

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

21 years of publishing technologyspecific content

140+
global B2B websites
covering over 10,000

technology topics

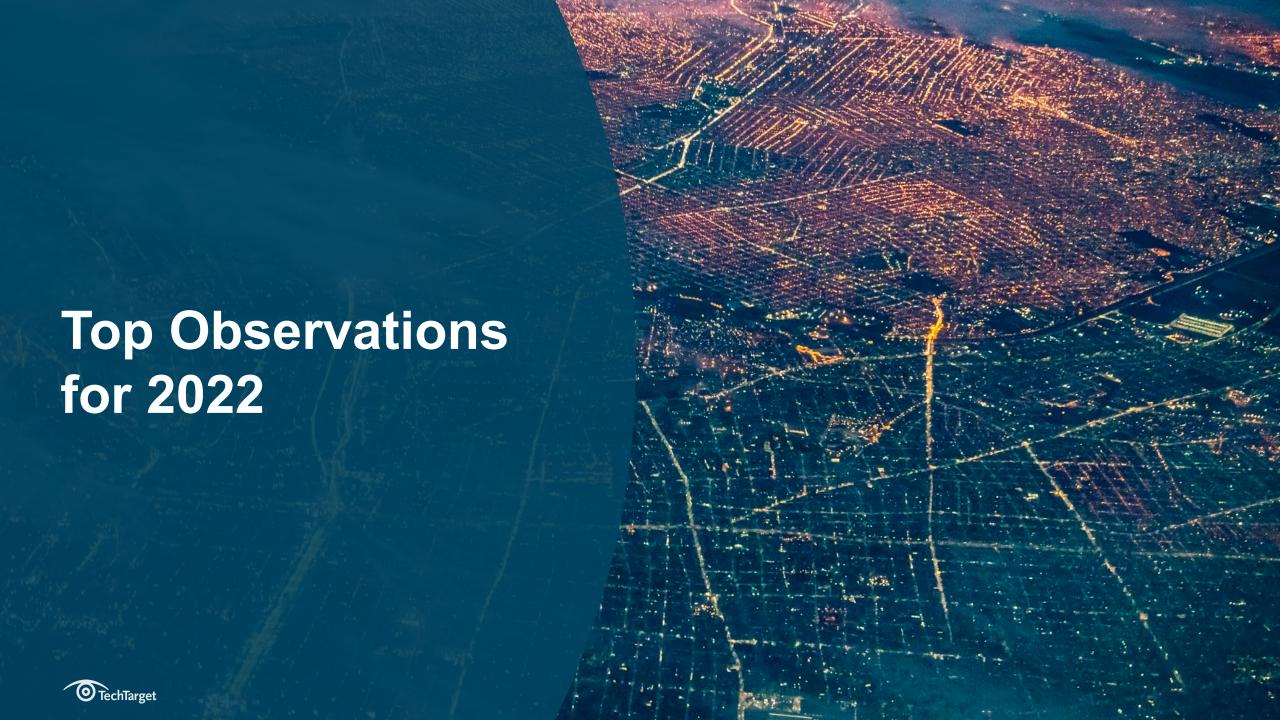
21.6M

IT and Business professionals opted-in and GDPR, CCPA compliant

Leader
B2B Marketing Data P

B2B Marketing Data Provider (Forrester Wave)





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.

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

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.

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.

Partnering with Managed Service Providers (MSPs) is an established Strategy for end users.

75% are planning to use MSPs in 2022.



TechTarget



Budget Expectations

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

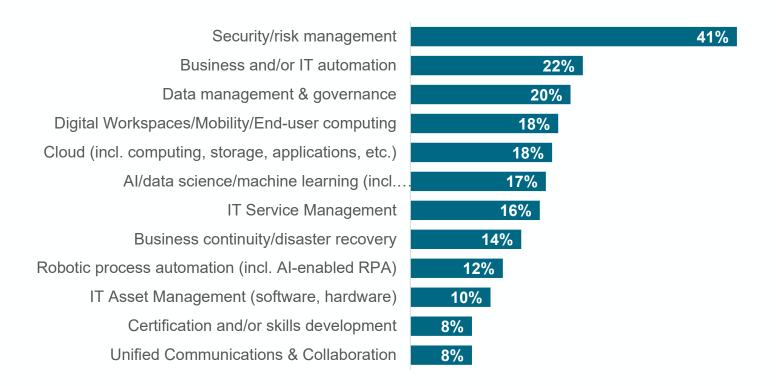


- Buyers are optimistic about their tech budgets for 2022
- Only 10%
 of Japan firms
 expect a budget
 decrease from
 2021 level
- 2022 is a good year for marketers



