

AI

ESTUDO
DE CARACTERIZAÇÃO
E BENCHMARKING

APOIO:



ATIVIDADE
DE CONTACT CENTERS

2024

randstad @edp

AGENTIF AI concentrix Enghouse Interactive GENESYS Go contact
a broadvoice company

intelcia salesforce Teleperformance vodafone

NEWSPRING SERVICES ctt CCO ASSISTÊNCIA automaize foundever Konecta Rh mais Seamlly talkdesk

INDEX

| | |
|---------------------|---|
| Preface | 3 |
| Methodological Note | 4 |
| Executive Summary | 6 |

STUDY

| | |
|----------------------------|----|
| 1. Characterization | 10 |
| 2. Operational Performance | 15 |
| 3. Human resources | 25 |
| 4. Policies & Benefits | 38 |
| 5. Resort to Outsourcing | 41 |
| 6. Technology | 43 |
| 7. Continuous Improvement | 52 |
| 8. Financial Data | 57 |

PREFACE

APCC started its annual Study of Characterization and Benchmarking of Contact Center Activity in 2006 and this initiative has been progressively gaining space among the most important decision-making tools of those responsible for the management of Companies in this truly relevant Industry.

With a meticulous degree of detail, operational performance, Human Resources characteristics or investment decisions in Technology, to name just a few of the aspects most valued by our Associates and by all Entities, public or private, with a relevant interest in our Sector.

In addition to this significant role as an instrument to support management decisions, the APCC Benchmarking Study is also a perfect response to all those who insist on unfairly defaming an activity of decisive importance for the success of the companies it serves, for economic development and for job creation.

The success achieved in the successive editions of the Study is the result of the collaboration of all the Companies that agree to answer the questionnaire sent by the APCC and we are grateful for their indispensable and valuable participation.

In this 2024 edition, we consolidated the information collected from 1,542 Operations, in which 61,037 Employees work, almost 60% of the national universe of the Sector, which gives the data disclosed in the Study a reliability incomparable to any other similar initiative.

This unusual representativeness and the degree of detail of the Study highly appreciated by our partners, Associations representing Contact Centers from other European countries, congregated in the ECCA – European Customer Contact Alliance.

To respond to this interest, APCC has been preparing an English language version since 2016, also available on our website.

Hoping that our Associates and all those who express interest in our Sector will enjoy the 2024 edition, we once again express our gratitude to all those who made this initiative possible and enriched with their responses.

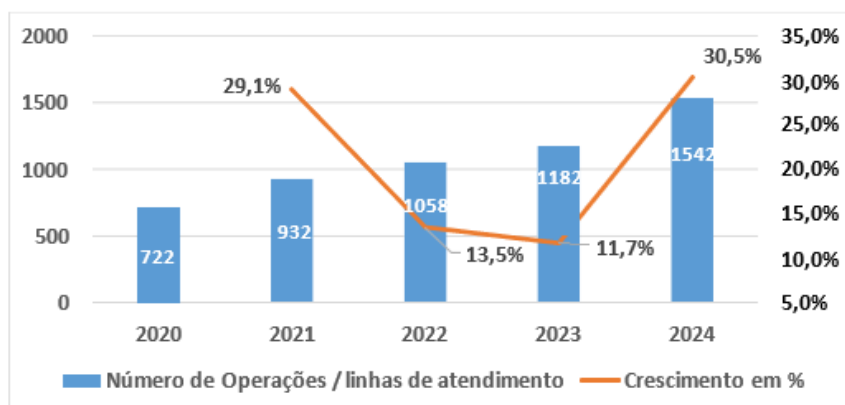
We also note, with satisfaction, the commitment, rigor, and competence put into the execution of this work by Jorge Pires of Empathy Believer and his technicians.

Ana Gonçalves

Secretary-General

METHODOLOGICAL NOTE

Carried out on data from the 2023 financial year, the 2024 edition of the Characterization and Benchmarking Study of Contact Center Activity in Portugal was the result of the consolidation of data from the responses of 1,542 operations/service lines, made available by Companies and Institutions from the most varied sectors of economic activity: Public Administration and Social Sector, Travel Assistance, Banks and other Financial Institutions, Commerce, Mail and Express Distribution, Industry, Health, Insurance, Security, Telecommunications, Tourism, Utilities and Other Services. The growth in the number of operations/service lines registered this year is remarkable, +30.5%, following the presentation in recent years.



The number of employees who are part of these operations/service lines also reached a new high of 61,037, 17.1% more than in the 2023 edition. Considering that the universe of Employees in this Industry was 104,000, according to the 2021 Sizing Study, we can conclude that the sample will be between 57 and 58.7% of the universe.

This sample size ensures statistical certainty of the data collected, within a margin of error of 0.3% for a 99% confidence level.

To facilitate comparability, the Study is organized into the following chapters:

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

All the information collected uses global terms, by sector of economic activity and by nature. When relevant, the information appears by region: District and Autonomous Region. Data treated with all statistical rigor and with the utmost respect for confidentiality in relation to all the information collected.

In the case of data from the Human Resources and Policies and Benefits chapters, the values presented correspond to averages weighted by the size of the respondent operations/service lines. Certain that the main merit of the Study lies in all those who contribute to it, the authors express our gratitude to all the Companies and Institutions that responded to the survey for their willingness to participate in this task and for the attention and, often, patience with which they welcomed our contacts. A word of praise for the work developed in previous editions, by Happy Work, NTT Data/everis and KPMG, for the inspiring example of their efforts, rigor, and competence.

Finally, thanks are also due to the APCC Board of Directors, for the trust placed in us and its Services, with special emphasis on the Secretary General, for the excellent collaboration and support provided throughout the execution of the work.



EXECUTIVE SUMMARY

Characterization

As in previous years, operations/service lines located in all Districts and Autonomous Regions, without exception, responded to the APCC Benchmarking Study. The presence throughout the country continues to be a reality of this Industry, which thus contributes to the development of less favored regions, settling population and making significant investments.

Notwithstanding this spread throughout the national territory, the predominance remains in Lisbon, Porto, and Braga. Lisbon is home to 68.7% of operations/service lines and 59.5% of Human Resources; in Porto, the corresponding values are 13.6% and 20.2% and in Braga 6.1% and 7.3%. Thus, we can conclude that the region where there was the greatest reinforcement of the presence of Contact Centers was the District of Porto, with a growth of 5% compared to the total number of Human Resources at a national level.

The representativeness of the sample of this study is enormous, since we registered responses from 1,542 operations/service lines, 30.5% more than in last year's edition. In these operations/service lines, 61,037 Employees (Agents, Supervisors and Support Staff) worked, about 58% of the total universe.

In this way, the conclusions presented in the various chapters of the present study guarantee a security of information about the universe unparalleled in similar studies.

In Contact Centers, in Portugal, the most frequent functions are Customer Service, mentioned by 88% of operations/service lines and Back office, mentioned by 79%. The least mentioned functions were Collection, with only 38%, and Studies and Surveys, with only 3%.

The sectors of economic activity most present in the sample are Health, Commerce, Banks and other Financial Institutions and Insurance Companies.

In the total responses received, 35% are from Outsourcers and 65% are from operations in Self-Management or from Outsourcers' Customers. The percentage of service positions made available by Outsourcers is 85% of the total, which is symptomatic of the importance that their operations assume in this Industry, in Portugal.

Operational Performance

Bearing in mind the figures calculated for 2022, we find the following most significant changes this year:

- The percentage of Inbound calls, compared to the aggregate total (Inbound + Outbound) increased again, from 68% to 73%.
- The Telephone channel is ubiquitous in all operations/service lines that responded to the Study – 69% of Inbound contacts and 93% of Outbound contacts occur through this channel.
- 57% of calls received by Bots are forwarded to the Operator, compared to 49% in 2022.
- The Average Inbound Service Time shows a slight increase, from 5.4 to 5.8 minutes; in the case of Outbound TMA, the evolution was in the same direction, but with less expression, from 4.1 to 4.3 minutes.
- There was a significant improvement in the time on hold, from 68" to 57".
- The Average Waiting Time, which had improved so significantly in 2022, increased again from 50" to 59".
- The First Contact Resolution indicator has maintained a regular trajectory in recent years, now standing at 84%, 1% less than in 2021 and 2022.
- There should be a significant improvement in Retention, both in Inbound calls, where it went from 52% to 65%, and in Outbound calls, growing from 32% to 37%.
- Also noteworthy is the increase in the Success Sales Rate, from 17% to 21%.

Human Resources

The Operators/Supervisor and Operators/Support Staff ratios improved significantly from 2022 to 2023, from 13.5 to 10.6 and from 14.3 to 13.5, respectively.

It has been noted that, despite the increase in the absolute number of Employees, the number of FTEs shows a reduction of 3.8%, revealing a relevant increase in part-time hours.

As for the distribution of Employees by work regime, there is a continuation of the reduction of the 100% remote dimension, which went from 30% to 27%. This reduction corresponded to an increase from 32% to 35% in the 100% face-to-face regime, with hybrid regimes maintaining the highest percentage, 38%, with a greater weight of hybrid with fixed face-to-face days.

When asked about the evolution until the end of 2024, the indication obtained is a continued reduction of 100% remote, from 27% to 25%, but without change of 100% face-to-face, absorbing that differential from hybrid regimes.

Analyzing the distribution of employees by level of education, 30.8% have completed higher education and 7.5% attend higher education. In 2022 these figures were 30% and 15%, respectively. Employees with qualifications below complete secondary education were 3.4% of the total, when in 2022 they were 5%.

In the characterization of Employees by gender, the female gender predominates both among Operators, with 66%, and among Supervisors, with 61%, in a visible evidence of gender non-discrimination.

As for the distribution by age group, the 25 to 40 age group predominates, with 53.9% among Operators and 60.7% among Supervisors. Also, the percentage of employees over 40 years of age is 31% and 31.6%, respectively.

84% of the operations carry out employee satisfaction surveys, when in 2022 they were 90%, with an annual periodicity. The percentage of satisfaction also dropped from 83% to 80% but remains quite high.

In 2023, there was a relevant correction of the remarkably high rotation, both among Operators, which went from 48.5% to 27.1%, and among Supervisors, evolving from 21% to 5%.

As for Operator absenteeism, the growth does not seem to end, reaching 9.9%, when it was 9.4%, 8.8% and 8.1%, respectively in 2022, 2021 and 2020.

A characterizing factor of our sector, Training registered a clear improvement in 2023. Initial training has increased to 21.5 days, from 20 days in 2022. Training throughout the year also has increments, from 55 to 69 hours for Operators and from 50 to 63 hours for Supervisors.

Regarding contractual regimes, non-Term contracts continue to predominate, but they have decreased from 55.1% to 50.7%.

Temporary Work reduces from 5.6% to 3.4% and Service Provision Schemes from 1.6% to 0.7%.

Policies & Benefits

In 2023, the average monthly remuneration of Operators resumed the growth trajectory, reaching €932, an increase of 4.7% compared to 2022. This growth is even more significant as we must consider the still high rotation of Operators, with successive recruitment waves of new Employees with early career salaries.

In the case of Supervisors, there was an even more significant growth, from €1,101 to €1,230 (+11.7%).

This year, we inquired, for the first time, about the average value of the food allowance paid to Employees, with an average daily value of €7.31, corresponding to about €161 per month.

About the ratios of other remuneration in relation to gross monthly remuneration, there was a new growth among Operators (from 18% to 20%), maintaining the ratio of 24% for Supervisors.

Resort to Outsourcing

The percentage of companies that hire and plan to continue hiring outsourcers remains markedly high, with 73.7%, and 23.7% of those who do not hire and do not intend to hire.

No, there was no response from non-users who intend to hire and the percentage of those who hire, but intend to stop hiring, is residual.

The most frequent services contracted to Outsourcers are Operators (96%), Supervisors (84%) and Back office (68%). The predominant compensation models are: Hourly (63%) and Per Call (50%). Due to its growing importance, the remuneration model for quality objectives already counts 29% of references.

As for the reasons for using Outsourcing, the demand for specific skills (64%), flexibility and capacity for growth (60%) and costs/flexibility of implementation (44%) stand out.

Technology

The most used technological solutions in Contact Centers are: IVR (80%), Voice and Data Recording Solutions (73%), Dialer for Outbound (71%) and Solutions for automatic SMS sending (71%). In terms of prospects, Natural IVR (34%) and Self-Care Tools for Customers (32%) stand out.

In the answer about betting on new channels, Chatbots stood out, with 40% of references and Chat (WhatsApp), with 37%.

In 2023 the percentage of calls made by Bots was only 14%, when in 2022 it was 27% and the percentage of requests resolved by Bots was 34%, when in 2022 it had been 45%.

Regarding the reasons for offering self-care service channels, 87% said it was Improving the Customer Experience, with 72% having the difficulty of integrating systems the main challenge to implement this channel.

The growth in the use of the cloud-based model does not cease, having reached, in 2023, 85%, when it was 76% in 2022. Only 13% of the responses indicated that they do not intend to evolve to the Cloud.

In 2023, the use of gamification practices and tools reached the highest value ever, with 36%, when in 2022 it was 25%.

Investment in RPA and AI also reached unprecedented levels, 58% and 50%, respectively, when in 2022 they were 55% and 43%.

We also saw growth in investment in Bots and Machine Learning, to 55.1% and 39%, respectively, compared to 2022, which were 43.7% and 36%.

Continuous Improvement

In 2023, the downward trend in the percentage of operations/service lines that conduct surveys to measure customer satisfaction persists, now standing at 56%, when in 2022 it was 62%. On the other hand, the average rating obtained in these surveys was 83%, compared to 79% in 2022.

The most used metric continues to be the Net Promoter Score (NPS), but its prevalence has dropped from 51% to 45%, while the Customer Satisfaction Score (CSAT) has increased from 33% to 40%.

In 2023, there was also a reduction in the percentage of calls evaluated by the Customer, from 32% to 29% and a decrease in the percentage of contacts subject to internal monitoring, from 18% to 8%.

The percentage of certified operations/service lines is extremely high. 82.2% obtained ISO 9001 certification and 68.9% obtained the APCC Quality Seal (45% in 2022).

It is worth mentioning the remarkably high percentage of operations/service lines that invest and intend to continue to invest in Customer Experience projects: 92%, when in 2022 it was still 83%.

Financial Data

Regarding this section of the Study, only the responses of the Outsourcers were taken into consideration.

In terms of annual turnover volume, 52.6% are in the range between 10 and 50 M€ and 31.6% are in the range above 50 M€.

As for the distribution of OPEX by the main items, Salaries and Bonuses represent 81% of the total in 2023, when in 2022 they were 84%.

The justification for this reduction in the specific weight of Salaries and Bonuses is justified by the increase in the percentage corresponding to Technology, from 4% to 6% and Hiring and Training, from 4% to 5%.

The average cost per contact increased from €2.15 to €2.24 from 2022 to 2023. The average cost per request, in turn, decreased from €3.77 to €3.08.

01



01 - CHARACTERIZATION

Figure 1

QUESTION: Is the nature of the Company Outsourcing?

COMMENT: Considering the nature of the companies that responded, 35% are Outsourcers while 65% are Client Companies or managing their own operations (N=1542).

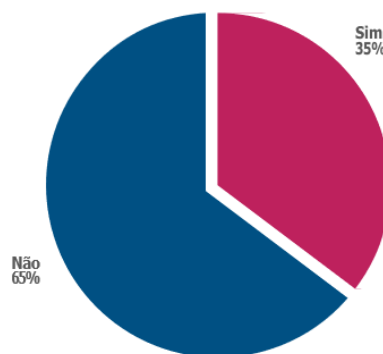


Figure 2

QUESTION: What is the number of Operations/Lines per sector of economic activity? What is the respective number of Employees?

COMMENT: The 2024 edition of the Characterization and Benchmarking Study of Contact Center Activity in Portugal, carried out on 2023 data, received 1542 operations/service lines. This number represents a significant increase of 30.5% compared to the 1182 responses verified in last year's edition. The number of Employees involved in the operations/service lines also reached a new high: 61,037, corresponding to about 60% of the universe of Employees in this Industry (N=1542).

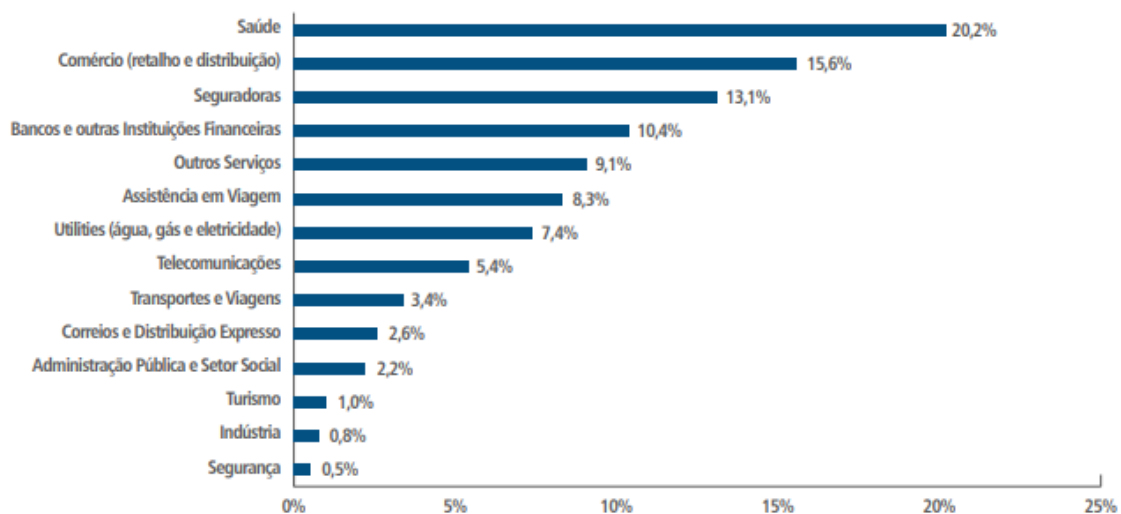


Figure 3

QUESTION: What is the number of Operations/Service Lines per district/autonomous region? And what is the respective number of Employees?

COMMENT: The Contact Center Industry asserts itself as an employer with a relevant weight in all regions of the country. In terms of the distribution of Human Resources, Lisbon (with 59.5% of Employees), Porto (with 20.2%) and Braga (with 7.3%) continue to predominate. With values above 1% of the total number of Industry Employees, we find Castelo Branco (3.3%), Guarda (1.6%), Évora (1.3%), Coimbra (1.2%) and Viseu (1.1%). It should be noted that, among the latter, only Coimbra is not an Interior District (N=1542).

