

Japanese Art Industry Market Research Report 2018

Art Tokyo Association

Survey Co-organizer: Platform for Arts and Creativity

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Chapter 1: Report Summary

1-1: Background and Aims

The link between art and business and industry has recently attracted attention from governments as well as the private sector. Information for understanding the actual state of the art industry in Japan is still frequently undeveloped and even the scale of the market has yet to be disclosed in a reliable form. Accordingly, Art Tokyo Association, which organizes Art Fair Tokyo, Japan's largest art fair, has partnered with Platform for Arts and Creativity, which offers consulting services related to industrial policy and arts and culture, to conduct and present findings from the Japanese Art Industry Market Research Survey annually since 2016.

As in previous years, the results of the survey are laid out in this report according to the market scale of the domestic art industry (Chapter 2) and state of imports and exports of works of art (Chapter 3), alongside new sections on museum visits and the needs for museum visitors (Chapter 4) and what art means for business people who have a lot of international experience (Chapter 5).

1-2: Survey Methodology

The survey is fundamentally based on a questionnaire conducted with respondents supplied by an online questionnaire service. The survey was conducted in two stages: the first survey and second survey. **The first survey collected 20,475 samples, which was on a similar scale to the previous surveys. The second survey analyzed a group of 299 samples from the first set of respondents who corresponded to the following categorizations: “internationally well-experienced,” an “employed resident of Tokyo, Kanagawa, Saitama, or Chiba aged between their twenties and fifties,” and “visited a museum or art museum at least twice in the past year.”**

As in previous surveys, in order to estimate the scale of the market across the whole of Japan, the first survey was distributed over the country in terms of gender, age (6 groupings), employment status (employed, unemployed), and income (12 classifications of personal income for the employed or household income for the unemployed¹) based on 2017 data on the labor force from the Statistics Bureau of the Ministry of Internal Affairs and Communications. In addition, since people with high incomes can be considered more likely to buy works of art, more samples were collected from those with incomes of 7 million JPY or above than the actual distribution of income, which was then weighted during the analysis according to the distribution across Japan.

Criteria were set for data from the original collected sample that demonstrated a contradiction or unrealistic result² in regard to the amount of a purchase, and then removed from the analysis.

Each of the 2 surveys had 10 questions. Summaries of the questions are shown in Chart 1 below.

¹ Since the number of unemployed persons cannot be distributed by personal income, the survey aimed to distribute them by household income. However, due to the absence of data on gender and age for the head of household, an estimate was made based on personal income and employment rate.

² For example, cases where the total purchase amount per type of artwork and total purchase amount per sales channel did not match, or respondents whose purchase amounts were high for art-related items and museum shop purchases, or respondents whose purchase amounts at auction were low.

Chart 1: Survey Summary

Survey Method	Questionnaire survey targeting respondents registered to an online questionnaire service
Survey Period	September 28 – October 4th, 2018
Survey Target	<p>The survey was implemented in two stages with the following respective targets.</p> <p>First Survey:</p> <p>Gender, age, employment status (employment, unemployed) and income (personal income for the employed, household income for the unemployed) distributed across the whole of Japan, based on government data</p> <p>Second Survey:</p> <p>Respondents meeting the following conditions:</p> <ul style="list-style-type: none"> - International experience above a certain level³ - Visits art museums and museums (2 times a year or more) - Aged between 20 and 59 - Employed or working (company employee, self-employed, professional, government worker) - Resident in target area (Tokyo Metropolis, Chiba Prefecture, Saitama Prefecture, Kanagawa Prefecture)
Valid Samples	<p>First Survey: 20,475 samples</p> <p>Second Survey: 299 samples</p>
Survey Question Topics	<p>First Survey:</p> <ul style="list-style-type: none"> - Experience of buying works of art or art-related products - Amount (purchase cost) of purchased works of art or art-related products per type of art and sales channel - Frequency of visits to art museums and museums - Expectations of art museums and museums in Japan* - Visit days and times for art museums and museums in Japan* - Art museums and museums in Japan visited, and wish for nighttime opening hours* - Experience of living abroad* - Personal and household income <p>(10 questions in total)</p> <p>*Newly added question topics</p> <p>Second Survey:</p> <ul style="list-style-type: none"> - Frequency of visit per channel - Reasons for not visiting a gallery - Recommended places to take non-Japanese friends or acquaintances - Reasons for not introducing art museums or museums to non-Japanese friends or acquaintances - Future intention to buy works of art - Stimulus to buy (or want more to buy) work of art - Values associated with art - Art genres where Japan leads the world <p>(10 questions in total)</p>

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

³ Here designating someone who has either lived abroad (for 1 month or more), stayed overseas in the past year (a total stay of 2 weeks or more on vacation or for work), or who has experience working for a foreign company (where the official internal language is English).

1-3: Basic Attributes of Respondents

The basic attributes of respondents to the first survey can be seen in the following table. They are distributed evenly across Japan in order to weight the figures for gender, age, and personal income (for employed persons). The classification of regions and household annual income does not deviate significantly from the distribution across Japan.

Chart 2: Basic Attributes of Respondents to First Survey (Sample as Proportion of Overall)

Gender					
Category	Simple Aggregate	After Weighting	Distribution in Japan		
Male	9,943	49%	8,705	48%	48%
Female	10,532	51%	9,262	52%	52%

Age					
Category	Simple Aggregate	After Weighting	Distribution in Japan		
15–24 years old	1,060	5%	1,978	11%	11%
25–34 years old	2,847	14%	2,206	12%	13%
35–44 years old	3,511	17%	2,836	16%	16%
45–54 years old	3,733	18%	2,843	16%	15%
55–64 years old	4,323	21%	2,504	14%	15%
65 years old and older	5,001	24%	5,601	31%	30%

Regional Classification					
Category	Simple Aggregate	After Weighting	Distribution in Japan		
Hokkaido	936	5%	956	5%	4%
Tohoku	1,013	5%	989	6%	7%
Kanto	9,044	44%	7,268	40%	34%
Hokuriku	619	3%	612	3%	4%
Chubu	2,217	11%	1,954	11%	13%
Kinki	3,872	19%	3,580	20%	18%
Chugoku	931	5%	853	5%	6%
Shikoku	458	2%	463	3%	3%
Kyushu	1,385	7%	1,291	7%	11%

Personal Income (Employed)					
Category	Simple Aggregate	After Weighting	Distribution in Japan		
None	254	2.1%	275	2.6%	17.8%
Under 1 million JPY	1,489	12.2%	1,591	14.9%	
1 million – under 2 million JPY	1,807	14.8%	1,941	18.1%	19.0%
2 million – under 3 million JPY	1,664	13.6%	1,804	16.8%	16.6%
3 million – under 4 million JPY	1,496	12.3%	1,565	14.6%	14.6%
4 million – under 5 million JPY	1,118	9.2%	1,145	10.7%	10.4%
5 million – under 6 million JPY	766	6.3%	711	6.6%	
6 million – under 6 million JPY	599	4.9%	564	5.3%	11.5%
7 million – under 8 million JPY	663	5.4%	343	3.2%	
8 million – under 9 million JPY	401	3.3%	211	2.0%	6.9%
9 million – under 10 million JPY	349	2.9%	188	1.8%	
10 million – under 15 million JPY	1,033	8.5%	263	2.5%	2.4%
15 million JPY and over	561	4.6%	112	1.0%	0.9%

Household Income					
Category	Simple Aggregate	After Weighting	Distribution in Japan		
Under 3 million JPY	5,143	27%	8,473	48%	34%
3 million – under 5 million JPY	4,464	23%	3,393	19%	23%
5 million – under 7 million JPY	3,019	16%	2,313	13%	16%
7 million – under 10 million JPY	3,877	20%	2,326	13%	15%
10 million – under 15 million JPY	2,606	14%	1,063	6%	9%
15 million JPY and over	0	0%	0	0%	3%

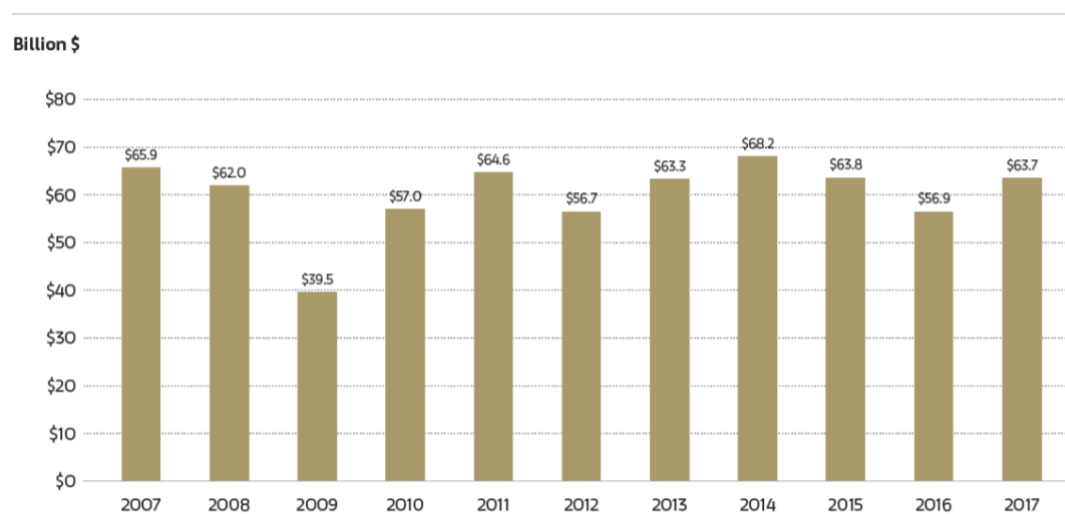
Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chapter 2: Market Scale of the Art Industry in Japan

2-1: Global Art Market Scale and Economic Conditions

Chart 3 shows changes in the global art market. With the exception of 2009, when there was a financial crisis, the market has remained at a level of approximately \$60 billion. Though the market declined for two years in a row in 2015 and 2016, it recovered in 2017 to approximately \$63.7 billion (approximately 7.16 trillion JPY⁴).

Chart 3: Scale of Global Art Market



Source: Art Basel & UBS, "The Art Market 2018"

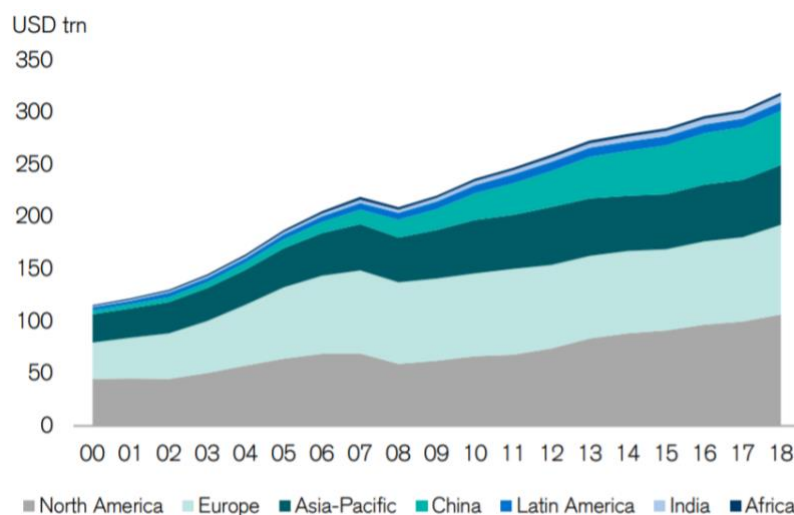
⁴ Based on an official Ministry of Finance exchange rate of 1 USD to 112.43 JPY from December 30, 2018 until January 5, 2019.

