

2023

Estudo de Caracterização e Benchmarking

ATIVIDADE DE **CONTACT CENTERS**

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PREFACE

The annual Characterization and Benchmarking Study of Contact Center Activity is undoubtedly one of the initiatives of greatest impact of the APCC for the knowledge of the Sector and for the dissemination of the correct image of an Industry not always properly appreciated by the media and by some economic and social agents.

Carried out, without interruption, since 2006, this Study has become a reference instrument for all players in the industry, allowing to validate the positioning of each one before the respective sector of economic activity and, ultimately, identifying the weaknesses and strengths of each one and, consequently, the opportunities for improvement aiming at the final goal of any Contact Center operation: performance excellence. It is ultimately a key tool for decision-making.

As in previous editions, this year's edition of the Study compiles data from the previous year. 2022 was a particularly relevant year for our activity, as it was the first year freed from almost all the limitations forced by the pandemic, in the years 2020 and 2021. In this way, it is possible to show how much has recovered in relation to the *modi operandi* of 2019 and recognize the evidence of perennial changes, which are part of what has been called the new normal.

The evolution of this study, since 2006, is visible, on one hand, by the broadening of the scope of the targeted themes, but also, and mainly, by the increase in its representativeness, expressed in the number of operations that responded.

In fact, the response obtained from 1182 operations, involving 52,102 Employees, constitute a sample of 50.1% of the universe of Companies in our Industry and give the conclusions of the Study an indisputable degree of confidence.

The APCC appreciates the availability of all the Companies that responded, especially to our Associates. Only this availability allows the elaboration and dissemination of this important work tool for all those who are interested in the Sector, in Portugal and outside our country.

We must also highlight the commitment, rigor and competence put into the execution of this work by Happy Work and its technicians, which we are very grateful.

Ana Goncalves

General Secretary

METHODOLOGICAL NOTE

The 2023 edition of the Contact Center Activity Characterization and Benchmarking Study results from the response of 1,182 operations/service lines, operated by various Companies and Institutions from different sectors of activity. This volume of responses represents a continuation of the growth trend of previous years (1,058 in 2022, 932 in 2021, 722 in 2020).

The number of verified responses, of operations involving 52,102 Employees, before a universe of 104,000 Employees in the Industry, allows a degree of information security obtained statistically verifiable: Sample of 50.1% of the universe, degree of confidence of 99%, with a margin of error of 0.4%.

The Study maintains the structure used in previous years, being organized in its eight usual dimensions:

- Characterization.
- Operational Performance.
- Human Resources.
- Policies and Benefits.
- Resort to Outsourcing.
- Technology.
- Continuous Improvement.
- Financial Data.

The method used remained unchanged, the information collected is presented according to three dimensions – global analysis, analysis by economic sector and analysis by contact center service line. The treatment of the data follows robust mathematical methodologies that ensure the correct determination of the calculations for the three dimensions mentioned. The average values available in the Human Resources and Benefits Policies sections correspond to averages weighted by the number of Employees per sector of activity.

Finally, on behalf of APCC and Happy Work we wish to express our gratitude to all the Organizations that participated in this Study and to their representatives for their willingness to cooperate with this initiative.

EXECUTIVE SUMMARY

Framing

It is an honor for Happy Work to be the technical partner of the Portuguese Contact Center Association (APCC) in conducting the 2023 Benchmarking Study. This is the first study in which we can begin to assess the real effects of the pandemic in the medium to long term and not just its immediate effects. We do not talk about changing the use of the different channels only while the face-to-face has ceased to exist or has become heavily limited. Now we talk about the effects that this period had.

In the use of services, even after their total or practically total reopening. We do not talk about the home office while we have been forced to do so, but when nothing compels it anymore. Is the "new normal" a return to the past? Has everything changed completely? That's what we'll see next. The Benchmarking Study has been growing year after year and this is no exception, being clearly a representative Study of the sector. We are talking about more than 60,000 employees involved, in a universe of just over 100,000 workers in the sector. The number of service lines that participated in the Study is already close to 1200 (1182), which represents a growth of 12% over the previous year (1058).

Being an optional Participation Study, the response rate to the questions is not always 100%, so the comparison with previous years for example should be considered with some caution, since we may be comparing Companies and slightly different samples. The analysis included in the Study takes this into consideration and the number of Companies that answer each question is clearly identified in each chart. A special word to the APCC in trusting us to carry out this work and to all the participants in the Study, without whom it would not be possible.

Who responded to the Study?

The sectors with the highest representation in the Study are Outsourcers (30%), Banking (16%), Utilities (12%), Insurance (10%), Commerce (8%), Healthcare (8%) and Telecommunications (7%). The districts of Lisbon and Porto still concentrate 3/4 of the workers in the sector, but there is nevertheless a decrease in relation to the last Study, where the proportion was practically 4/5 (went from 79.6% to 74.6% of the total). Lisbon represents the majority (59.2%), with the second and third place clearly Porto (15.4%) and Braga (6.1%). Of the 33,367 service positions included in this study, 81.4% belong to Outsourcing Companies.

What are contact centers for?

Customer Service (82%), Backoffice (66%), Complaints Management (51%), Telemarketing/Outbound Sales (44%), Technical Support (41%) and Cross Selling and Upselling (36%) stand out.

How do we interact with Customers?

Whoever predicted that letters and faxes would be part of history has a point. But whoever said the same about the phone or email didn't (yet). If the call center that only answered calls practically ceased to exist, this was due to the growth of new channels that were being absorbed by the Contact Center and not to the decrease in calls.

All contact centers included in this study answer inbound calls. And more than half also respond to social media, IVR Self Service and Chat. The weight of calls on total contacts has been increasing, curiously, from 27% to 35% of total contacts in two years. Of the "new channels", only chat shows consistent growth. Social media and Website/Apps as well as IVR have lost some relative weight.

Inbound and Outbound

Inbound calls represent just over 2/3 of total calls, a figure that has been declining with the growth of outbound. The average duration of calls is, in all sectors, considerably lower in outbound than inbound.

This difference is more significant in the Post Office and Express Distribution and less in the Bank. In the global average, the outbound is around 4 minutes and the inbound is 5'30".

STUDY

How has the relationship with the Customer evolved?

The post-pandemic stabilization of contact centers has lifted restrictions on their normal operation but has accentuated the difficulties of maintaining Human Resources. Despite the difficult context, the results are overall very positive:

- The waiting time to be served continues to decrease, which is particularly significant (it went from 75 in 2020 to 64 in 2021 and 50 seconds in 2022).
- The average request resolution time has also been decreasing very significantly, having been over 10 hours in 2020, and now below 4. The resolution of complaints, however, is being more difficult to reduce and is currently at 2.3 days.
- The average rating of satisfaction questionnaires remains close to 80%.
- The resolution at first contact remains around 85% and the success of Retention calls close to 50% (inbound) and just over 30% (outbound). Also, the percentage of successful Sales stabilized at 17%;
- About the reasons that lead Customers to make a complaint, the most common are incorrect or incomplete information, billing and charges and failures and technical problems.

What about people?

Rotation. Rotation. Rotation. Surely the most repeated word in our industry in the last year. And our study proves it very clearly: rotation had even been declining during the pandemic, reaching below 20% in 2021. It is now at 48.2%. This is even higher than 50% in Outsourcers but quite high in almost every other industry.

Perhaps even more troubling is the jump in supervisor rotation, which went from 8 percent to 21 percent in one year. For this reason, the ratio of supervisor to staff per operator has decreased, which means that management teams now have more people in their "charge" and, naturally, the average seniority of employees has decreased. Also predictably, the average time used to train an employee decreased to an average of 20 days, and this value is very variable depending on the sector.

Absenteeism has been showing a gradual upward trend over the years and is now close to 10%. Even with these difficulties, the number of people in the sector continues to increase, representing the current Study about 60,000 employees, and the average classification obtained in the satisfaction surveys carried out, is stabilized in high values.

Remote or face-to-face?

Compared to 2021, when almost 2/3 of the teams were working 100% remotely, the reality of 2022 is considerably different – around 30% remain 100% remote, but 32% are now in fully face-to-face mode.

The remaining 38% are in a hybrid model. Regarding the forecast for the future model, it is pointed to a stabilization in the 33% fully face-to-face, with a decrease from 30% to 26% in fully remote work in favor of the increase of the hybrid model, which will be the regime of a little more than 40% of the total employees.

The difficulty in retaining people affected Formation?

The number of training hours and existing programs is very comparable to previous years. The decrease in the availability of resources has not affected the number of hours of annual training very decisively. However, the decrease in average seniority, in normal situations, would imply an increase in them, which was not the case.

What about salary?

Salaries, as a rule, have remained among those who responded to the Study in 2022 and now. Even assuming that there are differences in the sample (there always are), one would expect a significant increase in salaries, due to the combined effect of the increase in inflation and the need to increase the retention of people.

How has Outsourcing evolved?

The use of Outsourcing is stabilized around 70% of the Companies that responded to the questionnaire. 24% will not do so and the rest may yet change the situation. The specific competencies of Outsourcer continue to be the main reason pointed out for the use of this model. The remuneration of the Provider tends to be increasingly diversified, but the predominance of the cost per resource, per hour and per call answered is still maintained.

How has the technological evolution been?

Contact centers have been evolving technologically at a good pace, but in most cases, without sudden and untested innovations. The evolution of channels is clear, so is the adoption of technology, but at a pace controllable by operations. Of the main solutions t, Dialer, IVR, Voice and Data Recording, Automatic SMS Sending and Self-care Tools are referred to by most. CRM, forecasting/sizing software and RPA still have a presence between 1/3 and half of the contact centers. IVR Natural, Marketing Automation and GPS a little less. Regarding the solutions to be implemented, the Natural IVR is the most mentioned, and the references are still significant, especially to Self-care and RPA.

Of the new channels to be used in the future, WhatsApp stands out, referred to by almost 50% of Companies.

Other conclusions that can be drawn from this 2023 Study in the technology component:

- Although the use of Bots has stabilized, the truth is that they are increasingly effective at resolving customer requests. From 2020 to 2022, the resolution went from 21% to 45%. Of all the solutions surveyed, these are clearly the ones with the highest forecast of future investment.
- The main difficulty for the establishment of self-care solutions is no longer the costs involved to become the difficulty of systems integration.
- The Cloud is unstoppable – it has gone from 41% (2020) to 52% (2021) and now 76% (2022) of the solutions used in Enterprises.
- Gamification is consolidated – usage has decreased over the years, currently being close to 30%, but there is a considerable group of companies that still intend to do so.
- Investment in RPA has been increasing, with 55% now reporting its use. The growth margin has naturally been decreasing as penetration increases.
- The penetration of Artificial Intelligence, as well as Machine Learning or Speech to Text is somewhat lower and its growth has also been slower, but the growth trajectory will continue.

Big trends

- Average response times have improved considerably.
- Turnover has increased rapidly and affects the sector, requiring adjustments at all levels – training, investment in automation, human resource management, ... it has not, however, affected salaries in the way that would be expected, something that will surely be adjusted in the coming years.
- The concentration of Contact Center in Lisbon, although still very high, has been decreasing.
- The dominant work model tends to be hybrid (about 40%) being a little more than 30% fully face-to-face and a little less than 30% fully remote.
- The growth of new non-telephone channels has been slowing. The phone is growing again with some level of sophistication, as well as all kinds of automation solutions.
- Generally, the adoption of technological solutions has varied rhythms, however, cases of divestment are very rare once the solutions are implemented.

Manuel Alçada

Executive Director | Happy Work

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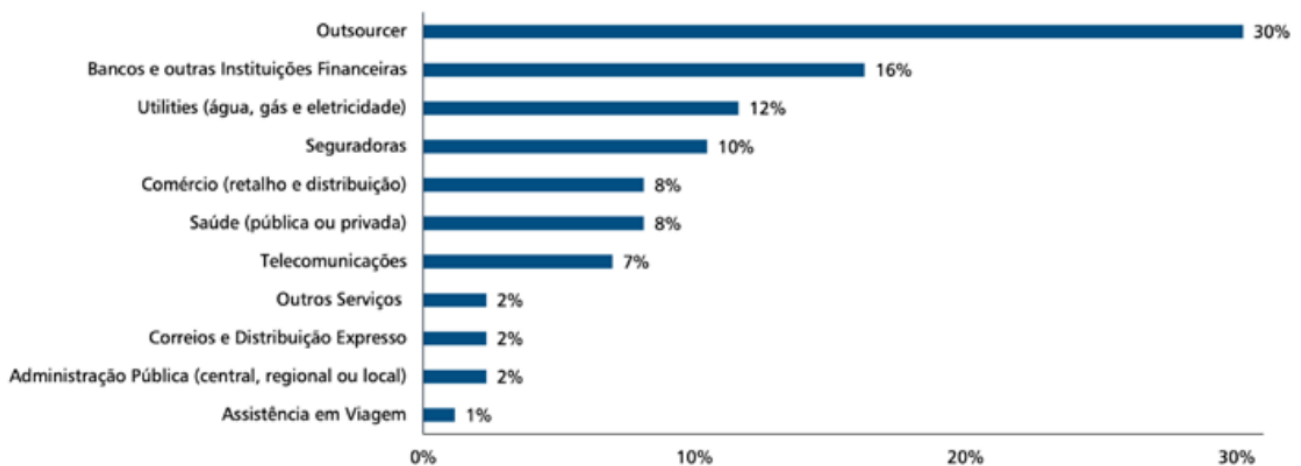
STUDY

1 - Characterization

QUESTION: How many operations are involved in this response?

COMMENT: The 2023 Characterization and Benchmarking Study was answered by 1182 service lines, operated by companies from different sectors of activity. This number represents an increase of about 12% compared to the volume of responses in the previous year (2022 - 1058 lines). Outsourcing (30%) and various sectors of activity responded with special emphasis on Banks and other Financial Institutions (16%), Utilities (12%), Insurance (10%), Commerce (8%), Health (8%) and Telecommunications (7%).

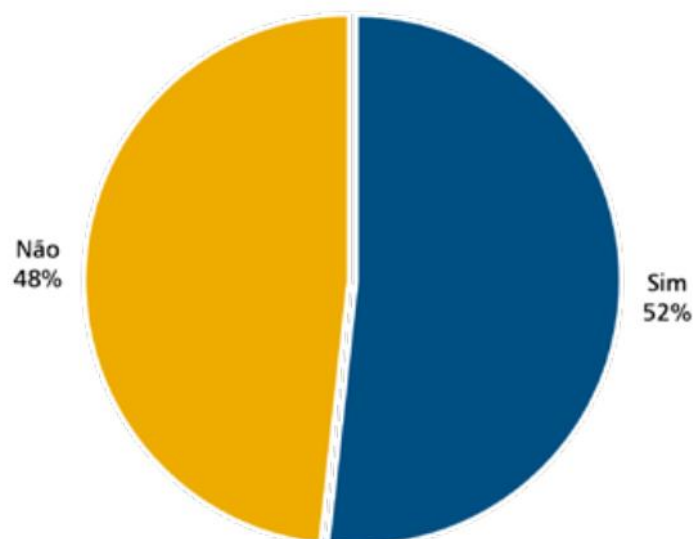
Figure 1 - ACTIVITY SECTOR (N=1182)



QUESTION: Is the nature of the Company Outsourcing?

COMMENT: 52% of the Contact Center operations that responded to the questionnaire operate on an Outsourcing basis, reflecting a reduction in the percentage weight that occurred last year (58%).

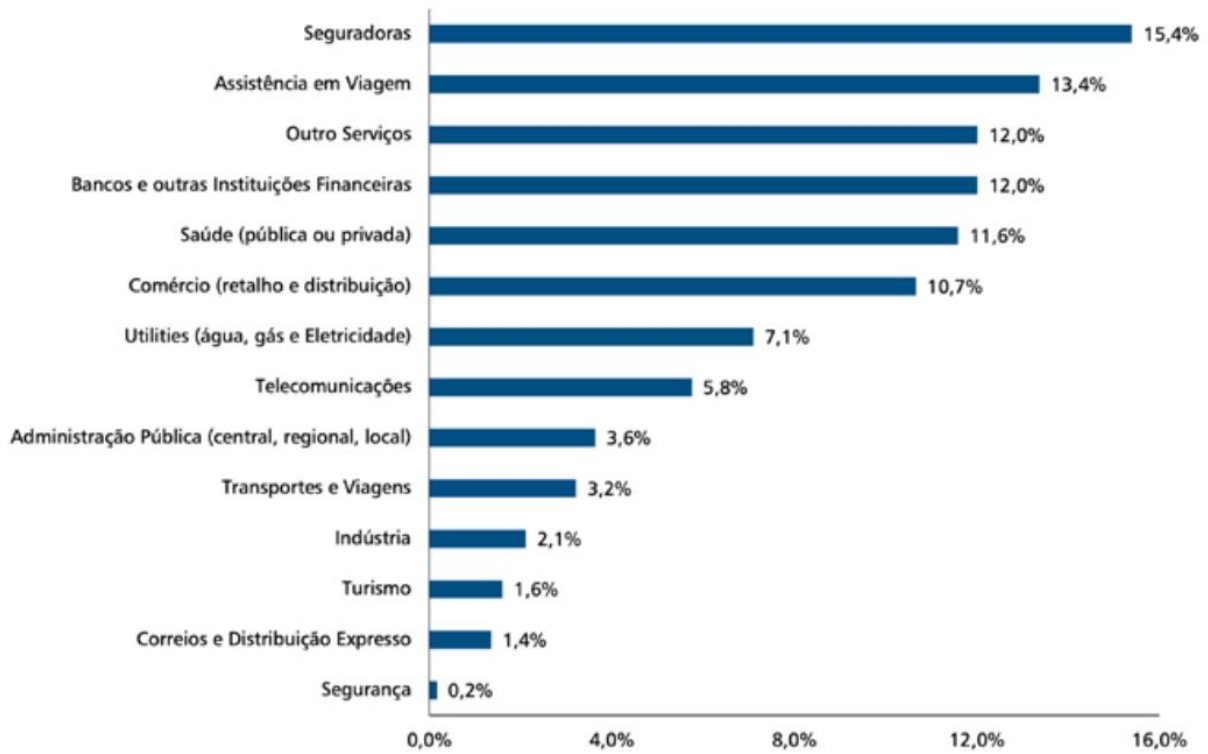
Figure 2 - NATURE OF THE OUTSOURCING OPERATION (N=1182)



QUESTION: What is the number of operations/lines per sector of economic activity?

COMMENT: The sectors with the largest number of service lines are Insurance (15.4%), Travel Assistance (13.4%) and Banks and other Financial Institutions (12.0%).

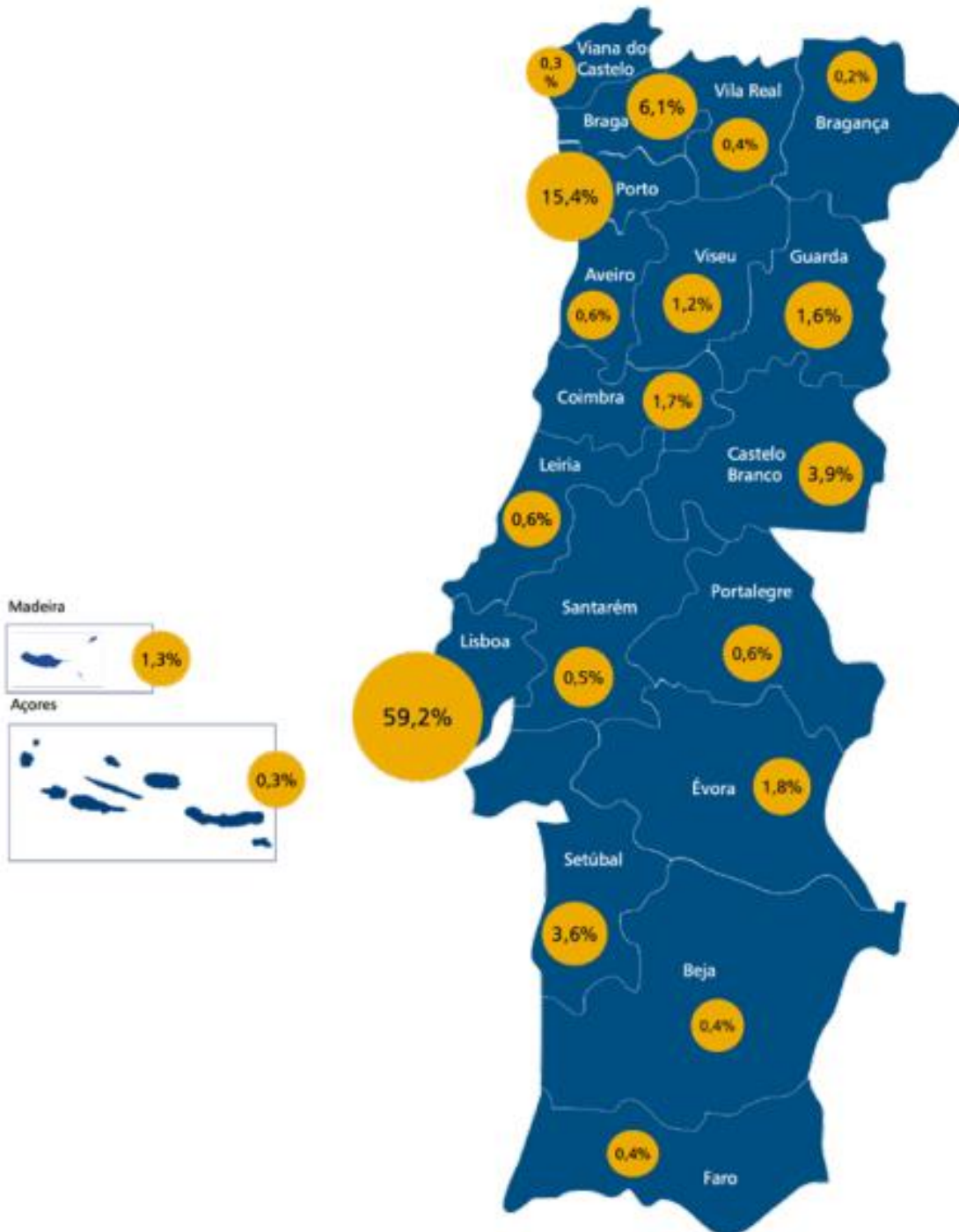
Figure 3 - DISTRIBUTION OF LINES BY SECTOR OF ECONOMIC ACTIVITY (N=1182)



QUESTION: What is the number of Human Resources in office in each district?

COMMENT: The distribution of the Human Resources of this Industry, by District and Autonomous Region, continues to be concentrated mainly in Lisbon (59.2%), Porto (15.4%), Braga (6.1%), Castelo Branco (3.9%) and Setúbal (3.6%). It should be noted that Lisbon and Porto total almost 3/4 of the sector's Employees, however their relative weight has decreased appreciably from 79.6% in the 2022 Study to the current 74.6%. The regions that benefited the most from this reduction were Setúbal (from 1.4% to 3.6%), Castelo Branco (from 3% to 3.9%), Viseu (from 0.5% to 1.2%), Madeira (from 1.7% to 2.3%) and Braga (from 5.6% to 6.1%).

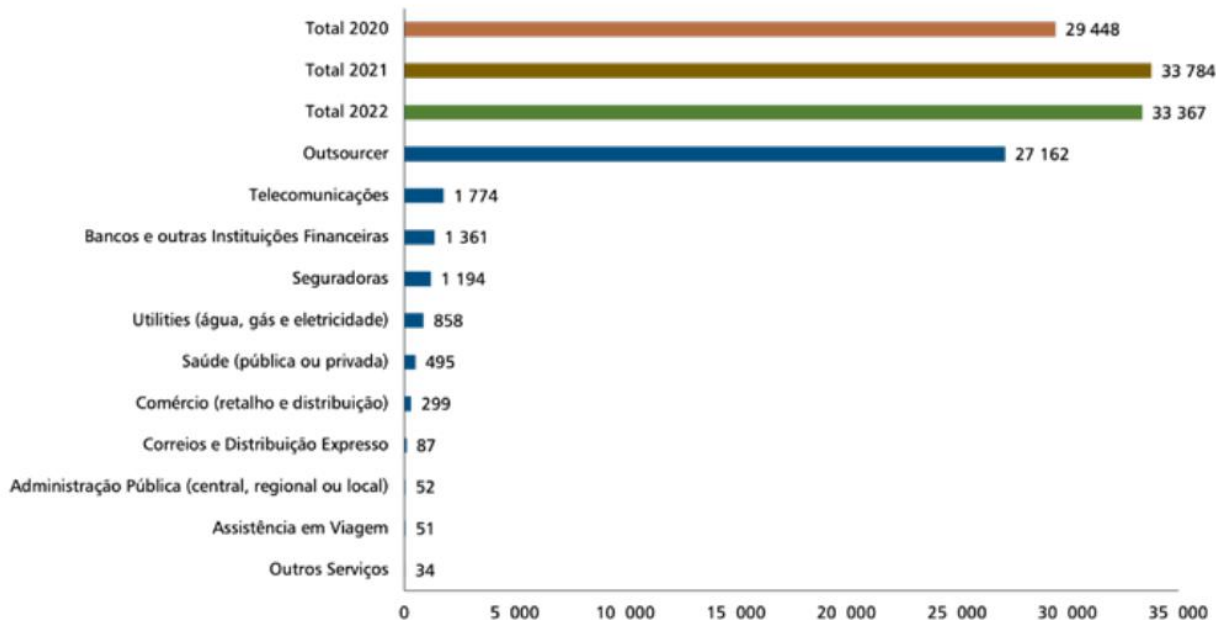
Figure 4 - DISTRIBUTION OF HUMAN RESOURCES BY LOCATION (N=1182)



QUESTION: What is the number of contact center service positions (including Front Office and Back Office positions)?

COMMENT: The number of service positions stabilized above 33,000 positions, with a slight decrease from the previous year (from 33,784 to 33,367). Outsourcers have 81.4% of the positions.

Figure 5 - NUMBER OF SERVICE POSITIONS (PAS) IN THE CONTACT CENTER (N=1170)



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

COMMENT: Among the functions performed in the Contact Centers are Customer Service (82%), Back Office (66%), Complaints Management (51%), Telemarketing/Outbound Sales (44%), Technical Support (41%) and Cross Selling and Up Selling (36%)

Figure 6 - MAIN FUNCTIONS OF THE CONTACT CENTER (N=1175)

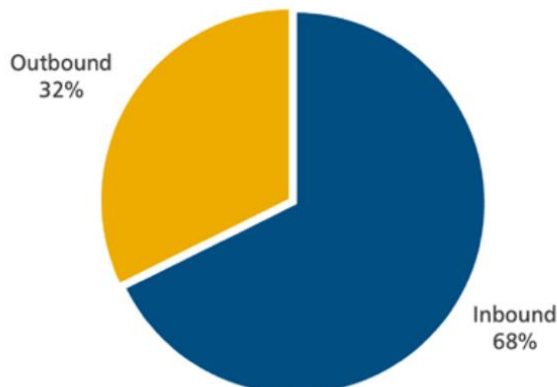


2 - Operational Performance

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

COMMENT: The relative weight of inbound calls, while clearly in the majority, dropped from 76% to 68% between 2021 and 2022.

