Japan
2022 IT Priorities Survey Results

Survey fielded September – October 2021
TechTarget and IT Priorities Studies

About this study:

• Fielded during September to October 2021 to gather market insights on technology plans for 2022 and the impact of the global pandemic on technology spend outlook for the upcoming 12 months – into 1H 2022.

• This study aggregates 175+ respondents
  - Reflecting a blend of large enterprises, MSE and SMB organizations across a variety of industries
  - Responses from Japan
  - COVID-19 impact is evident in the results, but some important regional differences are apparent

Source: 2022 IT Priorities Japan | Sept-Oct 2021 | Published: November 2021
Top Observations for 2022
Japan
IT Priorities 2022 | High Level Takeaways

2022 is going to be a good year.
While the pandemic delayed or disrupted many projects (especially "on-premises" projects), 2022 plans point to a recovery at or above pre-pandemic levels.

Security is everyone’s job.
Security won big in redirected attention: 41% agree that security is more important for 2022, due to changes driven by the pandemic.

30% of Japan orgs describe themselves as "cloud-first"
These respondents also have the most aggressive spending plans for 2022.

The Future of Work is a major investment area.
69% of Japan organizations are investing in the “the future of work,” and 1-in-5 are investing aggressively / proactively.

Partnering with Managed Service Providers (MSPs) is an established Strategy for end users.
75% are planning to use MSPs in 2022.

Automation is a top priority for both business and technology workflow optimization.

Internet of Things (IoT) investment is expanding related to edge, security, on-premises investments, distributed cloud and more.

Ransomware protection purchase intent has grown since 2021, reflecting growth in the awareness and business impact of data security.
2022 IT Priorities

Budgets
How do you expect your organization’s technology budget for 2022 to differ from your 2021 budget?

- **16%** will increase by 5% or more
- **10%** will decrease by 5% or more
- **73%** will remain about the same

**Observations:**

- Buyers are optimistic about their tech budgets for 2022
- Only 10% of Japan firms expect a budget decrease from 2021 level
- 2022 is a good year for marketers
2022 IT Priorities

Pandemic Impact & Major Trends
In response to the global pandemic and other changes, which of the following broad technologies have become more important to your organization’s future than they were before? (Choose all that apply)

- Emphasize security in your messaging for 2022
- Cloud and investments in modernizing end user computing and experience management point to greater IT/Business alignment
- Safely extracting value from data through analytics and data management is of increased importance

### Observations:

- **Security/risk management**: 41%
- **Business and/or IT automation**: 22%
- **Data management & governance**: 20%
- **Digital Workspaces/Mobility/End-user computing**: 18%
- **Cloud (incl. computing, storage, applications, etc.)**: 18%
- **AI/data science/machine learning (incl. AI-enabled RPA)**: 17%
- **IT Service Management**: 16%
- **Business continuity/disaster recovery**: 14%
- **Robotic process automation (incl. AI-enabled RPA)**: 12%
- **IT Asset Management (software, hardware)**: 10%
- **Certification and/or skills development**: 8%
- **Unified Communications & Collaboration**: 8%
Quick Take:
12 technologies that are more important to business for 2022

In response to the global pandemic and other changes, which of the following broad technologies have become more important to your organization’s future than they were before? (Choose all that apply)

Security / Risk Management
Cloud Computing / Storage
Digital Workspaces / Mobility / EUC
Business / IT Automation
Data Management & Governance
Unified Communications & Collaboration
Certification and/or Skills Development
IT Asset Management (software, hardware)
ITSM
BC/DR
Robotic Process Automation
AI / Data Science / ML

Observations:
• **Cloud** and investments in **modernizing end user computing** and **experience management** point to greater IT/Business alignment
• Safely extracting value from data through **analytics** and **data management** garner increased importance
• Emphasize security in your messaging for 2022
“Future of Work” initiative strong @ 69% of companies investing

What is your organization’s current posture as it relates to supporting a digital-ready workplace and hybrid work environment [often described as “Future of Work”]?  

- Investing aggressively/proactively: 27%
- Investing moderately: 23%
- Investing as needed/reactively: 19%
- Not investing: 18%

Observations:

- It takes more than an ICP to find Future of Work buyers
- Here’s what FoW buyers are likely to be researching:
  - Unified communications platform (incorporating voice, video, messaging, screen sharing)
  - AI-enabled monitoring tools (incl. AIOps, APM, cloud, DevOps, log, metrics)
  - Productivity suites (i.e., Microsoft 365, Google Workspace)
  - Platform as a Service (PaaS)
  - Internet of Things (IoT) network infrastructure
IT / Cloud strategy
30% of organizations are “cloud first”

Which of the following best describes your organization’s overall IT/Cloud strategy?

