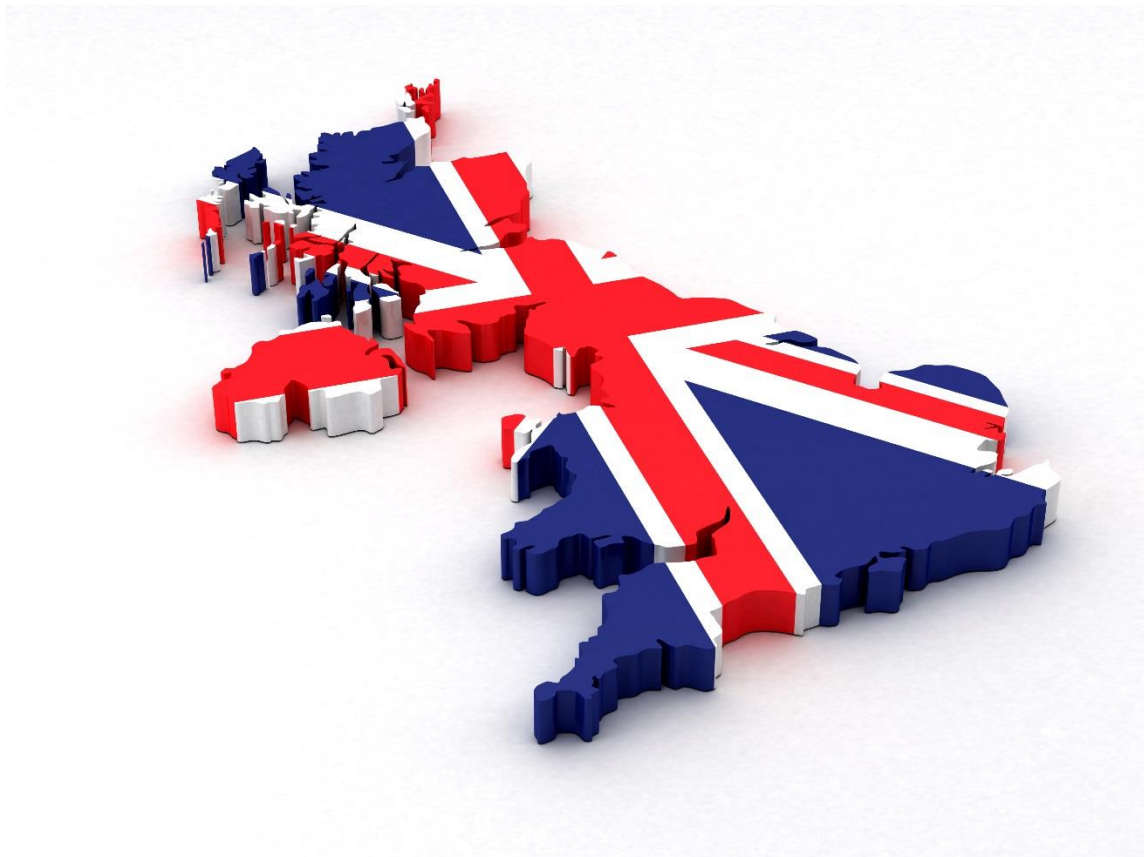




UK Contact Centres: 2019-2023

The State of the Industry & Technology Penetration
(16th edition)

The reality of your market today - and in the future



Market sizing: 4,000+ UK operations analysed, with market sizing tracked over 16 years

Detailed segmentation: 16 vertical markets, 7 size bands, 12 regions

Forecasts until 2023 for agent positions, contact centres, jobs and technology penetration

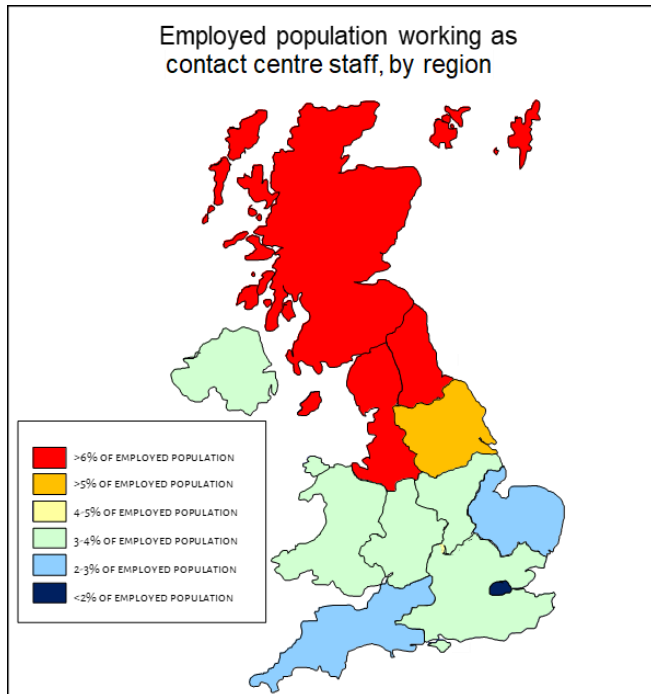
Technology penetration rates: 13 technologies, by vertical and size band, with forecasts

Published December 2018

Key findings

There are 6,175 contact centres in the UK, with 772,500 agent positions.

After the UK contact centre industry's decline in 2009 - both in terms of contact centres and agent positions - 2011 - 2016 saw a steady increase after 2010's tentative growth, with this year again seeing a decline in the number of operations.



Large contact centres (with over 250 agent positions) employ more than half of all contact centre staff, despite only accounting for 9% of physical contact centre sites.