Security, Cloud, EUC & Automation more important to business future

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

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

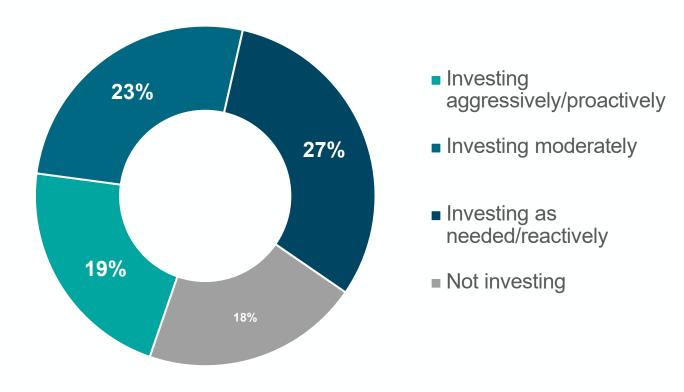
Robotic Process Automation

Al / Data Science / ML

- 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**"?



- 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)
 - Al-enabled monitoring tools (incl. AlOps, APM, cloud, DevOps, log, metrics)
 - Productivity suites (i.e., Microsoft 365, Google Workspace)
 - Platform as a Service (PaaS)
 - Internet of Things (IoT) network infrastructure

T / 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%

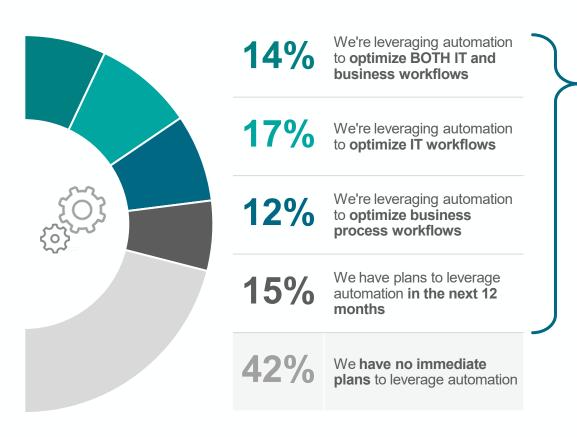
On-premises first

- 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

- 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)



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 firsttime 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

All Respondents

Most Popular Projects in Japan for 2022

- PC Hardware
- Finance/accounting
- 3. App Modernisation
- Core HR Software
- **Endpoint security**
- E-signature
- 7. Team collaboration / messaging software
- Security awareness training
- Zero Trust
- 10. Analytics/BI platform (incl. augmented analytics, data vis, self-service BI)

- Server hardware
- Robotic process automation
- 13. VPN/NAC (remote access; as a networking initiative)
- Ransomware protection
- Hyperconverged infrastructure
- Off-premises cloud computing infrastructure
- Risk assessment and visibility tools and services
- Security tools
- Cloud integration (iPaaS)
- 20. DevOps

are leveraging **72% Automation**

describe 30% themselves as "cloud first"

intend to **75%** leverage MSPs in 2022



2022 IT Priorities Survey Snapshot / Demographics

Survey fielded: Sept 2021 to October 2021

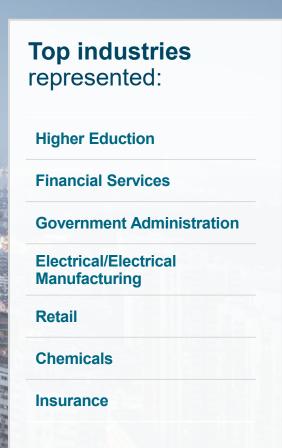


Deployed to members of **TechTarget's active audience** in Japan

176
qualified respondents in Japan

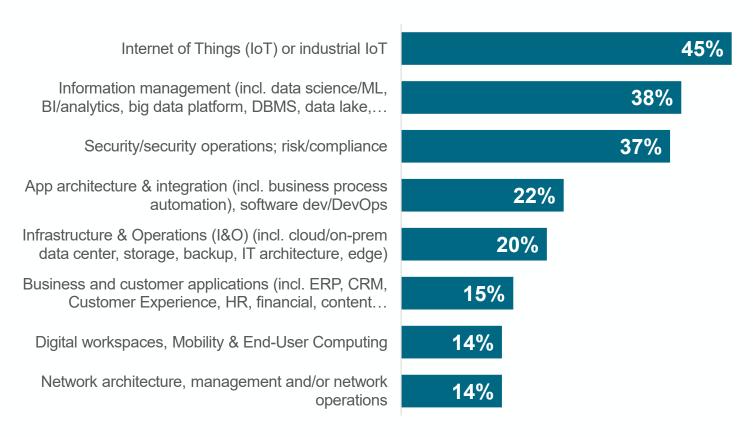


Job Functions: C-level/VP/ 21% **Director** 31% **Managers** 48% Staff



Who we surveyed **Areas of responsibility**

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



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