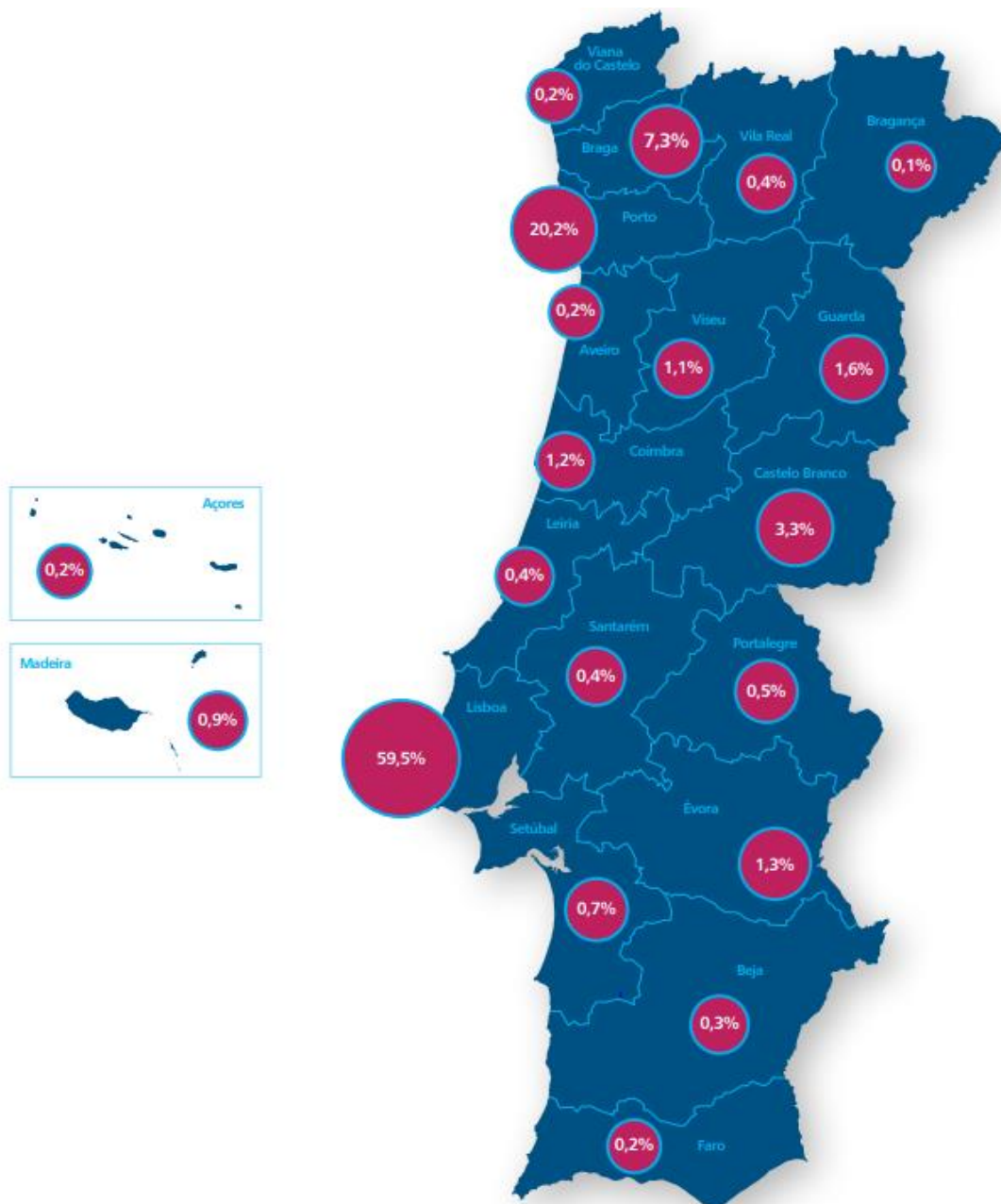


Figure 3A

QUESTION: What is the Number of Operations / Service Lines per District / Autonomous Region? And what is the Respective Number of Employees?

COMMENT: Contact Centers continue to be present in all Districts and Autonomous Regions, without exception. In terms of its distribution, Lisbon (with 68.7% of Operations), Porto (with 13.6%) and Braga (with 6.1%) continue to predominate. With values above 0.5% of the total Operations, we find Castelo Branco (2.6%), the Azores Autonomous Region (2.2%), Viseu (0.8%) and Évora (0.6%) (N=1542).

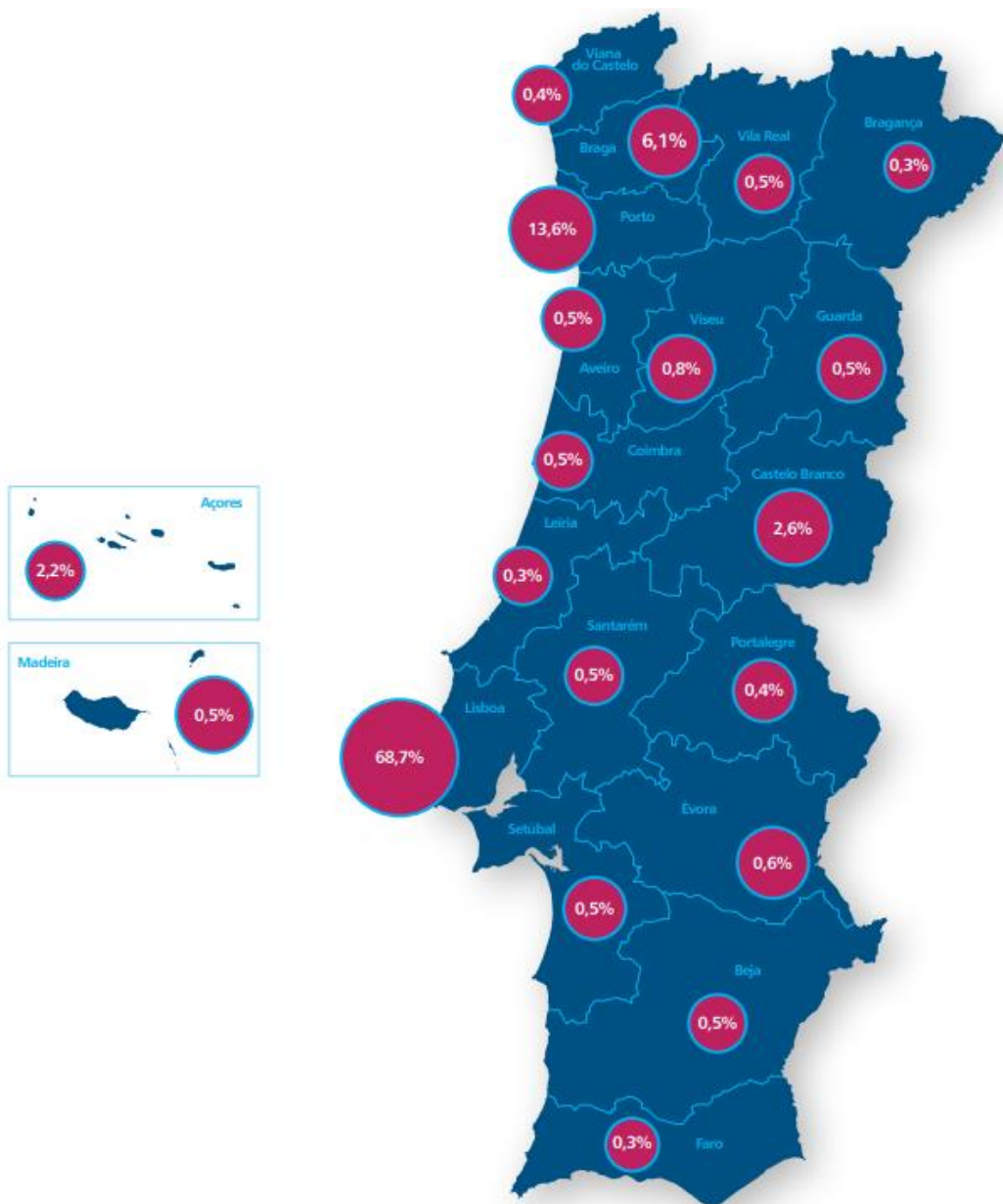


Figure 4

QUESTION: What is the Number of Operations / Service Lines per District / Autonomous Region? And what is the Respective Number of Employees?

COMMENT: In 2023 there was a very significant increase in the percentage of Human Resources allocated to Contact Centers in Porto (+5%) and Braga (+1.2%). Lisbon had an increase of 0.5% in the geographical distribution of Human Resources and Guarda and Vila Real maintained their relative weight. All the other geographical areas had small retractions in this indicator, with emphasis on Setúbal (lost 2.9%) (N=1542).

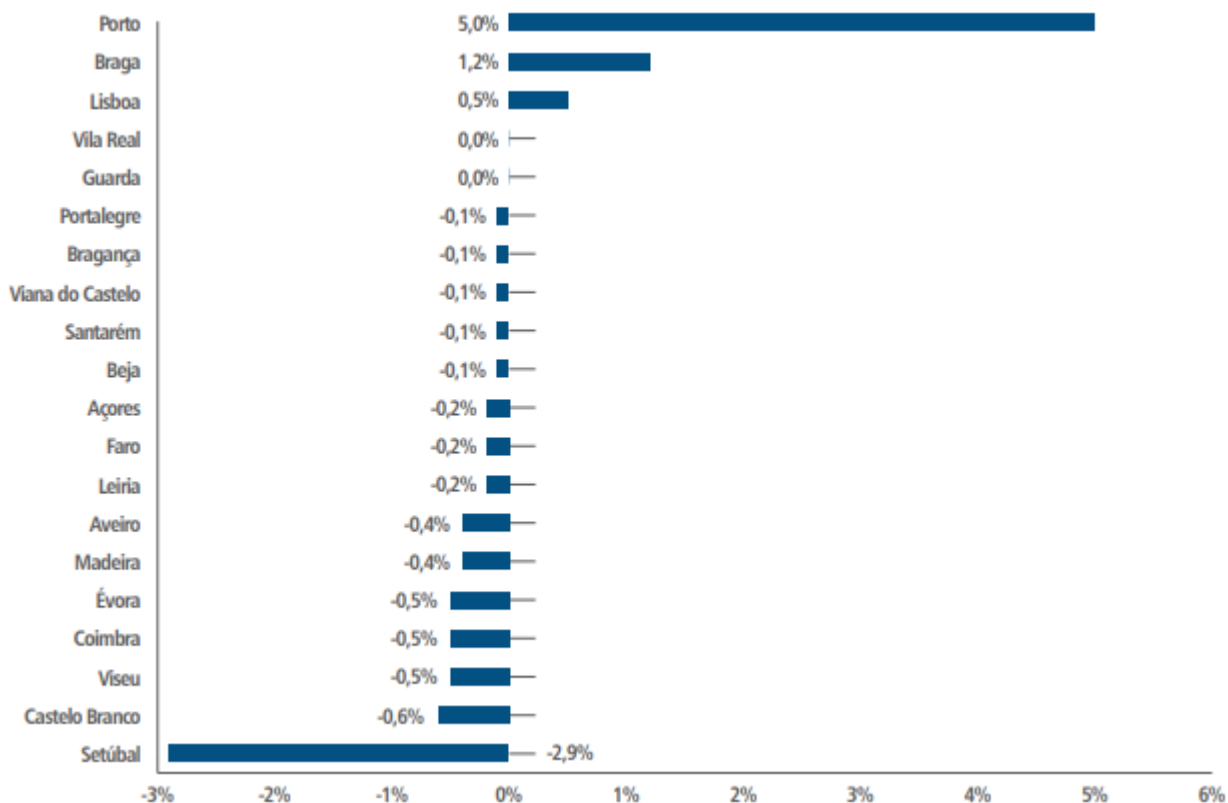


Figure 5

QUESTION: What is the Number of Contact Center Service Positions (Including Front Office and Back Office Positions)?

COMMENT: In the total number of respondent Operations/service lines, there are 41,495 service positions (PAs), 24.4% more than the 33,367 recorded in the last edition. This evolution is justified by the year-on-year increase in the number of Operations/service lines that responded, but also contradicts the fear of a contraction or stagnation that seemed to manifest itself in the evolution from 2021 to 2022. The importance and weight of Outsourcers is highlighted, with 85% of the total PAs (N=1542).

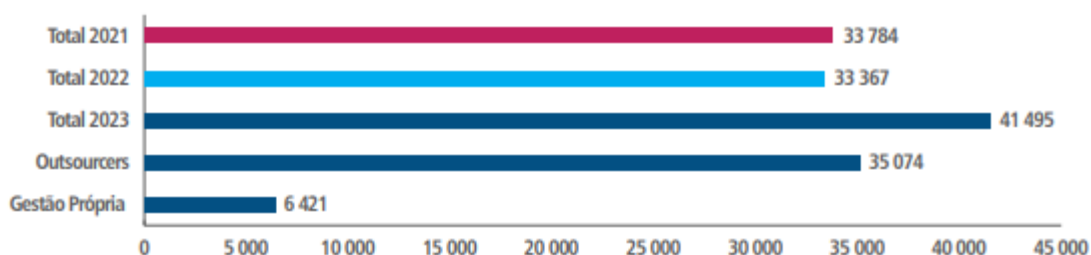
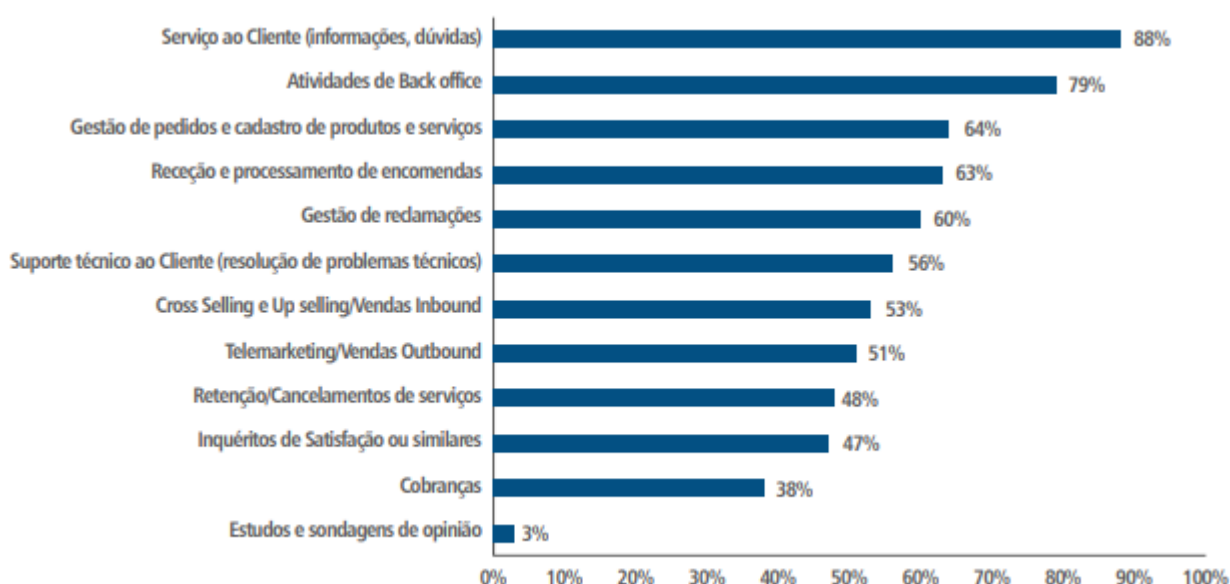


Figure 6

QUESTION: What are the main functions of Contact Centers?

COMMENT: As in last year's edition, to this question, which was multiple answers, it is no surprise that we find the most relevant functions of the Contact Center Customer Service and Back Office Activities, with 88% and 79% of responses, respectively. Also noteworthy are Order Management and Registration of Products and Services, with 64%, Order Reception and Processing, with 63% and Complaints Management with 60%. The least mentioned function was Studies and Opinion Polls, with only 3% (N=1530).





02 – OPERATIONAL PERFORMANCE

Figure 7

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

COMMENT: In the responses to the Benchmarking, Inbound activities predominate (73%) over Outbound (27%). This distribution partially corrects the reduction in Inbound seen in the 2023 edition (68%), but without reaching the value that occurred in the 2022 edition (76%) (N=1447).

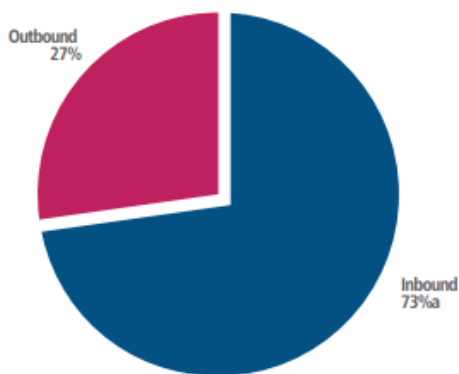


Figure 8

QUESTION: What Channels Does the Contact Center Provide to the Customer?

COMMENT: The Telephone channel maintains its ubiquity in all respondent operations/service lines, followed by E-mail, with 87%. It should be noted that there was an increase in the offer of all channels, with the obvious exception of Telephone, highlighting the growth of SMS (from 37% to 56%) and Self-service IVR (from 52% to 67%) (N=1530).

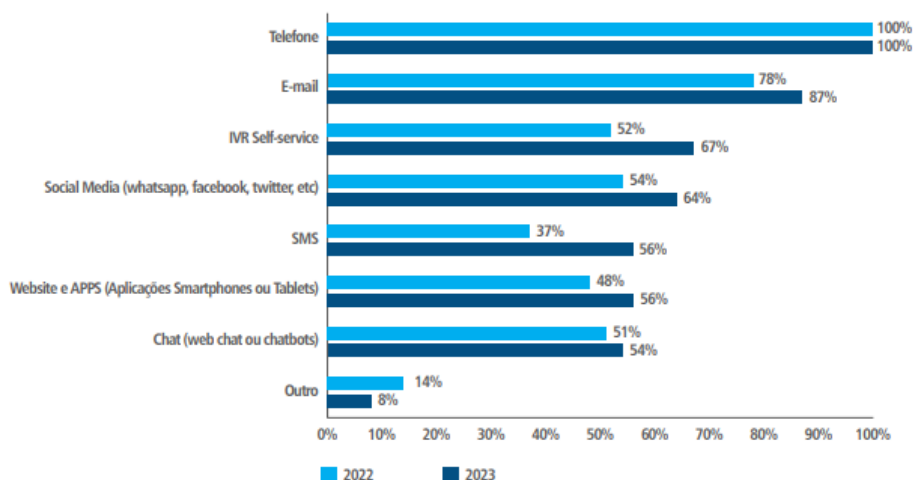


Figure 9

QUESTION: What is the Average Number of Contacts, of Inbound Nature, per Channel, per Day?

COMMENT: Although the Phone channel remains the most important, its weight decreased, from 2022 to 2023, from 73% to 69% of total Inbound contacts. The E-mail channel also dropped from 11.8% to 5.9%, as did the Self-service IVR, from 8.2% to 4.4%. On the other hand, there was a very significant growth in the weight of the Chat channel, growing from 3.8% to 16.8% of the total Inbound contacts (N=1257).

