

Japanese Art Industry Market Research Report 2019

Agency for Cultural Affairs, Art Tokyo Association

Planning and Survey : 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 special sections on the values associated with art (Chapter 4), the art industry by region (Chapter 5), and the artists whose work is most actively bought and sold (Chapter 6).

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 23,280 samples, a similar amount to previous surveys. The second survey analyzed a defined group of samples from the first set of respondents comprising people who had bought a work of art in the past three years, organized by their area of residence.**

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 The following samples were collected by area: Hokkaido/Tohoku: 50; Tokyo: 158; Kanto (excluding Tokyo): 134; Chubu: 88; Osaka: 56; Kinki (excluding Osaka): 70; Chugoku/Shikoku: 39; and Kyushu/Okinawa: 42.

² Since the number of unemployed persons cannot be distributed by personal income, the survey aimed to distribute them by household income. 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.

³ 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 19–September 24, 2019
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>People who bought a work of art for 100,000 JPY or more in the past 3 years</p> <p>- Targets set and collected per region</p>
Valid Samples	<p>First Survey: 23,280 samples</p> <p>Second Survey: 673 samples</p> <ul style="list-style-type: none"> - Hokkaido/Tohoku: 50 - Tokyo: 158 - Kanto (excluding Tokyo): 134 - Chubu: 88 - Osaka: 56 - Kinki (excluding Osaka): 70 - Chugoku/Shikoku: 39 - Kyushu/Okinawa: 42
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 <ul style="list-style-type: none"> - Effects of viewing and buying art - Values associated with artistic perspectives - Area of residence - 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"> - Life values - Total floor area of residence - Amount of holdings per type - Location where artwork was bought - Aim or reason for buying the artwork - Source of information related to buying artworks - Values associated with buying or possessing art - Topics of discussion about art - Concerns about possessing art - Future intention to buy works of art <p>(10 questions in total)</p>

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

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	10,626	50%	8,172	48%
Female	10,664	50%	8,438	52%

Age				
Category	Simple Aggregate	After Weighting	Distribution in Japan	
15 – 24 Years Old	1,276	6%	1,461	11%
25 – 34 Years Old	2,697	13%	1,903	12%
35 – 44 Years Old	3,578	17%	2,686	15%
45 – 54 Years Old	3,906	18%	2,870	16%
55 – 64 Years Old	4,400	21%	2,408	14%
65 Years Old and over	5,433	26%	5,282	32%

Regional Classification				
Category	Simple Aggregate	After Weighting	Distribution in Japan	
Hokkaido	918	4%	797	4%
Tohoku	1,000	5%	868	7%
Kanto	9,280	44%	6,601	34%
Hokuriku	651	3%	571	4%
Chubu	2,592	12%	2,143	13%
Kinki	4,039	19%	3,222	18%
Chugoku	942	4%	812	6%
Shikoku	466	2%	411	3%
Kyushu	1,402	7%	1,183	11%

Personal Income (Employed)				
Category	Simple Aggregate	After Weighting	Distribution in Japan	
None	250	2.0%	211	2.1%
Under 1 Million JPY	1,468	12.3%	1,516	14.6%
Under 1 Million JPY	1,505	12.0%	1,435	14.2%
1 Million · Under 2 Million JPY	1,903	15.1%	1,825	18.0%
2 Million · Under 3 Million JPY	1,720	13.7%	1,672	16.5%
3 Million · Under 4 Million JPY	1,534	12.2%	1,533	14.6%
4 Million · Under 5 Million JPY	1,153	9.2%	1,104	10.9%
5 Million · Under 6 Million JPY	744	5.9%	709	7.0%
6 Million · Under 7 Million JPY	565	4.5%	545	5.4%
7 Million · Under 8 Million JPY	630	5.0%	326	3.2%
8 Million · Under 9 Million JPY	424	3.4%	233	2.3%
9 Million · Under 10 Million JPY	344	2.7%	190	1.9%
10 Million · Under 15 Million JPY	1,090	8.7%	257	2.5%
15 Million JPY and Over	719	5.7%	86	0.9%

Household Income				
Category	Simple Aggregate	After Weighting	Distribution in Japan	
Under 3 Million JPY	5,311	27%	7,666	34%
3 Million · Under 5 Million JPY	4,520	23%	3,174	23%
5 Million · Under 7 Million JPY	3,218	16%	2,250	16%
7 Million · Under 10 Million JPY	3,994	20%	2,193	15%
10 Million · Under 15 Million JPY	2,645	13%	993	9%
15 Million JPY and Over	0	0%	0	3%

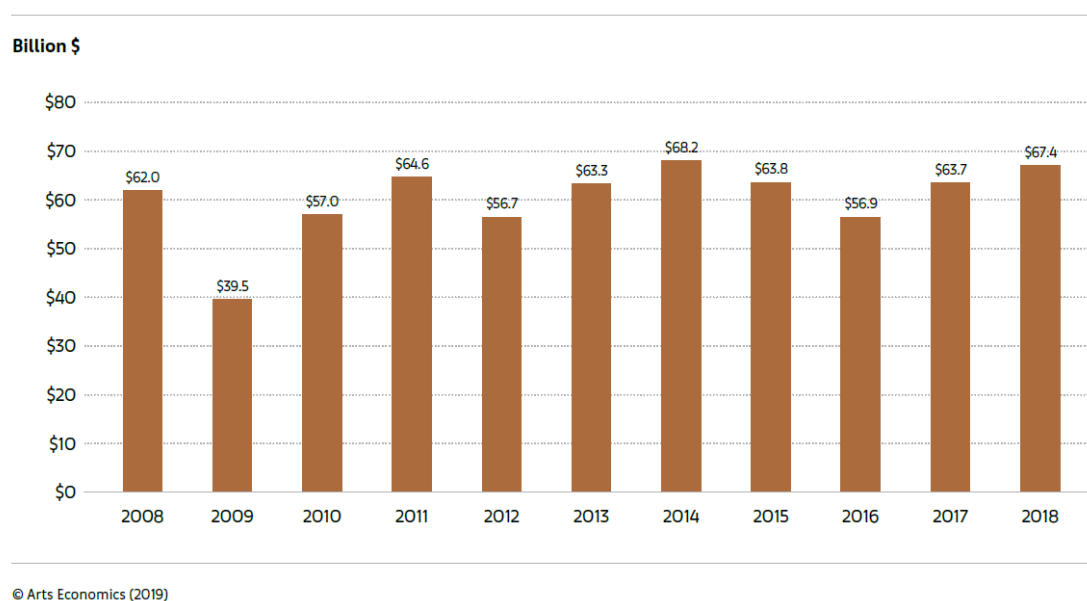
Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chapter 2: Market Scale of the Art Industry in Japan

2-1: Global Art Market Scale

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 has since recovered and reached approximately \$67.4 billion (approximately 7.58 trillion JPY³) in 2019.

Chart 3: Scale of Global Art Market



Source: Art Basel & UBS, "The Art Market 2019"

³ Based on an official Ministry of Finance exchange rate of 1 USD to 112.43 JPY from December 30, 2018 until January 5, 2019

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 4: 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: <ul style="list-style-type: none"> • 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 ⁴
2. Market for art-related products	Purchases of the following kinds of art-related products by residents of Japan: <ul style="list-style-type: none"> • Posters and postcards of famous paintings • Exhibition catalogues and art books • Merchandise based on famous paintings, sculptures, etc. 	
3. Market for art-related services	<ul style="list-style-type: none"> • 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.⁵

Art projects consumption was estimated by annualizing the direct consumption expenditure for major art festivals (only those with public reports) held since 2016, based on their frequency (biennale: every 2 years; triennale: every 3 years), and then calculating a total.⁶

⁴ 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.).

⁵ 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.

⁶ Yokohama Triennale, Aichi Triennale, Sapporo International Art Festival, Echigo-Tsumari Art Triennale, Setouchi Triennale, Ichihara Art x Mix, Saitama Triennale, KENPOKU ART, Okayama Art Summit, Northern Alps Art Festival, Oku-Noto Triennale, Reborn-Art Festival, etc.

2-3: Japanese Art Market Scale Estimate Results

Chart 5 shows the results from the estimate of the scale of the Japanese art market by type of art. The market for art-related products is estimated at 49.1 billion JPY.

The market estimates by sales channel are shown in Chart 6. **Purchases of works of art totaled an estimated 258 billion JPY.** Of these, 227 billion JPY were purchases from Japanese businesses. **Similar to the results of previous surveys, galleries in Japan accounted for 98.2 billion JPY of the sales, while 56.7 billion JPY of the sales were at department stores in Japan.**

Chart 5: Market Scale for Works of Art and Art-related Products by Type⁷

(Unit=100M JPY) (n=23,280)

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

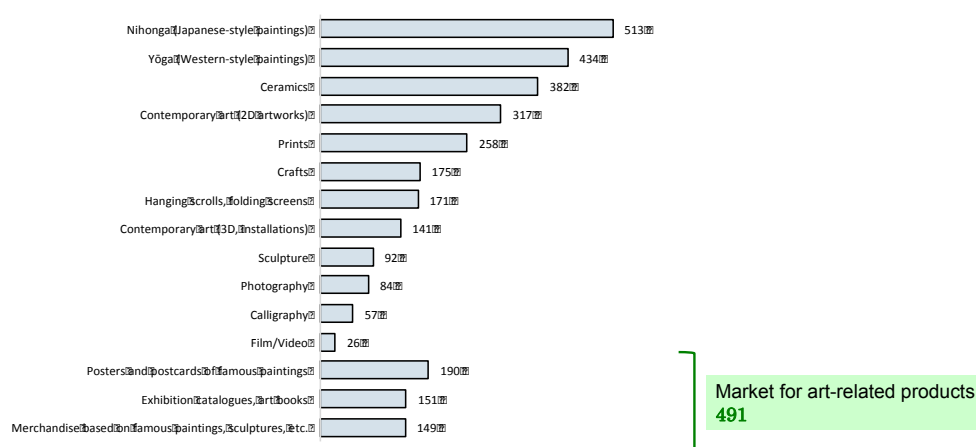
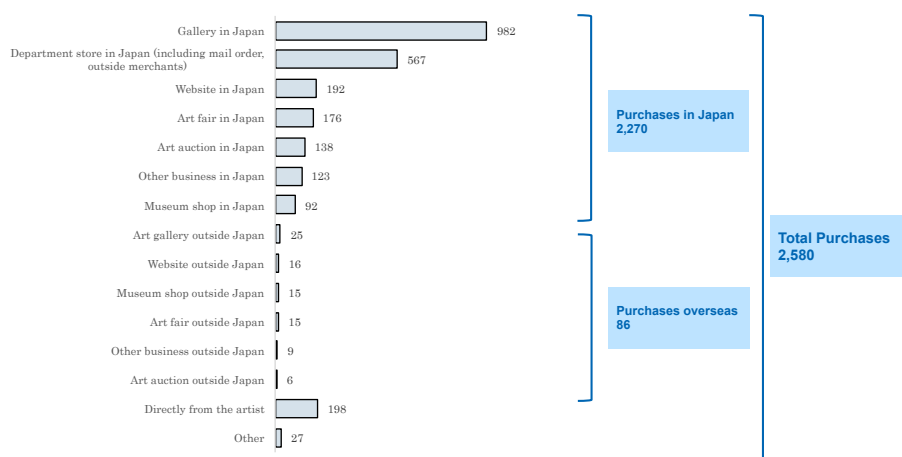


