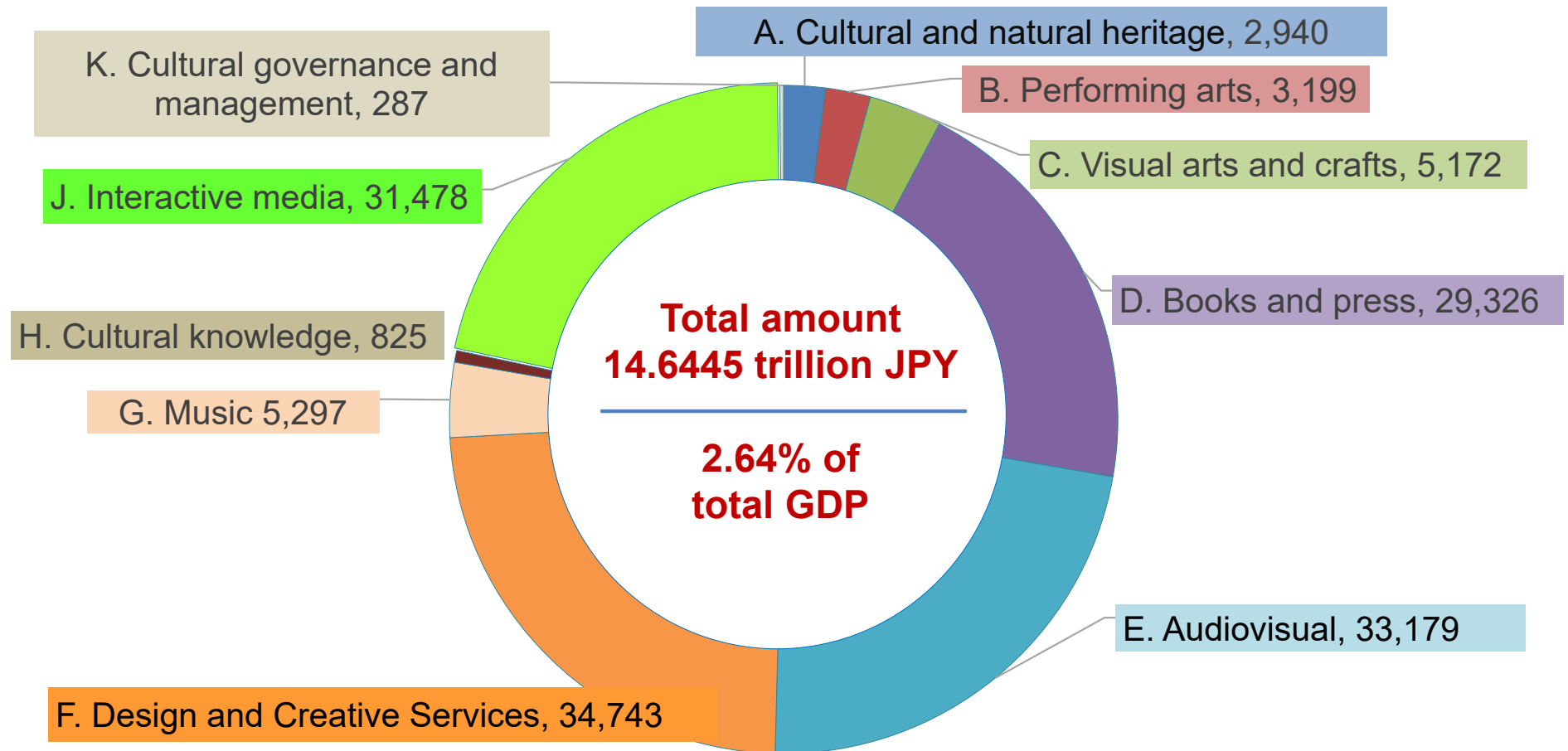
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Estimates of Japan's Cultural GDP for 2020

(in accordance with FCS2025)

5-1 Scale and Composition

(Unit: 100 million JPY)