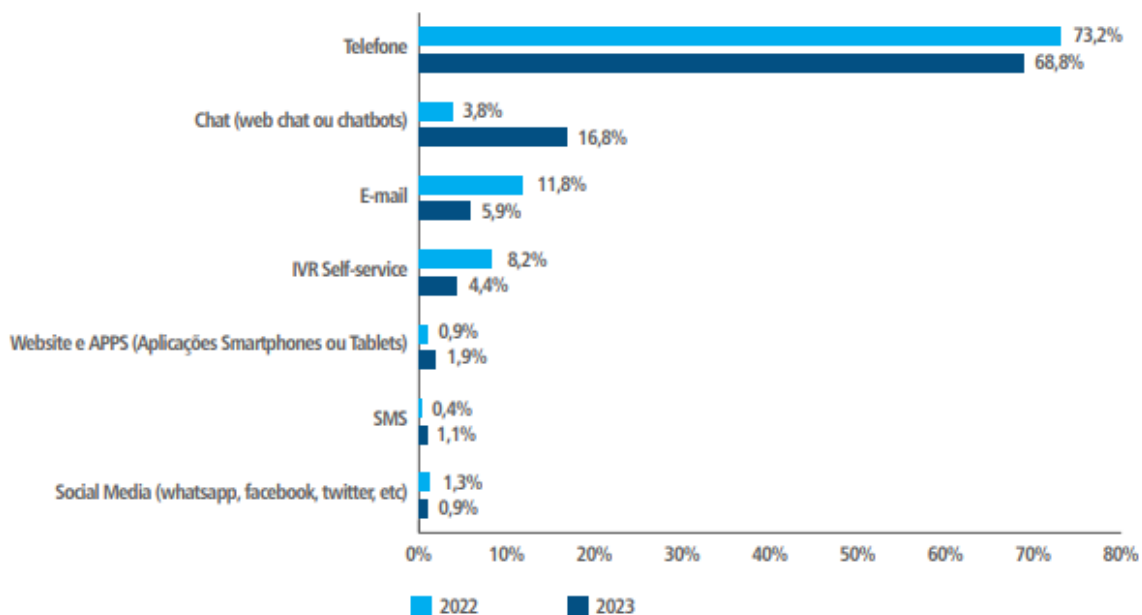


Figure 10

QUESTION: What is the Average Number of Abandoned Inbound Contacts, per Channel, per Day?

COMMENT: The Telephone channel is not the one with the highest percentage of abandonments, reaching 3.5%, less than the abandonments in the E-mail channel (3.7%) or on the Website and APPS channel (4.1%) (N=1193).

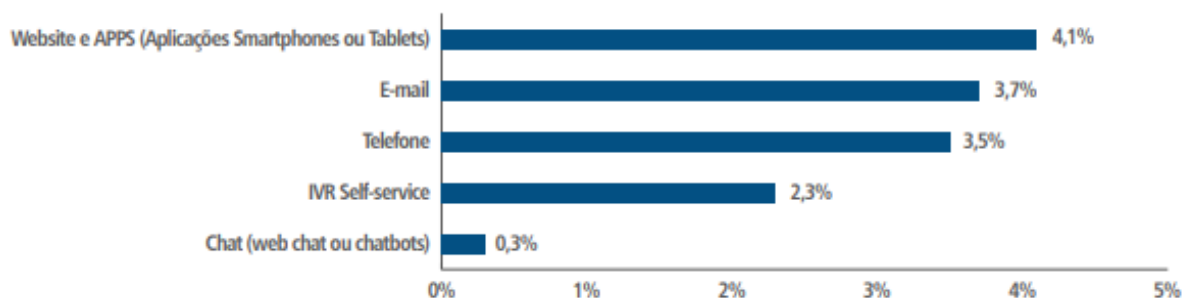


Figure 11

QUESTION: What is the Average Number of Contacts, of Inbound Nature, Served by IVR/Bot, per Day?

COMMENT: The sector that presented, in 2023, the highest percentage of IVR/Bot service was Utilities (water, gas and electricity), with 27%, and it is also the sector in which the growth compared to 2022 (it was 9%) was greater. Telecommunications (from 1% to 11%), Mail and Express Distribution (from 1% to 6%) and Insurance (from 1% to 5%) also showed remarkable growth. On the other hand, we have a reduction in Health (from 57% to 3%), in Banks and other Financial Institutions (from 13% to 9%) and in Other Services (from 19% to 6%). It is advisable to consider these developments with the reservation resulting from the large increase in responses verified in 2024 (1096) compared to the total of 2023 (215) (N=1096).

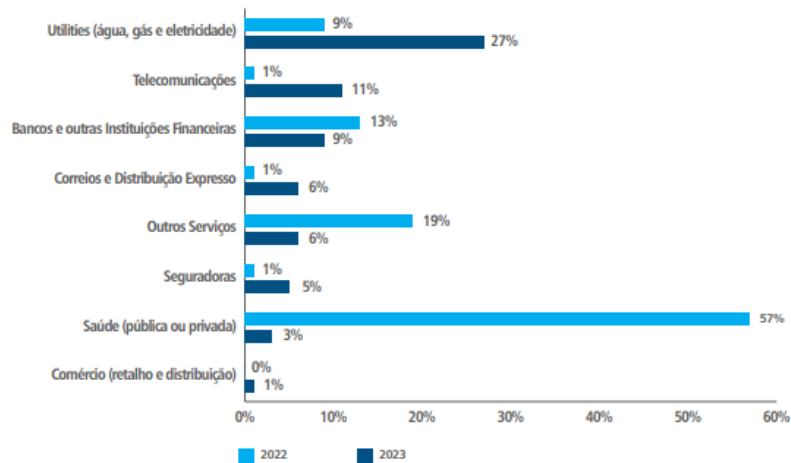


Figure 12

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

COMMENT: Overall, there was an increase in the percentage of IVR/Bot calls answered by IVR/Bot forwarded to the Operator (from 49% in 2022 to 57% in 2023). The sectors in which this increase was most visible were Commerce, in which forwarding grew from 20% to 63%, Telecommunications (from 23% to 66%), Utilities (from 34% to 57%), Insurance (from 24% to 49%), Health (from 35% to 42%) and Other Services (from 61% to 84%). On the other hand, there was a reduction in Banks and other Financial Institutions (from 61% to 49%) and Mail and Express Distribution (from 87% to 67%) (N=566).

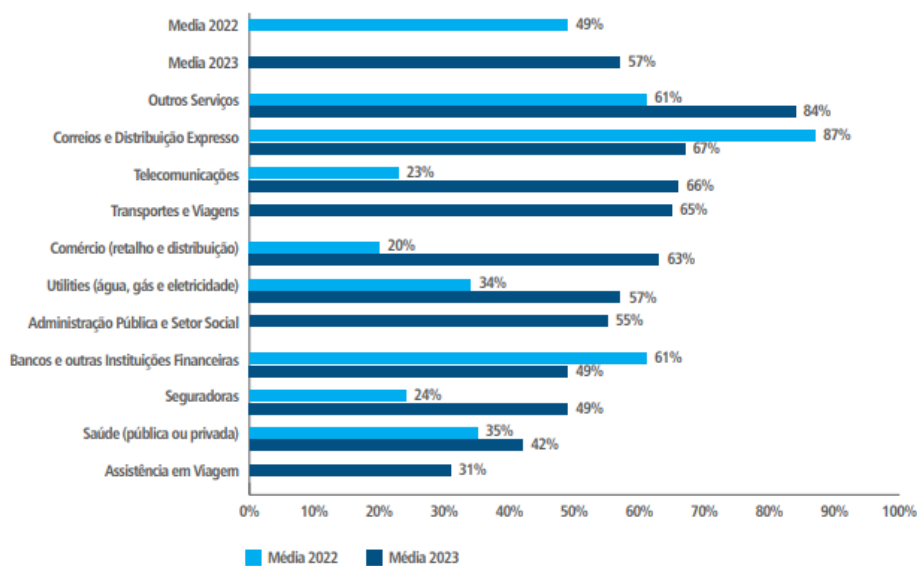


Figure 13

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

COMMENT: The distribution of outbound contacts by channel in 2023 is very similar to that seen in 2022, with very insignificant fluctuations. The "Telephone" channel continues to predominate, although it has fallen marginally from 93.7% to 92.9% (N=1123).

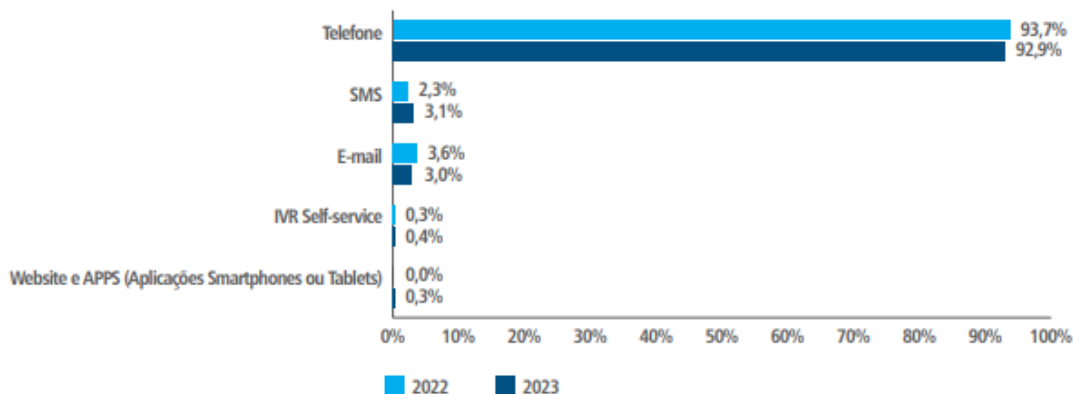


Figure 14

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

COMMENT: The average duration of calls in 2023 shows a significant worsening compared to 2022, more relevant in Inbound calls (from 5.4 to 5.8 minutes) but also seen in Outbound calls (from 4.1 to 4.3 minutes). The sectors with the highest durations in Inbound are Telecommunications (7.5 minutes), Industry and Other Services (both with 6.8 minutes). The shortest Inbound durations occur in Travel Assistance (4.5 minutes) and Commerce (5.2 minutes). On the Outbound side, Travel Assistance (3.0 minutes), Commerce (3.7 minutes) and Health (3.9 minutes) stand out. The longest durations in Outbound are in Utilities and Telecommunications (5 minutes in both) (N=1344).

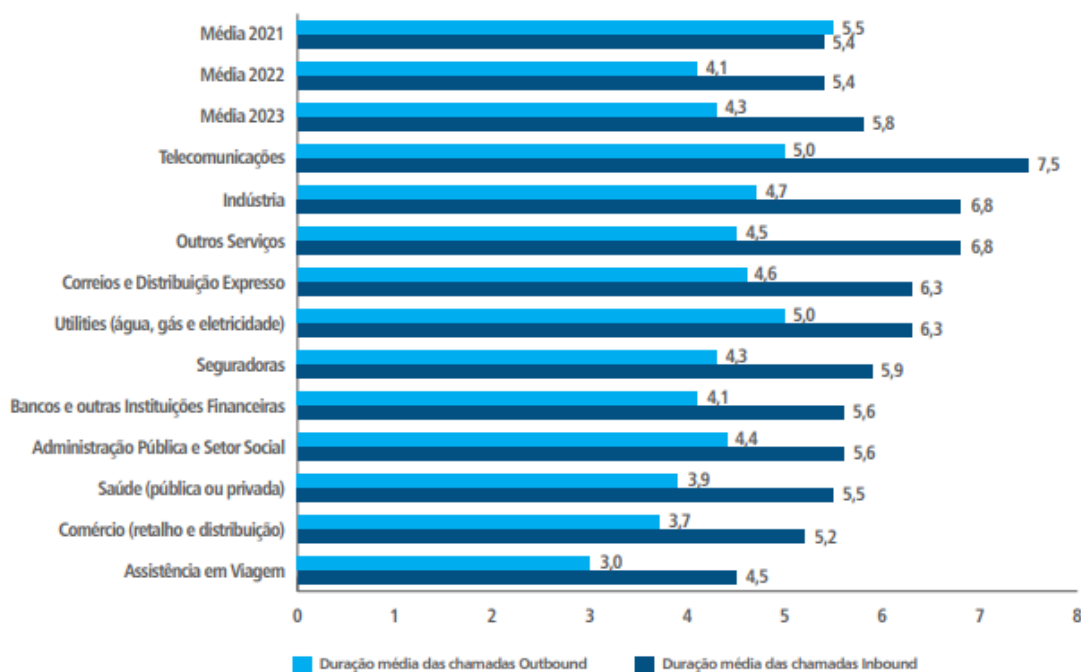


Figure 15

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

COMMENT: There has been a significant improvement in the pause time indicator, with the value dropping from 68 to 57 seconds from 2022 to 2023. The sectors with the lowest pause time were Healthcare (49 seconds), Utilities (50 seconds) and Banks and other Financial Institutions (51 seconds). The highest values occur in Telecommunications (80 seconds) and Travel Assistance (70 seconds) (N=1130).

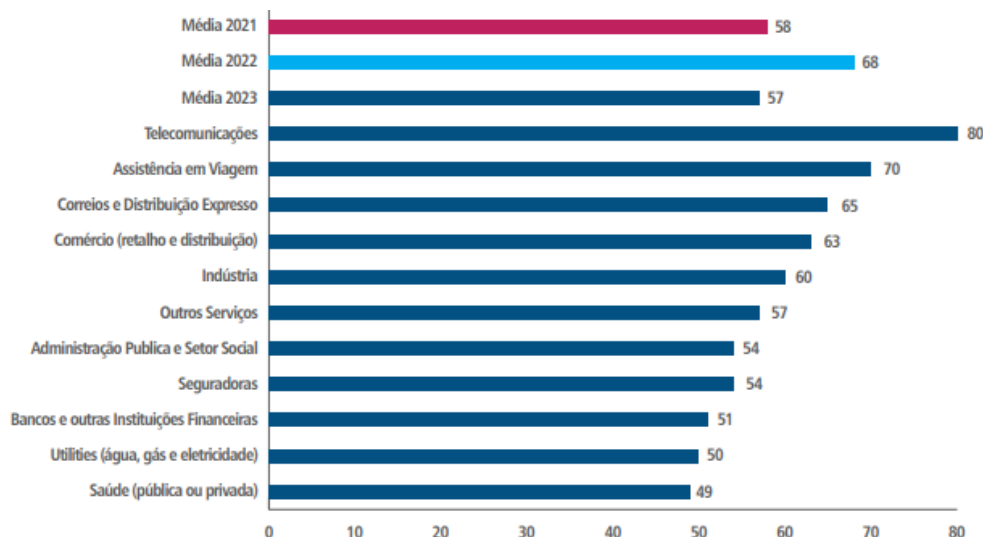


Figure 16

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

COMMENT: After the significant improvement that occurred in 2022 (from 64 seconds in 2021 to 50 seconds), this important indicator worsened again in 2023, reaching 59 seconds. We found the highest values of this indicator in Banks and other Financial Institutions (86 seconds), in Tourism and Industry (with 71 seconds in both). The best performances were ensured by Travel Assistance (35 seconds), Health and Insurance (both with 37 seconds) and in Commerce (38 seconds) (N=1094).

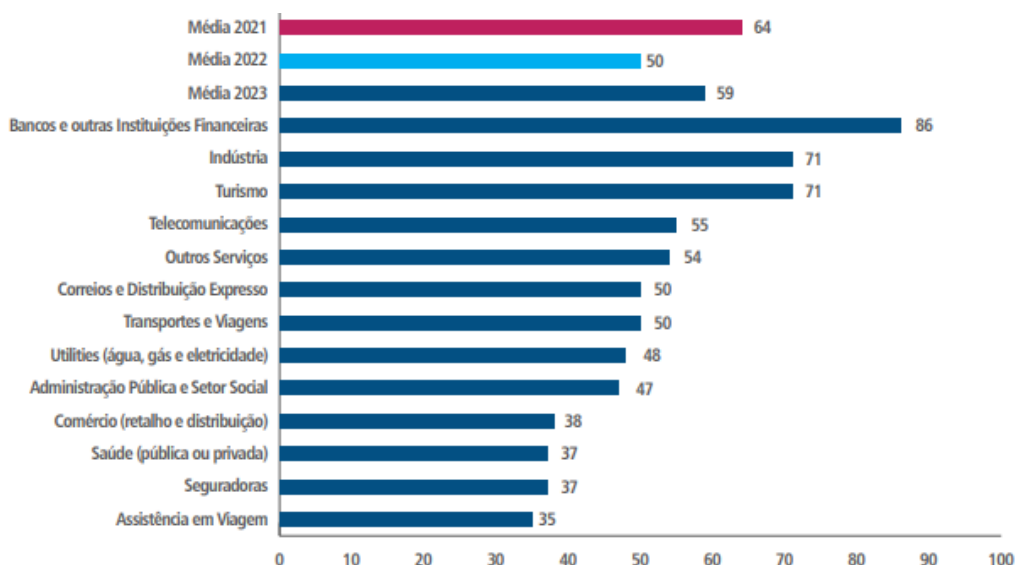


Figure 17

QUESTION: What is the (net) resolution rate at first contact?

COMMENT: This is another indicator with a marked trend towards equilibrium over the last few years. In 2023 there was a minimal decrease, from 85% recorded in 2022 and 2021 to 84%, but the current performance is above what was recorded in 2020 (83%). The best performances are found in Travel Assistance (89.7%) and Utilities (85%). At the opposite extreme are Industry and Tourism, both with 76% (N=848).

