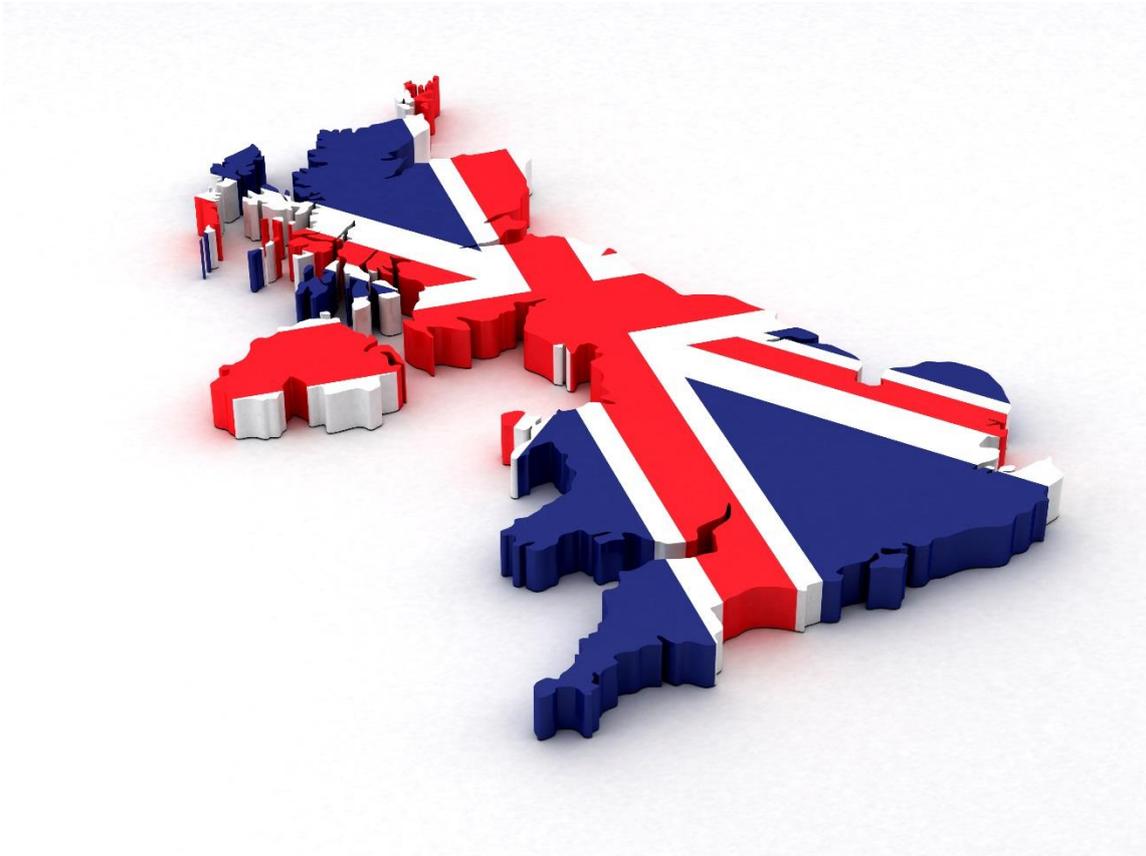




# UK CONTACT CENTRES: 2017-2021

THE STATE OF THE INDUSTRY & TECHNOLOGY PENETRATION  
(14<sup>TH</sup> EDITION)

THE REALITY OF YOUR MARKET TODAY – AND IN THE FUTURE



**Market sizing:** 4,000+ UK operations analysed, with market segments tracked over 14 years

**Detailed segmentation:** 15 vertical markets, 7 size bands, 12 regions

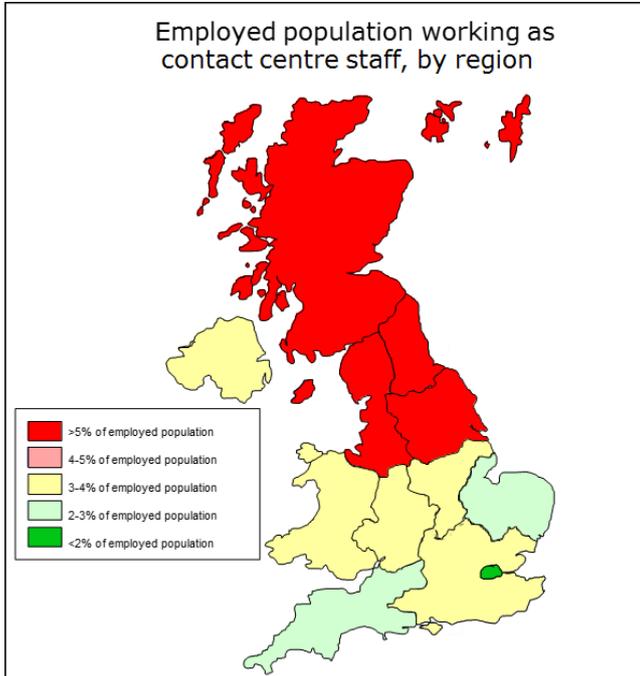
**Forecasts until 2021** for agent positions, contact centres, jobs and technology penetration

**Technology penetration rates:** 16 technologies, by vertical and size band with forecasts

## Key findings

There are 6,225 contact centres in the UK, with 766,000 agent positions.