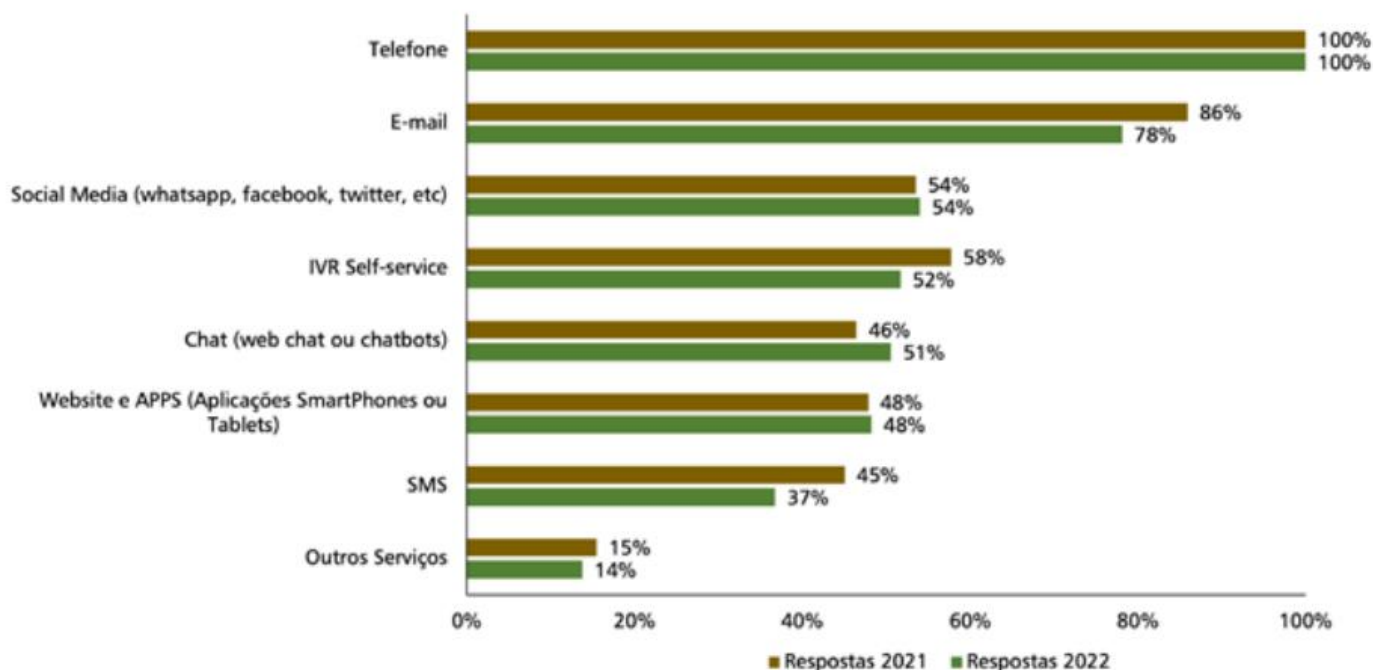
FIGURE 7 - INBOUND VS. OUTBOUND CONTACTS (N=1113)



QUESTION: What channels does the Contact Center provide to the Customer?

COMMENT: The Phone continues to be made available by all Companies that responded to the Study, as it was in the previous year. They would decrease the availability of Email (78% instead of 86%), IVR Self-service (52% instead of 58%) and SMS (37% instead of 45%). On the other hand, the availability of Chat increased (from 46% to 51%).

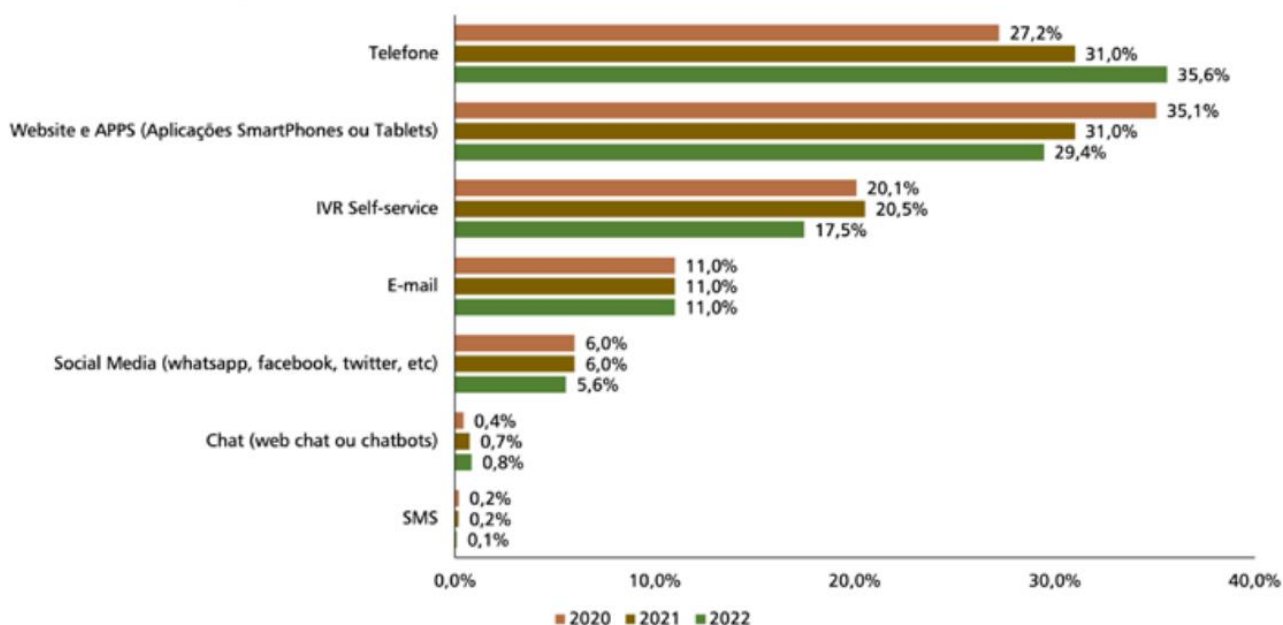
FIGURE 8 - CHANNELS PROVIDED BY THE CONTACT CENTER TO THE CUSTOMER (N=1170)



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

COMMENT: The telephone channel continues to increase its relative weight in the post-pandemic, already accounting for 35.6% of the contacts presented in this Study. (27.2% in 2020 and 31% in 2021). On the contrary, Website and APPC (29.4%), IVR Self-service (17.5%) and Social Media (5.6%) have been decreasing their relative weight. Email has a stable value. Chat has been increasing its weight from a lower base (0.8% in 2022).

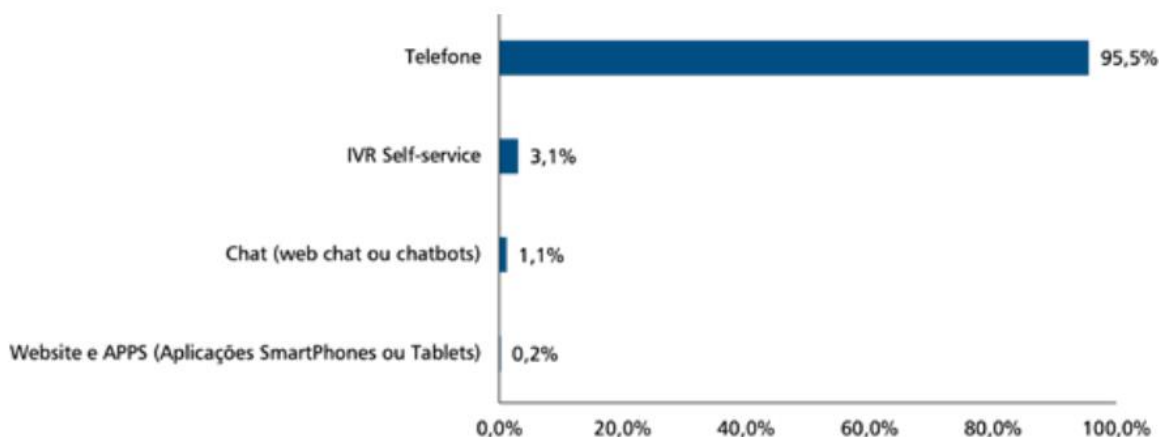
FIGURE 9 - DISTRIBUTION OF CONTACTS OF AN INBOUND NATURE (N=902)



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

COMMENT: Among the total of abandoned Inbound contacts, the Phone represented 95.5%, followed by the IVR Self-service channel (3.1%), Chat (1.1%), finally the Website and APPS (0.2%).

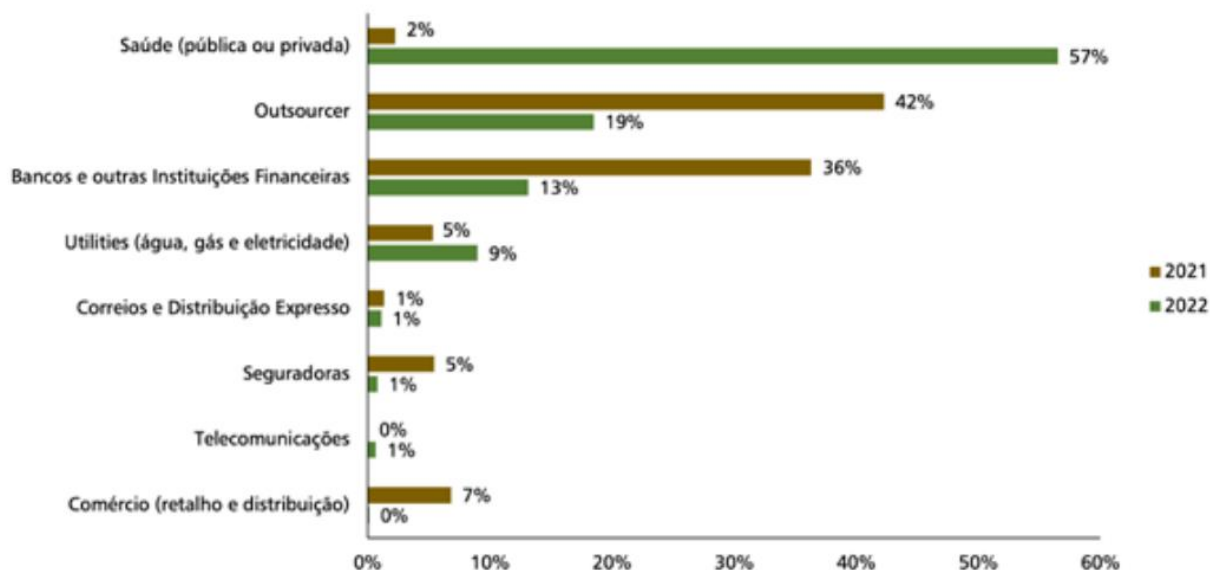
FIGURE 10 - PERCENTAGE OF ABANDONED INBOUND CONTACTS PER CHANNEL (N=831)



QUESTION: What is the average number of Inbound contacts served by IVR/Bot per day?

COMMENT: The majority of Inbound contacts attended by IVR/BOT per day occurred in the Health sector (public or private) with 57% of the total, followed by Outsourcers with 19%, Banks and other Financial Institutions with 13%.

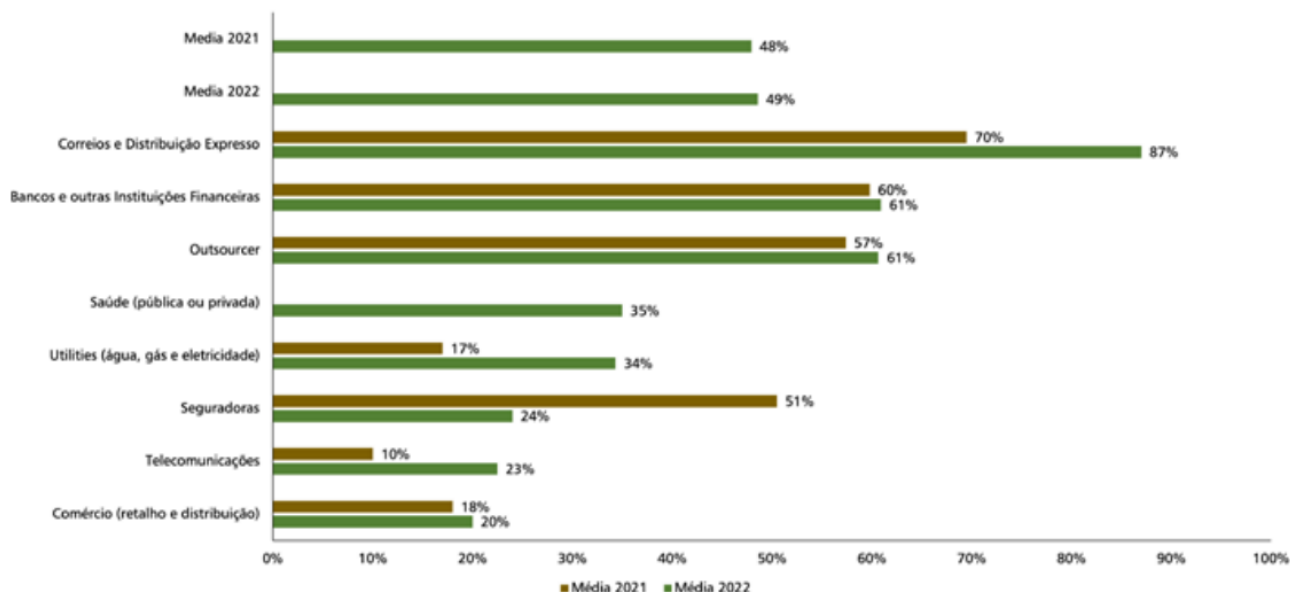
FIGURE 11 - AVERAGE NUMBER OF INBOUND CONTACTS ATTENDED BY IVR/BOT PER DAY (N=215)



QUESTION: Of the calls answered by IVR/Bot, what percentage is forwarded to the Operator/Contact Manager?

COMMENT: Of the calls answered by IVR/BOT about 49% are forwarded on average to an Operator/Contact Manager. The sectors that have a percentage of rerouting to the highest Operator are Mail and Express Distribution (87%) and Banks and other Financial Institutions (61%). The sectors with the lowest percentage of re-routing are Commerce (20%) and Telecommunications (23%).

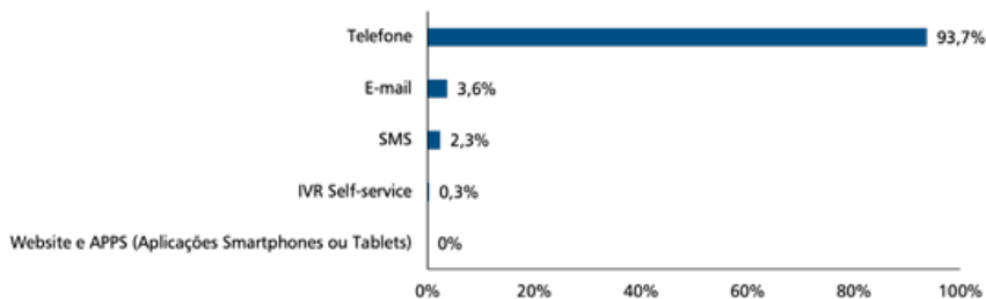
FIGURE 12 - PERCENTAGE OF CALLS ANSWERED BY IVR/BOT THAT ARE FORWARDED TO THE OPERATOR (N=228)



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

COMMENT: The average number of daily outbound contacts in 2022 increased by about 11% (from 339,871 to 378,791). The channel that has the highest percentage of Outbound contacts is Phone with 93%, followed by Email with 3.6%, SMS with 2.3% and IVR Self-service with 0.3%.

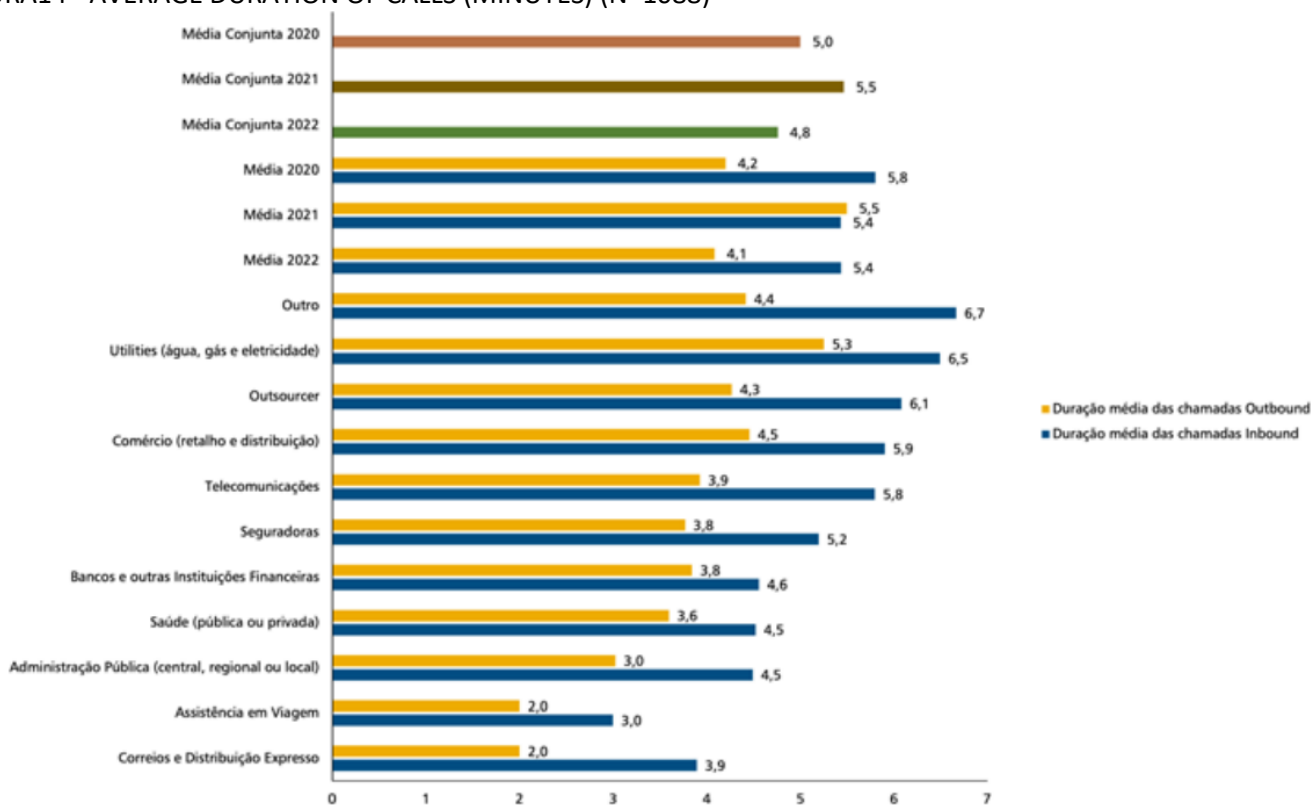
FIGURE 13 - DISTRIBUTION OF OUTBOUND CONTACTS (N=809)



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

COMMENT: The average duration of calls in 2022 shows a significant reduction, from 5.5 to 4.8 minutes, reversing the trend of previous years. This decrease was induced by the evolution of the duration of Outbound calls (from 5.5 to 4.1 minutes), keeping the duration of Inbound calls stable (5.4 minutes). The sectors with the highest inbound call times were Utilities (6.5 minutes), Outsourcers (6.1 minutes), Commerce (5.9 minutes) and Telecommunications (5.8 minutes). The shortest Inbound call times belong to Mail and Express Distribution (3.9 minutes) and Travel Assistance (3.0 minutes) sectors. Regarding the outbound calls, the sectors that have a higher average duration are Utilities (5.3 minutes), Commerce (4.5 minutes) and Outsourcers (4.3 minutes). For Outbound calls, the sectors with the lowest values are Mail and Express Distribution (2.0 minutes), and Travel Assistance (2.0 minutes).

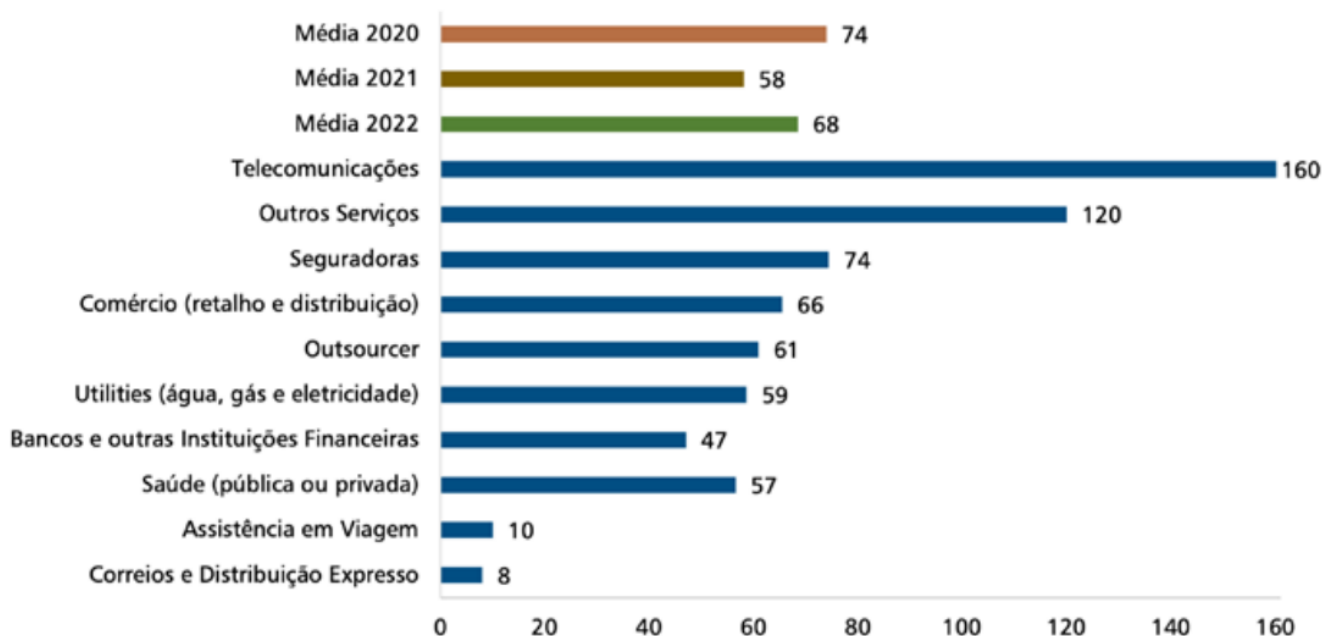
FIGURA14 - AVERAGE DURATION OF CALLS (MINUTES) (N=1088)



QUESTION: What is the average pause time (on hold)?

COMMENT: Contrary to the downward trend seen in 2021, in the year 2022 the average hold time increased by about 10 seconds (from 58 to 68 seconds). The sectors that recorded the highest times were Telecommunications (160 seconds) and Insurance (74 seconds). The sectors of Travel Assistance (10 Seconds) and Mail and Express Distribution (8 Seconds) have the lowest average hold time.

FIGURE 15 - AVERAGE ON HOLD TIME (SECONDS) (N=867)



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

COMMENT: Maintaining the strong trend of previous years, the average wait time to be served by the Contact Center decreased to 50 seconds (it was 64 seconds in 2021). The sectors with the highest waiting times were Mail and Express Distribution sectors (240 seconds) and Utilities (84 seconds). The sectors with the shortest waiting time were Travel Assistance (20 seconds) and Outsourcers (33 seconds).

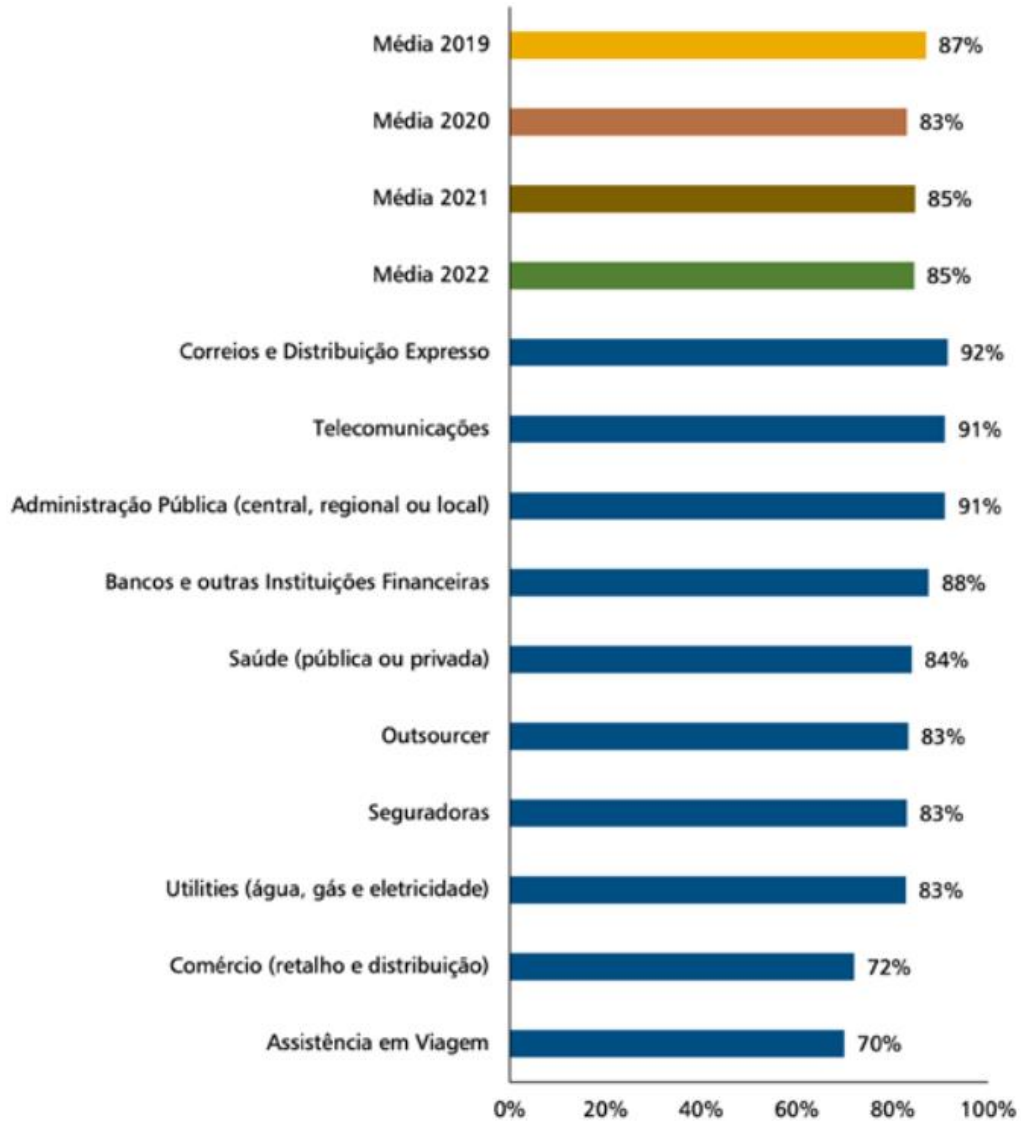
FIGURE 16 - AVERAGE WAITING TIME TO BE SERVED BY THE CONTACT CENTER (SECONDS) (N=699)



QUESTION: What is the resolution rate at first contact?