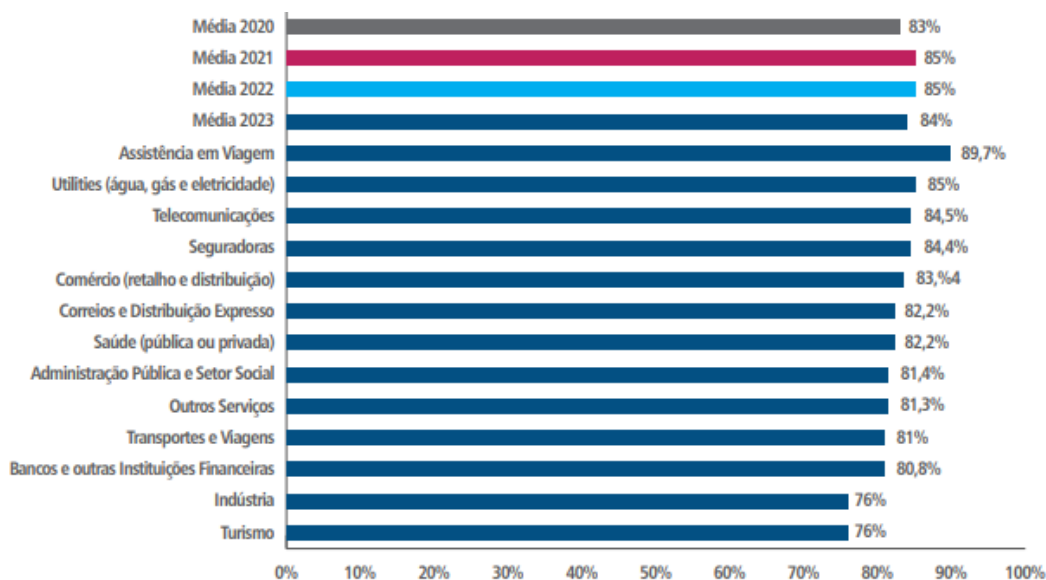


Figure 18

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

COMMENT: In very competitive markets, this indicator is particularly relevant in the context of the services provided by Contact Centers. Thus, it is worth noting the enormous growth that occurred from 2022 to 2023, going from 52% to 65%. This compares with 60% in 2020, a figure that would not be challenged in the following two years. Tourism and Industry stand out with 78%, followed by Utilities (69.1%) and Commerce (68.8%). The lowest values are those of Travel Assistance (45%), Banks and other Financial Institutions (52%) and Health (52.5%) (N=367).

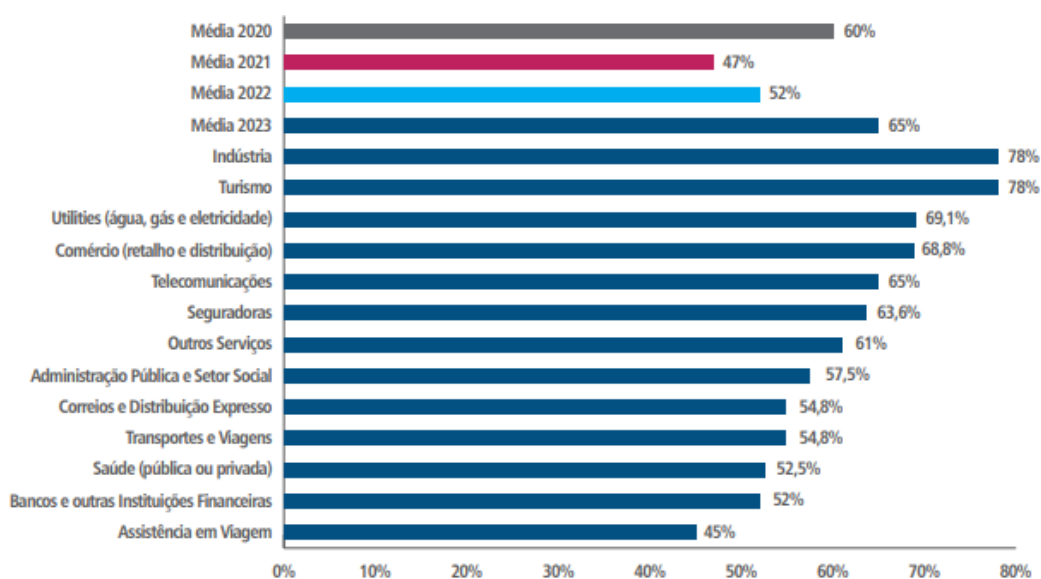


Figure 19

QUESTION: What is the success rate of Outbound Retention calls?

COMMENT: As with Inbound retention, Outbound retention also had a remarkable improvement, which amounted to 5%, reaching 37%. Tourism and Industry also stood out in this indicator, with 49%, followed by Public Administration and Social Sector (40.3%) and Utilities (40%). The least successful performances occurred in Banks and other Financial Institutions (26.6%) and Insurance Companies (27.7%) (N=371).

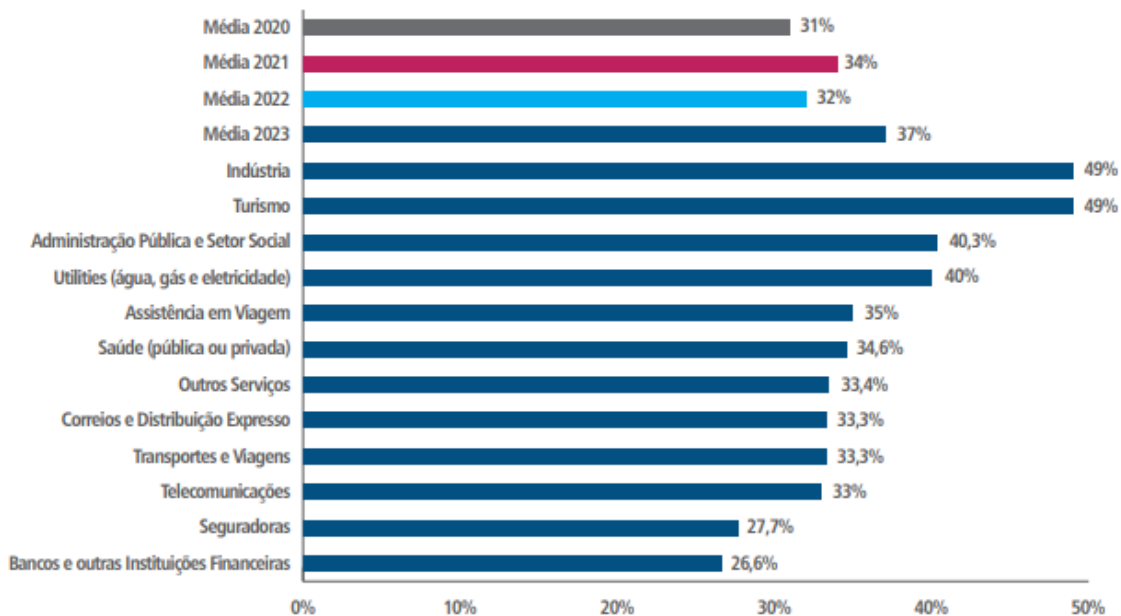


Figure 20

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

COMMENT: Another indicator that shows a significant improvement in 2023, reaching 21%. This figure, being clearly more favorable than those seen in 2022 and 2021, is still well below the 30% that occurred in 2019. The most relevant performance is, without a doubt, that of Commerce, with a remarkable 53.5%, followed by Industry (28%), Banks and other Financial Institutions (22.2%) and Insurance Companies (21.7%). The lowest values are found in Health (11.3%), Other Services (13%) and Utilities (15.3%) (N=478).

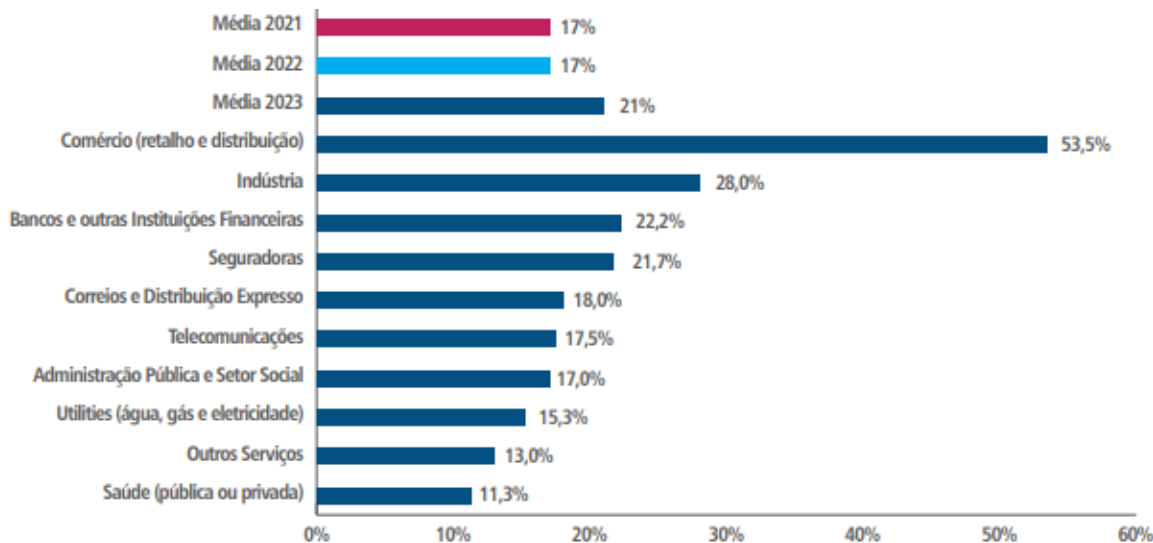


Figure 21

QUESTION: What is the average time it takes to resolve requests, excluding complaints, by channel?

COMMENT: As in the data collected in 2022, the channels with the best average request resolution time, excluding complaints, were Chat, with 1.8 hours, Social Media, with 2.7 hours, and Telephone, also with 2.7 hours. At the opposite extreme, we found the worst performances in Email (20.5 hours), Website and APPS (21.4 hours) (N=865).

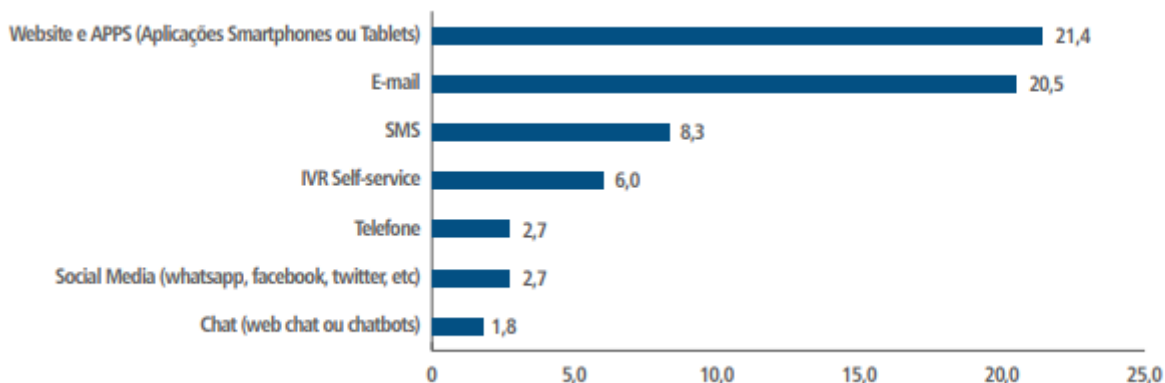


Figure 22

QUESTION: What is the average time for resolving requests, excluding complaints, by sector of activity?

COMMENT: 2023 brought a huge worsening of the average value of this indicator, going from 3.9 hours to 12.6 hours. The sectors that contributed the most to this worsening were Transports and Travel (37.3 hours), Other Services (28.4 hours) and Utilities (27.6 hours). Despite this average increase, four sectors should be highlighted for their very positive performances: Travel Assistance (0.8 hours), Telecommunications (0.9 hours), Commerce (1 hour) and Insurance (1.1 hours) (N=865).

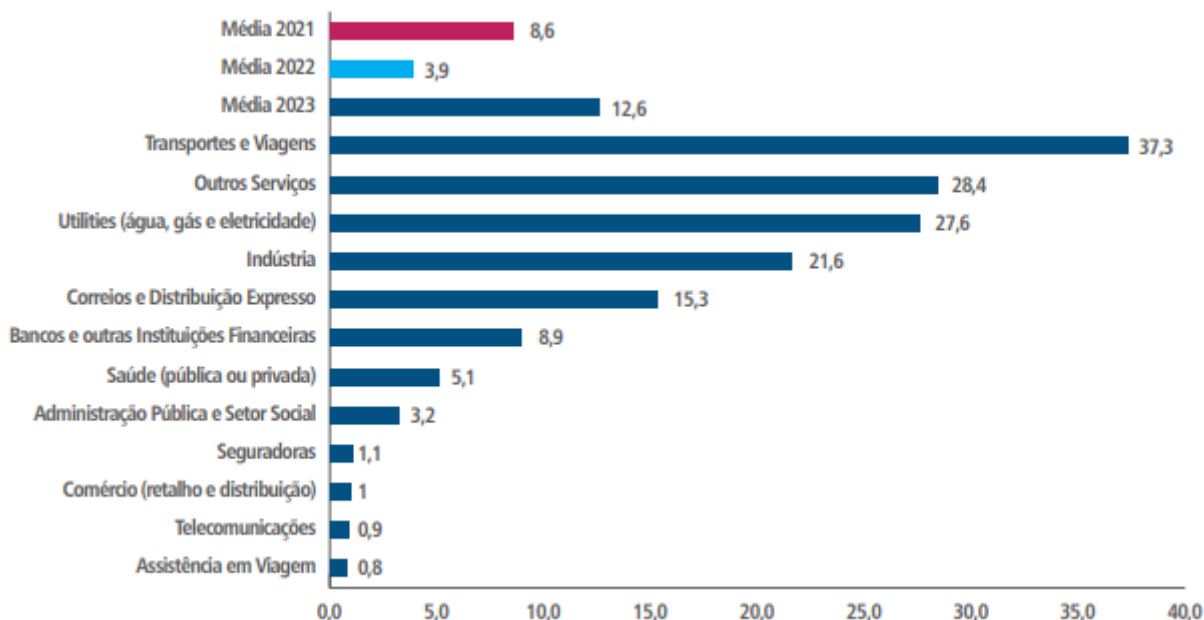


Figure 23

QUESTION: What is the average complaint resolution time per channel?

COMMENT: This is an indicator whose performance, on average, has worsened a lot compared to 2022, going from 2.3 days to 6.4 days. Email was the worst-performing channel (11.6 days), while the lowest average time was Self-service IVR (3 days) (N=727).

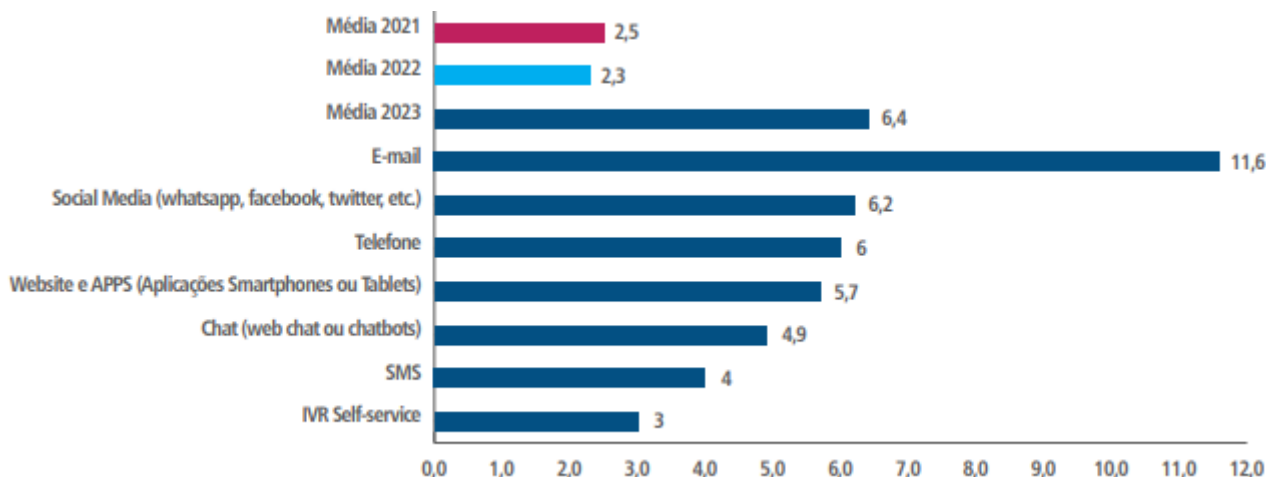


Figure 24

QUESTION: What is the average time it takes to resolve complaints, by sector of activity?

COMMENT: Given the worsening in the previous question, it will not be surprising that some sectors have performed less positively. Examples of this are Industry (21 days), Mail and Express Distribution (9.5 days) and Utilities (8.3 days). The most favorable results were those of Travel Assistance (2 days), Commerce (3.1 days) and Public Administration and Social Sector (3.2 days) (N=727).

