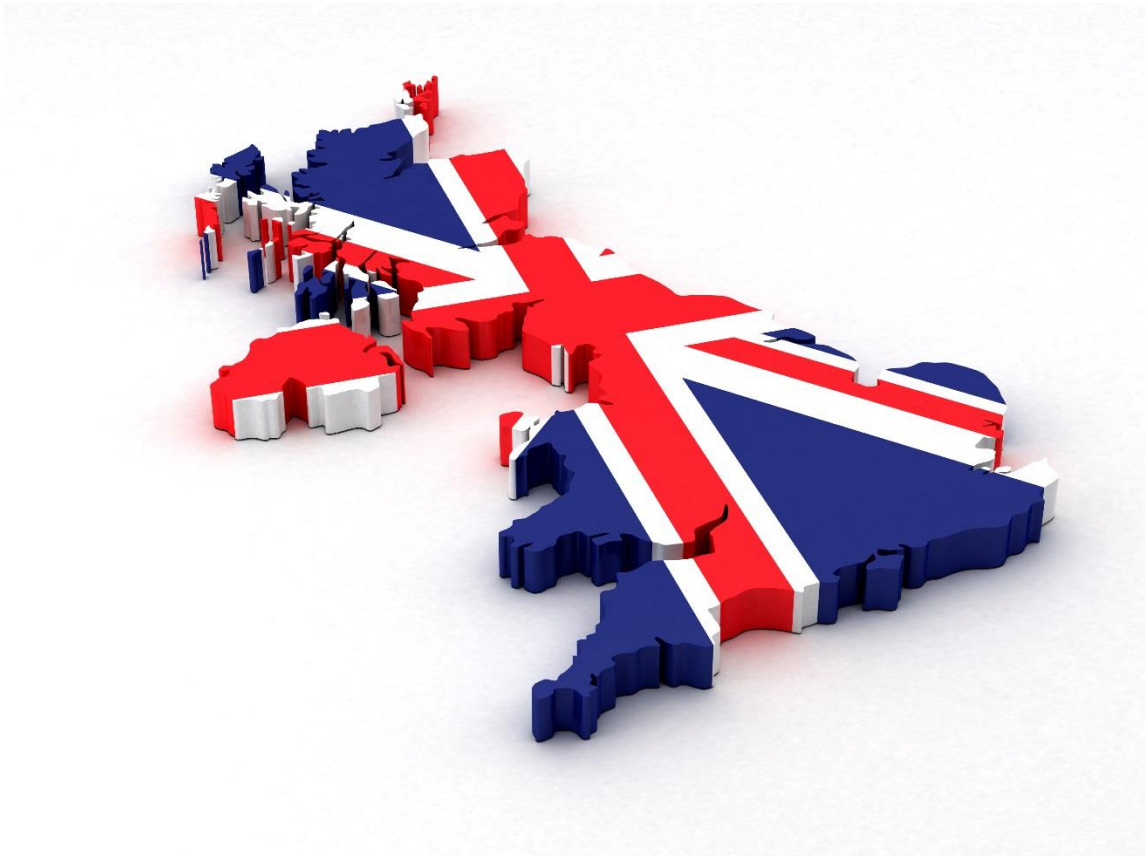




# UK Contact Centres: 2019-2023

The State of the Industry & Technology Penetration  
(16<sup>th</sup> 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

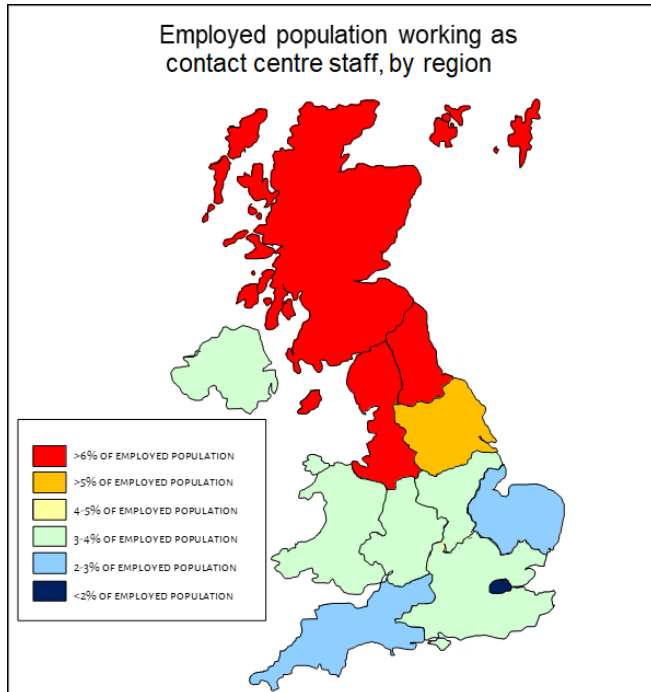
**Forecasts until 2023** for agent positions, contact centres, jobs and technology penetration

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

## 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.

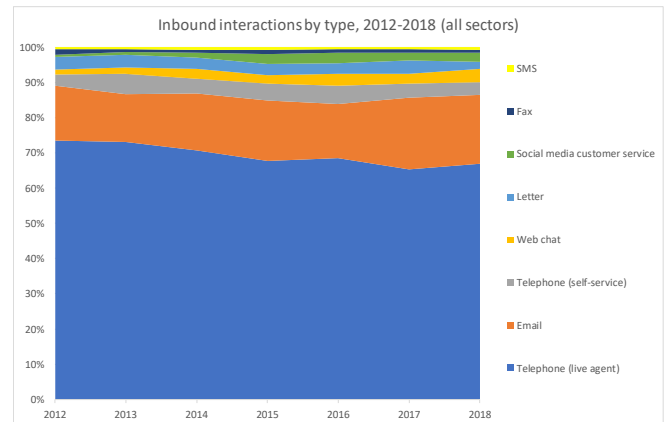
Almost 4% of the UK's working population are employed in contact centres.

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.

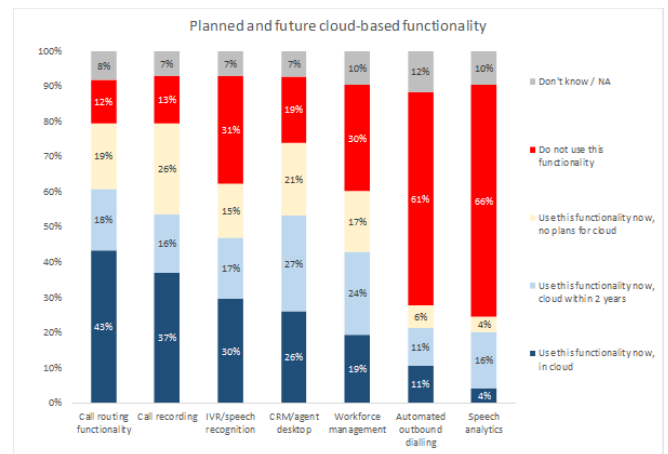
Telephony volumes will decline to around 64% of total contact centre interactions by 2023.

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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