COMMENT: The average resolution rate at first contact remained stable at 85%. In 2022, the sectors with the highest rates were Mail and Express Distribution (92%), Telecommunications and Public Administration (both with 91%). The sectors with the lowest percentage were Travel Assistance (70%) and Retail and Distribution (72%)."

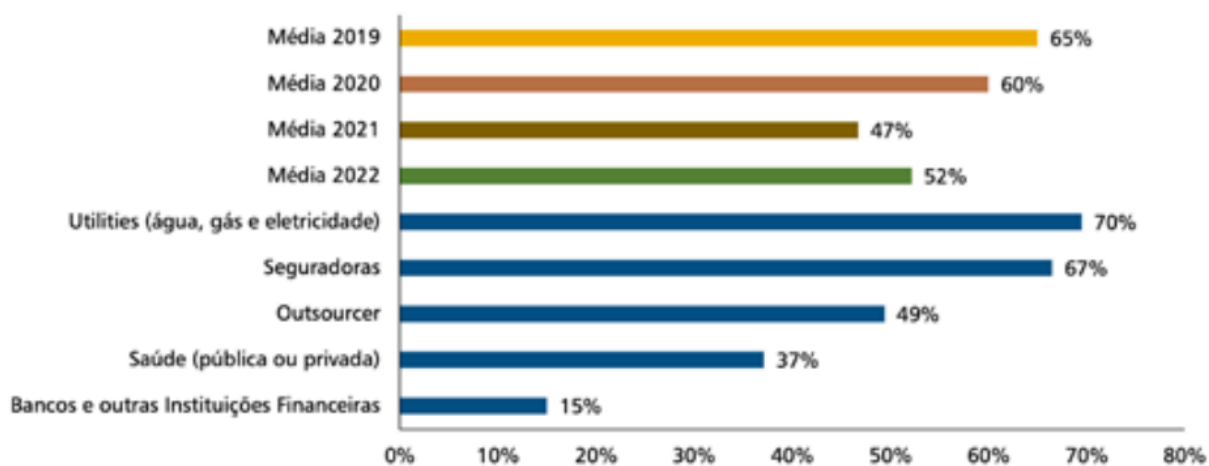
FIGURE 17 - FIRST CONTACT RESOLUTION RATE (N=582)



QUESTION: What is the success percentage of retention inbound calls?

COMMENT: The success of inbound retention calls had been recording successively lower results, having now reversed the trend, increasing from 47% to 52% in 2022. The best performance occurred in the Utilities sector: 70%.

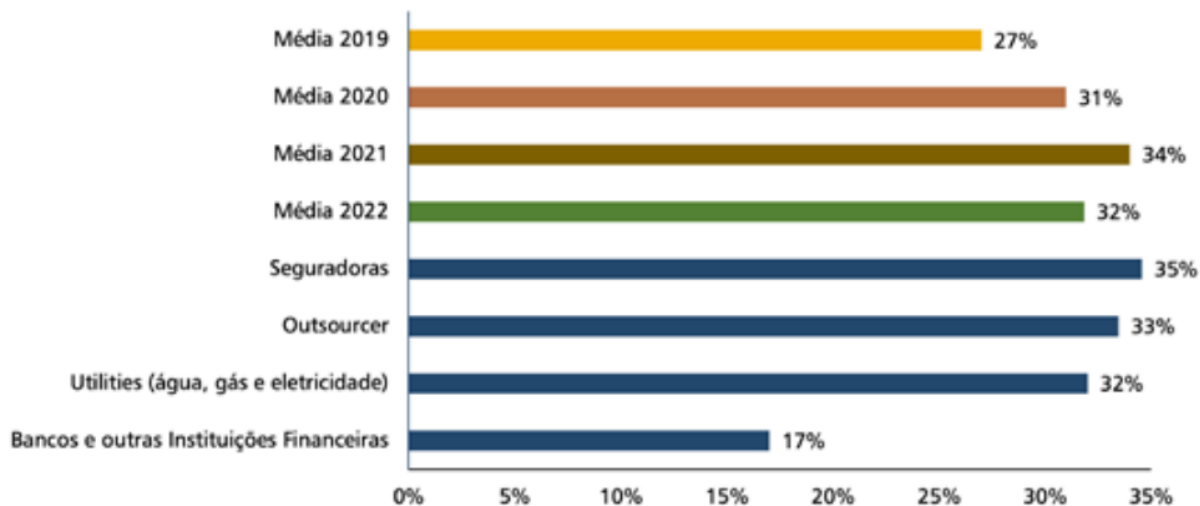
FIGURE 18 - PERCENTAGE OF SUCCESS OF RETENTION INBOUND CALLS (N=124)



QUESTION: What is the success percentage of outbound retention calls?

COMMENT: In contrast to Inbound retention calls, the success of Outbound retention calls has dropped slightly to 32% after a string of improvement over the past three years. The Insurance sector had the highest success rate (35%) followed by Outsourcers at 33%.

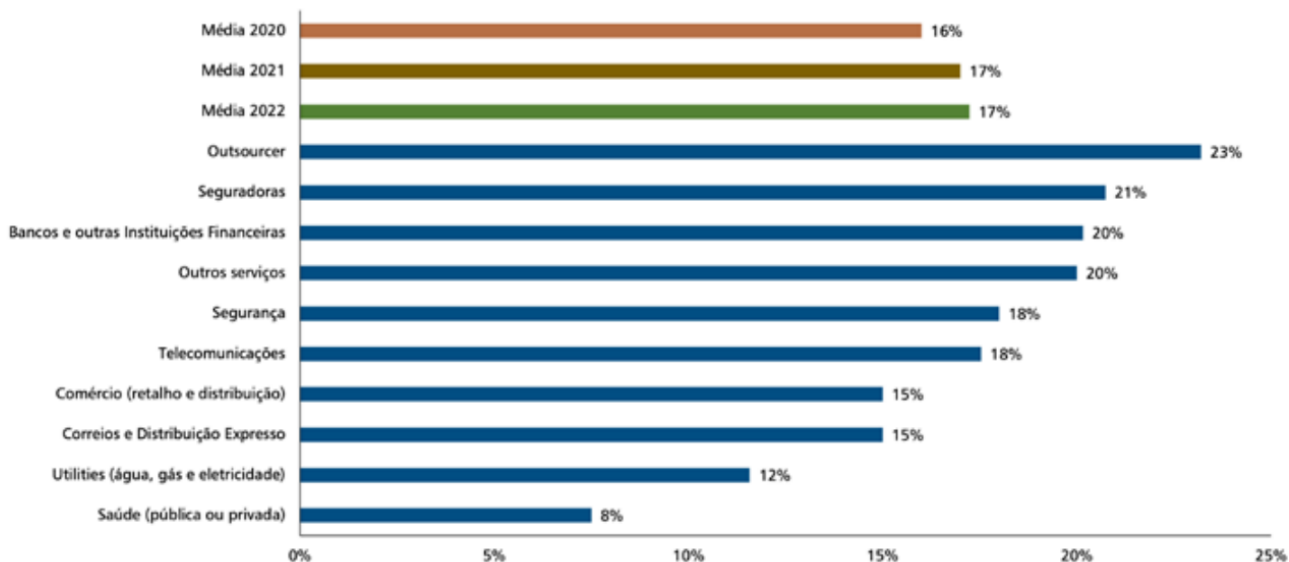
FIGURE 19 - PERCENTAGE OF SUCCESS OF OUTBOUND RETENTION CALLS (N=117)



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

COMMENT: In 2022 the values of the percentage of successful sales in Outbound Calls by sector remained at 17%. Regarding the sectors with the highest percentages, Outsourcers (23%) and Insurance (21%) stand out. The sector with the lowest percentage is Health (8%).

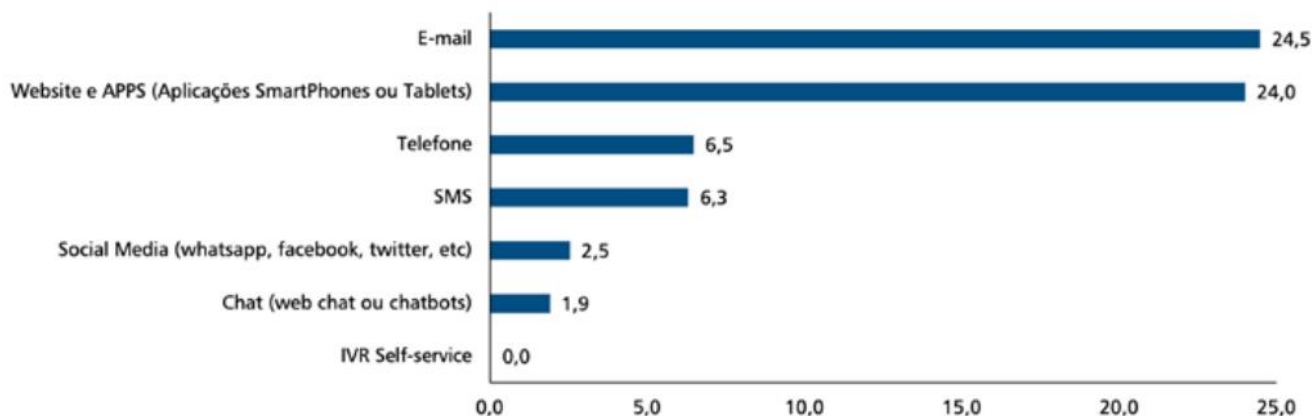
FIGURE 20 - PERCENTAGE OF SUCCESSFUL SALES IN OUTBOUND CALLS (N=306)



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

COMMENT: The 2022 data reveals that the Email (24.5 hours) and Website and APPS (24.0 hours) channels have the highest average request resolution time. The channels with the lowest average resolution time are Chat channels (1.9 hours) and IVR (0.0 hours).

FIGURE 21 - AVERAGE REQUEST RESOLUTION TIME (IN HOURS), EXCLUDING COMPLAINTS, PER CHANNEL (N=881)



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

COMMENT: Following the trend seen in 2021, the average request resolution time decreased significantly, from 8.6 hours to 3.9 hours. The sectors with the shortest time to resolve requests were Outsourcers (0.02 hours) and Health (0.1 hours). On the other hand, the sectors that registered the worst performance in this metric were the Utilities sectors (12.0 hours) and the Banks and other Financial Institutions (8.9 hours).

FIGURE 22 - AVERAGE REQUEST RESOLUTION TIME (IN HOURS), EXCLUDING COMPLAINTS, BY INDUSTRY (N=474)

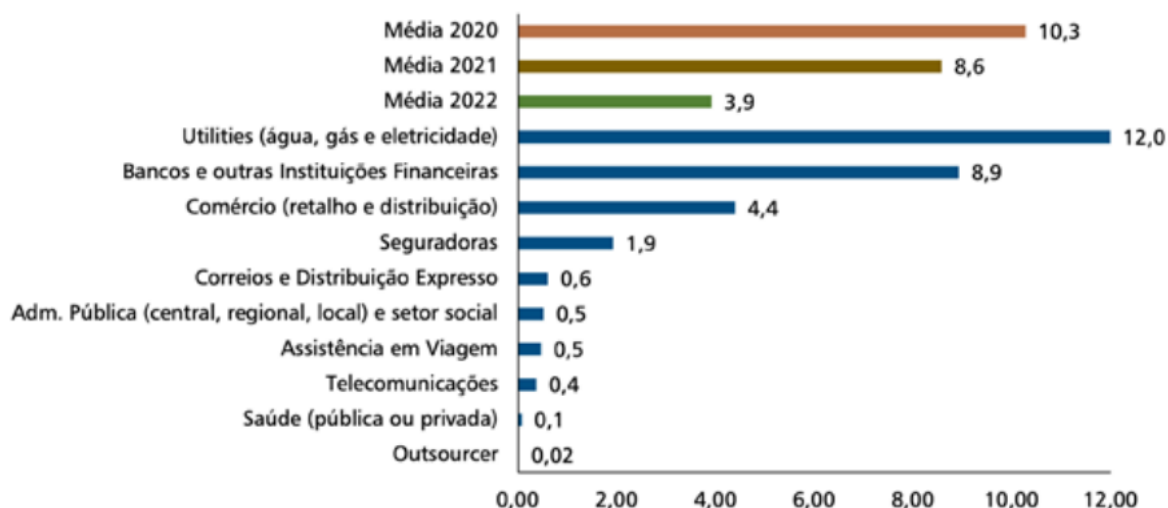
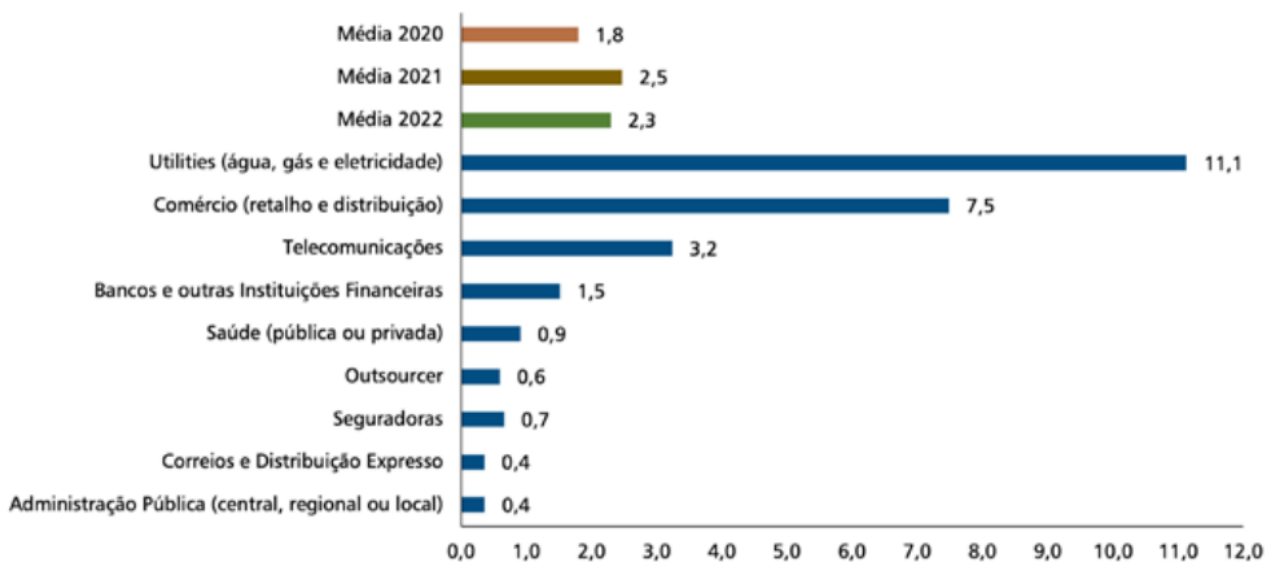


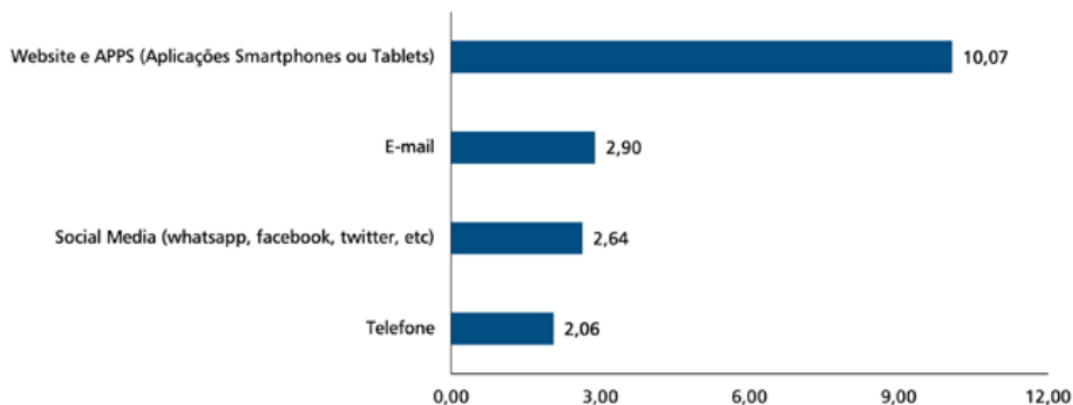
FIGURE 23 - AVERAGE TIME TO RESOLVE COMPLAINTS, BY SECTOR (DAYS) (N=456)



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

COMMENT: In relation to 2021, the Average Time of Resolution of Complaints evolved positively, having gone from 2.5 days to 2.3 days, partially correcting the worsening of the previous year. By sector, the worst performances occurred in Utilities (11.1 days) and Commerce (7.5 days). The best performances were verified in the Public Administration and in the Mail and Express Distribution (0.4 days in both cases) Regarding the channels, Website Media (10.7 days) and E-mail (2.90 days) were the ones that had the worst performance. Regarding the channels, the Phone (2.06 days) was the channel with the best performance.

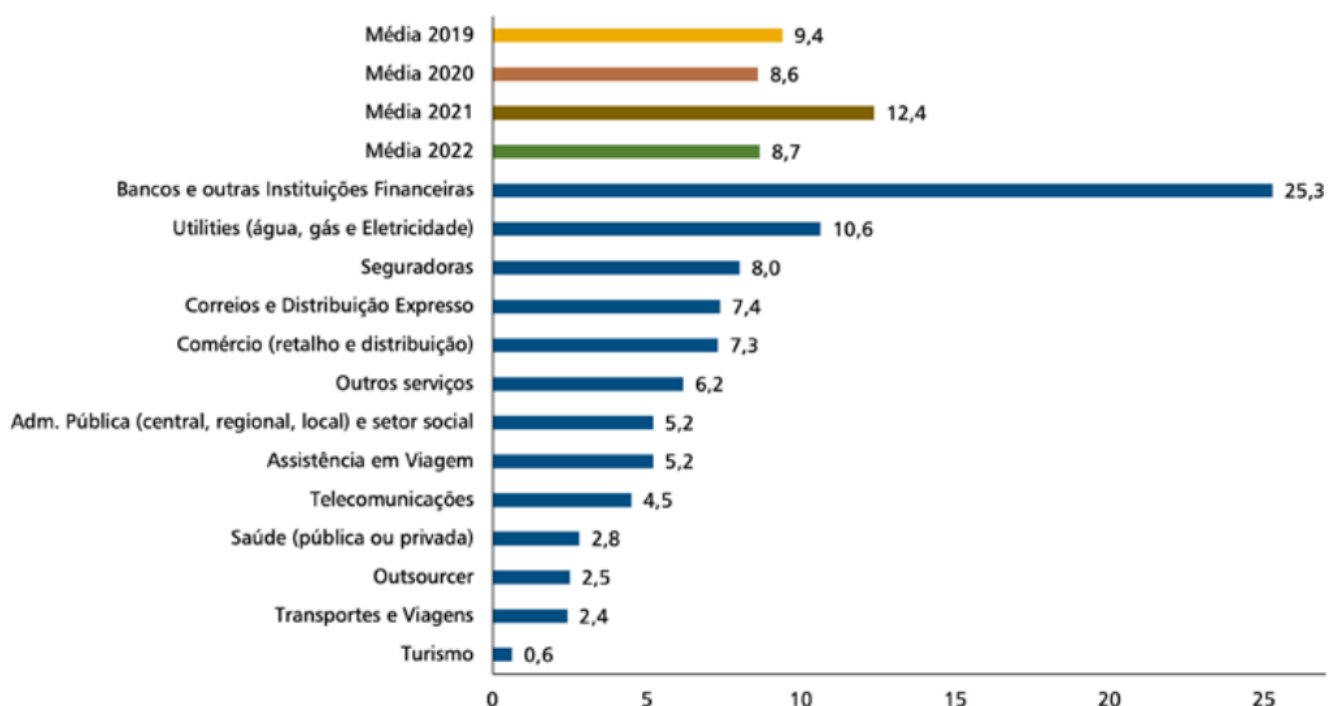
FIGURE 24 - AVERAGE COMPLAINT RESOLUTION TIME, PER CHANNEL (DAYS) (N=456)



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

COMMENT: On average, each Operator responds to 8.7 written requests per hour, contrary to the great improvement that was recorded in 2021 (12.4 requests). The sector of Banks and other Financial Institutions, stands out from the others registering an average number of written requests answered of 25.3 per Operator per hour, followed by the Utilities sector that registered an average of 10.6 requests. The sectors that respond to the lowest number of requests on average are Tourism (0.6 requests) and Transport and Travel (2.4 requests).

FIGURE 25 - AVERAGE NUMBER OF WRITTEN REQUESTS ANSWERED PER OPERATOR PER HOUR, PER SECTOR OF ACTIVITY (N=675)

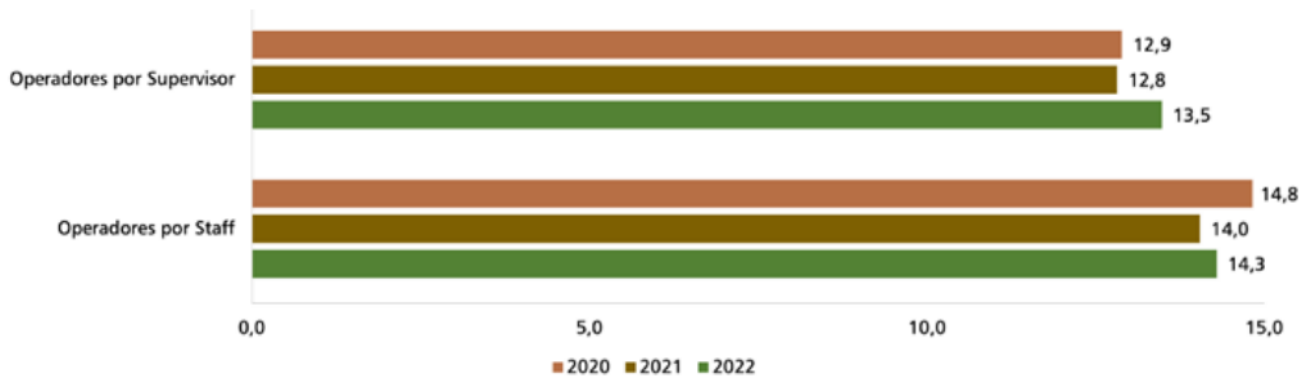


3 - Human Resources

QUESTION: What are the total Human Resources allocated to Contact Center operations? Indicate the number of Operators, the node of Supervisors and the total number of the support staff.

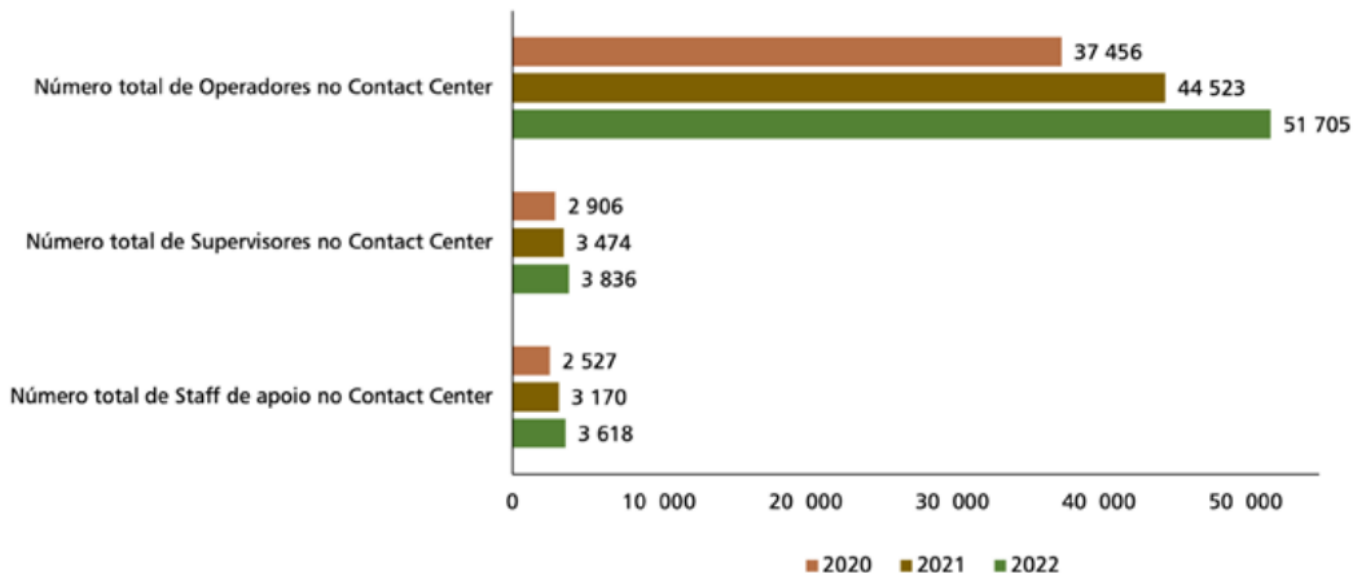
COMMENT: The ratios of Operators per Supervisor and per Staff increased slightly, but remained close to 13 in the first case and 14 in the second.

FIGURE 26 - HUMAN RESOURCES RATIO OF THE OPERATIONS UNDER STUDY (N=1181)



COMMENT: The number of Human Resources allocated to Contact Center operations included in this Study reached 59,159, representing an increase of 15.6% over the number achieved in 2021 (51,167). This increase is transversal to both Operators, Supervisors and Support Staff. It is worth mentioning the great representativeness of this sample, more than 50% of the known universe of Employees in the sector.

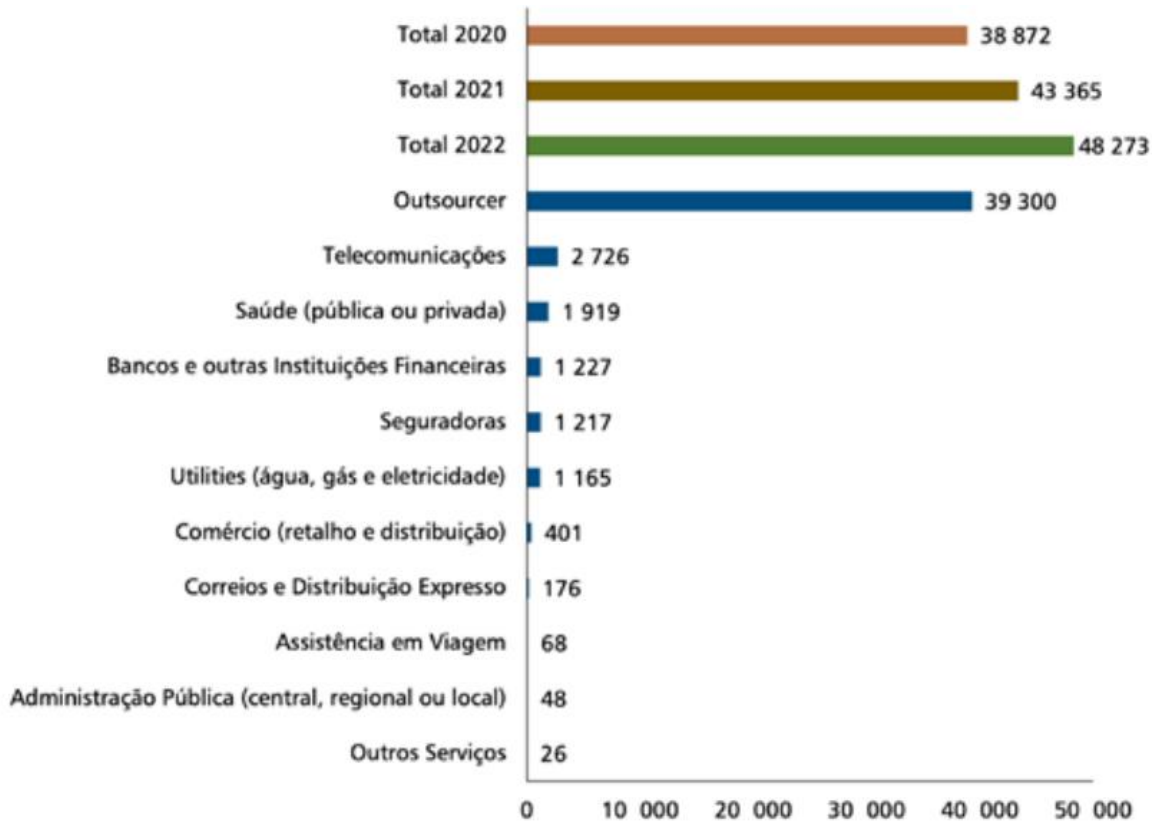
FIGURE 27 - TOTAL HUMAN RESOURCES OF THE OPERATIONS UNDER STUDY (N=1175)



QUESTION: In 2022, what is the average number of full-time Contact Center Employees (FTE) allocated to Inbound and Outbound?

