

# Estudo de Caracterização e Benchmarking

ATIVIDADE DE CONTACT CENTERS

2020

apcc   
associação  
portuguesa de  
contact centers



an NTT DATA Company



# Characterization and Benchmarking Study

Contact Centers' Activity

2020

## **INDEX**

<b>Preface</b>	<b>2</b>
<b>Methodological Note</b>	<b>2</b>
<b>Executive Summary</b>	<b>3</b>
<b>1. Characterization</b>	<b>7</b>
<b>2. Operational Performance</b>	<b>14</b>
<b>3. Human Resources</b>	<b>29</b>
<b>4. Policies and Benefits</b>	<b>49</b>
<b>5. Resort to Outsourcing</b>	<b>53</b>
<b>6. Technology</b>	<b>57</b>
<b>7. Continuous Improvement</b>	<b>69</b>
<b>8. Financial Data</b>	<b>76</b>

## Preface

The Characterization and Benchmarking study is one of the most important initiatives of the APCC. Conducted annually, the study progressed over 15 years until it became the main source of information, rigorous, detailed and clearly representative of Contact Center's activity in Portugal and the best support to confront the unfair appraisals of some media.

In its various dimensions, this tool allows economic agents that work in our Industry:

- Know the characterization of the sector, in its national dispersion and in the global dimensions;
- Understand the behavior of the main operational performance indicators:
- Monitor the quantitative evolution of the sector's human resources, as well as remuneration policies and benefits;
- Understand the main trends and options of companies in this Industry in their technological options and in resort to outsourcing;
- Understand the means of continuous improvement most adopted in the constant search for performance excellence;
- Have a view of the financial data of the companies in the sector.

The 2020 edition of the study, compiling data from 2019, registered an unprecedented number of participants, revealing the interest that this instrument has for our industry: the 722 responding service lines made modest the 143 that occurred last year, which had been the largest number ever registered.

APCC should be grateful for the availability of the responding companies, especially their associates. Only this availability and the competent and rigorous performance of everis made this remarkable edition possible.

Ana Gonçalves

Secretary General

## Methodological note

A total of 722 service lines responded to this year's study, operated by 51 companies from different sectors of activity. This represents a very significant increase compared to the volume of responses to the studies of previous years (2017 - 89 lines; 2018 - 143 lines).

In this way, this year's edition of the study is even more representative of the Contact Centers sector in Portugal, mirroring the reality of this Industry more reliably.

The study maintains the structure used in previous years, focusing on the profile, operational performance, policies and benefits of employees, as well as in an attempt to identify the main trends related to technological innovation in the sector.

It is intended that this study continues to be regarded as a tool for analysis and a support in decision making for the organizations operating in the sector.

Following the method used in previous editions of the study, the information collected is presented according to 3 dimensions: global analysis, analysis by economic sector and finally, analysis per Contact Center service line. The data treatment follows robust mathematical methodologies that ensure the correct data determination for the 3 dimensions mentioned.

The analysis of the average results of 2019 should take into account the potential impact caused by the significant difference in the number of lines that responded.

Finally, on behalf of APCC and everis, we would like to extend our sincere thanks to all the organizations that participated in this study and to their representatives for their commitment and cooperation with this initiative.

## Executive Summary 2020

### **Introduction and Framing of the Characterization and Benchmarking Study**

The Portuguese Association of Contact Centers (APCC), in partnership with everis, performs this year the 15th edition of the Characterization and Benchmarking Study. The study aims to analyze the evolution of the main indicators of the Contact Center sector and to present behaviors and trends at national level.

We highlight the vital participation of 722 service lines, constituting a sample approximately 5 times larger than that observed in 2018. This ensures a significant representativeness of the sector in Portugal and reflects the importance that the study has acquired as a way of characterizing and analyzing the evolution in the sector compared to previous years, being also considered as a decision support tool.

This year's Study continues, as in previous years, to reflect the update of the main practices / technologies of the Contact Centers.

### **Current situation of Contact Center activity**

#### **Sample Characterization**

Compared to last year, the geographic distribution of the Contact Centers remains very similar, noticing, however, an increase in the centralization of operations in Lisbon (47.2% in 2019 compared to 42.5% in the previous year).

In Portugal, Customer Service continues to be the most representative Contact Center function, provided by 84% of respondents (representing an increase of 8 percentage points compared to 2018), followed by Back office activities (44%) and Cross Selling and Upselling / Inbound Sales (42%).

With regard to the distribution by sector of the sample, the Contact Centers activity in Portugal appears to be dominated essentially by Outsourcing Companies (22% of the sample, compared to 16% in 2018), accounting for about 70% of the total FTEs of the sample considered.

Insurance companies (16%) and Banks and other Financial Institutions (16%) appear after Outsourcers as prevalent sectors of activity in this year's study.

### **Operational Performance**

Compared to 2018, it was possible to determine the improvement of some operational performance indicators in the Contact Centers, specifically:

- A reduction in the waiting time to be serviced by the Contact Center from 64 seconds to 49 seconds;
- A significant decrease in the average time to resolve requests (excluding complaints) from 19.8 hours to 11.92 hours;
- An increase in the resolution rate at the first contact from 84% to 87%;
- An increase in the percentage of successful sales on Outbound calls from 19% to 30%.
- An increase in the average number of calls answered per Operator per hour from 8.5 calls / hour to 9.5.

In contrast, there were some indicators that showed a decline in relation to the previous year, at the operational level, namely:

- An increase in the "time on hold" from 49 seconds to 59 seconds;
- A significant increase in the average time to resolve complaints from 1.4 days to 2.95 days.
- A decrease in the success percentage of Outbound retention calls from 33% to 27%.

### **Human Resources**

In this year's study, it was possible to verify that 85% of the respondents carry out satisfaction surveys on their employees, with the majority being collected on an annual basis (67%). The average rating obtained in these surveys rose slightly, from 74% to 76%.

The rotation rate for Operators and Supervisors increased compared to last year, from 30% to 33% and from 9% to 12%, respectively. This increase justifies the decrease in the average seniority of these workers (from 48 to 35 months for Operators and from 87 to 68 for Supervisors).

Contrary to what occurred in 2018, the percentage of employees with an effective contract decreased slightly, from 49% to 46%, term contracts showed an increase from 41% to 45% and also temporary employees from 7% to 8%. On the other hand, the percentage of employees under the green receipt regime decreased from 3% to 1%.

### **Policies and Benefits**

In 2019, the Operators average monthly gross salary rose slightly compared to last year (increased by 1.23%), to 806€. The sectors that registered the highest average monthly remuneration were Mail and Express Distribution (1,100€), Banks and Financial Institutions (880€) and Travel Assistance (851€). On the other hand, the lowest average amounts were registered in Health (664€), Tourism (690€) and Commerce (693€). These values correspond only to the basic remuneration and do not take into account the associated variable component.

In the same period, the Supervisors gross monthly average salary increased by 2.97% in relation to the previous year, standing at 1,075€. This figure is 33.42% higher than that of

Operators. The sectors with higher average salaries were Mail and Express Distribution (1,500€), Banks and Financial Institutions (1,110€) and Commerce (1,092€), while the lowest values were found in the Health (835€), Tourism (835€) and Utilities (916€) sectors.

### **Resort to Outsourcing**

The percentage of Companies that resort to, and plan to continue to hire, Outsourcing Companies, decreased compared to 2018, from 78% to 73%. As for reasons that lead organizations to contract outsourcing services, the need for specific skills (83%) and cost savings (66%), remain at the top of the list.

The services contracted in the outsourcing model continue to be mainly for Operators (68%), Supervisors (61%) and Quality Experts (50%), being the predominant remuneration models, similar to what was observed in the previous study, the models "per hour"(48.65%), "per call attended" (37.84%) and "by human resource cost "(35.14%).

### **Technology**

The technological solutions predominantly used in the Contact Centers activity are the Automatic Distribution System for incoming calls (87%), Voice Recording Solution (87%) and Integrated Telephone-Computer System (which identifies the caller) (85%), it is also worth noticing the increase in Web Chats from 14% to 20% and a reduction in the use of Self-Care tools for customers from 54% to 47%.

With regard to betting on new channels, 42% of respondents plan to invest in making Web Chats available to their customers.

When asked about the reasons for offering Self-Care channels, 98% of respondents answered "improving the customer experience", remaining as the main focus in the development of this solution. The biggest challenges for establishing these channels continues to be the difficulty of integrating systems (61%) and implementation costs (50%).

There was even greater urgency in the need to evolve the Contact Center to a cloud model compared to 2018, demonstrated by the significant decrease in the percentage of companies that planned to invest over a period of more than three years (from 18% to 2%), followed by a significant increase in respondents who plan to invest in the change to the cloud model in 2020 (from 35% to 52%).

Unlike cloud technology, in 2019 there was a decrease in the percentage of respondents who do not own but plan to invest in RPA technology (from 57% to 46%), followed by an increase in the percentage of respondents who do not plan to invest in RPA (increased from 8% to 15%).

In relation to Artificial Intelligence solutions, 35% of the sample has this technology, with an increase in the percentage of respondents who do not have this solution but plan to invest in 2020 (from 27% to 39%).

Regarding customer experience, there was a decrease in the percentage of respondents who invest in this type of projects (from 81% to 73%).

Finally, the percentage of companies that use Speech to Text solutions almost doubled compared to last year (from 14% to 27%).

## **Continuous Improvement**

With regard to continuous improvement, the percentage of respondents who conduct customer satisfaction surveys has decreased significantly compared to 2018 (from 94% to 79%), the average percentage of calls being evaluated by the customer also decreased (from 22% to 18%). Regarding the average rating obtained in those same surveys, there was an increase from 79% to 82% in relation to the previous year.

## **Conclusion**

The results of this year's study demonstrate an improvement in operational performance indicators, which is expected to translate into an improvement in the quality of customer service. In terms of Contact Center employees, there was an improvement in the results of the satisfaction surveys carried out and a slight increase in average salaries, both for Operators and Supervisors. However, it was also possible to determine an increase in the rotation rate of employees, followed by a decrease in their average seniority.

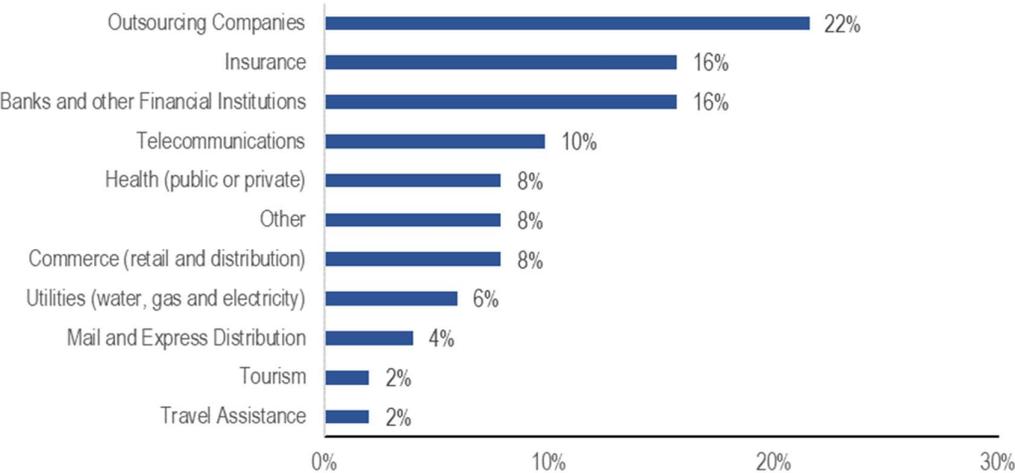
Regarding the bet on technological innovations, the growing bet on Cloud and Speech to Text solutions stands out. It was also possible to observe a growing trend towards the adoption of Self-Care solutions, namely Web Chats, in the near future, aiming to improve the customer experience.

# 1 Characterization

**QUESTION: What is the economy sector in which the company operates?**

COMMENT: The 2019 Characterization and Benchmarking Study was mainly answered by Outsourcing Companies (22%), Banks and other Financial Institutions (16%), Insurance Companies (16%), Telecommunications (10%), Health (8%) and Commerce (8%).

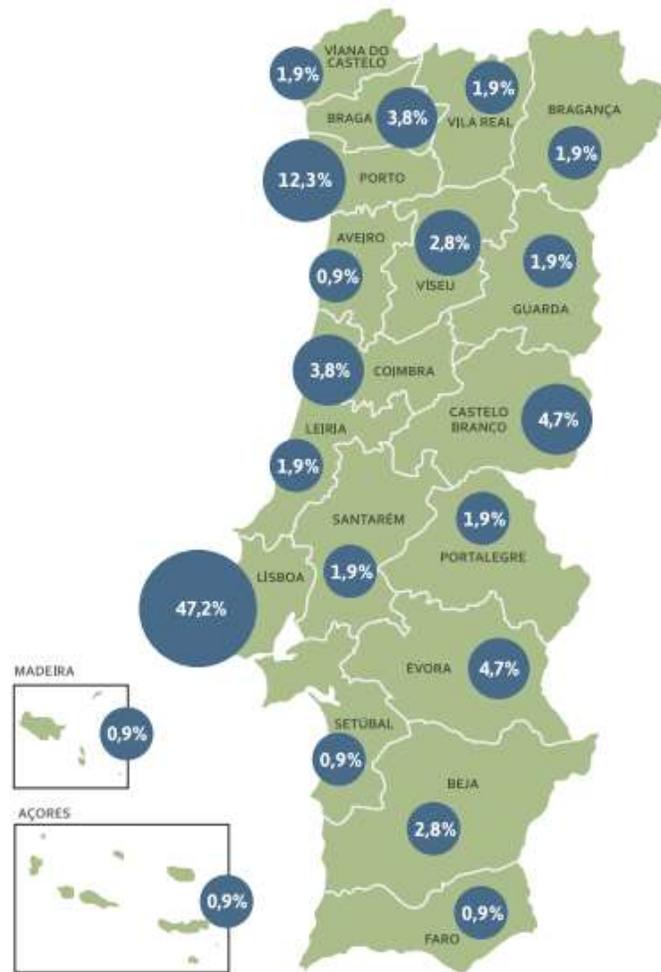
FIGURE 1  
**SECTOR OF ACTIVITY (N = 722)**



QUESTION: In which district is the Contact Center located?

COMMENT: Compared to last year, the geographic distribution of Contact Centers remains very similar, noticing, however, an increase in the centralization of operations in Lisbon (47.2% in 2019 compared to 42.5% in the previous year). Porto, the second most represented district, slightly decreased its percentage (12.3% in 2019 against 12.5% in 2018). After Lisbon and Porto, the most represented districts are Castelo Branco (4.7%), Évora (4.7%), Braga (3.8%) and Coimbra (3.8%).

FIGURE 2  
DISTRIBUTION OF CENTERS BY LOCATION (N=722)

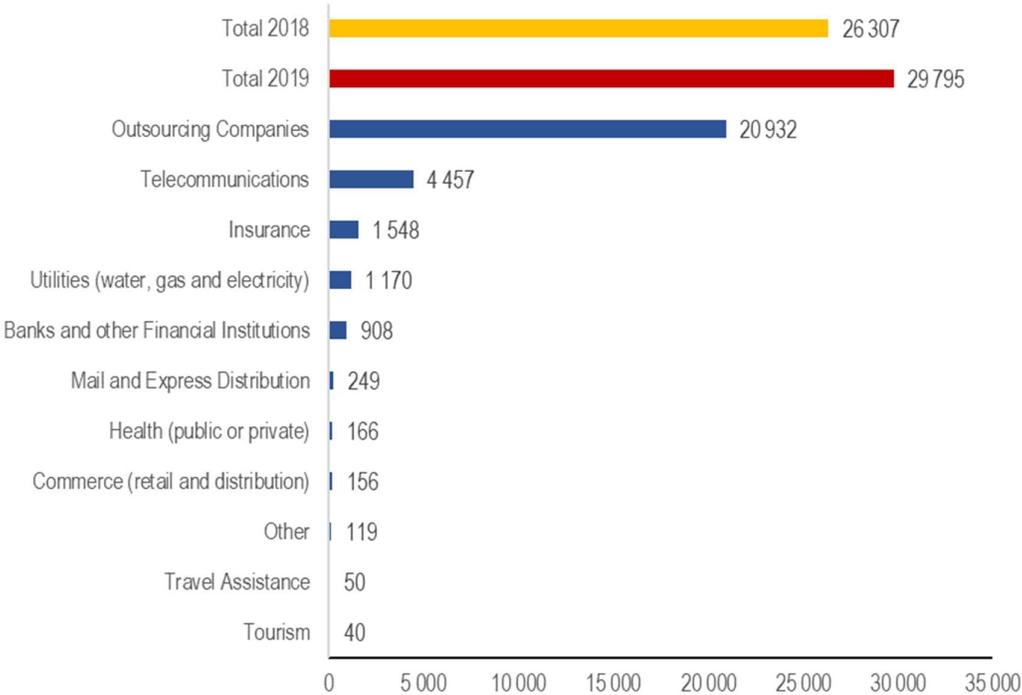


QUESTION: What is the number of service positions in the Contact Center?

COMMENT: In 2019 the number of service positions grew approximately 13% over the previous year, to 29,795. The most prevalent sectors continue to be Outsourcing Companies (20,932) and Telecommunications (4,457), maintaining a distribution similar to that observed in 2018.

Figure 3

**NUMBER OF SERVICE POSITIONS IN THE CONTACT CENTER (N=719)**

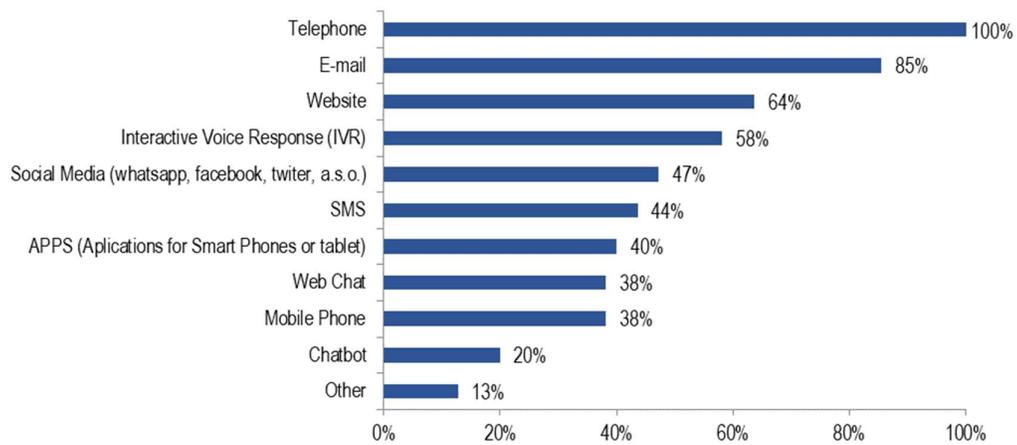


QUESTION: Which channels are made available to the customers?

COMMENT: As in 2018, all study participants use the telephone as a mean of contact. However, there was a significant decrease in the use of other means such as E-mail (85% instead of 95%), Website (64% instead of 82%), IVR (58% instead of 76%), Mobile phone (38% instead of 63%), Social Media (47% instead of 63%) and APPS (40% instead of 68%). It is also important to note that 20% of the sample makes Web Chat available as a service channel.

Figure 4

**CHANNELS MADE AVAILABLE TO CUSTOMERS (N=722)**



QUESTION: What are the total human resources allocated to Contact Center operations? Indicate the number of Operators, the number of Supervisors and the total number of Support Staff.

COMMENT: The distribution of human resources allocated to Contact Center operations remained very similar in relation to 2018 (approximately 5% Support Staff, 7% Supervisors and 88% Operators). The total number of employees increased by 11% compared to 2018 (41,812 instead of 37,583), which can be partly explained by the increase in the number of responses to the study. The ratios between Operators and Support Staff or Supervisors remained virtually unchanged.

Figure 5

**TOTAL HUMAN RESOURCES OF OPERATIONS UNDER STUDY (N=722)**

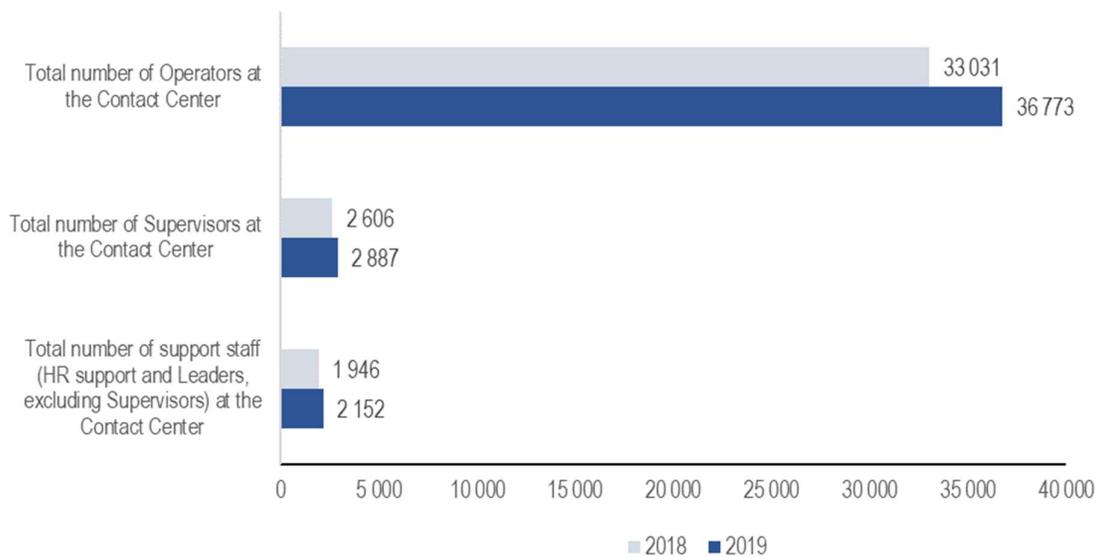
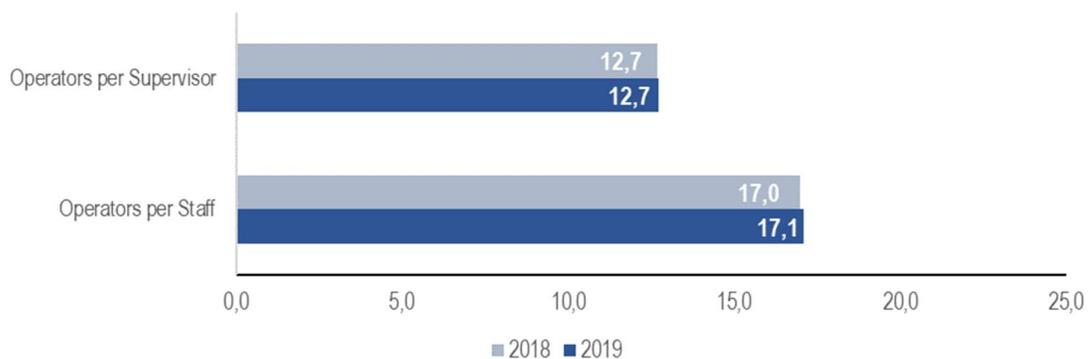


Figure 6

**HUMAN RESOURCES RATIO OF OPERATIONS UNDER STUDY (N=722)**

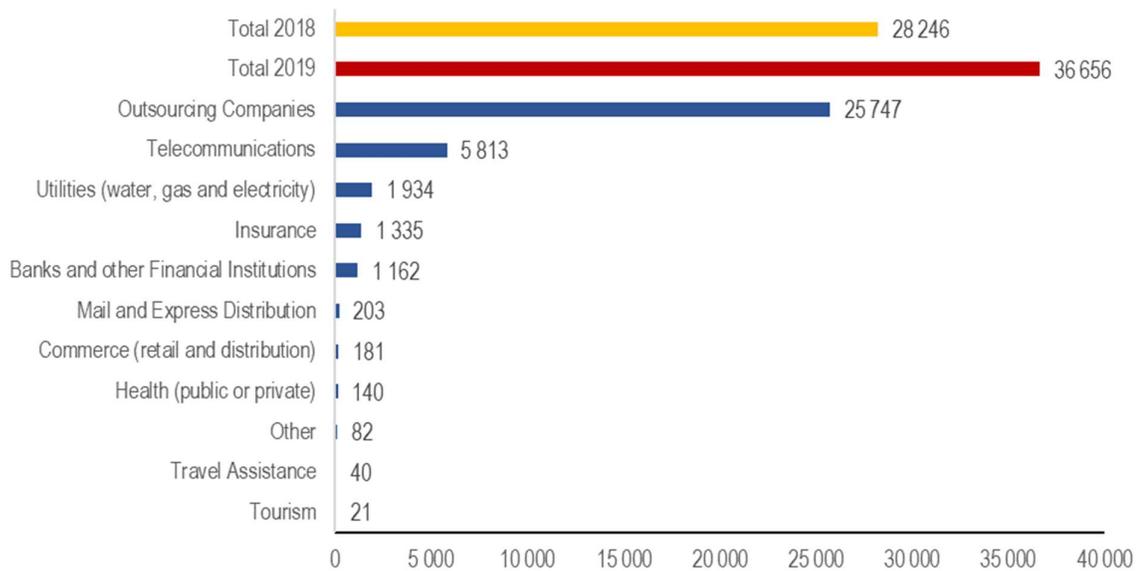


QUESTION: What is the average number of Full Time Equivalents, in 2019, allocated to Inbound and Outbound?