It is conceivable that the global art market was significantly influenced by the rise in stock prices in the United States (as shown in Chart 4) during this period, along with the increase in global wealth (Chart 5).

Chart 4: Changes in the Dow Jones Industrial Average (Past 5 Years)



Chart 5: Changes in Total Global Assets⁵



⁵ Original title: "Total global wealth 2000–18, smoothed exchange rates"

2-2: Methodology for Estimating the Scale of the Japanese Art Market

Following the same approach as the previous surveys, the art industry and market were defined through the total values of the market for works of art (1), the market for art-related products (2), and the market for art-related services (3), and then the changes across those categories assessed.

Chart 6: Summary of Methodology for Estimating Market Scale

Market Type	Estimate Target	Estimate Method
1. Market for works of art	Purchases of the following kinds of works of art via the following kinds of sales channels by residents of Japan: • Galleries, department stores, art fairs, art auctions, museum shops, websites • Works of art (<i>nihonga</i> , <i>yōga</i> , sculptures, prints, contemporary art, photography, video/film, ceramics, crafts, calligraphy, hanging scrolls, folding screens)	This questionnaire survey ⁶
2. Market for art-related products	Purchases of the following kinds of art-related products by residents of Japan: • Posters and postcards of famous paintings • Exhibition catalogues and art books • Merchandise based on famous paintings, sculptures, etc.	
3. Market for art-related services	• Admission fees for visits to art museums and museums by residents in Japan • Consumption related to visits to major art projects	
		Individual reports

The market for art-related services comprises two sections: admission fees for visits to art museums and museums by residents in Japan (hereafter “art museum and museum admission fees”) and consumption related to visits to major art projects (hereafter “art projects consumption”).

Art museum and museum admission fees were surveyed in regard to the number of visits (only for events with admission fees) annually for art museums and museums, from which an average admission fee was estimated.⁷

Art projects consumption was estimated by annualizing the direct consumption expenditure for major art festivals (only those with public reports) held since 2015, based on their frequency (biennale: every 2 years; triennale: every 3 years), and then calculating a total.⁸

⁶ Sales figures for art auctions in Japan used the total highest bids for auction houses in Japan published annually in Art Collectors magazine (Seikatsu no Tomo Co.).

⁷ Estimated from the average admission ticket price per person (1,241 JPY) from visitor numbers and ticket prices (general advance) for major exhibitions at national art museums (National Museum of Modern Art, Tokyo; National Museum of Modern Art, Kyoto; National Museum of Western Art; National Museum of Art, Osaka; National Art Center, Tokyo) and national museums (Tokyo National Museum; Kyoto National Museum; Nara National Museum; Kyushu National Museum) in 2015. The average admission fee per person is calculated at the same amount as previous surveys.

⁸ Yokohama Triennale, Aichi Triennale, Sapporo International Art Festival, Parasophia: Kyoto International Festival of Contemporary Culture, Echigo-Tsumari Art Triennale, Setouchi Triennale, Ichihara Art x Mix, Beppu Contemporary Art Festival Mixed Bathing World, Saitama Triennale, KENPOKU ART, Okayama Art Summit, Japan Alps Art Festival, Oku-Noto Triennale, Reborn-Art Festival, etc.

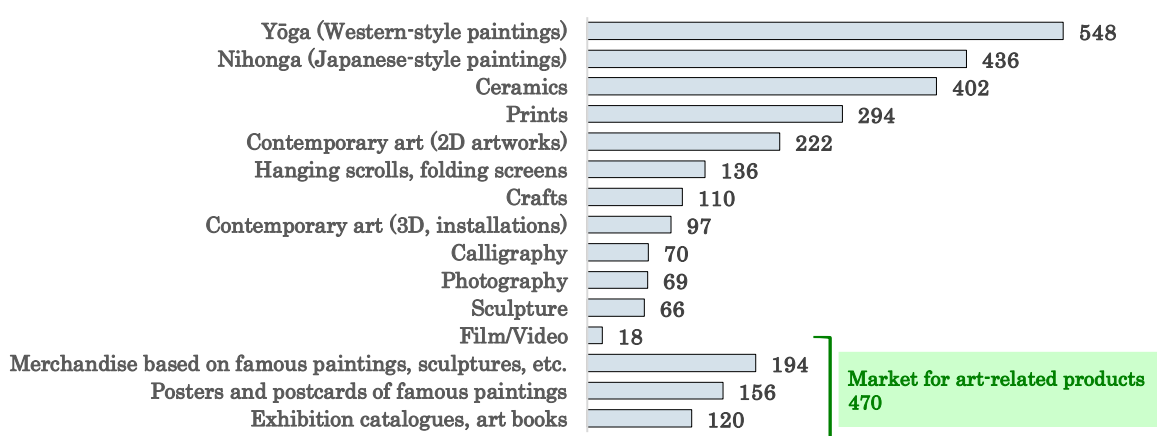
2-3: Japanese Art Market Scale Estimate Results

Chart 7 shows the results from the estimate of the Japanese art market by type of art. Continuing the findings of previous surveys, *yōga* has the largest market with 54.8 billion JPY, followed by *nihonga*, ceramics, and prints. The market for art-related products is estimated at 47 billion JPY.

The market estimates by sales channel are shown in Chart 8. **Purchases of works of art are estimated to total 246 billion JPY**, of which 212.5 billion are purchases from Japanese businesses. **Reflecting the results of earlier surveys, galleries and department stores in Japan had the highest sales, accounting for 73.5 billion JPY and 64.4 billion JPY respectively.**

Chart 7: Market Scale for Works of Art and Art-related Products by Type⁹

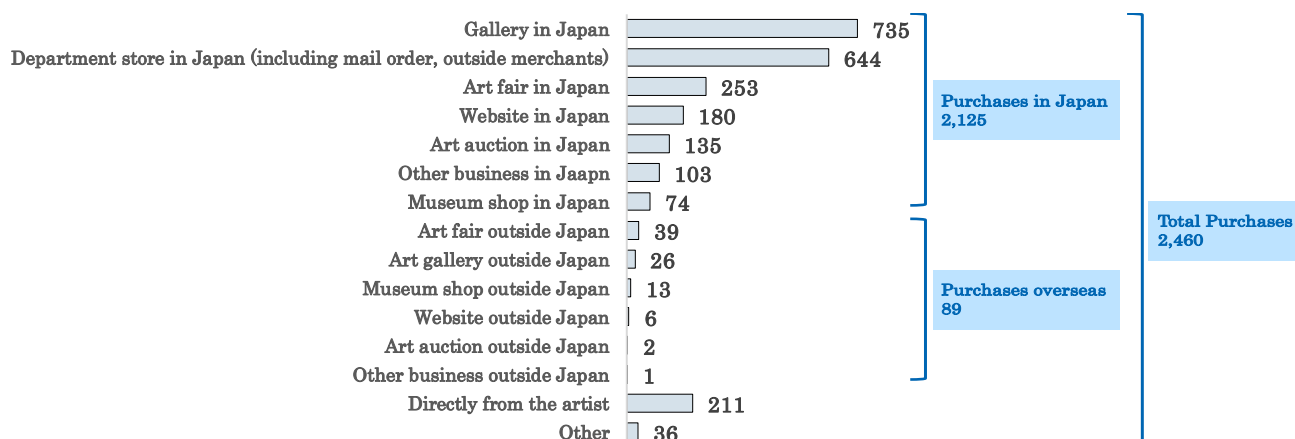
(Unit=100M JPY) (n=20,475)



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 8: Market Scale for Works of Art by Sales Channel

(Unit=100M JPY)(n=20,475)



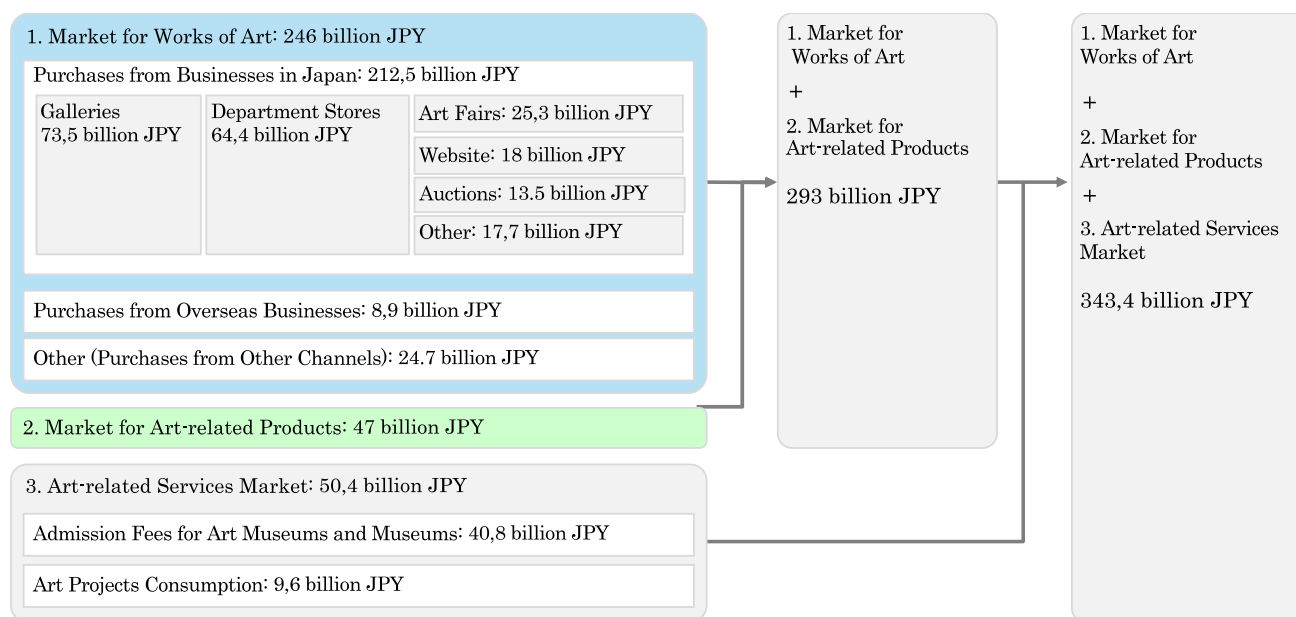
Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

⁹ The figures for purchases by type include duplicates, meaning the total amount for purchases of works of art differs from the total amount of purchases of works of art by sales channel.

Admission fees for art museums and museums have an estimated total of 40.8 billion JPY, while art projects consumption is 9.6 billion JPY. Combined together as art-related services, they total 50.4 billion JPY.

Combining the totals for the market for works of art (246 billion JPY¹⁰), art-related products (47 billion JPY), and art-related services (50.4 billion JPY), the overall scale of the art market is estimated at 343.4 billion JPY.

Chart 9: Overview of Art-related Market Scale¹¹



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁰ The figures per type of art and per sales channel differ. This would seem to result from the existence of multiple answers for purchases per type of art (for example, a work of art that may fall into more than one category). As such, the figure for purchases per sales channel was used to estimate the market for works of art.

