

## **BtoB Outbound Telemarketing Service: Key Research Findings 2011**

*- Small but steadily growing, high-value added telemarketing service market -*

### ◆ **Research Outline**

**Yano Research Institute has conducted a study on the BtoB outbound telemarketing service market as described below.**

1. Research period: January to March 2011
2. Research targets:  
Outbound telemarketing service providers, outbound telemarketing solution vendors
3. Research methodologies:  
Face-to-face interviews by YANO expert researchers, supplemented by telephone and e-mail follow-ups, and literature researches

#### **< What is telemarketing service? >**

- BtoB outbound service: A service to conduct telephone calls to enterprise users specified by the contractor
- Inbound service: A service to answer to incoming phone calls for the contractor
- BtoC outbound service: A service to conduct telephone calls to consumer users specified by the contractor

### ◆ **Key Findings**

#### • **Oligopoly of telemarketing service industry is advancing**

As the telemarketing business could be defined as a process industry as well as a labor-intensive industry, major enterprises are in an advantageous position with their capability for large-scale investments in human resources and operational facilities. This trend is especially evident with inbound and BtoC outbound telemarketing services, and oligopoly of the market has been advancing.

In case of BtoB outbound service, in the meantime, it is more important and so desired by the clients to assign highly professional personnel for contacting relatively limited number of prospective customers, and to achieve results steadily from these calls, rather than contacting greater number of prospects in the list. Under these circumstances, large-scale providers may not necessarily be advantageous with their capability to invest in equipment and human resources. Mid to small size providers, thus, are beginning to focus on the BtoB outbound services.

#### • **BtoB outbound service is small in market size, but growing steadily**

The BtoB outbound service market had shrunk in fiscal 2009 by 8.4 percent compared to the preceding year, due to the reduction of advertisement expenditure at the user enterprises and reallocation of outsourced works into in-house operations, driven by the impacts of Lehman Shock.

However, as the reform of cost structure has settled down, the enterprises are starting to consider that they should not reduce the sales promotional expenditure which will lead to the increase of sales.

Up to date, most of the users of BtoB outbound service are limited to IT related enterprises in Japan. From now on, however, as observed in the United States, it can be expected that the enterprises in other industries may notice the effectiveness, and start using BtoB outbound services. In addition, as it is likely that the scope of service may be expanded by combining other media as well, the BtoB

outbound service is expected to keep growing gradually but steadily in the future.

The market size of BtoB outbound service in Japan is expected to grow from 7,855 million yen in fiscal 2008 to 8,300 million yen in fiscal 2013, with average annual growth rate (CAGR) of 1.1 percent.

◆ **Report format:**

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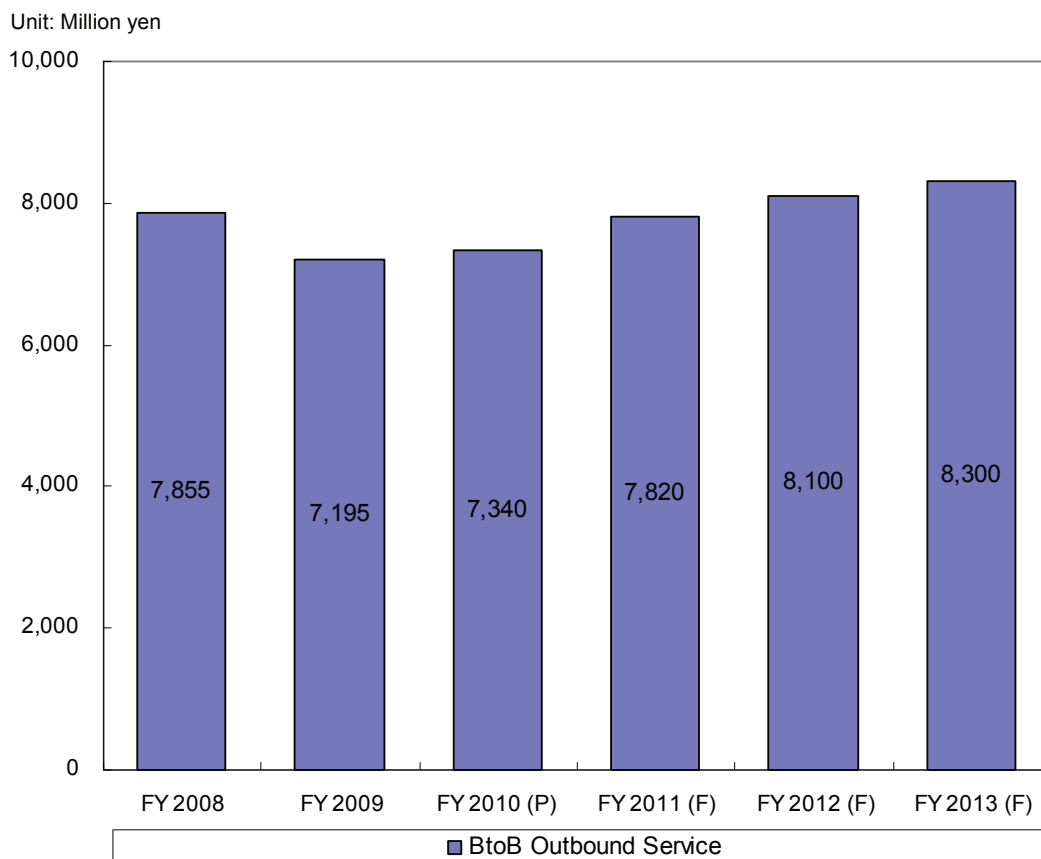
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Fig.1: BtoB Outbound Service Market Size Transition (FY 2008 – FY2013)



Estimated by Yano Research Institute

Note 1: Based on the sales value of the service providers

Note 2: Figures for FY 2008 and 2009 are actual records, projection for 2010, and forecast for 2011 and thereafter.

Note 3: Impacts of Great East Japan Earthquake have not been taken into consideration.