Chart 6: Market Scale for Works of Art by Sales Channel

(Unit=100M JPY)(n=23,280)



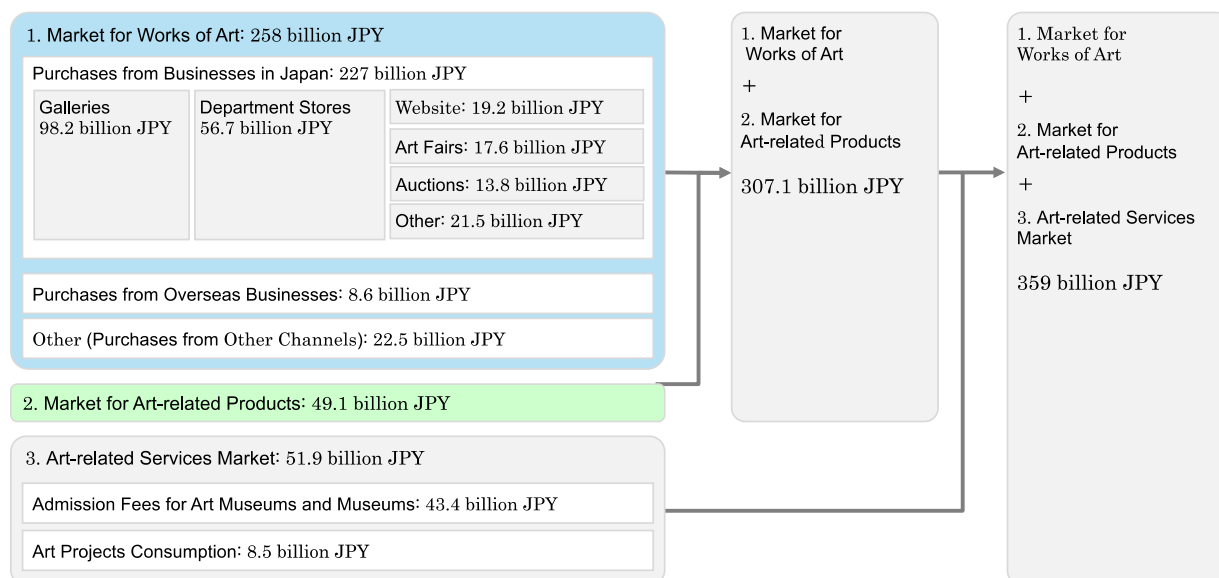
Source: Japanese Art Industry Market Research Survey 2018 (Art Tokyo Association, Platform for Arts and Creativity)

⁷ 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 43.4 billion JPY, while art projects consumption was 8.5 billion JPY. Considered together as “art-related services,” they total 51.9 billion JPY.

Combining the totals for the market for works of art (258 billion JPY⁸), art-related products (49.1 billion JPY), and art-related services (51.9 billion JPY), the overall scale of the art market is estimated at 359 billion JPY.

Chart 7: Overview of Art-related Market Scale⁹



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

⁸ 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.

⁹ 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.

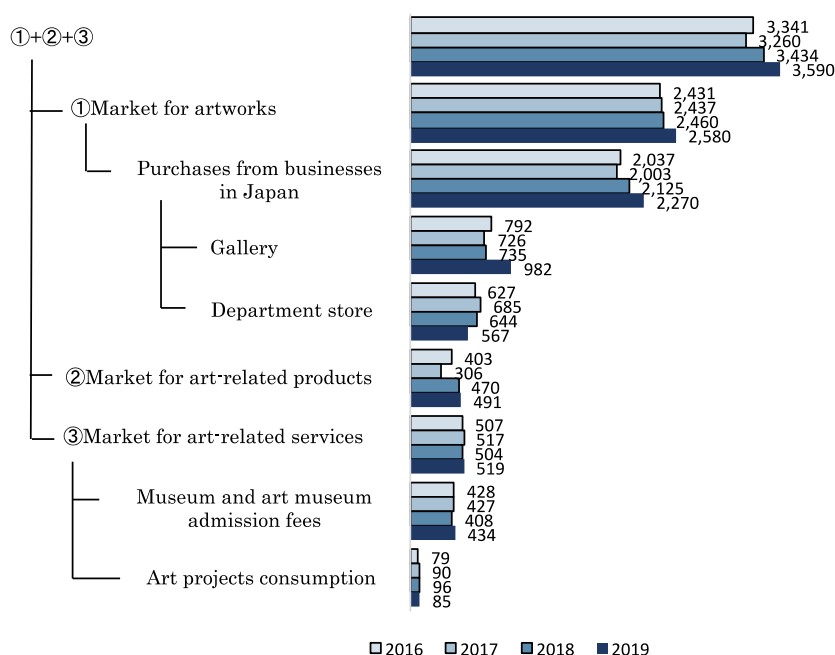
2-3: Comparison with Previous Surveys

Chart 8 shows the shifts in the main results of the Japanese art market survey over the past 4 years.

The market scale of the art industry in 2019 (estimated as a total of the values of ①Works of Art, ②Art-related Products and ③Art-Related Services) has increased from last year to reach its highest level yet. This is the result of a rise in sales from galleries, even though sales at department stores went down. In addition, the markets for art-related products and museum and art museum admission fees are the largest ever..

Chart 8: Changes in Market Scales

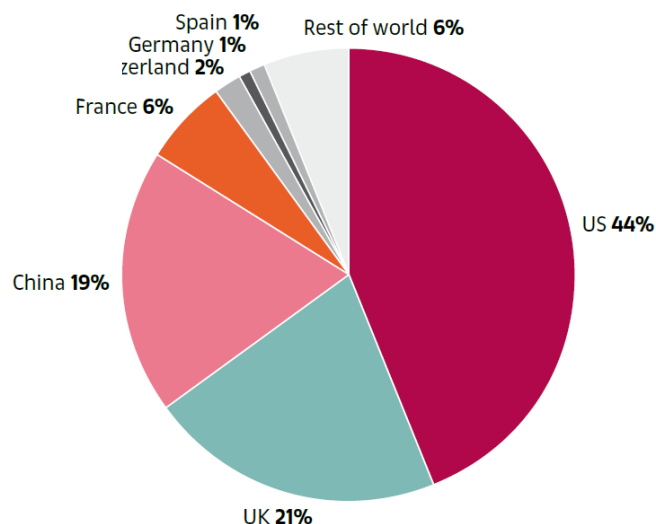
(Unit=100M JPY)



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Sales for works of art in Japan were calculated at 212.5 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.¹⁰)

Chart 9: Scale of Global Art Market by Country (2018)



© Arts Economics (2019)

Source: Art Basel & UBS, "The Art Market 2019" (adapted by Art Tokyo Association and Platform for Arts and Creativity)

¹⁰ 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.”¹¹

Chart 10: Artwork Category Definitions

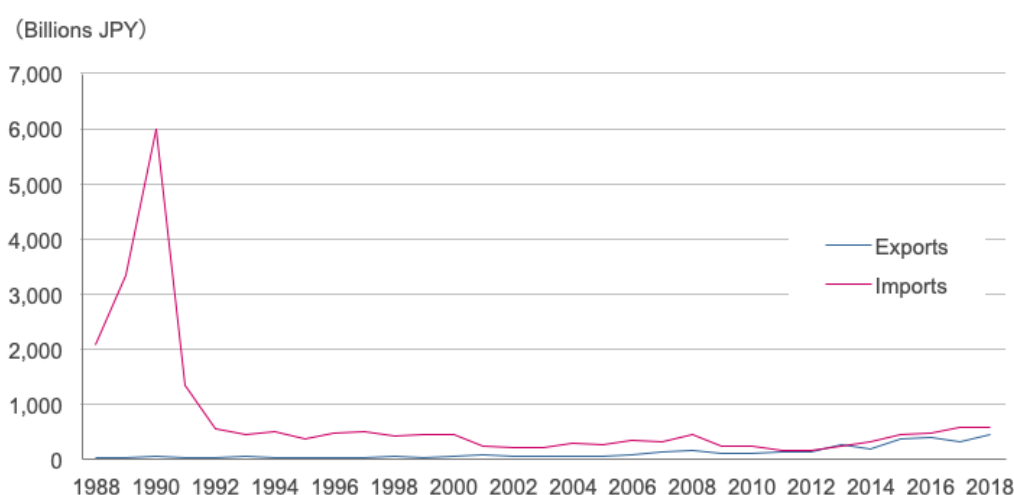
Code	Definition	
9701.10	Calligraphy and paintings (only works directly made by hand; excludes processed items that are decorated or painted by hand as well as designs/plans and sketches)	Artworks are defined within these 4 categories
9701.90	Collages and similar decorative panels	
97.02	Prints (copperplates, 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 11 and 12 show artwork import and export amounts since 1988, based on these definitions. **Artwork imports had grown to 600 billion JPY by 1990 but dropped to less than 50 billion JPY from 1993. However, imports have been rising again since 2011 and reached 55.8 billion JPY in 2018. In particular, exports have recently shown growth, achieving a record 43 billion JPY in 2018.**