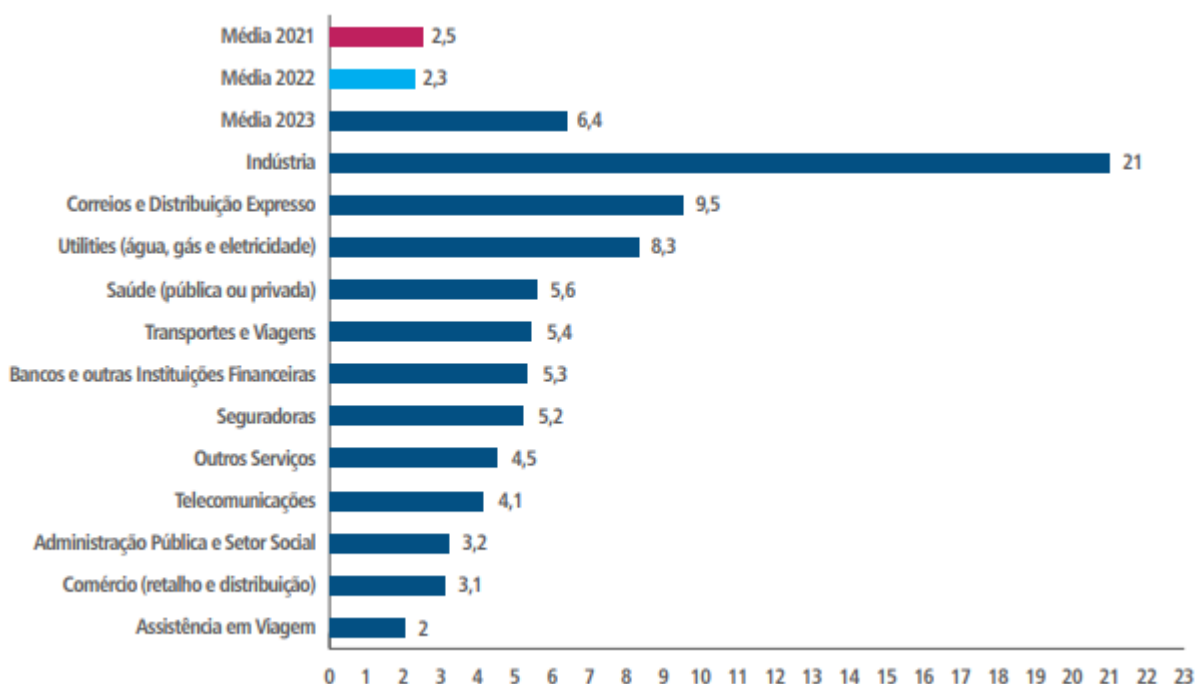
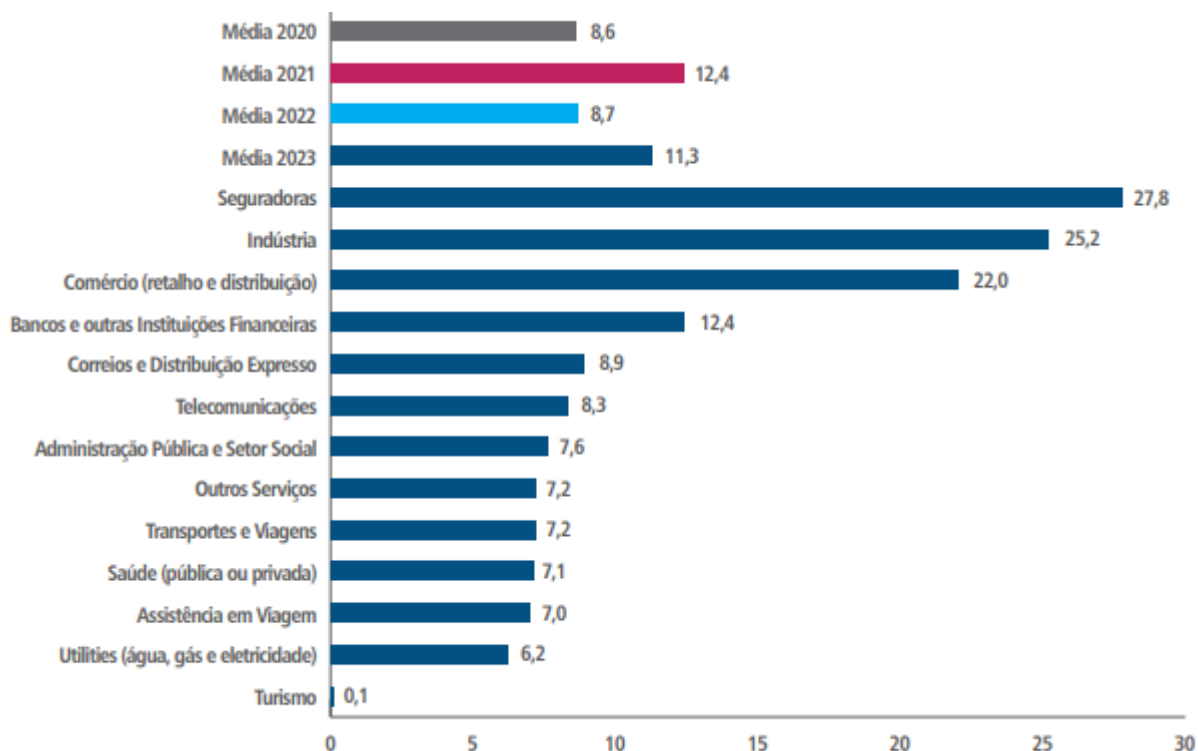


Figure 25

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

COMMENT: There was a significant improvement in the average number of written requests from 2022 to 2023, from 8.7 per Operator per hour to 11.3, although falling short of what happened in 2021 (12.4). Insurance Companies (27.8), Industry (25.2) and Commerce (22) contributed a lot to this result. Tourism (0.1) and Utilities (6.2) were the ones with less positive results (N=727).



03



03 – HUMAN RESOURCERS

Figure 26

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: In this edition of the Benchmarking Study, the total number of responding Operations/Service Line Employees was 61,037, 3.2% more than the total for 2022. Of this total number, 85.6% are Operators, 8% are Supervisors and the remaining 6.4% are Support Staff. It should be noted that this value exceeds 55% of the universe of Employees in the Contact Center Industry in Portugal, which attests to the representativeness and rigor of the data expressed in this Study. Although the number achieved is noted with satisfaction, it is still a reason to appreciate the fact that this growth of 3.2% falls short of what would be expected given the increase in the number of responding Operations/service lines (N=1542).

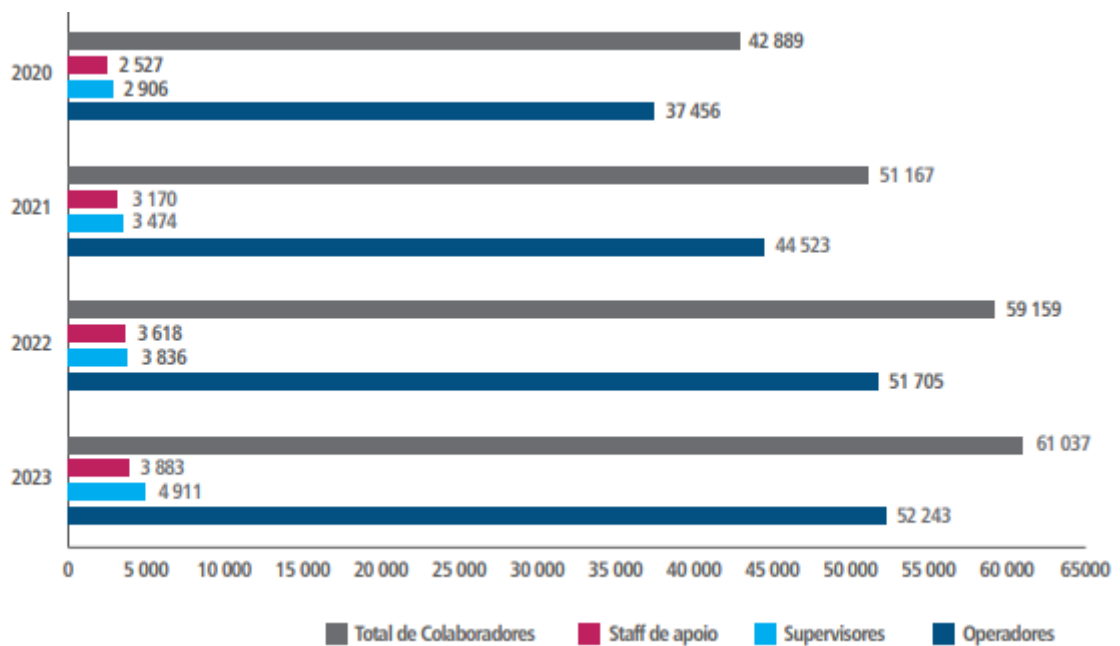


Figure 27

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 values found in the ratios of Operators per Supervisor (10.6) and Operators per Support Staff (13.5) are historically low, particularly when compared to those verified in the previous three years. Compared to 2022, the ratio of Operators to Support Staff decreased by 6.3% and the ratio of Operators to Supervisor decreased by a remarkable 21.5% (N=1542).

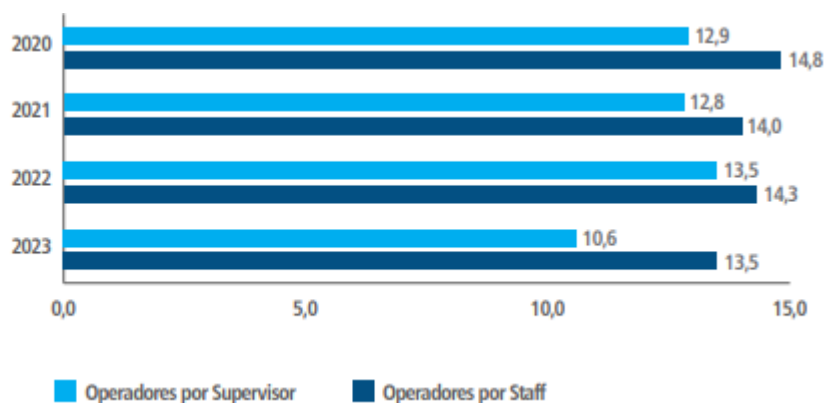


Figure 28

QUESTION: What is the average number of full-time Contact Center (FTE) employees allocated to Inbound and Outbound?

COMMENT: Despite the 3.2% increase in the number of Employees in 2023, compared to 2022, there is a decrease in FTEs of 3.9%. It should be noted that 85.5% of the FTEs are linked to Outsourcers, a percentage like that seen in the number of Collaborators (N=1422).



Figure 29

QUESTION: What is the average resource occupancy rate?

COMMENT: The average resource occupancy rate is perhaps one of the most stable indicators of our Industry since it has presented the same value (79%) in the last three years. The sectors with the highest occupancy rates are Transports and Travel (82.1%), Telecommunications and Other Services (both 80.5%), Utilities (80.2%) and Industry (80%). The lowest occupancy rates are those of Travel Assistance (68%) and Tourism (74.9%) (N=986).

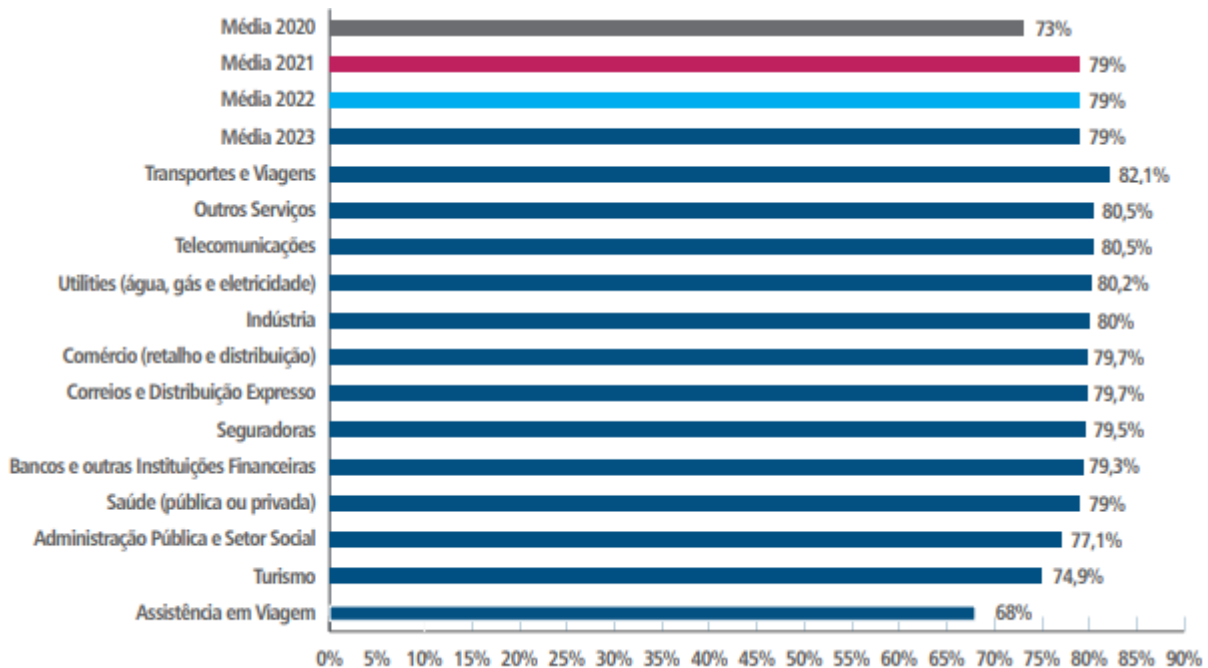


Figure 30

QUESTION: In 2023, what was the percentage of Contact Center Employees in your Organization working in these schemes?

COMMENT: The percentage of employees in 100% remote or 100% face-to-face regimes was 27% and 35%, respectively. Thus, compared to 2022, there was a reduction of 3% in the 100% remote regime and an increase of 3% in the 100% face-to-face regime. Regarding the hybrid regimes, there was only a small change, with the modality with face-to-face fixed days representing 24% of the total number of Employees, increasing by 1% to the detriment of the modality without face-to-face fixed days, which remained at 14% (N=1395).

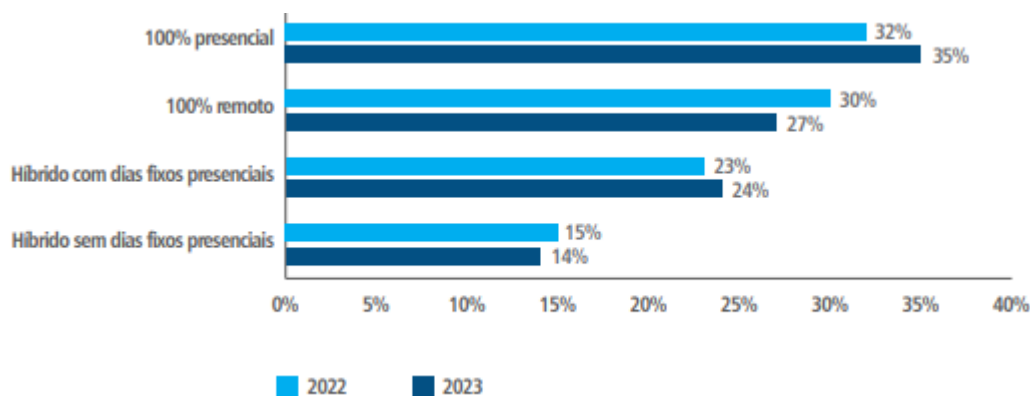
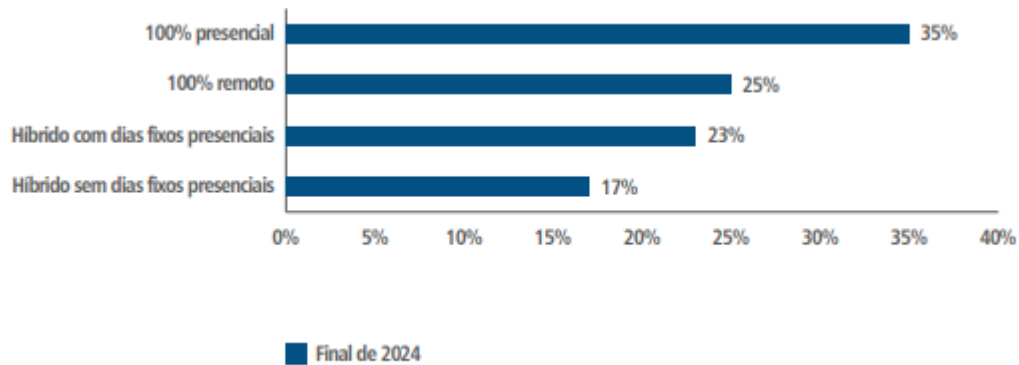


Figure 31

QUESTION: At the end of 2024, what do you think will be the percentage of Contact Center Employees in your Organization working in the following regimes?

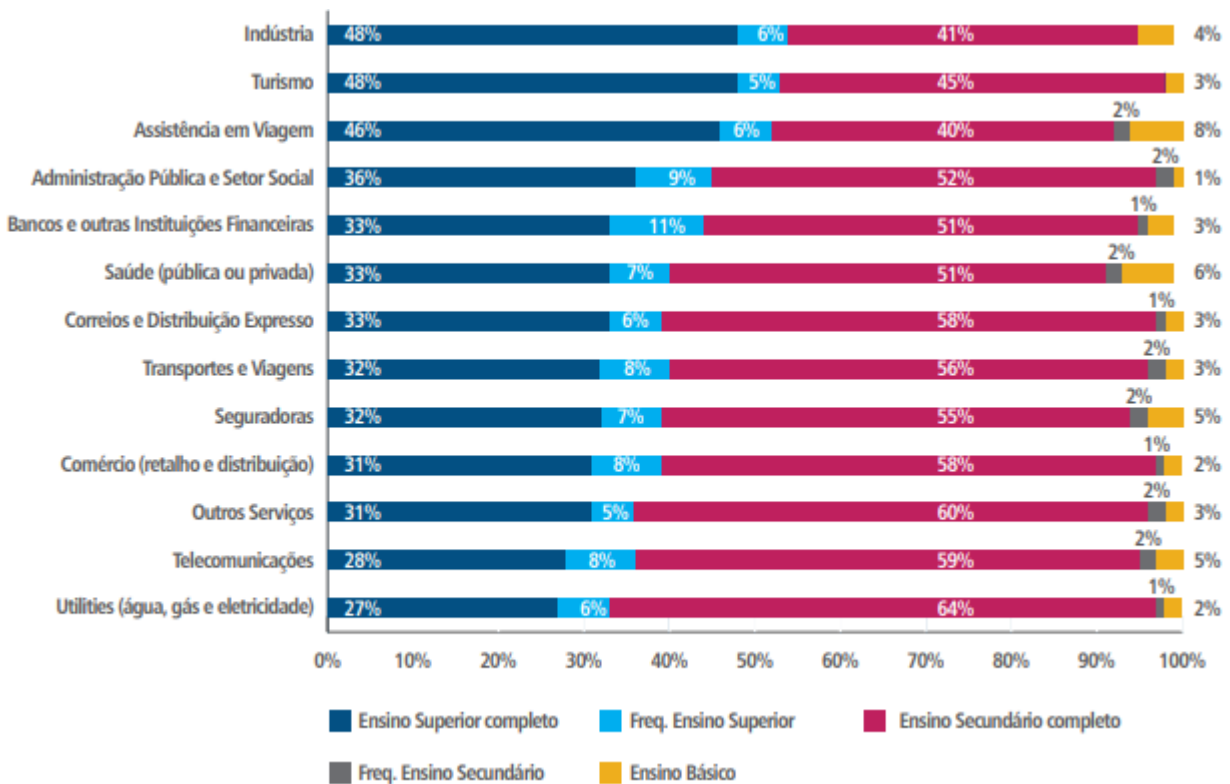
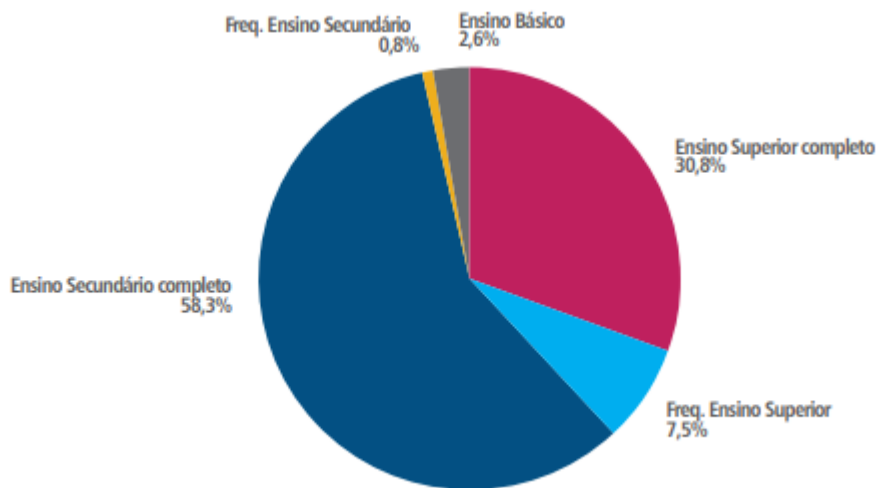
COMMENT: Bearing in mind the distribution at the end of 2023, by the four regimes, the forecasts for the end of 2024 point to a further reduction in 100% remote Employees (from 27% to 25%) and a stabilization of 100% face-to-face Employees (35%). On the hybrid side, the modality with face-to-face fixed days will decrease by 1% (from 24% to 23%) while the option without face-to-face fixed days will have an increase of 3% (from 14% to 17%). In this way, hybrid schemes grow from 38% to 40% (N=1395).



