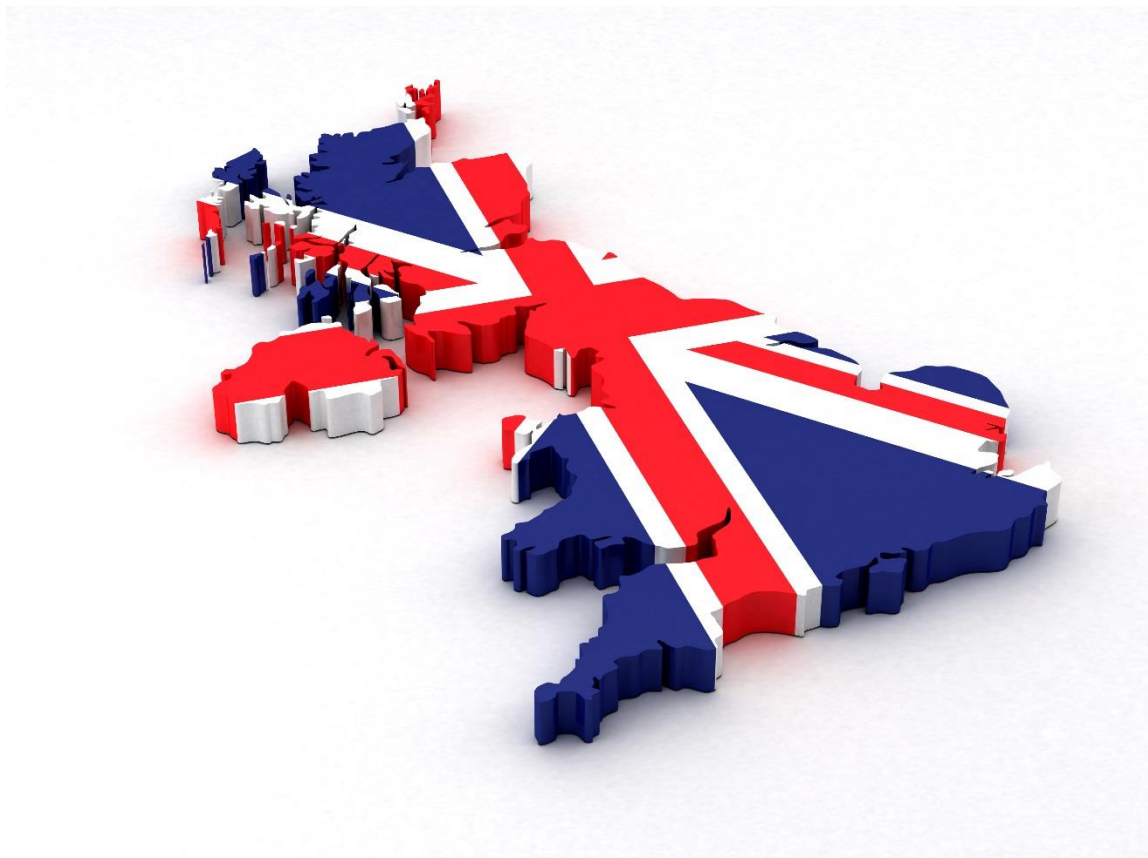




UK CONTACT CENTRES IN 2015:

THE STATE OF THE INDUSTRY & TECHNOLOGY PENETRATION
(12TH EDITION)

THE REALITY OF YOUR MARKET TODAY - AND IN THE FUTURE



Market sizing: 4,000+ UK operations analysed, with market segments tracked over 12 years

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

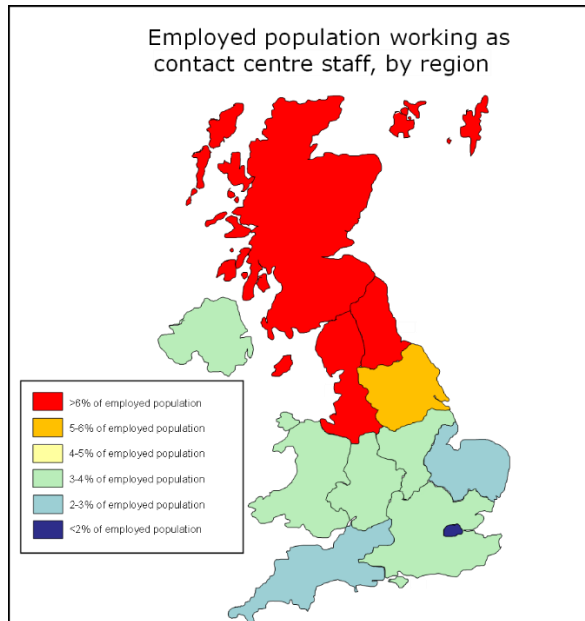
Forecasts until 2018 for agent positions, contact centres, jobs and technology penetration

NEW: Technology penetration rates: 15 technologies, by vertical and size band with forecasts

Key findings

There are 5,840 contact centres in the UK, with 734,000 agent positions.

