

## **Internet Marketing Tools: Key Research Findings 2010**

*- Automation of Internet marketing has been progressed by the cooperative use of related tools with new and enhanced functions. -*

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the Intranet Marketing Tools as described below.**

1. Research period: August to December 2010
2. Research targets: Major vendors of the Internet marketing and related tools
3. Research methodologies:  
Face-to-face interviews by YANO expert researchers, supplemented by telephone and e-mail follow-ups, and literature researches

#### **< What is Internet marketing tool? >**

Internet marketing tools in this research are consisting of 3 categories, analytic tools including access analysis tools, word-of-mouth analysis and internet audience rating research, optimization tools including recommend engines, web site search engines, automatic bidding tools, LPO & EFO tools, and mail distributions systems.

### ◆ **Key Findings**

- **Internet marketing tools market has grown significantly and exceeded 19.5 billion yen in fiscal 2009, driven by the “optimization tools”.**  
The total market size of the Internet marketing and related tools in fiscal 2009 has expanded to 19.57 billion yen (111.8% year-on-year), especially the significant growth of “optimization tools” (135% year-on-year: 5.062 billion yen in value) has contributed to expanding the total market.
- **With the provision of new functions and combined use of related tools, the automation of the Internet marketing has been enhanced.**  
Automatization of Internet marketing has been progressed by the cooperative use of related tools with new and enhanced functions. With the effects of new tools, the operational expenses of the user enterprises have been reduced.
- **“Optimization tools” will drive the total market, and the market size of the Internet marketing tools is expected to reach 26.2 billion yen in fiscal 2012.**  
The number of Internet marketing tool user enterprises is expected to continue increasing as supported by the improvement of tool accuracy and enhancement of tool usefulness. In and after 2010, the market is expected to keep expanding further, and to reach 26.25 billion yen in fiscal 2012.

### ◆ **Report format:**

Published report: “Online Marketing Tool Market 2010”  
Issued in: December 2010  
Language: Japanese  
Format: 422 pages in A4 format  
Price: 150,000 yen (7,500 yen of consumption tax shall be charged for the sales in Japan.)

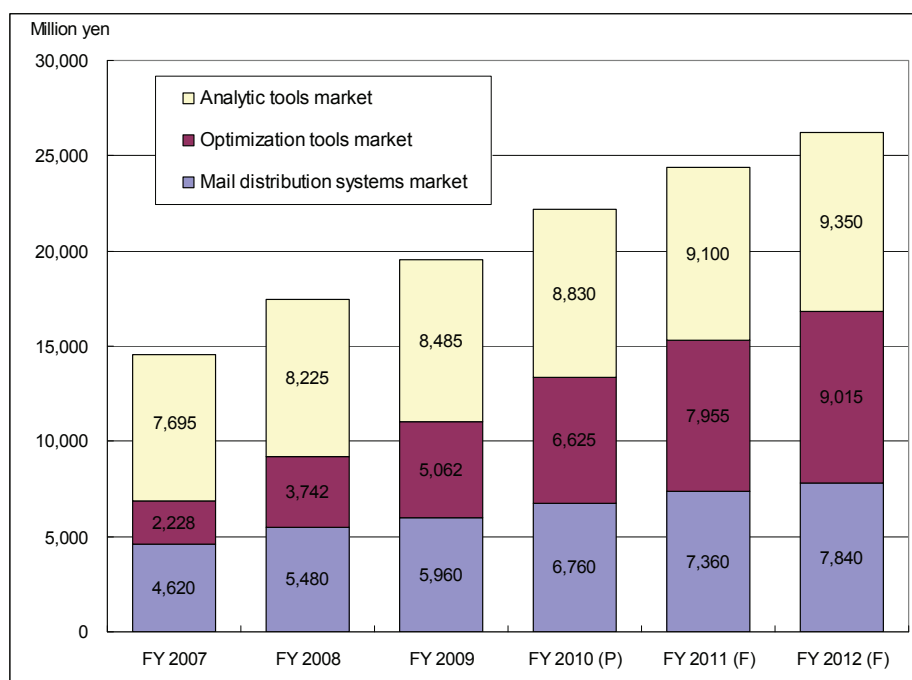
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Fig. 1: Internet Marketing Tools: Total Market Size Transition



Estimated by Yano Research Institute

Table 1: Internet Marketing Tools: Market Size Transition by Tool Type

(Unit: Million Yen)

	FY 2007	FY 2008	FY 2009	FY 2010 (P)	FY 2011 (F)	FY 2012 (F)
	Apr-07 to Mar-08	Apr-08 to Mar-09	Apr-09 to Mar-10	Apr-10 to Mar-11	Apr-11 to Mar-12	Apr-12 to Mar-13
Access analysis tools	5,915	6,320	6,505	6,750	6,910	7,100
Word-of-mouth analysis	540	585	645	730	825	880
Internet audience rating research	1,240	1,320	1,335	1,350	1,365	1,370
<b>Analytic tools (Sub total)</b>	<b>7,695</b>	<b>8,225</b>	<b>8,485</b>	<b>8,830</b>	<b>9,100</b>	<b>9,350</b>
Recommend engines	498	1,107	1,342	1,630	1,880	2,005
Web site search engines	1,510	1,985	2,475	2,935	3,350	3,710
Automatic bidding tools	65	195	375	745	1,100	1,450
LPO tools	155	355	595	775	920	1,040
EFO tools	0	100	275	540	705	810
<b>Optimization tools (Sub total)</b>	<b>2,228</b>	<b>3,742</b>	<b>5,062</b>	<b>6,625</b>	<b>7,955</b>	<b>9,015</b>
<b>Mail distribution systems</b>	<b>4,620</b>	<b>5,480</b>	<b>5,960</b>	<b>6,760</b>	<b>7,360</b>	<b>7,840</b>
<b>Internet marketing tools, total market size</b>	<b>14,543</b>	<b>17,447</b>	<b>19,507</b>	<b>22,215</b>	<b>24,415</b>	<b>26,205</b>

Estimated by Yano Research Institute

- Note 1: Figures are based on the shipments in value from the tool vendors. (P) indicates projection, and (F) forecast
- Note 2: In-house development tools and those provided as a part of site building package are excluded, and limited to those marketed as independent tools.
- Note 3: Access analysis tool means a tool which permits comprehensive analysis of the users who visit a specified web site in terms of the number of visits, page viewing frequencies, site staying time, keyword, etc. The market size includes advertising effectiveness measurement tools.
- Note 4: Word-of-mouth analysis means to measure and analyze the trend of topics, including how specific keywords are evaluated, in the work-of-mouth media such as blogs.
- Note 5: Internet audience rating research is, same as TV rating research, to organize a specific panel, and to measure the behavior of the panel members in the specific web site.
- Note 6: Recommend engine permits to display recommended contents based on the attitude/taste of the individual visitors identified in their past visits.
- Note 7: Web site search engine permits to search desired contents within a specific web site by entering keywords.
- Note 8: Automatic bidding tool is used mainly to support the user to manage their keyword listing advertisement activities by automating the bidding for specific keywords, and to optimize the effects of the keywords.
- Note 9: LPO (Landing Page Optimization) tool is used for optimizing the contents of the first page a customer visit, and to reduce the departure rate. EFO (Entry Form Optimization) is to optimize the input form provided for the users to improve user-friendliness and to enhance user engagement.
- Note 10: Mail distribution system provides stable operation of email distribution in large quantities, in addition to various mail distribution related functions.