COMMENT: The total number of FTE in the sample increased by about 30% compared to 2018 (36,656 instead of 28,246), and this increase should be interpreted taking into account the increase in the number of responses to this year's study. The 3 sectors with the highest number of Full Time Equivalents remained in relation to 2018: Outsourcing Companies (25,747), Telecommunications (5,813) and Utilities (1,934). It should be noted that the increase in FTEs is almost three times the increase in resources, which will allow us to conclude that there was an increase in workloads to eventually compensate for difficulties in new recruitments.

Figure 7

**NUMBER OF FULL TIME EQUIVALENTS (N=718)**

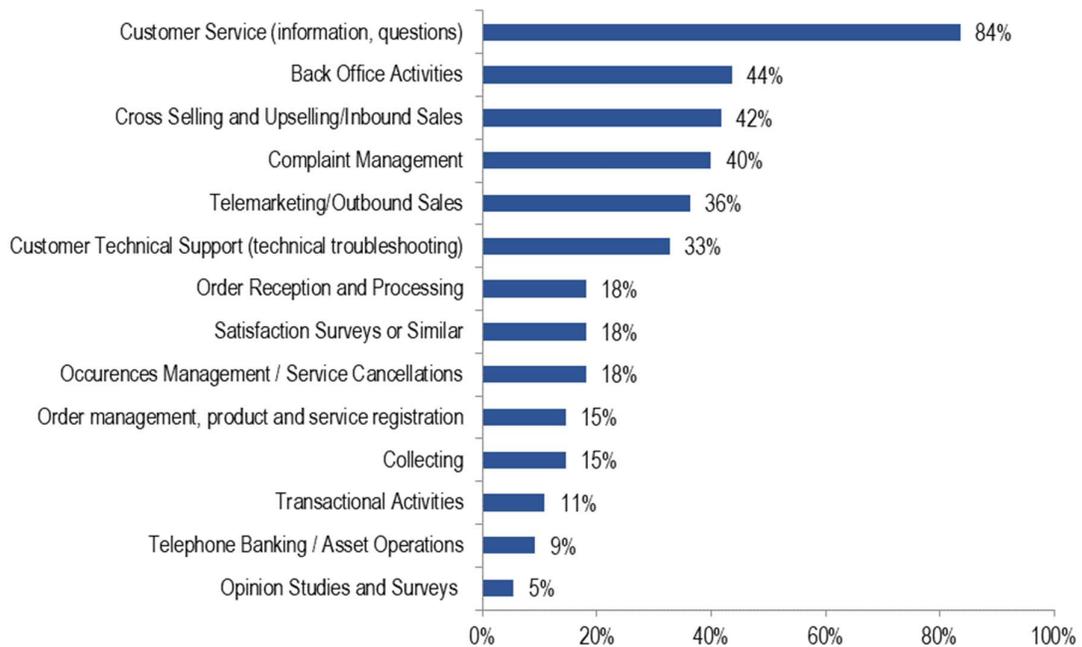


QUESTION: What are the main functions of the Contact Center?

COMMENT: The main function of the Contact Centers in the sample continues to be Customer Service (84%), followed by Back Office Activities (44%), Cross Selling and Upselling / Inbound Sales (42%), Complaints Management (40%) and Telemarketing / Outbound Sales (36%). It is important to note the significant increase in Cross Selling and Upselling / Inbound Sales and Technical Customer Support, which rose from 13% to 42% and from 11% to 33%, respectively, and the significant drop in Order Management and in product registration and services, from 34% to 15% in 2019.

Figure 8

**WHAT ARE THE MAIN FUNCTIONS OF THE CONTACT CENTER? (N=722)**



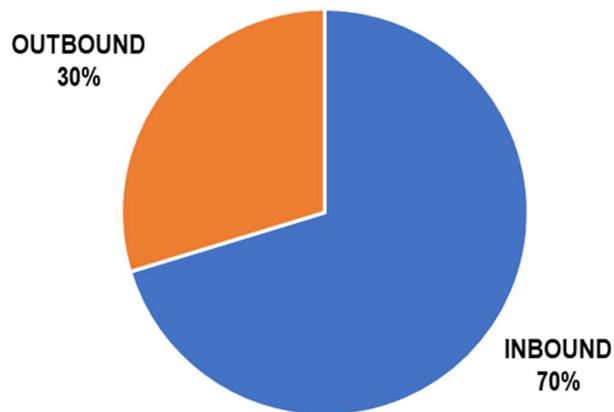
## 2 Operational Performance

QUESTION: What is the distribution of contacts by nature of interaction (Inbound vs. Outbound, in percentage)?

COMMENT: Although Inbound contacts continue to maintain their predominance, making up 70% of contacts, compared to the previous year, there was an increase of 10 percentage points in the percentage of Outbound contacts (from 20% to 30%).

Figure 9

**INBOUND VS. OUTBOUND CONTACTS (N=722)**

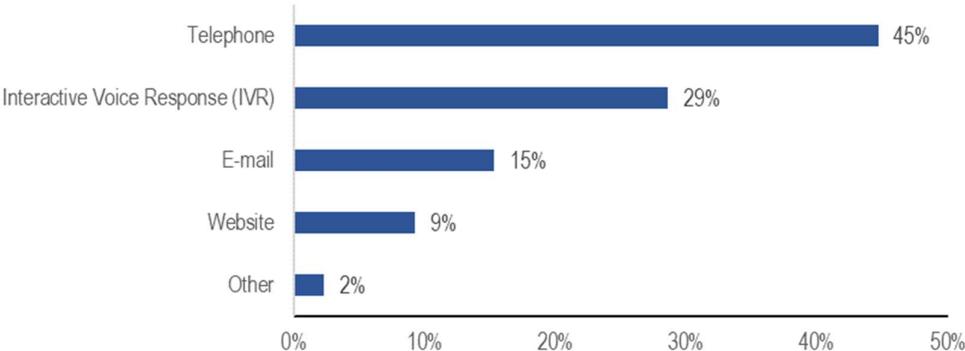


QUESTION: What is the average number of contacts, of Inbound nature, per channel, per day?

COMMENT: In the universe of Inbound contacts, 45% correspond to calls (Telephone). The remaining contacts are carried out via IVR (29%), E-mail (15%) and Website (9%). Only 2% correspond to other channels. On average, 1,438,287 contacts were received per day in 2019.

Figure 10

**DISTRIBUTION OF INBOUND CONTACTS (N=668)**

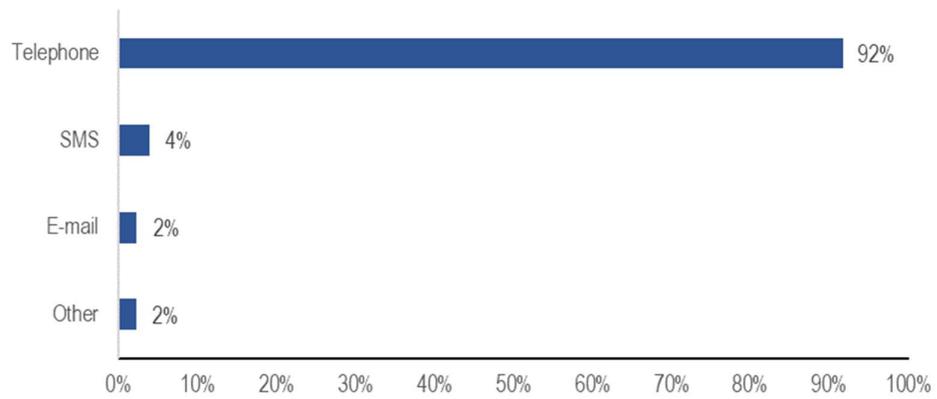


QUESTION: What is the average number of Outbound contacts, per channel, per day?

COMMENT: Regarding the Outbound channels, the Telephone is significantly the most used channel (92%), followed by SMS (4%) and E-mail (2%). On average, 340,235 Outbound contacts were made per day in 2019.

Figure 11

**DISTRIBUTION OF OUTBOUND CONTACTS (N=460)**

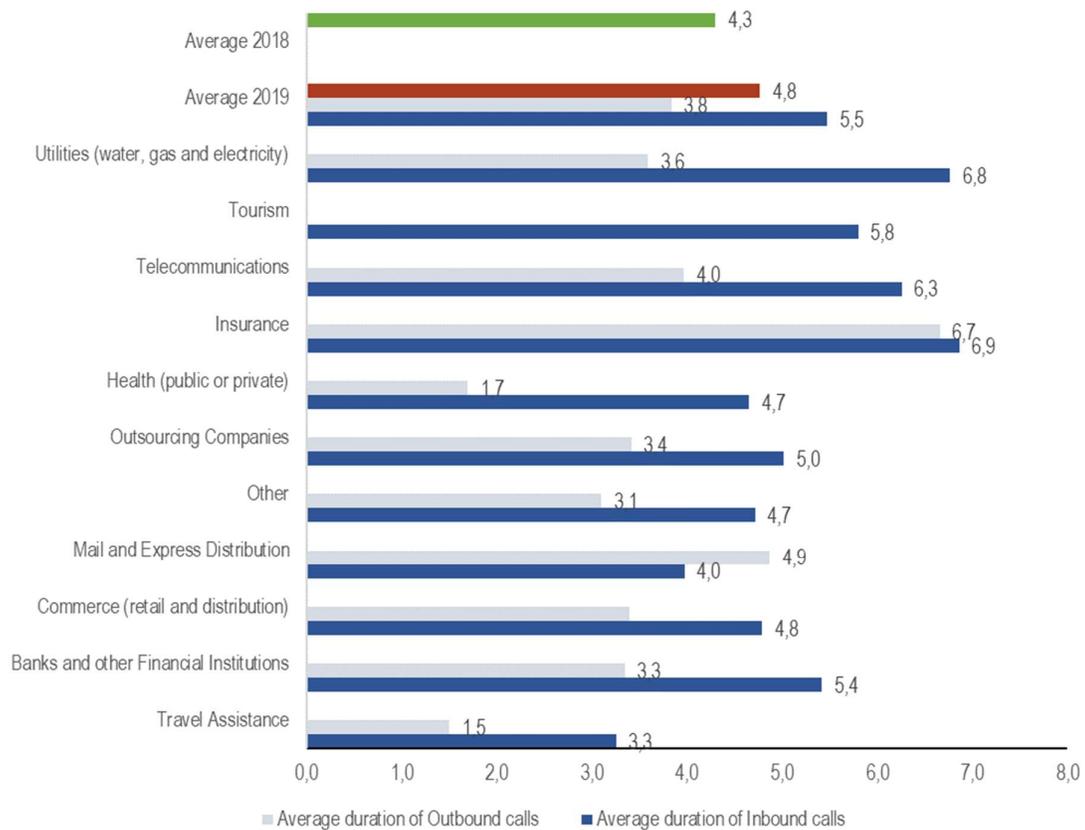


QUESTION: What is the average duration of calls, for Inbound and Outbound?

COMMENT: On average, in 2019, Inbound calls lasted 5.5 minutes while Outbound calls lasted 3.8 minutes. In relation to Inbound, the sectors with the highest average call duration were Utilities (6.8) and Insurance (6.9), while the lowest times were achieved in the Travel Assistance (3.3) and Mail and Express Distribution (4.0). In relation to Outbound, the sectors with the highest call duration were Insurance (6.7) and Mail and Express Distribution (4.9) sectors, with the shortest times being recorded in the Travel Assistance (1.5) and Health (1,7) sectors.

Figure 12

**AVERAGE HANDLING TIME (MINUTES) (N=659)**

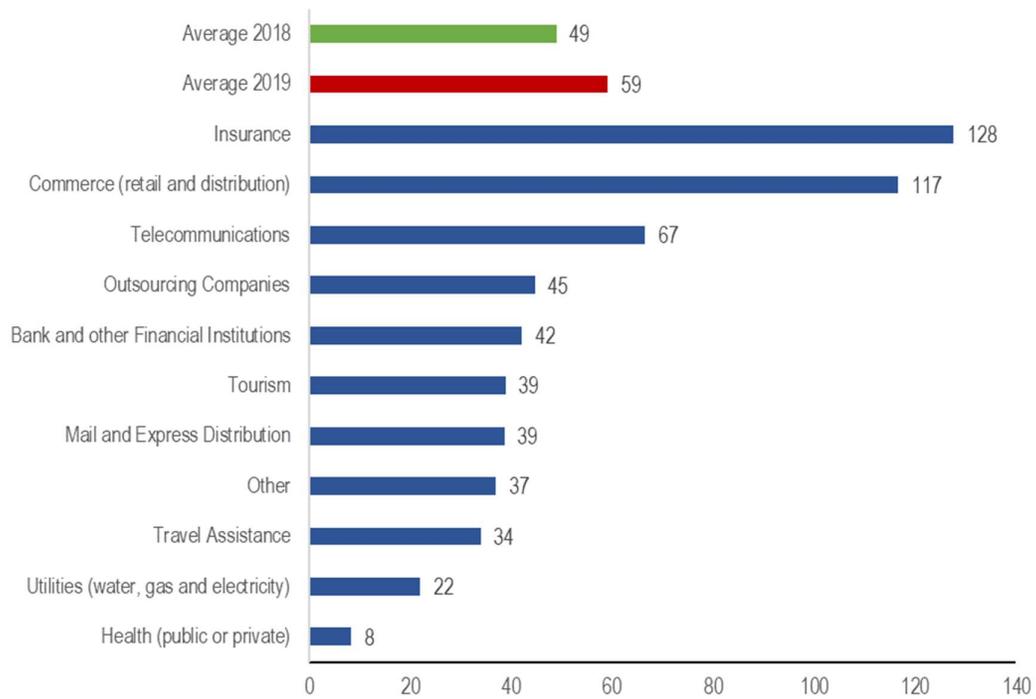


QUESTION: What is the average time on hold?

COMMENT: For the second consecutive year, on hold time recorded a negative evolution, rising this year from 49 seconds to 59 seconds. The sectors that performed less well were Insurance (128 seconds) and Commerce (117 seconds). The Health sector registered a very positive evolution compared to the previous year, registering an average pause time of 8 seconds (99 seconds in 2018).

Figure 13

**AVERAGE TIME "ON HOLD" (SECONDS) (N=402)**

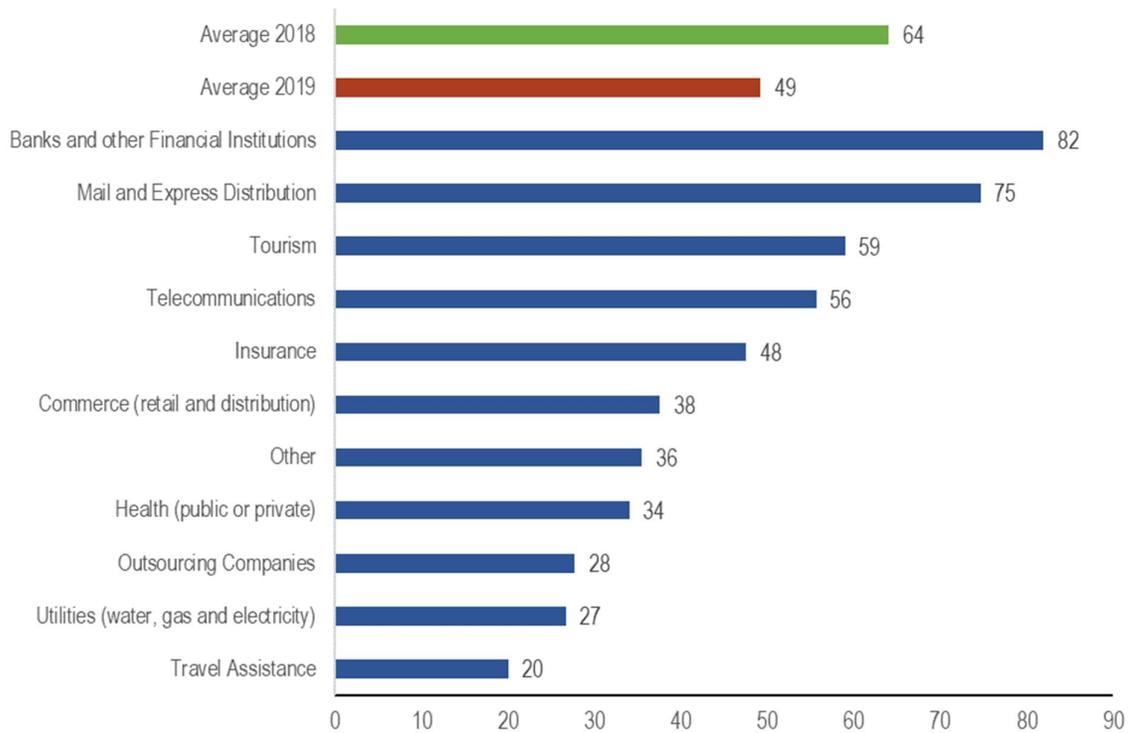


QUESTION: What is the average waiting time to be attended by the Contact Center?

COMMENT: The waiting time to be serviced progressed positively, going against the rise registered from 2017 to 2018, now registering an average of 49 seconds. The sector with the highest waiting time corresponds to Banks and other Financial Institutions (82 seconds), followed by the Mail and Express Distribution (75 seconds). The sectors with the least waiting time were Travel Assistance (20 seconds) and Utilities (27 seconds).

Figure 14

**AVERAGE WAITING TIME TO BE ATTENDED BY THE CONTACT CENTER) (N=592)**

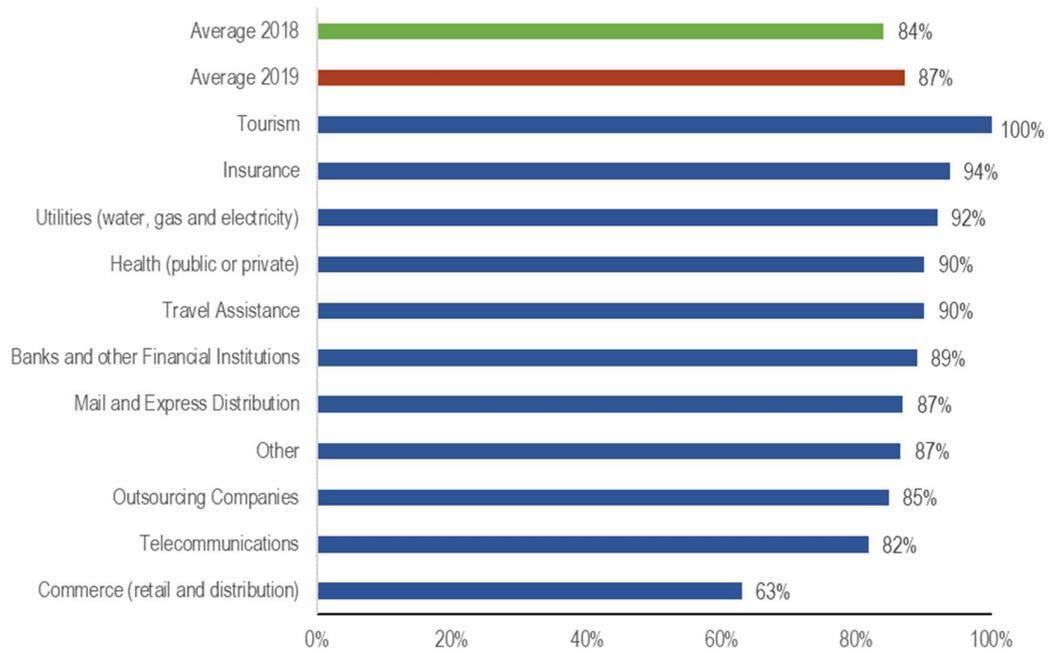


QUESTION: What is the resolution rate at the first contact?

COMMENT: The average resolution rate at the first contact registered a slight increase of 3% in relation to 2018, standing at 87%. As in 2019, the sectors with the best performance were Tourism (100%) and Insurance (94%). The Commerce sector recorded a significant drop in the first contact resolution rate, from 84% to 63% in 2019.

Figure 15

**FIRST CONTACT RESOLUTION RATE (N=527)**

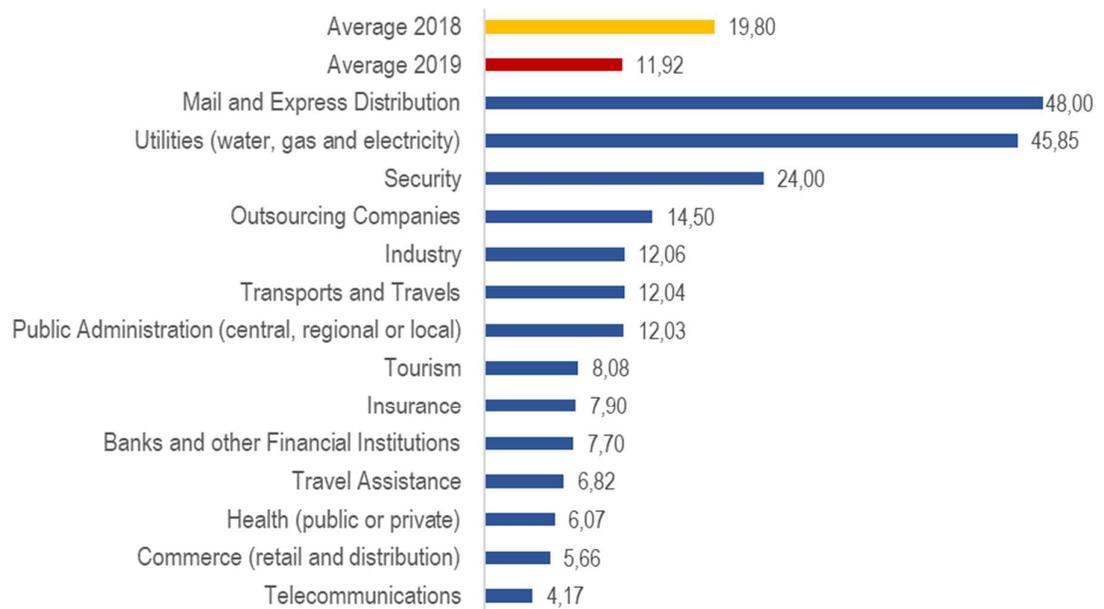


QUESTION: What is the average time to resolve requests, excluding complaints, by sector?