- **30% Cloud first**
  1. DevOps
  2. Edge Computing / IoT / IIoT
  3. Cloud (incl. computing, storage, apps, etc.)
  4. Customer Experience
  5. Business Continuity / DR

- **46% Agnostic**
  1. On-premises infrastructure
  2. Managed Services (i.e., MSP, CSP, VAR, Consultants, etc.)
  3. Unified Communications & Collaboration
  4. IT Asset Management (software, hardware)
  5. Customer Experience

- **23% On-premises first**
  1. Core Apps (incl. ERP, HR, financial)
  2. Training, Certification and/or skills development
  3. On-premises infrastructure (Network/Compute, Storage)
  4. Unified Communications & Collaboration
  5. Employee Experience

Observations:

- Cloud First used to be an exception, now 30% of Japan organizations have a cloud bias
- Agnostics act like cloud 1st in most areas
- Sellers – address / discuss / have a POV on “cloud first” to appeal to majority of buyers
58% of those surveyed in Japan are actively adopting automation

Which of the following best describes the use of automation across your organization? (Select one)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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<tbody>
<tr>
<td>14%</td>
<td>We're leveraging automation to optimize BOTH IT and business workflows</td>
</tr>
<tr>
<td>17%</td>
<td>We're leveraging automation to optimize IT workflows</td>
</tr>
<tr>
<td>12%</td>
<td>We're leveraging automation to optimize business process workflows</td>
</tr>
<tr>
<td>15%</td>
<td>We have plans to leverage automation in the next 12 months</td>
</tr>
<tr>
<td>42%</td>
<td>We have no immediate plans to leverage automation</td>
</tr>
</tbody>
</table>

58% of orgs are investing in automation

- Automation is used by most respondents to optimize both business and tech workflows
- 1 in 6 will launch first-time automation projects during the coming year

- 72% of ‘cloud-first’ organizations leverage automation currently
- IT automation is consistent regardless of cloud or on-premises bias. Business automation is more likely at “cloud-first” organizations
- Advanced automation shops most likely to be interested in “outposts” / “Azure stack” hardware options
| 1.  | PC Hardware                          |
| 2.  | Finance/accounting                  |
| 3.  | App Modernisation                   |
| 4.  | Core HR Software                    |
| 5.  | Endpoint security                   |
| 6.  | E-signature                          |
| 7.  | Team collaboration / messaging software |
| 8.  | Security awareness training         |
| 9.  | Zero Trust                           |
| 10. | Analytics/BI platform (incl. augmented analytics, data vis, self-service BI) |
| 11. | Server hardware                     |
| 12. | Robotic process automation          |
| 13. | VPN/NAC (remote access; as a networking initiative) |
| 14. | Ransomware protection                |
| 15. | Hyperconverged infrastructure       |
| 16. | Off-premises cloud computing infrastructure |
| 17. | Risk assessment and visibility tools and services |
| 18. | Security tools                       |
| 19. | Cloud integration (iPaaS)           |
| 20. | DevOps                               |

**All Respondents**

**Most Popular Projects in Japan for 2022**

- 72% are leveraging Automation
- 30% describe themselves as “cloud first”
- 75% intend to leverage MSPs in 2022
2020 IT Priorities

Who we surveyed
2022 IT Priorities Survey Snapshot / Demographics

Survey fielded: Sept 2021 to October 2021

Deployed to members of TechTarget’s active audience in Japan

Company Size:
- 1000+: 48%
- 100-999: 25%

176 qualified respondents in Japan

Job Functions:
- C-level/VP/Director: 21%
- Managers: 31%
- Staff: 48%

Top industries represented:
- Higher Education
- Financial Services
- Government Administration
- Electrical/Electrical Manufacturing
- Retail
- Chemicals
- Insurance
Who we surveyed
Areas of responsibility

Which technology area(s) are you most focused on? (Choose all that apply)

- Internet of Things (IoT) or industrial IoT: 45%
- Information management (incl. data science/ML, BI/analytics, big data platform, DBMS, data lake…): 38%
- Security/security operations; risk/compliance: 37%
- App architecture & integration (incl. business process automation), software dev/DevOps: 22%
- Infrastructure & Operations (I&O) (incl. cloud/on-prem data center, storage, backup, IT architecture, edge): 20%
- Business and customer applications (incl. ERP, CRM, Customer Experience, HR, financial, content…): 15%
- Digital workspaces, Mobility & End-User Computing: 14%
- Network architecture, management and/or network operations: 14%

Observations:

- Most respondents have responsibility for 2+ functional areas—they wear multiple hats
- Employees at larger organizations tend to be more specialized
Thank You