COMMENT: The total number of FTEs increased compared to 2021 (43,365 in 2021 to 48,273 in 2022). Outsourcers represent more than 80% of this universe.

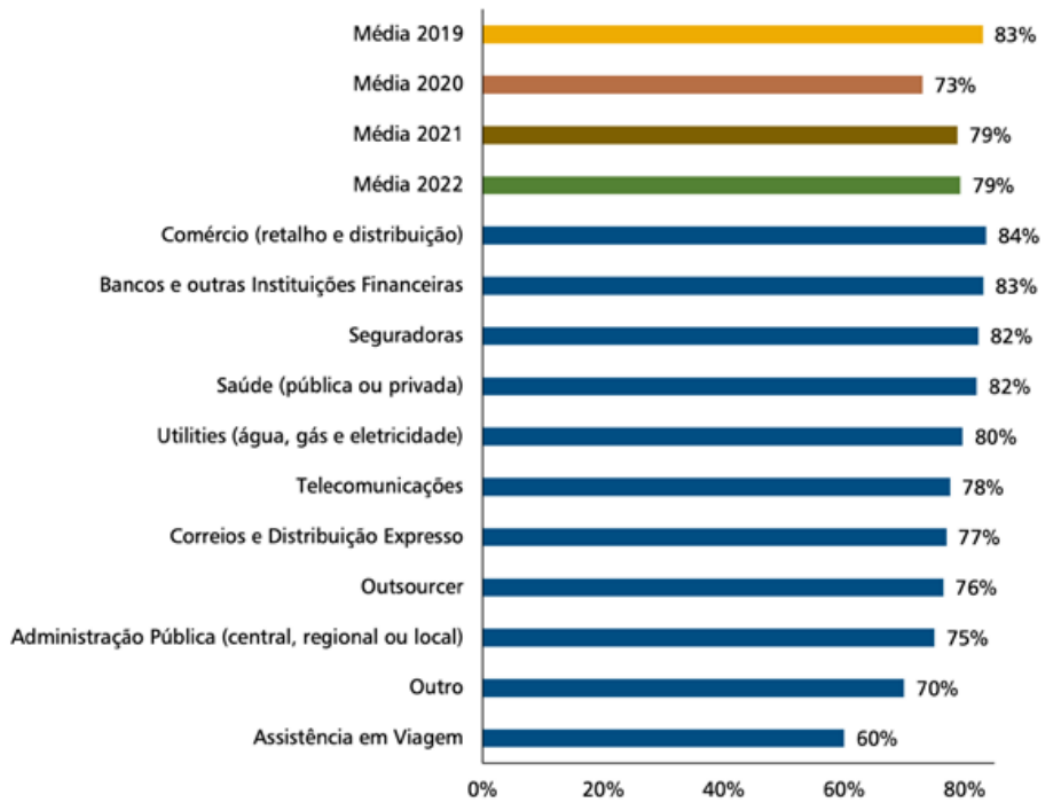
FIGURE 28 - AVERAGE NUMBER OF FULL-TIME CONTACT CENTER (FTE) EMPLOYEES ALLOCATED TO INBOUND AND OUTBOUND (N=1121)



"QUESTION: What is the average occupancy rate of resources in 2022?"

COMMENT: The average resource occupancy rate has stabilized at 79%, following a 2020 with strong pandemic impact and lower occupancy rates. Commerce (84%), Banks and other Financial Institutions (83%), Insurance (82%) and Health (82%) have above-average rates. Travel Assistance (60%) had the lowest resource occupancy rate.

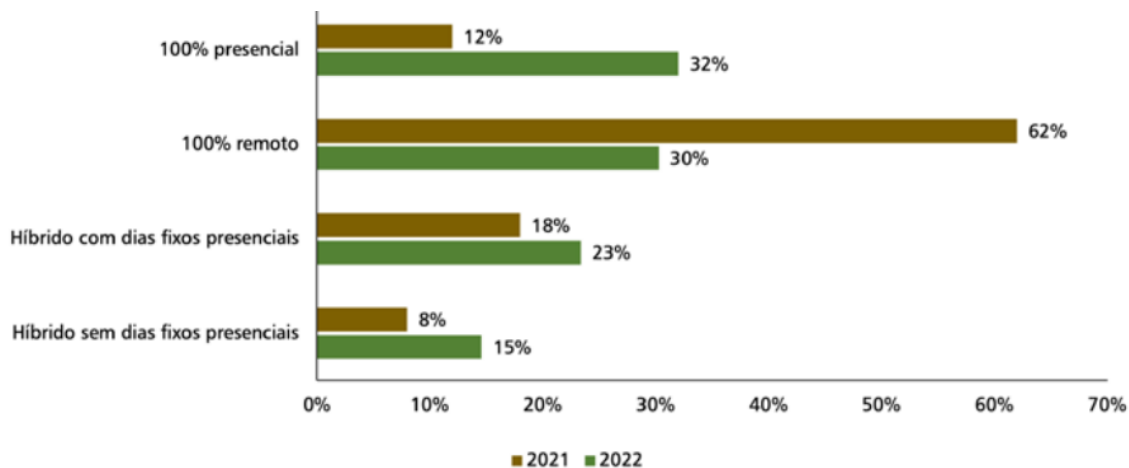
FIGURE 29 - AVERAGE RESOURCE OCCUPANCY RATE (N= 879)



QUESTION: In 2022 what was the % of your Organization's Contact Center Employees working in the following regimes?

COMMENTS: Regarding the different work regimes, there is a very significant decrease in Employees working in a 100% remote regime (from 62% in 2021 to 30% in 2022), and an increase in the 100% face-to-face regime (from 12% in 2021 to 32% in 2022). The remaining 38% work in a hybrid regime, 23% with fixed days in person and 15% without fixed days in person.

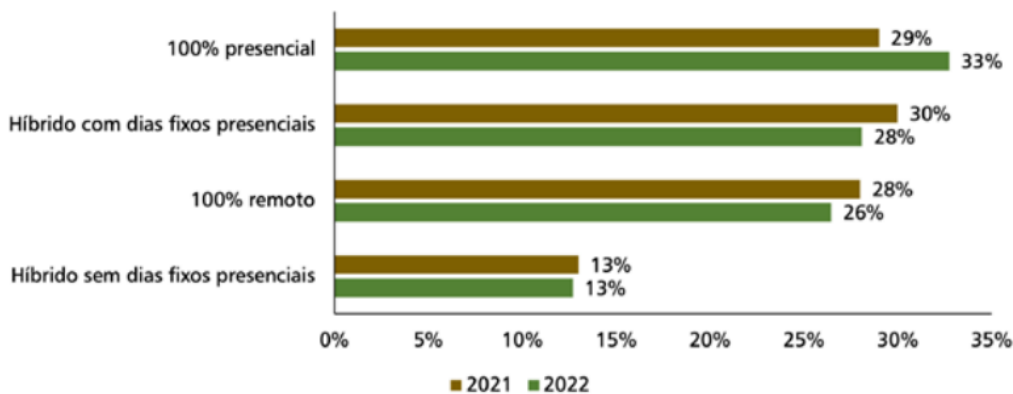
FIGURE 30 - PERCENTAGE OF EMPLOYEES BY WORK REGIME (CURRENT) (N=1093)



QUESTION: In the future, what do you think will be the % of Contact Center Employees in your Organization working in the following regimes?

COMMENT: When asked about the evolution of the future work regime, the majority answered that it will be hybrid (41%), with greater weight of the option with fixed face-to-face days (28%) than without fixed face-to-face days (13%). The forecast of the future use of the 100% face-to-face regime grows only from 32% to 33%. There is some stability in the forecasts, made in 2022, compared to those made in 2021. It should be noted that the forecasts made in 2021 corresponded almost exactly to the evolution that occurred in 2022.

FIGURE 31 - PERCENTAGE OF EMPLOYEES BY WORKING REGIME (FUTURE) (N=1062)



QUESTION: What is the distribution of Employees by level of education?

COMMENT: This year's sample shows an increase in the percentage of Employees with University degree (45%), for the first time above 40% (39% in 2020, 36% in 2021). Conversely, Employees with complete Secondary Education go from almost 60% in the previous two years (57% in 2020, 59% in 2021) and are 50% now. Employees with less than the complete Secondary remain in almost residual values (5%).

The sector in which there is a higher percentage of Employees with higher education is the Public Administration (47%), where we also find the highest percentage of Employees without complete secondary education. Mail and Express Distribution (37%), Banks and Financial Institutions (34%) and Outsourcers (34%) are the sectors that follow with the greatest relative weight of complete Higher Education. The frequency of Higher Education is particularly relevant in Commerce (43%).

FIGURE 33 - DISTRIBUTION OF EMPLOYEES BY LEVEL OF EDUCATION (N=1083)

DISTRIBUIÇÃO DOS COLABORADORES POR GRAU DE ENSINO (N=1083)

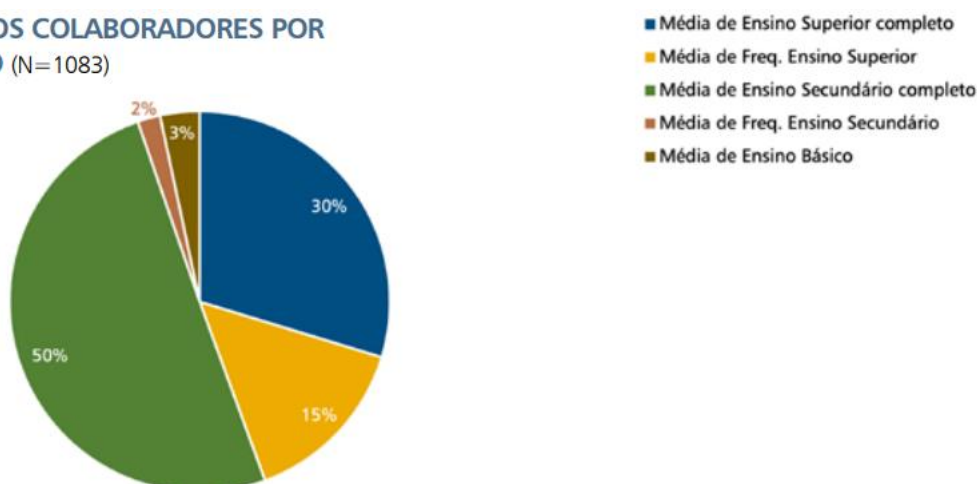
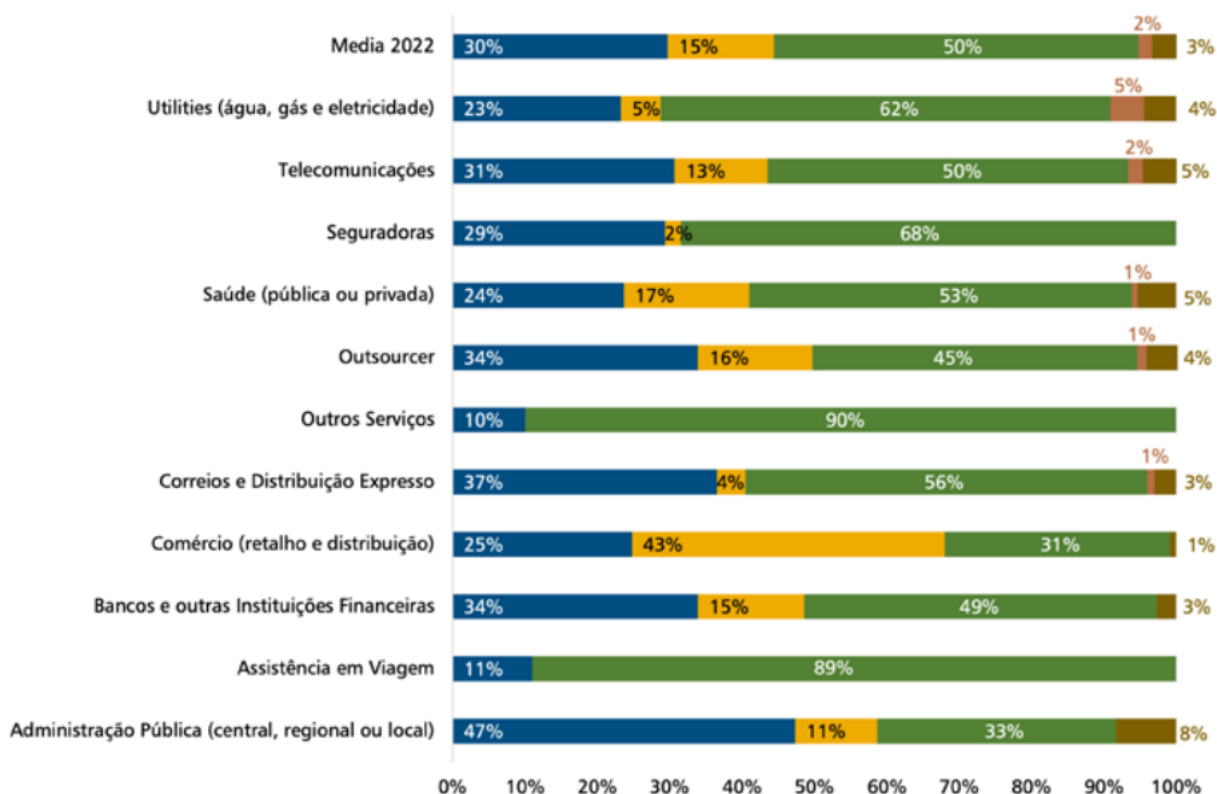


FIGURE 32 - DISTRIBUTION OF EMPLOYEES BY LEVEL OF EDUCATION, BY SECTOR (N=1083)



"QUESTION: Are employee satisfaction surveys conducted? What is the frequency of employee satisfaction surveys? What rating did you get on a scale of 0% to 100% in the last year?"

COMMENT: 90% of respondents indicate conducting satisfaction surveys to their employees, which represents an increase from the 83% recorded in 2021. The most frequent periodicities of the surveys are annual (58%), quarterly (18%) or semi-annual (18%). With regard to the average rating obtained, there is a stabilization, always above 80%, with a slight decrease this year. The sectors that recorded the most positive evaluations were Mail and Express Distribution (92%) and Commerce (88%). The Health sector (76%) showed a considerable decline (84% in 2021) and has one of the lowest results.

FIGURE 36 - CLASSIFICATION OBTAINED IN EMPLOYEE SATISFACTION SURVEYS (N=1057)

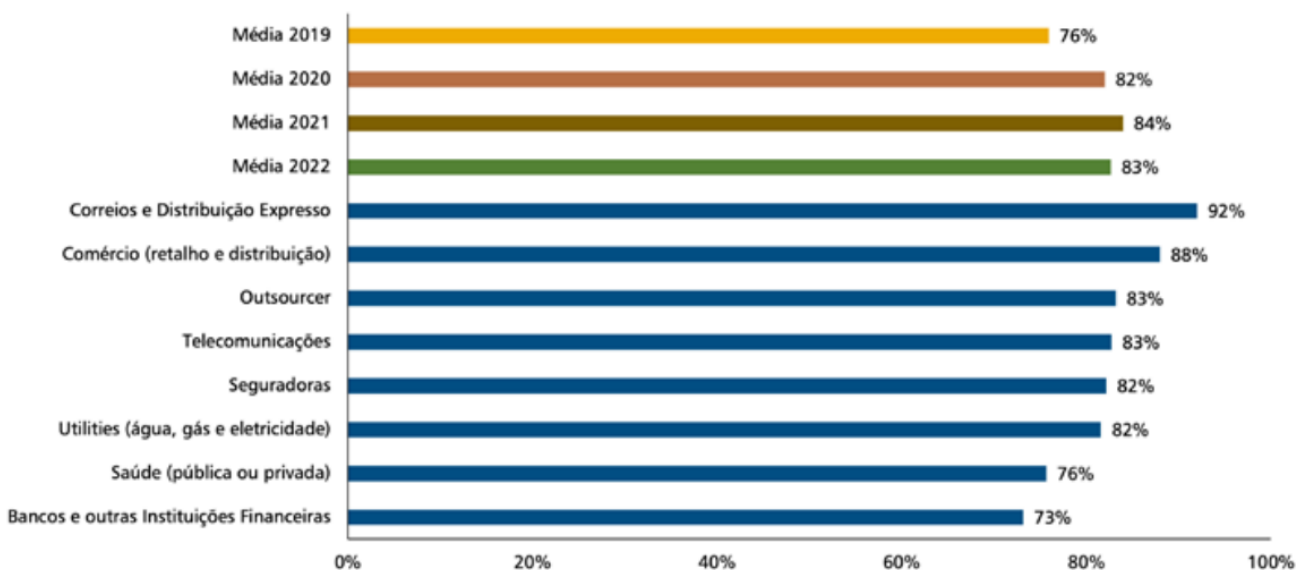


FIGURE 34 - CONDUCTING EMPLOYEE SATISFACTION SURVEYS (N=1057)

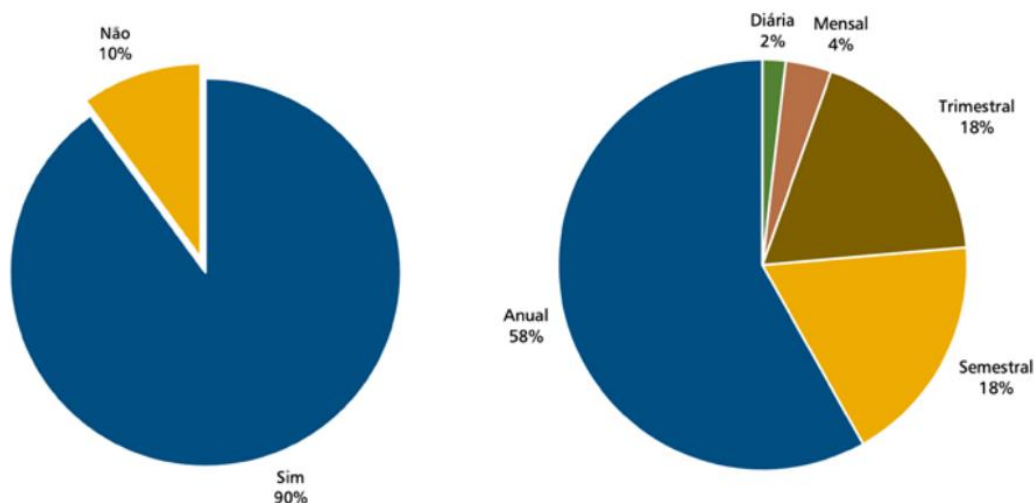
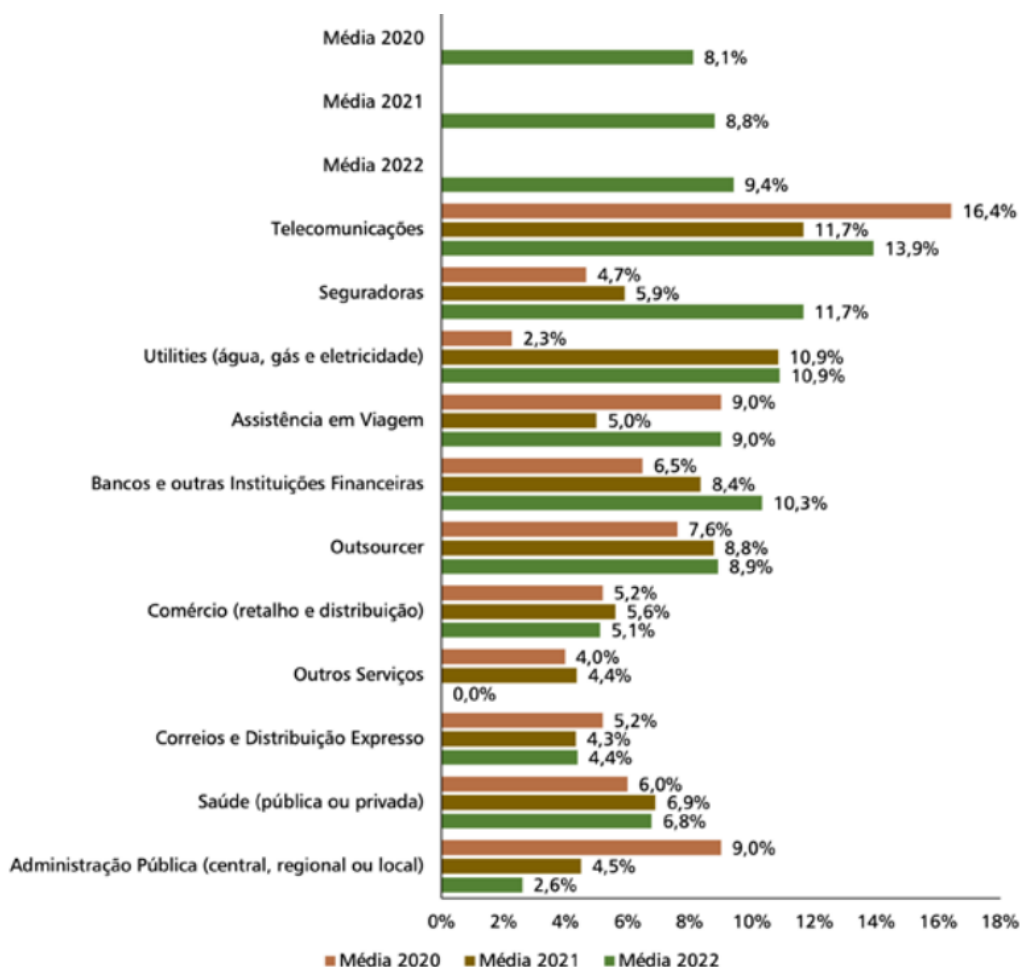


FIGURE 35 - PERIODICITY OF SURVEYS (N=1057)

QUESTION: What is the average absenteeism rate of Operators in 2022?

COMMENT: The absenteeism rate, which dropped considerably at the beginning of the pandemic, continues to grow gradually and approach 2019 values. The sector of activity that presented the highest rate of absenteeism was Telecommunications (13.9%), as has been the habit over the years. Compared to 2021, Insurance and Banks and other Financial Institutions showed the largest increase and Public Administration the largest reduction.

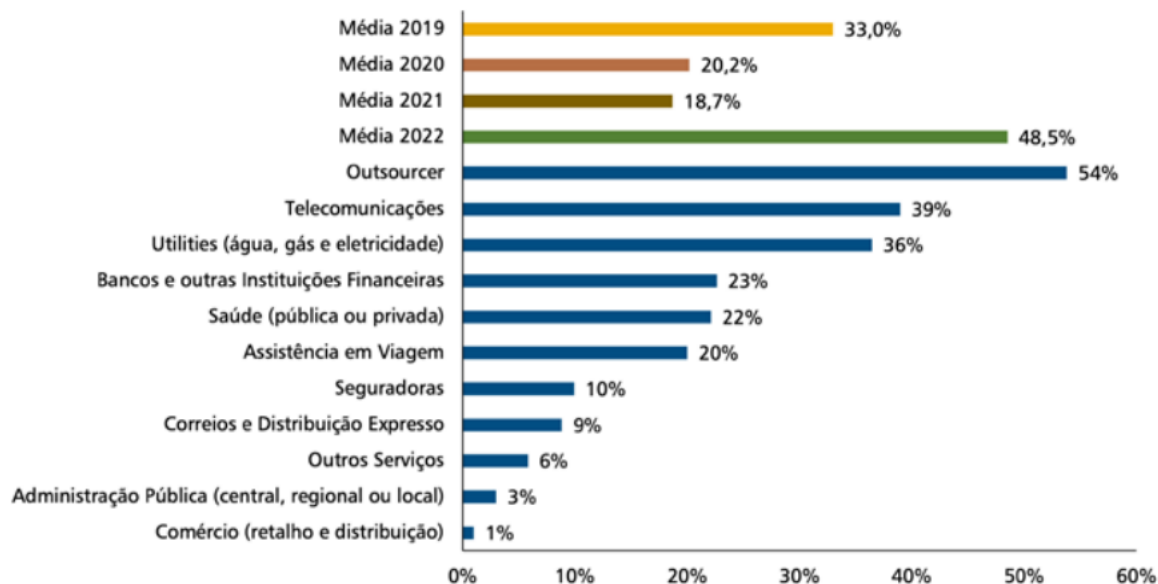
FIGURE 37 - AVERAGE ABSENTEEISM RATE OF OPERATORS (N=1031)



QUESTION: What is the rotation rate of Operators in 2022?

COMMENT: The average rotation rate of Operators, after a reduction during the Pandemic, is now much higher than in recent years. In 2021 it was below 20%. It is now almost in the 50% (48.2%). In Outsourcers this rate is even 54%. It is above 30% in Telecommunications and Utilities and above 20% in Banks and other Financial Institutions and Health. Values below 10% in all other sectors.

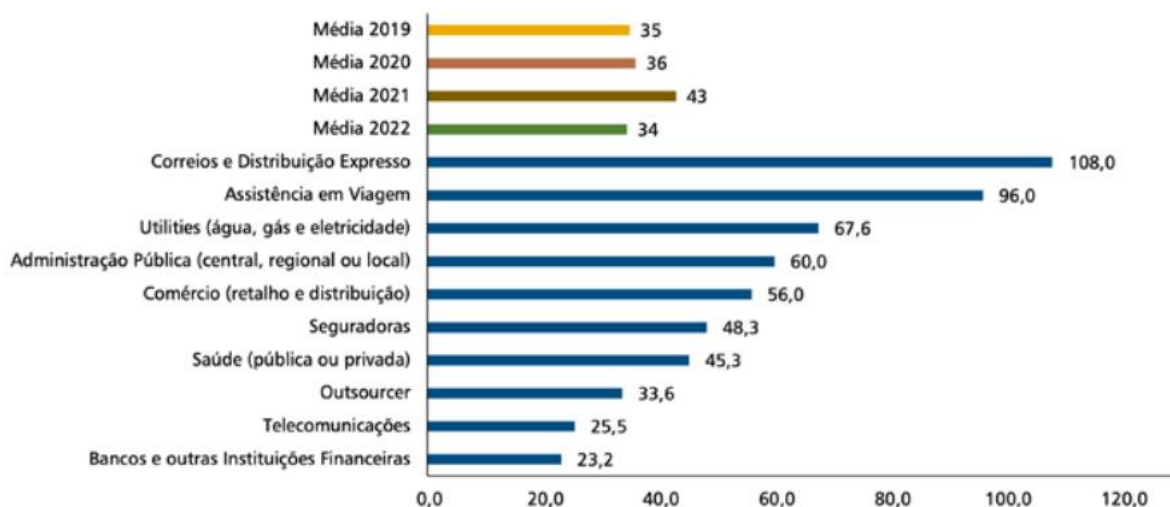
FIGURE 38 - OPERATOR ROTATION RATE (N=989)



QUESTION: What is the average seniority of the Operators?