COMMENT: The average request resolution time decreased compared to 2018, from 19.8 hours to 11.92 hours. The sectors with the shortest time to resolve requests were Telecommunications (4.17 hours), Commerce (5.66 hours) and Health (6.07 hours). On the other hand, the sectors that recorded the worst performance in this metric were Utilities (45.85 hours) and Mail and Express Distribution (48 hours).

Figure 16

**AVERAGE REQUEST RESOLUTION TIME (HOURS), EXCLUDING COMPLAINTS (N=344)**

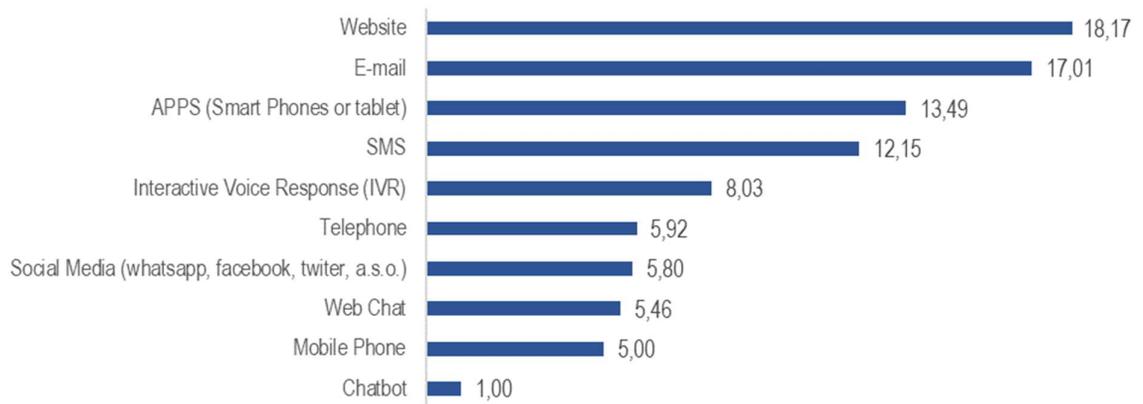


QUESTION: What is the average request resolution time, excluding complaints, per channel?

COMMENT: The Website (18.17 hours), E-mail (17.01 hours) and APPS (13.49 hours) channels continue to be the channels with the highest average resolution time. The channel with the lowest average resolution time in 2019 was Web Chat (resulting from a single response, this result should be interpreted in a relative way).

Figure 17

**AVERAGE REQUEST RESOLUTION TIME, PER CHANNEL (HOURS) EXCLUDING COMPLAINTS**  
(N=501)



QUESTION: What is the average time to resolve complaints, per channel?

COMMENT: Compared to last year, this indicator had a negative evolution, with the average time to resolve complaints increased from 1.4 to about 3 days. The Telecommunications sector had a significant increase, having increased from 1.5 to 4.09 days compared to 2018. The sectors with the best performance were Travel Assistance (0.04 days) and Tourism (0.16 days). The channels with the highest average resolution time for complaints were Social Media (5.22 days) and E-mail (4.03 days), with the best performance being the Telephone (1.96 days).

Figure 18

**AVERAGE COMPLAINT RESOLUTION TIME (DAYS) (N=130)**

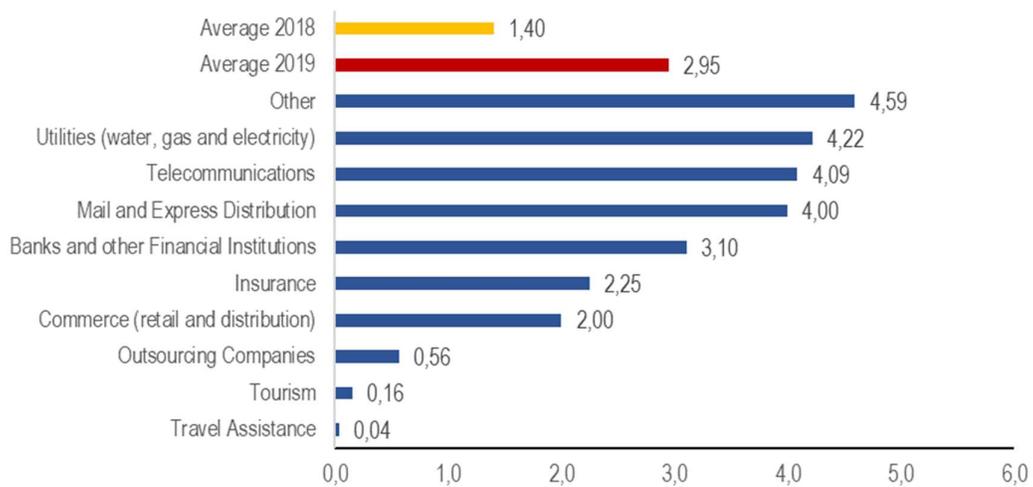
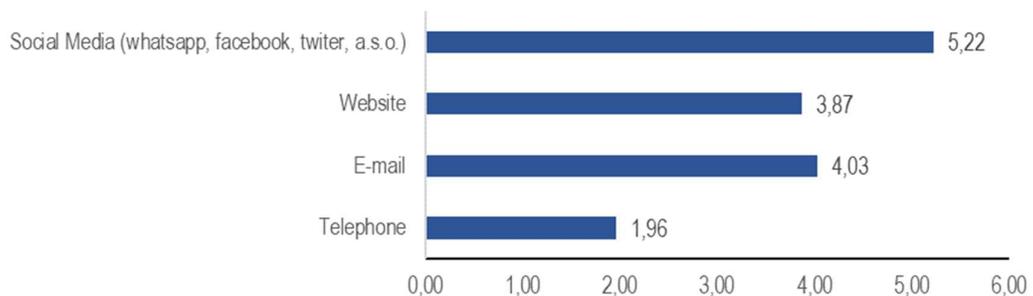


Figure 19

**AVERAGE COMPLAINT RESOLUTION TIME, PER CHANNEL (DAYS) (N=130)**

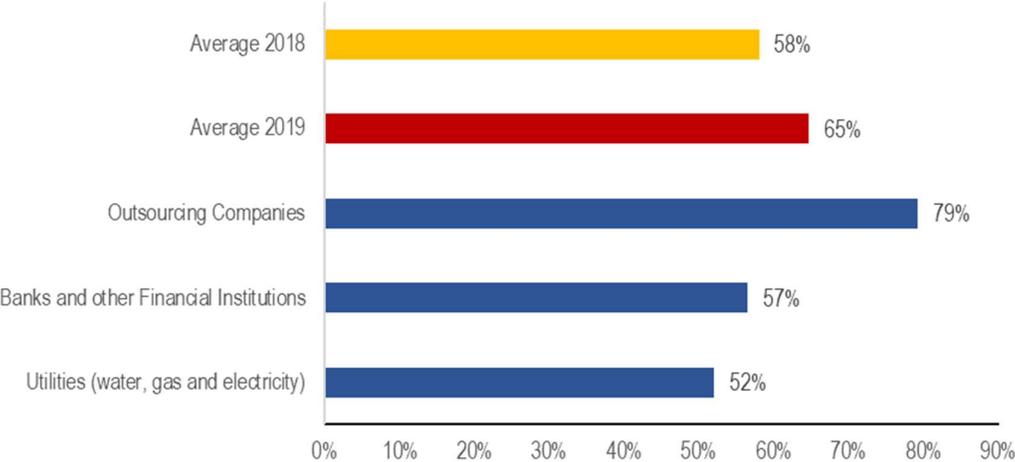


QUESTION: What is the success rate for Inbound retention calls?

COMMENT: The success of Inbound retention calls registered an interesting increase compared to the previous year, developing from 58% to 65% in 2019. The best performance occurred among Outsourcing Companies (79%) and the lowest value in Utilities (52%).

Figure 20

**SUCCESS RATE OF INBOUND RETENTION CALLS (N=144)**

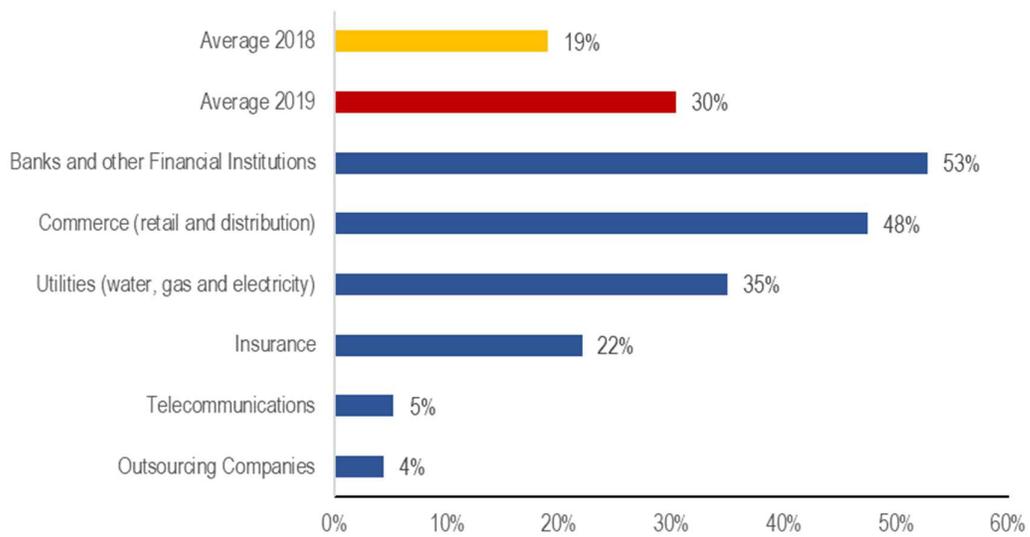


QUESTION: What is the percentage of successful "sales" in Outbound calls?

COMMENT: After growing from 7% to 19% in 2018, the percentage of successful "sales" in Outbound calls registered a positive evolution, from 19% to 30% in 2019. The sector in which the performance was most relevant was Banks and other Financial Institutions (53%). The sector with the lowest success rates was Outsourcing Companies (4%).

Figure 21

**SUCCESS PERCENTAGEN OF SALES ON OUTBOUND CALLS (N=152)**

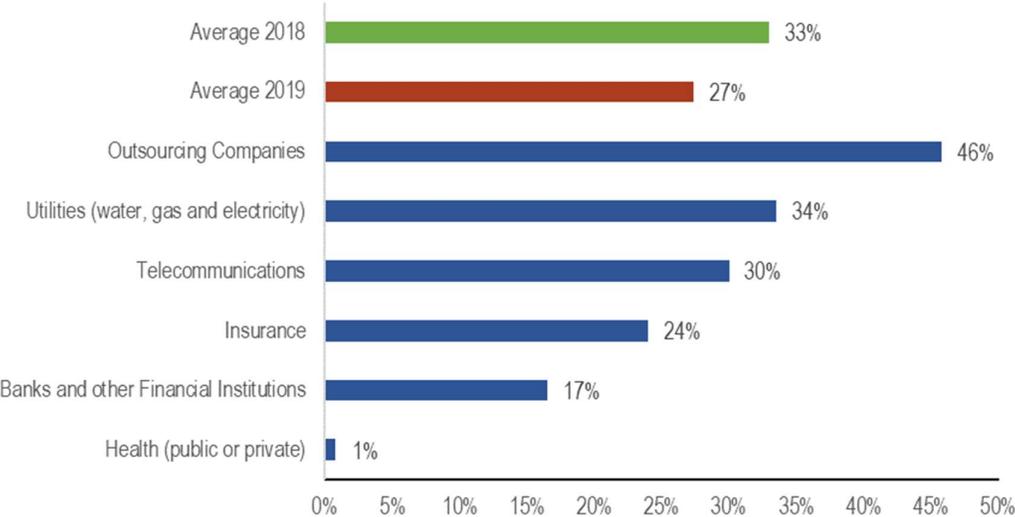


QUESTION: What is the success rate for Outbound retention calls?

COMMENT: Contrary to the very positive evolution observed in the previous study, the percentage of success in Outbound retention calls fell by 6 % in 2019 (33% to 27%). The sector with the best performance was Outsourcing Companies (46%) and the sector with the lowest performance was Health (1%).

Figure 22

**SUCCESS RATE OF OUTBOUND RETENTION CALLS (N=192)**

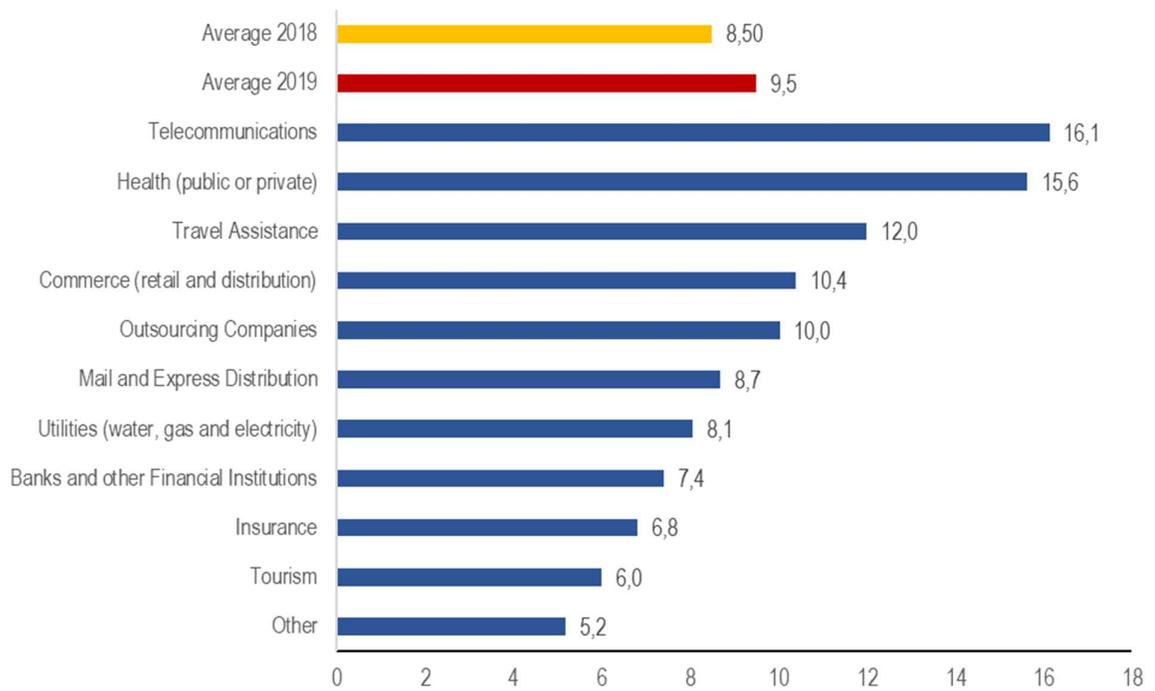


QUESTION: What is the average number of calls attended by Operator, per hour?

COMMENT: The average number of calls answered per Operator per hour increased from 8.5 to 9.5 calls compared to 2018. The sectors with the highest average number of calls answered per Operator per hour were Telecommunications (16.1) and Health (15.6), while the Tourism (6.0) and Others (5.2) were the sectors that registered, on average, a lower number of calls answered per hour, by Operator.

Figure 23

**AVERAGE NUMBER OF CALLS ATTENDED PER OPERATOR PER HOUR AND SECTOR OF ACTIVITY (N=655)**

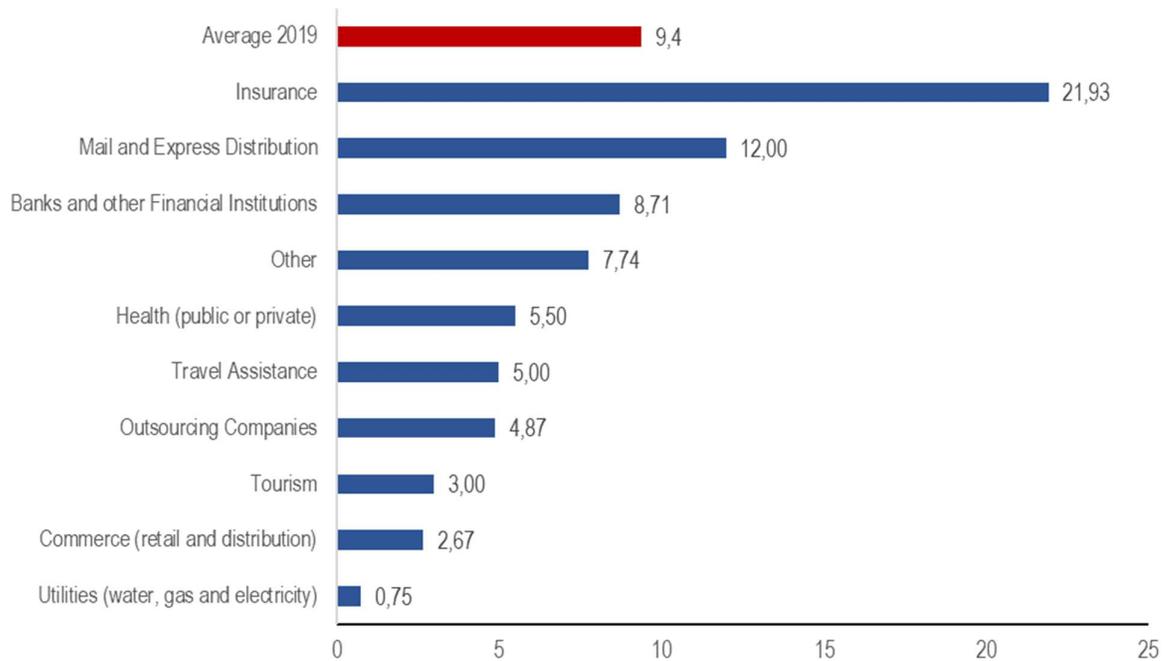


QUESTION: What is the average number of written requests answered by Operator, per hour?

COMMENT: On average, each Operator responds to 9.4 written requests per hour. The Insurance sector stands out from the rest, registering an average number of responded written requests of 21.93 per Operator per hour.

Figure 24

**AVERAGE NUMBER OF WRITTEN REQUESTS ANSWERED PER OPERATOR PER HOUR AND SECTOR OF ACTIVITY (N=328)**



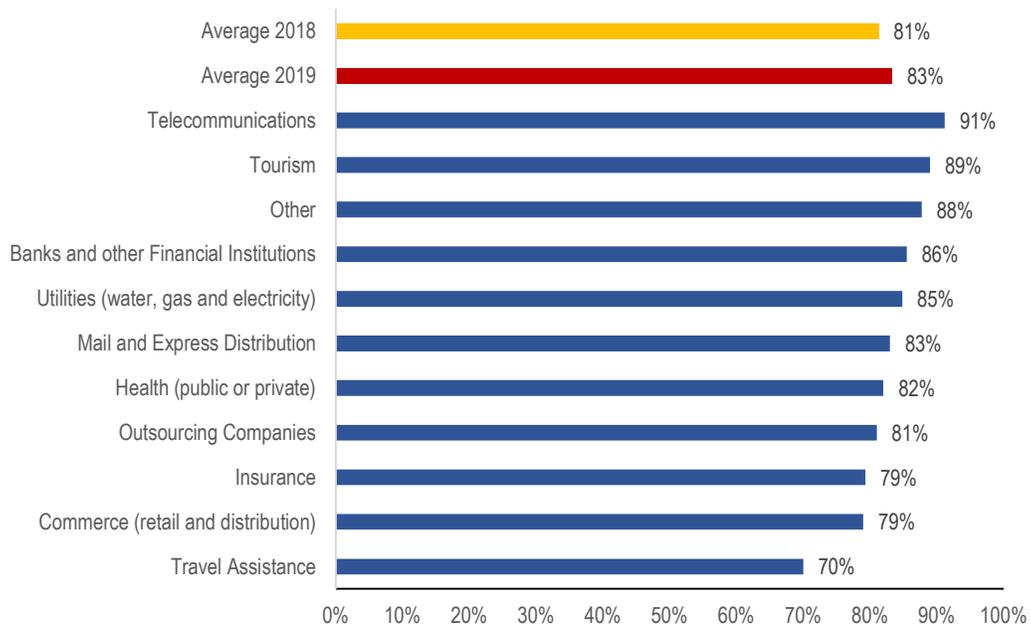
### 3 Human Resources

QUESTION: What is the average resource occupancy rate in 2019?

COMMENT: The average resource occupancy rate rose from 81% to 83% in 2019. The sectors that registered higher occupancy rates were Telecommunications (91%) and Tourism (89%). The Travel Assistance sector (70%) had the lowest occupancy rate.

Figure 25

**AVERAGE RESOURCES OCCUPANCY RATE (N= 662)**

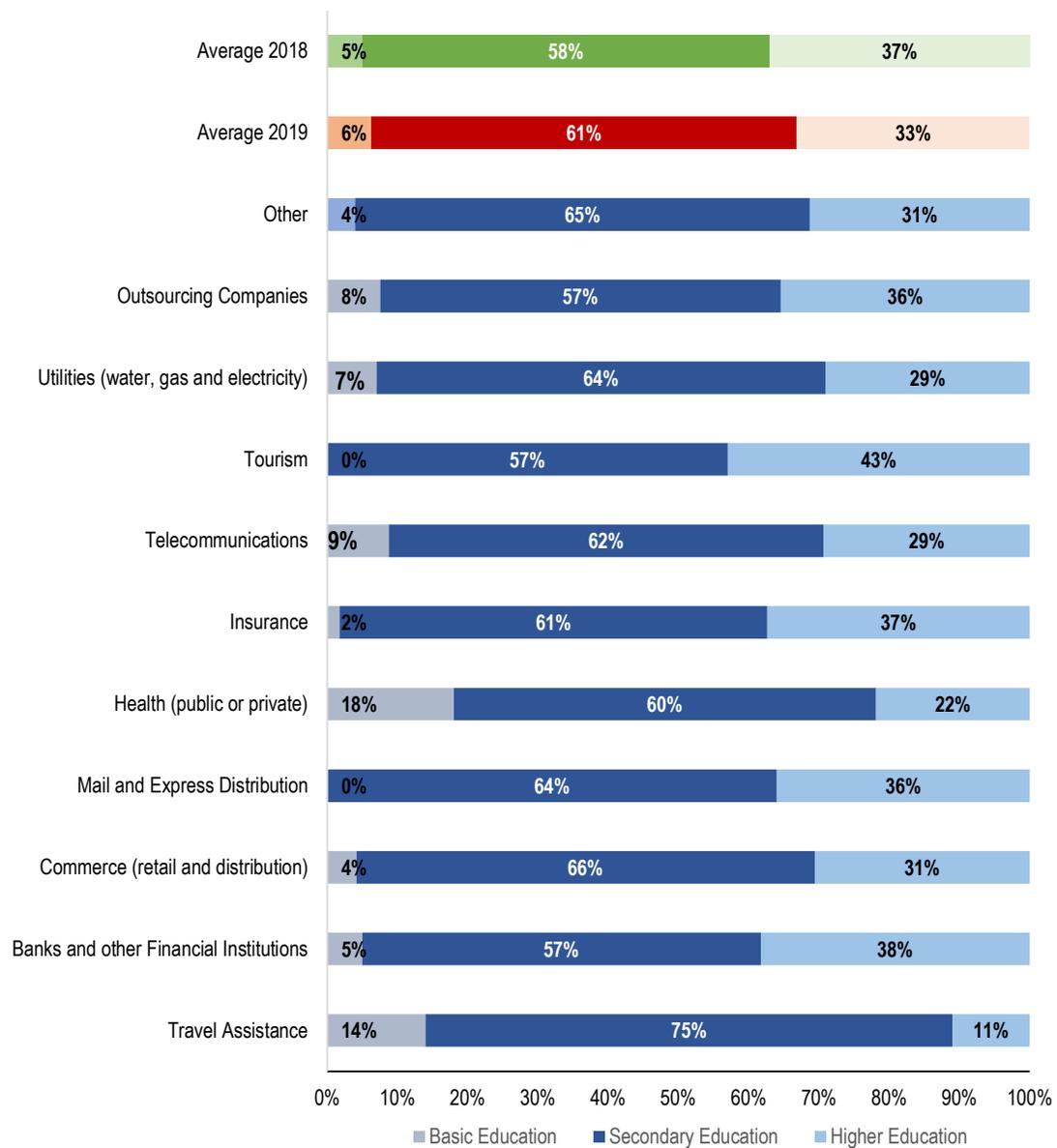


QUESTION: What is the distribution of employees by educational level?