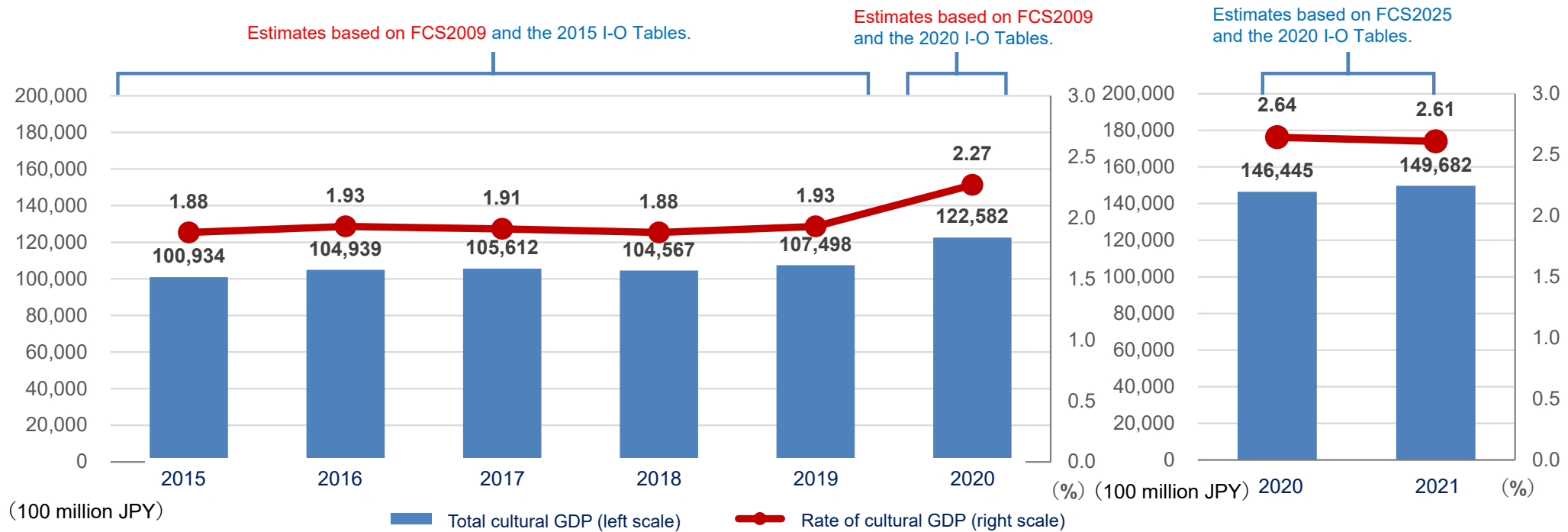


*Estimated using the 2020 I-O Tables (Ministry of Internal Affairs and Communications, et al.).

**"Domain I: Festivals" is excluded due to the lack of appropriate domestic data.

*Figures are rounded; therefore, the sum of figures or the results of calculations may not match the listed values.

5-2 Trends in Cultural GDP (2015–2021): Nominal Values



	2015	2016	2017	2018	2019	2020 (2015 I-O Tables)	2020 (2020 I-O Tables)	2020* (FCS2009)	2021* (FCS2025)
National GDP (Gross Domestic Product) (unit:100 million JPY)	5,380,323	5,443,646	5,530,730	5,566,301	5,579,108	5,398,082	5,398,082	5,540,744	5,735,688
Cultural GDP (unit:100 million JPY)	100,934	104,939	105,612	104,567	107,498	103,485	122,582	146,445	149,682
Ratio of cultural GDP to total national GDP (unit:%)	1.88	1.93	1.91	1.88	1.93	1.92	2.27	2.64	2.61

*The estimates for 2020 (based on the 2020 Input-Output Tables) were calculated using the 2020 I-O Tables. Estimates for 2015 were based on the 2015 I-O Tables, while estimates for 2016–2020 (based on the 2015 I-O Tables) were based on the extended I-O Tables aligned with the 2015 standard. Because the underlying frameworks differ, making simple comparisons with previous years difficult, the 2020 figures are presented using both the 2015 standard and the 2020 standard for reference. Note that these estimates comply with FCS2009.

*The estimates for 2020 (based on the 2015 Input-Output Tables) include figures for categories newly added to the scope of estimation.

*The figures for 2020 (based on the 2020 I-O Tables) include 381.3 billion yen in value added attributed to "originals of entertainment works," a category newly added in this revision. The figures show a decrease compared to 2019, partly due to the impact of the spread of COVID-19.

Estimates for 2020 and 2021* were calculated using the 2020 I-O Tables in accordance with FCS2025. National GDP figures utilize the 2020-base revised data for the 2020 and 2021 calendar years (released in fiscal year 2024).

*Figures are rounded; therefore, the sum of components or the results of calculations may not always match the listed figures.

