

Domestic Investments to IT in Japan: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a survey on the current status and future prospects regarding IT investments from domestic companies and organizations with the following conditions:

1. Research period: From July to October, 2014
2. Research targets: Domestic companies, organizations and public institutions
3. Research methodologies: Mail-in survey to domestic companies, organizations, and public institutions, and literature research

What are the Market Size of IT Investments from Domestic Private Companies?

The market size of investments to information technologies, or IT, from the domestic private companies in this research is calculated based on the data from the Ministry of Economy, Trade and Industry, and Ministry of Finance, added with the results of the questionnaire to the domestic companies on the IT investments conducted by Yano Research Institute.

Period of Questionnaire Conducted: August to October 2015; Targets of the Questionnaire: 546 domestic private companies and public institutions; Methodologies: Mail-in Questionnaire.

◆ **Key Findings**

■ **Market Size of IT Investments from Domestic Private Companies Expected to Grow by 2.8% on a Y-o-Y Basis to Attain 11,635 Billion Yen in FY2015**

The market size of investments to IT, or Information Technologies (including both hardware and software) from the domestic companies in FY2015 is expected to attain 11,635 billion yen, up by 2.8% from the previous fiscal year. Due to improved business sentiment shown at large and mid-size companies, investments to IT are likely to be continuously on the rise.

■ **Information Security Became Significant Concern**

The results of the survey showed that many companies are concerned to ensure more robust information security.

A system to manage and operate personal information has become the top priority for many enterprises after recent cases of personal information leakage occurred, which seem to have increased the investments to IT at many companies and organizations.

◆ **Report format:**

Published report: "IT Investment by Domestic Companies 2015"

Issued on: December 7, 2015

Language: Japanese

Format: 227 pages in A4 format

Price: 180,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

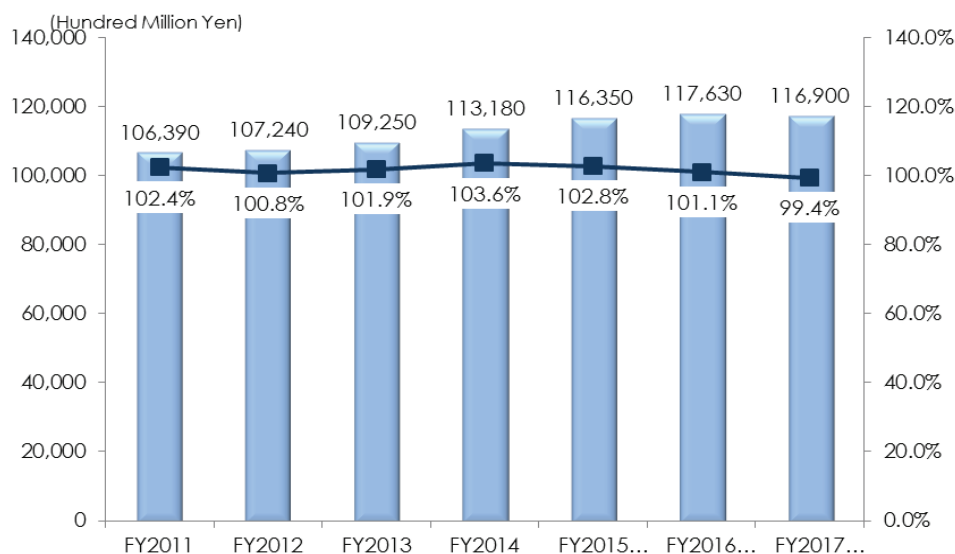
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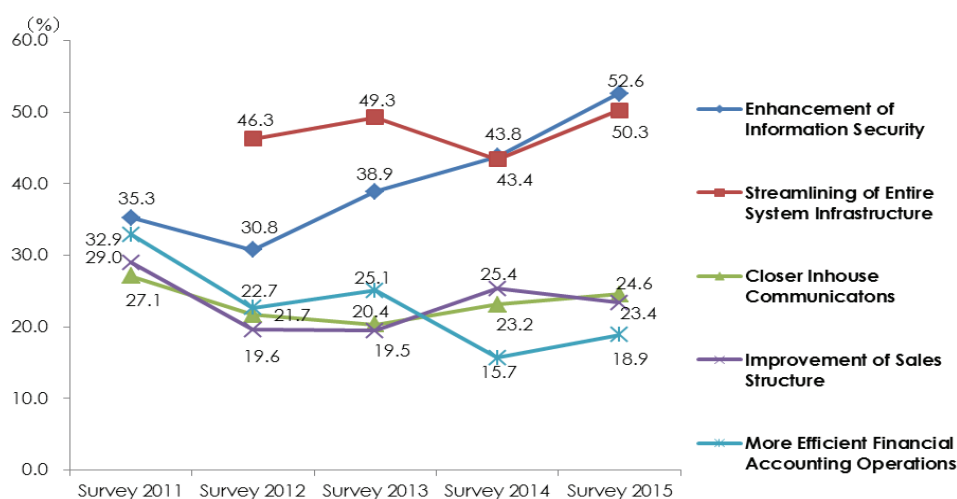
■ **Figure 1: Transition and Forecast of Domestic Private IT Market Size**



Notes:

1. The figures from FY2011 to FY2014 are estimation by Yano Research Institute based on the data from the Ministry of Economy, Trade and Industry, and Ministry of Finance.
2. The market size is based on the amount of investments to Information Technologies.
3. The domestic private IT market size include the followings: Hardware; Software developed by IT vendors from scratch or those packaged ones; Services of maintenance, operational management, and outsourcing; Online services including ASP and Cloud; Network usage fees; and Consulting.

■ **Figure 2: Objectives of IT Investments for the Next 3 Years (Results of Questionnaire to Enterprises)**



Notes:

4. Period of Questionnaire Conducted: August to October 2015 (all other surveys from 2011 to 2014 have been conducted in July and August); Targets of the Questionnaire: 513 domestic private companies and public institutions (431 companies and institutions in 2011 and 2012 surveys, 570 companies and institutions in 2013 survey, and 569 companies and institutions in 2014 survey); Methodologies: Mail-in Questionnaire. Top 5 responses have been extracted out of multiple responses.
5. There was no questionnaire item “Streamlining of Entire System Infrastructure” in survey 2011.