COMMENT: In relation to 2018, with slight changes, the distribution values of employees by educational level are maintained, university degree with 33% (slightly below the 37% observed in 2018), 61% with secondary level and only 6 % with basic level. The sectors with the highest percentage of employees with higher education are Tourism (43%), Banks and other Financial Institutions (38%) and Insurance (37%). With regard to basic education, the Health (18%) and Travel Assistance (14%) are the sectors with the greatest representation in the distribution by this level.

Figure 26

**DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY LEVEL OF EDUCATION (N=717)**



QUESTION: Are employee satisfaction surveys conducted? What is the frequency of employee satisfaction surveys? What rating was obtained, on a scale of 0% to 100%, in the last year?

COMMENT: 85% of respondents indicate that they carry out satisfaction surveys on their employees mostly on an annual basis (67%). Regarding the average rating obtained, there is a slight increase compared to 2018 (76% instead of 74%). The sectors that registered the most positive evaluations were Tourism (80%), Mail and Express Distribution (80%) and Banks and other Financial Institutions (80%). Of the sectors with less positive evaluations, the Health sector stands out (65%).

Figure 27

**Are employee satisfaction surveys conducted? (N=722)**

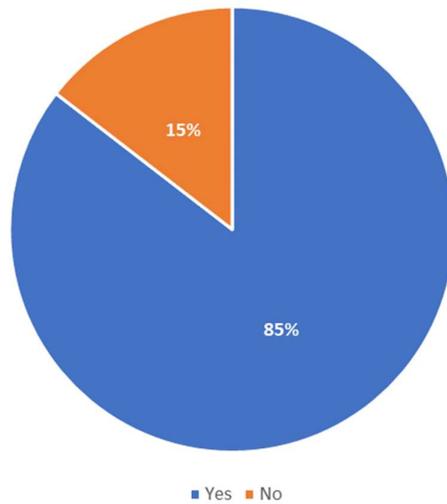


Figure 28

**What is the frequency of employee satisfaction surveys? (N=722)**

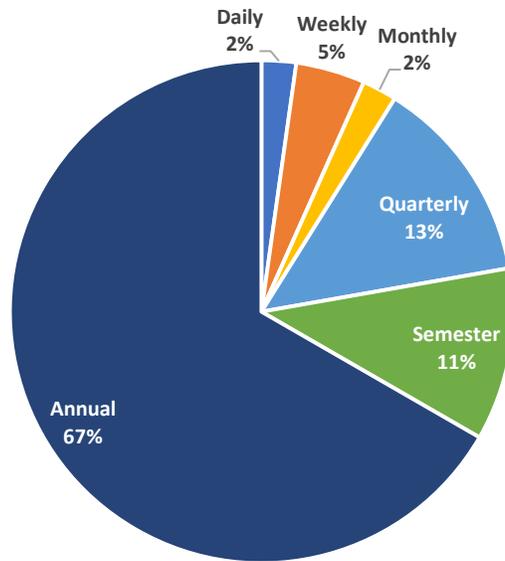
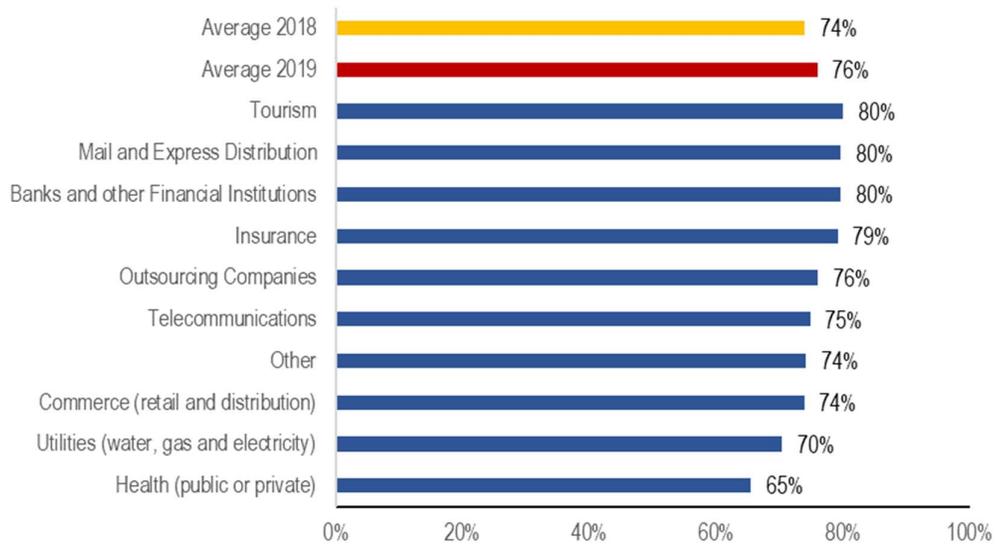


Figure 29

**RATING ACHIEVED ON EMPLOYEES SATISFACTION SURVEYS (N=254)**

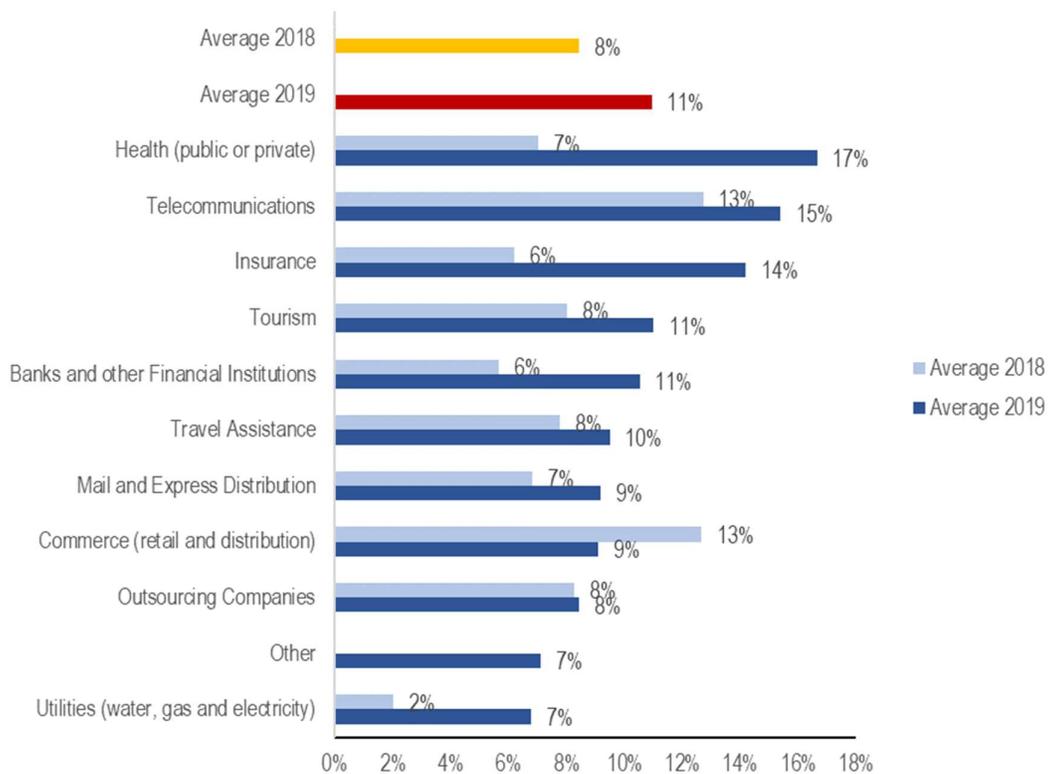


QUESTION: What is the average absenteeism rate for Operators in 2019?

COMMENT: Compared to the previous study, the absenteeism rate increased by 3 percentage points, with an average of 11% in 2019. The sector of activity with the highest absenteeism rate is Health (17%), being Utilities the lowest (7%). In general, the absenteeism rate increased in all sectors except in Commerce (13% to 9%).

Figure 30

**OPERATORS AVERAGE ABSENTEEISM RATE (N=677)**

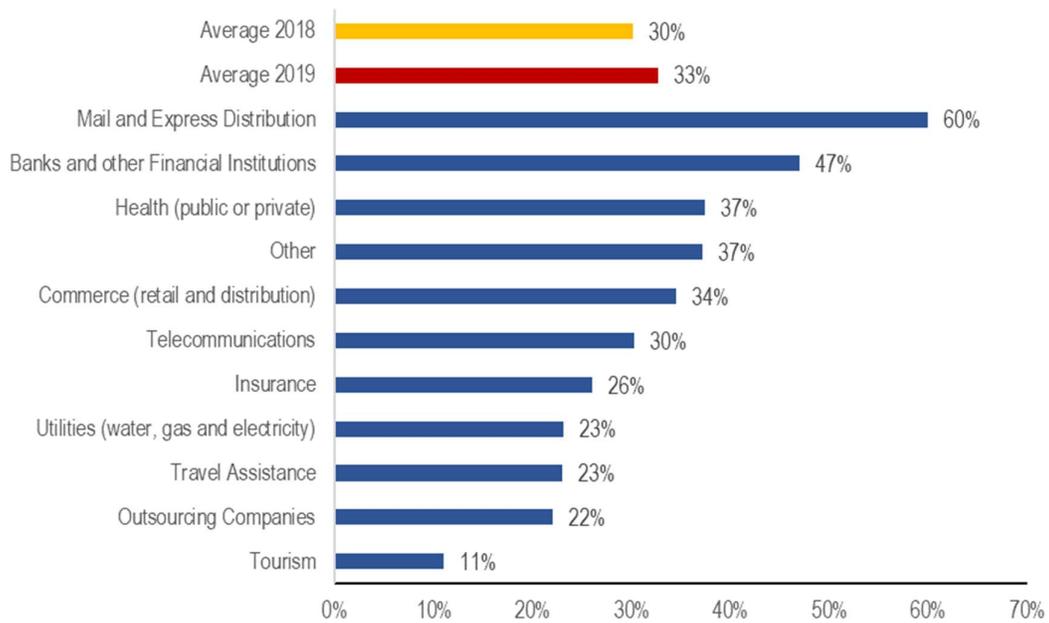


QUESTION: What is the rotation rate for Operators in 2019?

COMMENT: Operators' rotation rate increased from 30% to 33% in 2019, following the trend of recent years. Mail and Express Distribution (60%) and Banks and other Financial Institutions (47%) were the sectors that registered the highest rotation figures. The Tourism sector stands out compared to the sample with a rotation rate of 11%.

Figure 31

**OPERATORS ROTATION RATE (N=722)**

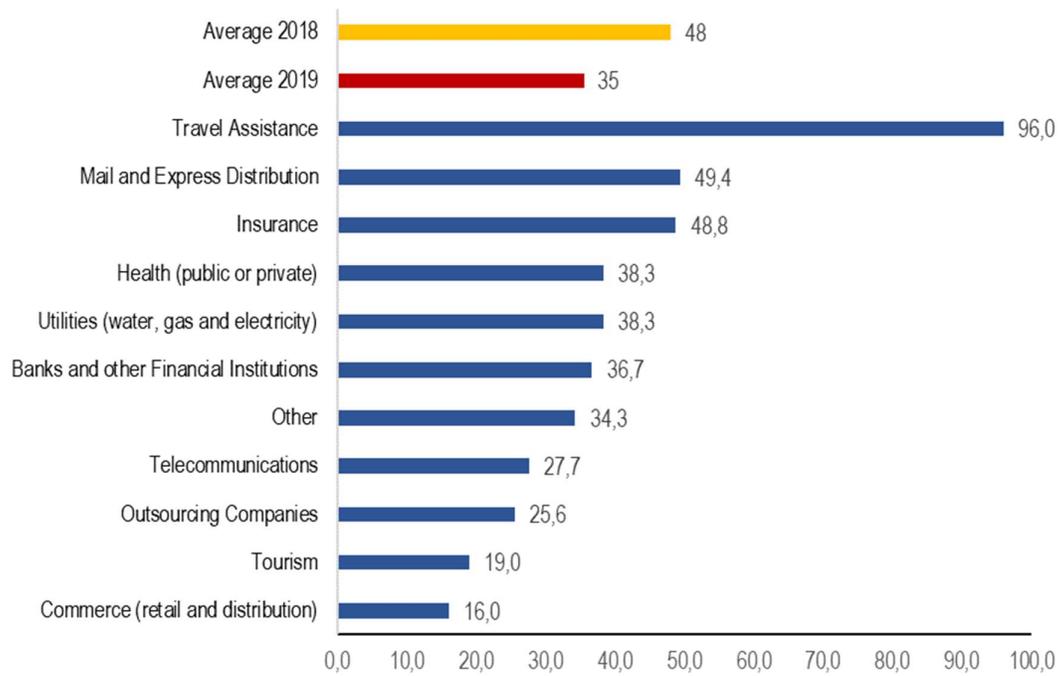


QUESTION: What is the average seniority of the Operators?

COMMENT: Operators' average seniority decreased from 48 to 35 months compared to 2018, which was expected given the increase in the rotation rate. The Travel Assistance sector recorded the highest seniority value (96 months), while the Commerce sector registered the lowest (16 months).

Figure 32

**OPERATORS AVERAGE SENIORITY (months) (N=596)**

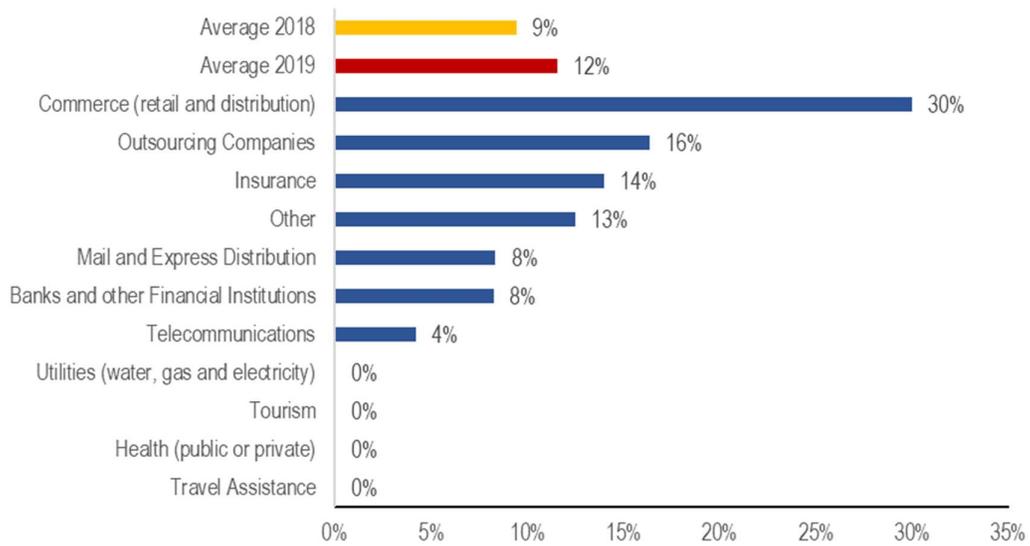


QUESTION: What is the rotation rate of Supervisors in 2019?

COMMENT: As observed in the Operators, the rotation rate of Supervisors also increased compared to 2018 (12% instead of 9%), also following the trend of recent years. The Commerce sector stands out from the rest with a rotation rate of 30%.

Figure 33

**SUPERVISORS ROTATION RATE (N=718)**

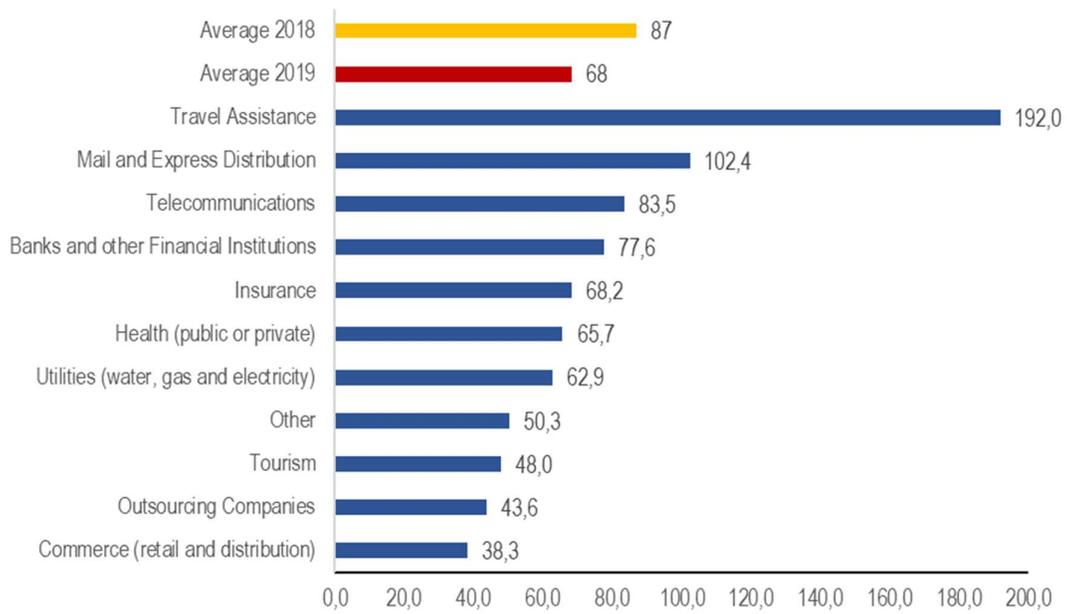


QUESTION: What is the average seniority of the Supervisors?

COMMENT: Following the evolution of the rotation rate, the average seniority of Supervisors decreased in relation to 2018 (68 months instead of 87), with the Outsourcing Companies (43.6 months) and Commerce (38.3 months) sectors being those that have a lower average seniority. On the other hand, the Travel Assistance sector (192 months) has a significantly higher value.

Figure 34

**SUPERVISORS AVERAGE SENIORITY (months) (N=584)**

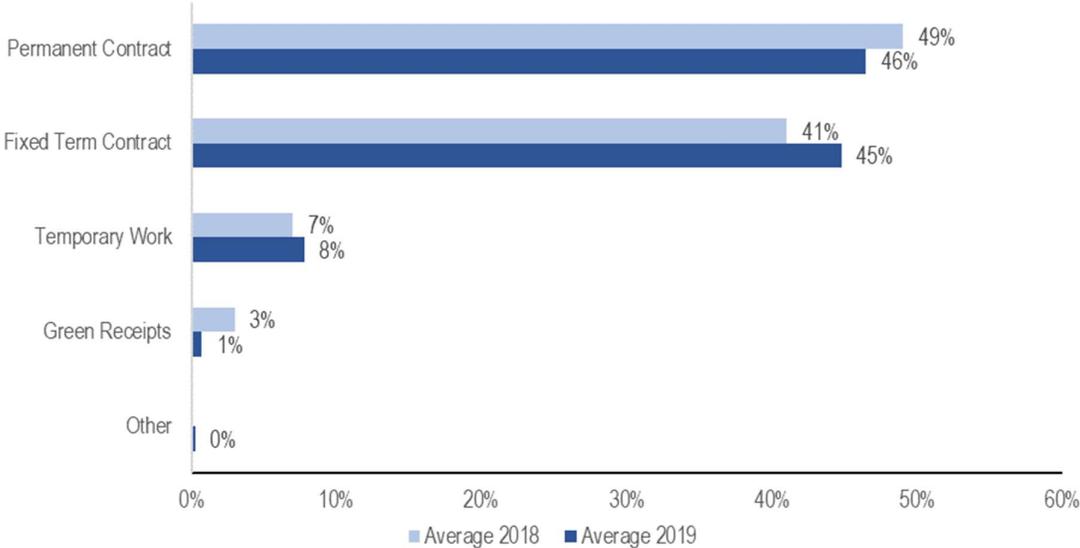


QUESTION: What is the distribution of employees by contractual bond?

COMMENT: This year's results show an approximation between the percentage of employees with an effective link (46%) and with term contracts (45%). It is also important to note the decrease in the percentage of employees hired on Green Receipts (1% instead of 3%).

Figure 35

**DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY CONTRACTUAL BOND (N=697)**

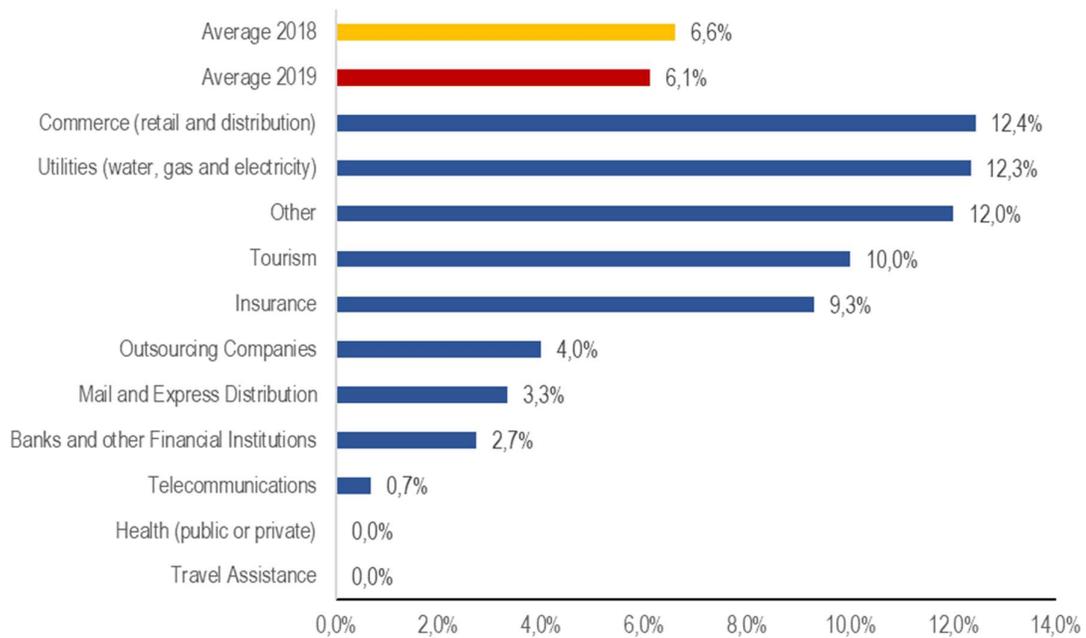


QUESTION: What percentage of Contact Center employees are relocated to other functions within the Organization?

COMMENT: This indicator registered a slight decrease in relation to 2018 (6.6% to 6.1%). The sector in which the relocation was most frequent was Commerce (12.4%), with no reallocations in the Health and Travel Assistance sectors.

