

Japanese Art Industry Market Research Survey 2019
Japanese Art Market Estimated at 258 billion yen,
up 4.9% on Last Year
Respondents Surveyed on Values Associated with Buying and Viewing Art

Art Tokyo Association, the organizer of Art Fair Tokyo, Japan’s largest art fair, conducted the Japanese Art Industry Market Research Survey with approximately 20,000 people, estimating the scale of the art market in Japan to be 258 billion JPY.

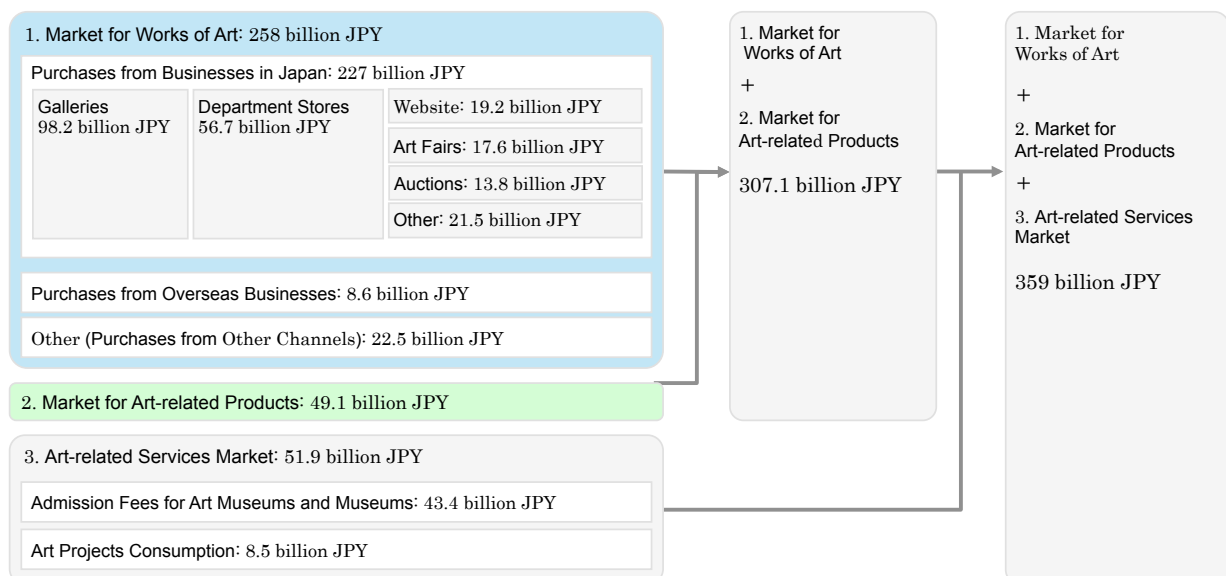
This year’s growth of 4.9% is the largest since the survey began in 2016. (In 2016, the market was estimated at 243.1 billion yen; in 2017, it was estimated at 243.7 billion yen.; in 2018, it was estimated at 246 billion yen.) When the art market is viewed by sales channel, the two highest channels remain galleries in Japan (98.2 billion yen) and department stores (56.7 billion yen).

Art Tokyo Association has collated these results from the survey into the Japanese Art Industry Market Research Report 2019, which is published online in March 2020.

Scale of Markets for Works of Art, Art-related Products, and Art-Related Services

The scale of the market is estimated at 258 billion JPY in terms of sales of works of art (1) such as antiques, *yōga* (Western-style painting), sculpture, and contemporary art. Combining this with the markets for art-related products (2), such as merchandise and catalogues, estimated at 49.1 billion JPY, and art-related services (3), including art museum admission fees and consumption at the art festivals held around Japan, at 51.9 billion JPY, the overall scale of the art market is estimated to be 359 billion JPY.