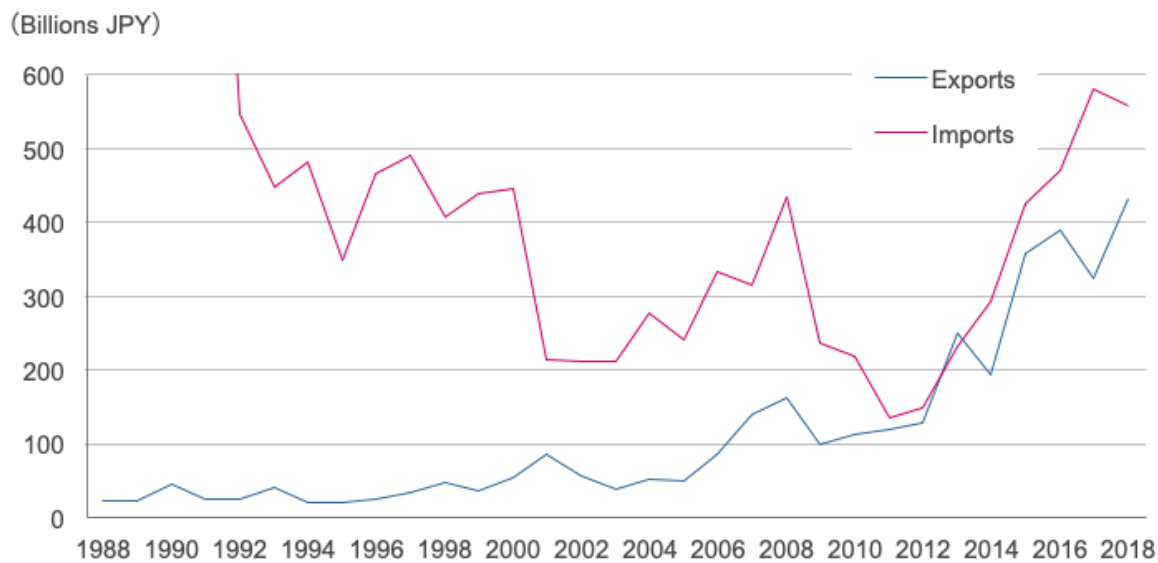
Chart 11: Changes in Artwork Imports and Exports



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

Chart 12: Changes in Artwork Imports and Exports (Enlarged)

¹¹ 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.

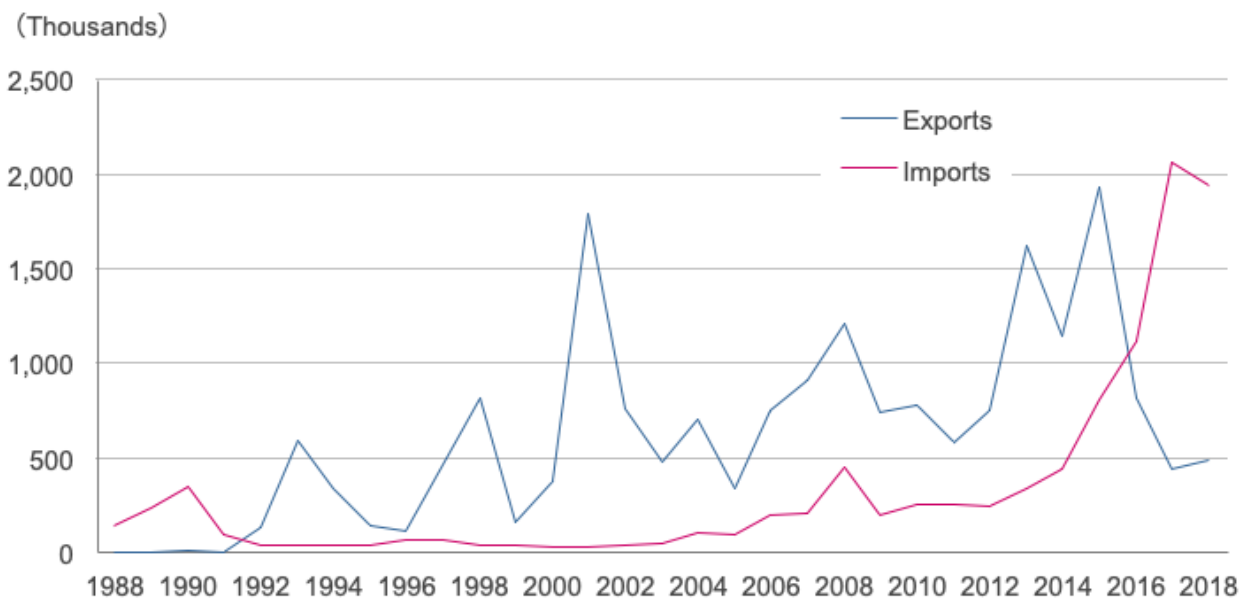


Source: Ministry of Finance trade statistics (adapted by Art Tokyo Association and Platform for Arts and Creativity)

y)

Chart 13 shows changes in the quantity and unit prices for calligraphy imports and exports since 1988.¹² They indicate a recent rise in the unit prices for imports.

Chart 13: 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)

¹² 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.

Chapter 4: Values Related to Art

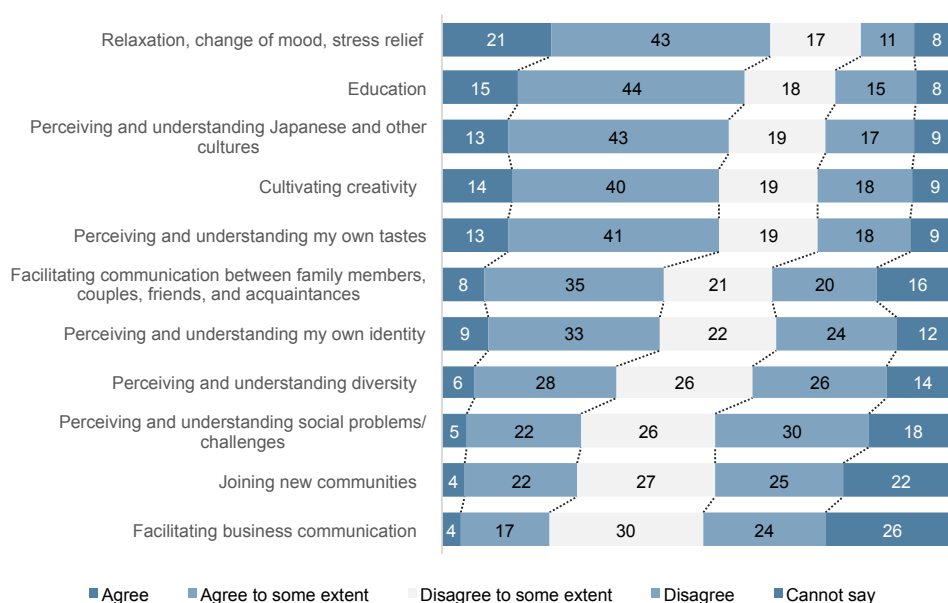
Attention is rising on the various ripple effects that art can have in terms of the relationship between business and art as well as art-focused tourism. The survey examined and analyzed people's opinions on the effects of viewing and buying art, and the differences between the two, as well as the importance of artistic perspectives for various things, which have featured in the results since the 2016 survey.

4-1: Effects of Viewing and Buying Art

Chart 14 shows the survey responses regarding the positive effects of viewing art. **High proportions of people answered “Relaxation, change of mood, stress relief” (64%) and “Education” (59%), while a majority also cited such effects as “Perceiving and understanding Japanese and other cultures,” “Cultivating creativity,” and “Perceiving and understanding my own tastes.”**¹³

Of particular relevance for business was that though a majority of people answered “Cultivating creativity” (54%), a higher proportion of people think that art has no effect on “Facilitating business communication” than those who think it does (only 21%).

Chart 14: Positive Effects of Viewing Art¹⁴



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

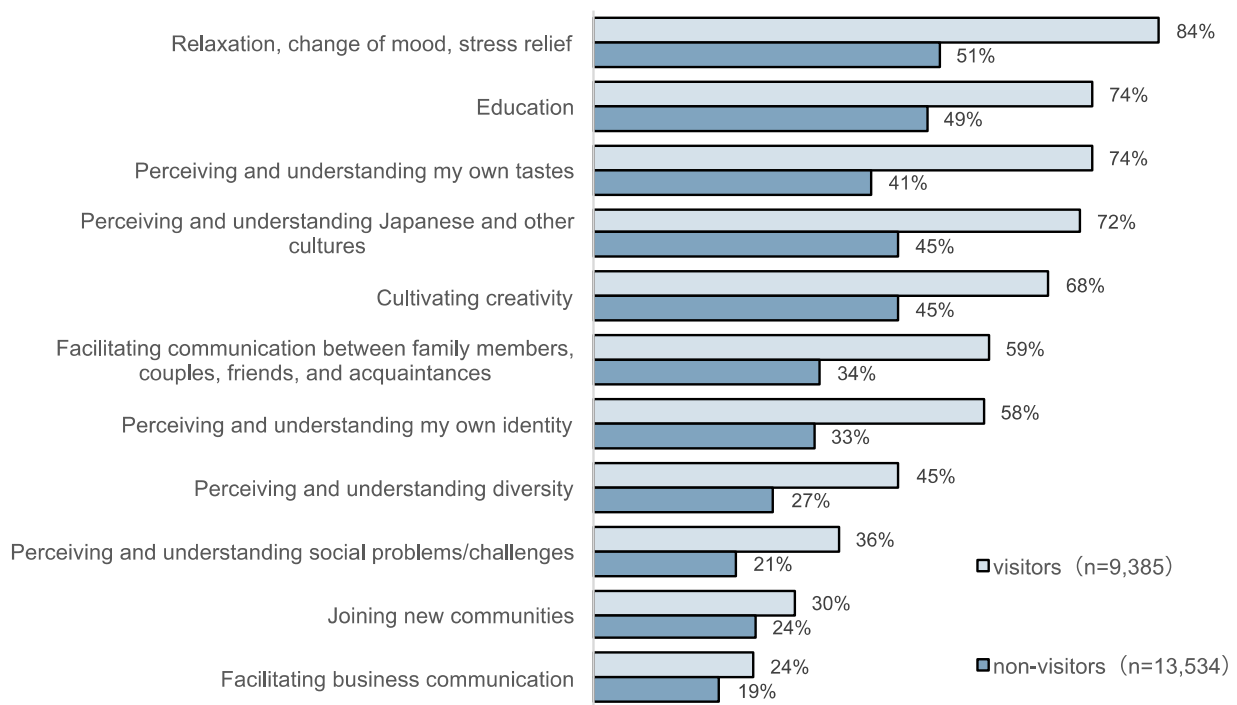
¹³ Values in parentheses indicate the total number of “Agree” and “Agree to some extent” responses combined.