Figure 36

**PERCENTAGE OF CONTACT CENTER EMPLOYEES ACCESSING OTHER FUNCTIONS WITHIN THE ORGANIZATION (N=637)**

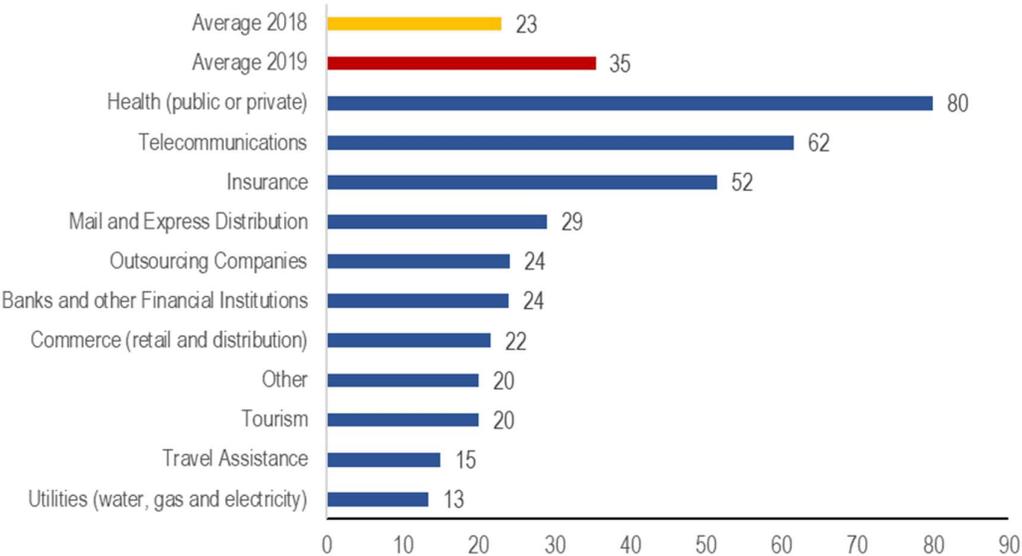


QUESTION: What is the average time needed to train an employee who has just entered the Contact Center?

COMMENT: The average time of initial training increased considerably in 2019 (35 days instead of 23). The sector with the longest reported time was the Health sector (80 days), with the Utilities sector being the sector with the least reported time (13 days).

Figure 37

**AVERAGE TIME REQUIRED TO TRAIN AN EMPLOYEE WHO HAS JUST ENTERED THE CONTACT CENTER (days) (N=720)**

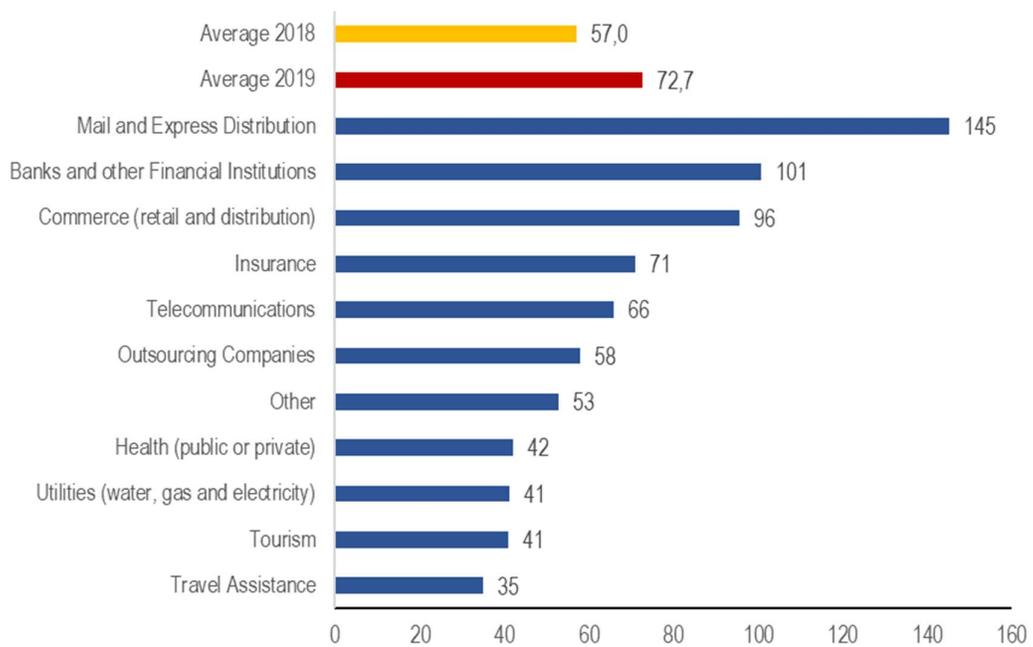


QUESTION: What is the number of annual training hours, including recycling, per Operator?

COMMENT: The number of annual training hours per Operator increased compared to 2018 (72.7 hours instead of 57 hours). The sector with the most annual training hours was the Mail and Express Distribution sector (145 hours), while the one with the lowest number was the Travel Assistance sector (35 hours).

Figure 38

**HOURS OF ANNUAL TRAINING (PER OPERATOR) (N=719)**

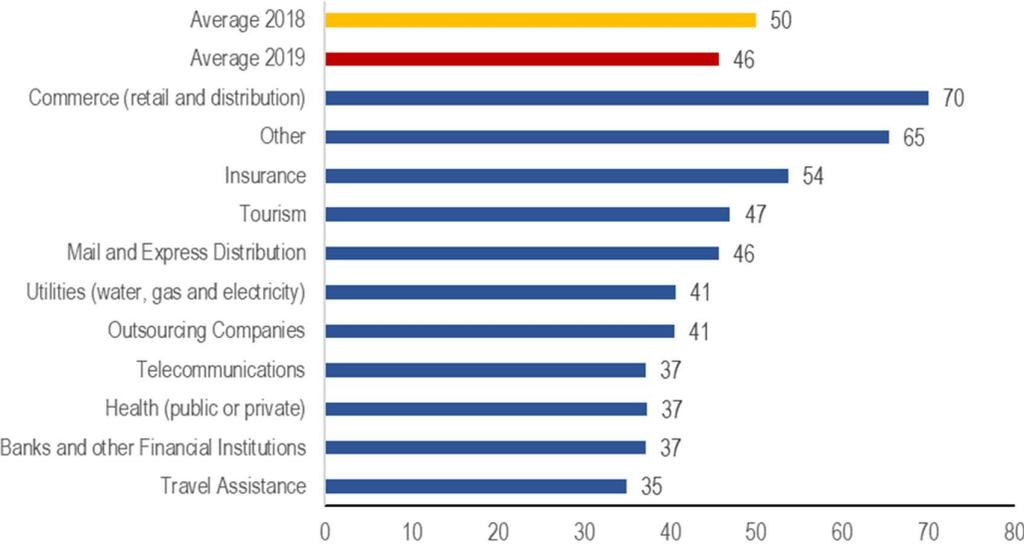


QUESTION: What is the number of annual training hours, including recycling, per Supervisor?

COMMENT: Unlike what happened with Operators, the number of training hours for Supervisors decreased compared to 2018 (46 instead of 50). The sector with the most annual training hours was Commerce (70), while, as in Operators, the Travel Assistance sector registered the lowest value (35).

Figure 39

**HOURS OF ANNUAL TRAINING (PER SUPERVISOR) (N=719)**



QUESTION: Is there a specific training / accreditation plan / program for Supervisors / Trainers / Quality Experts?

COMMENT: Compared to 2018, there was a reduction in the percentage of respondents who claim to have specific training / accreditation plans / programs for Supervisors (81% in 2018 to 69% in 2019). With regard to the existence of specific training / accreditation plans / programs for Trainers, there was a reduction in the reported percentage, rising from 76% in 2018 to 71% in 2019. About 55% of respondents claim to have plans / programs of specific training / accreditation for Quality Experts, constituting a reduction compared to the value observed in 2018 (68%)

Figure 40.A

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR SUPERVISORS (2018)? (N=120)**

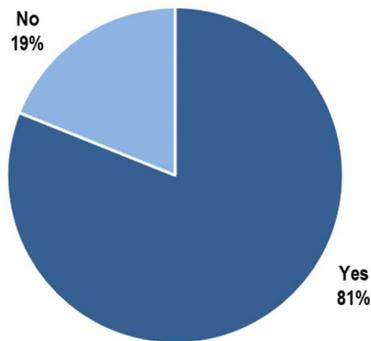


Figure 40.B

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR SUPERVISORS (2019)? (N=722)**

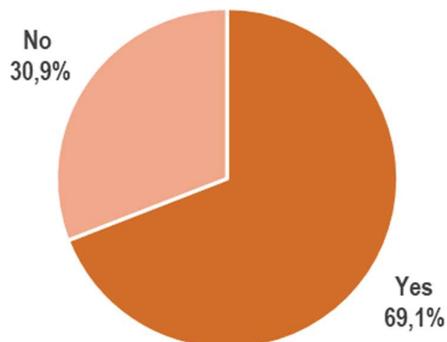


Figure 41.A

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR TRAINERS (2018)? (N=120)**

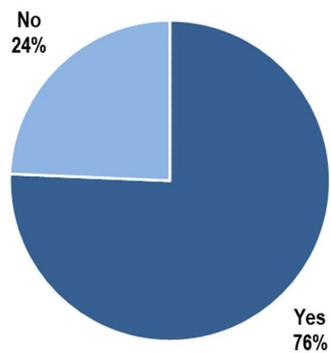


Figure 41.B

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR TRAINERS (2019)? (N=722)**

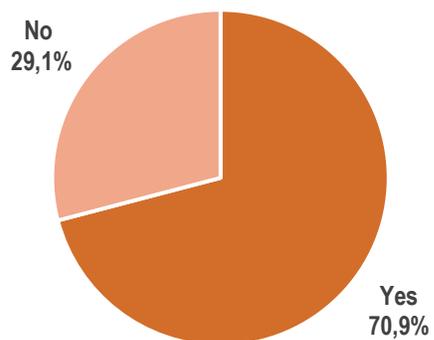


Figure 42.A

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (2018)?  
(N=120)**

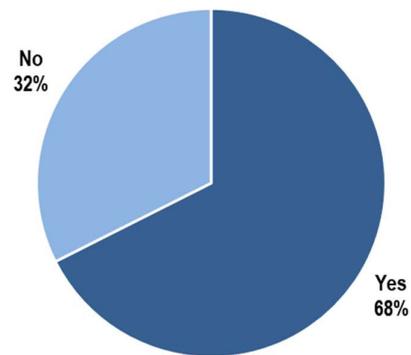
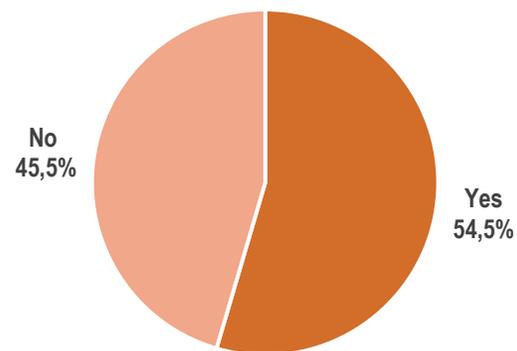


Figure 42.B

**PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (2019)?  
(N=722)**



QUESTION: What is the gender distribution of operators?

COMMENT: The female gender remains the predominant gender of Contact Center employees. Compared to the previous year, there was an increase of 5% of female Operators, now representing. In relation to Supervisors, the proportion remained unchanged compared to the previous year, with the percentage of female Supervisors being 60%.

Figure 43.A

**OPERATOR DISTRIBUTION BY GENDER (N = 143)**

**2018**

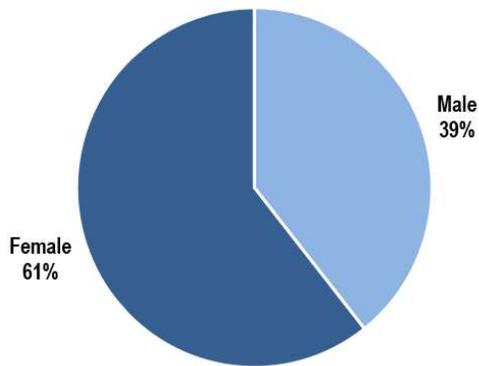


Figure 43.B

**OPERATOR DISTRIBUTION BY GENDER (N=722)**

**2019**

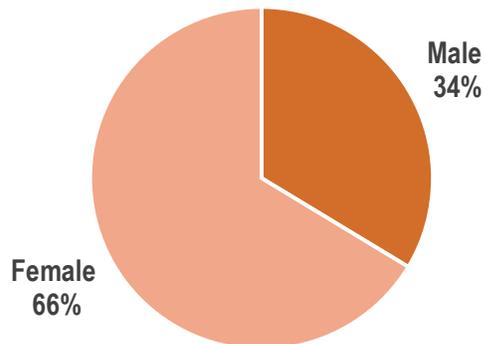


Figure 44.A

SUPERVISORS DISTRIBUTION BY GENDER (N = 143)

2018

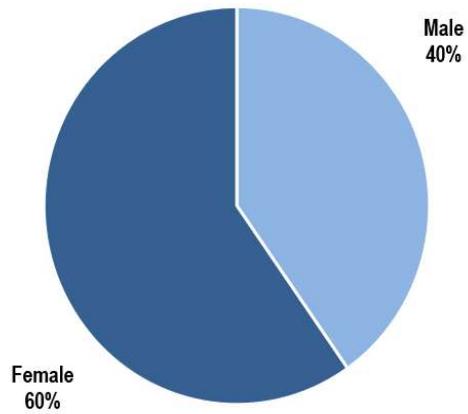
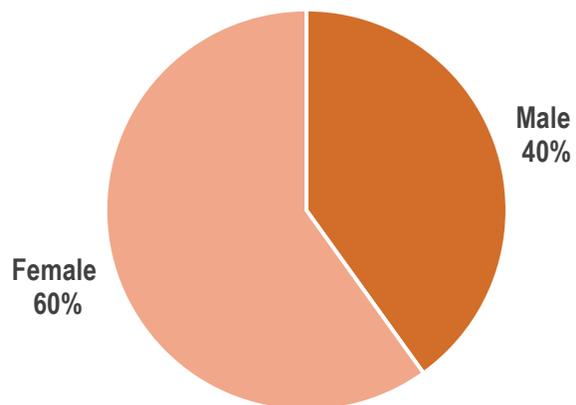


Figure 44.B

SUPERVISORS DISTRIBUTION BY GENDER (N=722)

2019



QUESTION: What is the average age of Operators / Supervisors?

COMMENT: The interval between 25 and 40 years old corresponds to the predominant age group of Operators and Contact Center Supervisors. About 95% of the Operators are in the age group from 25 to 40 years old, and only about 5% are over 40 years old. With regard to Supervisors, it is observed that around 89% of Supervisors are between 25 and 40 years old, with around 11% over 40 years old.

Figure 45

**OPERATORS AVERAGE AGE (2019) (N=722)**

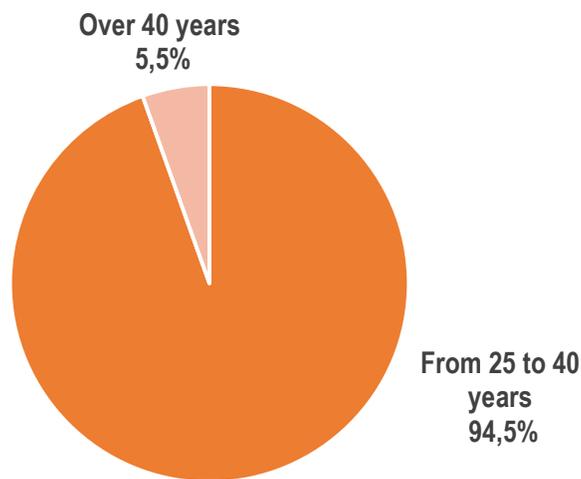
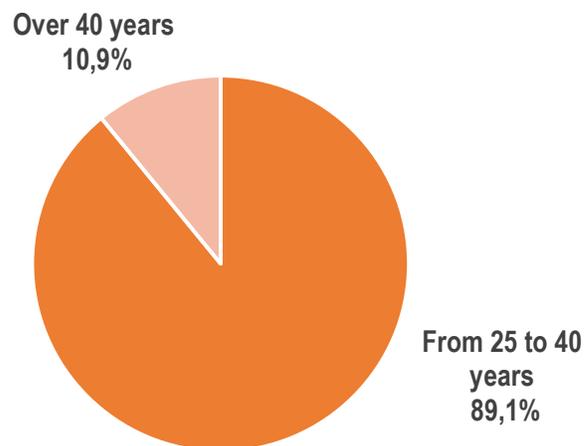


Figure 46

**SUPERVISORS AVERAGE AGE (2019) (N=722)**



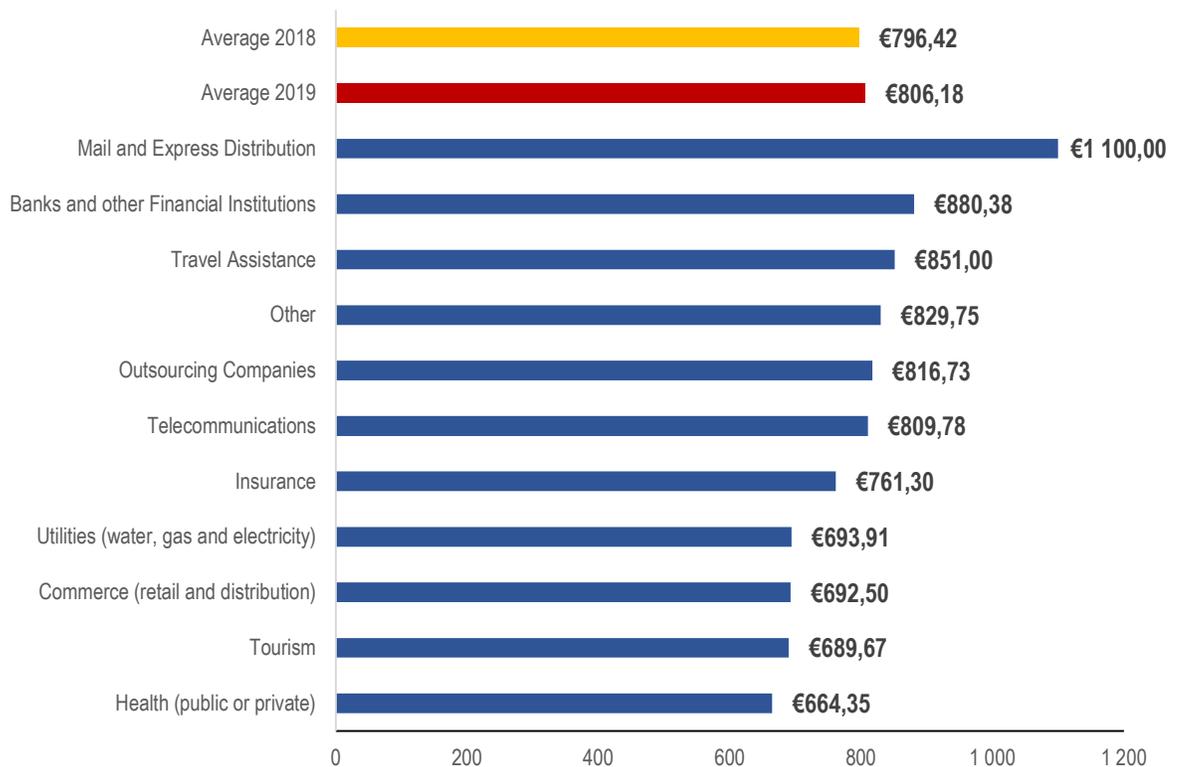
## 4 Policies and Benefits

QUESTION: What is the Operators average monthly gross salary?

COMMENT: In 2019, the Operators average monthly gross salary increased by approximately 10€, now standing at 806.18€. The sector with the higher remunerations was Mail and Express Distribution (1,100€), the lowest values were found in the Health (664.35€), Tourism (689.67€) and Commerce (692.5€).

Figure 47

### OPERATORS AVERAGE MONTHLY GROSS SALARY (Euros) (N=702)

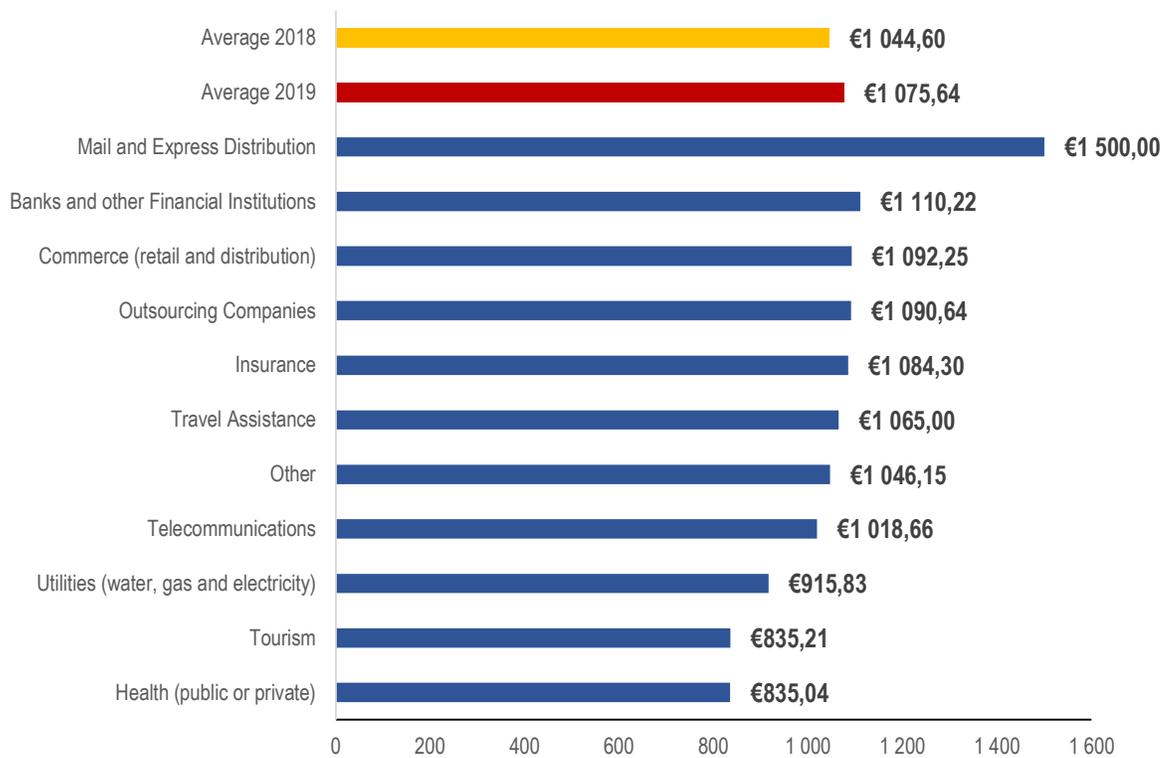


QUESTION: What is the Supervisors average gross monthly salary?

COMMENT: As in the case of Operators' remuneration, the Supervisors average salary also increased to 1,075.64€ instead of 1,044.60€. The sector with the highest average was Mail and Express Distribution (1,500€). The lowest amounts were in the Health (835€) and Tourism (835€).