After the UK contact centre industry's decline in 2009 - both in terms of contact centres and agent positions - 2011 - 2013 saw a continued gentle increase after 2010's tentative growth, with this year seeing more significant increase in headcount and the number of 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.

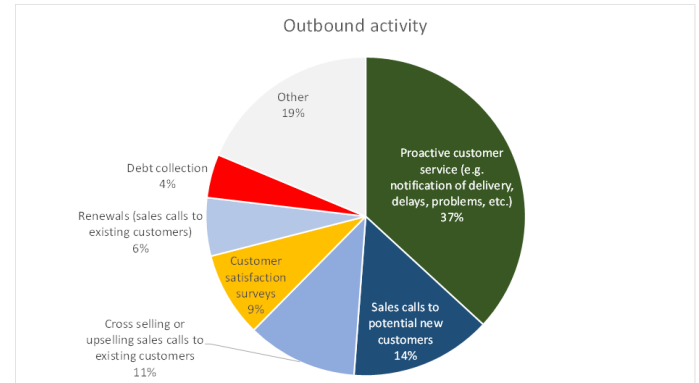
The finance industry is the largest employer, with over 212,000 contact centre jobs in the sector.

3.98% of the UK's working population are employed in contact centres.

The retail & distribution sector has most contact centres (16%), 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 126 agent positions, with outsourcers, utilities, communications, and finance contact centres having a larger-than-average mean size.

Outbound calling activity has declined considerably to 21.7%, from 33.7% in 2004, although more service-focused outbound calls are being made.



There were over 42 billion minutes of inbound calling in 2014.

16.4% of inbound interactions to contact centres are via email.

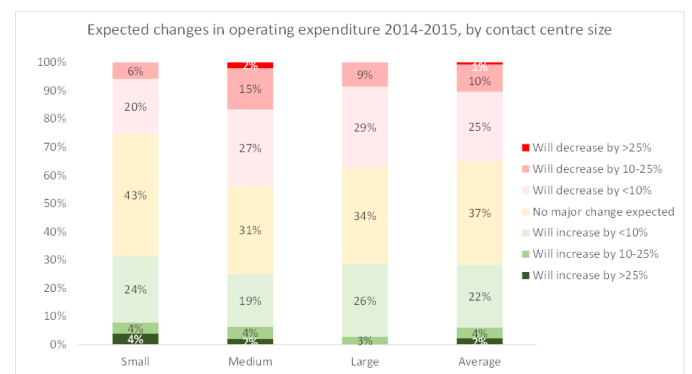
Web chat volumes will grow at a compound annual growth rate of 24% to 2018.

Mobile customer service app penetration will grow to 40% by 2018.

24% of businesses using a workforce management system are looking to replace it.

1 in 8 UK contact centres are looking to implement interaction analytics in the next 12 months.

Where used, 24% of call routing functionality is deployed in the cloud.



Medium-sized operations will be under the greatest pressure to reduce their ongoing costs in 2014-15, with 44% expecting to cut their operating expenditure.

Report contents:

- 95 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 2018

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 (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 2014-2018 by vertical market
- Contact centre employment by region
- Employment forecasts by region, 2014-2018
- Employment by contact centre size

Market Forecasts to 2018

- UK contact centres, 1995-2018
- UK agent positions, 1995-2018

- Vertical market forecasts for contact centres and agent positions in 2018
- 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, 2006-2018 (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 centre size
- 14 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 Dialling
 - Scripting
 - Web Chat
 - Workforce Management Systems
- Use of Cloud in 2014

Contact Centre Strategy & Investment Trends

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

FREE BONUS REPORT: "The 2014 UK Contact Centre Decision-Makers' Guide – 12th edition", the largest in-depth primary research survey of UK contact centres available, looking at technology, business processes and strategy.

Options for ordering **UK Contact Centres in 2015: The State of the Industry & Technology Penetration**

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