¹¹ Since each value is rounded off to the nearest billion yen (including fractions), there may be cases where the total value does not match the total of the values in the breakdown.

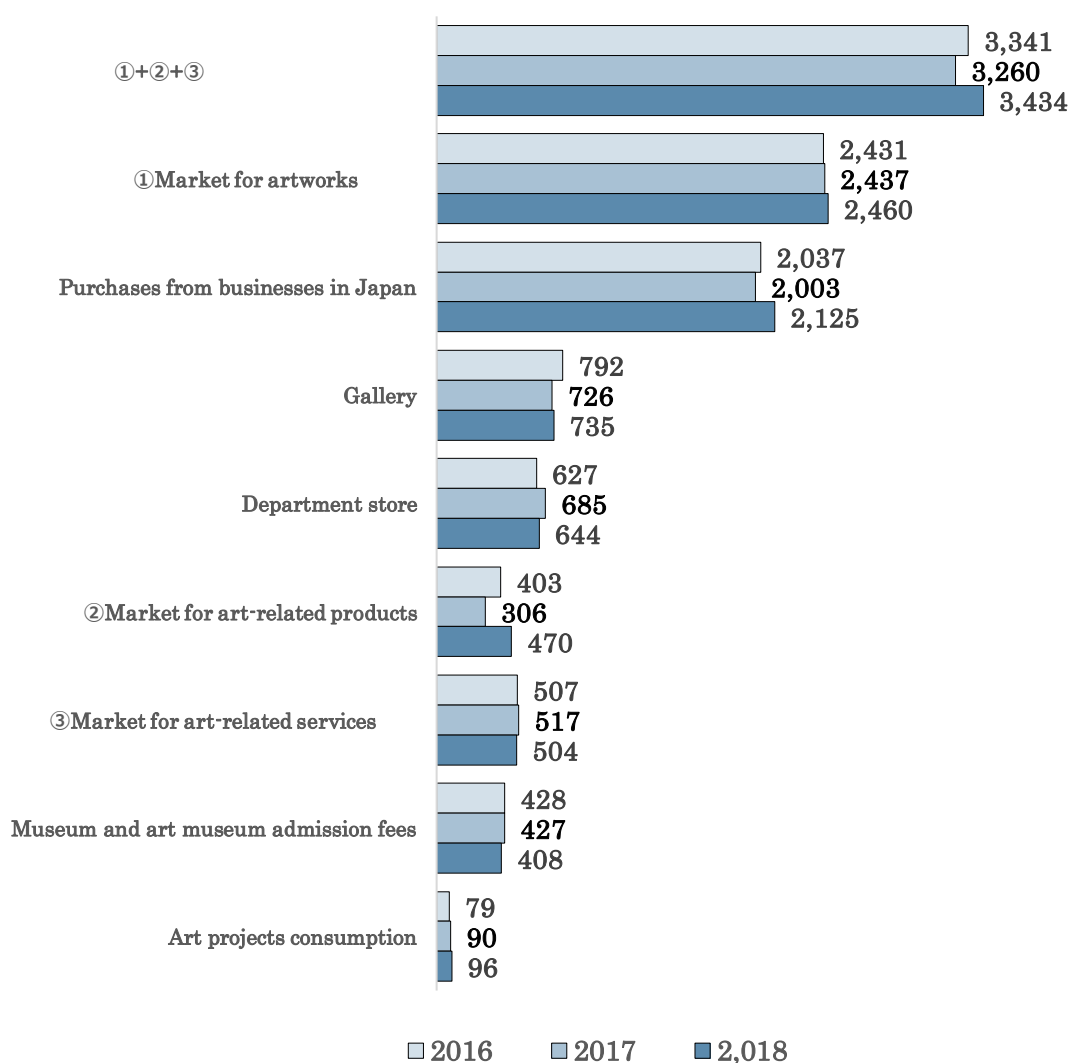
2-4: Comparison with Previous Surveys and Economic Conditions in Japan

Chart 10 shows the shifts in the main results of the Japanese art market survey over the past 3 years.

The market scale of the art industry in 2018 (estimated as a total of the values of (1), (2), and (3)) is the largest yet. Accordingly, the market for works of art shows a gradual year-on-year increase. The size of the market at galleries and department stores fluctuates a little each year, but galleries are stable at around 70 billion JPY and department stores at around 60 billion JPY.

Chart 10: Changes in Market Scales

(Unit=100M JPY)



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

The Japanese economy has been relatively stable in recent years, with the Nikkei 225 (Chart 11) and the Tokyo Stock Price Index (Chart 12) showing a rise when comparing the survey periods of this time with the previous survey (October 24–26, 2017 with September 28 – October 4, 2018). In addition, there is also an increase in assets (wealth) per adult and the numbers of affluent people (Chart 13).

Chart 11: Changes in the Nikkei 225 (Past 5 Years)



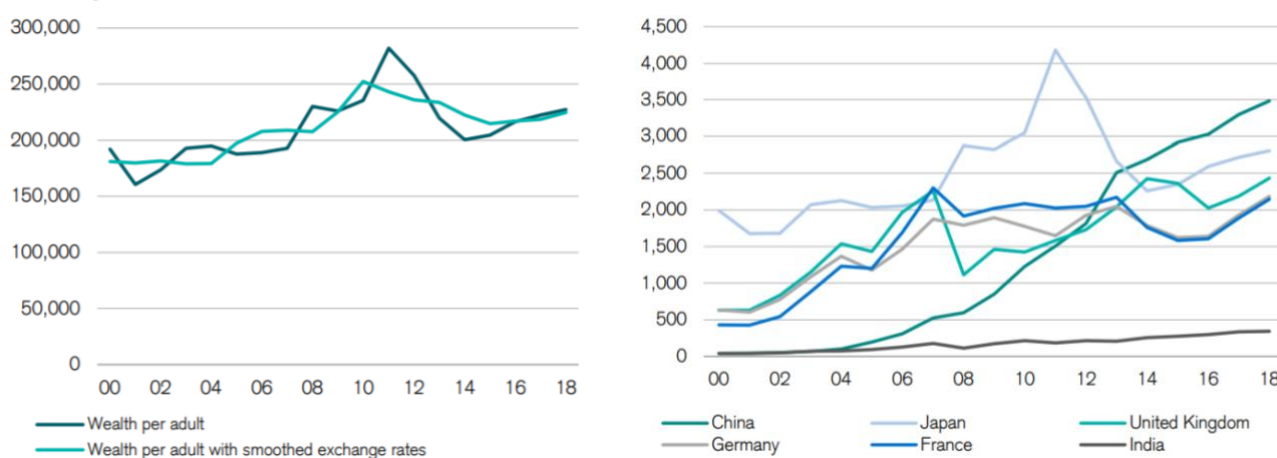
Source: Google

Chart 12: Changes in the Tokyo Stock Price Index (Past 5 Years)



Source: Google

Chart 12: Changes in Assets (US\$) per Adult in Japan¹² and Changes in Numbers of People (Thousands) per Country with Assets of 100 Million JPY or Above ¹³



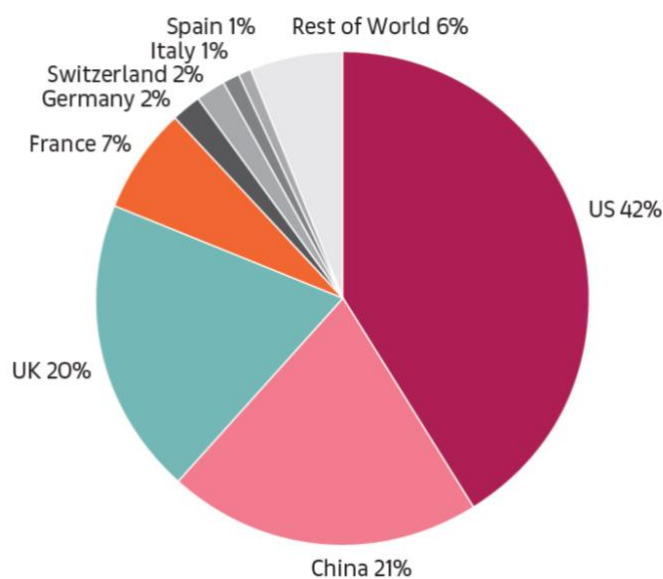
Source: Credit Swiss, "Global Wealth Report 2018"

¹² Original title: "Wealth per adult over time"

¹³ Original title: "Number of dollar millionaires (thousand) 2000–18, selected countries"

Surveys by the European Fine Art Foundation and Art Basel & UBS have not previously demonstrated the ratio of the art market in Japan to the world market. **Sales for works of art in Japan were calculated at 200.3 billion JPY in last year's survey. If this amount is compared to the scale of the world art market, we can estimate Japan's share as 2.8%, which would make Japan the fifth largest market in the world.** (Due to differences in estimation methods and definitions between the market scales of the surveys, however, this ranking should be treated as only a basic point of reference rather than an exact result.¹⁴)

Chart 14: Scale of Global Art Market by Country (2017)



Source: Art Basel & UBS, "The Art Market 2018" (adapted by Art Tokyo Association and Platform for Arts and Creativity)

¹⁴ Transaction amounts for artworks purchased by Japanese people resident in Japan are estimated in the Japanese Art Industry Market Research Report against estimates of artwork transaction amounts for each country according to global data from "The Art Market 2018" report by Art Basel and UBS.

Chapter 3: Artwork Imports and Exports

3-1: Calculation Method for Artwork Imports and Exports

This report also includes analysis of the state of artwork imports and exports. The analysis utilizes the Ministry of Finance’s official trade statistics and examines artworks according to 4 defined categories of “calligraphy and paintings,” “collages and similar decorative panels,” “prints (copperplates, woodblocks, lithographs, etc.),” and “sculptures, clay figures, cast figures, and similar sculptural items.”¹⁵

Chart 15: Artwork Category Definitions

Code	Definition	
9701.10	Calligraphy and paintings (only works directly made by hand; excludes processed items that are decorated or painted by hand as well as designs/plans and sketches)	Artworks are defined within these 4 categories
9701.90	Collages and similar decorative panels	
97.02	Prints (copperplates, woodblocks, lithographs, etc.)	
97.03	Sculptures, clay figures, cast figures, and similar sculptural items (regardless of material)	

Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

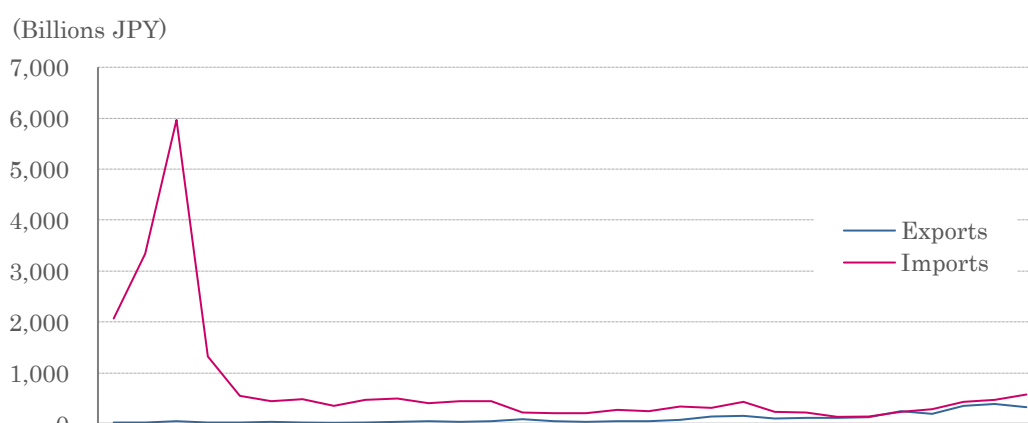
3-2: State of Imports and Exports

Charts 16 and 17 show artwork import and export amounts since 1988, based on these definitions.