COMMENT: The remarkable increase in rotation has reduced the average age significantly (from 43 to 34 months), contrary to the growth of this indicator that was already observed three years ago. The Mail and Express Distribution sector maintains the highest rate, above 100 months, despite a significant reduction (it was 126 months in 2021), while that of Banks and other Financial Institutions maintains the lowest average seniority value (which has gone from 30 in 2021 to 23.2 months now).

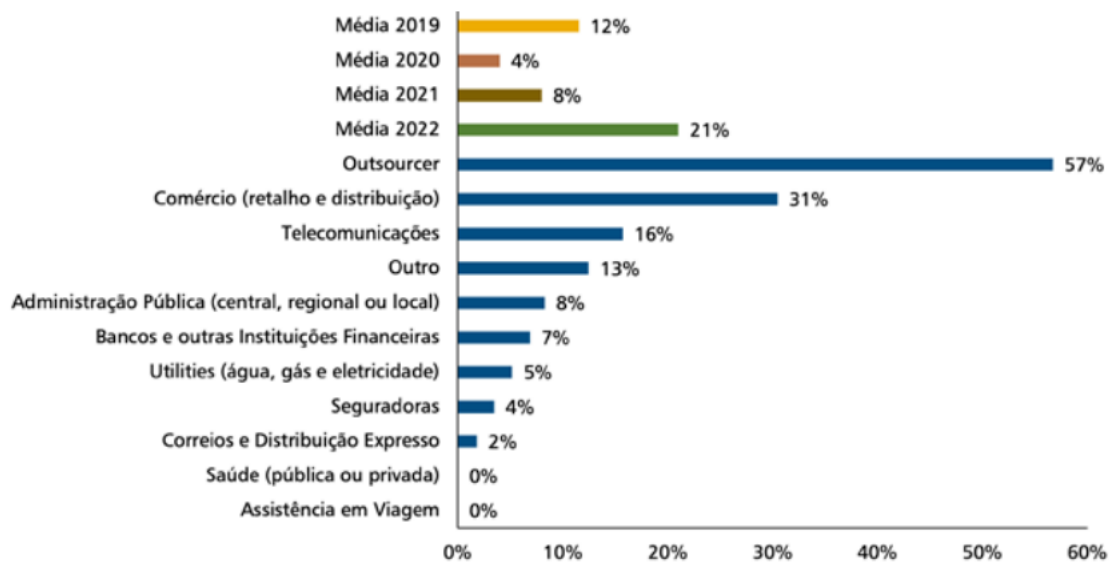
FIGURE 39 - AVERAGE SENIORITY OF OPERATORS (IN MONTHS) (N=975)



QUESTION: What is the rotation rate of Supervisors in 2022?

COMMENT: The rotation rate of Supervisors remains, less than half of the rotation of assistants, but has exceeded 20% (21%), which compares with 8% in 2021. Outsourcing (57%) and Commerce (31%) have above-average results. Health and Travel Assistance have zero rotation.

FIGURE 40 - SUPERVISOR ROTATION RATE (N=1056)



QUESTION: What is the average seniority of the Supervisors?

COMMENT: The average seniority of Supervisors does not yet reflect the increase in rotation, being at levels comparable to those of previous years (75 months). Seniority is clearly higher than the average in Mail and Express Distribution (204 months) and Travel Assistance (180 months). Insurers and Commerce have lower average seniors.

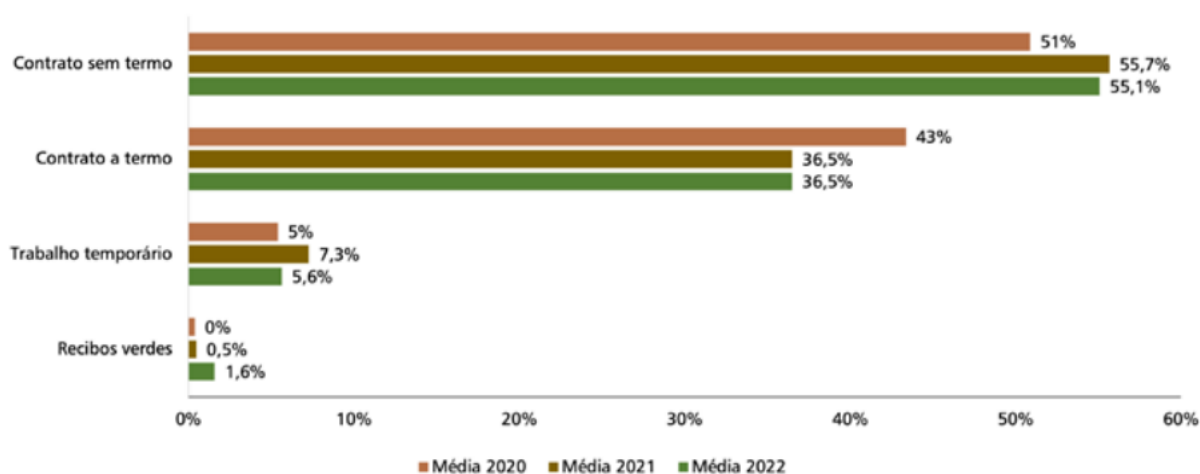
FIGURE 41 - AVERAGE SENIORITY OF SUPERVISORS (IN MONTHS) (N=870)



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

COMMENT: Directly contradicting the narrative of the precarious sector, the results of 2022 reveal a stabilization in the type of Employee contracts, above 55% with an effective contract. The use of temporary work is marginal, having fallen to 5.6% and the use of green receipts, is less than 2%.

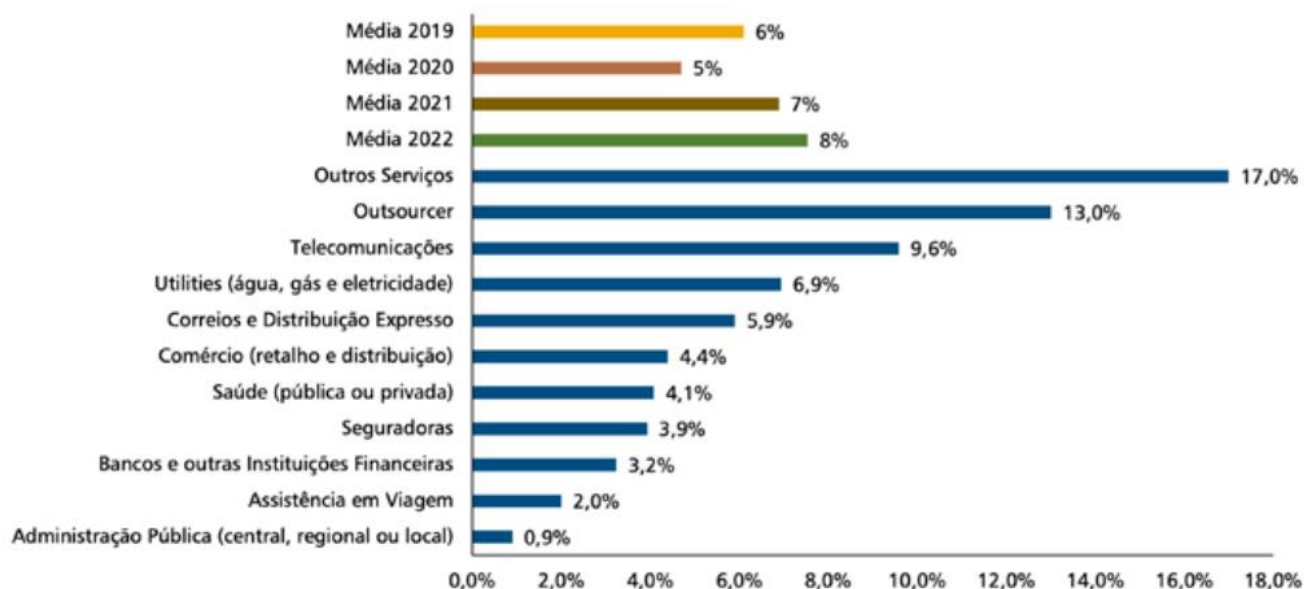
FIGURE 42 - DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY CONTRACTUAL RELATIONSHIP (N=1044)



"QUESTION: What percentage of Contact Center Employees relocated to other functions within the Organization?

COMMENT: This indicator has been registering a progressive increase, now standing at 8%. The highest value is found in Outsourcers (13%) and the lowest in Public Administration (0.9%).

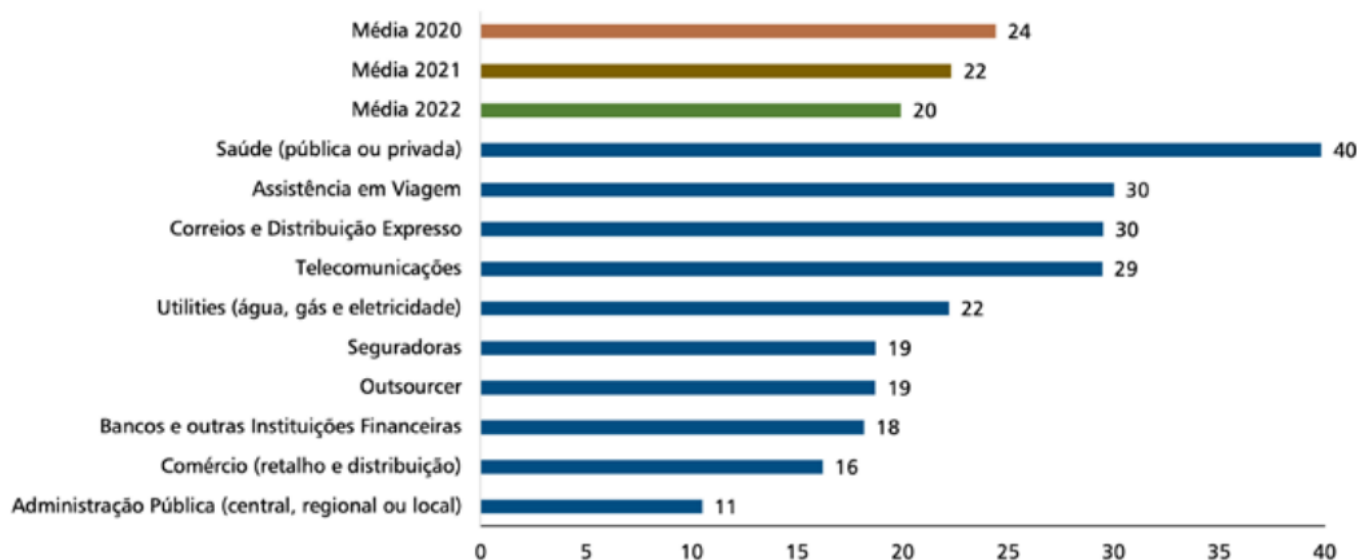
FIGURE 43 - CONTACT CENTER EMPLOYEES RELOCATED TO OTHER FUNCTIONS WITHIN THE ORGANIZATION (N=987)



QUESTION: What is the average time required to train an Employee who has just joined the Contact Center?

COMMENT: The average time of initial formation continues to decrease progressively, being now 20 days (it was 22 days in 2021 and 24 in 2020). The sector where the longest time of initial training was verified continues to be Health, with 40 days. The Public Administration has the lowest value (11 days).

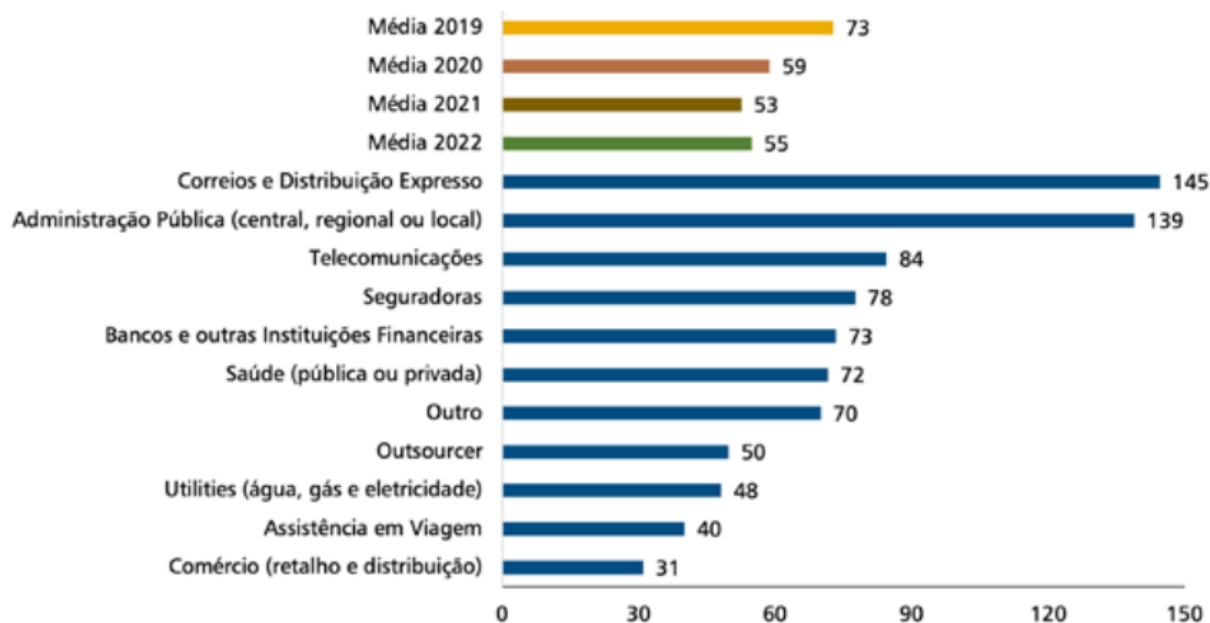
FIGURE 44 - AVERAGE TIME REQUIRED TO TRAIN AN EMPLOYEE WHO HAS JUST ENTERED THE CONTACT CENTER (IN DAYS) (N=1040)



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

COMMENT: The number of annual training hours per Operator has gone down during the COVID period and has now recovered again (55 hours). The sectors with the most hours of annual training were the Mail and Express Distribution (144.5 hours) and soon after the Public Administration (139 hours). Travel Assistance (40 hours) and Commerce (31 hours) are the sectors with the lowest average values.

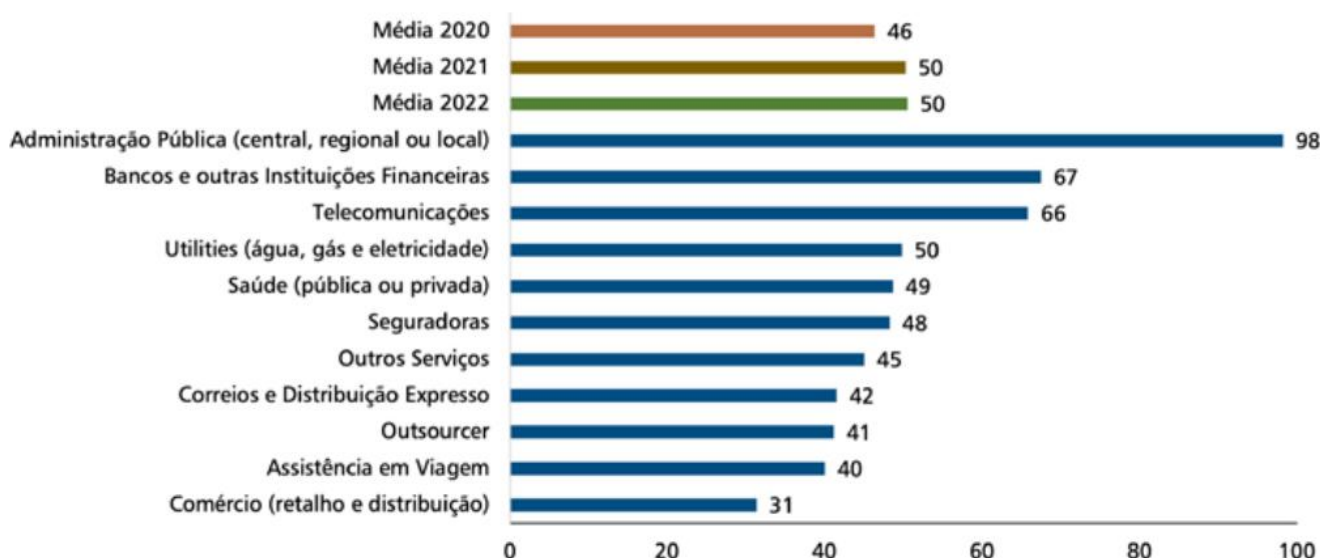
FIGURE 45 - NUMBER OF HOURS OF ANNUAL TRAINING (PER OPERATOR) (N=1031)



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

COMMENT: The number of hours of training of Supervisors has stabilized at 50. The sector with the most hours of annual training for Supervisors was Public Administration (98 hours), followed by Banks and other Financial Institutions (67 hours) and Telecommunications (66 hours). Commerce registers the lowest value (31 hours).

FIGURE 46 - NUMBER OF HOURS OF ANNUAL TRAINING (PER SUPERVISOR) (N=883)



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

COMMENT: Compared to 2021, there was a recovery in the percentage of specific training/certification programs for Supervisors, Trainers and Quality Experts (in 2022 the values were 72%, 69% and 65%, respectively).

FIGURE 47
2020 - TRAINING PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR SUPERVISORS (N=927)

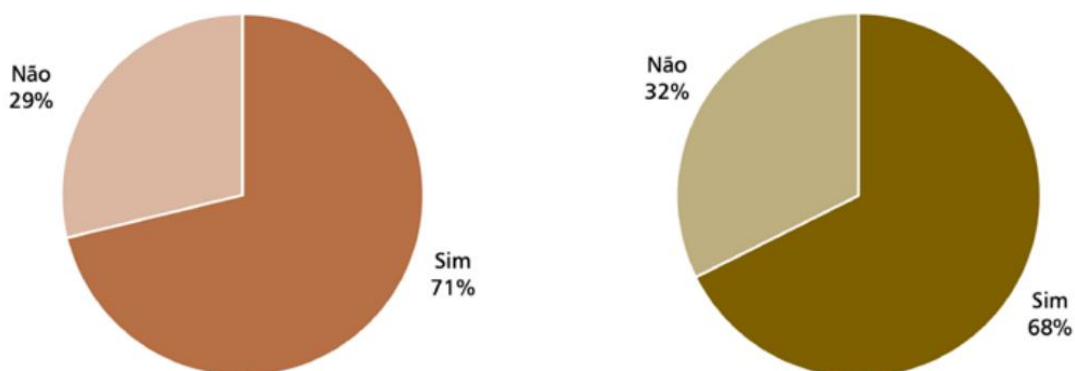


FIGURE 48
2021 - TRAINING PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR SUPERVISORS (N=883)

FIGURE 49
2022 - TRAINING PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR SUPERVISORS (N=1175)

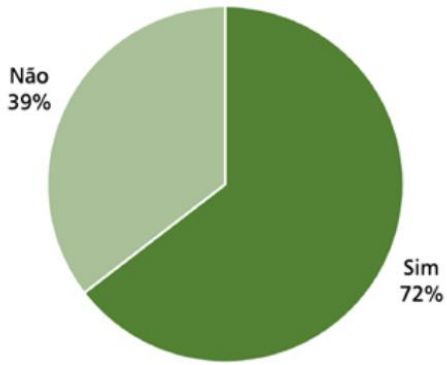


FIGURE 50
2020 - TRAINING PLAN/ PROGRAM/ SPECIFIC ACCREDITATION FOR TRAINERS (N=927)

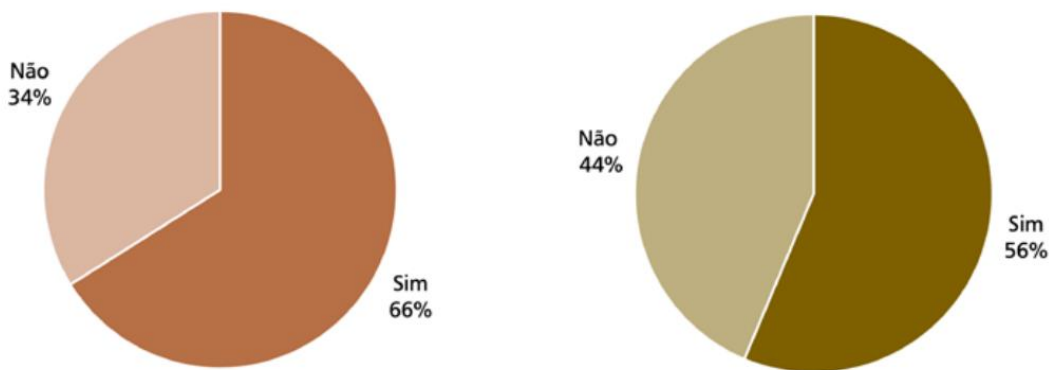


FIGURE 51
2021 - TRAINING PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR TRAINERS (N=883)

FIGURE 52
2022 - PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR TRAINERS (N=1175)

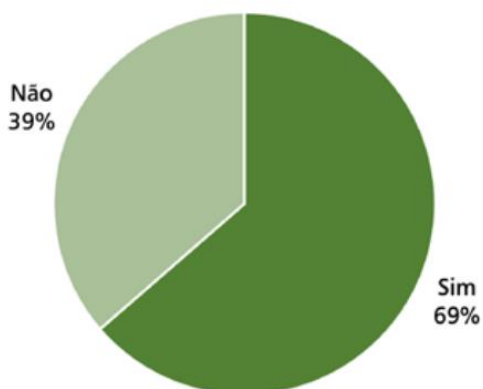


FIGURE 53
2020 - PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (N=925)

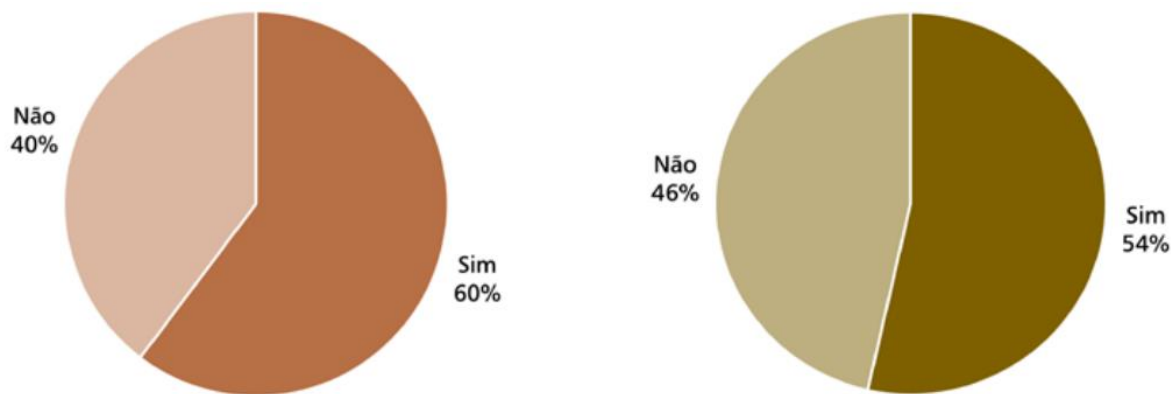
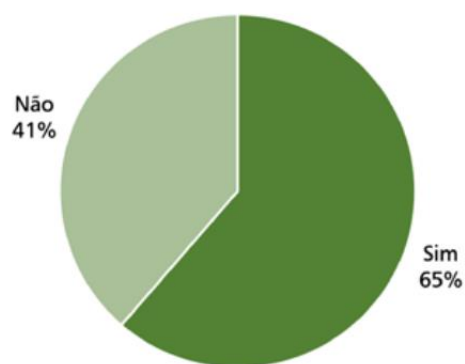


FIGURE 54
2021 - TRAINING PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (N=883)

FIGURE 55
2022 - PLAN/ TRAINING PROGRAM/ SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (N=1175)



QUESTION: What is the gender distribution of Supervisors and Operators?

COMMENT: The female gender continues to be predominant among Contact Center Employees. There is in 2022 an approximation to the values of 2020, after a slight reinforcement of the male gender in the year 2021. Among Operators, the female gender represents 63% (67% in 2020 and 61% in 2021) and among Supervisors it is 56% (equal value in 2020 and 59% in 2021).