¹⁴ The question asked was: “Do you think that people can receive the following positive effects from viewing works of art?”

Chart 15 shows these results in comparison with people who visited a museum or art museum at least once per year (herein, “visitors”) with people who do not visit museums (“non-visitors”). The frequency for visitors was approximately 38% of the overall.

Though visitors were proportionately higher overall, the two segments reveal very similar trends when compared. The results for “Perceiving and understanding my own tastes” and “Perceiving and understanding social problems/challenges” were notably higher for the visitors segment.

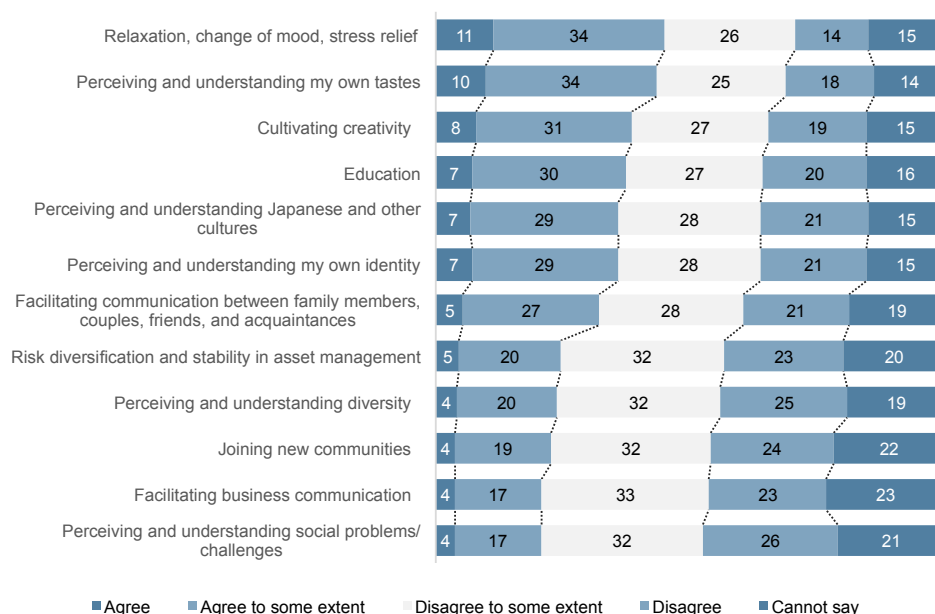
Chart 15: Positive Effects of Viewing Art (by Museum and Art Museum Visits)



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 16 shows the survey responses regarding the positive effects of buying works of art with the same possible answers. Chart 17 then shows a comparison of the responses regarding the positive effects of viewing with those of buying art. **Generally, the results for the positive effects of viewing art are higher, though comparing the trends between the two sets of responses reveals that “Perceiving and understanding my own tastes” and “Perceiving and understanding my own identity” are particularly regarded as positive effects of buying art.**

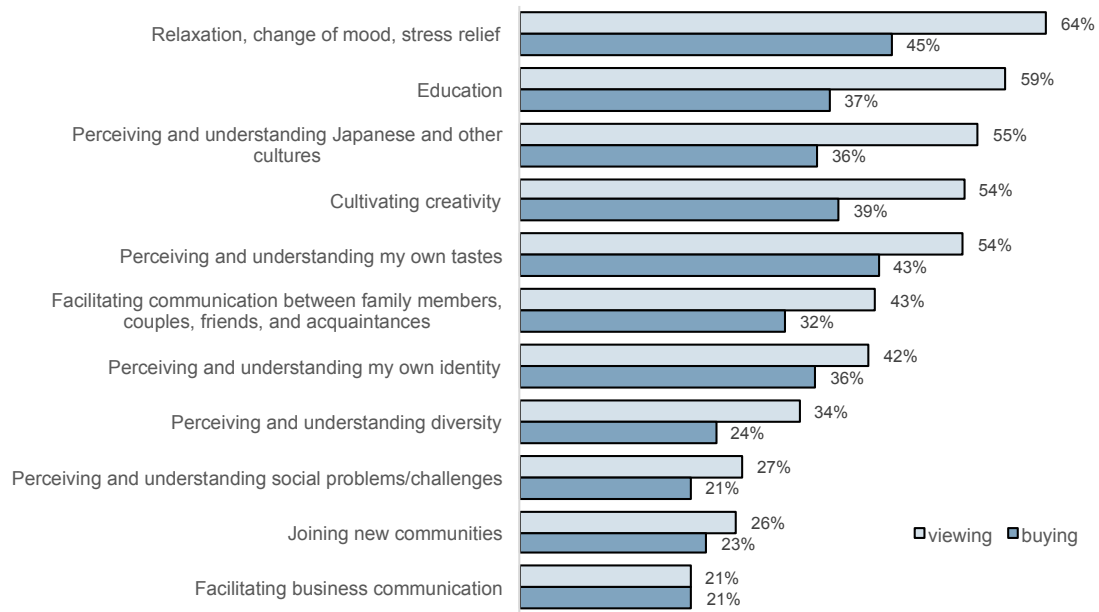
Chart 16: Positive Effects of Buying Art¹⁵



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁵ The question asked was: “Do you think that people can receive the following positive effects from buying works of art?”

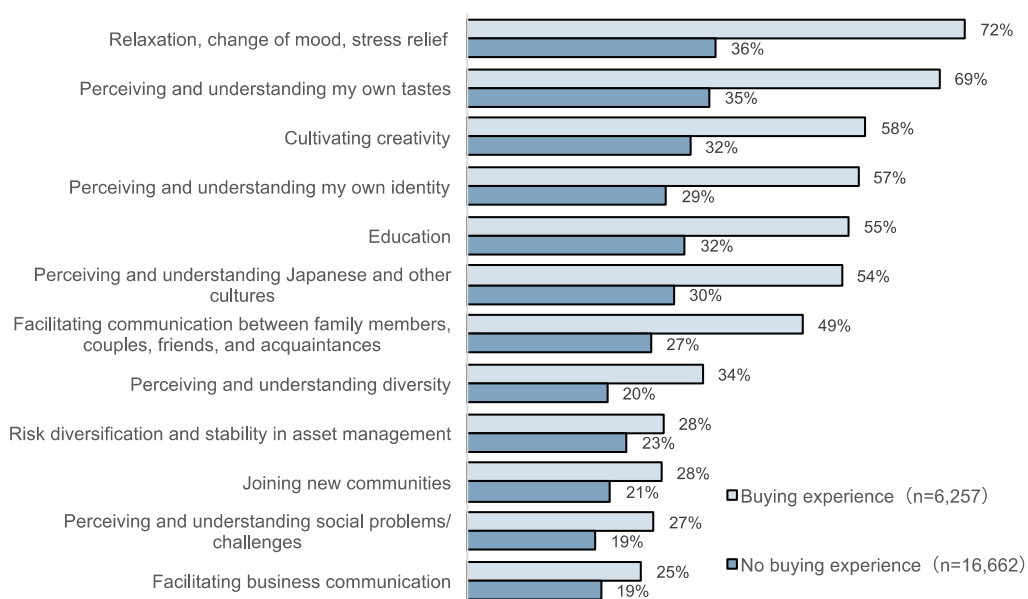
Chart 17: Comparison Between Positive Effects of Viewing and Buying Art



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 18 is a comparison of these results between respondents with and without past experience of buying works of art (respectively, the “buying experience” and “no buying experience” segments). The segment of those with buying experience comprised approximately 16% of the overall. Comparing the two segments revealed that the results for “Perceiving and understanding my own identity” were particularly high for the buying experience segment.

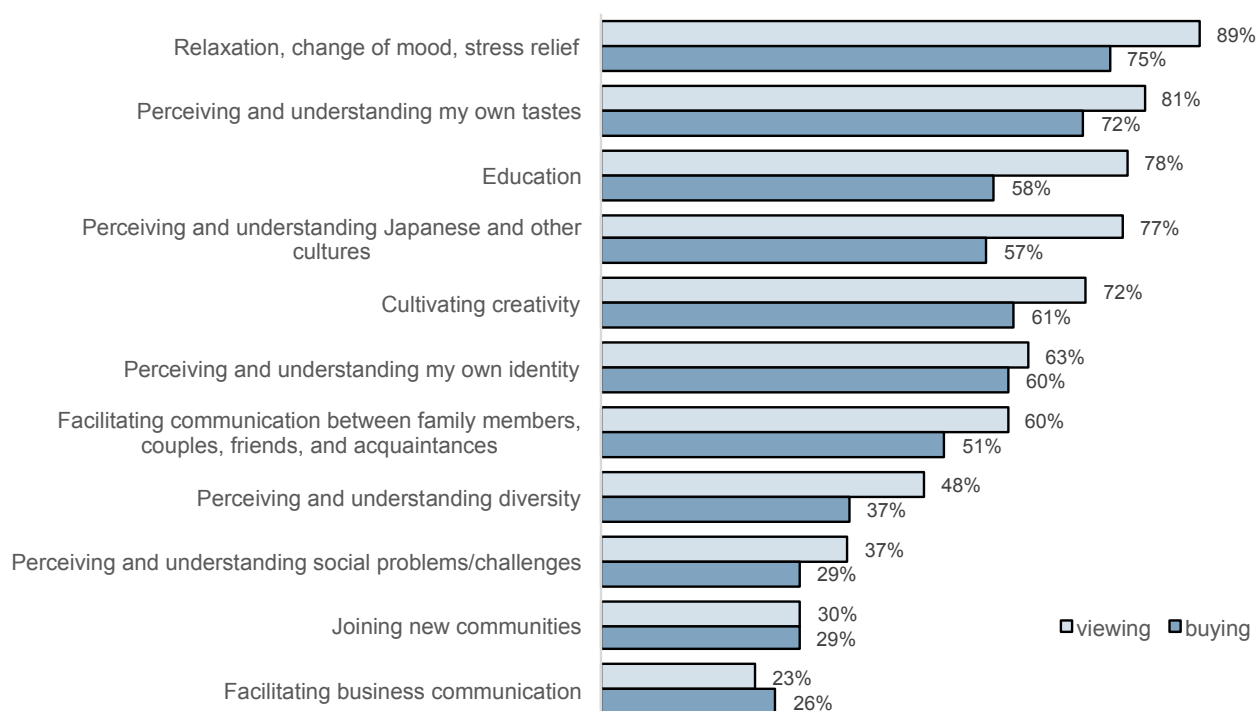
Chart 18: Positive Effects of Buying Art (Artwork Buying Experience)