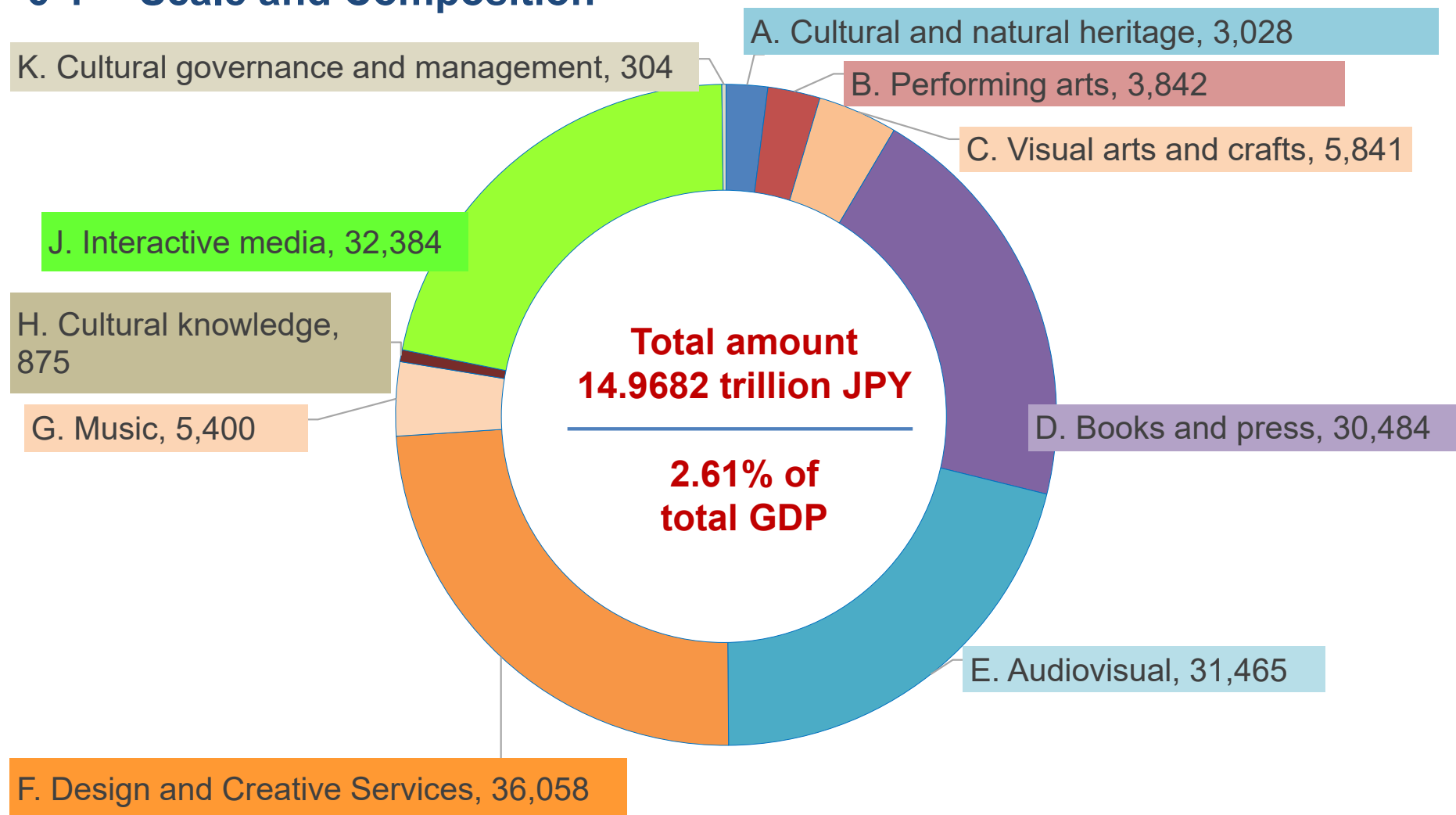
6

Estimates of Japan's Cultural GDP for 2021

(in accordance with FCS2025)

(Unit: 100 million JPY)

6-1 Scale and Composition



*Estimated using the 2021 extended I-O Tables (Ministry of Internal Affairs and Communications, et al.).

**"Domain I: Festivals" is excluded due to the lack of appropriate domestic data.

*Figures are rounded; therefore, the sum of figures or the results of calculations may not match the listed values.

6-2 Nominal Cultural GDP by Domain (2020 and 2021) (in accordance with FCS2025)

Domain	2020	2021	Change	Change Rate
	Gross Value Added (a) (billion JPY)	Gross Value Added (b) (billion JPY)	c=(b-a) (billion JPY)	c/a×100 (%)
A: Cultural and natural heritage	2,940	3,028	89	3.0%
B: Performing arts	3,199	3,842	643	20.1%
C: Visual arts and crafts	5,172	5,841	669	12.9%
D: Books and press	29,326	30,484	1,158	3.9%
E: Audiovisual	33,179	31,465	-1,714	-5.2%
F: Design and Creative Services	34,743	36,058	1,315	3.8%
G: Music	5,297	5,400	102	1.9%
H: Cultural knowledge	825	875	50	6.1%
I: Festivals	(Not Accounted for due to lack of domestic data)			
J: Interactive media	31,478	32,384	906	2.9%
K: Cultural governance and management	287	304	17	6.1%
Total	146,445	149,682	3,237	2.2%