Figures 32 and 33

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

COMMENT: The most frequent educational qualifications among Contact Center Employees are complete Secondary Education (58.3%) and complete University Degree (30.8%). The remaining levels considered are, in order of magnitude, University Degree (7.5%), Basic Education (2.6%) and Secondary Education (0.8%). Compared to 2022, there was a minimal increase in the percentage of Employees with Higher Education (from 30% to 30.8%) and a relevant reduction in Employees with Higher Education attendance (from 15% to 7.5%). The most significant increase occurred in Employees with complete Secondary Education (from 50% to 58.3%). The sectors with the highest prevalence of Employees with complete Higher Education are Tourism and Industry, both with 48% and Travel Assistance, with 46%. The lowest percentages of employees with complete Higher Education are found in Utilities (27%) and Telecommunications (28%) (N=1339).



Figures 34, 35 and 36

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

COMMENT: 84% of the respondent operations/service lines indicated that they conduct employee satisfaction surveys, a lower percentage than in 2022 (90%). The most frequent periodicity continues to be annual, but its relative weight has also dropped from 58% in 2022 to the current 49%. Quarterly periodicity was reported in 19% of the cases and semiannual in 17% (N=1530). The average rating achieved in 2023 was 80%, lower than that recorded in the last three years. The sectors with the highest ranking were Public Administration and Social Sector (83%), Mail and Express Distribution (82%), Utilities (81%) and Insurance (80%). The lowest ratings were in Tourism and Industry (both at 67%) (N=650).

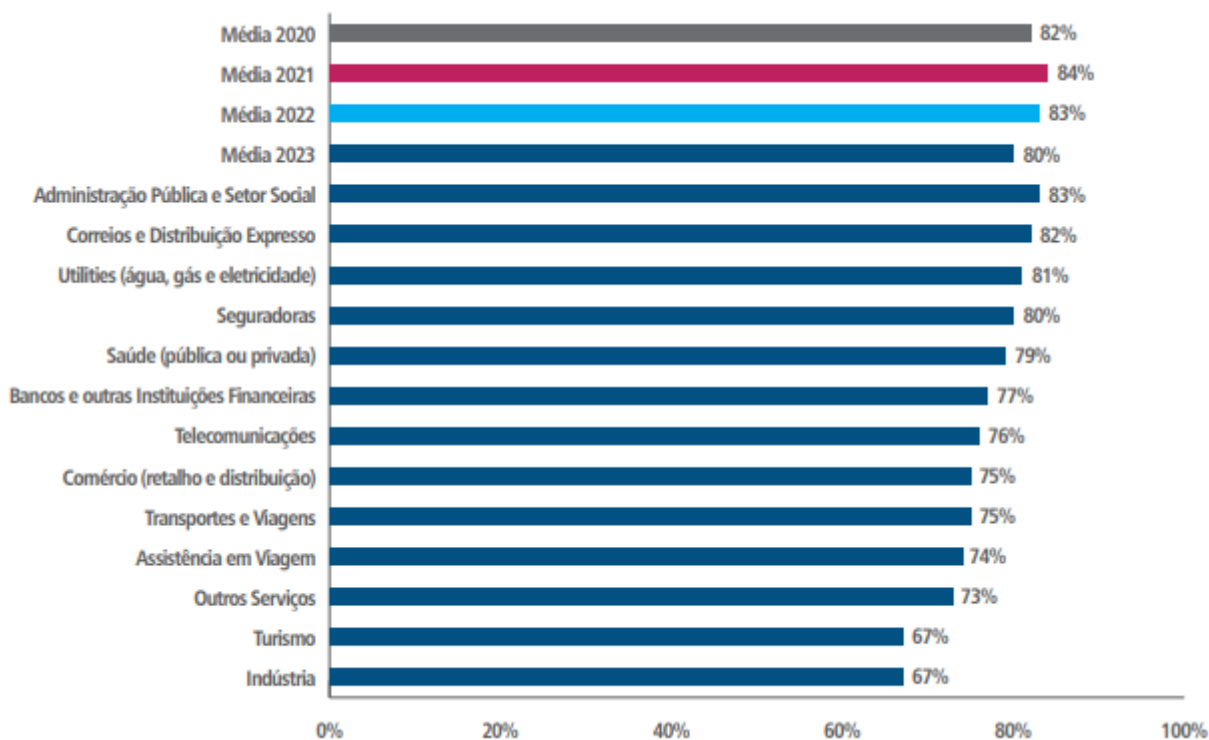
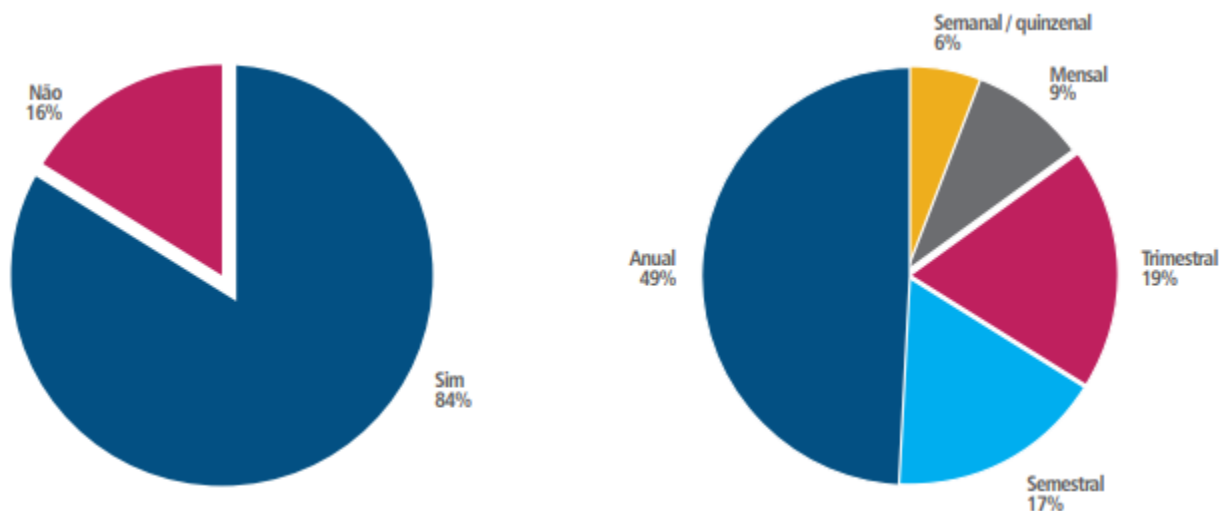


Figure 37

QUESTION: What is the absenteeism rate of Operators in 2023?

COMMENT: As has been the case since 2020, the absenteeism rate of Operators has increased again, now reaching an average value of 9.9%. The sectors in which the absenteeism of Operators is higher are Industry (29.9%) and Mail and Express Distribution (20%). The lowest absenteeism rates are found in Tourism (3.3%), Travel Assistance (6.3%) and Public Administration and Social Sector (6.6%) (N=650).

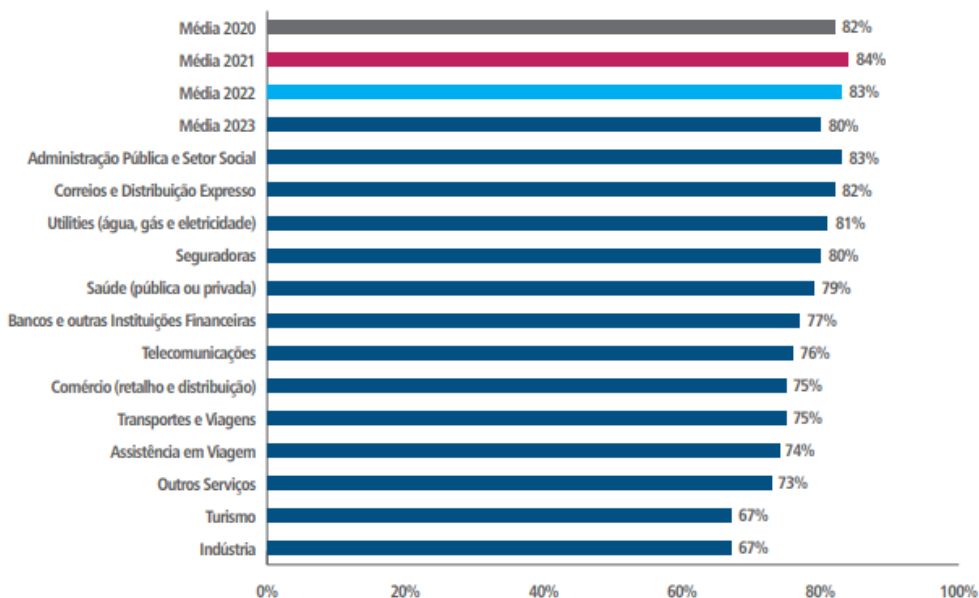


Figure 38

QUESTION: What is the rotation rate of Operators in 2023?

COMMENT: In 2023 it was possible to partially correct the very high rotation seen in 2022, changing the rate from 48.5% to 27.1%. Nevertheless, we are still well above the values of 2020 (20.2%) and 2021 (18.7%). The sectors in which this reality is most worrying are Health (30.3%) and Utilities (30.2%). The sectors that are most clearly below average are Travel Assistance (16.6%) and Industry (20.2%) (N=1401).

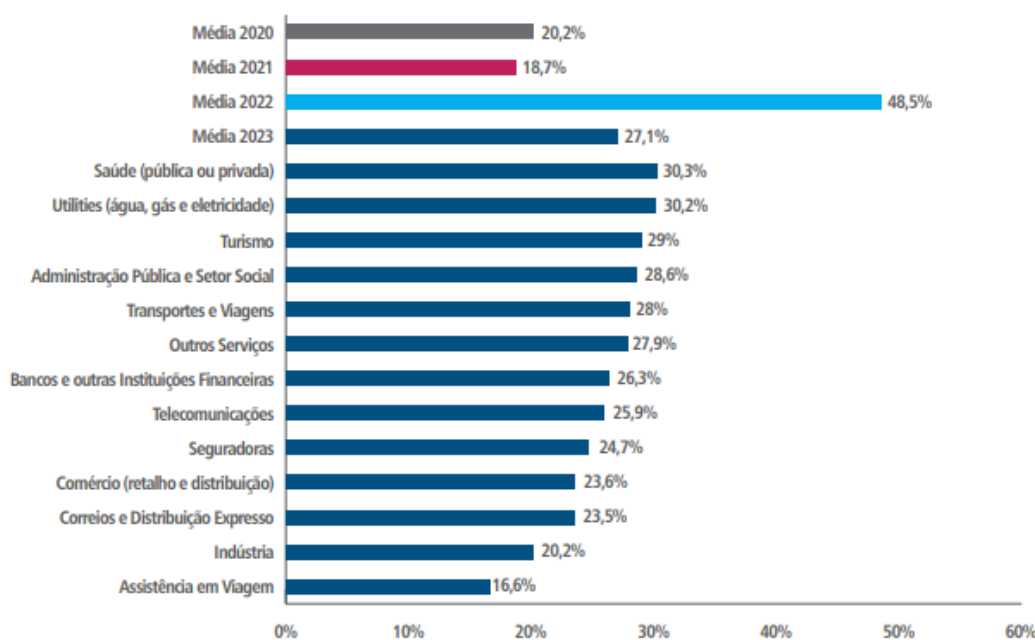


Figure 39

QUESTION: What is the average seniority of Operators?

COMMENT: After the significant reduction in the average seniority of Operators in 2022, there is a relevant increase, in line with the values that occurred in 2020 and 2021. The highest seniority was found in Travel Assistance (58.2 months) and Mail and Express Distribution (57.5 months). At the other end of the spectrum are Other Services (30.2 months) and Transports and Travel (31 months) (N=1235).

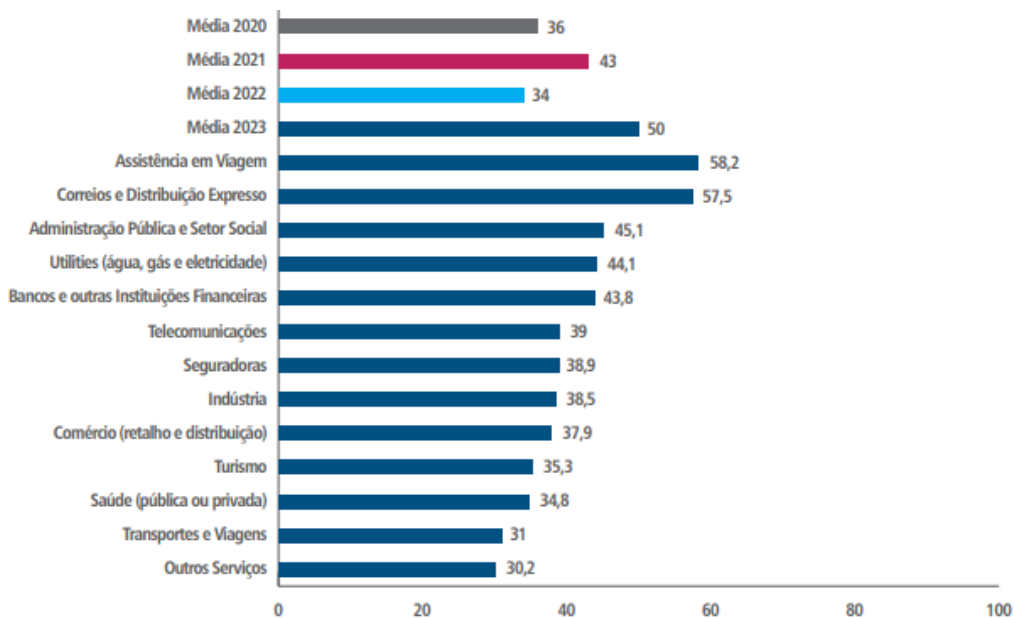


Figure 40

QUESTION: What is the rotation rate of Supervisors in 2023?

COMMENT: Although above the 2020 rate (4%), in 2023 it was possible to significantly reduce the 2022 rotation rate (21%) to 5%. Travel Assistance (0.6%), Commerce (4.1%) and Health (4.6%) contributed a lot to this reduction. In contrast to this trend, Tourism (11.7%) and Banks and other Financial Institutions (8.2%) had the highest rotations (N=1356).

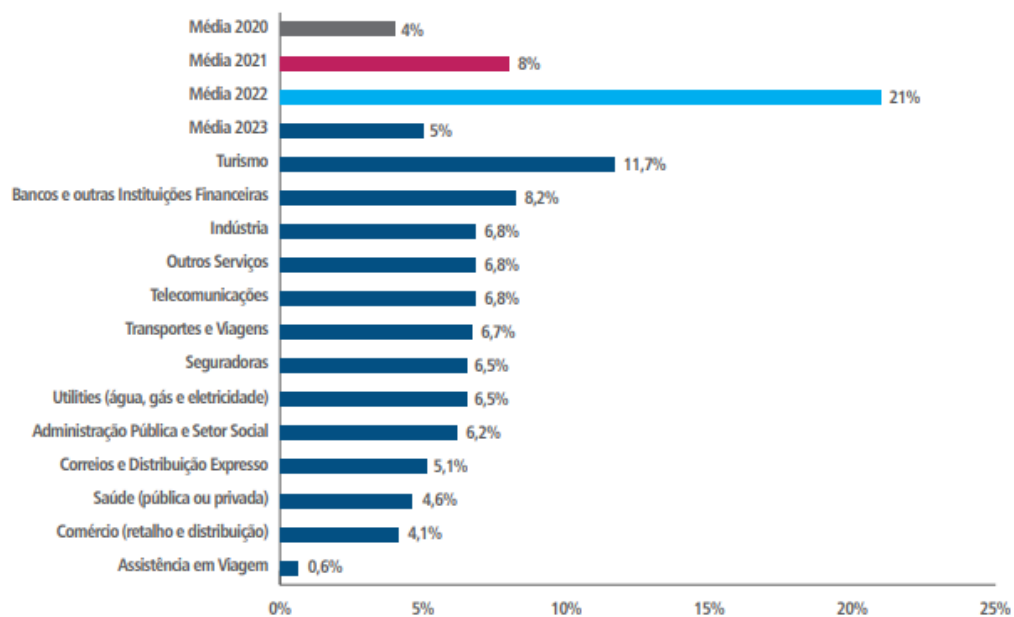


Figure 41

QUESTION: What is the average seniority of Supervisors?

COMMENT: As seen in the Operators, there was a very significant increase in the average seniority of Supervisors, compared to 2022 (from 75 to 87 months), slightly above that found in 2020 (85 months). The sectors with the highest average seniority are Mail and Express Distribution (109.6 months) and Travel Assistance (102.5 months), closely followed by Banks and other Financial Institutions (95.2 months). The lowest antiquities are found among Industry (57.5 months), Tourism (59.7 months) and Transports and Travel (60.3 months) (N=1341).

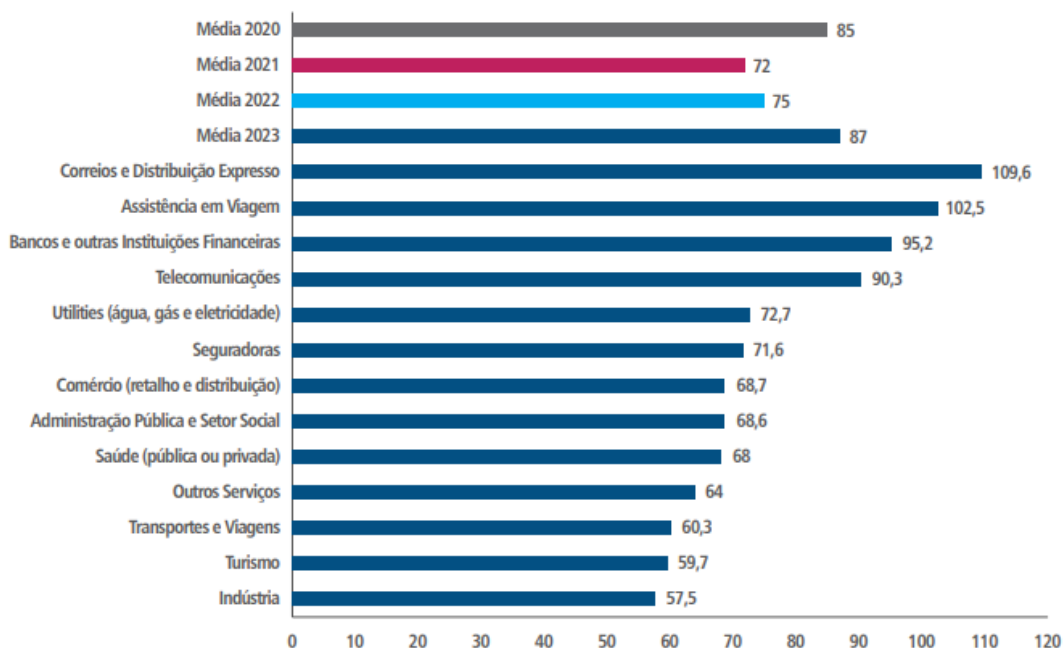


Figure 42

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

COMMENT: In 2023 there was a reduction in the percentage of Effective Contracts, from 55.1% that had occurred in 2022 to 50.7%. On the other hand, the percentage of Fixed Term Contracts rose from 36.5% to 45.2%. This evolution may be justified by the high rotation, namely of Operators. In any case, the aggregate Non-Term Fixed Contracts + Fixed Term Contracts increased from 91.6% in 2022 to 95.9% in 2023, because of the reduction in Temporary Work (from 5.6% to 3.4%) and Service Providers (from 1.6% to 0.7%) (N=1342).