Chart 1: Overview of Art-related Market Scale¹



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

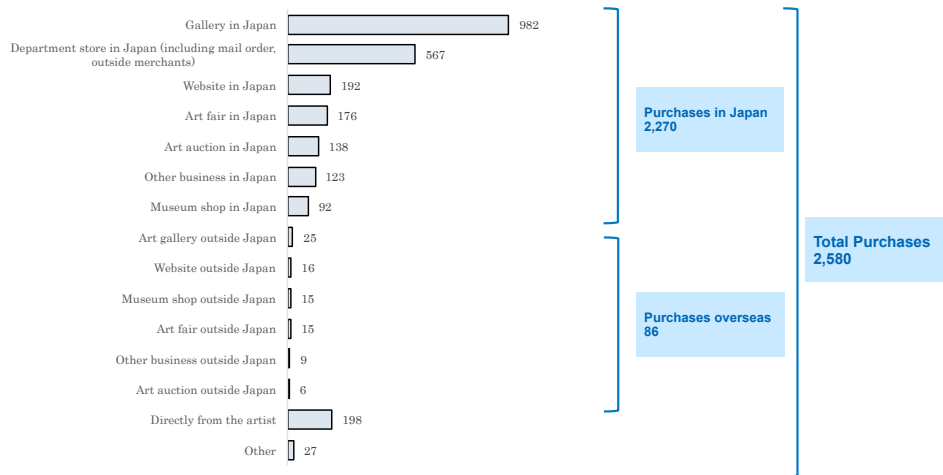
¹ Since each value is rounded off to the nearest billion yen (including fractions), there may be cases where the total value does not match the total of the values in the breakdown.

After Main Sales Channels of Galleries and Department Stores, Websites Also Growing

When viewing the 258 billion JPY market for artworks by sales channel, the largest channel is galleries in Japan at 98.2 billion JPY, followed by department stores at 56.7 billion JPY. The 19.2 billion yen for online sales also demonstrates the growth of that channel.

Chart 2: Market Scale for Works of Art by Sales Channel

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



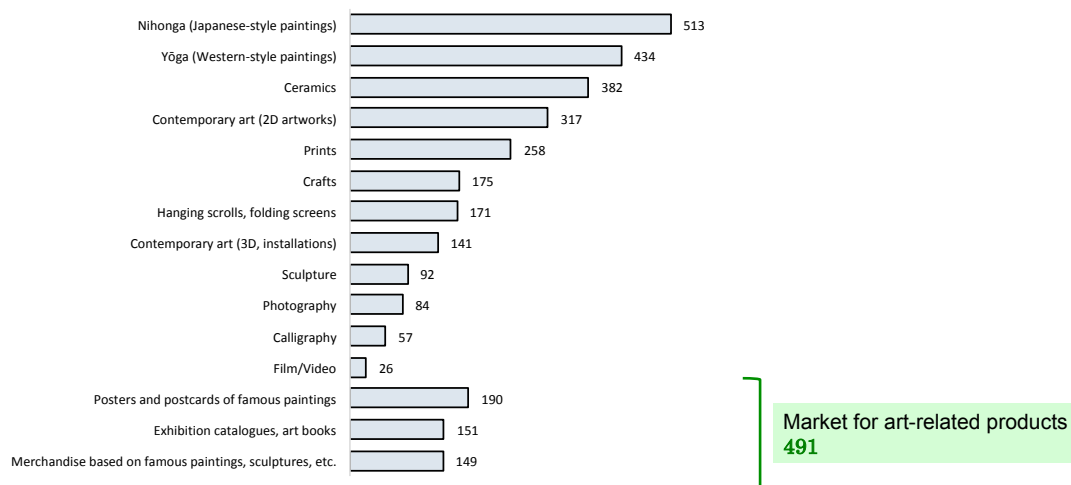
Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Japan's Highly Diverse Art Market

In terms of type, the artwork market is led by *nihonga* (51.3 billion JPY), followed by *yōga* (43.4 billion JPY), ceramics (38.2 billion JPY), contemporary art (2D artworks) (31.7 billion JPY) and prints (25.8 billion JPY). Here we can once again see how the Japanese art market is highly diverse in terms of type/medium and period, encompassing *nihonga* (Japanese-style paintings), *yōga* (Western-style paintings), contemporary art, ceramics, crafts, hanging scrolls and folding screens, and calligraphy. As such, the survey reveals the extent to which Japanese art has been influenced by lifestyle culture and history. In addition, the market for art-related products is 49.1 billion JPY.

