

Call Center (Telemarketing)/Contact Center/CRM Solution Market in Japan: Key Research Findings 2016

◆ 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: July to November 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 the sales of outsourcing agencies (telemarketing agencies) commissioned to take inbound/outbound telephone calls, or to provide customer support services through web/fax.

What is the contact center/CRM solution market?

Size of the contact center/CRM solution market in this research is calculated based on the sales of the companies providing 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

■ Slight Market Increase Stems from Electricity Deregulation and Mail-Order Demands, with More Interests in Use of AI Backed by Boom of Third-Generation AI

CAGR (Compound Average Growth Rate) of the call center (telemarketing) market is likely to keep 1.9% from FY2013 to FY2018, with the market size of FY2018 projected to attain 883.1 billion yen. The market is slightly on the rise because of growing demands relating to electricity deregulation and My Number system, together with expanding tasks of mail orders at call centers. On top of that, the future growth factors are considered to be multi-language-available services and utilization of AI, both of which are regarded to be adopted by increasing number of companies, the former due to expansion of foreign visitors, and the latter backed by a boom of the third-generation AI.

■ Cloud Services Likely to Widen Market Acceptance, While New Needs Emerged in Non-Voice Area

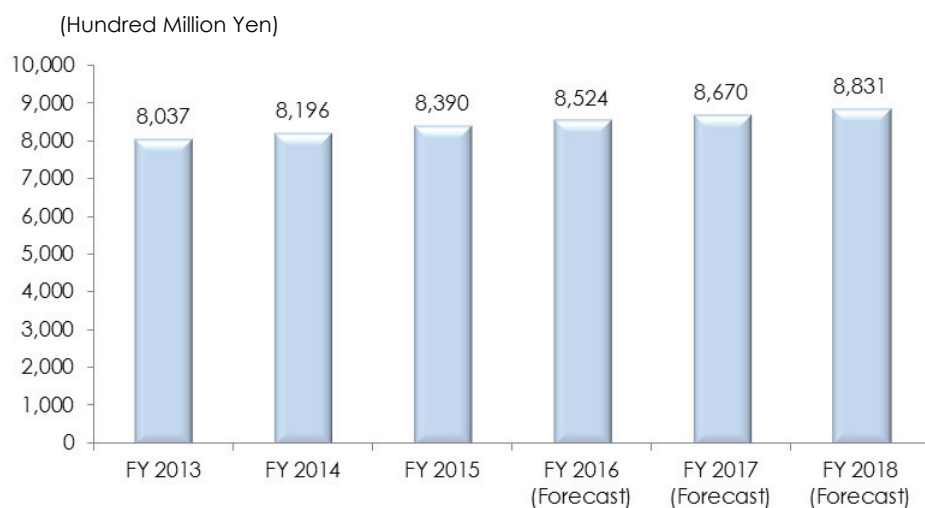
CAGR of the contact center/CRM solution market is projected to be 2.7% from FY2013 to FY2018, with the market size of FY2018 to attain 494.5 billion yen. With progressive adoption of cloud services at small and mid-size companies and increasing access to contact centers through mobile devices, the adapted applications are expected to expand. In addition, with non-voice (text-based) inquiries expected to become common, the following demands are likely to increase: More vocal data needed to be converted into text, more text needed to be collected, and more data needed to be analyzed.

◆ **Report format:**

Published report: “Call Center Market 2017”
 Issued on: November 30, 2016
 Language: Japanese
 Format: 929 pages in A4 format
 Price: 180,000 yen (consumption tax shall be additionally charged for the sales in Japan.)

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



(Hundred Million Yen)

	FY 2013	FY 2014	FY 2015	FY 2016 (Forecast)	FY 2017 (Forecast)	FY 2018 (Forecast)
Call Center (Telemarketing) Market Size	8,037	8,196	8,390	8,524	8,670	8,831
Y-o-Y Comparison	101.8%	102.0%	102.4%	101.6%	101.7%	101.9%

Calculated by Yano Research Institute

Notes:

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

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



(Hundred Million Yen)

	FY 2013	FY 2014	FY 2015	FY 2016 (Forecast)	FY 2017 (Forecast)	FY 2018 (Forecast)
Contact Center/CRM Solution Market Size	4,337	4,507	4,639	4,758	4,853	4,945
Y-o-Y Comparison	107.8%	103.9%	102.9%	102.6%	102.0%	101.9%

Calculated by Yano Research Institute

Notes:

3. The market size is based on the sales of solution vendors.
4. Size of the contact center/CRM solution market in this research is calculated based on the 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.