Figure 48

**SUPERVISORS AVERAGE MONTHLY GROSS SALARY (Euros) (N=702)**

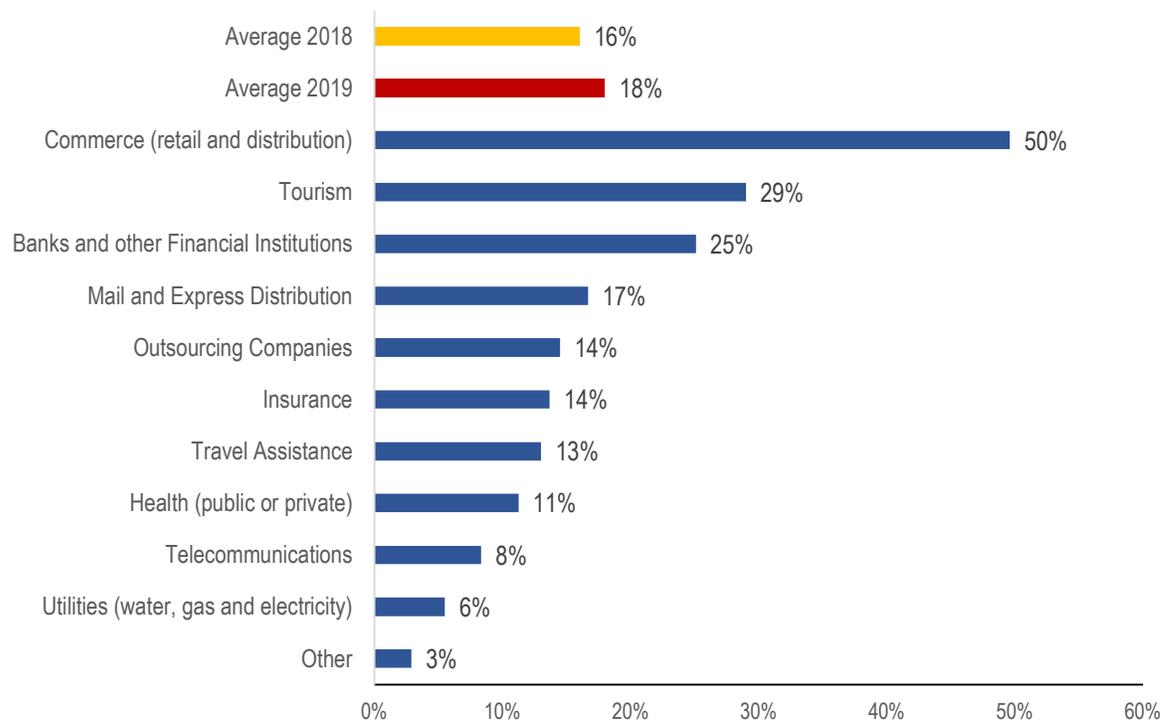


QUESTION: What is the ratio between other remunerations compared to the monthly gross salary per Operator?

COMMENT: The ratio of other remunerations to the average monthly gross salary was 18% in 2019, against 16% in 2018. The sectors with the highest ratios were Commerce (50%) and Tourism (29%) It is interesting to note that these were among the sectors with the lowest gross salary. The Utilities sector (6%) and Others (3%) registered the lowest values.

Figure 49

**RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF OPERATORS (N=709)**

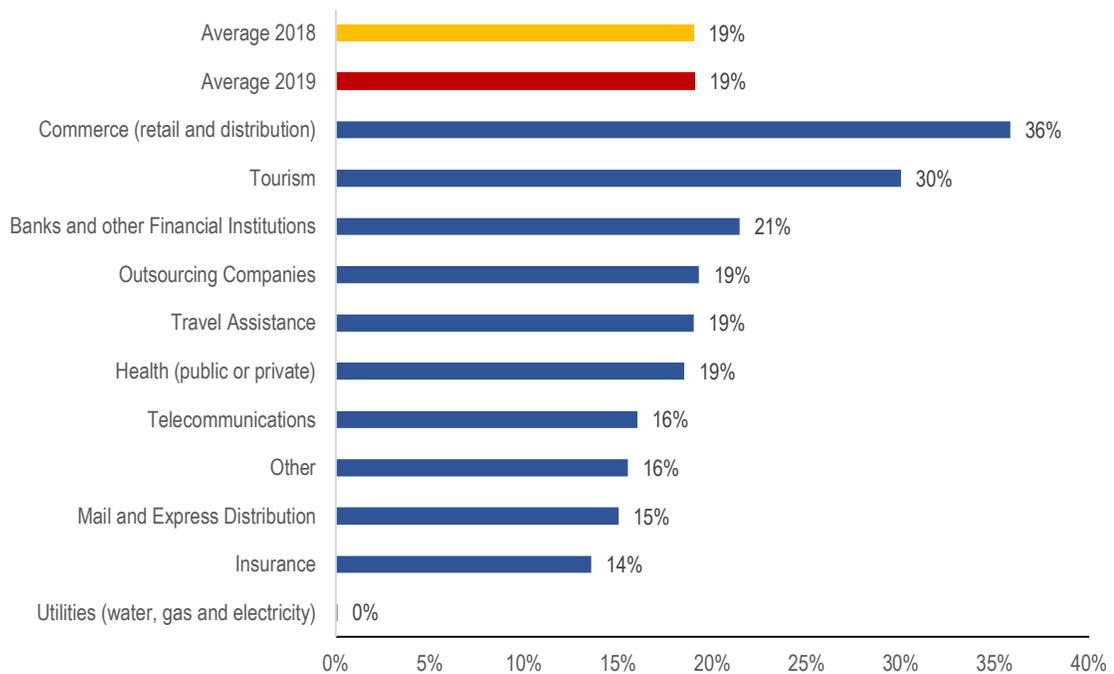


QUESTION: What is the ratio between other remunerations compared to the monthly gross salary of Supervisors?

COMMENT: The ratio among other remunerations compared to the average monthly gross salary of Supervisors is only 1% higher than that of the Operators (19%), with no change compared to the previous year. Commerce (36%) and Tourism (30%), similar to Operators, are the sectors with the highest values, while Utilities has a ratio of 0.

Figure 50

**RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF SUPERVISORS (N=709)**



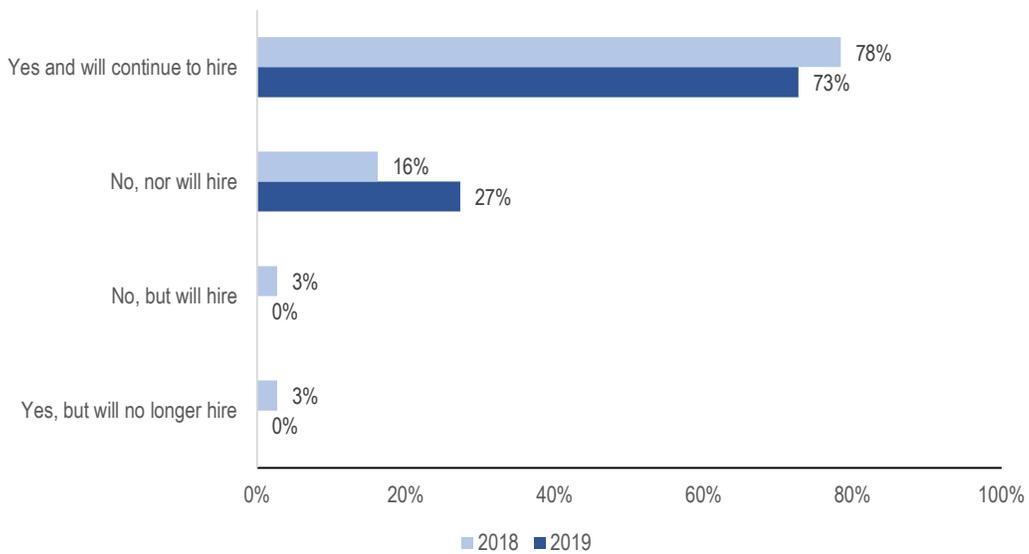
## 5 Resort to Outsourcing

QUESTION: Does the company hire Outsourcing Services for Contact Center functions?

COMMENT: Compared to the previous year, there is less intention to hire Outsourcing Services (from 78% to 73% in 2019). Additionally, there was an increase in the percentage of companies that do not plan to hire these services in the future (from 16% to 27% in 2019).

Figure 51

### OUTSOURCING SERVICES HIRING (N=722)

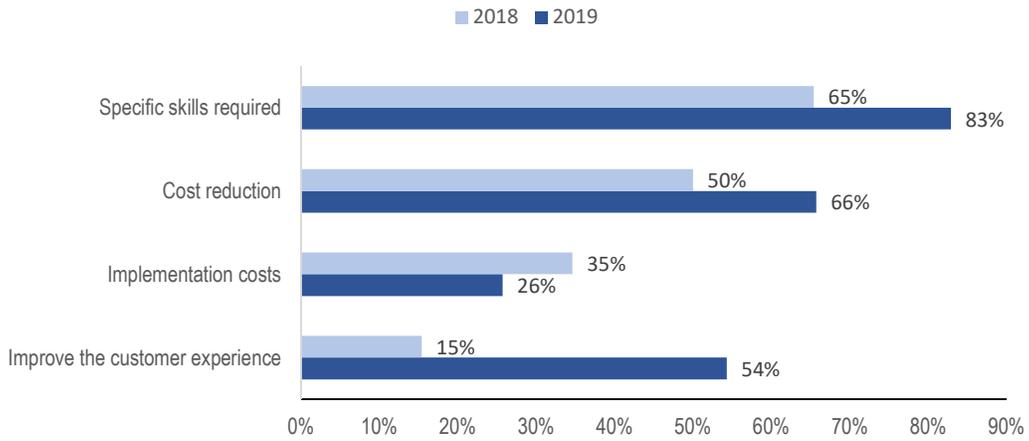


QUESTION: What are the reasons for hiring Outsourcing Services for Contact Center functions?

COMMENT: As noted in the previous study, the need for specific skills (83%) and cost reduction (66%), continue to be the main reasons for hiring Outsourcing Companies. Additionally, there is a significant growth in the intention to hire Outsourcing Services to improve the customer experience (54% instead of 15%).

Figure 52

**REASONS TO HIRE OUTSOURCING SERVICES (N=335)**

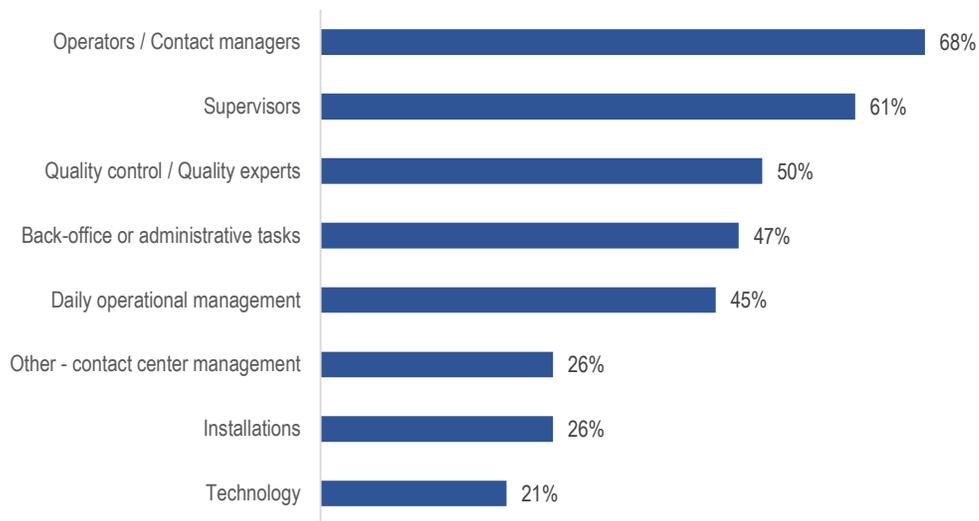


QUESTION: What services are contracted in the Outsourcing model?

COMMENT: Respondents who hire on an Outsourcing basis mainly resort to the services of Operators (68%), Supervisors (61%) and Quality Experts (50%). Installations (26%) and Technology (21%) appear with the least references.

Figure 53

**HIRED SERVICES IN OUTSOURCING (N=214)**

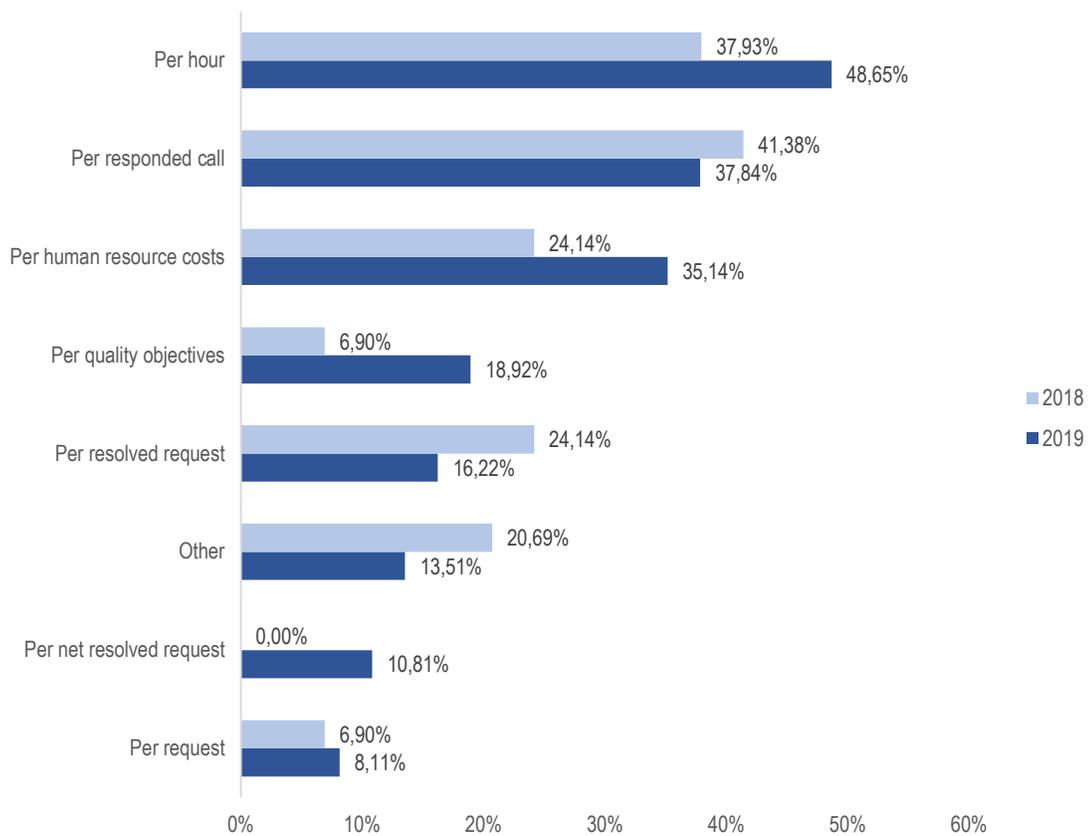


QUESTION: What is the Outsourcer's remuneration model?

COMMENT: The most common Outsourcing remuneration model among the 2019 sample was the “per hour” payment (48.65%). This represents a difference from what was observed in 2018, in which the most common model was “per responded call” (37.84% in 2019 instead of 41.38%). The “per resolved request” remuneration model registered the lowest value (8.11%). It is also important to note the significant increase in the model “per quality objectives” compared to 2018 (18.92% instead of 6.9%).

Figure 54

**OUTSOURCER'S REMUNERATION MODEL (N=179)**



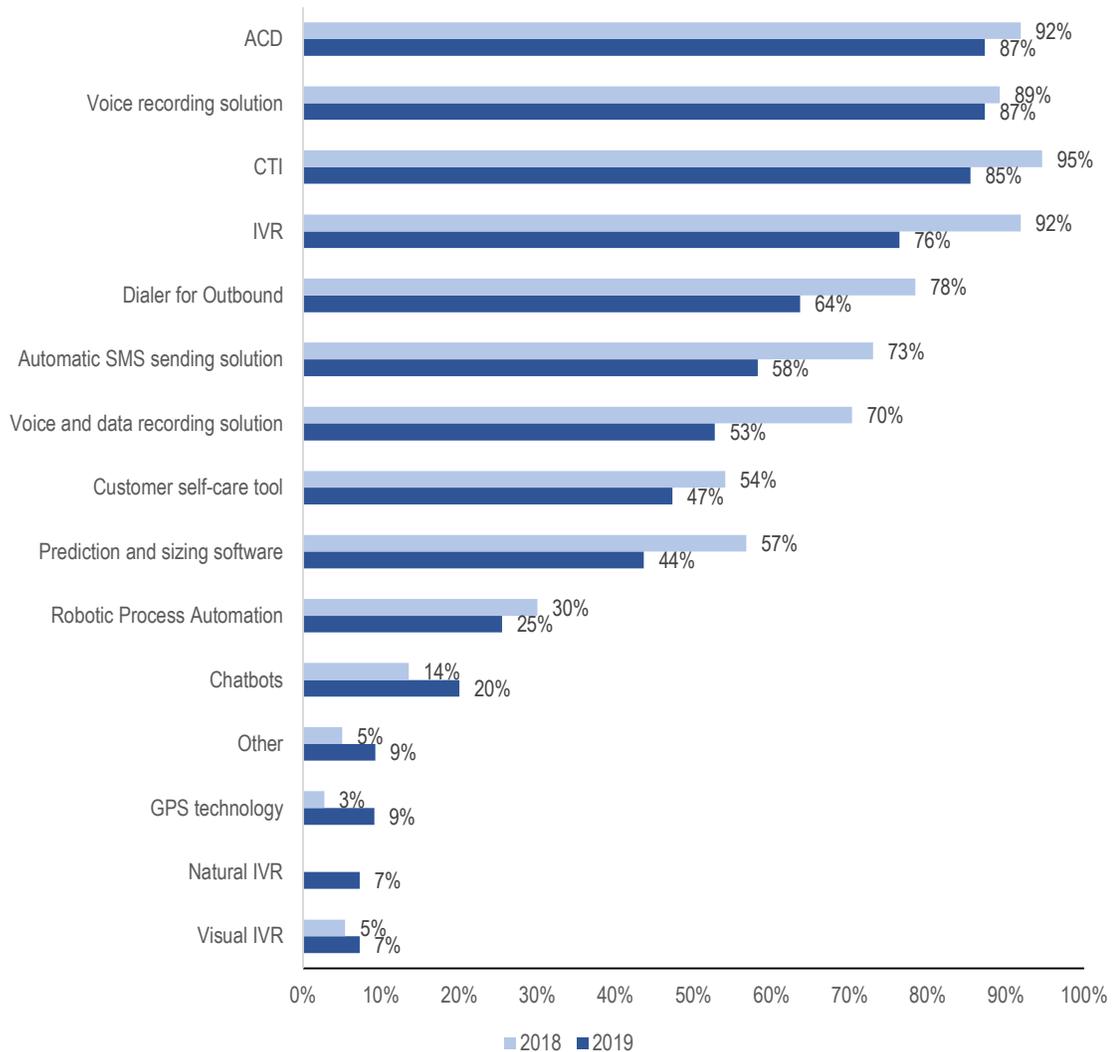
## 6 Technology

QUESTION: What are the main technological solutions used?

COMMENT: The technological solutions most used by the Contact Centers continue to be the ACD (87%), the Voice Recording Solution (87%) and CTI (85%). The least used solutions remain GPS Technology (9%), Natural and Visual IVR (both with 7%). It is also worth noticing the increase in the use of Web Chats from 14% to 20% in 2019.

Figure 55

### CONTACT CENTERS SOLUTIONS (N=722)

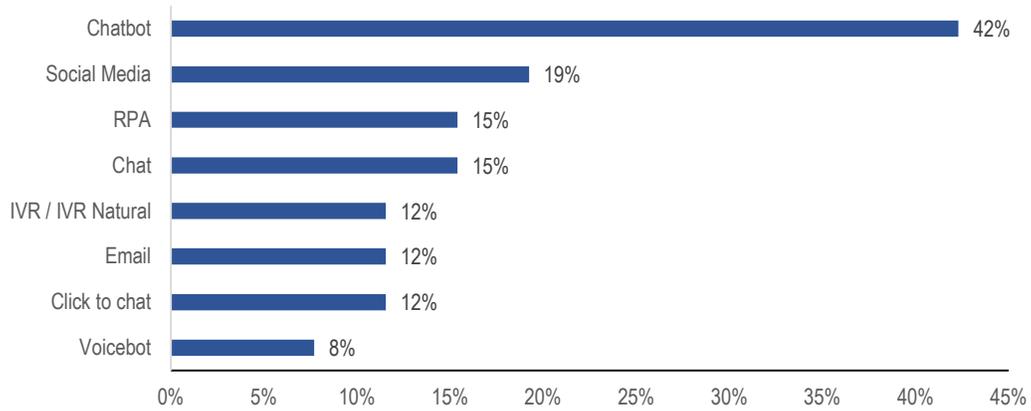


QUESTION: What new channels are you considering using in the future?

COMMENT: Regarding the adoption of new channels, approximately 42% of the sample intends to implement Web Chats, 19% Social Media, 15% RPA and 15% Chat channels.

Figure 56

**NEW CHANNELS TO USE IN THE FUTURE (N=294)**

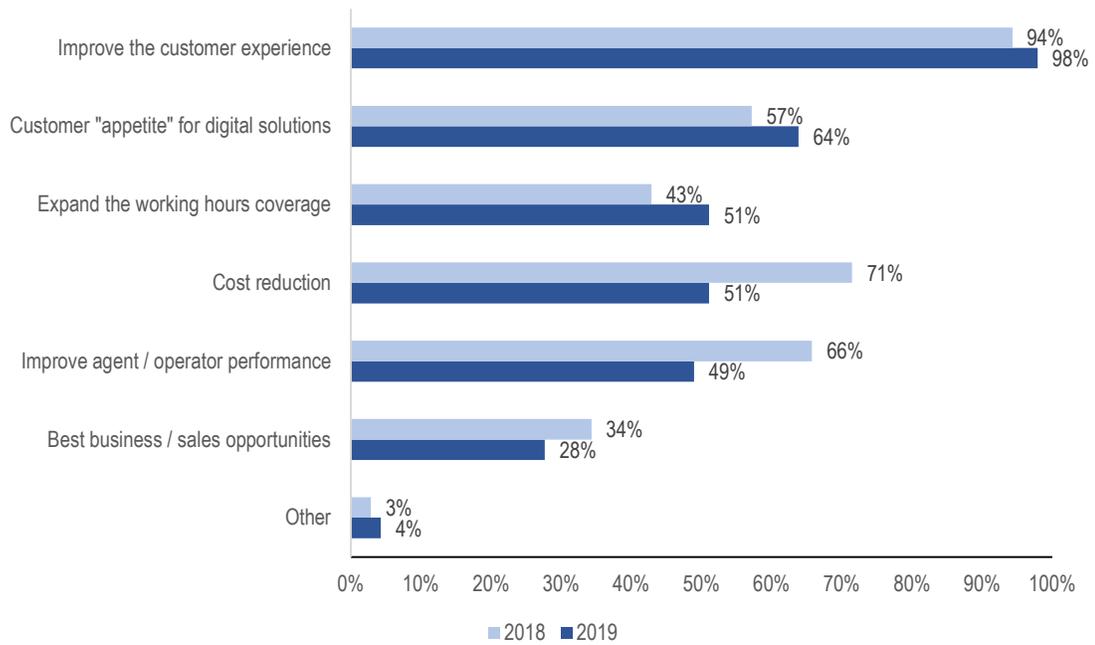


QUESTION: What are the main reasons for offering self-care tools / channels?

COMMENT: As in 2018, "Improving the Customer Experience" remains the main reason for Contact Center Companies to offer self-care tools (98%), followed by the "Customer "Appetite" for digital solutions" (64%).

