

Japan SaaS Market Outlook and Projections, 2019-2027

<https://marketpublishers.com/r/JE9FF65E5D92EN.html>

Date: November 2019

Pages: 49

Price: US\$ 2,250.00 (Single User License)

ID: JE9FF65E5D92EN

Abstracts

Software as a Service is one of the three types of cloud computing services. With the growing demand for innovation and reducing IT budgets, most of the companies are adopting cloud based solutions to optimize the business efficiency.

SaaS offerings include hosting, use of application, ongoing maintenance, and update services. SaaS solutions are offered through a subscription model and not license fee.

Some of the factors contributing to the growth of SaaS based solutions are; rise in demand for consultative support from IT organizations, growing applications that require specific business requirements and low cost of SaaS solutions.

Improved internet connectivity, surge in use of instant messaging, and the emergence of social media, emails & video calls for personal and business needs is fueling the market growth.

High penetration rate of cloud services in Japan is one of the key element boosting the adoption of cloud based services among various end users in the country. Japan is ranked second among the major markets for global cloud services. The country holds one of the most steady and developed markets for cloud services in the Asia-Pacific region. Moreover, Japan has one of the supreme widespread broadband fiber deployments with the highest number of fiber users in the world, which also significantly contributes to the country ranking.

Rising government investments to develop AI technology coupled with rising awareness amongst SMEs about benefits of SaaS based solutions has positively influenced the SaaS market growth. In 2018, the Labor Ministry of Japan has invested USD 179.8

million for applying AI to medical data management and pharmaceutical research. The government is also promoting AI to improvise productivity to reduce the negative impact of labor shortage and rapidly graying population.

In 2018, Japan's private cloud services market recorded an increase of approx. 40% as compared to previous year. During 2018-2019, the country witnessed more than 200 SaaS based startups and the number is expected to further increase in upcoming years.

The Japan SaaS market can be segmented on the basis of deployment model, software type, enterprise size and end user. On the basis of deployment model, the market is bifurcated into public, private and hybrid cloud. Based on software type, the market is divided into business intelligence software, customer relationship management (CRM) software, enterprise resource planning (ERP) software, business accounting software, supply chain management software and others. By enterprise size, the market is divided into SMEs and large enterprises. On the basis of end user, the market is categorized into manufacturing, BFSI, retail, healthcare and others. Other end users include telecommunication, media & entertainment, government & public sector, energy, education and others.

On the basis of application, the market for supply chain management software is expected to grow at a significant rate owing to rise in demand for real-time monitoring of supply chain networks and goods in transportation sector. Moreover, rise in ICT expenditure in the Japan by government & private sector is further expected to boost the market growth.

In 2018, CRM was the largest revenue generating segment, accounting for approx. 30%, and is expected to maintain its dominance throughout the forecast period. SCM and ERP are expected to grow at a significant CAGR during the forecast period.

The subscription based model of the SaaS has stimulated the adoption of technology in various industries. In Japan, many SMEs, which are at startup position and are not equipped for licensing the software are switching to SaaS based model as they are subscription based and cost effective.

End user segments involving analytics, product life cycles, content management are expected to witness increased adoption of SaaS solutions owing to faster development rates and migration from current infrastructure to cloud based applications.

Growth in IT industry in the country coupled with increased demand for data analysis

software, high speed and customized solutions are favoring the growth of SaaS market.

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