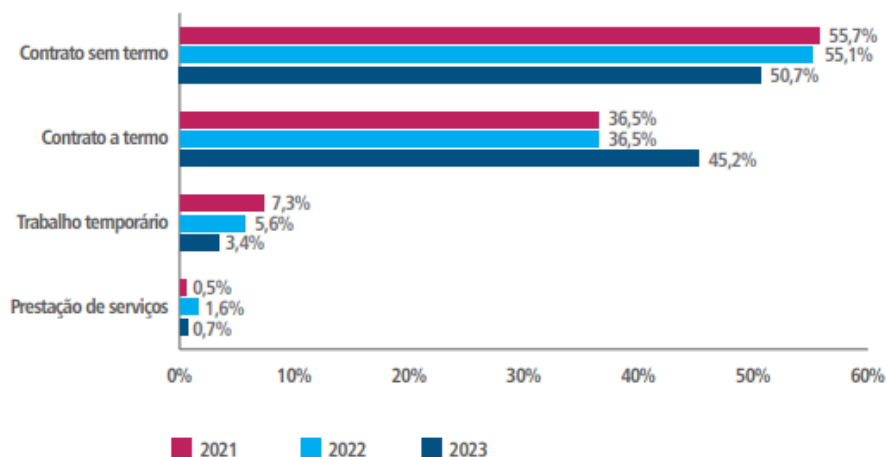


Figure 43

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

COMMENT: The percentage of Employees reallocated to other functions within the Organization maintained, in 2023, the value that was seen in 2022 (8%). The sectors where this practice is most frequent are Other Services (9.6%), Industry (9.5%), Telecommunications (8.9%) and Utilities (8.5%). On the other hand, the sectors in which this practice is not so followed are Public Administration and Social Sector (4.7%) and Travel Assistance (2.7%) (N=1248).

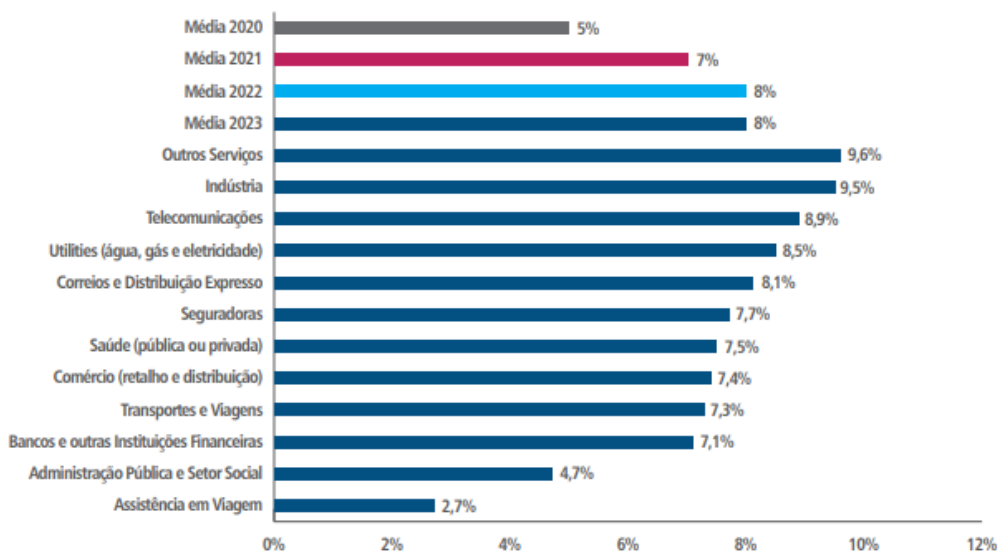


Figure 44

QUESTION: What is the average time required to train an Employee who has just been hired?

COMMENT: With 21.5 days, the year 2023 broke a worrying trend of reduction in the average initial training time of Employees, which had been observed since 2020 (24 days), 2021 (22 days), 2022 (20 days). The sectors in which this average time is highest are Industry (26 days), Commerce (23.3 days) and Telecommunications (23.1 days). The shortest average times are found in Tourism (15 days), Travel Assistance (16.7 days) and Public Administration and Social Sector (17.2 days) (N=1318).

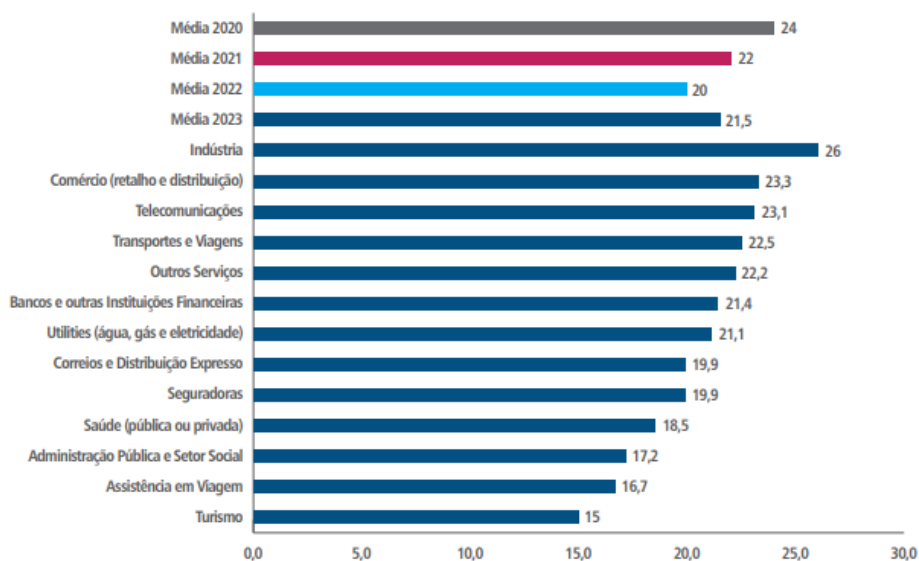


Figure 45

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

COMMENT: The average value achieved in this indicator, in 2023, of 69 hours, compares very favorably with the values of the previous three years, with a significant growth of 25% compared to the previous year. The sectors with the highest volume of annual training are Banks and other Financial Institutions (84.5 hours) and Commerce (76.8 hours). The sectors with the lowest volume are Industry (41.9 hours), Insurance (45 hours) and Health (47 hours) (N=1179).

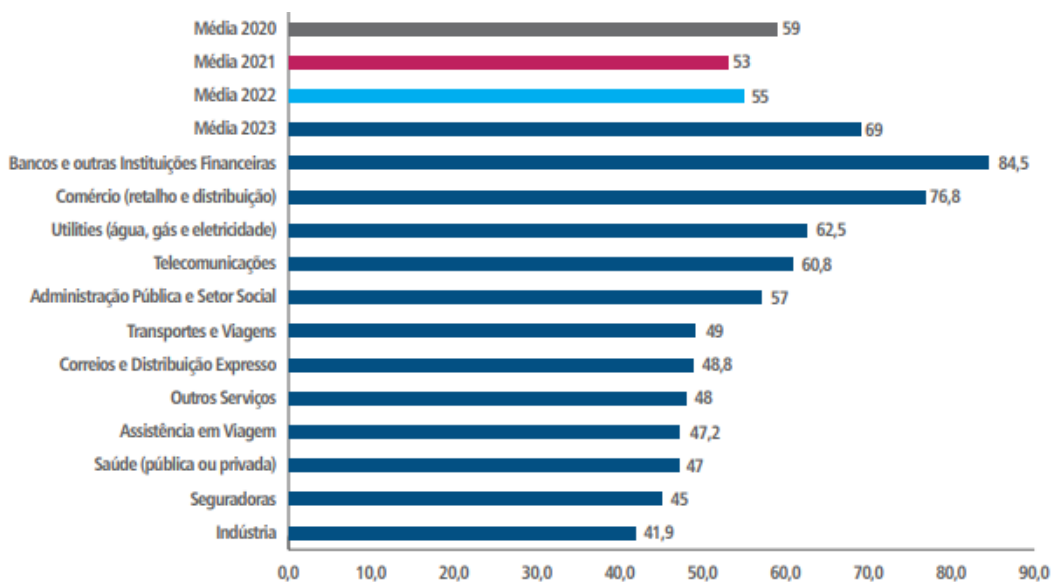


Figure 46

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

COMMENT: As with the annual training of Operators, the annual training of Supervisors also increased, in this case by 26%, compared to the value of 2022, from 50 to 63 hours. The sectors with the highest volume of annual training of Supervisors are Banks and other Financial Institutions (76 hours) and Commerce (72.2 hours). The sectors with the lowest volume are Industry (26.2 hours) and Health (36.1 hours) (N=1176).

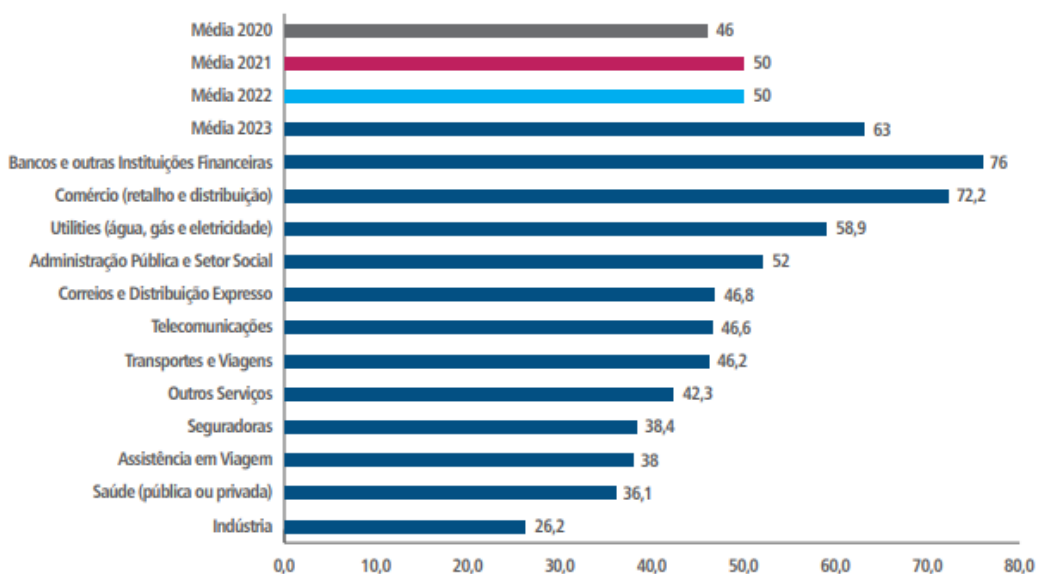
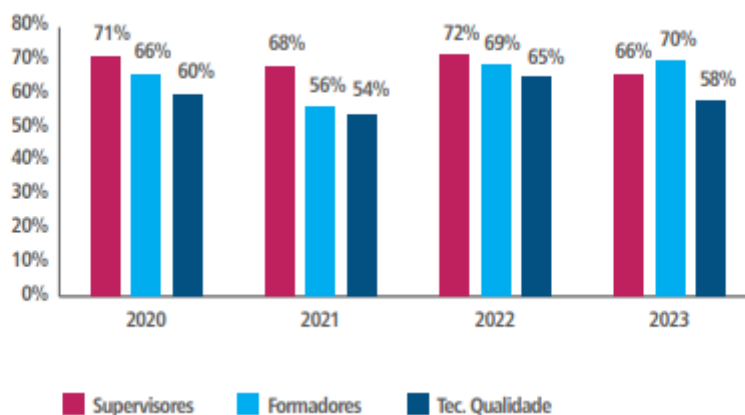


Figure 47

QUESTION: Are there specific training/accreditation plans/programs for Supervisors, Trainers and Quality Technicians?

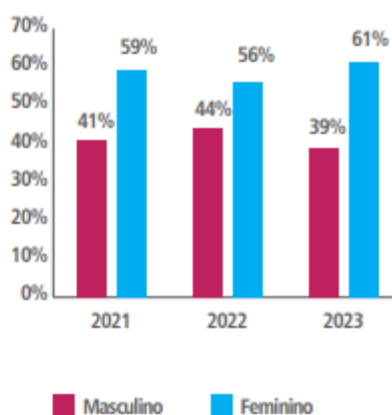
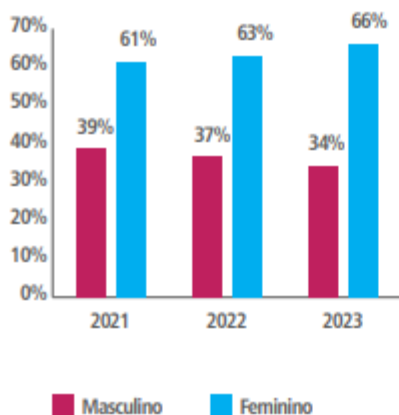
COMMENT: There are very different situations in relation to each of the professional types, with regard to the existence of training/accreditation plans/programs. In the case of Supervisors, there are in 66% of cases, the lowest value recorded in the last 4 years. In 2022 it was 72%. Also in Quality Technicians, there was a reduction from 65% in 2022 to 58% in 2023. With regard to Trainers, in 70% of cases, the highest percentage value in the last 4 years, although the growth compared to 2022 was marginal (from 69% to 70%) (N=1354).



Figures 48 and 49

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

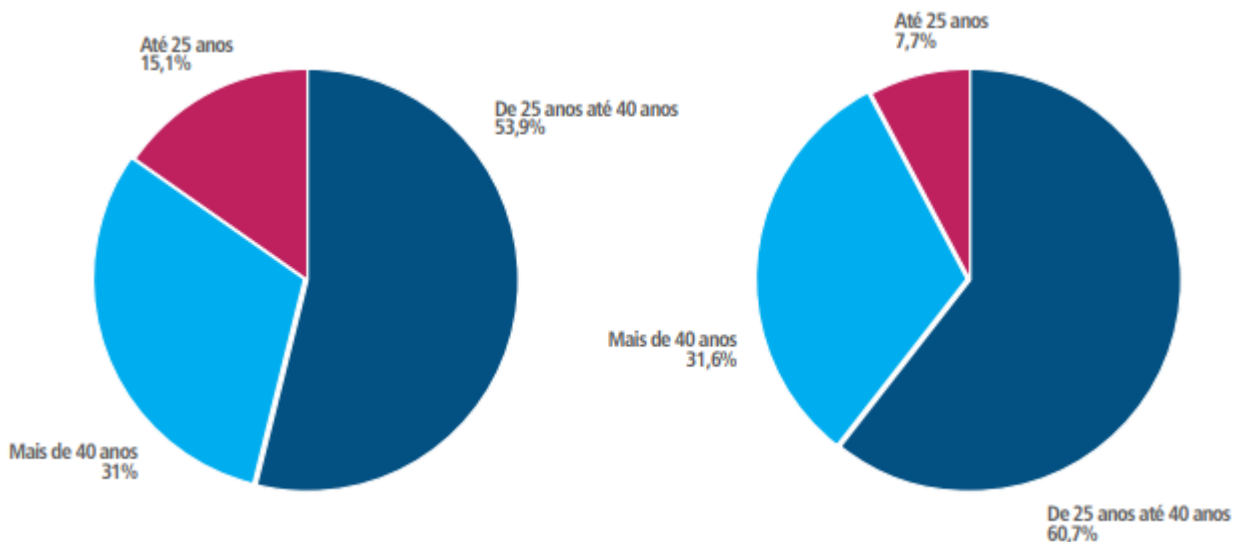
COMMENT: Both in the gender distribution of Operators and with regard to Supervisors, the female gender is predominant, with 66% among Operators and 61% among Supervisors. In both cases, there were percentage increases compared to 2022 (from 63% to 66% in Operators and from 56% to 61% in Supervisors). It should be noted that the similar predominance of women among Operators and Supervisors is proof that in this Industry there is no gender discrimination (N=1306).



Figures 50 and 51

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

COMMENT: While in the case of Supervisors, the percentage in the Up to 25 age brackets dropped only from 8% to 7.7%, in the case of Operators this reduction was much more significant, from 20% to 15.1%. The most represented age group, in both cases, is from 25 years old to 40 years old, with 53.9% in Operators and 60.7% in Supervisors. It should be noted that the percentage of Employees in the Over 40 age group (31% in Operators and 31.6% in Supervisors) is already very relevant (N=1248).



04



04 – POLICIES & BENEFITS

Figure 52

QUESTION: What is the average gross monthly salary of the Operators (does not include food, holiday, and Christmas allowances)?

COMMENT: After stabilizing, slightly downwards, in 2022, the average RBM of Operators grew again to €932 (+4.7%). The sectors with the highest RBMs are Banks and other Financial Institutions (€951) and Commerce (€942). The lowest average values are found in Tourism (€826), Mail and Express Distribution (€872) and Telecommunications (€915) (N=1346).