Figure 57

**REASONS TO OFFER SELF-CARE TOOLS / CHANNELS (N=688)**

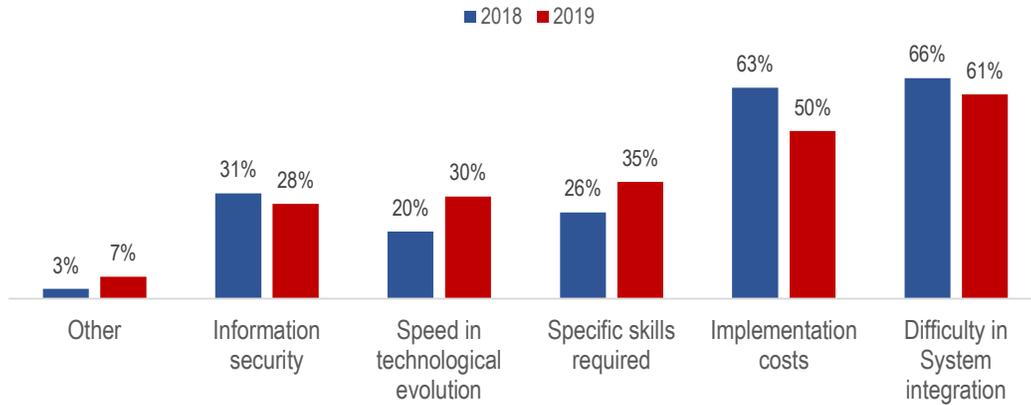


QUESTION: What are the biggest challenges to establish efficient self-care solutions?

COMMENT: As observed in 2018, the biggest challenges identified for the establishment of efficient self-care solutions were the difficulty in integrating systems (61%) and the cost of implementation (50%).

Figure 58

**CHALLENGES TO ESTABLISH EFFICIENT SELF-CARE SOLUTIONS (N=685)**

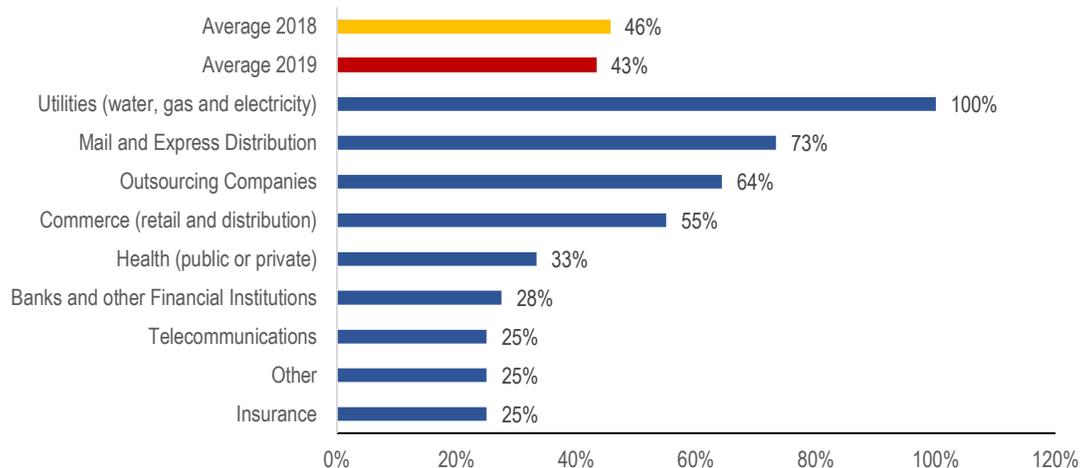


QUESTION: What is the percentage of a Cloud-based technology model, by sector?

COMMENT: On average, 43% of the surveyed sample uses Cloud-based technology models, showing a reduction of 3 percentage points in relation to 2018. With regard to use by sector, the Utilities sector uses this type of model entirety, followed by the Mail and Express Distribution (73%), Outsourcing Companies (64%) and Commerce (55%) sectors.

Figure 59

**USE OF A CLOUD-BASED TECHNOLOGY MODEL (N=236)**

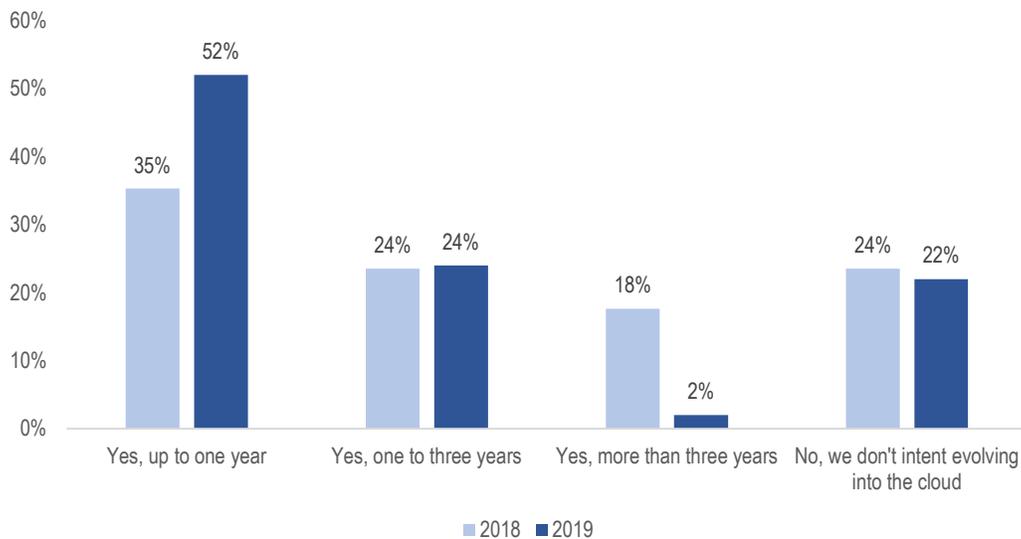


QUESTION: Do you intend to evolve your Contact Center to the Cloud?

COMMENT: In 2019 the trend towards a change to the Cloud model identified in 2018 continues to be verified. The number of Contact Centers that consider evolving to the Cloud in the long term suffered a significant reduction (2% instead of 18%), while there was a very significant increase in the percentage of companies that plan to evolve to the Cloud in the short term, already in the year 2020 (52% instead of 35%). It is also worth noticing that, despite this paradigm shift that resulted in greater urgency to change the model to the Cloud among the companies that were considering evolving, the percentage of companies that do not consider evolving to the Cloud remains similar, although it has decreased (22% instead of 24%).

Figure 60

**CONTACT CENTER EVOLUTION INTENT TO THE CLOUD (N=678)**

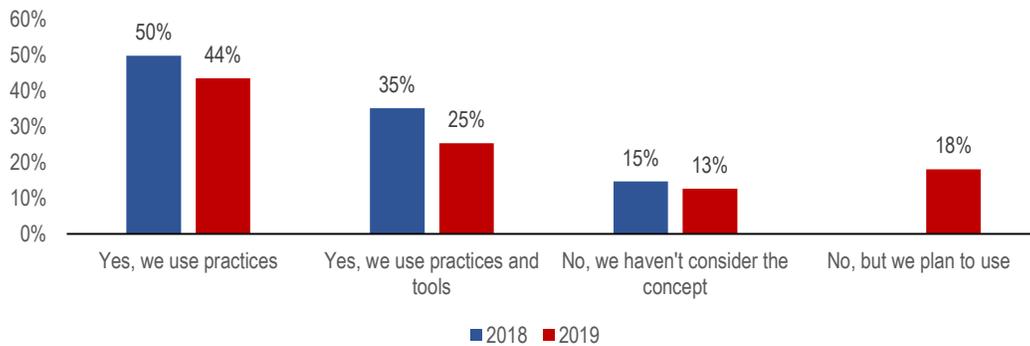


QUESTION: Does your organization use Gamification tools?

COMMENT: The percentage of companies that use Gamification practices and tools decreased compared to 2018 (44% instead of 50% and 25% instead of 35%). However, it is important to note that 18% of respondents plan to use these practices, although they have not yet implemented them.

Figure 61

**USE OF GAMIFICATION TOOLS (N=722)**



QUESTION: Do you currently invest in Robotic Process Automation? Do you plan to invest in the future?

COMMENT: In general, most of the companies surveyed do not invest in Robotic Process Automation, with 37% saying they use and continue to invest in this technology and 46% plan to invest in the future.

Figure 62

**INVESTMENT IN ROBOTIC PROCESS AUTOMATION (in 2019) (N=712)**

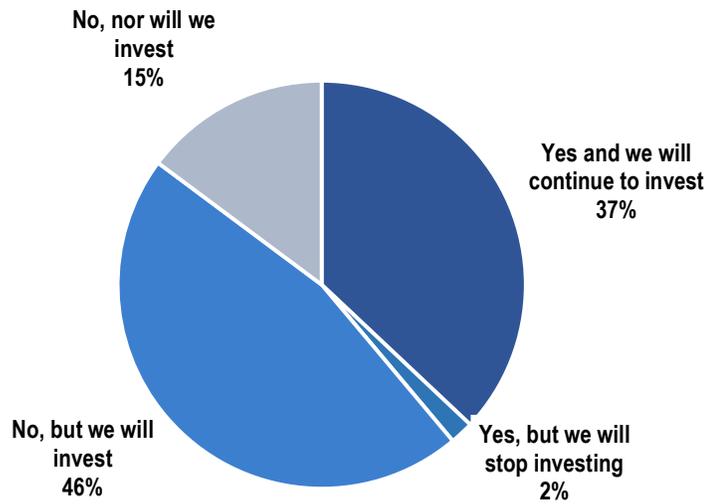
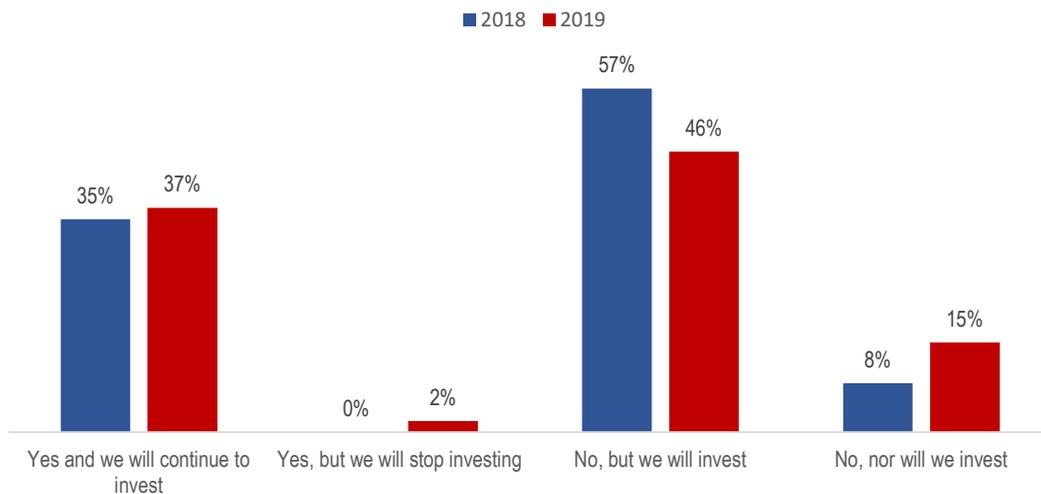


Figure 63

**INVESTMENT IN ROBOTIC PROCESS AUTOMATION (N=712)**

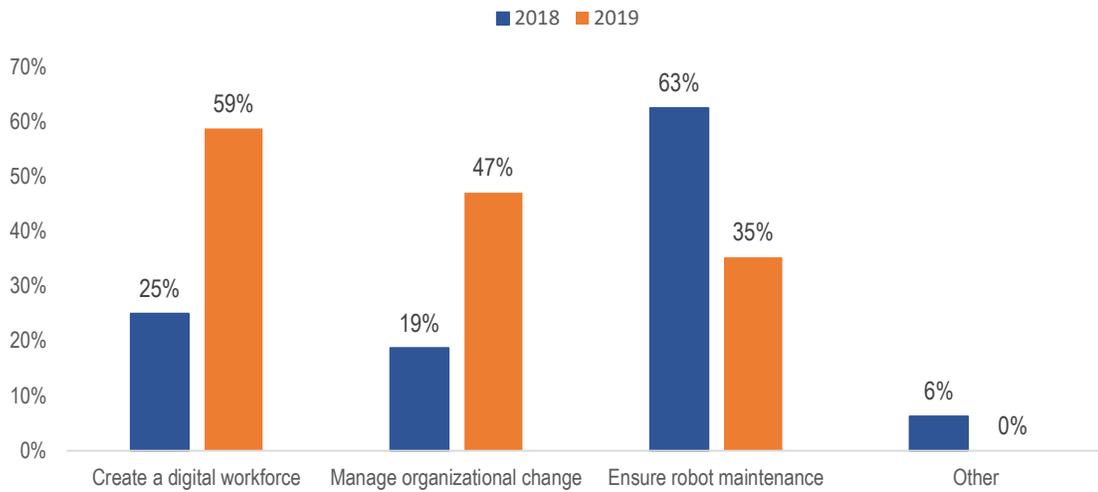


QUESTION: What are the biggest challenges you faced during an RPA project?

COMMENT: “Creating a digital workforce” (59%) and “managing organizational change” (47%) were identified as being the two biggest challenges faced in an RPA Project. “Ensuring robots maintenance” is also identified as an obstacle to RPA projects, although the percentage of respondents considering this challenge has decreased compared to 2018 (35% instead of 63%).

Figure 64

**CHALLENGES FACED DURING AN RPA PROJECT (N=254)**



QUESTION: Do you currently invest in solutions based on Artificial Intelligence? Do you plan to invest next year?

COMMENT: 35% of respondents invest in Artificial Intelligence and plan to continue investing in the next year, as seen in the previous year. It is also interesting to note that there are more companies interested in investing in Artificial Intelligence solutions, since there was a significant increase in respondents who do not have the technology, but who plan to invest in 2020 (39% instead of 27%) and a decrease in percentage of companies that do not plan to invest in this solution (26% instead of 33%).

Figure 65

**INVESTMENT IN SOLUTIONS BASED ON ARTIFICIAL INTELLIGENCE (N=712)**

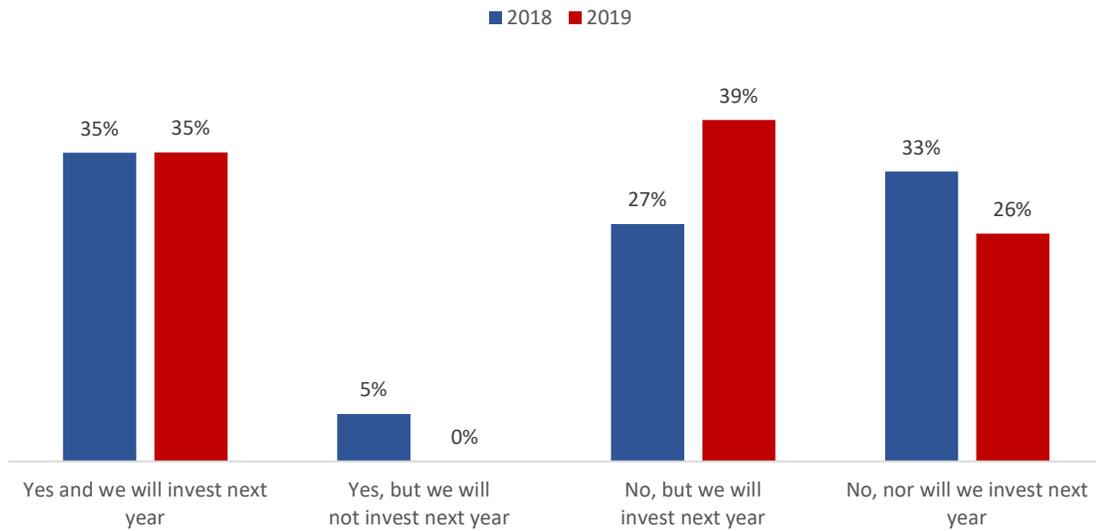
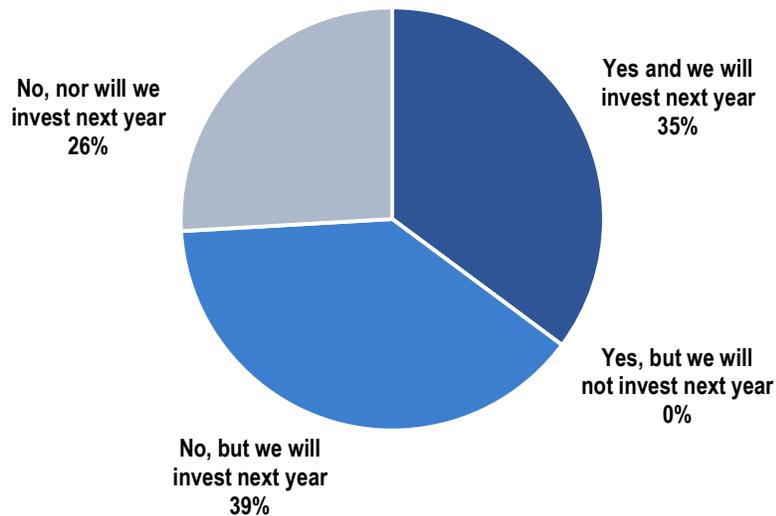


Figure 66

**INVESTMENT IN SOLUTIONS BASED ON ARTIFICIAL INTELLIGENCE (2019) (N=712)**



QUESTION: Do you have an Omni Channel solution? Do you plan to invest next year?

COMMENT: In 2019 there was a slight increase in the percentage of companies that invest and plan to continue to invest in Omni Channel solutions (72% instead of 70%), although there was also an increase in the percentage of companies that do not have this type solutions or even plan to invest in them (11% instead of 8%).

Figure 67

**OMNI CHANEL SOLUTION 2018 (N=142)**

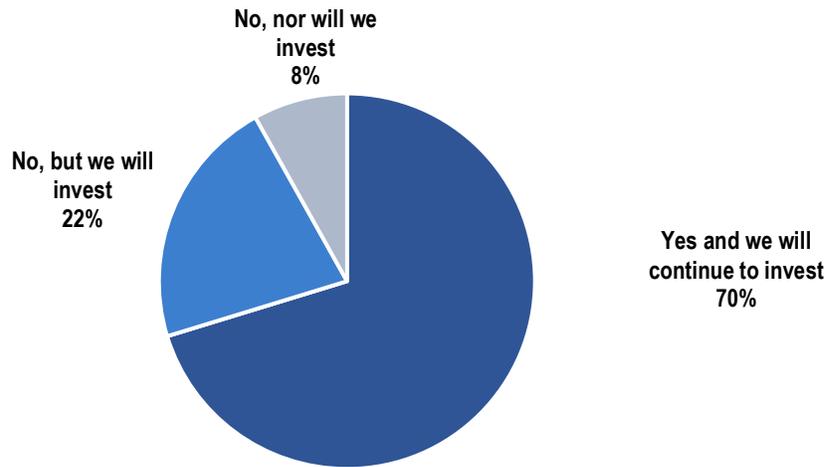
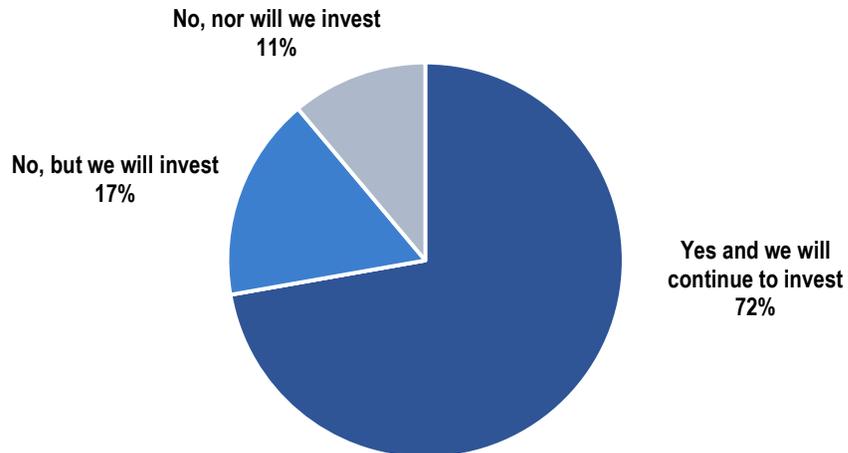


Figure 68

**OMNI CHANEL SOLUTION 2019 (N=712)**



QUESTION: Do you currently invest in Customer Experience Projects?

COMMENT: Investment in Customer Experience Projects fell in 2019, as the percentage of companies that use and plan to continue investing in this solution decreased significantly (73% instead of 81%), although there was an increase in the percentage of respondents who do not use it but plan to use it (24% instead of 19%).

Figure 69

**CURRENT INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (2018) (N=142)**

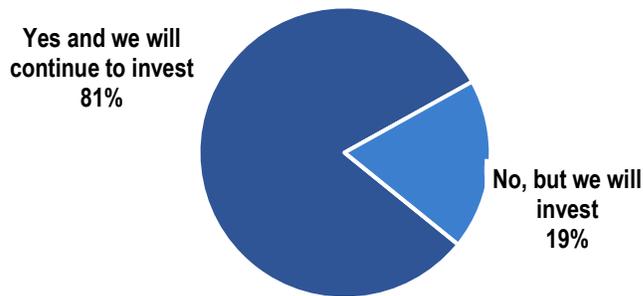
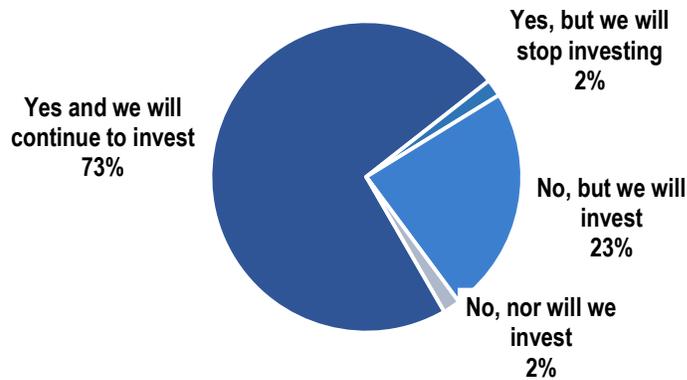


Figure 70

**CURRENT INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (2019) (N=722)**



QUESTION: Do you have a Speech to Text Solution? Do you plan to invest next year?

COMMENT: Regarding Speech to Text Solutions, 27% say they have a solution and are planning to continue investing (rising from 14% to 27% in 2019). On the other hand, the percentage of respondents who do not yet have this solution, but who plan to invest in the near future, decreased significantly compared to the previous year (43% instead of 61%).

