

## **Big data Market in Japan: Key Research Findings 2012**

### **◆ Research Outline**

**Yano Research Institute has conducted a study on big data market with the following conditions:**

1. Research period: From November 2011 to April 2012
2. Research targets and methodologies: Our expert researchers created a scenario and estimation based on questionnaire conducted to IT vendors and users

#### **What is big data?**

Big Data in this research means data with whichever following factors: 1) Voluminous amount of data that requires special technology for analysis. 2) Any type of structured and unstructured data such as text, sensor data, audio, video, click streams, log files, data bases and etc. 3) Data frequently generated and processed at ultra-high speed. Big data market is everything that user companies invest money for accumulation, process and analysis of big data.

### **◆ Key Findings**

#### **■ Estimated Size of Big Data Market in FY2011 is 190 billion Yen, Despite Limited Needs for Data analysis**

The market at this time is consisted mostly of the BI (Business Intelligence) area to utilize the analysis of big data only for marketing objectives. The size of the market in FY2011 is estimated to be 190 billion yen which includes costs for software licenses, system development, hardware, and maintenance of systems.

However, it is difficult to utilize information acquired through data analysis for business operations from technical and operational points of view. Therefore, needs of data analysis are confined to limited areas. In fact, increasing number of companies have failed to utilize big data in their business. If big data market only targets their coverage to the current areas, the future market growth also is limited.

#### **■ Big Data Market may exceed 1,000 Billion Yen by FY2020, Potentially Developing to Smart City Infrastructure**

YRI has created a scenario and has predicted potential influence provided by the growing big data market viewed from three-stage periods as follows. Note that positioning and roles of big data can be dramatically different in 2020 from what it is now:

1. Short-term: (FY2011 -): Companies are likely to invest on Big Data for data analysis to bring about sales improvement and speedy business management.
2. Mid-term: (FY2015 -): Big data can be used for gaining competitive edge which may lead to structural reforms in the industry.

3. Long-term (FY2017 -): Big data technologies may be utilized in infrastructures of Smart Cities that optimize wastes and excess from societies.

This scenario expects the size of big data market to reach 630 billion yen in FY2017, and achieve a thousand billion yen by FY2020.

◆ **Report format:**

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Price: 157,500 yen (7,500 yen of consumption tax shall be charged for the sales in Japan.)

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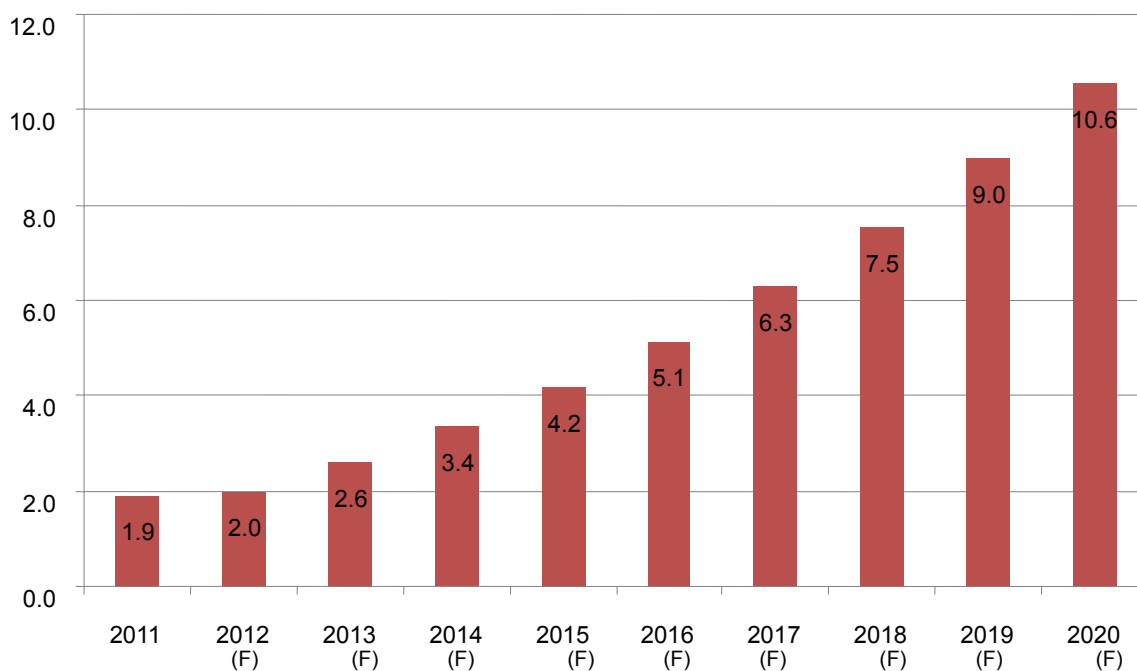
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■ **Figure 1: Transition of Size of Big Data Market**

(Hundred billion yen)

FY	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Big data Market	1.9	2.0	2.6	3.4	4.2	5.1	6.3	7.5	9.0	10.6
Y-o-Y		105.0%	129.7%	129.6%	124.4%	123.3%	121.9%	120.4%	119.0%	117.7%
CAGR		5.0%	16.7%	20.9%	21.7%	22.0%	22.0%	21.8%	21.4%	21.0%



Note:

1. Figures are based on IT investment values generated in user companies which include costs for software licenses, system development, hardware, and maintenance of systems.
2. (F) indicates forecast figures.