FIGURE 56 - 2020 - GENDER DISTRIBUTION OF OPERATORS (N=927)

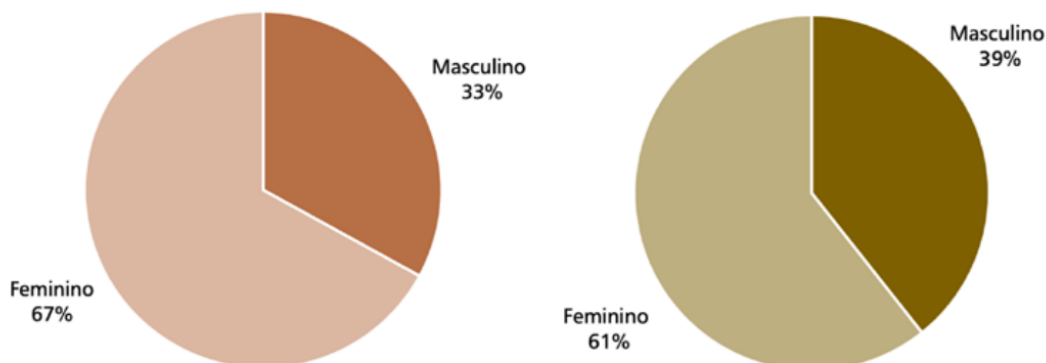


FIGURE 57 - 2021 - GENDER DISTRIBUTION OF OPERATORS (N=806)

FIGURE 58
2022 - GENDER DISTRIBUTION OF OPERATORS (N=1182)

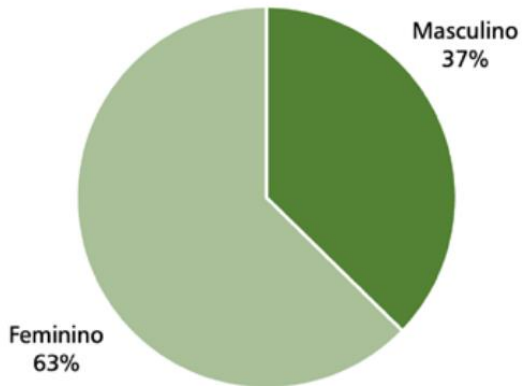


FIGURE 59 - 2020 - GENDER DISTRIBUTION OF SUPERVISORS (N=927)

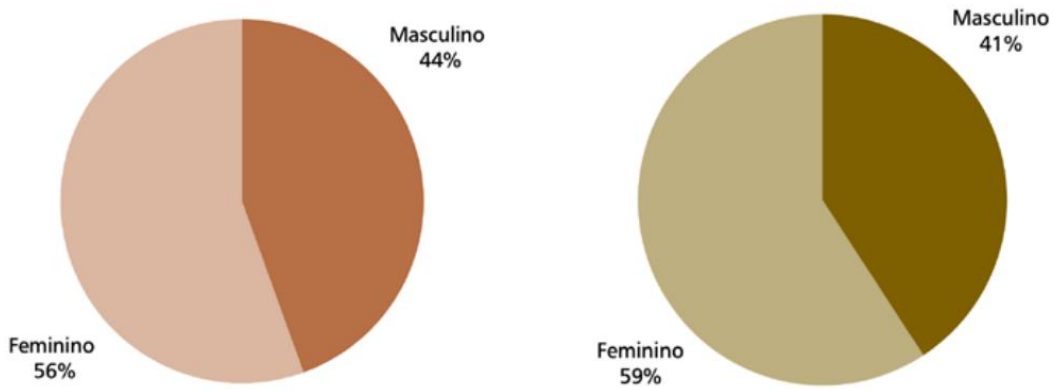
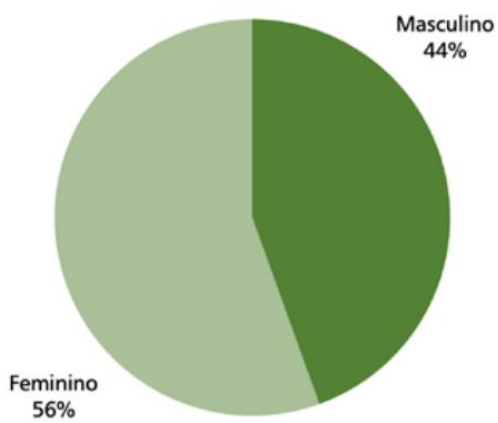


FIGURE 60 - 2021 - GENDER DISTRIBUTION OF SUPERVISORS (N=806)

FIGURE 61
2022 - GENDER DISTRIBUTION OF SUPERVISORS (N=1182)



QUESTION: Indicate the number of Operators and Supervisors aged between the following ranges?

COMMENT: The average age of operators and supervisors increased in the companies that responded to the questionnaire. Employees under 25 years of age decrease and Employees over 40 years of age increase. The 25-40 age group remains the most representative, between 50% and 60% for both roles in 2021 and 2022. Supervisors are on average significantly older than Operators (the percentages in the over-40 bracket are 35% and 27%, respectively).

FIGURE 62 - 2022 - AGE OF OPERATORS (N=1030)

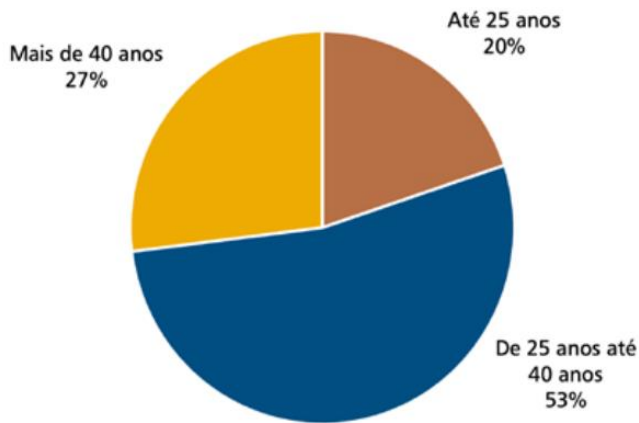
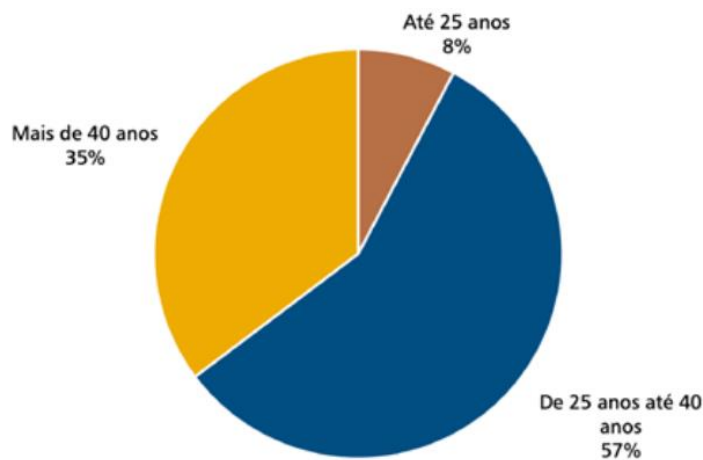


FIGURE 63 - 2022 - AGE OF SUPERVISORS (N=1030)

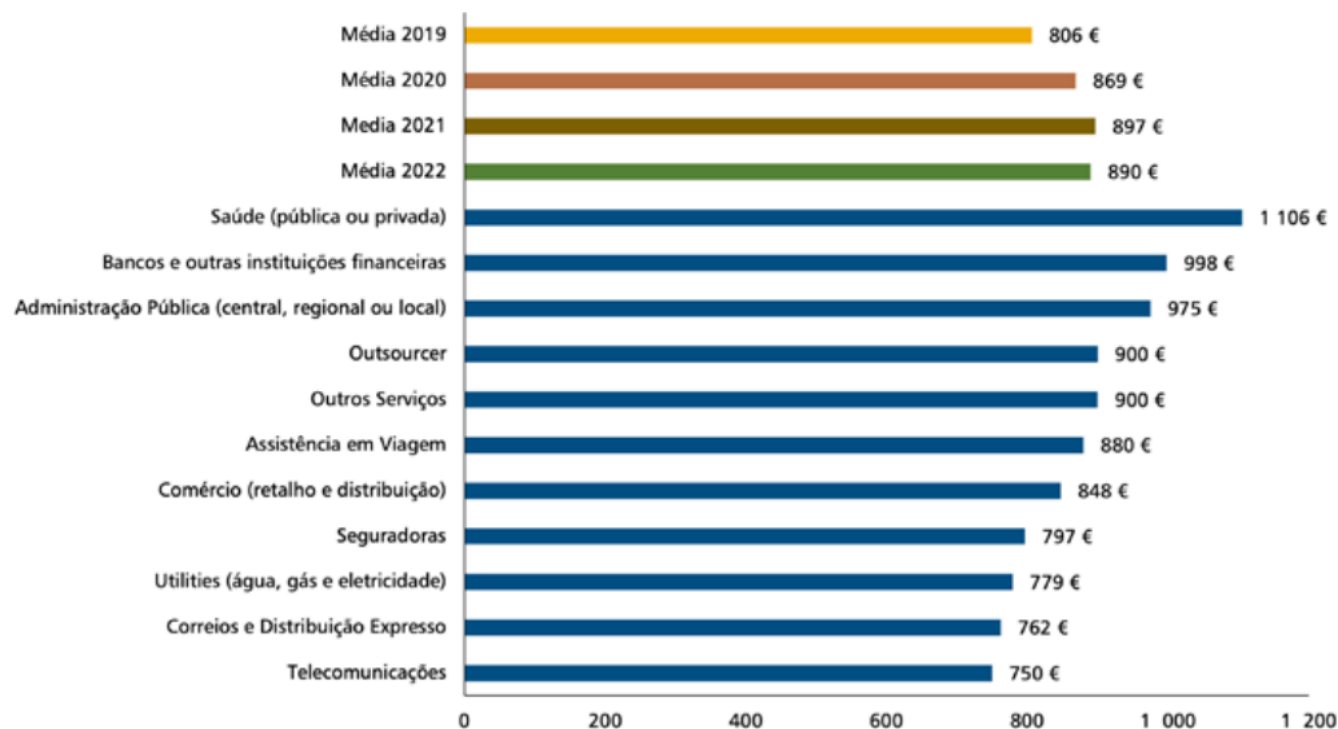


4 - Policies and Benefits

QUESTION: What is the average monthly gross salary of the Operators?

COMMENT: There is a strong trend of stagnation in the value of the average monthly gross salary of Operators, in the universe of Companies that answered this question in 2022. There is a slight reduction, compared to 2021, of 0.78%, from € 897 to € 890. The Health sector stands out for the highest values (€ 1,106) and the lowest values correspond to Telecommunications (€ 750).

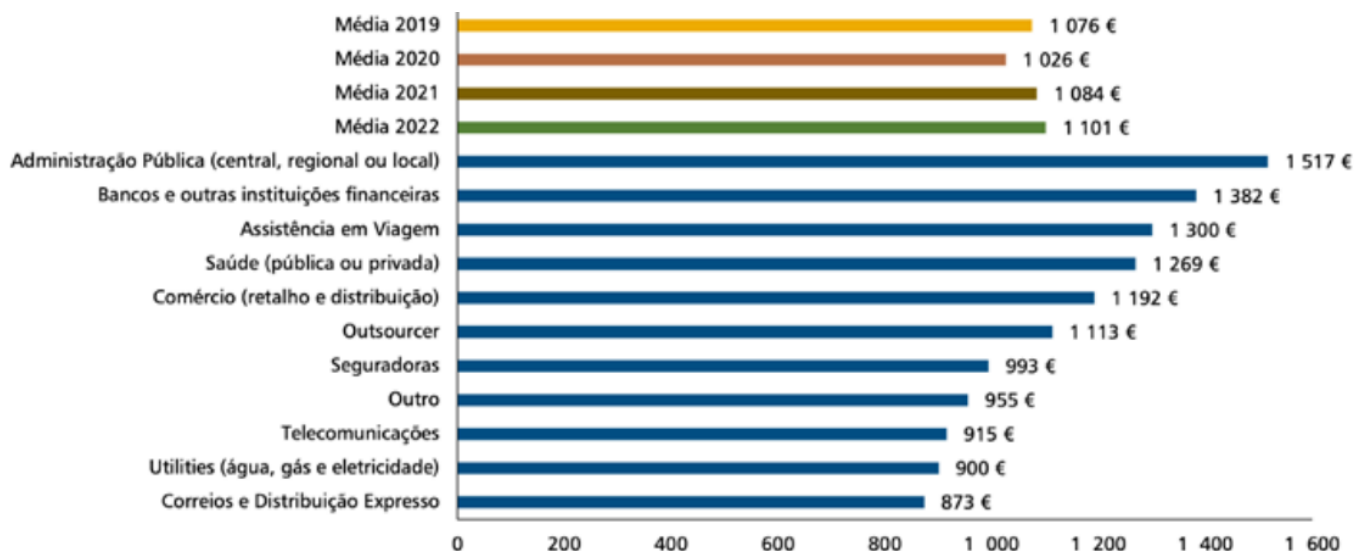
FIGURE 64 - AVERAGE MONTHLY GROSS SALARY OF OPERATORS (EUROS) (N=1064)



QUESTION: What is the average monthly gross salary of Supervisors?

COMMENT: In the universe of Companies that answered this question, the average monthly gross salary of Supervisors rose slightly, from € 1,084 to € 1,101 (+1.6%). The Public Administration has the highest average salaries (€ 1,517) and Mail and Express Distribution the lowest (€ 873).

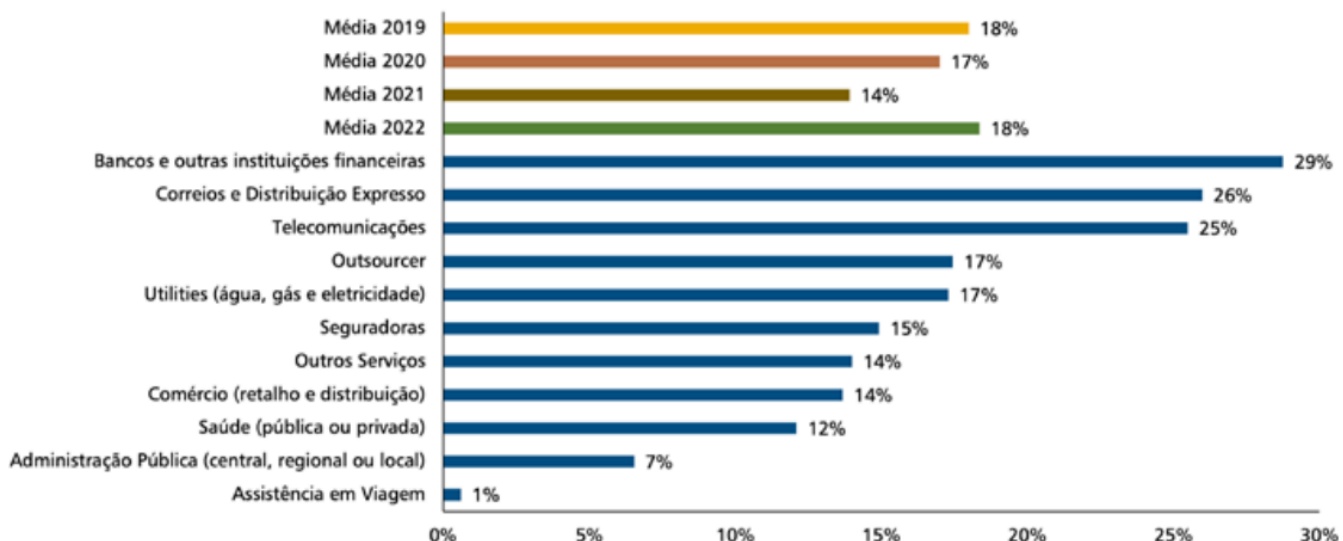
FIGURE 65 - AVERAGE MONTHLY GROSS SALARY OF SUPERVISORS (EUROS) (N=965)



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

COMMENT: The ratio of other earnings to average monthly gross wages had declined in 2020 and 2021, but has now returned to pre-pandemic levels, close to 20% (18%). The sectors with the highest ratio were Telecommunications (25%), Mail and Express Distribution (26%) and Banks and other Financial Institutions (29%). Among the sectors with the lowest ratios are Public Administration (7%) and Travel Assistance (1%).

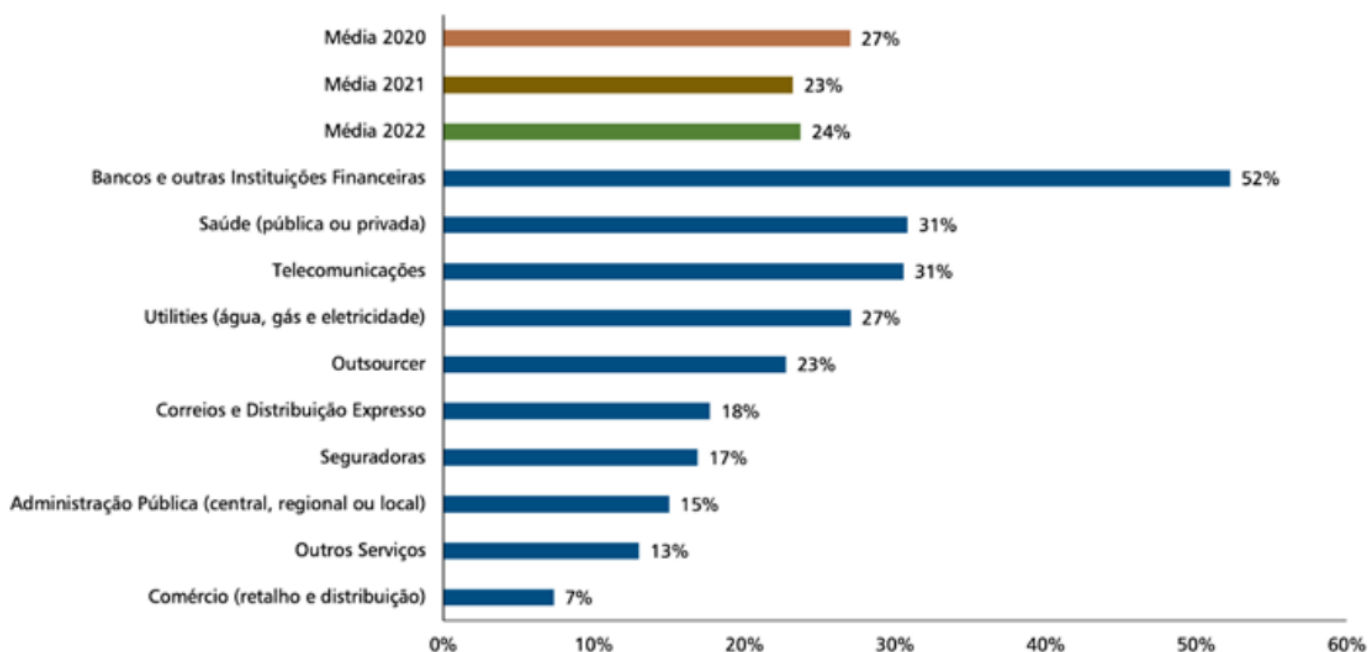
FIGURE 66 - RATIO BETWEEN OTHER REMUNERATION TO THE AVERAGE MONTHLY GROSS SALARY PER OPERATOR (N=910)



QUESTION: What is the ratio between other remunerations in relation to the gross monthly salary, per Supervisor?

COMMENT: The ratio of other earnings to the average monthly gross salary of Supervisors increased slightly (24% in 2022, 23% in 2021). Banks and other financial institutions (52%), Healthcare (31%) and Telecommunications (31%) have the highest ratios. Commerce (7%) has the lowest.

FIGURE 67 - RATIO BETWEEN OTHER REMUNERATION TO THE AVERAGE MONTHLY GROSS SALARY OF SUPERVISORS (N=753)

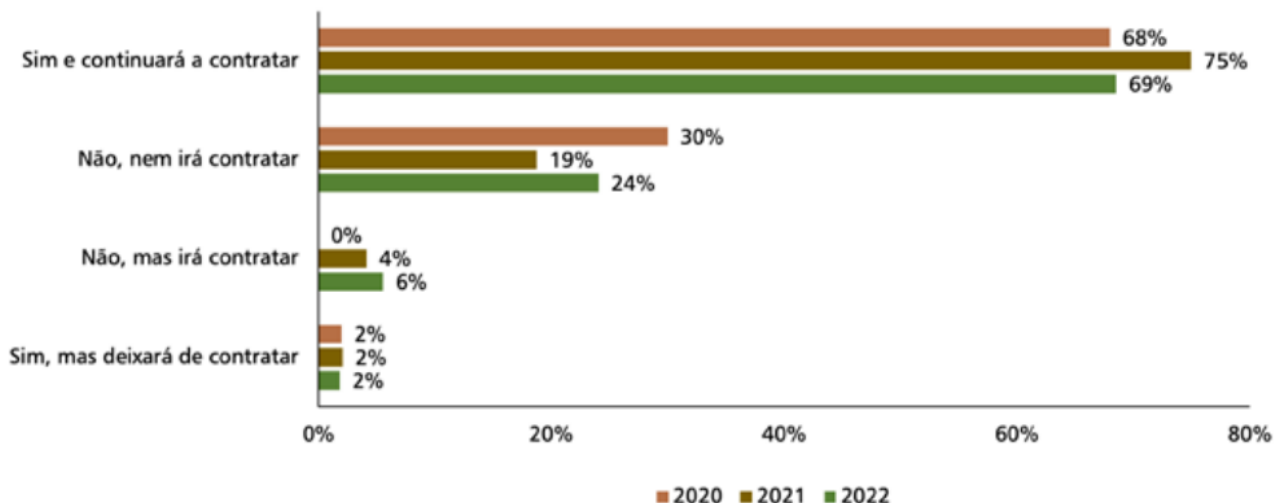


5 – Recourse to Outsourcing

QUESTION: Does the Company hire Outsourcing services for Contact Center functions?

COMMENT: Among the companies that answered this question, the tendency is to maintain a percentage close to 70% that hire and intend to maintain the hiring of outsourcing services (69%). 24% do not hire or intend to do so. Of the remainder, 6% will outsource and 2% will stop doing so.

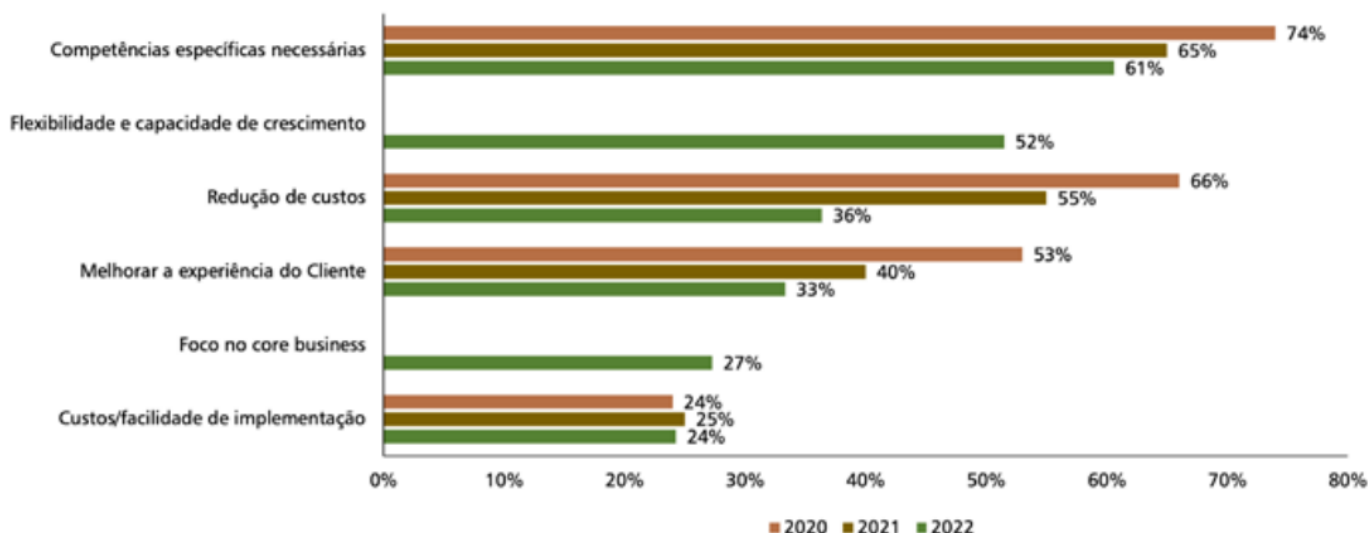
FIGURE 68 - CONTRACTING OF OUTSOURCING SERVICES (N= 645)



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

COMMENT: As noted in the Study in previous years, the need for Specific Competencies is the most determining factor for the decision to hire Outsourcers (61% in 2022 and 65% in 2021).

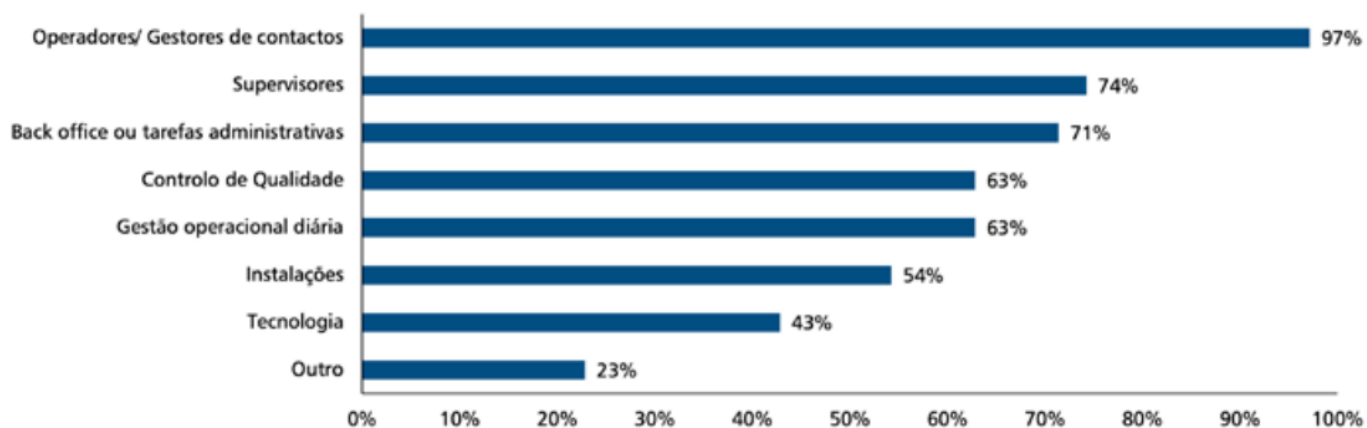
FIGURE 69 - REASONS FOR HIRING OUTSOURCING SERVICES (N= 234)



QUESTION: What services are contracted in the Outsourcing model?

COMMENT: Respondents who hire on an Outsourcing basis mainly use the services of Operators / Contact Managers (97%), Supervisors (74%) and Back office or administrative tasks (71%). The least contracted services correspond to Technology (43%).

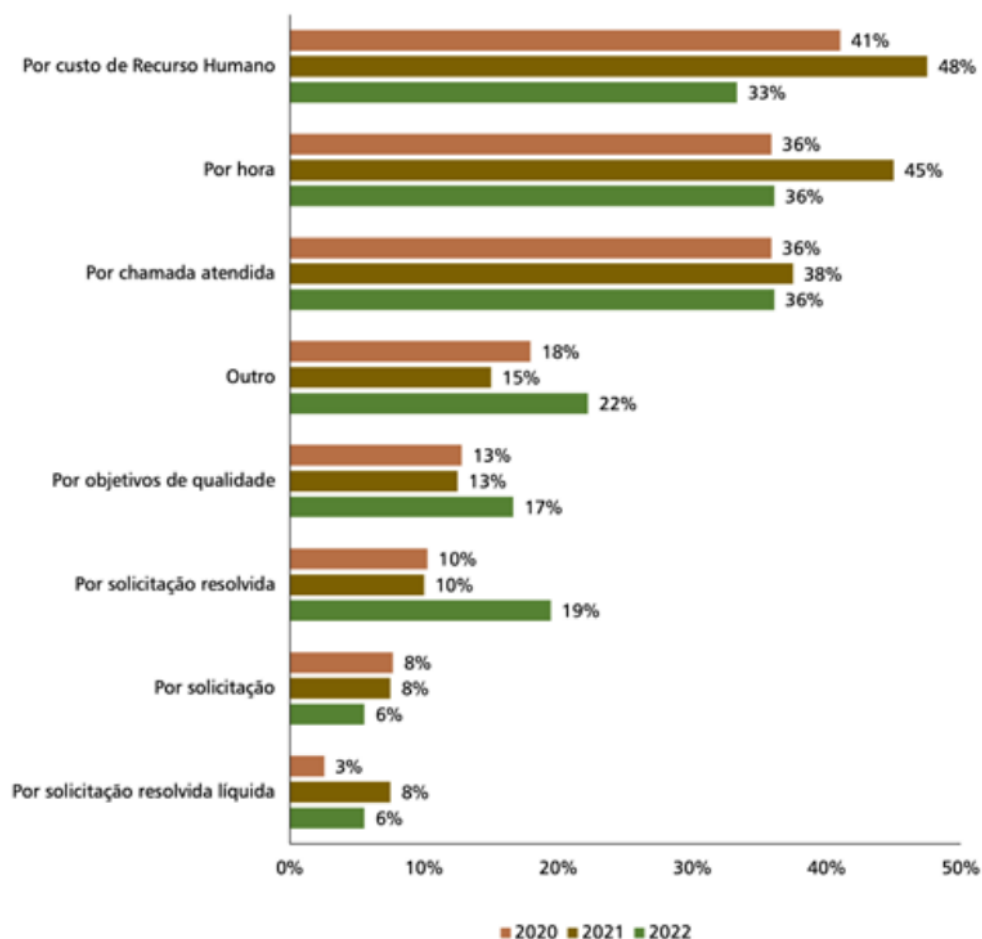
FIGURE 70 - SERVICES CONTRACTED IN OUTSOURCING MODEL (N=345)



QUESTION: What is Outsourcer's compensation model?