Artwork imports had grown to 600 billion JPY by 1990 but fell to less than 50 billion JPY from 1993.

However, imports have been growing again since 2011 and stood at 58 billion JPY in 2017.

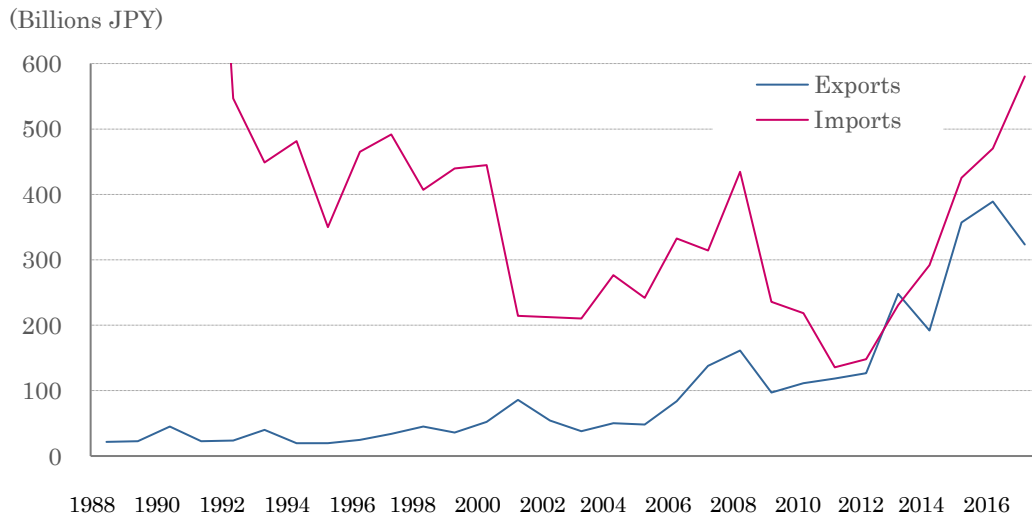
Chart 16: Changes in Artwork Imports and Exports



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

¹⁵ In the 2017 survey, artworks were defined within the 3 categories of “calligraphy and paintings,” “collages and similar decorative panels,” and “prints (copperplates, woodblocks, lithographs, etc.),” but a fourth category of “sculptures, clay figures, cast figures, and similar sculptural items” was added for the 2018 survey.

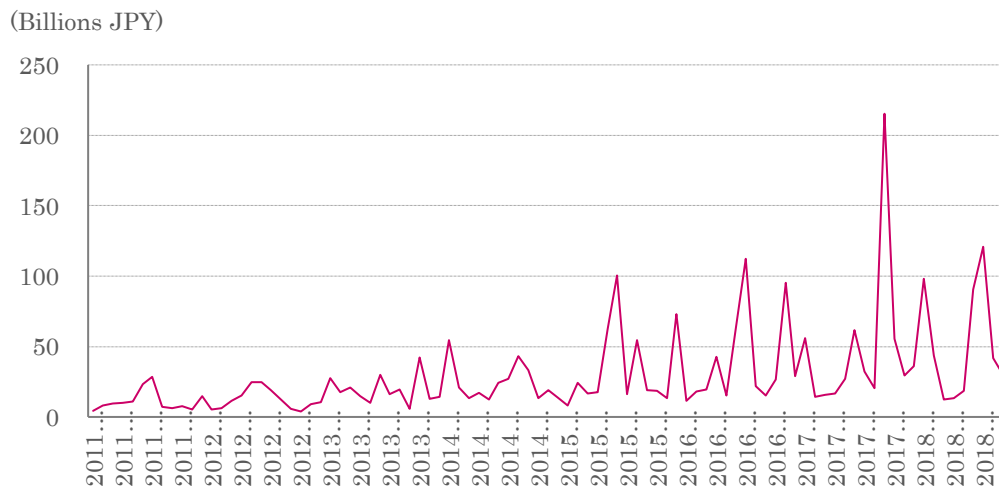
Chart 17: Changes in Artwork Imports and Exports (Enlarged)



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

Chart 18 shows changes in artwork imports per month since 2011. It indicates that the amount of imports fluctuates greatly depending on the month. The approximately 50 million JPY in annual imports is heavily influenced by the import of highly-priced works of art, such as the works by Jean-Michel Basquiat bought by a Japanese art collector at New York auctions for, respectively, \$57.28 million in May 2016 and \$110.5 million in May 2017. (The dates when the artworks were then brought over to Japan are unknown.)

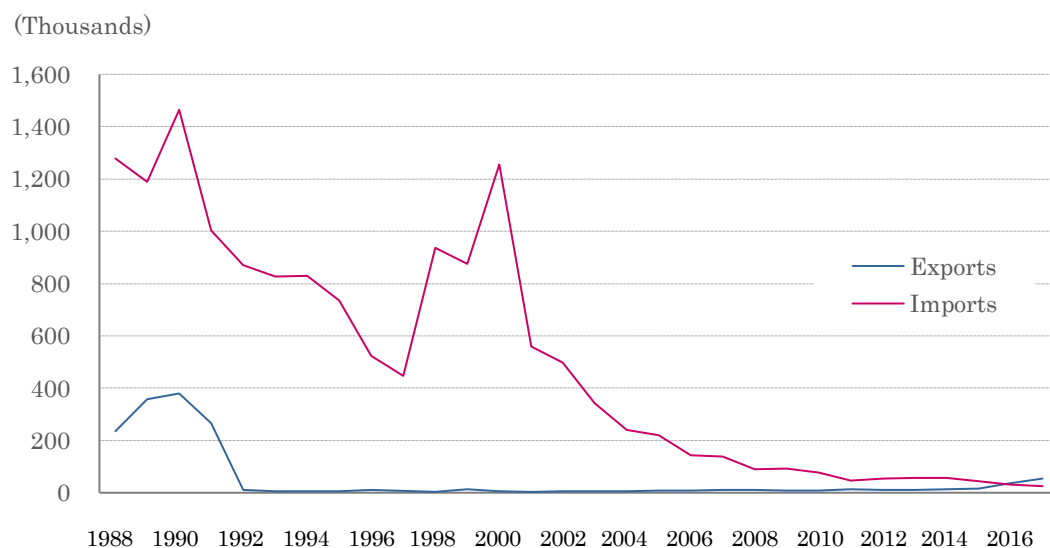
Chart 18: Changes in Artwork Imports by Month



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

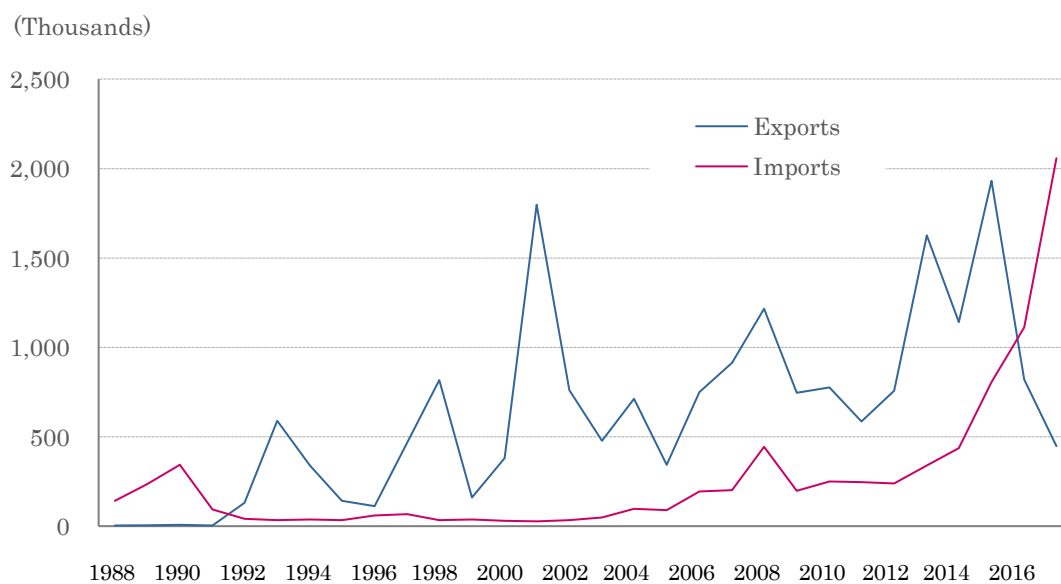
Charts 19 and 20 show changes in the quantity and unit prices for calligraphy imports and exports since 1988.¹⁶ They indicate a recent rise in the unit prices for imports.

Chart 19: Changes in Calligraphy Imports and Exports (Quantity)



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

Chart 20: Changes in Calligraphy Imports and Exports (Unit Prices)

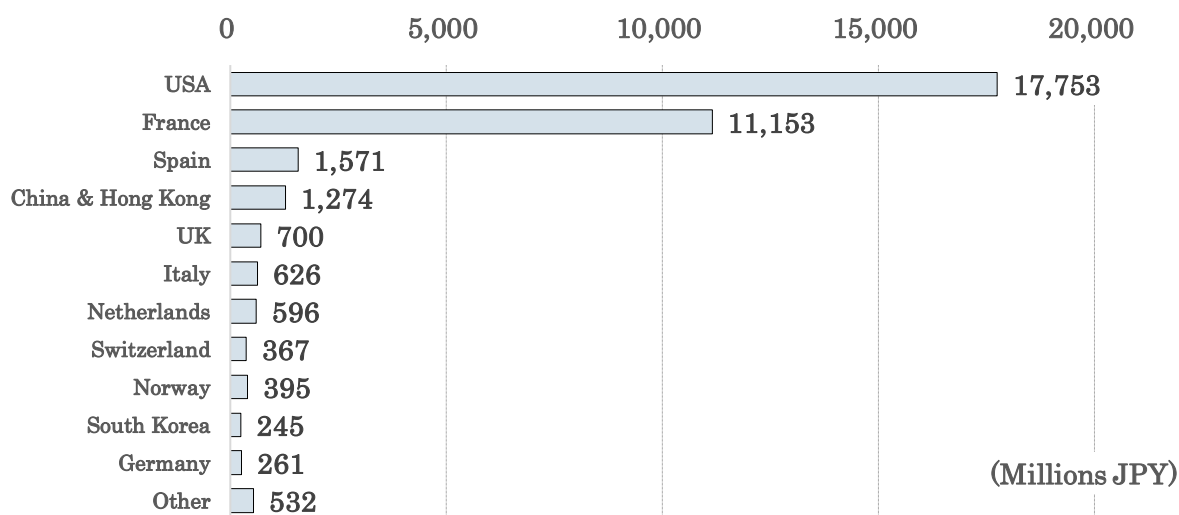


Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

¹⁶ These charts show the prices and quantity. Since unit prices differ significantly between the 3 categories of “calligraphy and paintings,” “collages and similar decorative panels,” and “prints (copperplates, woodblocks, lithographs, etc.),” analysis is restricted here only to calligraphy.