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

As a further reference, Chart 19 shows the responses regarding the positive effects of viewing art by people who visited a museum or art museum at least once per year and also have experience of buying a work of art, in comparison with the responses regarding the positive effects of buying art. **Though it had a lower response overall, “Facilitating business communication” had a higher number of responses as a positive effect of buying art than viewing art, indicating that people with experience of buying artworks are especially aware of this effect.**

Chart 19: Comparison of Positive Effects of Viewing and Buying Art (Museum and Art Museum Visitors, Artwork Buying Experience)

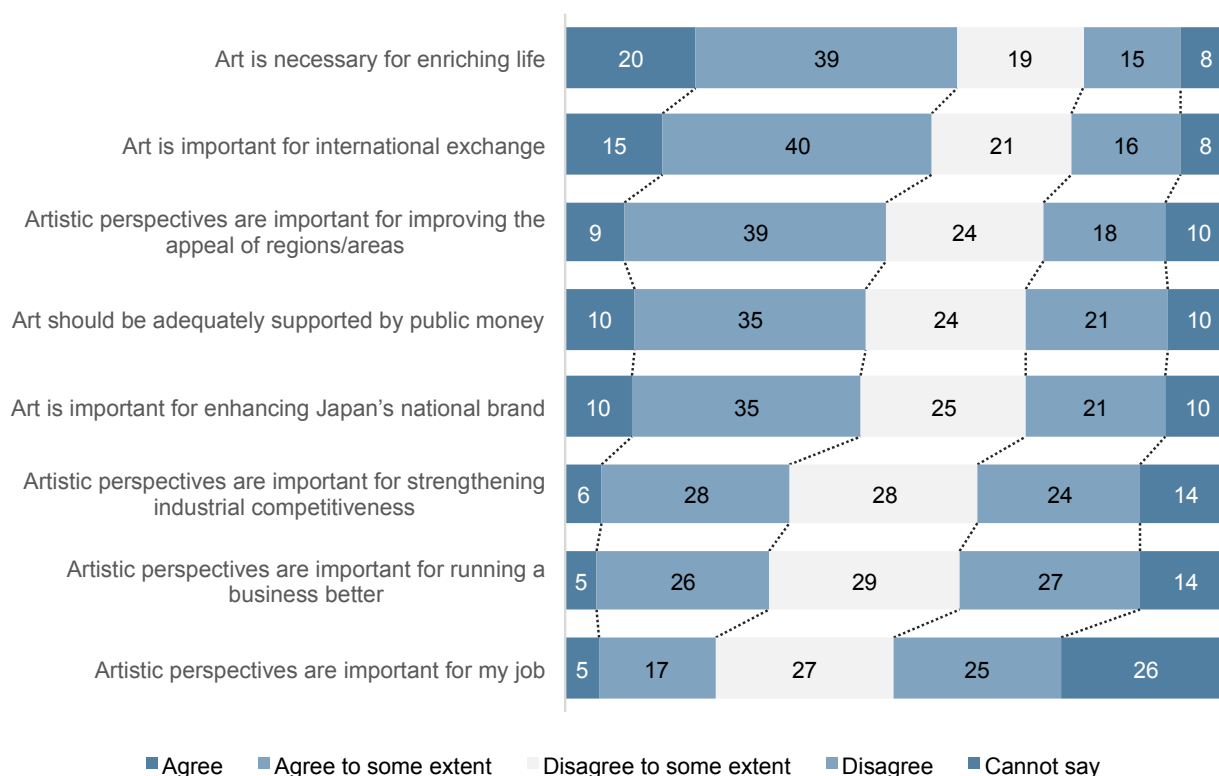


Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

4-2: Values Associated with Art

Respondents were surveyed regarding the various kinds of values they associate with art. The results are shown in Chart 20. **A majority of people agreed with the statements that “Art is necessary for enriching life” and “Art is important for international exchange.”¹⁶ Affirmative responses to “Artistic perspectives are important for improving the appeal of regions/areas,” “Art should be adequately supported by public money,” and “Art is important for enhancing Japan’s national brand” were higher than negative ones.¹⁷**

Chart 20: Values Associated with Art



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁶ Based on the total number of “Agree” and “Agree to some extent” responses combined.

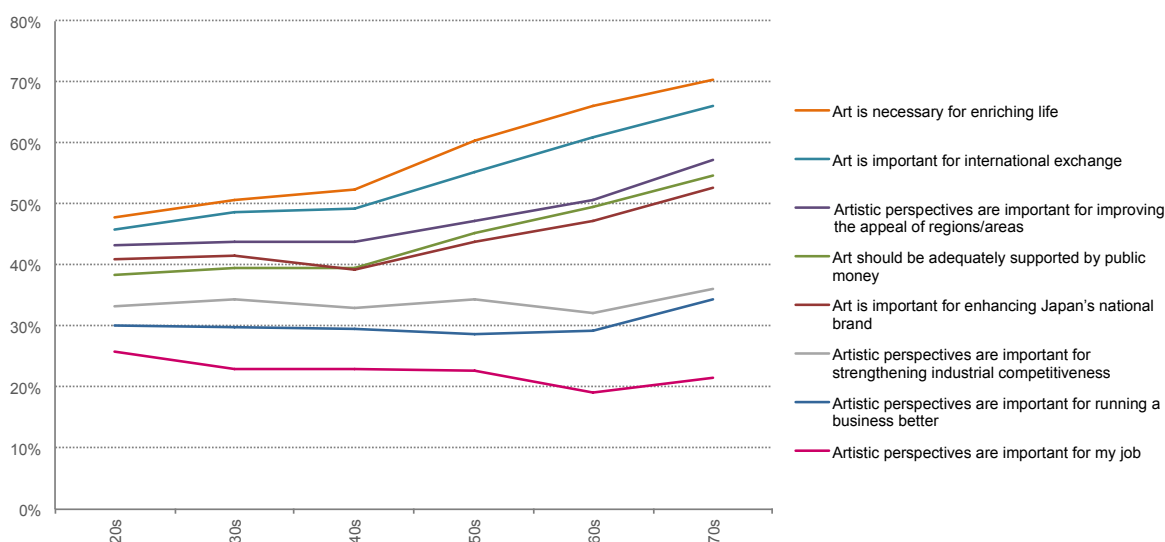
¹⁷ Based on a comparison between the total number of “Agree” and “Agree to some extent” responses combined and the total number of “Disagree to some extent” and “Disagree” responses combined.

Charts 21 through 23 show these results in terms of age, personal annual income, and occupation.¹⁸ For many of the statements, not least “Art is necessary for enriching life,” the response rate increases with age, though younger respondents showed a higher tendency to answer affirmatively for “Artistic perspectives are important for my job.”

A relationship with personal annual income is not particularly clear from any of the responses. A correlation can, however, be discerned between those with annual incomes of 2 million JPY and over and “Artistic perspectives are important for my job.” Accordingly, the response for this statement was high among respondents whose occupations fell into the “product planning and development” category, and also high for the “senior manager or executive” and “solo proprietor or store owner” categories.

From this, we can presume a tendency for younger generations, high income earners, and senior managers to believe in a link between artistic perspectives and their jobs.

Chart 21: Values Associated with Art (by Age)¹⁹

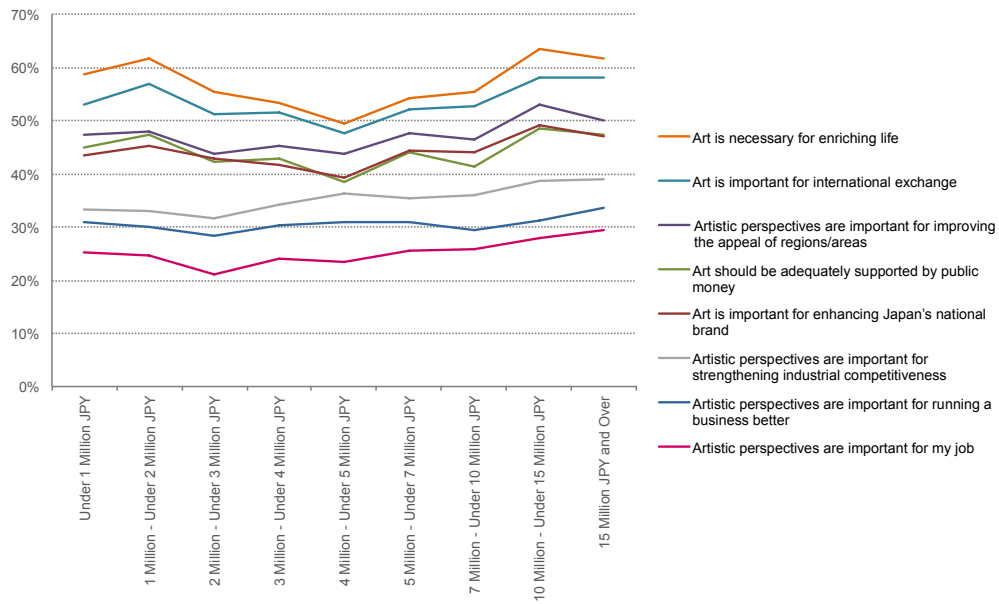


Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

¹⁸ The displayed results are the total numbers of “Agree” and “Agree to some extent” responses combined.