Figure 71

**SPEECH TO TEXT SOLUTIONS (2018) (N=118)**

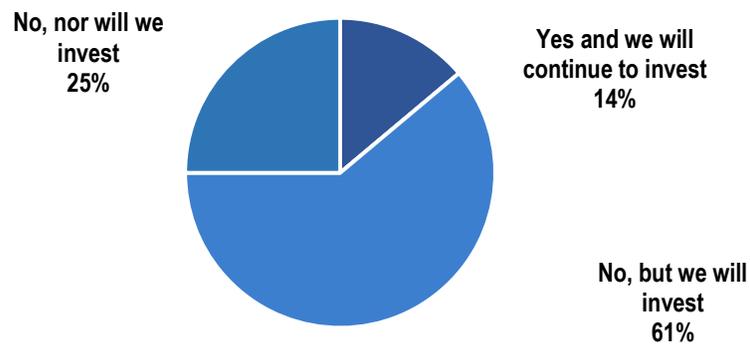
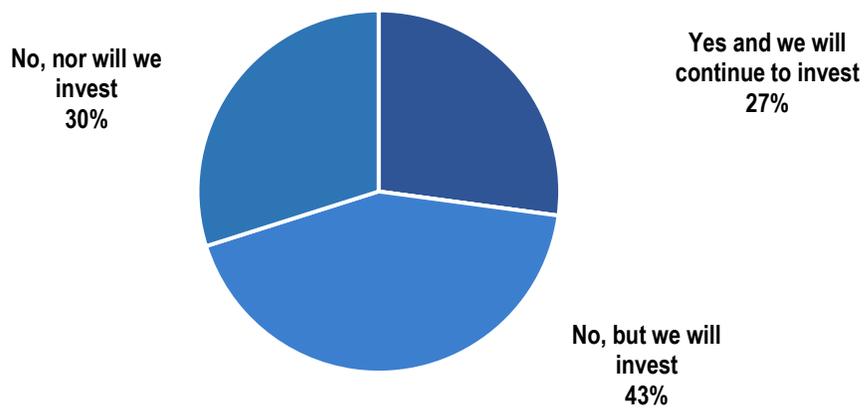


Figure 72

**SPEECH TO TEXT SOLUTIONS (2019) (N=682)**



## 7 Continuous Improvement

QUESTION: Are customer satisfaction surveys conducted to measure service quality? If so, what is the rating obtained in 2019, on a scale from 0% to 100%?

COMMENT: The percentage of companies that conducted customer satisfaction surveys decreased significantly compared to 2018 (79% instead of 94%). On the other hand, the classification of these same surveys showed a positive evolution from 79%, in 2018, to 82%, in 2019. The Travel Assistance (95%) and Health (90%) sectors were the ones with the best ratings, while Mail and Express Distribution (68%) and Telecommunications (74%) registered lower ratings.

Figure 73

### CONDUCTING SATISFACTION SURVEYS (N=422)

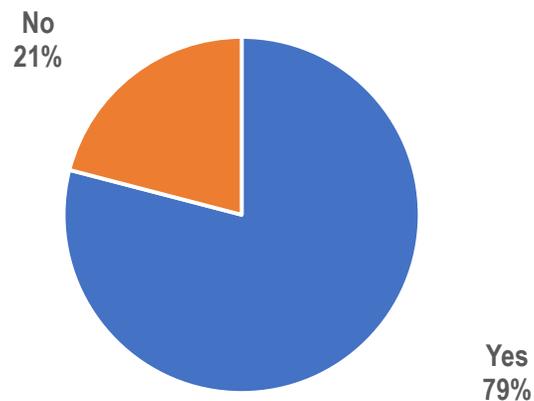
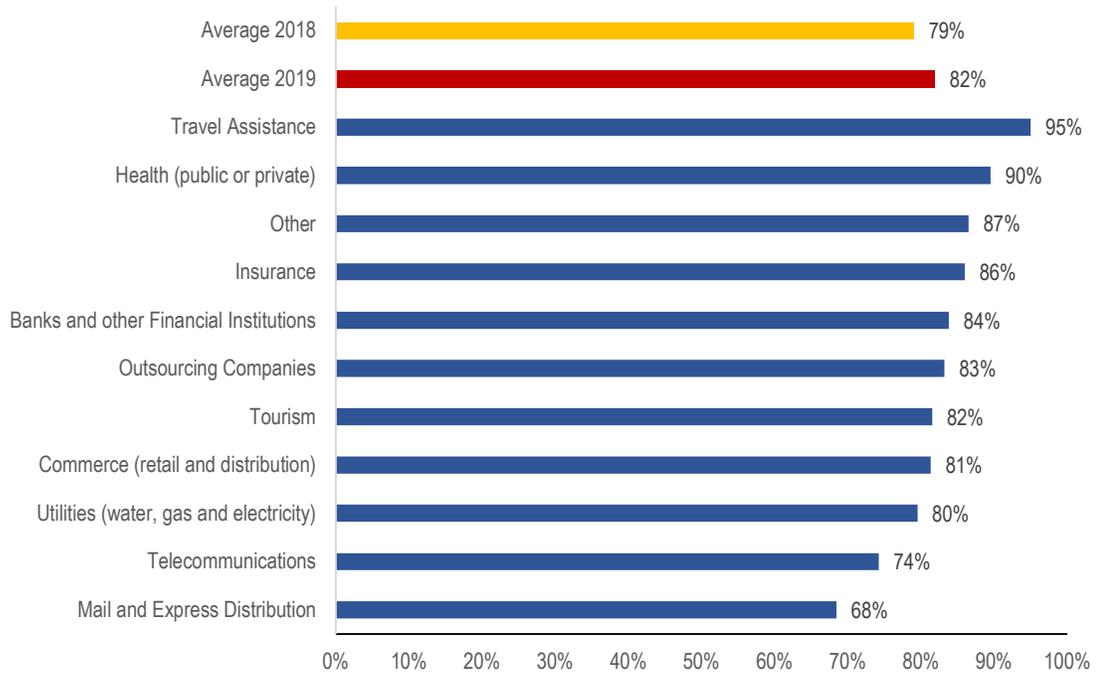


Figure 74

**AVERAGE CLASSIFICATION OF CUSTOMER SATISFACTION SURVEYS (N=422)**

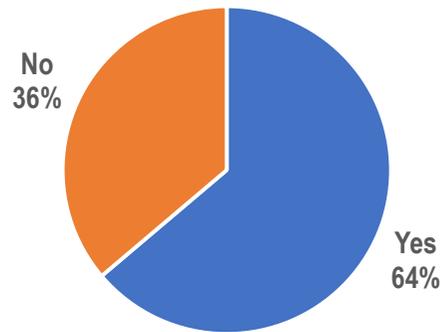


QUESTION: Is the Net Promoter Score (NPS) used to perform satisfaction surveys?

COMMENT: Among respondents to the survey, the percentage that uses NPS is 64%, registering a slight increase compared to 2018 (61%).

Figure 75

**USING NET PROMOTER SCORE (NPS) (2019) (N=472)**

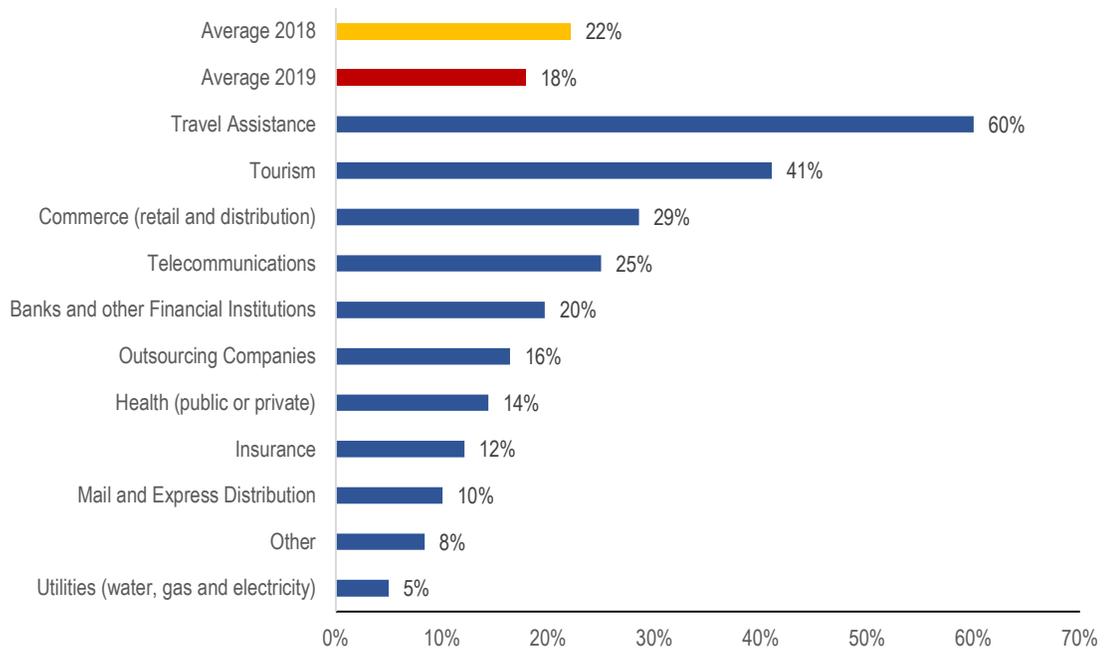


QUESTION: What is the percentage of calls in 2019 with quality measurement (through satisfaction survey)?

COMMENT: The average percentage of calls with quality measurement by the customer was 18% in 2019, registering a slight reduction compared to 2018 (it was 22%). The Travel Assistance sector registered the highest value (60%), while the Utilities sector registered the lowest percentage of calls assessed by the Customer (5%).

Figure 76

**PERCENTAGE OF CALLS THAT HAVE QUALITY MEASUREMENT ASSESSED BY THE CUSTOMER  
(N=303)**

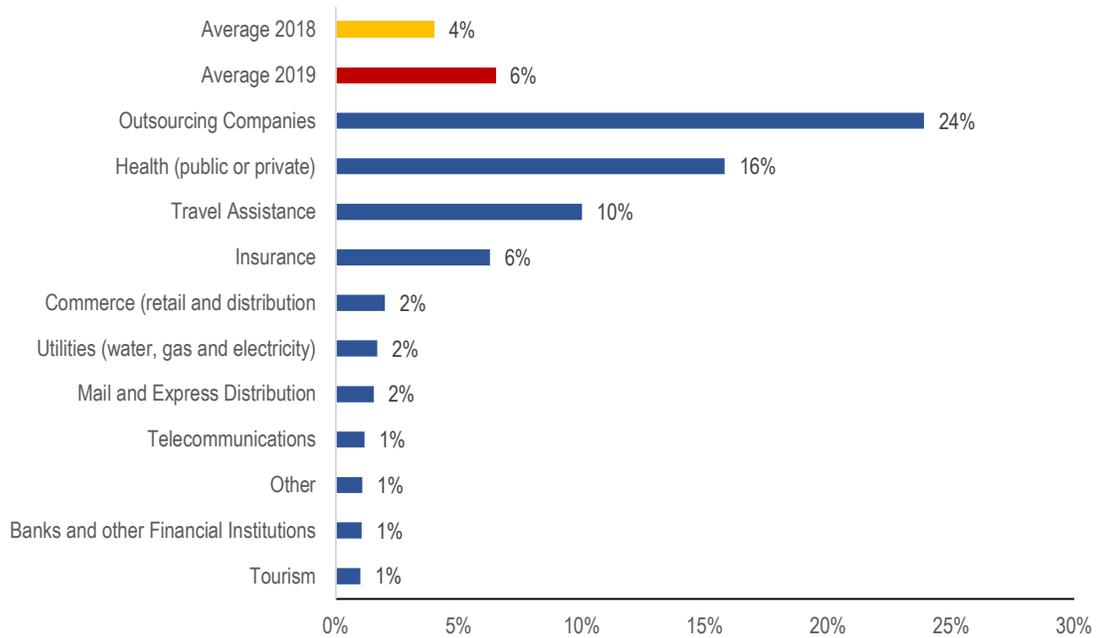


QUESTION: What is the percentage of contacts targeted by internal monitoring in 2019?

COMMENT: In 2019, the percentage of contacts targeted by internal monitoring increased from 4% to 6%. The sectors that contributed most were Outsourcing Companies (24%), Health (16%) and Travel Assistance (10%), with 7 sectors registering values equal to or less than 2%.

Figure 77

**PERCENTAGE OF CONTACTS TARGET IN INTERNAL MONITORING (N=314)**

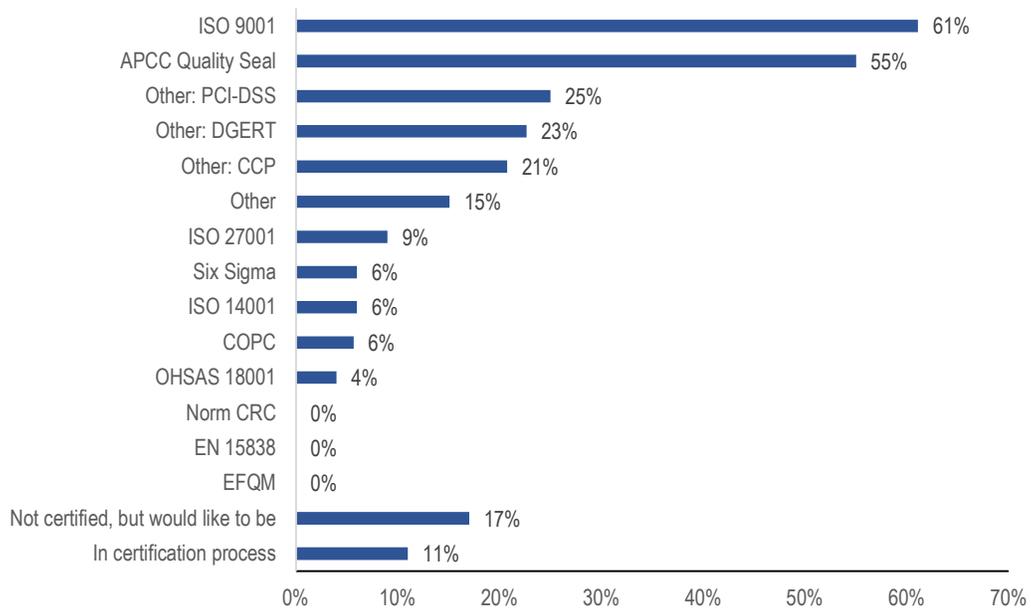


QUESTION: Which of the following certifications does the Contact Center have?

COMMENT: The most frequent certifications among the group of respondents are ISO 9001 (61%) and the APCC Quality Seal (55%), although in both cases the values recorded are lower than in 2018 (71% and 58%, respectively). On the other hand, the PCI-DSS and DGERT certifications registered a significant increase (25% instead of 8% and 23% instead of 11%, respectively). It should be noted that 17% of the respondents indicate that they do not have any certification, but want to have it and 11% indicated that they are in the certification process.

Figure 78

**KEY CERTIFICATIONS OF THE CONTACT CENTER (N=522)**

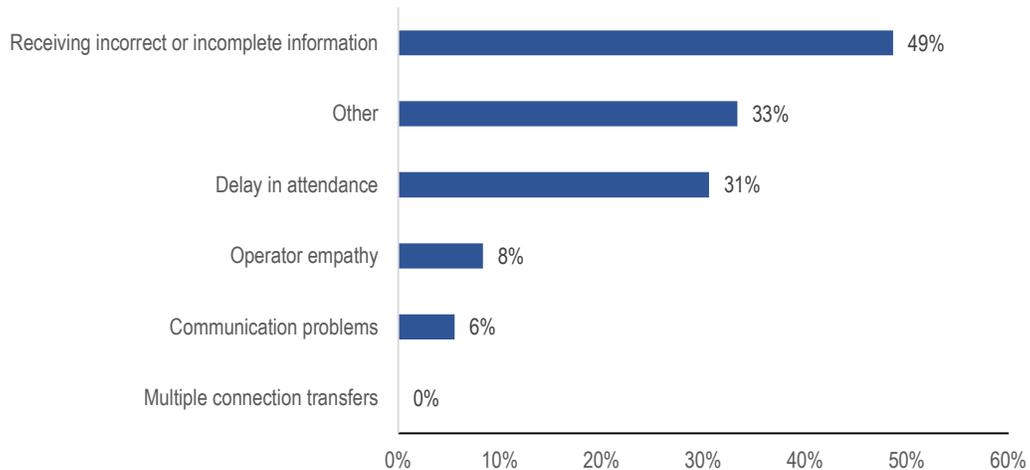


QUESTION: What are the main reasons for complaints received from the Contact Center service?

COMMENT: "Receiving incorrect or incomplete information" remains the most common reason for complaints in relation to Contact Centers (49%). However, it is interesting to note that, compared to 2018, there is a decrease in the percentages in all options, with the exception of "Other" (which includes billing problems or unavailability of immediate problem resolution), with the percentage of complaints due to "Communication Problems" (6%) and "Operator Empathy" (8%) registered very low values, which is a positive fact for the sector.

Figure 79

**REASONS FOR COMPLAINS RECEIVED FROM THE CONTACT CENTER SERVICE (N=433)**



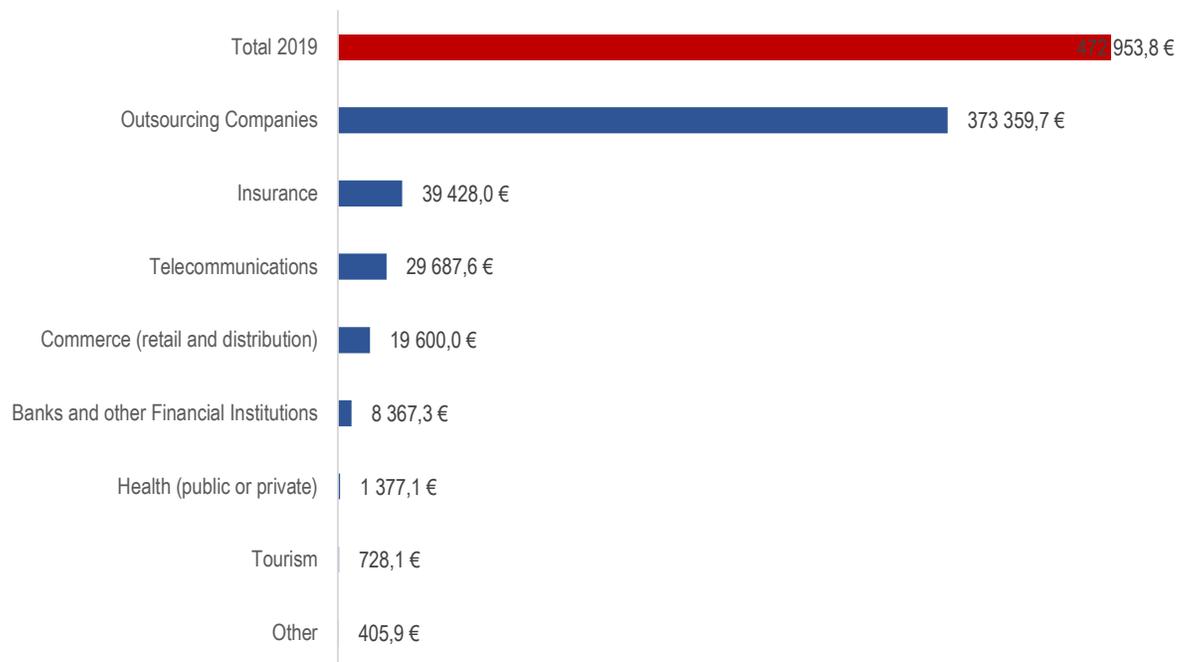
## 8 Financial Data

QUESTION: What is the Contact Center's annual turnover?

COMMENT: The answers to this question show a necessarily modest image of the true representativeness of this study since they result from a reduced number of responses in relation to the sample (458 operations). We must also bear in mind that the operations managed internally do not allow the identification of billing, although adding value to their organizations. Even so, the aggregate of responses obtained in 2019 totals 472.953 million Euros, of which about 80% correspond to the invoicing of Outsourcing Companies.

Figure 80

### BUSINESS TURNOVER OF THE STUDY SAMPLE (IN THOUSEND EURO) (N=458)

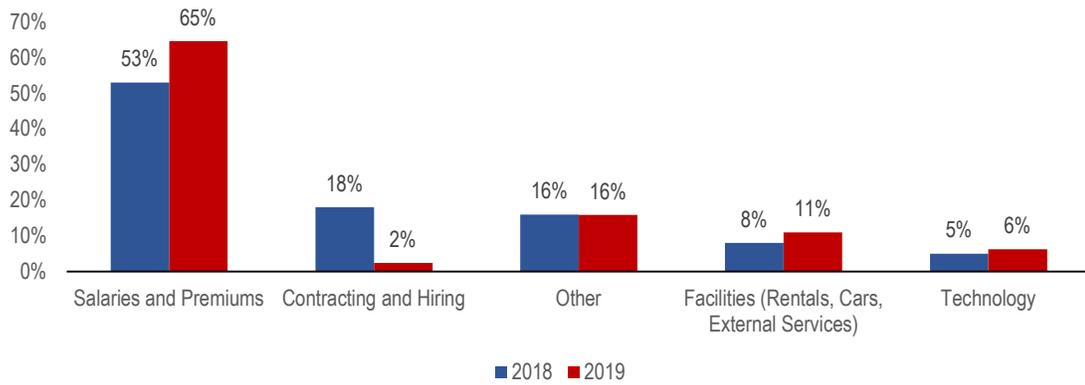


QUESTION: What is the distribution of the overall structure of OPEX operating costs by the main headings?

COMMENT: The main item in 2019 was "Salaries and Premiums", with 65%, rising compared to 2018. The remaining items recorded a percentage similar or slightly higher than in 2018, except for "Hiring and Training", which registered a very significant decrease, from 18% to 2%.

Figure 81

**OPEX DISTRIBUTION OVER THE PRINCIPAL ITEMS (N=425)**

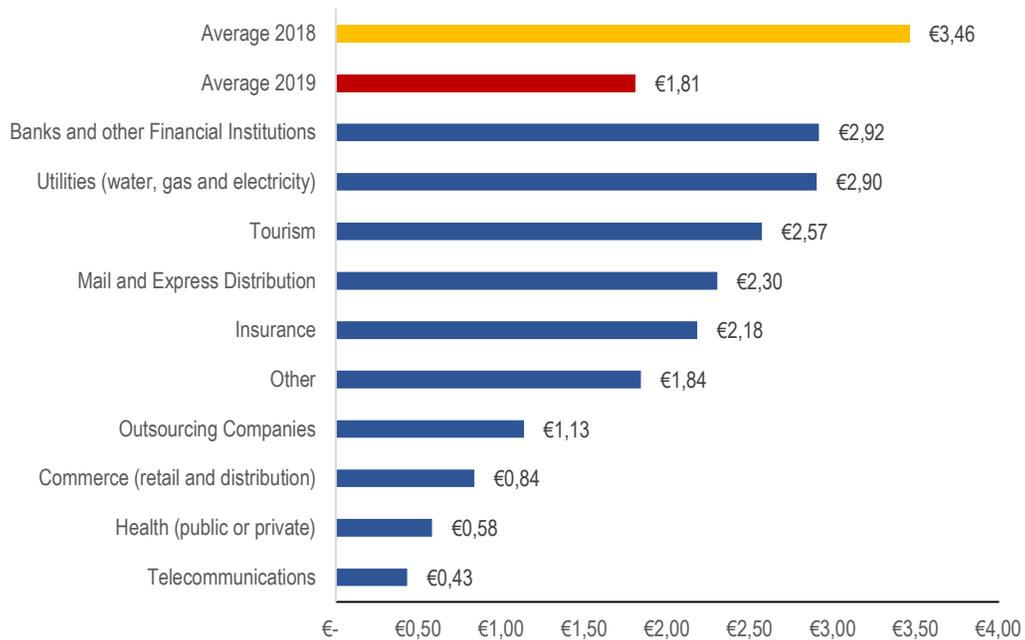


QUESTION: What is the average cost per contact?

COMMENT: In view of what was observed in the previous study, the average cost per contact saw a significant reduction, from 3.46€ to 1.81€ per contact. The sectors that recorded the highest costs were Banks and other Financial Institutions (2.92€) and Utilities (2.90€).

Figure 82

**OPEX COST PER CONTACT (N=213)**



QUESTION: What is the average cost per resolved request? (in euros)

COMMENT: The average cost per resolved request has decreased compared to the previous year (2.57€ instead of 5.31€). The sector with the highest costs was that of Outsourcing Companies (4.64€), while the Health sector was the one that registered the lowest value (0.58€).

Figure 83

**OPEX COST PER REQUEST SOLVED (N=195)**

