CONTACTBABEL

US Contact Centers 2021-2025

The State of the Industry & Technology Penetration
(8th 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 2025 for agent positions, contact centers, jobs and technology penetration

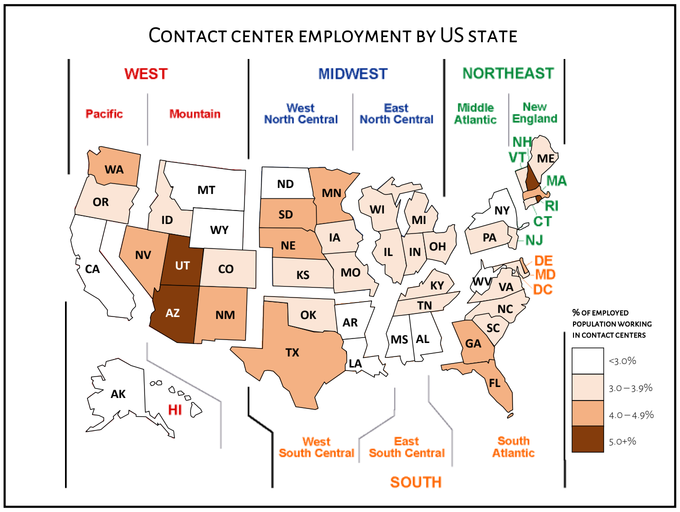
Technology penetration rates: 13 technologies, by vertical and size band with forecasts

Published February 2021

Key findings

There are 39,350 contact centers in the US, with over 3.7m agent positions.

Although a difficult year for many reasons, 2020 saw an increase in contact center headcount, with 51% of survey respondents reporting increases. There have been massive rises in demand for customer contact, particularly in retail, finance, public sector and transport & travel.



Large contact centers (with over 250 agent positions) employ around 45% of all contact center staff, despite only accounting for 6% of physical contact center sites.

The outsourcing industry is the largest employer, with 16% of contact center jobs being in the sector.

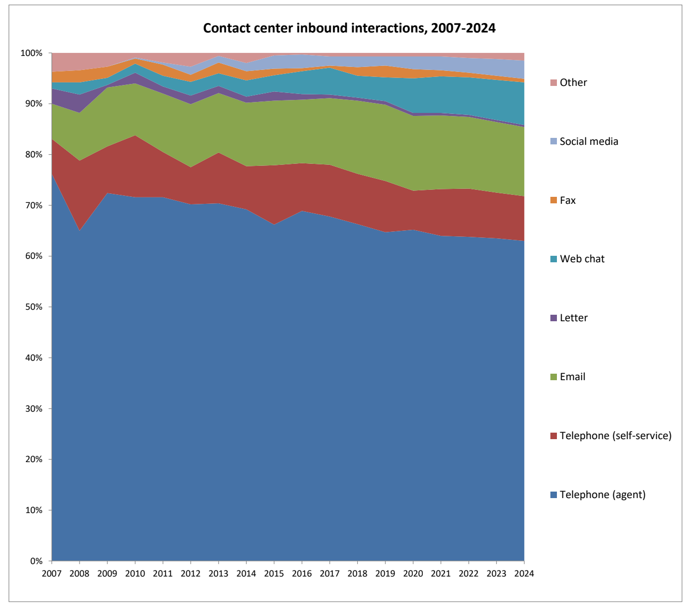
Around 3.6% of the US's employed population work in contact centers.

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

The mean average contact center size is 95 agent positions, with outsourcers, communications and finance contact centers having larger-than-average mean sizes.

On average, 15% of inbound interactions to contact centers are via email.

Social media customer contact volumes will grow at a compound annual growth rate of 10% to 2025.

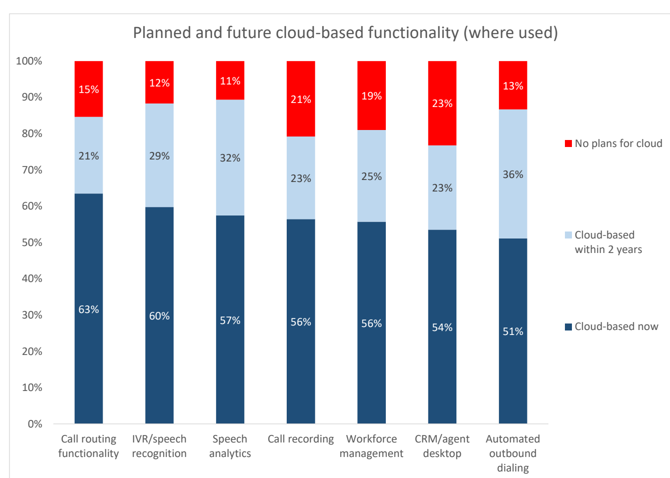


Outbound calling activity has declined considerably to 16%, although more service-focused outbound calls are replacing past sales call volumes.

30% of businesses using interaction analytics are looking to replace or upgrade it.

More than 1 in 5 US contact centers are looking to implement web chat within the next 12 months.

More than half of US contact center operations have some cloud-based contact center functionality.



Report contents:

- 102 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 the beginning of 2025

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 2021-2025 by vertical market
- Contact center employment by state
- Employment by contact center size

Market Forecasts to 2025

- US contact centers, 2004-2025
- US agent positions, 2004-2025
- Vertical market forecasts for contact centers and agent positions in 2025
- 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, 2007-2024 (email, voice, self-service, social media, web chat, letter, fax, etc.)
- Relative changes in inbound channels 2007-2024
- Multichannel usage by vertical market 2016-20

Technology Penetration

- Current technology use, plans for replacement and planned implementation timescales
- End-2020 and end-2024 penetration rates
- Segmented by vertical market and contact center size
- 13 technologies:
  - Artificial Intelligence
  - Automated Speech Recognition
  - DTMF IVR
  - Email Management Systems
  - Gamification
  - Interaction Analytics
  - Interaction Recording
  - IP Infrastructure
  - Management Information Systems
  - Mobile Customer Service Apps
  - Outbound Dialing
  - Web Chat
  - Workforce Management Systems
- Use of Cloud in 2020 and expected 2022 cloud usage for 7 technologies

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