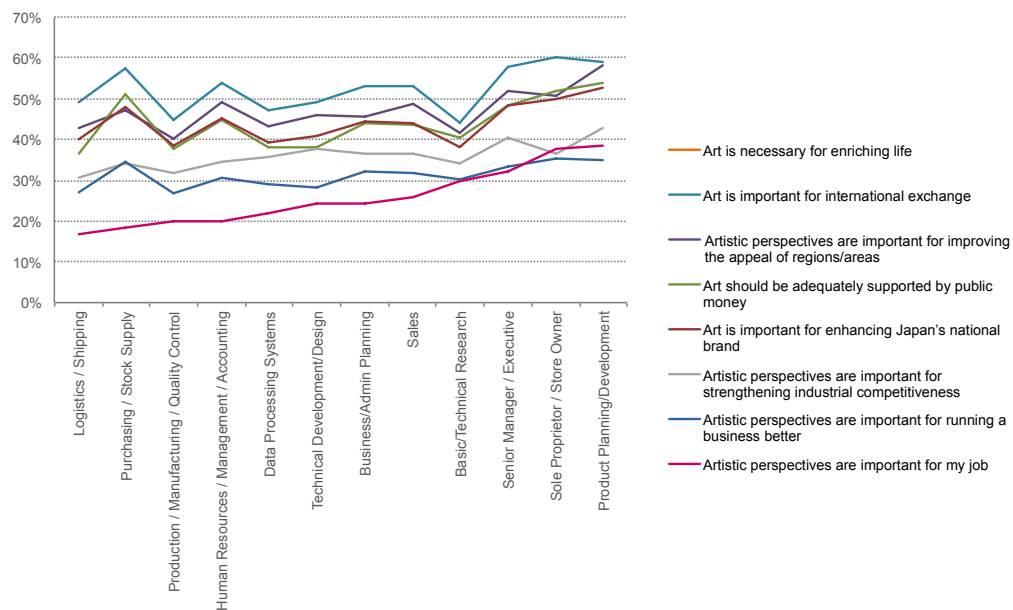
¹⁹ The following samples were collected by age group: twenties: 3,074; thirties: 3,542; forties: 4,379; fifties: 4,497; sixties: 5,759; seventies: 2,746.

Chart 22: Values Associated with Art (by Personal Annual Income)²⁰



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 23: Values Associated with Art (by Occupation)^{21 22}



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

²⁰ The following samples were collected per income bracket: less than 1 million JPY: 2,049; less than 2 million JPY: 2,152; less than 3 million JPY: 1,917; less than 4 million JPY: 1,681; less than 5 million JPY: 1,291; less than 7 million JPY: 1,469; less than 10 million JPY: 1,627; less than 15 million JPY: 1,406; more than 15 million JPY: 1,001.

²¹The following samples were collected per occupation category: Logistics / Shipping: 358 Purchasing / Stock Supply: 151; Production / Manufacturing / Quality Control: 1,149; Human Resources / Management / Accounting: 1,664; Data Processing Systems: 632; Technical Development/Design: 679; Business/Admin Planning: 637; Sales: 2,131; Basic/Technical Research: 256; Senior Manager / Executive: 719; Sole Proprietor / Store Owner: 1,169; Product Planning/Development: 233.

²² No results are shown for occupation categories where fewer than 100 samples were collected (Survey / Advertising / Publicity; PR / Editing).

Chapter 5: The Art Industry by Region

The survey has until now focused on the state of the art industry across the whole of Japan. This year, however, it surveyed and analyzed purchases of art and values associated with art by region in order to shine light on the characteristics of each region. The following results examine the respective concerns and relations for each.

5-1: Art Purchases by Region²³

Charts 24 and 25 show people's experience of buying art by region. When examined by area, Tokyo and Kinki (excluding Osaka) had high frequencies of art buying experience. When examined by major city, Tokyo (23 wards), Fukuoka, and Kobe had high results.

Chart 24: Art Buying Experience (Left: by Area; Right: by Major City)









































Region	Sample No.	Buying Experience Rate	Municipality	Sample No.	Buying Experience Rate
Hokkaido/Tohoku	2,069	 22%	Tokyo (23 wards)	2,873	 28%
Tokyo	4,011	 26%	Osaka	652	 25%
Kanto (excl. Tokyo)	5,932	 24%	Nagoya	652	 24%
Chubu	3,537	 24%	Sapporo	528	 25%
Osaka	1,742	 24%	Fukuoka	322	 32%
Kinki (excl. Osaka)	2,563	 27%	Kobe	369	 31%
Chugoku/Shikoku	1,516	 24%	Kawasaki	424	 22%
Kyushu/Okinawa	1,549	 25%	Another government-designated municipality	3,626	 24%
			Another city, town, or village	13,473	 24%

Chart 25: Art Buying Experience (by Prefecture)²⁴

Prefectures	Sample No.	Buying Experience Rate	Prefectures	Sample No.	Buying Experience Rate
Hokkaido	983	 24%	Gifu	335	 28%
Miyagi	349	 20%	Shizuoka	528	 22%
Fukushima	208	 24%	Aichi	1,594	 24%
Ibaraki	381	 27%	Mie	334	 29%
Tochigi	256	 23%	Kyoto	493	 27%
Gunma	209	 28%	Osaka	1,742	 24%
Saitama	1,429	 21%	Hyogo	1,158	 25%
Chiba	1,324	 23%	Nara	272	 30%
Tokyo	4,011	 26%	Okayama	293	 25%
Kanagawa	2,333	 25%	Hiroshima	408	 24%
Niigata	310	 22%	Fukuoka	718	 30%
Nagano	290	 28%			

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

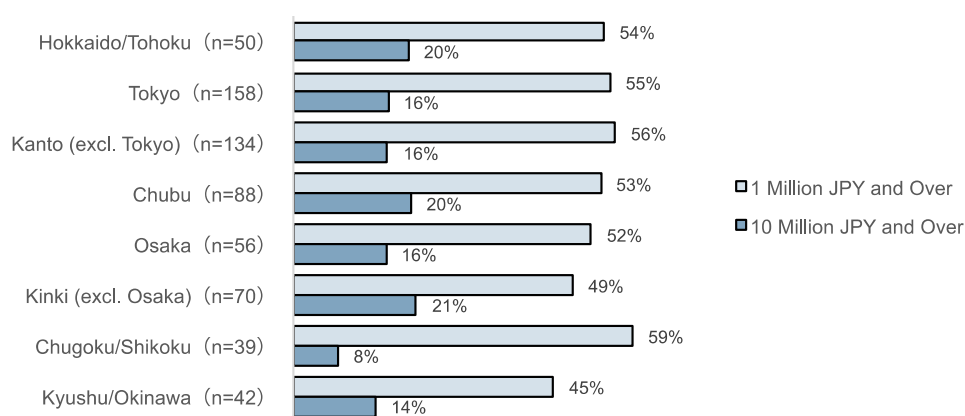
²³ Charts 24 and 25 are based on data from the first survey. Charts 26 to 31 are based on data from the second survey.

²⁴ Results are shown only for prefectures where 200 or more samples were collected.

Chart 26 shows the results by region when respondents were surveyed on their art holdings. The Chugoku-Shikoku region had the highest rate of possessing art worth 1 million JPY or more, while Kinki (excluding Osaka) had the highest results for art holdings of 10 million JPY or more.

The survey also collected data on where people are buying art, as shown in Chart 27. In general, people bought art in the prefecture where they live, though people residing in the Kanto region in places excluding Tokyo were often buying art in Tokyo, while residents of the Kinki region other than Osaka were also frequently buying art in Osaka or in other prefectures (not Tokyo or Osaka). Even people living in Hokkaido and Tohoku in the far north of Japan were often buying art in Tokyo.

Chart 26: Amount of Art Holdings²⁵



Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 27: Location of Artwork Purchase (If Purchased Within 3 Years)²⁶

Place of Residence \ Location of Purchase	Tokyo Metropolis	Osaka Prefecture	Prefecture Where You Live	Another Prefecture (excl. Tokyo, Osaka)
Hokkaido/Tohoku	34%	10%	54%	26%
Tokyo	—	12%	75%	23%
Kanto (excl. Tokyo)	57%	14%	42%	31%
Chubu	41%	22%	58%	28%
Osaka	27%	—	75%	29%
Kinki (excl. Osaka)	21%	36%	56%	40%
Chugoku/Shikoku	21%	15%	69%	26%
Kyushu/Okinawa	21%	14%	64%	17%

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

²⁵ The question asked was: “Which of the following types of assets do you own? Please choose only the most applicable answer.” To which, the types of assets were as follows: “Savings”; “Bonds, shares, trusts, or savings insurance”; “Real estate (as an investment)”; “Real estate (other use)”; “Art.” For each type, respondents chose between the following: “None”; “between 10,000 JPY and 1 million JPY”; “less than 5 million JPY”; “less than 10 million JPY”; “less than 50 million JPY”; “less than 100 million JPY”; “less than 300 million JPY”; “more than 300 million JPY”; “Do not know.”

²⁶ The question asked was: “Where do you buy art? Please choose only the most applicable answer.” And then for each of the possible answers (“Tokyo Metropolis”; “Osaka Prefecture”; “Prefecture where you live”; “Another prefecture (excl. Tokyo, Osaka)”), respondents chose “Never bought art there,” “Bought art there in past three years,” or “Have not bought any art in the past three years but have previously bought art there.”

5-2: Values Associated with Buying Art by Region

Chart 28 compares the aims of buying art by region. In many regions, the aim was frequently to decorate a home, store, or office. When comparing the regions, however, a relatively large number of people in Hokkaido-Tohoku and Kinki (excluding Osaka) answered that they bought an artwork because they liked and purchased it impulsively.

In terms of the information that is valued for buying art, as shown in Chart 29, respondents in Osaka and other parts of West Japan valued information from galleries and art dealers as well as department store staff. As a reference, Chart 30 shows what respondents said they were worried about when buying or possessing art.

In terms of the intention to buy art by region, as shown in Chart 31, Tokyo and Chugoku-Shikoku were comparatively high.