After the UK contact centre industry's decline in 2009 - both in terms of contact centres and agent positions - 2011 - 2015 saw a steady increase after 2010's tentative growth, with this year seeing a lower rise in headcount and operations.



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

The finance industry is the largest employer, with over 225,000 contact centre jobs in the sector.

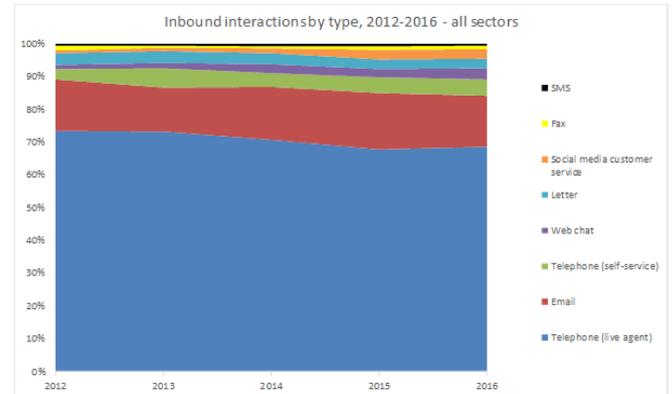
Over 4% of the UK's working population are employed in contact centres.

The retail & distribution sector has most contact centres (around 15%), although the finance sector has the most agent positions (17%). Outsourcing & telemarketing, services, public sector, IT, communications and utilities are also important sectors.

The mean average contact centre size is 123 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 over 32,000 jobs and see 300 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 21.4%, from 33.7% in 2004, although more service-focused outbound calls are being made.



15.5% of inbound interactions to contact centres are via email.

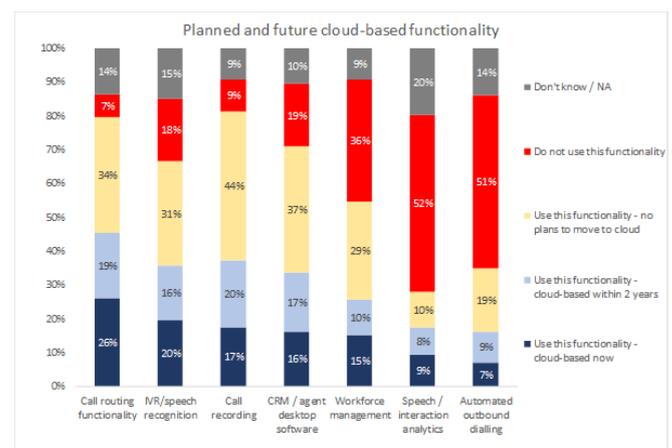
Telephony volumes will decline, being below 64% of total contact centre interactions by 2021.

Mobile customer service app penetration will grow to 62% by 2021.

21% of businesses using an email management system are looking to replace it.

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

Where used, 26% of call routing functionality is deployed in the cloud.



## Report contents:

- 107 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 2021

### Vertical markets covered for market sizing:

- Communications
- Engineering & Construction
- Finance
- Food & Drink
- 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 9 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 2016-2020 by vertical market
- Contact centre employment by region
- Employment forecasts by region, 2016-2020
- Employment by contact centre size band
- Likely effects of Brexit on vertical markets and their contact centres

### Market Forecasts to 2021

- UK contact centres, 1995-2020
- UK agent positions, 1995-2020
- Vertical market forecasts for contact centres and agent positions in 2020
- Drivers for change, 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

### Multisite and Virtual Contact Centres

- The virtualisation of multisite contact centres by contact centre size
- Benefits & inhibitors to virtualisation

### Multichannel Customer Contact

- Contact centre inbound interactions by channel, 2006-2020 (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
- 2016 and 2020 penetration rates
- Segmented by vertical market and contact centre size
- 15 technologies:
  - Automated Speech Recognition
  - DTMF IVR
  - Email Management Systems
  - Gamification
  - Headsets
  - In-Queue Call-Back
  - Interaction Analytics
  - Interaction Recording
  - IP Infrastructure
  - Management Information Systems
  - Mobile Customer Service Apps
  - Outbound Dialling
  - Scripting
  - Web Chat
  - Workforce Management Systems
- Use of Cloud in 2016

**FREE BONUS REPORT: "The 2016 UK Contact Centre Decision-Makers' Guide – 14<sup>th</sup> edition",** the largest in-depth primary research survey of UK contact centres available, looking at technology, business processes and strategy.

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## Options for ordering **UK Contact Centres 2017 - 2021: The State of the Industry & Technology Penetration**

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