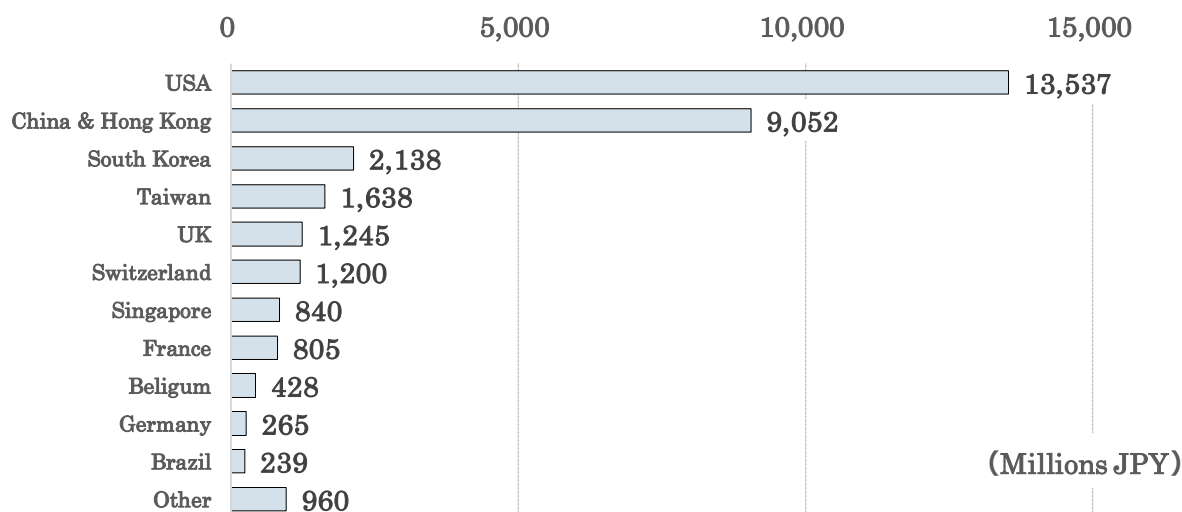
Chart 21 shows the amount of artwork imports per country of origin in 2017, while Chart 22 shows the corresponding results for exports. **For both imports and exports, the United States accounts for the largest amount. France and Spain are also the source of many imports, while many artworks are exported to Asian nations (China, South Korea, Taiwan, etc.).**

Chart 21: Artwork Imports by Country (2017)



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

Chart 22: Artwork Exports by Country (2017)



Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

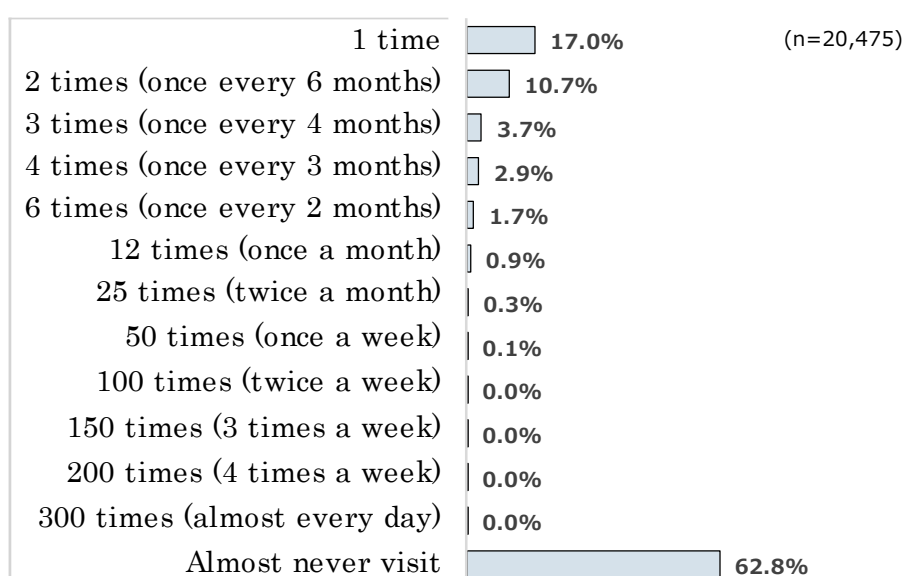
Chapter 4: Museum Visits and Visitor Needs

There is increasing attention in Japan recently on the potential of museums to enhance their attractiveness as destinations for foreign tourists (such as by extending opening hours into the nighttime) and as venues with unique appeals. However, while facilities and certain organizations publish partial figures on how museums (museums and art museums)¹⁷ are used on an individual basis, this is limited to comparative surveys of visits to major museums.¹⁸ As such, the Japanese Art Industry Market Research Survey here shares more concrete analysis and data on museum visits in Japan.

4-1: Museum Visits

Chart 23 shows the frequency of museum visits. Museums were visited on one or more occasions over the past year by 37.2% of people. The majority of these (27.7%) made between one or two visits to museums, and only a small number (1.5%) visited a museum at least once a month.

Chart 23: Frequency of Museum Visits in the Past Year



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁷ “Museum” is here used to refer to facilities or institutions called museums or art museums (that is, facilities commonly recognized as museums or art museums), which may not always correspond to the technical definition of a museum in the Museum Law.

¹⁸ The Japanese government conducts surveys such as the Cabinet Office’s public opinion poll on culture and the Ministry of Education, Culture, Sports, Science and Technology’s survey on social pedagogy, but data on annual museum and art museum visitor numbers and visit frequency are only partially included in these surveys.

Chart 24 shows museum visits in terms of days and times. It reveals that weekend visits are particularly concentrated for popular exhibitions (and especially so at the end of the exhibition period), and the ratio of weekend visits remains high even though certain museums implement measures to attempt to alleviate this, such as by adjusting prices during the exhibition period (and limiting the time when complimentary tickets can be used) or introducing advance reservation.

In addition, if we examine the data in terms of age groups (as shown in Chart 25), **weekend visits are particularly high among people in their twenties and thirties, who also show a comparatively high tendency to visit after 5pm on Fridays or at weekends, though the number of museums offering these kinds of opening hours remains limited. The results for visitors in their sixties, however, indicate almost no difference or trends in terms of the day of a visit.**

Chart 24: Museum Visits by Day and Time in the Past Year¹⁹

(Sample: 9,151)	9:00– 11:00	11:00– 13:00	13:00– 15:00	15:00– 17:00	17:00– 19:00	19:00– Midnight	Other Time	Total
Monday	4%	5%	6%	3%	1%	0%	0%	19%
Tuesday	6%	11%	10%	5%	1%	0%	0%	33%
Wednesday	7%	11%	12%	5%	1%	0%	0%	37%
Thursday	6%	11%	11%	6%	1%	1%	0%	36%
Friday	6%	10%	11%	6%	3%	2%	0%	40%
Saturday	13%	21%	26%	15%	4%	1%	0%	82%
Sunday / Public holidays	14%	25%	31%	17%	4%	1%	1%	93%
Total	57%	94%	108%	57%	16%	6%	3%	340%

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 25: Museum Visits by Day and Time in the Past Year (by Age Group)

【Twenties/Thirties】

(Sample: 2,022)	9:00– 11:00	11:00– 13:00	13:00– 15:00	15:00– 17:00	17:00– 19:00	19:00– Midnight	Other Time	Total
Monday	3%	3%	5%	3%	2%	1%	0%	17%
Tuesday	3%	4%	6%	5%	1%	1%	0%	20%
Wednesday	3%	4%	7%	4%	2%	1%	0%	23%
Thursday	3%	4%	7%	4%	1%	2%	0%	21%
Friday	2%	3%	5%	5%	4%	2%	1%	23%
Saturday	14%	23%	32%	22%	7%	2%	0%	100%
Sunday / Public holidays	16%	28%	41%	26%	9%	2%	1%	123%
Total	44%	69%	103%	70%	26%	11%	4%	327%

【Sixties and Older】

(Sample: 3,853)	9:00– 11:00	11:00– 13:00	13:00– 15:00	15:00– 17:00	17:00– 19:00	19:00– Midnight	Other Time	Total
Monday	5%	7%	8%	2%	0%	0%	0%	23%
Tuesday	9%	17%	15%	6%	1%	0%	0%	48%
Wednesday	10%	18%	17%	6%	1%	0%	1%	54%
Thursday	9%	18%	17%	7%	1%	0%	1%	53%
Friday	10%	18%	18%	7%	2%	1%	0%	55%
Saturday	11%	18%	20%	8%	1%	0%	1%	59%
Sunday / Public holidays	11%	18%	20%	8%	1%	0%	1%	58%
Total	65%	113%	115%	45%	7%	2%	3%	350%

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁹ Surveying respondents who said they had visited a museum at least once in the past year. (The same condition applies for Chart 25.)

Chart 26 shows the museums visited by people in the past year. The most-visited museums are dominated by museums in the Ueno area, such the Tokyo National Museum, National Museum of Western Art, Tokyo Metropolitan Art Museum, and Ueno Royal Museum. Other popular museums include The National Art Center, Tokyo and Edo-Tokyo Museum, as well as exhibitions at department stores.

Chart 27 shows these museums by visitor age groups. The top 10 museums remain largely consistent across the different age groups, though visits to Mori Art Museum are higher among people in their twenties, thirties, and forties.

Chart 26: Museums Visited in the Past Year²⁰

Tokyo National Museum	35%	The Bunkamura Museum of Art (Shibuya)	7%
National Museum of Western Art	29%	Mori Arts Center Gallery	5%
Tokyo Metropolitan Art Museum	26%	Yamatane Museum of Art (Hiroo)	5%
The National Art Center, Tokyo	23%	Mitsui Memorial Museum	5%
Ueno Royal Museum	18%	Idemitsu Museum of Arts	5%
Department stores	16%	Tokyo Metropolitan Teien Art Museum (Shirokanedai)	5%
Edo-Tokyo Museum	12%	Seiji Togo Memorial Sompo Japan Nipponkoa Museum	5%
Suntory Museum of Art	11%	Tokyo Station Gallery	4%
National Museum of Modern Art, Tokyo	11%	Sumida Hokusai Museum	4%
Galleries	11%	Nezu Museum (Aoyama)	4%
Mori Art Museum	9%	Tokyo Photographic Art Museum (Ebisu)	3%
Mitsubishi Ichigokan Museum, Tokyo	9%	Tokyo Opera City Art Gallery	3%
Other municipal or metropolitan art museum	7%	Galleries attached to brand stores	3%
Yokohama Museum of Art	7%	Museum of Contemporary Art Tokyo (Kiba, Kiyosumi)	2%

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 27: Museums Visited in the Past Year (Top 10 by Age Group)