Chart 28: Aim of Buying Art²⁷

※Light blue: Results for less than 10 samples ※Red: #1 (top) result by region, Blue: #2, Green: #3	Hokkaido/ Tohoku	Tokyo	Kanto (excl. Tokyo)	Chubu	Osaka	Kinki (excl. Osaka)	Chugoku/ Shikoku	Kyushu/ Okinawa
Decorate a home/store/office	22%	45%	43%	36%	48%	40%	38%	48%
Collecting	26%	41%	35%	28%	45%	37%	33%	29%
Impulse purchase because I liked it	32%	40%	37%	31%	43%	43%	38%	29%
Commemorate something	16%	28%	27%	22%	30%	26%	36%	26%
Deepen my knowledge about art	30%	25%	33%	25%	38%	36%	31%	31%
Support the artist	16%	22%	19%	19%	21%	26%	15%	14%
Use as something practical	24%	15%	13%	14%	16%	24%	18%	17%
Connection with the artist	6%	13%	11%	8%	11%	13%	8%	2%
Investment	14%	10%	7%	8%	14%	10%	10%	21%
Gift	10%	9%	9%	9%	14%	11%	18%	14%
Educate children or employees	6%	6%	1%	1%	4%	3%	3%	5%
Out of a sense of duty	2%	4%	6%	6%	4%	6%	15%	2%
Tax purposes	10%	4%	4%	8%	5%	3%	5%	7%
Other	2%	2%	3%	1%	0%	0%	0%	0%
No particular aim or reason	8%	3%	4%	2%	0%	1%	3%	5%

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 29: Information Valued for Buying Art²⁸

※Light blue: Results for less than 10 samples ※Red: #1 (top) result by region, Blue: #2, Green: #3	Hokkaido/ Tohoku	Tokyo	Kanto (excl. Tokyo)	Chubu	Osaka	Kinki (excl. Osaka)	Chugoku/ Shikoku	Kyushu/ Okinawa
Gallery or dealer staff (excl. department store)	42%	35%	37%	33%	36%	33%	33%	31%
Art specialists (curators, critics, etc.)	18%	26%	25%	20%	20%	24%	18%	17%
Online resources (excl. social media)	36%	24%	27%	18%	23%	24%	26%	19%
Magazines/Books	24%	22%	28%	11%	20%	24%	26%	19%
Friends/Aquaintances knowledgeable about art	22%	21%	32%	20%	25%	30%	31%	21%
Artists	32%	19%	24%	15%	9%	17%	10%	24%
Department store staff	20%	18%	19%	19%	38%	27%	31%	12%
Family relatives knowledgeable about art	20%	16%	19%	9%	14%	16%	21%	12%
Social media (Instagram, Facebook, Twitter, etc.)	20%	11%	10%	15%	7%	14%	13%	14%
Television	14%	9%	12%	7%	9%	4%	8%	2%
Other	0%	1%	3%	1%	2%	0%	0%	2%
Nothing	10%	21%	11%	15%	16%	17%	8%	24%
Cannot decide / Do not know	6%	4%	4%	5%	4%	1%	3%	10%

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

²⁷ The question asked was: "What is your aim or reason for buying art? Please choose all that apply."

²⁸ The question asked was: "When buying art, which of the following types of information do you value? Please choose all that apply."

Chart 30: Concerns About Buying/Possessing Art²⁹

※Light blue: Results for less than 10 samples ※Red: #1 (top) result by region, Blue: #2, Green: #3	Hokkaido/ Tohoku	Tokyo	Kanto (excl. Tokyo)	Chubu	Osaka	Kinki (excl. Osaka)	Chugoku/ Shikoku	Kyushu/ Okinawa
Deterioration of the artwork	46%	48%	40%	28%	43%	43%	41%	33%
Place to exhibit/store the artwork	24%	34%	37%	22%	41%	27%	36%	26%
Procedures after I die	32%	22%	24%	19%	20%	16%	23%	12%
Understanding of my family	14%	17%	16%	10%	9%	17%	15%	12%
Security improvements for where the artwork is	22%	16%	12%	6%	16%	16%	10%	12%
Procedures for how to relinquish ownership of the	12%	15%	18%	15%	16%	16%	10%	10%
How it appears to others (envy, misunderstanding)	8%	11%	7%	7%	7%	7%	3%	7%
Depreciation in value	10%	9%	10%	11%	9%	11%	10%	10%
Other	0%	1%	1%	0%	0%	1%	0%	0%
Don't worry	18%	20%	19%	33%	23%	24%	21%	33%
No worries/concerns	4%	3%	3%	6%	5%	6%	8%	2%

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Chart 31: Intention to Buy Art³⁰

※Light blue: Results for less than 10 samples	Hokkaido/ Tohoku	Tokyo	Kanto (excl. Tokyo)	Chubu	Osaka	Kinki (excl. Osaka)	Chugoku/ Shikoku	Kyushu/ Okinawa
Yes	36%	41%	31%	35%	41%	31%	31%	38%
Maybe	36%	42%	46%	40%	39%	43%	51%	40%
Unlikely	16%	5%	10%	8%	5%	13%	13%	10%
No	4%	3%	2%	6%	0%	1%	0%	2%
No worries/concerns	8%	9%	10%	11%	14%	11%	5%	10%
Reference: "Yes" + "Maybe"	72%	83%	77%	75%	80%	74%	82%	79%

Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

²⁹ The question asked was: "What are you worried about in terms of buying or possessing art? Please choose all that apply."

³⁰ The question asked was: "Do you think you will buy art in the future?"

Chapter 6: Actively Bought and Sold Artists

The third and final special part of this survey report provides the following three rankings of the top 10 artists from 2015 to 2019: Japanese artists with the highest total auction sales at auctions in Japan; Japanese artists with the highest total auction sales at auctions overseas; and non-Japanese artists with the highest total auction sales at auctions in Japan. The analysis is based on data provided by Artprice.

Chart 32: Top 10 artists in 2019

Top 10 Japanese artists inside Japan by auction turnover in 2019

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	Yayoi KUSAMA (1929-)	Japan	\$13,734,593	272	\$1,265,829	\$50,495
2	Tsuguharu FOUJITA (1886-1968)	Japan	\$3,839,496	163	\$486,680	\$23,555
3	Yoshitomo NARA (1959-)	Japan	\$3,729,307	140	\$440,882	\$26,638
4	Ayako ROKKAKU (1982-)	Japan	\$2,527,504	53	\$174,570	\$47,689
5	Shiko MUNAKATA (1903-1975)	Japan	\$2,238,990	194	\$387,584	\$11,541
6	Kaii HIGASHIYAMA (1908-1999)	Japan	\$1,736,577	84	\$473,006	\$20,674
7	Tomoo GOKITA (1969-)	Japan	\$1,699,165	45	\$306,687	\$37,759
8	Takashi MURAKAMI (1962-)	Japan	\$1,261,544	337	\$101,720	\$3,743
9	Yasuo KAZUKI (1911-1974)	Japan	\$1,048,373	54	\$96,501	\$19,414
10	Ikuo HIRAYAMA (1930-2009)	Japan	\$1,011,613	70	\$200,769	\$14,452

Top 10 Japanese artists outside Japan by auction turnover in 2019

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	Yoshitomo NARA (1959-)	Japan	\$96,752,404	251	\$24,949,674	\$385,468
2	Yayoi KUSAMA (1929-)	Japan	\$84,266,542	437	\$7,953,215	\$192,830
3	Kazuo SHIRAGA (1924-2008)	Japan	\$26,583,235	24	\$8,638,168	\$1,107,635
4	Tsuguharu FOUJITA (1886-1968)	Japan	\$22,099,020	303	\$2,697,461	\$72,934
5	Takashi MURAKAMI (1962-)	Japan	\$19,726,327	355	\$3,080,000	\$55,567
6	Tomoo GOKITA (1969-)	Japan	\$7,405,145	41	\$1,076,000	\$180,613
7	HOKUSAI (1760-1849)	Japan	\$3,769,084	137	\$507,000	\$27,512
8	Hiroshi SUGIMOTO (1948-)	Japan	\$2,567,371	71	\$400,000	\$36,160
9	Ayako ROKKAKU (1982-)	Japan	\$1,830,744	32	\$188,686	\$57,211
10	On KAWARA (1932-2014)	Japan	\$1,473,576	12	\$836,000	\$122,798

Top 10 foreign artists in Japan by auction turnover in 2019

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	KAWS (1974-)	United State	\$3,231,639	153	\$666,250	\$21,122
2	Bernard BUFFET (1928-1999)	France	\$2,794,046	370	\$474,955	\$7,551
3	Andy WARHOL (1928-1987)	United State	\$2,287,253	70	\$354,787	\$32,675
4	Maurice UTRILLO (1883-1955)	France	\$2,015,379	22	\$248,984	\$91,608
5	Pierre-Auguste RENOIR (1841-1919)	France	\$1,668,259	14	\$902,917	\$119,161
6	Ufan LEE (1936-)	South Korea	\$1,651,978	64	\$341,994	\$25,812
7	Pablo PICASSO (1881-1973)	Spain	\$1,353,400	127	\$144,049	\$10,657
8	Fernand LÉGER (1881-1955)	France	\$993,373	6	\$558,980	\$165,562
9	Marc CHAGALL (1887-1985)	Belarus	\$844,968	79	\$265,564	\$10,696
10	Georges ROUAULT (1871-1958)	France	\$822,579	34	\$430,268	\$24,194

Source: Art Tokyo Association, Platform for Arts and Creativity (based on data from Artprice)

Chart 33: Top 10 artists in 2015

Top 10 Japanese artists inside Japan by auction turnover in 2015

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	Kazuo SHIRAGA (1924-2008)	Japan	\$4,170,807	66	\$1,507,995	\$63,194
2	Yayoi KUSAMA (1929-)	Japan	\$3,860,656	221	\$242,503	\$17,469
3	Toshimitsu IMAI (1928-2002)	Japan	\$2,388,388	75	\$284,752	\$31,845
4	Sadamasa MOTONAGA (1922-2011)	Japan	\$2,093,712	134	\$199,721	\$15,625
5	Atsuko TANAKA (1932-2005)	Japan	\$1,578,984	14	\$1,075,811	\$112,785
6	Jiro YOSHIHARA (1905-1972)	Japan	\$1,519,442	32	\$612,069	\$47,483
7	Tsuguharu FOUJITA (1886-1968)	Japan	\$1,297,664	196	\$93,528	\$6,621
8	Kaii HIGASHIYAMA (1908-1999)	Japan	\$1,264,651	120	\$272,126	\$10,539
9	Shiko MUNAKATA (1903-1975)	Japan	\$1,166,915	93	\$180,165	\$12,547
10	Matazo KAYAMA (1927-2004)	Japan	\$1,084,774	88	\$391,152	\$12,327

Top 10 Japanese artists outside Japan by auction turnover in 2015

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	Yayoi KUSAMA (1929-)	Japan	\$53,908,715	258	\$7,033,080	\$208,949
2	Yoshitomo NARA (1959-)	Japan	\$28,407,958	138	\$3,413,000	\$205,855
3	Kazuo SHIRAGA (1924-2008)	Japan	\$24,037,199	35	\$3,106,320	\$686,777
4	Takashi MURAKAMI (1962-)	Japan	\$10,633,707	223	\$1,785,360	\$47,685
5	Atsuko TANAKA (1932-2005)	Japan	\$5,328,450	13	\$1,057,800	\$409,881
6	Tsuguharu FOUJITA (1886-1968)	Japan	\$5,113,865	243	\$546,960	\$21,045
7	On KAWARA (1932-2014)	Japan	\$5,023,496	20	\$1,205,000	\$251,175
8	Jiro YOSHIHARA (1905-1972)	Japan	\$4,361,480	29	\$629,520	\$150,396
9	Shozo SHIMAMOTO (1928-2013)	Japan	\$3,343,447	32	\$784,320	\$104,483
10	Hiroshi SUGIMOTO (1948-)	Japan	\$2,017,487	67	\$389,000	\$30,112