COMMENT: Outsourcer's "By Human Resource Cost" and "Per Hour" compensation models have reduced their relative weight, although they are still very significant (33% and 36% respectively). "Compensation per Answered Call" stabilized at 36%. Other alternative models are globally growing.

FIGURE 71 - OUTSOURCER COMPENSATION MODEL (N=354)

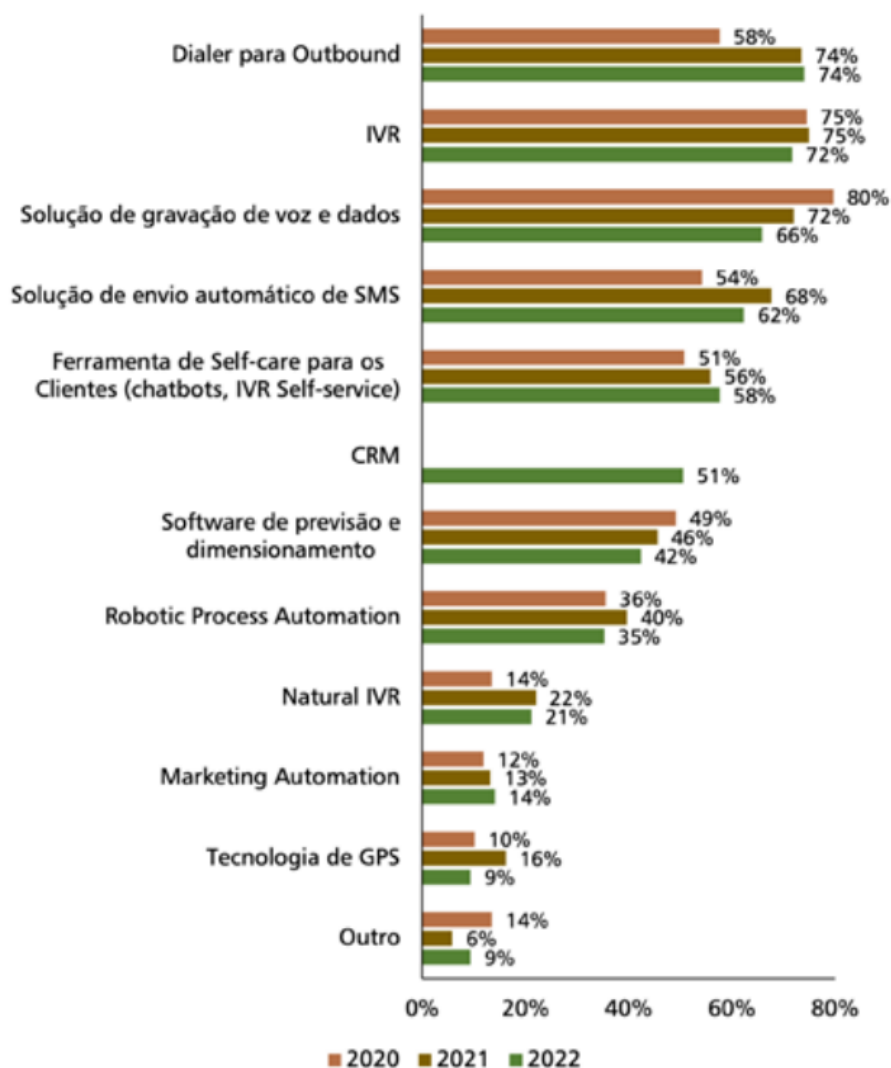


6 – Technology

QUESTION: What are the main technological solutions used?

COMMENT: Most Contact Centers have Dialer for Outbound (74%), IVR (72%), Voice and Data Recording Solution (66%), Automatic SMS Sending Solution (62%), Self-care Tools (58%) and CRM (51%). The technologies that show sustained growth are those of Self-care and Marketing Automation. Conversely, Voice and Data Recording Solutions and Forecasting and Scaling Software.

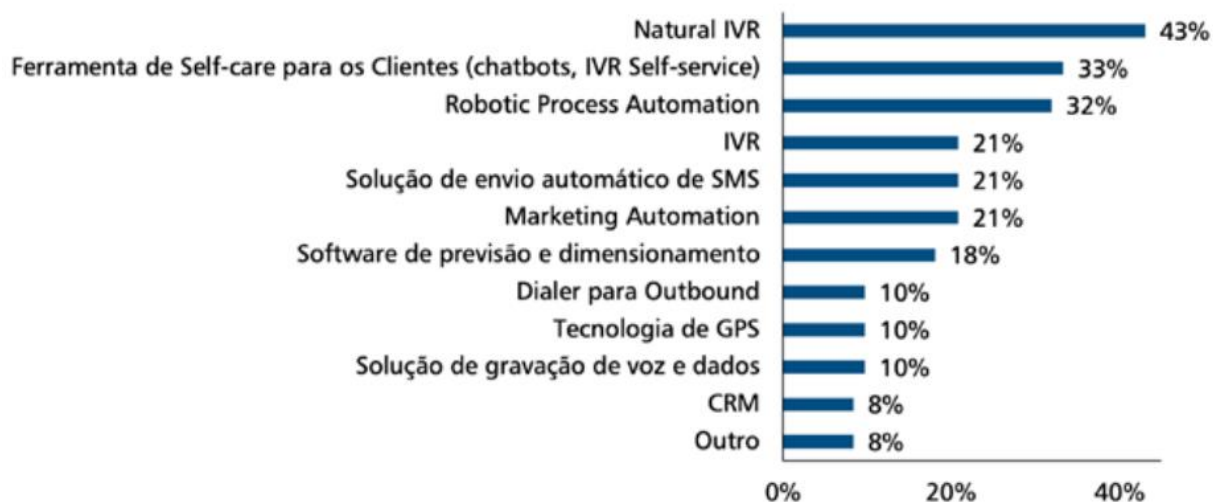
FIGURE 72 - MAIN TECHNOLOGICAL SOLUTIONS USED (N= 1175)



QUESTION: What are the main technological solutions to be implemented in the future?

COMMENT: The technological solutions that respondents most say may be implemented in the future are the Natural IVR (43%), Self-care Tools (33%) and RPA (Robotic Process Automation - 32%), a trend that was already verified in last year's Study. Dialer for Outbound, GPS, Voice and Data Recording Solution and CRM are the solutions with the least possibility of future implementation.

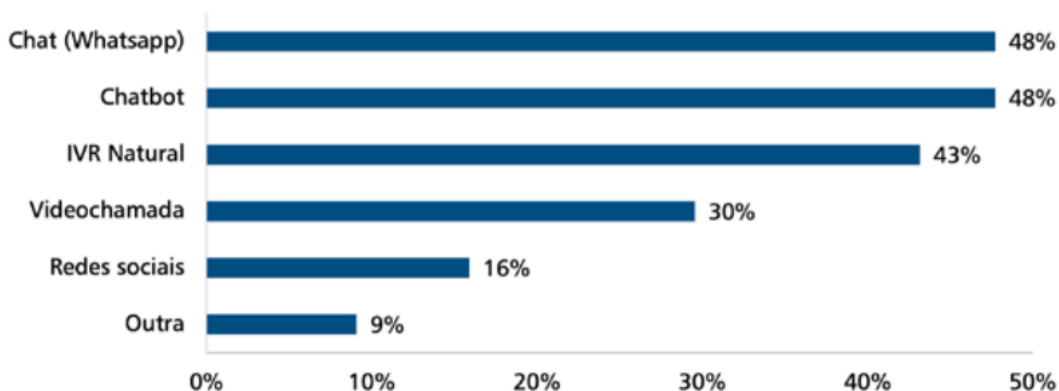
FIGURE 73 - TECHNOLOGICAL SOLUTIONS TO BE IMPLEMENTED IN THE FUTURE (N= 913)



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

COMMENT: Regarding the adoption of new channels, Chatbots and WhatsApp are indicated by almost 50% of the Companies that responded (48%), having registered an increase compared to the previous year (33% and 40% respectively). Social networks (16%) is the least mentioned channel.

FIGURE 74 - NEW CHANNELS TO BE USED IN THE FUTURE (N=804)



QUESTION: What is the percentage of calls by Bots?

COMMENT: Among the Companies that provide Bots, the average percentage of calls provided by Bots was 27%, which represents a slight decrease compared to the previous year. The sectors that stood out were Commerce (85%) and Banks and other Financial Institutions (57%), which were already the sectors with the most intensive use in 2021. The lowest percentage occurs in Telecommunications (3%).

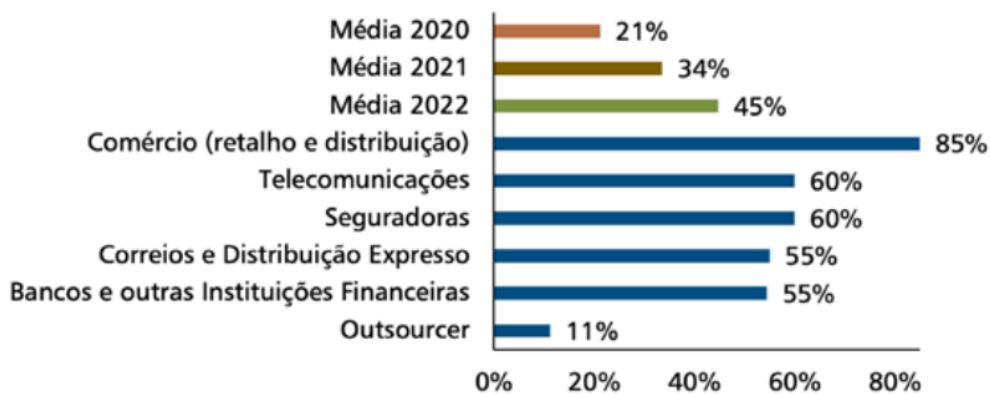
FIGURE 75 - PERCENTAGE OF BOT CALLS (N=137)



QUESTION: What percentage of requests are resolved by Bots?

COMMENT: The average percentage of requests resolved by bots continues to increase significantly, year after year, being already close to 50% (45%). This figure was highest in the Commerce sector (85%), which was already the most intensive sector in 2021. All other sectors, with the exception of Outsourcers, already have more than half of the requests resolved by this route. The percentage among Outsourcers is only 11%.

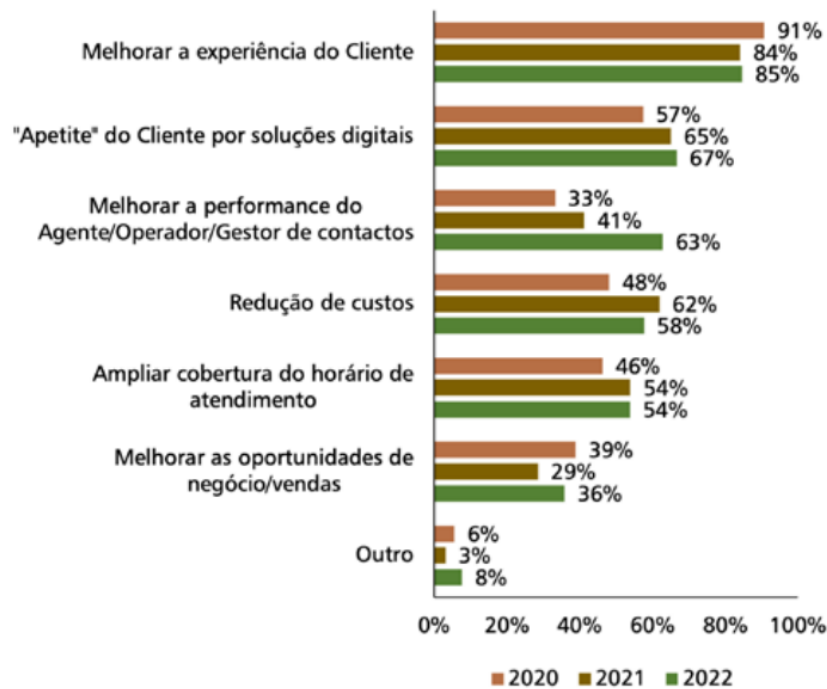
FIGURE 76 - PERCENTAGE OF REQUESTS RESOLVED BY BOTS (N=137)



QUESTION: What are the main reasons to offer Self-care tools/channels?

COMMENT: Improving the customer experience continues to be the main reason for the implementation of self-care service channels (85% of companies refer to it). Customer Appetite for More Digital Solutions is also very significant and is gradually growing (67%). Agent Performance Improvement is growing rapidly and is already the third reason pointed out (63%).

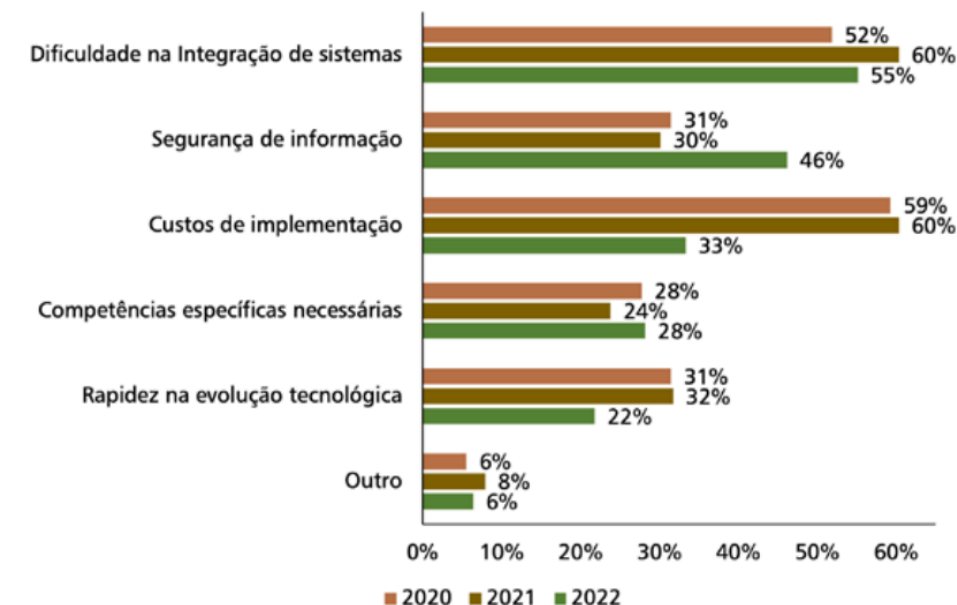
FIGURE 77 - REASONS TO OFFER SELF-CARE TOOLS/CHANNELS (N=1097)



QUESTION: What are the biggest challenges in establishing efficient self-care solutions?

COMMENT: 2022 represents a profound change in the challenges identified by Companies. In 2020 and 2021 Implementation Costs were the first reason presented. It has now become the 3rd, having been nominated by 1/3 of the Companies. More than half (55%) now indicate the Difficulty in Systems Integration as the biggest challenge. Information Security (46%) showed a significant increase from 2021 to 2022.

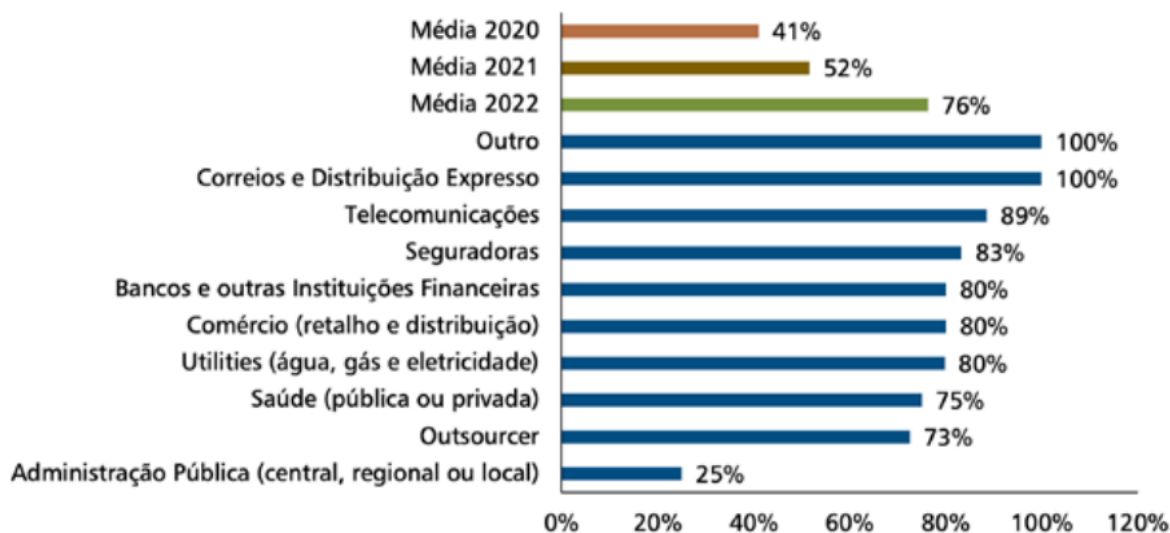
FIGURE 78 - CHALLENGES TO ESTABLISH EFFICIENT SELF-CARE SOLUTIONS (N=1097)



QUESTION: What percentage of use of a cloud-based technology model, by industry?

COMMENT: The use of cloud-based technology models has been increasing rapidly. It had already seen a considerable increase between 2020 and 2021 (from 41% to 52%). The jump has now gone to 76%. Except for the sectors of Public Administration and Travel Assistance, all the others have a weight of the Cloud option greater than 70%, even reaching 100% in Mail and Express Distribution.

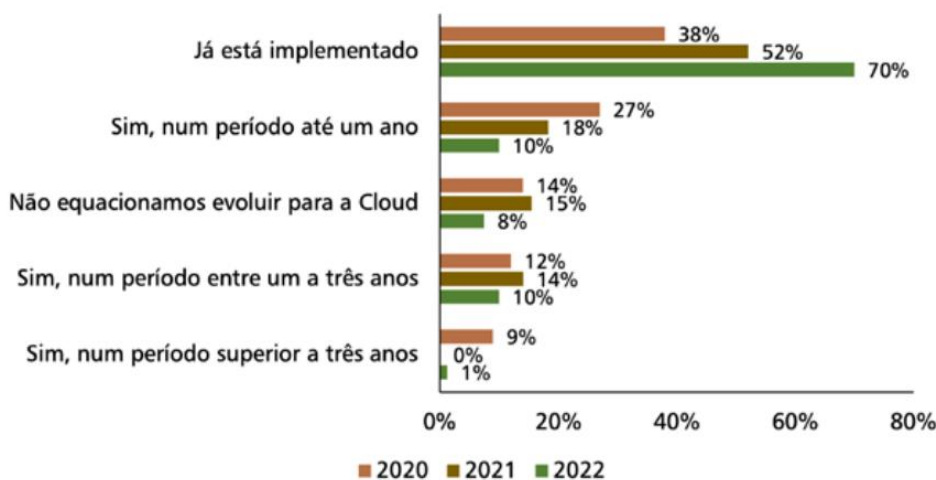
FIGURE 79 - USE OF CLOUD-BASED TECHNOLOGY MODEL (N=904)



QUESTION: Do you consider evolving your Contact Center to the Cloud?

COMMENT: As you would expect, since a very considerable part of Contact Centers is already based in the Cloud, the intention of future adoption tends to decrease. With 70% of companies already in place, 20% intend to do so in the next three years and virtually all the rest do not intend to move to the cloud (8%). We will probably see the stabilization of this trend in the coming years, with the maintenance of a relatively small number of Contact Centers that will not have their technology based on the Cloud.

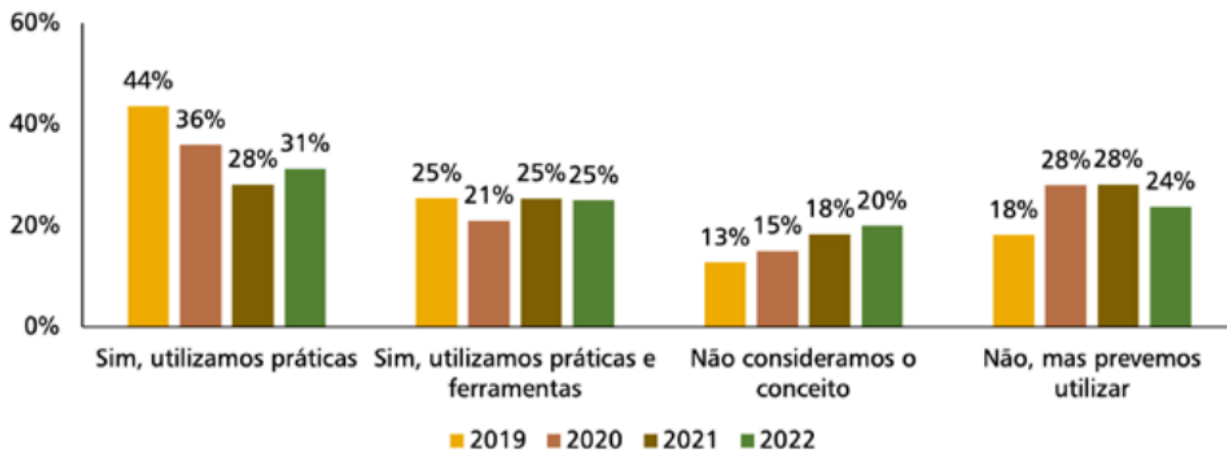
FIGURE 80 - INTENT TO EVOLVE FROM THE CONTACT CENTER TO THE CLOUD (N=1161)



QUESTION: Does your organization use Gamification tools?

COMMENT: The use of Gamification has come down with the pandemic and has stabilized at relatively high levels. 56% use Gamification practices and/or tools (value comparable to 2020 and 2021, but much lower than 2019, when it reached 69%). 20% do not consider the concept and 24% intend to use it.

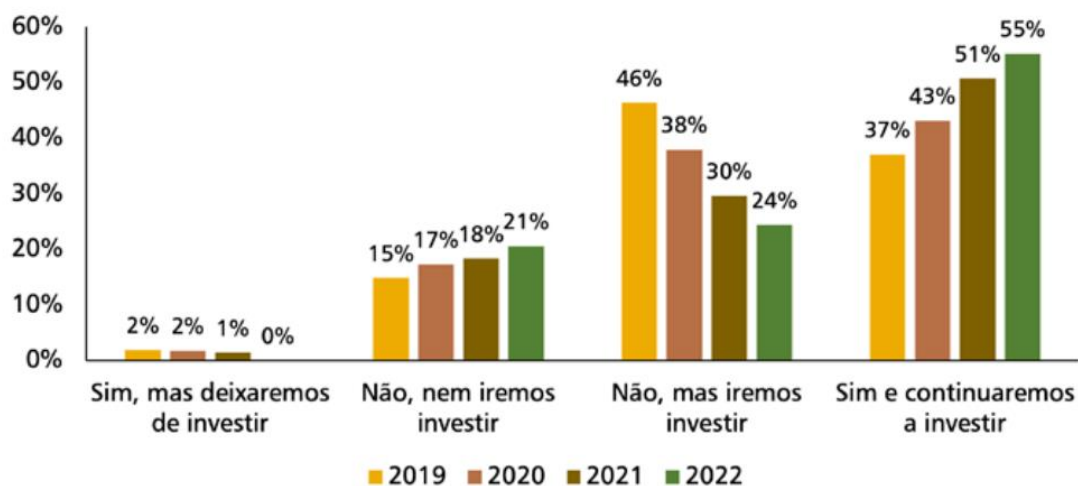
FIGURE 81 - USE OF GAMIFICATION TOOLS AND PRACTICES (N=1112)



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

COMMENT: Of the companies surveyed, the majority (55%) already invest in RPA and intend to continue investing, a number that has been growing year after year. Companies that do not invest but will invest in the future have also been progressively decreasing. There is also a slight increase in companies that do not have investment forecasts. We are likely to see a stabilization of a large number of RPA companies.

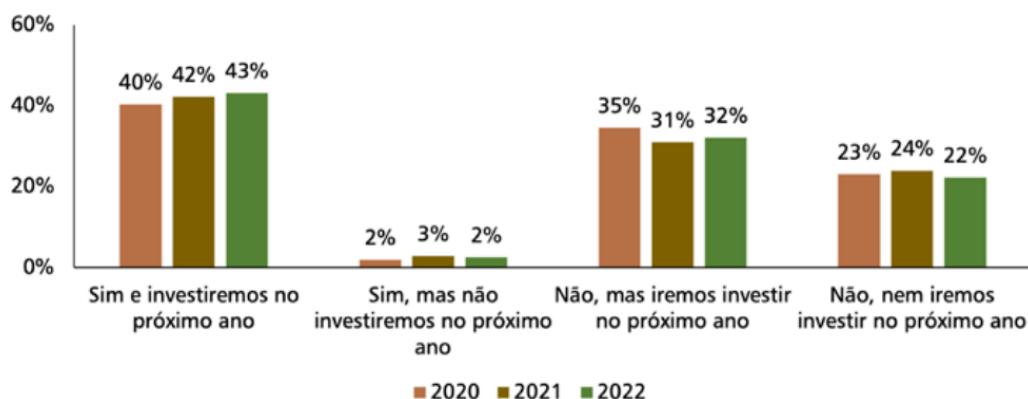
FIGURE 82 - INVESTIMENTO EM ROBOTIC PROCESS AUTOMATION (N=1108)



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

COMMENT: Investment in AI shows a gradual growth over the years. Companies that invest and will continue to invest in AI exceed 40% (43%). Those that do not yet but intend to do so are about 1/3 (32% in 2022). And those that don't intend to do so are just 22% in 2022, the lowest figure since 2020.) The number of companies that indicate they want to stop investing is residual.

FIGURE 83 - INVESTMENT IN SOLUTIONS BASED ON ARTIFICIAL INTELLIGENCE (N=883)



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

COMMENT: The overwhelming majority of companies invest and will continue to invest in Omnichannel solutions (70%, a relatively stable value in recent years). A still relevant amount does not invest, but intends to do so (15%), the same percentage that does not intend to do so. No company that has invested in Omnichannel has reported failing to do so.74.