Twenties/Thirties (Sample: 863)		Forties (Sample: 674)	
Tokyo National Museum	30%	Tokyo National Museum	38%
National Museum of Western Art	21%	National Museum of Western Art	27%
The National Art Center, Tokyo	17%	The National Art Center, Tokyo	25%
Ueno Royal Museum	17%	Tokyo Metropolitan Art Museum	23%
Tokyo Metropolitan Art Museum	17%	Ueno Royal Museum	19%
Mori Art Museum	11%	Department stores	17%
Department stores	10%	Mori Art Museum	11%
Galleries	8%	Suntory Museum of Art	10%
Suntory Museum of Art	8%	Edo-Tokyo Museum	10%
National Museum of Modern Art, Tokyo	7%	National Museum of Modern Art, Tokyo	10%
Fifties (Sample: 828)		Sixties and Older (Sample: 1,642)	
Tokyo National Museum	35%	Tokyo National Museum	37%
National Museum of Western Art	33%	National Museum of Western Art	33%
Tokyo Metropolitan Art Museum	27%	Tokyo Metropolitan Art Museum	33%
The National Art Center, Tokyo	24%	The National Art Center, Tokyo	27%
Ueno Royal Museum	20%	Department stores	19%
Department stores	15%	Ueno Royal Museum	19%
National Museum of Modern Art, Tokyo	13%	Edo-Tokyo Museum	16%
Edo-Tokyo Museum	12%	Suntory Museum of Art	15%
Suntory Museum of Art	11%	Galleries	14%
Mitsubishi Ichigokan Museum, Tokyo	10%	National Museum of Modern Art, Tokyo	14%

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

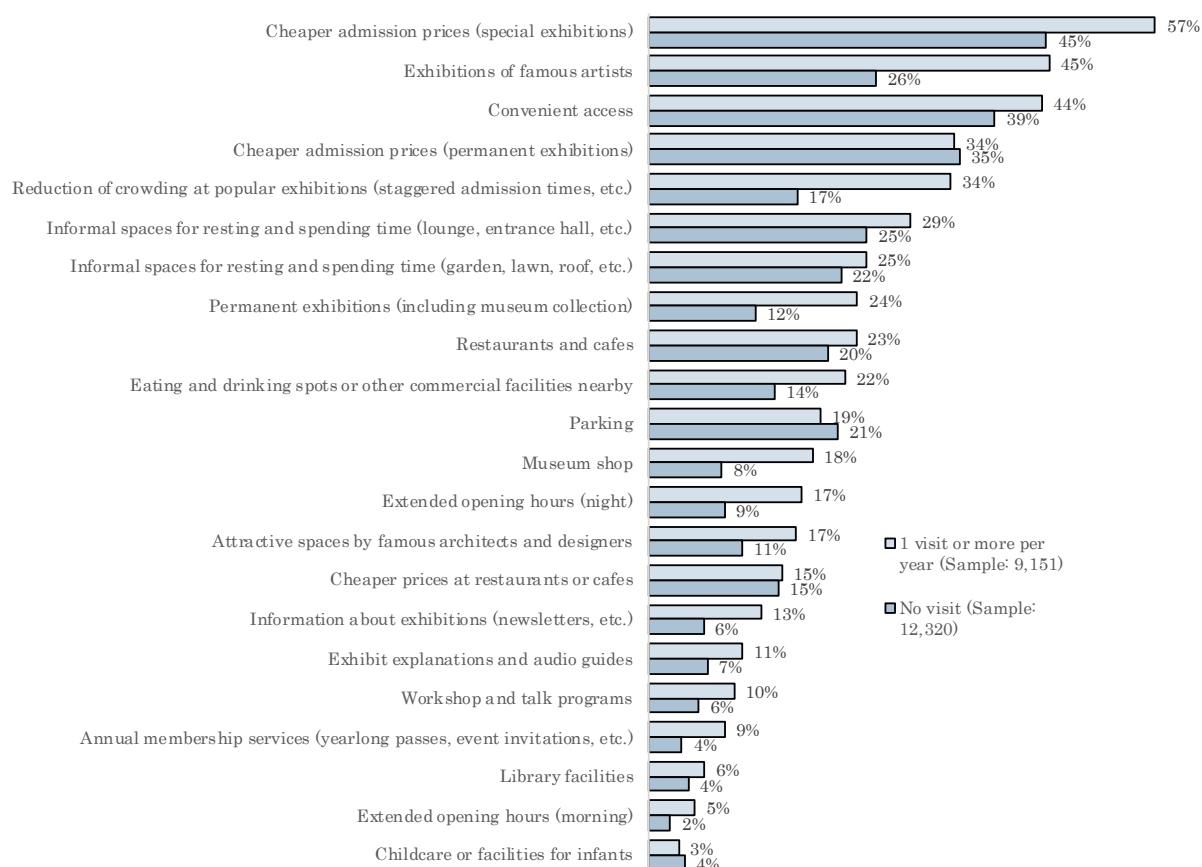
²⁰ Surveying respondents resident in Tokyo Metropolis or Kanagawa, Chiba, or Saitama prefectures, and who said they had visited a museum at least once in the past year.

4-2: Needs of Museum Visitors

Chart 28 shows the results of surveying what visitors want and desire from museums in Japan. In addition to “cheaper admission prices (special exhibitions, permanent exhibitions),” “exhibitions of famous artists,” “convenient access,” and “reduction of crowding at popular exhibitions,” responses for “informal spaces for resting and spending time” and “restaurants and cafes” were also high.

On the other hand, only 17% of respondents who visited a museum once or more in the past year selected “extended opening hours (at night),” which is related to the recent trend for museums to remain open at night but might suggest that this is not particularly important for large numbers of visitors.

Chart 28: Visitor Desires for Museums in Japan²¹



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

²¹ “None of the above / No circumstances would make me want to visit more” was selected by 4% of respondents who visited a museum once or more during the past year and 82% of respondents who had not visited a museum.

Chapter 5: Art and Internationally Well-Experienced Business People

2018 was a year of particularly high interest in the relationship between business and art. This trend was not unique to Japan, but is already well developed in the United States and Europe. The second special section of this report sheds light on various aspects of the relationship between business and art through analysis of “internationally well experienced business people” defined as a sample of 299 from the first survey respondents who corresponded to the 3 conditions of being “internationally well-experienced,”²² an “employed resident of Tokyo, Kanagawa, Saitama, or Chiba aged between their twenties and fifties,” and have “visited a museum or art museum at least twice in the past year.”

The attributes of the surveyed subjects are shown below. Of note is the high level of income, with people with a personal income of 10 million JPY or more accounting for close to 40%.

Chart 29: Second Survey Respondent Attributes (As Proportion of Overall Sample)

Gender				
Category	Business People	All Samples (After Weighting)	Distribution in Japan	
Male	173	58%	8,705	48%
Female	126	42%	9,262	52%

Age				
Category	Business People	All Samples (After Weighting)	Distribution in Japan	
15–24 years old	6	2%	1,978	11%
25–34 years old	41	14%	2,206	13%
35–44 years old	78	26%	2,836	16%
45–54 years old	115	38%	2,843	15%
55–64 years old	59	20%	2,504	15%
65 years old and older	0	0%	5,601	30%

Regional Classification				
Category	Business People	All Samples (After Weighting)	Distribution in Japan	
Hokkaido	0	0%	956	4%
Tohoku	0	0%	989	7%
Kanto	299	100%	7,268	34%
Hokuriku	0	0%	612	4%
Chubu	0	0%	1,954	13%
Kinki	0	0%	3,580	18%
Chugoku	0	0%	853	6%
Shikoku	0	0%	463	3%
Kyushu	0	0%	1,291	11%

Personal Income (Employed)				
Category	Business People	All Samples (After Weighting)	Distribution in Japan	
None	1	0.3%	275	2.6%
Under 1 million JPY	4	1.3%	1,591	14.9%
1 million – under 2 million JPY	10	3.3%	1,941	18.1%
2 million – under 3 million JPY	20	6.7%	1,804	16.8%
3 million – under 4 million JPY	22	7.4%	1,565	14.6%
4 million – under 5 million JPY	28	9.4%	1,145	10.7%
5 million – under 6 million JPY	16	5.4%	711	6.6%
6 million – under 6 million JPY	24	8.0%	564	5.3%
7 million – under 8 million JPY	25	8.4%	343	3.2%
8 million – under 9 million JPY	13	4.3%	211	2.0%
9 million – under 10 million JPY	21	7.0%	188	1.8%
10 million – under 15 million JPY	67	22.4%	263	2.5%
15 million JPY and over	48	16.1%	112	1.0%

Household Income				
Category	Business People	All Samples (After Weighting)	Distribution in Japan	
Under 3 million JPY	13	4%	8,473	48%
3 million – under 5 million JPY	24	8%	3,393	19%
5 million – under 7 million JPY	28	9%	2,313	13%
7 million – under 10 million JPY	63	21%	2,326	13%
10 million – under 15 million JPY	87	29%	1,063	6%
15 million JPY and over	84	28%	0	0%

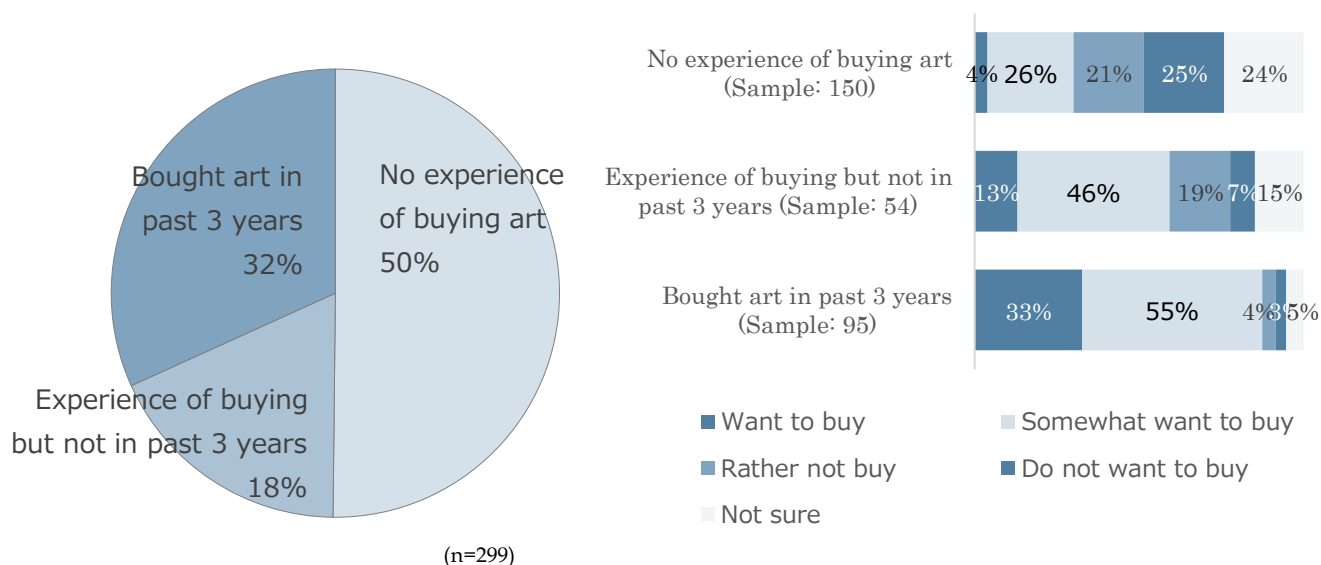
Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

²² Respondents were defined as “internationally well-experienced” if they had any of the following experiences: “lived abroad (1 month or more in Europe or the United States)” (5.1%), “lived abroad (1 month or more in an Asian country)” (2.6%), “lived abroad (1 month or more in country in another region)” (1.4%), “stayed overseas in the past year (a total stay of 2 weeks or more on vacation or for work)” (2.8%), or who has “experience working for a foreign company (where the official internal language is English)” (1.0%).

