



US CONTACT CENTERS IN 2015:

THE STATE OF THE INDUSTRY & TECHNOLOGY PENETRATION
(3RD 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, 7 size bands, by state and division

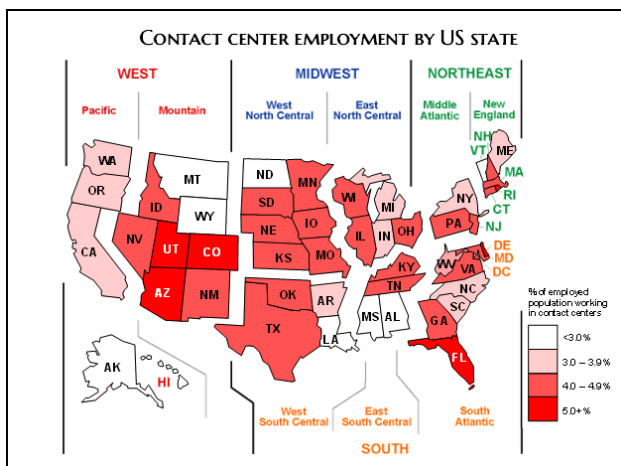
Forecasts until 2018 for agent positions, contact centers, jobs and technology penetration

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

Key findings

There are around 44,000 contact centers in the US, with over 3,4m 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 almost half of all contact center staff, despite only accounting for less than 10% of physical contact center sites.

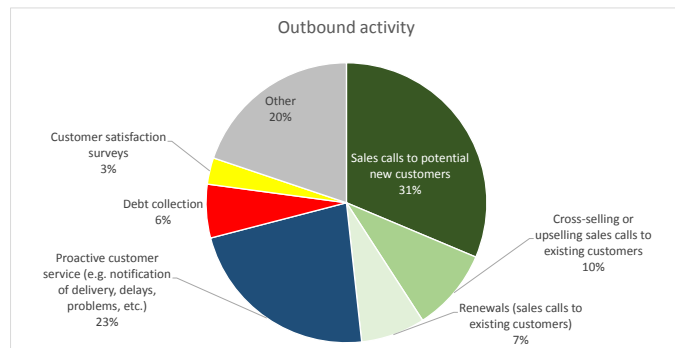
The finance industry is the largest employer, with around 15% of contact center jobs being in the sector.

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

The retail & distribution sector has most contact centers (16%), although the finance sector has the most agent positions (15%). Outsourcing & telemarketing, services, public sector, IT, communications and utilities are also important sectors.

The mean average contact center size is 79 agent positions, with outsourcers, utilities, communications, insurance and finance contact centers having larger-than-average mean sizes.

Outbound calling activity has declined considerably to 23.7%, although more service-focused outbound calls are replacing past sales call volumes.



There were over 200 billion minutes of inbound calling in 2014.

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

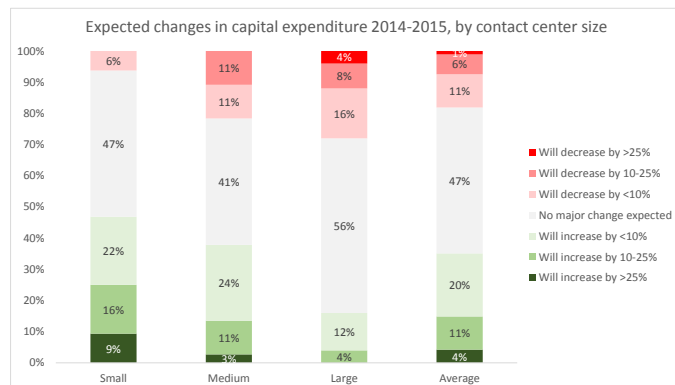
Web chat volumes will grow at a compound annual growth rate of 21% to 2018.

Mobile customer service app penetration will grow to 49% by 2018.

22% of businesses using a workforce management system are looking to replace it.

1 in 11 US contact centers are looking to implement interaction analytics in the next 12 months.

Where used, 31% of CRM/agent desktop software functionality is deployed in the cloud.



Large operations are under the greatest pressure to reduce their costs with 28% expecting to cut their capital expenditure.

Report contents:

- 92 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 2018

Vertical markets covered for market sizing:

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

Size bands:

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

The report is divided into 9 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 2014-2018 by vertical market
- Contact center employment by state
- Employment by contact center size

Market Forecasts to 2018

- UK contact centers, 1995-2018
- UK agent positions, 1995-2018
- Vertical market forecasts for contact centers and agent positions in 2018
- Drivers for change, by vertical market

Inbound and Outbound Calling

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

Multisite and Virtual Contact Centers

- The virtualization of multisite contact centers by contact center size
- Effect of virtualization
- Use of homeworking

Multichannel Customer Contact

- Contact center inbound interactions by channel, 2006-2018 (email, voice, self-service, social media, web chat, letter, fax, etc.)
- Relative changes in inbound channels

Technology Penetration

- Current use, plans for replacement and planned implementation timescales
- 2014 and 2018 penetration rates
- Segmented by vertical market and contact center size
- 13 technologies:
 - Automated Speech Recognition
 - DTMF IVR
 - Email Management Systems
 - Headsets
 - In-Queue Call-Back
 - Interaction Analytics
 - Interaction Recording
 - IP Infrastructure
 - Management Information Systems
 - Mobile Customer Service Apps
 - Outbound Dialing
 - Web Chat
 - Workforce Management Systems
- Use of Cloud in 2014

Contact Center Strategy & Investment Trends

- Changes in Capex and Opex expenditure, by contact center size, 2014-15.

FREE BONUS REPORT: "The 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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