Chart 3: Market Scale for Works of Art and Art-related Products by Type²

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



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

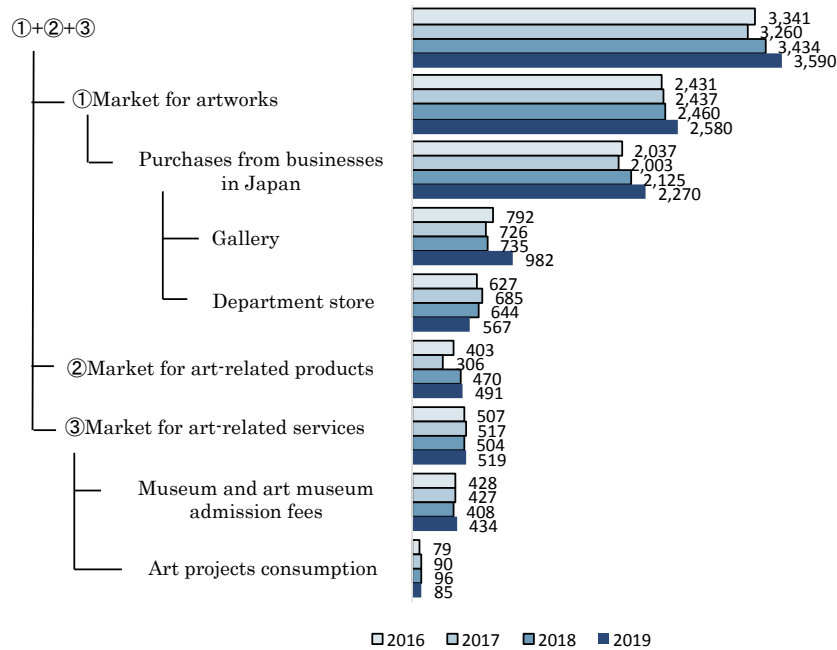
² The figures for purchases per type include duplicates, meaning the total for purchases of works of art here differs from the total of purchases of works of art per sales channel.

Comparison with Past Surveys

When we examine the changes in the survey results across the past four years, as shown in Chart 4, in regard to the major aspects of the art industry's market scale, the scale of the art industry (①Works of Art + ②Art-related Products + ③Art-Related Services) in 2019 increased to a record 359 billion yen. The sales for galleries grew significantly, though sales for department stores are declining. The markets for admission fees at museums and art museums as well as art-related products reached their highest levels yet.

Chart 4: Changes in Artwork Imports and Exports

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



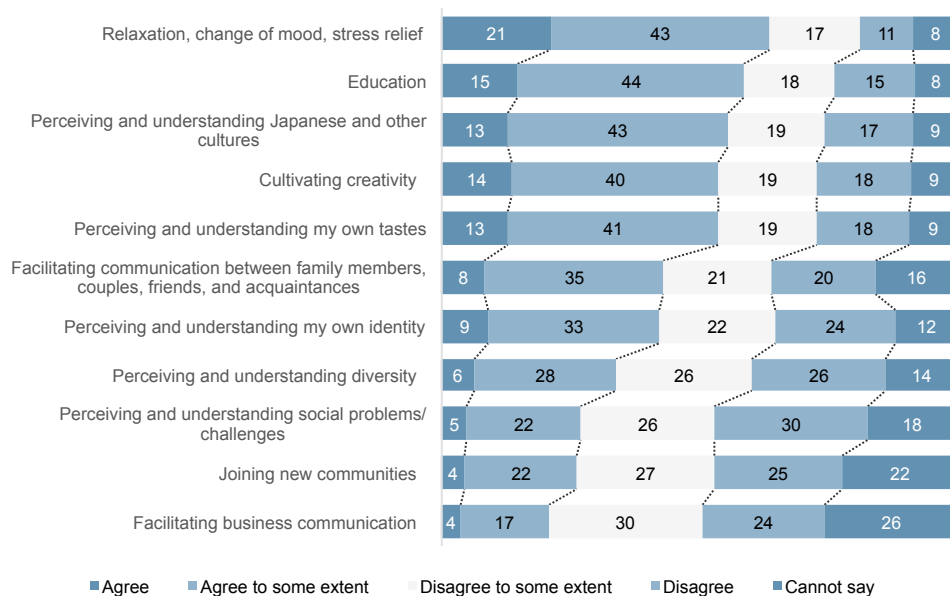
Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Effects of Viewing and Buying Art