5-1: Art Purchases by Internationally Well-Experienced Business People

Chart 30 provides a summary of results related to purchases of artworks by business people as well as their future intentions to buy. **It shows that approximately half have experience of buying art (as opposed to 16% nationally), while around 30% of those who have never bought a work of art are interested in buying one.**

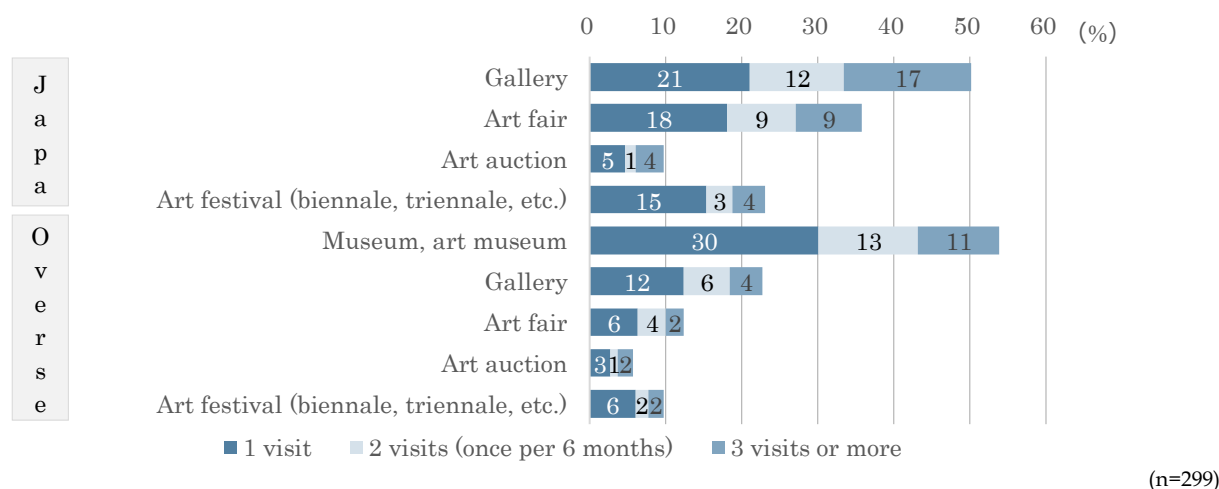
Chart 30: Art Purchases by Internationally Well-Experienced Business People and Future Intention to Buy



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

In addition, **approximately half of people had visited a gallery in Japan in the past year and over 30% had visited an art fair, indicating that business people do not distance themselves from such channels (that is, places to purchase artworks).**

Chart 31: Visit Frequency (by Channel) by Internationally Well-Experienced Business People

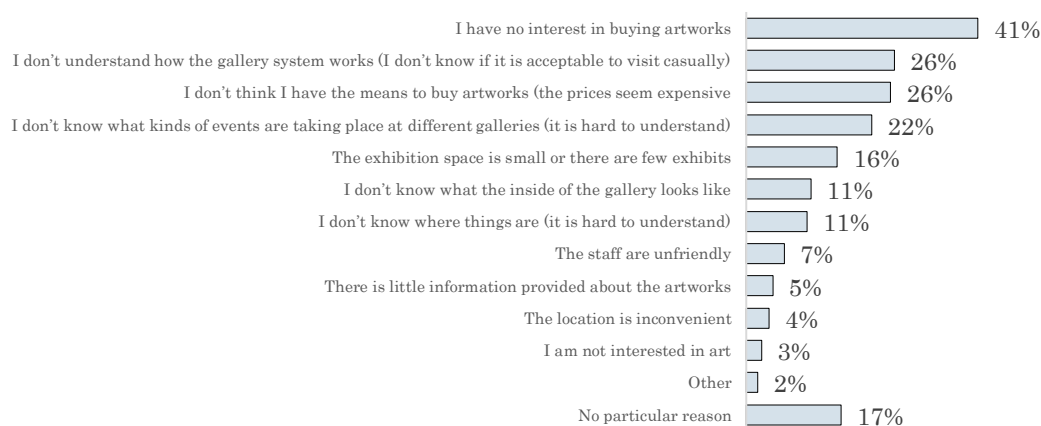


Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 32 shows the reasons that business people with no experience of buying art did not make purchases. Although certain reasons are difficult to tackle, such as “I have no interest in buying artworks” (41%) and “I don’t think I have the means to buy artworks (the prices seem expensive)” (26%), a high proportion of reasons were perceptions that the industry can solve with better communication, including “I don’t understand how the gallery system works (I don’t know if it is acceptable to visit casually)” (26%) and “I don’t know what kinds of events are taking place at different galleries (it is hard to understand)” (22%).

Chart 32: Reasons Internationally Well-Experienced Business People Do Not Buy Art

(n=149)



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 33 shows the things that prompted people to want to buy art (or want more to buy art), according to different categories of experience of buying artworks. Although the highest result for all categories was “I wanted to put the artwork on display,” among respondents who have experience of buying but not in the past 3 years, many high-scoring stimuli corresponded to life stages such as “Commemorating something (wedding, new baby, etc.)” (33%) or “Moving home, remodeling” (20%), while among respondents who had bought a work of art in the past 3 years, there is a marked difference in the stimuli, as indicated by the high results for “Advice from someone who knows a lot about art” (of which, “expert” was 26%, “friend” was 23%, and “gallery sales representative” was 22%) and “Speaking directly with the artist” (24%).

Chart 33: Stimulus for Wanting to Buy (or Wanting More to Buy) Art

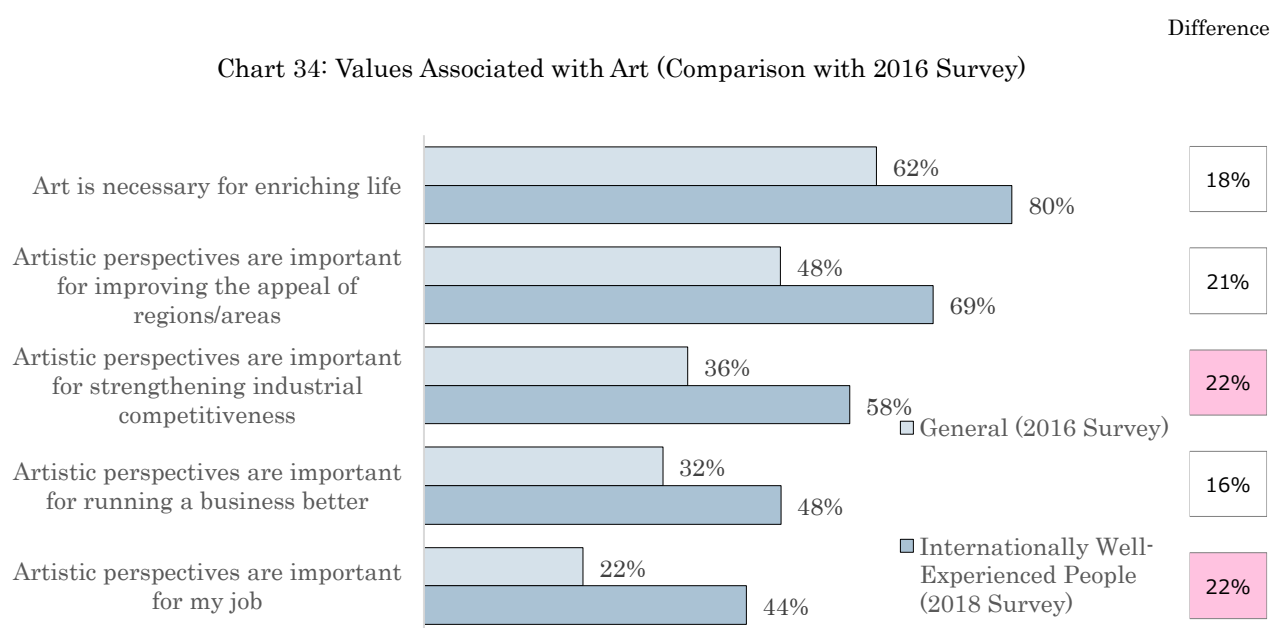
	Twenties/Thirties (Sample: 77)		Forties (Sample: 97)		Fifties (Sample: 125)	
I wanted to put the artwork on display	42%	1	42%	1	43%	1
Commemorating something (wedding, new baby, etc.)	30%	2	12%	6	15%	5
Advice from someone who knows a lot about art (friend)	21%	3	20%	2	14%	7
Advice from someone who knows a lot about art (expert)	18%	4	20%	2	18%	3
Moving home, remodeling	16%	5	7%	14	14%	8
Current price of the artwork is clear	14%	6	13%	4	20%	2
Advice from someone who knows a lot about art (gallery sales representative)	13%	7	13%	4	15%	5
Information about the artist and artwork was easily available online	13%	7	10%	10	12%	10
Speaking directly with the artist	12%	9	11%	8	17%	4
I understand the system for buying, reselling, storage, and inheritance	10%	10	12%	6	10%	11
I heard about an artist or artwork I like through an exhibition or in the media	10%	10	9%	13	8%	12
No circumstances would make me want to buy an artwork (or want to buy more)	9%	12	11%	8	13%	9
None of the above	5%	13	10%	10	6%	14
Advice from someone who knows a lot about (art) investments	4%	14	10%	10	7%	13

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

5-2: Values and Attitudes for Internationally Well-Experienced Business People

The 2016 survey surveyed all respondents (the entire sample) about the values they associate with art, but the 2018 survey asked business people about the same values.

While the results for business people tended to be higher overall than the 2016 results, disparity was particularly notable with the results for the values “Artistic perspectives are important for strengthening industrial competitiveness” and “Artistic perspectives are important for my job.” This would seem to indicate that internationally well-experienced people are more likely to view artistic perspectives as important for business.

