



# US CONTACT CENTERS 2017-2021

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

THE REALITY OF YOUR MARKET TODAY – AND IN THE FUTURE



**Market sizing:** by agent positions, contact centers and jobs

**Detailed segmentation:** 12 vertical markets, 6 size bands, by state and division

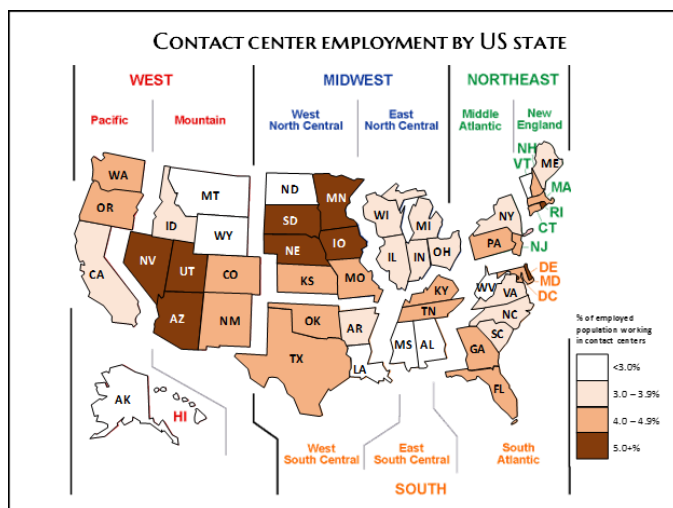
**Forecasts until 2021** for agent positions, contact centers, jobs and technology penetration

**NEW: Technology penetration rates:** 12 technologies, by vertical and size band with forecasts

## Key findings

There are 41,500 contact centers in the US, with over 3.5m agent positions.

After the US contact center industry's decline in 2009/10 - both in terms of contact centers and agent positions - there has been strong growth.



Large contact centers (with over 250 agent positions) employ around 45% of all contact center staff, despite only accounting for less than 7% of physical contact center sites.

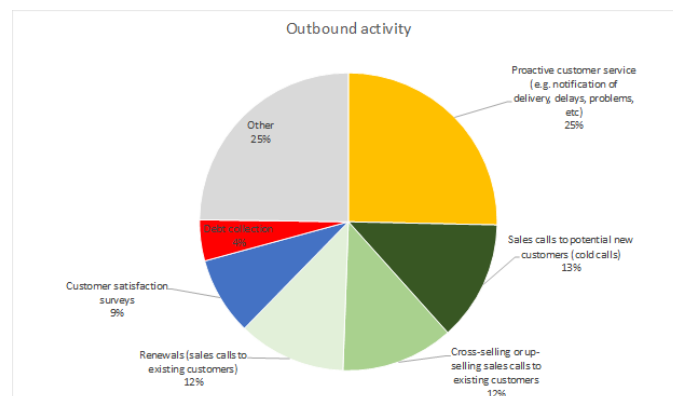
The finance industry is the largest employer, with almost 15% of contact center jobs being in the sector.

Around 4% of the US's employed population work in contact centers.

The retail & distribution sector has most contact centers (16%), although finance, outsourcing & telemarketing, services, public sector, IT, communications and utilities are also important sectors.

The mean average contact center size is 85 agent positions, with outsourcers, utilities, communications, insurance and finance contact centers having larger-than-average mean sizes.

Outbound calling activity has declined considerably to 18%, although more service-focused outbound calls are replacing past sales call volumes.



There were over 230 billion minutes of inbound calling in 2016.

On average, 12.5% of inbound interactions to contact centers are via email.

Social media customer services volumes will grow at a compound annual growth rate of 17% to 2020.

Mobile customer service app penetration will grow to 51% by 2020.

20% of businesses using a workforce management system are looking to replace it.

1 in 9 US contact centers are looking to implement an email management system in the next 12 months.

54% of US contact center operations have some cloud-based functionality.

Vertical market	Use, no plans	Use, replace	<12 months	>12 months	No plans	Don't know	USING NOW
Entertainment & Leisure	66%	0%	0%	0%	11%	23%	66%
Finance	64%	16%	5%	0%	2%	13%	81%
Insurance	83%	0%	0%	0%	2%	15%	83%
Manufacturing	61%	17%	0%	0%	8%	14%	79%
Medical	75%	2%	0%	0%	15%	7%	78%
Outsourcing	75%	14%	1%	2%	4%	4%	89%
Public Sector	65%	13%	0%	0%	9%	13%	78%
Retail & Distribution	43%	20%	11%	13%	0%	13%	63%
Services	71%	7%	2%	0%	6%	13%	78%
TMT	74%	9%	11%	0%	4%	1%	83%
<b>Average</b>	<b>68%</b>	<b>7%</b>	<b>2%</b>	<b>0%</b>	<b>8%</b>	<b>13%</b>	<b>76%</b>

## Report contents:

- 79 charts and data tables show the size, structure and future of your market
- Based on ongoing primary research surveys with thousands of US contact centers
- Unique historical data, with forecasts to 2021

### Vertical markets covered for market sizing:

- Communications
- Finance
- Healthcare
- Insurance
- IT
- Manufacturing
- Outsourcing & Telemarketing
- Public Services
- Retail & Distribution
- Services
- Transport & Travel
- Utilities

### Size bands:

- 6 size bands (11-24 seats to 1,000+ seats)

### The report is divided into 8 sections:

#### Market Sizing

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

#### Geographical Location

- Agent positions by state and division
- Contact centers by state and division

#### Employment

- Contact center employment by vertical market
- Predicted net change in jobs 2016-2020 by vertical market
- Contact center employment by state
- Employment by contact center size

#### Market Forecasts to 2020

- US contact centers, 2004-2020
- US agent positions, 2004-2020
- Vertical market forecasts for contact centers and agent positions in 2020
- Drivers for change, by vertical market

### Inbound and Outbound Calling

- Outbound activity and agent positions by contact center size and vertical market
- Types of outbound activity (cold sales, warm sales, renewals, service, customer surveys, debt collection, etc.)

### Virtual Contact Centers & Homeworking

- The virtualization of multisite contact centers by vertical market
- Effect of virtualization
- Use of homeworking

### Multichannel Customer Contact

- Contact center inbound interactions by channel, 2007-2020 (email, voice, self-service, social media, web chat, letter, fax, etc.)
- Relative changes in inbound channels 2016-2020

### Technology Penetration

- Current technology use, plans for replacement and planned implementation timescales
- 2016 and 2020 penetration rates
- Segmented by vertical market and contact center size
- 12 technologies:
  - Automated Speech Recognition
  - DTMF IVR
  - Email Management Systems
  - Interaction Analytics
  - Interaction Recording
  - IP Infrastructure
  - Management Information Systems
  - Mobile Customer Service Apps
  - Outbound Dialing
  - Web Chat
  - Workforce Management Systems
- Use of Cloud in 2016 and expected 2018 usage for 7 technologies

**FREE BONUS REPORT: "The 2017 US Contact Center Decision-Makers' Guide"**, the largest in-depth primary research survey of US contact centers available, looking at technology, business processes and strategy.

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