FIGURE 84 - 2020 OMNICHANNEL SOLUTION (N=900)

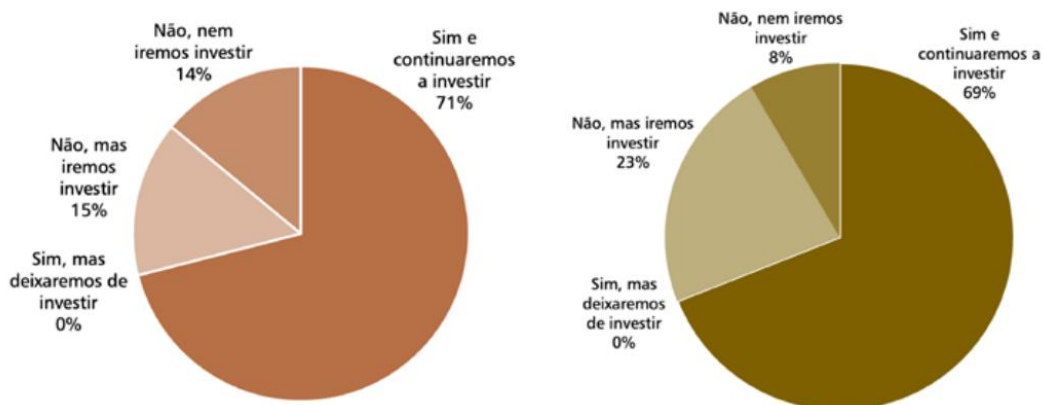
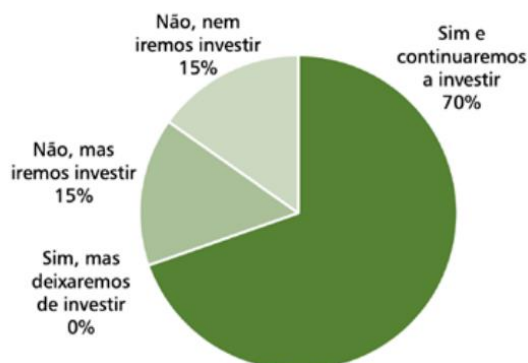


FIGURE 85 - 2021 OMNICHANNEL SOLUTION (N=883)

FIGURE 86 - 2022 OMNICHANNEL SOLUTION (N=1106)



QUESTION: Do you currently invest in Bots?

COMMENT: 45% of respondents invest and will continue to invest in Bots. 41.3% still don't do it but they will. 13.8% do not intend to do so. Of the companies that already invest, none say they want to stop doing so. Compared to the previous year, there is a slight increase in the number of companies that report investing in Bots but also, curiously, of those that do not intend to do so.

FIGURE 87 - 2021 CURRENTLY INVESTS IN BOTS (N=883)

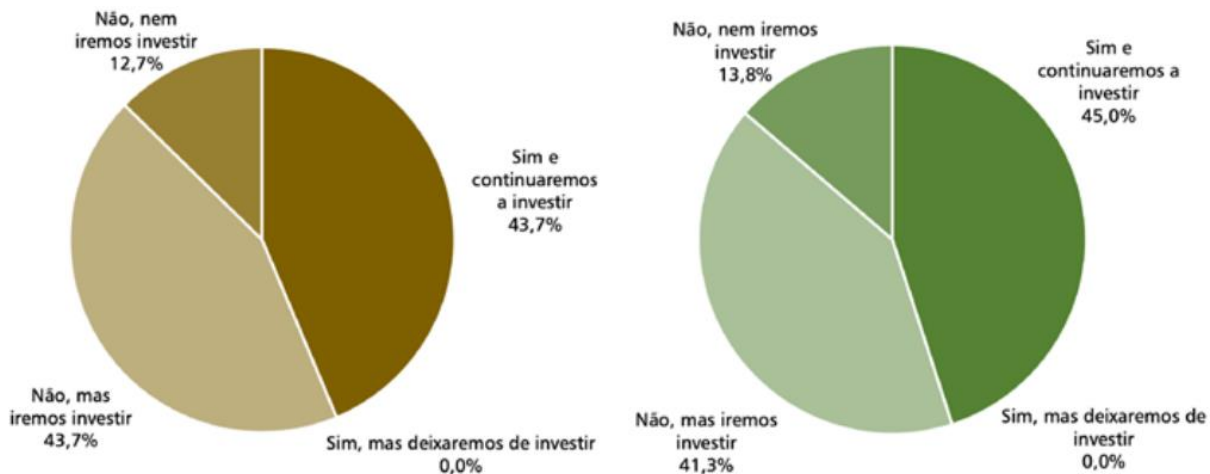


FIGURE 88 - 2022 CURRENTLY INVESTS IN BOTS (N=1112)

QUESTION: Are you currently investing in Machine Learning?

COMMENT: Investment in Machine Learning shows a slight decrease compared to the previous year (The percentage of companies that say they invest and will continue to invest is 36% in 2022, compared to 39% in 2021). However, the intention for future investment increased to 41% in 2022 from 38% in 2021.

FIGURE 89 - 2021 CURRENTLY INVESTS IN MACHINE LEARNING (N=883)

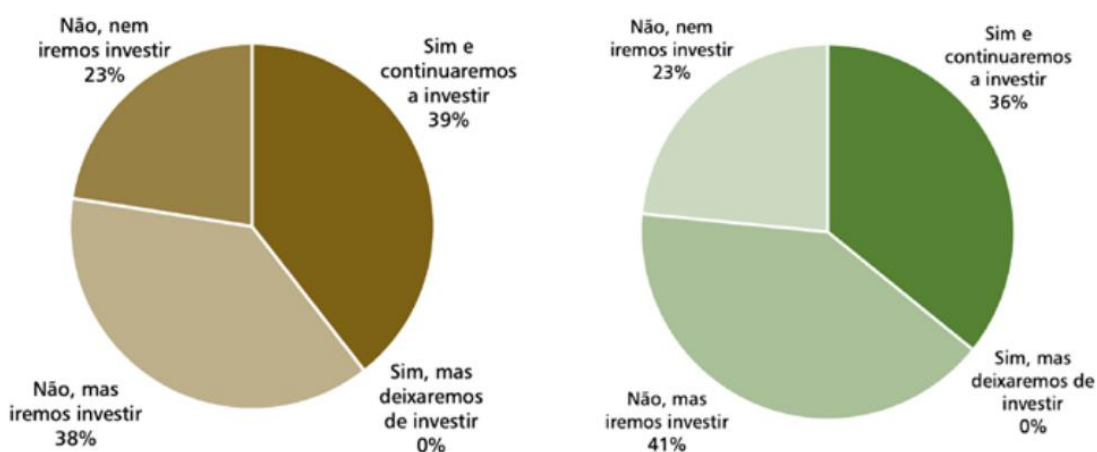


FIGURE 90 - 2022 CURRENTLY INVESTS IN MACHINE LEARNING (N=1113)

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

COMMENT: The percentage of companies investing in Speech to Text solutions gradually increases (from 20.7% in 2020 to 23.9% in 2021 and 25% in 2022). Companies that do not do so but intend to do so remain close to 50% (48.8%). Companies that do not intend to do so have been falling, now standing at 26.3%.

FIGURE 91 - 2020 SOLUÇÕES DE SPEECH TO TEXT (N=900)

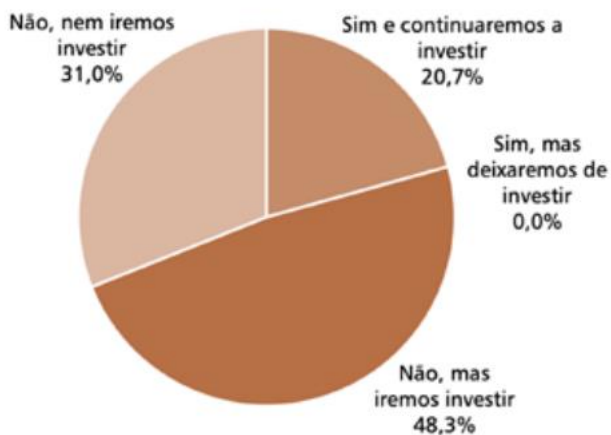
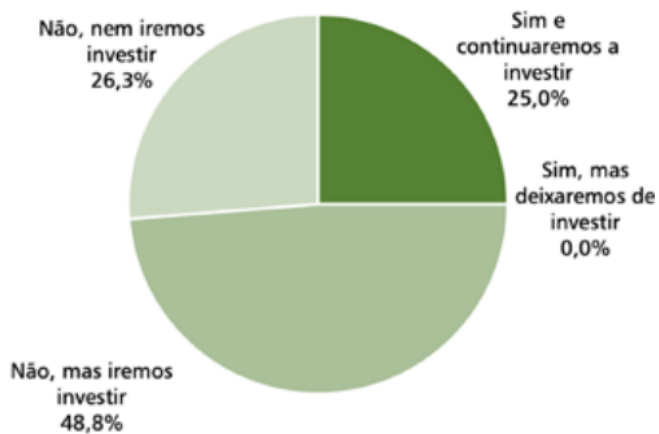


FIGURE 92 - 2021 SOLUÇÕES DE SPEECH TO TEXT (N=883)

FIGURE 93 - 2022 SPEECH TO TEXT SOLUTIONS (N=1112)



7 – Continuous Improvement

QUESTION: What customer satisfaction metrics do you use?

COMMENT: The number of helplines that responded to this question increased by 60% from 2021 to 2022. This year, the most used metric is the NPS (Net Promoter Score) reaching 51% of the total metrics reported. This was followed by the CSAT (Customer Satisfaction Score) with 33% of references and the CES (Customer Effort Score) with 10%.

FIGURE 94 - 2021 CUSTOMER SATISFACTION RATING METRICS (N=579)

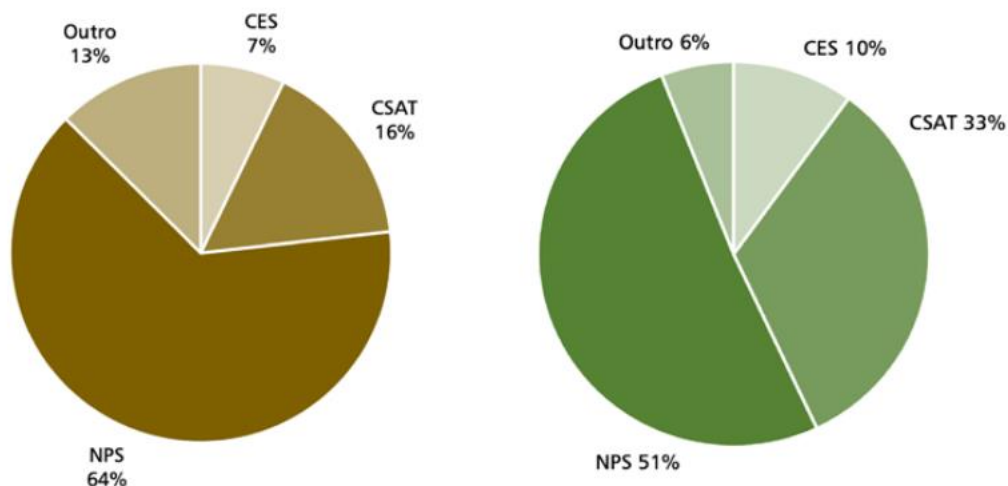


FIGURE 95 - 2022 CUSTOMER SATISFACTION ASSESSMENT METRICS (N=973)

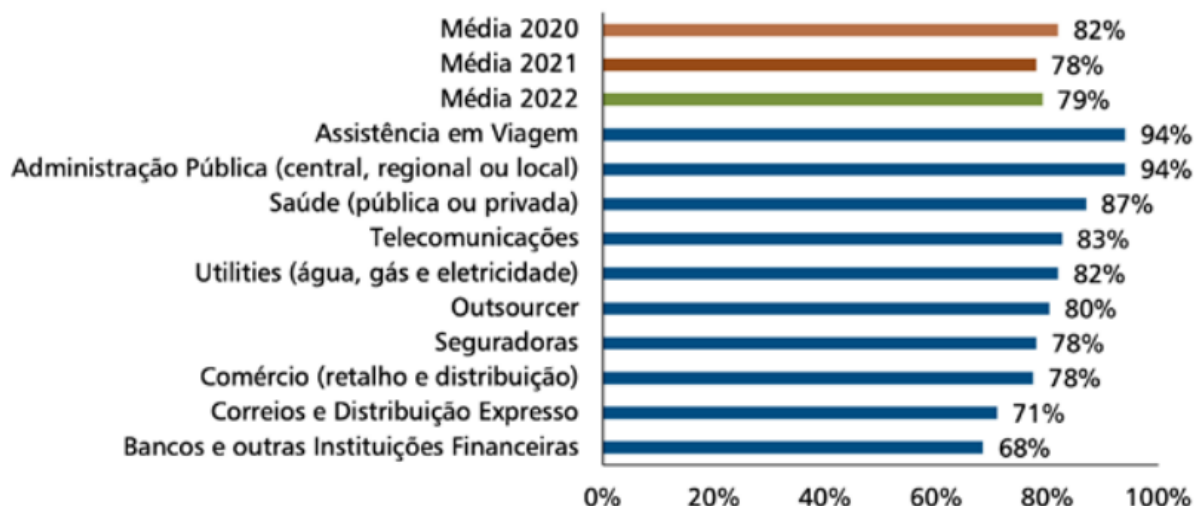
QUESTION: Are customer satisfaction surveys conducted to measure the quality of service? If so, what is the average rating obtained in 2022 on a scale of 0% to 100%?

COMMENT: 62% of companies conduct satisfaction surveys. The average rating remains, as in previous years, close to 80% (79% in 2022). Travel assistance and Public Administration have the highest values (both with 94%). Mail and Express Distribution (71%) and Banks and other Financial Institutions (68%) have the lowest average results.

FIGURE 96 - CONDUCTING SATISFACTION SURVEYS (N= 718)



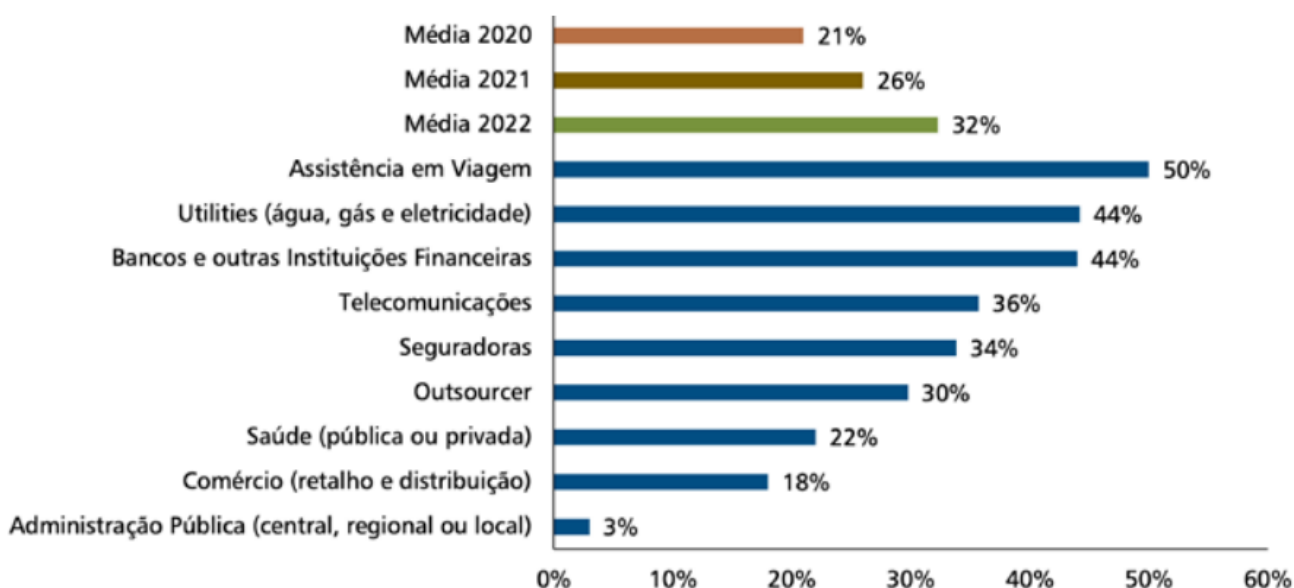
FIGURE 97 - AVERAGE CUSTOMER SATISFACTION SURVEY RATING (N= 458)



QUESTION: What is the percentage of calls in 2022 with quality measurement evaluated by the Customer (through satisfaction survey)?

COMMENT: The percentage of calls with quality measurement evaluated by the Customer continues to increase (21% in 2020, 26% in 2021, 32% in 2022). In Travel Assistance this percentage even reaches 50%. In the Public Administration, only 3% are the target of measurement.

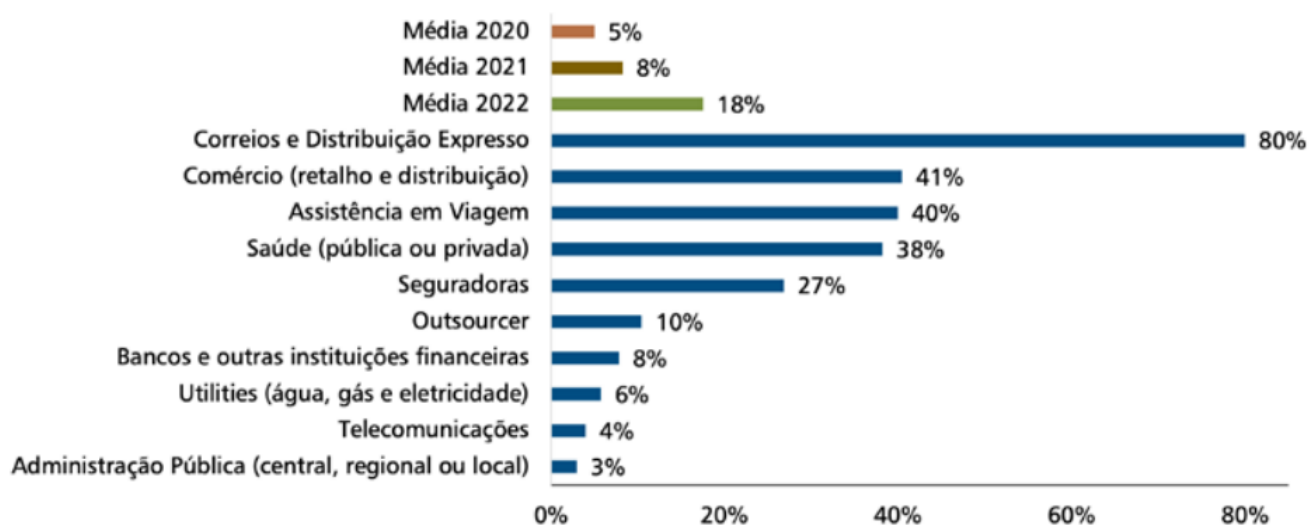
FIGURE 98 - PERCENTAGE OF CALLS THAT HAVE CUSTOMER-ASSESSED QUALITY MEASUREMENT (N=517)



QUESTION: What percentage of contacts are targeted by internal monitoring in 2022?

COMMENT: In 2022 the effort of internal monitoring to contacts had a very significant reinforcement, reaching 18%, when it was 8% in 2021. The sector with the greatest prominence is Mail and Express Distribution, with 80%, with the lowest value in the Public Administration, with 3%.

FIGURE 99 - PERCENTAGE OF CONTACTS WHO ARE SUBJECT TO INTERNAL MONITORING (N=597)



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

COMMENT: The most frequent certifications are ISO 9001 (66%) and the APCC Quality Seal (45%). It should be noted that 18% of the companies indicate that they do not have any certification but would like to have and 6% indicated that they are in the process of certification. The widespread increase in certifications among contact centers is notorious.

FIGURE 100 - MAIN CONTACT CENTER CERTIFICATIONS (N=1163)



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

COMMENT: Receipt of Incorrect or Incomplete Information (40%), Billing and Charges (33%) and Technical Failures/Problems (31%) are the most common reasons for complaints received. Despite maintaining comparatively lower values, complaints about Operator Empathy, Communication Problems and Connection Transfers are increasing year after year.

FIGURE 101 - REASONS FOR COMPLAINTS RECEIVED FROM THE CONTACT CENTER SERVICE (N=971)



QUESTION: Do you currently invest in projects that aim to improve the Customer Experience?

COMMENT: The percentage of respondents who say that they already invest in Customer Experience and that they will continue to invest is 83%, a figure slightly higher than the previous year (82%). The rest do not invest but intend to invest in the future.

FIGURE 102 - 2021 INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (N=883)

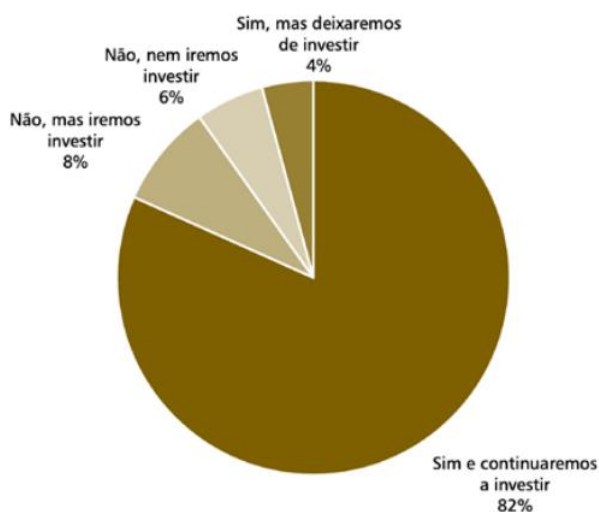
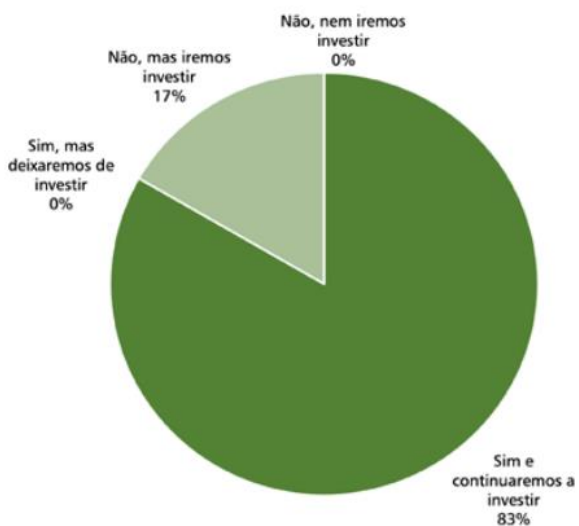


FIGURE 103 - 2022 INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (N=1053)



8 – Financial Data

QUESTION: What is the annual turnover of the Contact Center?

COMMENT: The determination of the volume billed in 2022 in the Contact Center Industry could never result from the determination of the answers to this question, because they are only from a sample of the universe, even if it is a highly representative sample, more than 50%. In addition, only 478 of the 1182 (40.4%) transactions that responded to the survey answered this question. Still, it should be noted that the amount calculated this year was 814.8 million euros, 35% more than the amount calculated in 2021. This increase should be relativized, since in 2022 there were more operations to respond than in 2021 (478 against 316). Of the total amount calculated, 95.1% correspond to the billing of Outsourcers.

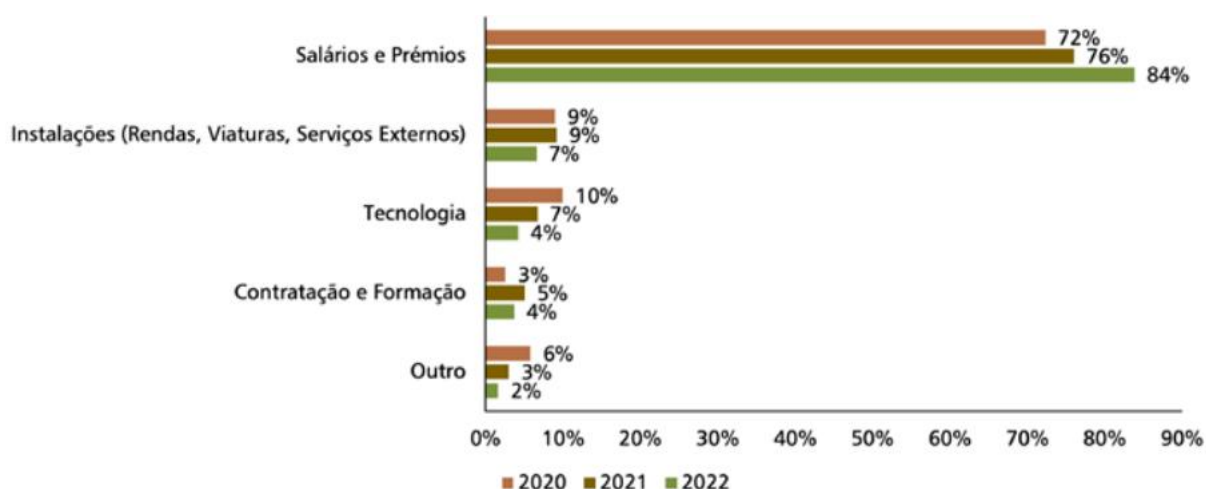
FIGURE 104 - SAMPLE TURNOVER (IN THOUSANDS OF EUROS) (N= 478)



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

COMMENT: Following the trend of previous years, the salary and premium component has been increasing its weight in operating costs, having gone from 72% in 2020 to 76% in 2021 and 84% in 2022. Naturally, all the other components have decreased their relative weight, especially the technology component.

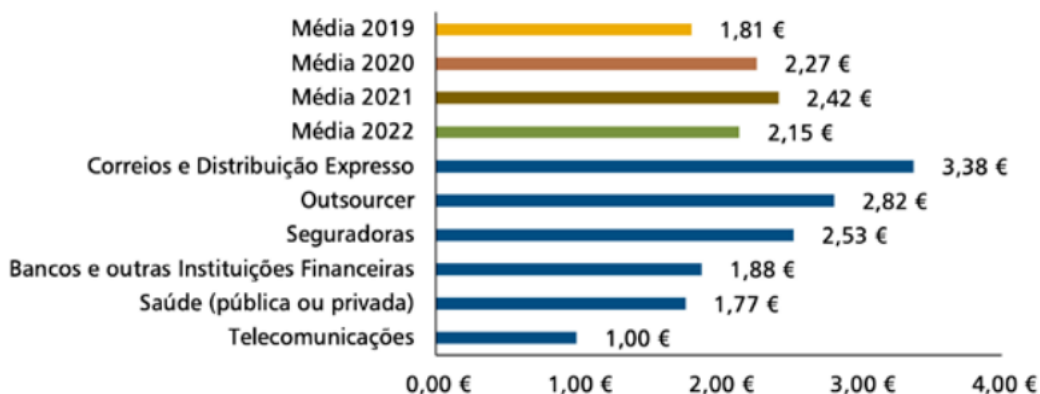
FIGURE 105 - DISTRIBUTION OF OPEX BY MAIN RUBRICS (N=286)



QUESTION: What is the average cost per resolved request? (In euro)

COMMENT: The average cost per resolved request has increased compared to 2021 (from €2.66 to €3.77). The sector with the highest costs was Health, with € 8.32. All other sectors have values between € 2.67 and € 3.05. Given the small number of answers to this question, these results should be analyzed with reservation.

FIGURE 106 - AVERAGE COST PER CONTACT (N=126)



QUESTION: What is the average cost per resolved request? (In euro)

COMMENT: The average cost per resolved request has increased compared to 2021 (from €2.66 to €3.77). The sector with the highest costs was Health, with € 8.32. All other sectors have values between € 2.67 and € 3.05. Given the small number of answers to this question, these results should be analyzed with reservation.

FIGURE 107 - AVERAGE COST PER RESOLVED REQUEST



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