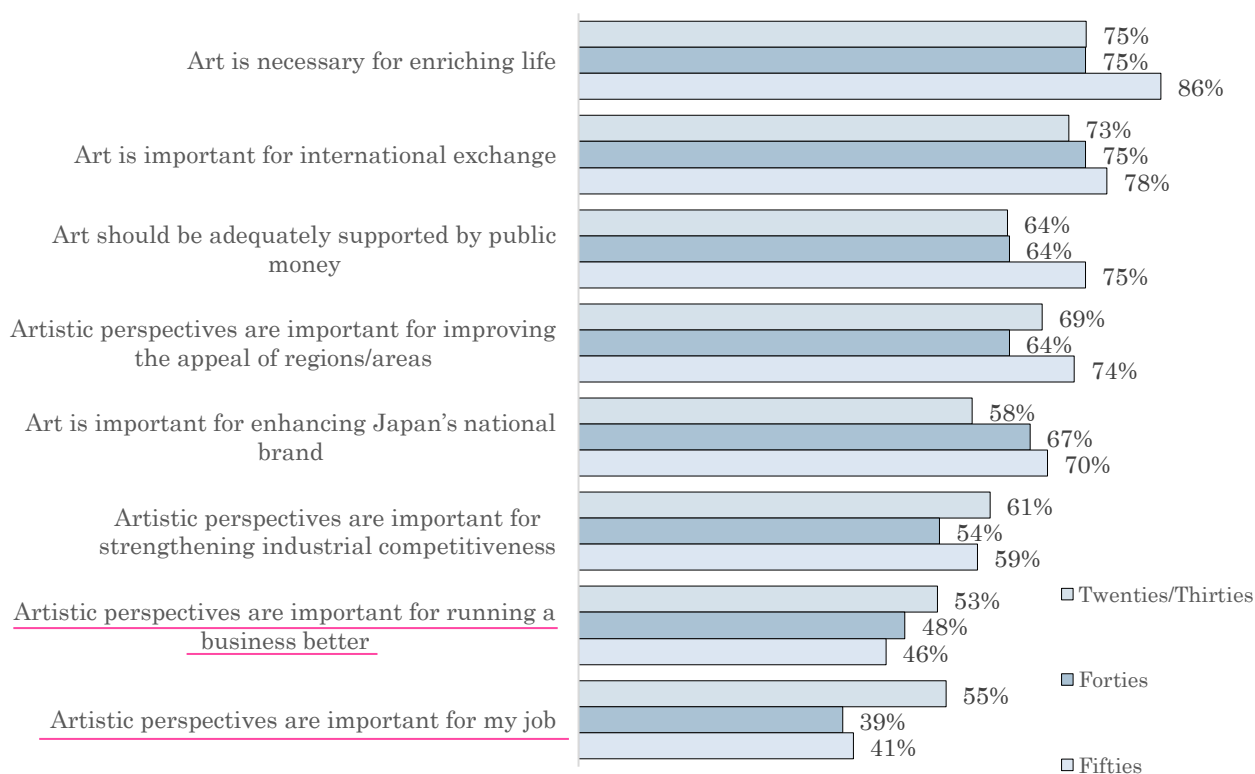


Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 35 shows the same results for business people by age group. For many of the values, results are higher for respondents in their fifties, **though respondents in their twenties and thirties had the highest results for the values “Artistic perspectives are important for running a business better” and “Artistic perspectives are important for my job.” This indicates that younger generations are more likely to connect artistic perspectives to business in their attitudes.**

Chart 35: Values Associated with Art (by Age Group)

(n=125)



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Japan is today putting much effort into attracting overseas tourists in the belief that tourism is a key industry for the future. As such, we cannot ignore the influence of internationally well-experienced business people, who can be presumed to have many non-Japanese friends and acquaintances. Chart 36 shows the results from surveying the respondents for the type of places or experiences they proactively want to introduce to non-Japanese friends and acquaintances visiting Japan.

Many people's recommendations were related to uniquely Japanese elements, such as temples, shrines, and gardens (67%), inns and hot springs (61%), traditional streets (57%), and Japanese cuisine, but around a quarter of people also said that they would introduce their friends and acquaintances to art museums and museums.

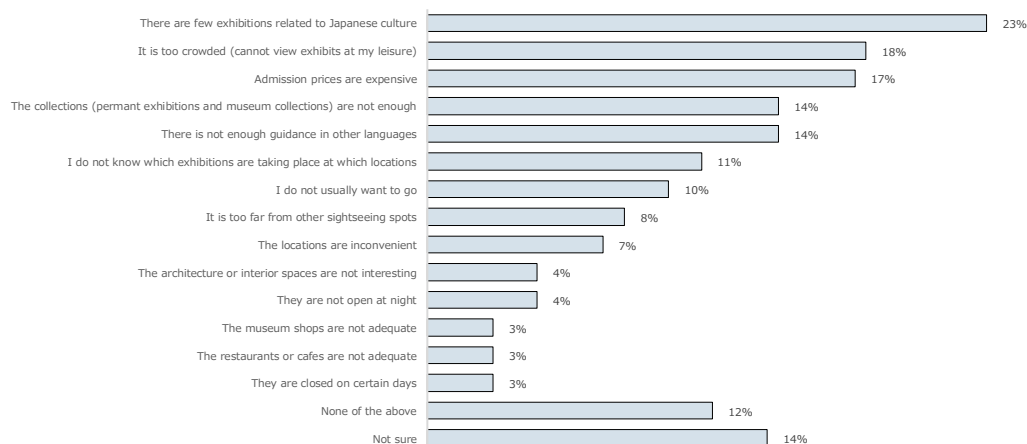
The most common result for the reasons given by respondents for not introducing art museums and museums (Chart 37) was "There are few exhibitions related to Japanese culture" (23%). Japan's many exhibitions rooted in European and American culture may well prove a hindrance in regard to developing strategies that harness art museums and museums for inbound tourism.

Chart 36: Recommended Places for Foreign Friends and Acquaintances Visiting Japan

Temples, shrines, gardens	67%	Tokyo viewing spots (observation decks, etc.)	20%
Inns, hot springs (including day trips)	61%	Japanese subculture (maid cafes, Takeshita Street, etc.)	19%
Traditional streets	57%	Latest Japanese culture	19%
Relatively expensive Japanese cuisine (sushi, tempura, sukiyaki, shabushabu, etc.)	57%	Notable architecture (modern and contemporary architecture)	17%
Relatively cheap Japanese cuisine (izakaya, soba, udon, okonomiyaki, etc.)	49%	Shopping for clothing and accessories	15%
Places for experiencing/seeing traditional culture	45%	Japanese rural lifestyle	14%
Shopping for everyday items	31%	Theme parks	14%
Ramen and Chinese cuisine	28%	Nightlife spots (karaoke, nightclubs, bars, etc.)	11%
Japanese confectionary and sweets	28%	Watching sports (sumo, baseball, etc.)	11%
Morning markets and other markets (fish, vegetables, and other food product)	25%	Western-style food (French, Italian, steak, etc.)	10%
Museums and art museums	25%	Stores with distinctive exterior/interior designs	8%
Places for enjoying nature	24%	Galleries	4%
Places representative of contemporary Tokyo	23%	None of the above	0%
Places that retain a sense of the Showa period	22%	Not sure	4%
Shopping for electrical appliances	20%		

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 37: Reasons for Not Introducing Art Museums and Museums to Foreign Friends and Acquaintances Visiting Japan (n=224)

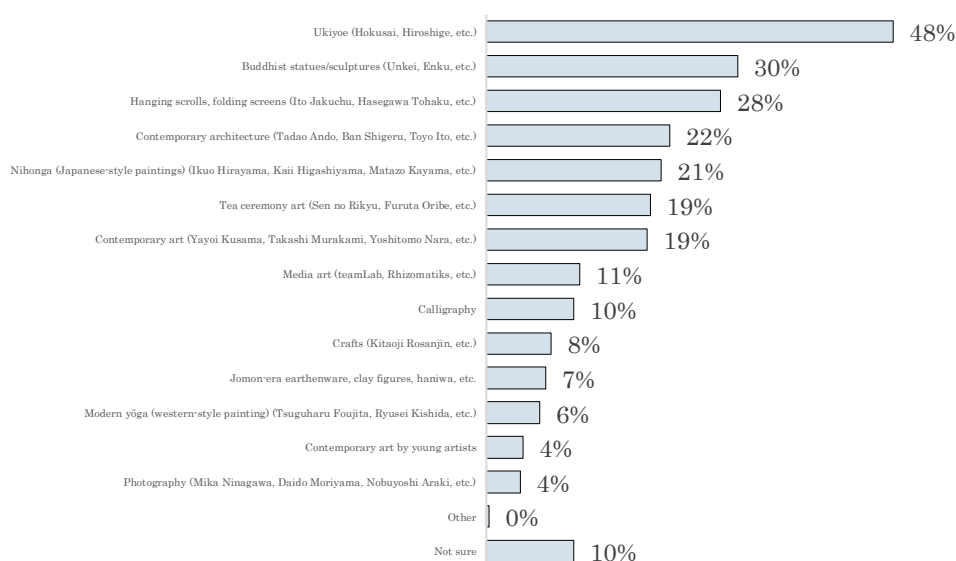


Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 38 shows the art genres that internationally well-experienced business people regard Japan as a world leader in. With 48%, the result for *ukiyo-e* was by far the highest, though Buddhist statues/sculptures and hanging scrolls/folding screens also had high results.

When these results are viewed by age group (Chart 39), the result for *ukiyo-e* remained highest for all groups, though contemporary architecture and tea ceremony art also had high results among respondents in their twenties and thirties, which indicates a slightly different perspective to those aged 40 and above.

Chart 38: Art Genres Where Japan Leads the World (n=299)



Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 39: Art Genres Where Japan Leads the World (by Age Group)

	Twenties/Thirties (Sample: 77)	Forties (Sample: 97)	Fifties (Sample: 125)
<i>Ukiyo-e</i> (Hokusai, Hiroshige, etc.)	34%	54%	53%
Contemporary architecture (Tadao Ando, Ban Shigeru, Toyo Ito, etc.)	27%	21%	19%
Tea ceremony art (Sen no Rikyu, Furuta Oribe, etc.)	27%	15%	18%
Buddhist statues/sculptures (Unkei, Enku, etc.)	21%	29%	36%
Contemporary art (Yayoi Kusama, Takashi Murakami, Yoshitomo Nara, etc.)	19%	18%	20%
Media art (teamLab, Rhizomatiks, etc.)	18%	11%	6%
Hanging scrolls, folding screens (Ito Jakuchu, Hasegawa Tohaku, etc.)	14%	27%	37%
<i>Nihonga</i> (Japanese-style paintings) (Ikuo Hirayama, Kaii Higashiyama, Matazo Kayama, etc.)	14%	22%	24%
Calligraphy	13%	8%	10%
Crafts (Kitaoji Rosanjin, etc.)	6%	8%	8%
Modern <i>yōga</i> (western-style painting) (Tsuguharu Foujita, Ryusei Kishida, etc.)	5%	4%	9%
Jomon-era earthenware, clay figures, <i>haniwa</i> , etc.	5%	4%	10%
Contemporary art by young artists	5%	6%	2%
Photography (Mika Ninagawa, Daido Moriyama, Nobuyoshi Araki, etc.)	1%	5%	5%

Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

Closing Remarks

This marked the third time that the survey has been conducted since 2016. By continuing to conduct surveys from fixed points in time, we can accumulate important statistical data for discussing the art industry in Japan.

The art market has now shown growth for 3 years in a row, influenced by economic conditions. 2019 and 2020 will feature many developments that will further impact consumer mindsets and the economy (such as the consumption tax hike and major sporting events), necessitating particular attention on the strong influence they will likely have on the art market.

Until 2017, the survey focused on deepening our understanding of the conditions for buying artworks and the values associated with art for particular segments (business owners, collectors, art enthusiasts, etc.). The 2018 survey, however, had a focus on museum visits and the needs for museum visitors, which is an area of recently growing interest for government policy, and what art means for internationally well-experienced business people, which also relates to the link between art and business that has become a popular topic in publishing. Accordingly, the future scope of the Japanese Art Industry Market Research Survey will expand to cover not only conditions directly related to buying works of art, but also deal more generally and comprehensively with the relationship between society, industry, and art.

Agency for Cultural Affairs 2018 Art Market Stimulation Program

Japanese Art Industry Market Research Report 2018

Survey Organizer: Art Tokyo Association (Representative: Naohiko Kishi)

Survey Co-organizer: Platform for Arts and Creativity (Representative Director: Akiyoshi Watae)

Credits

Art Tokyo Association

Marketing & Communications Executive Director: Hiroaki Sumiya (planning, survey design, editing)

Marketing & Communications: Nobuyuki Sawada (planning, survey design, editing)

Platform for Arts and Creativity

Representative Director: Akiyoshi Watae (survey design, analysis, report writing)