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

Chart 5: effects of viewing art

(n=23,280)

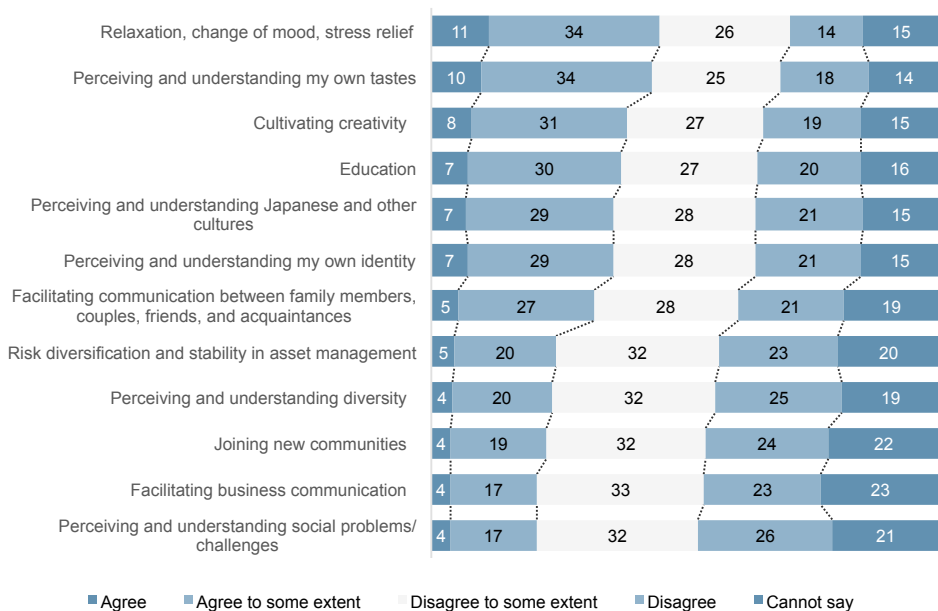


Source: Japanese Art Industry Market Research Survey 2019 (Art Tokyo Association, Platform for Arts and Creativity)

Similarly, respondents were also surveyed on what they think the positive effects are of purchasing works of art. As shown by the results in Chart 6, we can see that more people consider “Perceiving and understanding my own tastes” (44%), and “Perceiving and understanding my own identity” (36%), as positive effects of buying art than of viewing it.

Chart 6: effects of buying art

(n=23,280)



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

The survey also examined art import and export trends as well as art holdings per region and the areas where those art holdings were purchased. From this, results were estimated and converted into charts, which will be made available to the general public in the future.

Art Tokyo Association plans to continue conducting the survey in the future in order to accurately understand the state of the art market in Japan and clarify the influence of economic trends and social circumstances on the art industry. Alongside aspiring for the survey results to serve not only as findings for those in the art industry at home and abroad but also to function effectively as indices for industries developing art-related projects and services, Art Tokyo Association will continue to partner with related organizations and strive to contribute to the development of regional economics and the promotion of art and culture.

Survey Content Summary

Survey Method	Questionnaire survey targeting respondents registered to an online questionnaire service
Survey Period	September 19 – September 24, 2019
Survey Target	The survey was implemented in two stages with the following respective targets. First Survey: 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 Second Survey: People who bought a work of art for 100,000 yen or more in the past 3 years Targets set and collected per region
Valid Samples	First Survey: 23,280 samples Second Survey: 673 samples (surveyed per region)

Survey Overview

Survey	Japanese Art Industry Market Research Survey 2019
Report	Japanese Art Industry Market Research Report 2019
Organizer	Agency for Cultural Affairs Government of Japan, Art Tokyo Association
Planning and Survey	Art Tokyo Association
Survey Co-organizer	Platform for Arts and Creativity
Grant Program	Supported by the Agency for Cultural Affairs Government of Japan in the fiscal2019

Japanese Art Industry Market Research Survey website: <https://art-tokyo.jp/market>

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