The finance industry is the largest employer, with over 235,000 contact centre jobs in the sector.

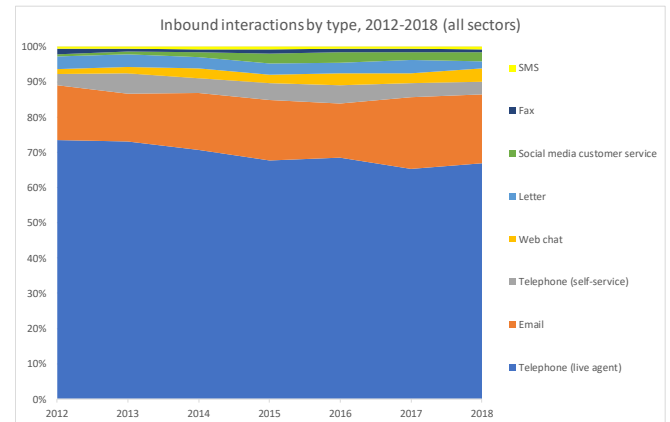
Almost 4% of the UK's working population are employed in contact centres.

The retail & distribution sector has most contact centres (almost 13%), although the finance sector has the most agent positions (18%). Outsourcing & telemarketing, services, public sector, IT, communications and utilities are also important sectors.

The mean average contact centre size is 125 agent positions, with outsourcers, utilities, communications, and finance contact centres having a larger-than-average mean size.

The UK contact centre industry is expected to shed almost 25,000 jobs and see 250 contact centres close over the next 4 years, as a result of automated digital channels, increasing usage of self-service and the expected effects of Brexit.

Outbound calling activity has declined considerably to 19.4%, from 33.7% in 2004, although more service-focused outbound calls are being made.



19.5% of inbound interactions to contact centres are via email.

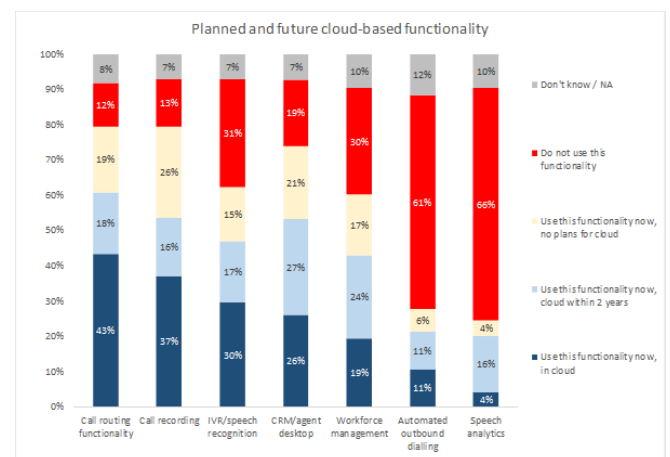
Telephony volumes will decline to around 64% of total contact centre interactions by 2023.

Web chat penetration will grow to 71% by 2023.

27% of businesses using an email management system are looking to replace it.

More than 1 in 4 UK contact centres intend to implement web chat in the next 12 months.

Where used, 60% of call routing functionality is deployed in the cloud.



Report contents:

- 105 charts and data tables show the size, structure and future of your market
- Based on ongoing primary research surveys with thousands of UK contact centres
- Unique historical data from 1995 onwards, with forecasts to the beginning of 2023

Vertical markets covered for market sizing:

- Communications
- Engineering & Construction
- Finance
- Food & Drink
- Housing Associations
- IT
- Manufacturing
- Medical
- Motoring
- Outsourcing & Telemarketing
- Printing and Publishing
- Public Services
- Retail & Distribution
- Services
- Transport & Travel
- Utilities

Size bands:

- 7 size bands (from 10-25 seats to 1,000+ seats)

The report is divided into 8 sections:

Market Sizing

- Measures the number of contact centres and agent positions by:
 - contact centre size band
 - vertical market
 - vertical market within size bands

Geographical Location

- Agent positions by region
- Contact centres by region
- Average contact centre size by region

Employment

- Contact centre employment by vertical market
- Predicted net change in jobs 2018-2022 by vertical market
- Contact centre employment by region
- Employment forecasts by region, 2018-2022
- Employment by contact centre size band
- Likely effects of Brexit on vertical markets and their contact centres

Market Forecasts to the beginning of 2023

- UK contact centres, 1995-2022
- UK agent positions, 1995-2022
- Vertical market forecasts for contact centres and agent positions in 2022
- Drivers for change and the effects of Brexit, by vertical market

Inbound and Outbound Calling

- Outbound activity and agent positions by contact centre size and vertical market
- The role of mobile telephony and legislation on outbound calling

Virtual Contact Centres & Homeworking

- The virtualisation of multisite contact centres
- Benefits & inhibitors to virtualisation
- Current & future use of homeworking

Multichannel Customer Contact

- Contact centre inbound interactions by channel, 2006-2022 (email, voice, self-service, social media, web chat, letters, fax)
- Relative changes in inbound channels

Technology Penetration

- Current use, plans for replacement and planned implementation timescales
- 2018 and 2022 penetration rates
- Segmented by vertical market and contact centre size
- 13 technologies:
 - Automated Speech Recognition
 - DTMF IVR
 - Email Management Systems
 - Gamification
 - In-Queue Call-Back
 - Interaction Analytics
 - Interaction Recording
 - IP Infrastructure
 - Management Information Systems
 - Mobile Customer Service Apps
 - Outbound Dialling
 - Web Chat
 - Workforce Management Systems
- Use of Cloud in 2018

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