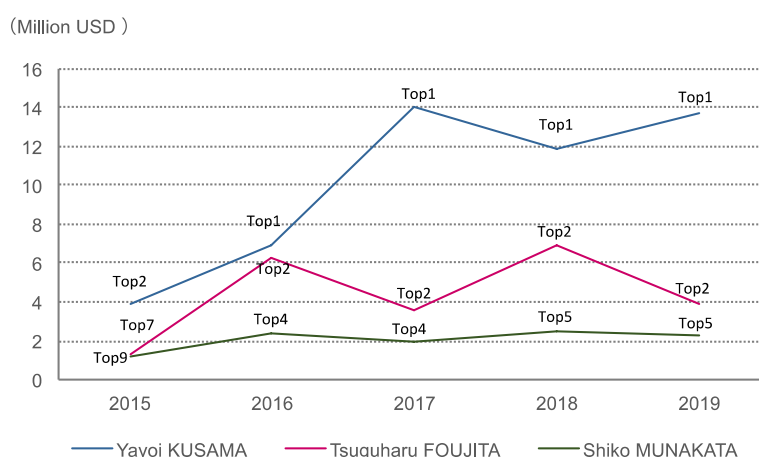
Top 10 foreign artists in Japan by auction turnover in 2015

	Artist	Nationality	Turnover	Sold lots	Highest result	Average
1	Bernard BUFFET (1928-1999)	France	\$3,189,897	188	\$483,720	\$16,968
2	Pierre-Auguste RENOIR (1841-1919)	France	\$2,261,324	8	\$2,104,394	\$282,666
3	Pablo PICASSO (1881-1973)	Spain	\$1,166,933	120	\$130,676	\$9,724
4	DAUM FRÈRES (1878-?)	France	\$1,163,106	251	\$79,996	\$4,634
5	Marc CHAGALL (1887-1985)	Belarus	\$1,112,899	128	\$272,126	\$8,695
6	Andy WARHOL (1928-1987)	United State	\$1,065,917	47	\$483,575	\$22,679
7	Ufan LEE (1936-)	South Korea	\$793,307	59	\$180,165	\$13,446
8	Sang-Hwa CHUNG (1932-)	South Korea	\$702,044	9	\$139,674	\$78,005
9	Auguste RODIN (1840-1917)	France	\$666,301	5	\$644,892	\$133,260
10	André BRASILLIER (1929-)	France	\$602,086	84	\$46,300	\$7,168

Source: Art Tokyo Association, Platform for Arts and Creativity (based on data from Artprice)

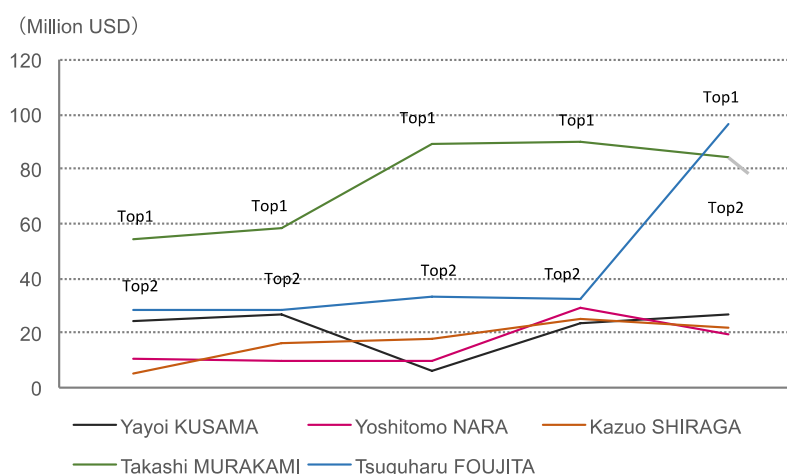
When we view the data from 2015 to 2019, Yayoi Kusama, Tsuguharu Foujita (Léonard Foujita), and Shiko Munakata appear in the top 10 for Japanese auctions each year. (Matazo Kayama and Kaii Higashiyama also appear four times in the five-year period.) In particular, as shown in Chart 34, the top-ranked artist is Yayoi Kusama from 2016 to 2019, followed by Tsuguharu Foujita, demonstrating the well-established popularity of both artists. In terms of sales for Japanese artists at auctions overseas, Yayoi Kusama, Yoshitomo Nara, Kazuo Shiraga, Takashi Murakami, and Tsuguharu Foujita appear in the top 10 each year.³¹

Chart 34: Auction Sales for Japanese Artists at Auctions in Japan
Top 10 artists for entire 2015–2019 period



Source: Art Tokyo Association, Platform for Arts and Creativity (based on data from Artprice)

Chart 35: Auction Sales for Japanese Artists at Auctions Overseas
Top 10 artists for entire 2015–2019 period



Source: Art Tokyo Association, Platform for Arts and Creativity (based on data from Artprice)

³¹ Atsuko Tanaka, Hiroshi Sugimoto, and On Kawara also appear four times in the top 10 over the five years.

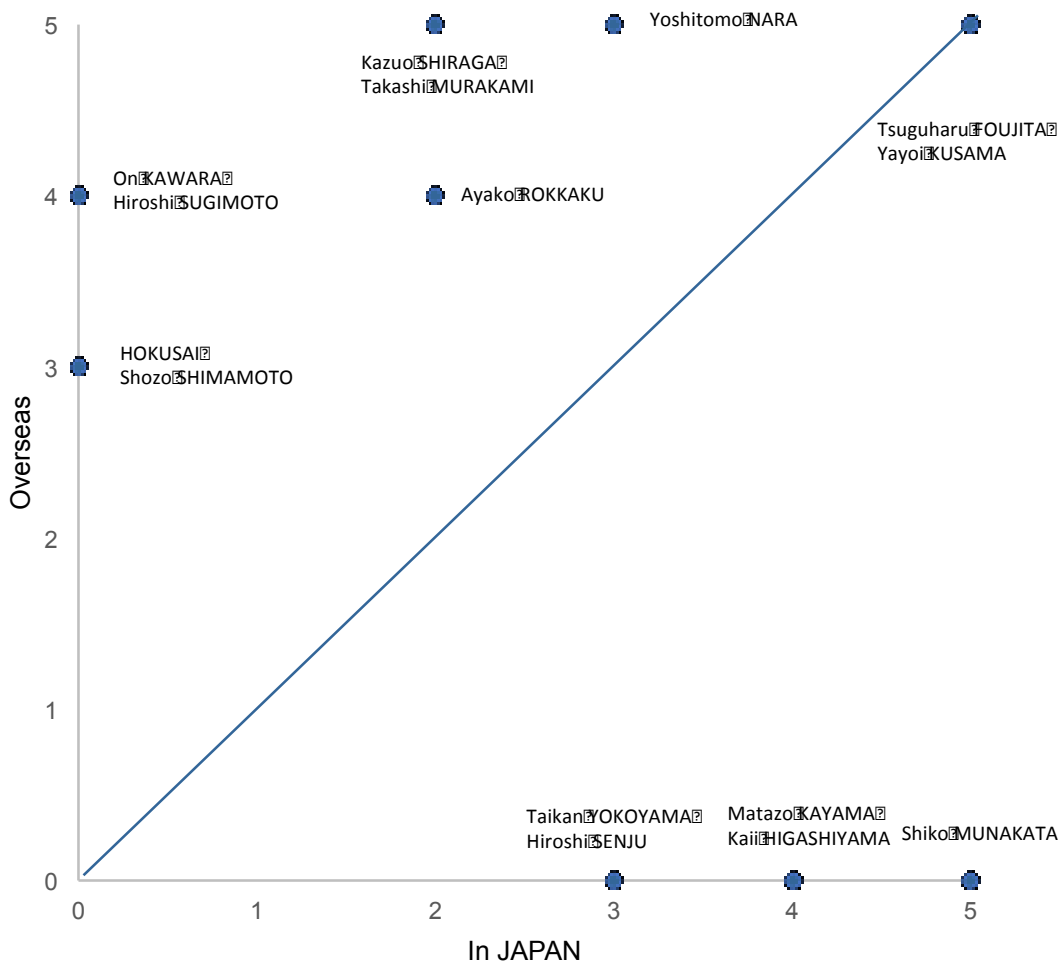
Chart 36 arranges the auction appearance frequencies of artists who appeared three times or more in the top 10 for either auctions in Japan or auctions overseas between 2015 and 2019.

With the highest numbers of appearances in both types of auction, Tsuguharu Foujita, Yayoi Kusama, and Yoshitomo Nara can be regarded as popular artists at home and abroad.

The results also reveal that certain artists (Shiko Munakata, Matazo Kayama, Kaii Higashiyama, Yokoyama Taikan, and Hiroshi Senju) are popular domestically, while others (On Kawara, Hiroshi Sugimoto, Katsushika Hokusai, and Shozo Shimamoto) enjoy high popularity internationally.

The artists with the highest number of appearances in the top 10 for auctions in Japan (appearing in all years from 2015 to 2019) were: Bernard Buffet, Pablo Picasso, Marc Chagall, Andy Warhol, and Lee Ufan.

Chart 36: Frequency of Main Artists in Japanese and Overseas Auctions Top 10 (2015–2019)



Source: Art Tokyo Association, Platform for Arts and Creativity (based on data from Artprice)

Closing Remarks

First conducted in 2016, this survey has now been carried out four times. The scale of the art market is the largest yet. Alongside the potential for the art industry, not least in terms of the market for art-related products, the relationship between art and business has attracted unprecedented levels of attention. For these discussions, however, we still do not have adequate quantitative data, which we hope this survey will play a role in supplying. Together with fixed-point analysis of the market scale of the art industry, the survey will next year and beyond continue to provide a range of information with the goal of facilitating a society where art, people, and industries are closely interrelated.

Use of This Report

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Organizer: Agency for Cultural Affairs / Art Tokyo Association (Representative: Naohiko Kishi)

Planning and Survey: Art Tokyo Association

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)、

Hiroshi Shimaoka (planning, survey design, editing)

Platform for Arts and Creativity

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