

Call Center (Telemarketing)/Contact Center/CRM Solution Market in Japan: Key Research Findings 2015

◆ Research Outline

Yano Research Institute has conducted a study on the domestic call center/contact center/CRM solution market with the following conditions:

1. Research period: From October 2015 to January 2016
2. Research target: Telemarketing agencies and contact center/CRM solution vendors
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email and literature research

What is the call center (telemarketing) market?

Size of the call center (telemarketing) market in this research is calculated based on sales of the outsourcing agencies (telemarketing agencies) commissioned to take inbound/outbound telephone calls, or to provide customer support services through web, fax, and social media.

What is the contact center/CRM solution market?

Size of the contact center/CRM solution market in this research is calculated based on sales of the businesses that provide contact center services and CRM solutions for call centers and contact centers. The market size includes sales of hardware, software, system integration, service& support, and SaaS services.

◆ Key Findings

■ **Despite Demands Stemming from Social Security and Tax Number System and Freeing Up of Household Electricity, Growth of Entire Market Size May be Small**

CAGR (Compound Average Growth Rate) of the call center (telemarketing) market is likely to keep 1.8% from FY2012 to FY2017, with the market size of FY2017 projected to attain 863.7 billion yen, based on turnover of the businesses. The market in FY2014 expanded due to increasing number of inquiries concerning NISA (Nippon Individual Savings Account) that launched in 2014, which raised the number of inquiries related to finance as well as e-commerce. However, overall market growth is likely to remain small, though the market is promising both in FY2015 and in the period between FY2016 and FY2017, the former because of the increasing demands expected to prepare for and to cope with the Social Security and Tax Number System in effect in January 2016, and the latter because of liberalization of electricity market to be started in April 2016.

■ **Wider Application of Contact Center/CRM Solutions May Bring About Certain Level of Market Expansion**

CAGR of the contact center/CRM solution market is likely to be 3.9% from FY2012 to FY2017, with the market size in FY2017 likely to attain 486.0 billion yen, based on turnover of the businesses.

Steady growth is expected for the contact center solution market from FY2014 to FY2015. The entire market is likely to show more than a certain level of growth, because introduction

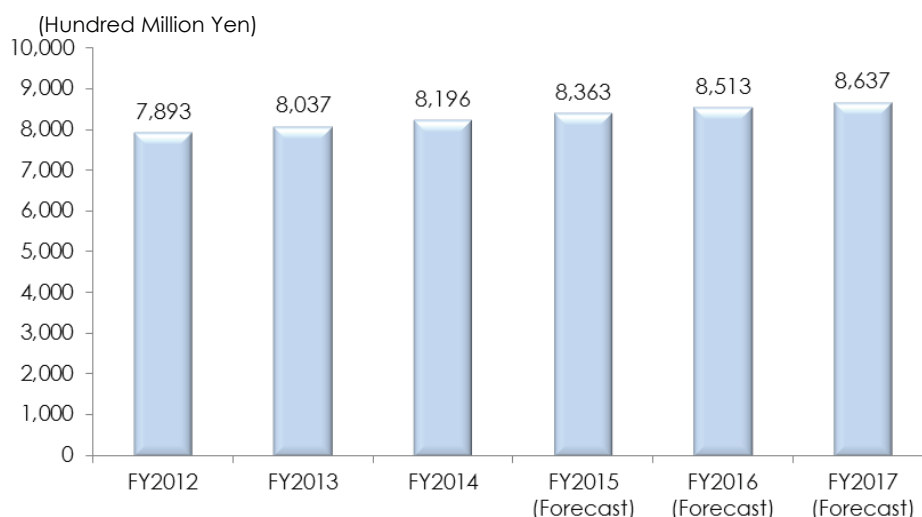
of cloud computing services is likely to increase at small and mid-size enterprises now that those services have become affordable, and large companies are expected to improve and expand their systems in an attempt to enhance their new support service structure that merges the telephone support services and the customer contacts (inquiries and complains) through web.

◆ **Report format:**

Published report: “Call Center Market 2016”
 Issued on: January 22, 2016
 Language: Japanese
 Format: 756 pages in A4 format
 Price: 150,000 yen (consumption tax shall be additionally charged for the sales in Japan.)

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■ **Figure 1: Transition and Forecast of Call Center (Telemarketing) Market Size**



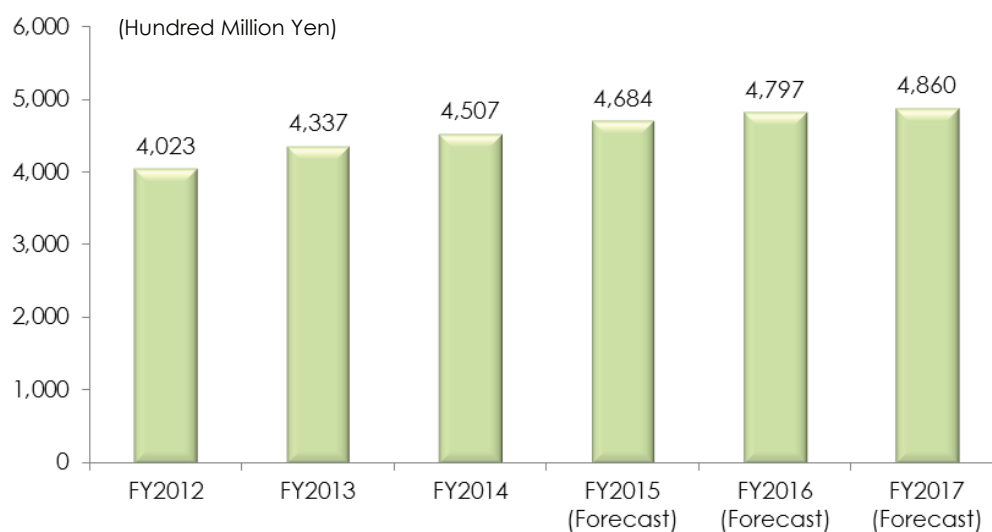
	FY2012	FY2013	FY2014	FY2015 (Forecast)	FY2016 (Forecast)	FY2017 (Forecast)
Call Center (Telemarketing) Market Size	7,893	8,037	8,196	8,363	8,513	8,637
Y-o-Y Comparison		101.9%	101.8%	102.0%	102.0%	101.8%

Estimated by Yano Research Institute

Notes:

1. The market size is based on sales of the outsourcing agencies.
2. Size of the call center (telemarketing) market in this research is calculated based on sales of the outsourcing agencies (telemarketing agencies) commissioned to take inbound/outbound telephone calls, or to provide customer support services through web, fax, and social media.

■ **Figure 2: Transition and Forecast of Contact Center/CRM Solution Market Size**



	FY2012	FY2013	FY2014	FY2015 (Forecast)	FY2016 (Forecast)	FY2017 (Forecast)
Contact Center/CRM Solution Market Size	4,023	4,337	4,507	4,684	4,797	4,860
Y-o-Y Comparison		107.6%	107.8%	103.9%	103.9%	102.4%

Estimated by Yano Research Institute

Notes:

3. The market size is based on sales of the solution vendors.
4. Size of the contact center/CRM solution market in this research is calculated based on sales of the businesses that provide contact center services and CRM solutions for call centers and contact centers. The services include hardware, software, SI services/support, and SaaS services.