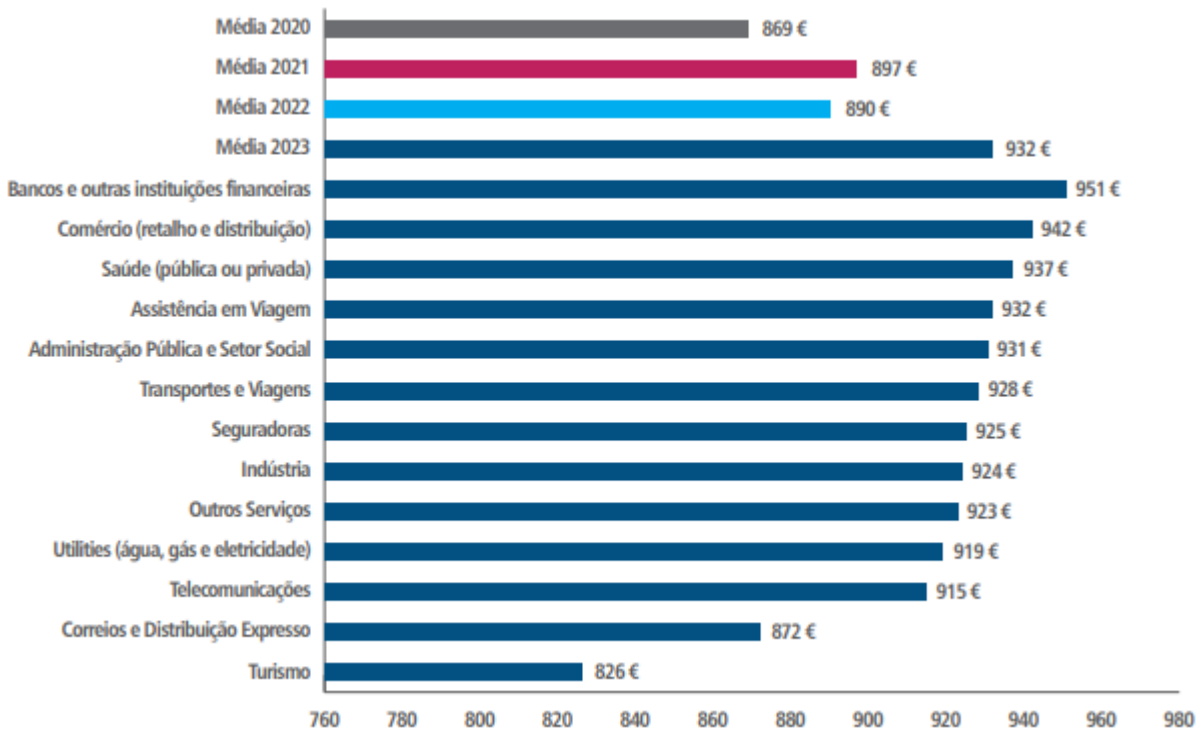


Figure 53

QUESTION: What is the average monthly gross salary of Supervisors (does not include food, holiday, and Christmas allowances)?

COMMENT: After a small correction in 2022, the RBM of Supervisors rose in 2023 to €1,230 (+11.8% than in 2022). The sectors with the highest RBM of Supervisors are Travel Assistance (€1,276) and Industry (€1,272). The lowest average values are found in Public Administration and Social Sector (€1,153), Mail and Express Distribution (€1,141) and Utilities (€1,139) (N=1345).

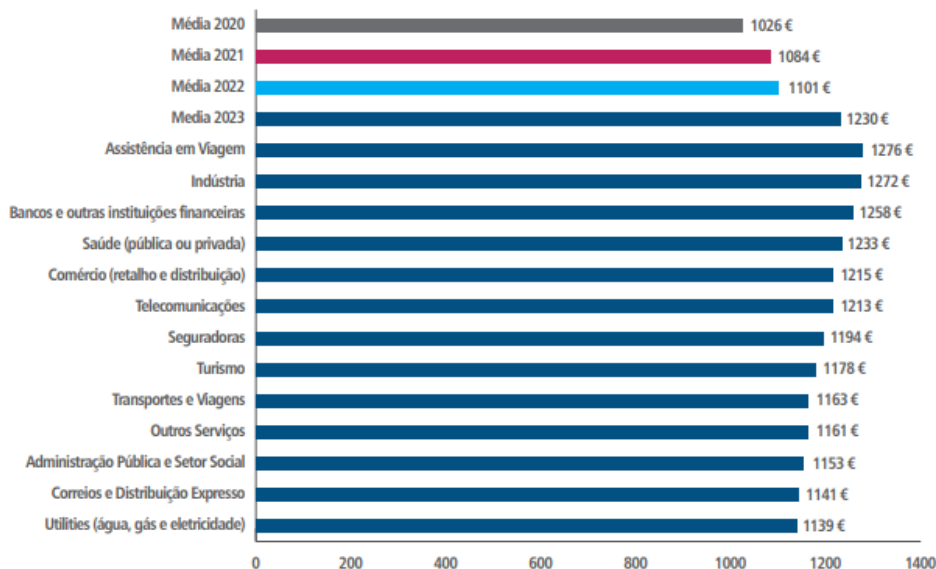


Figure 54

QUESTION: What is the average daily value of the food allowance for a full-time employee?

COMMENT: Question posed for the first time in 2023, it naturally does not allow us any consideration of its possible evolution. The analysis is important because it represents a significant monthly amount that had never been considered in our analyses. The average value, across all sectors, is €7.31. Travel Assistance (€7.91), Health (€7.48) and Banks and other Financial Institutions (€7.45) stand out. The lowest values are in Other Services (€6.38), Mail and Express Distribution (€6.74) and Public Administration and Social Sector (€6.86) (N=1076).

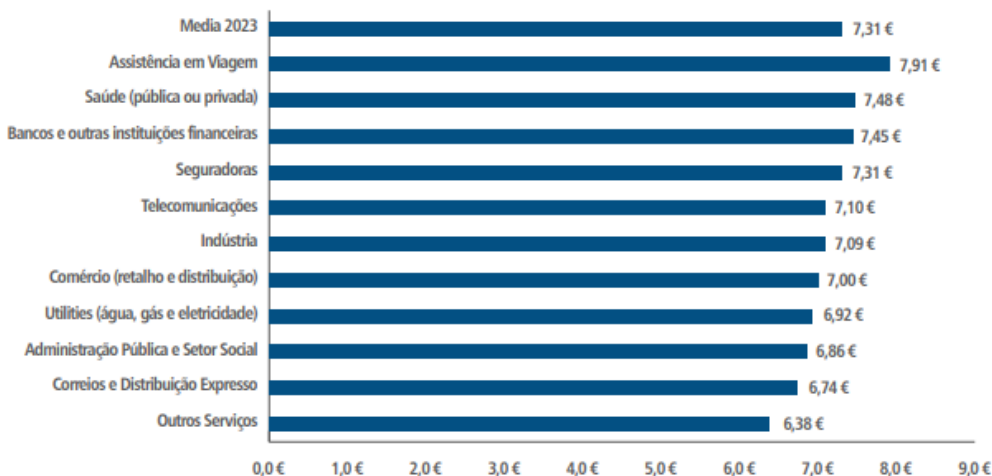


Figure 55

QUESTION: What is the ratio between other remunerations and the average gross monthly salary, per Operator / Contact Manager?

COMMENT: This ratio is 20% in 2023 (it was 18% in 2022). The most significant ratios are found in Banks and other Financial Institutions (21.2%), Telecommunications and Utilities (21% in both cases). The lowest ratios are those of Travel Assistance (13.9%), Public Administration and Social Sector (15.4%) and Commerce (15.6%) (N=1326).

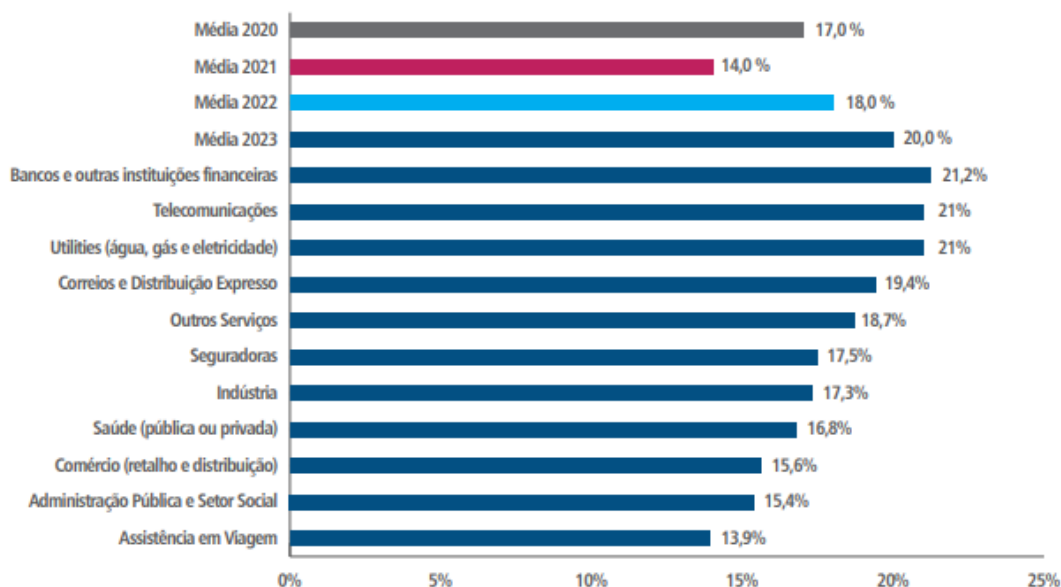
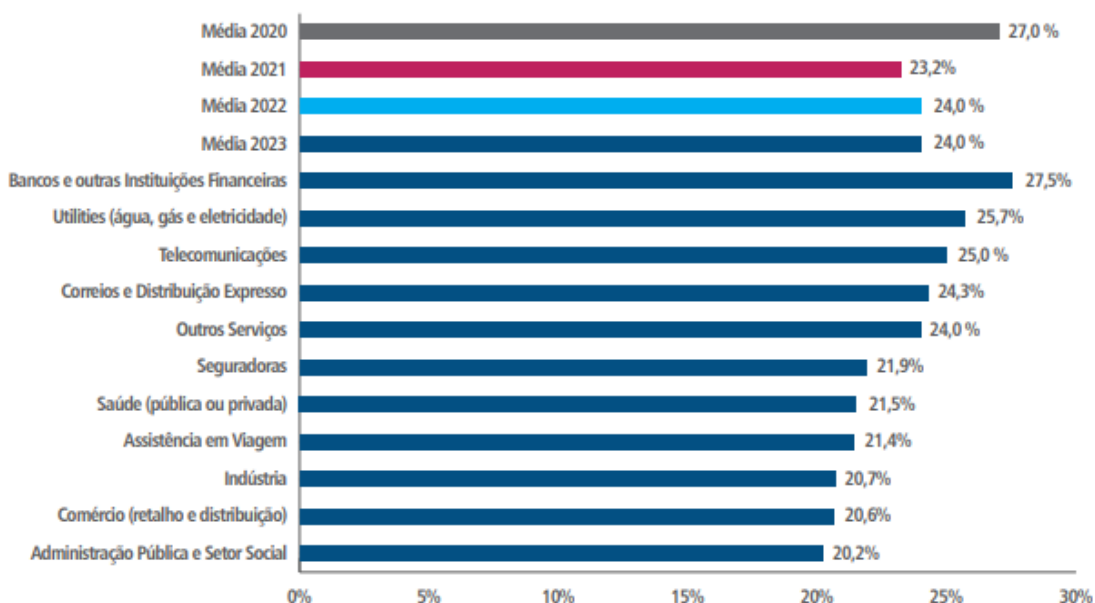


Figure 56

QUESTION: What is the ratio of other remunerations to the average gross monthly salary per Supervisor?

COMMENT: As was the case in 2022, this ratio is 24% in 2023. The most significant ratios are found in Banks and other Financial Institutions (27.5%), Utilities (25.7%) and Telecommunications (25%). The lowest ratios are those of Public Administration and Social Sector (20.2%), Commerce (20.6%) and Industry (20.7%) (N=1253).





05 – RESORT TO OUTSOURCING

Figure 57

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

COMMENT: For 2022, there is a stable situation in the decisions to resort to Outsourcing. Still, it should be noted that the percentage of those who say they hire and will continue to hire increased from 69% to 73.7%. There were no statements that they do not hire, but will hire, and the percentage of those who say they do not hire and will not hire (from 24% to 23.7%) decreased marginally (from 24% to 23.7%) (it should be noted, however, that this percentage was, in 2020, 30%). The percentage of those who say they will hire but will stop hiring is also stable (from 2% to 2.6%) (N=680).

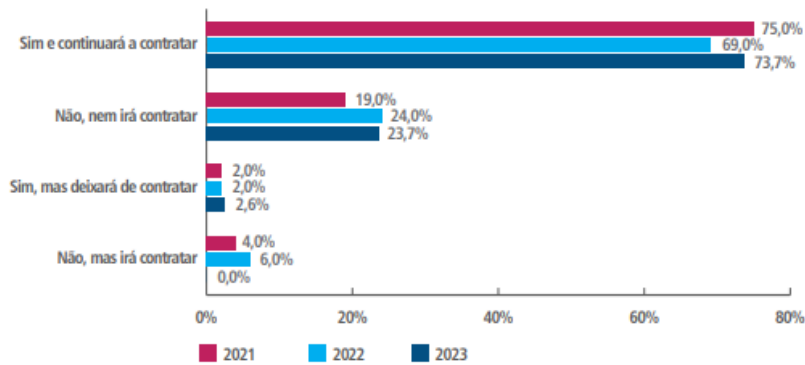


Figure 58

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

COMMENT: As this is a multiple-answer question, it was found that the number of references to all the reasons listed increased. The most frequent are Specific skills required, with 64%, followed by Flexibility and capacity for growth, with 60%. The least quoted reasons are Focus on the core business, at 32%, Cost Reduction and Improving the Customer Experience, both at 40% (N=449).

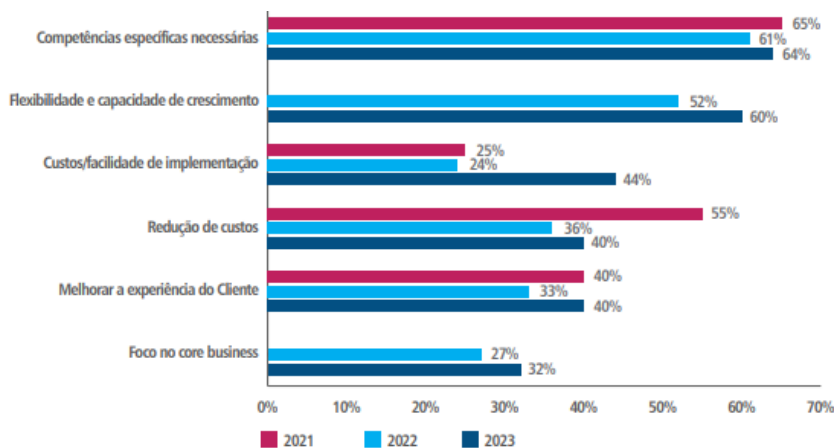


Figure 59

QUESTION: What services are contracted in the Outsourcing model?

COMMENT: Unsurprisingly, the hierarchy of contracted services remains, with 96% for Operators/Contact Managers, 84% for Supervisors, 68% for Back office or administrative tasks. The least contracted service is Technology (36%) (N=448).

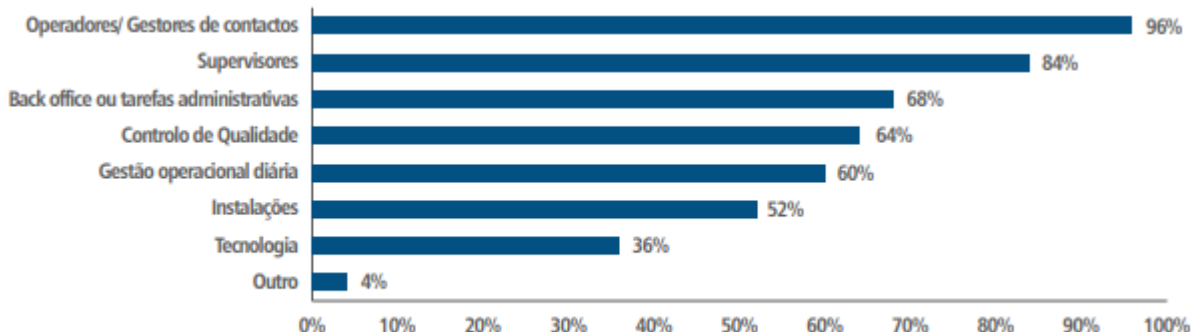
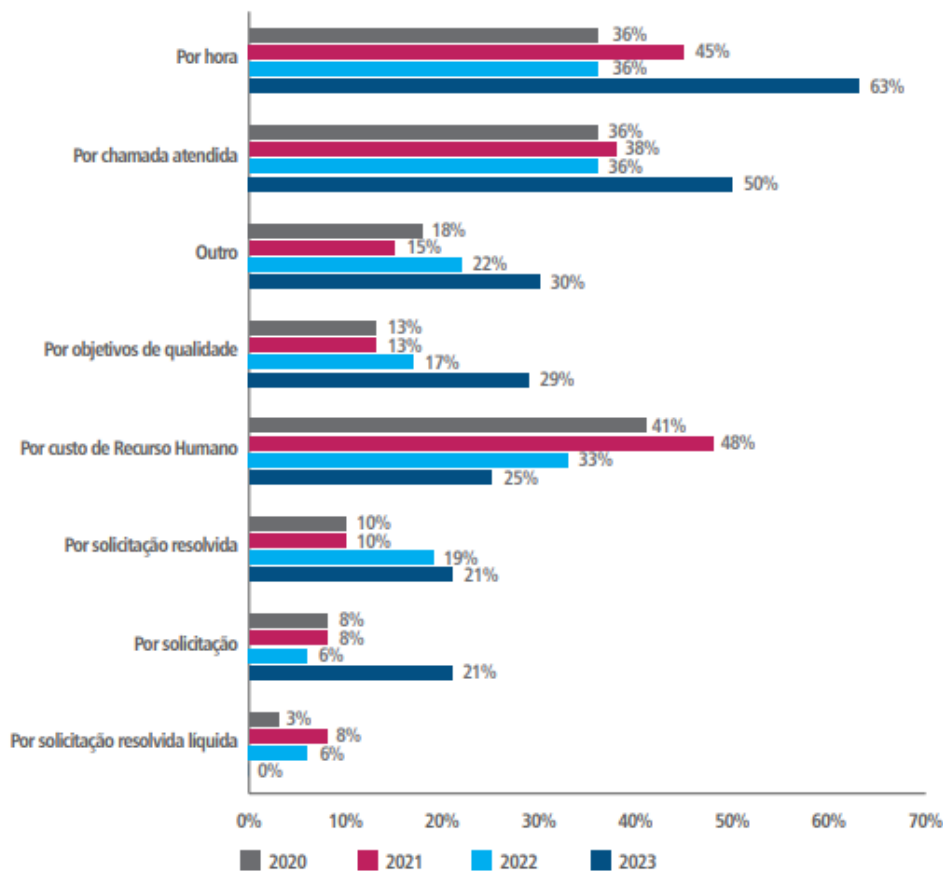


Figure 60

QUESTION: What is Outsourcer's compensation model?

COMMENT: In this question, which also allowed multiple answers, the most used remuneration model is Hourly, in 63% of cases, followed by Per call answered, with 50%. Not considering Net Resolved Request, which was not indicated in any case, the least used models were By Resolved Request and By Request, both with 21% (N=394).





06 – TECHNOLOGY

Figure 61

QUESTION: What are the main technological solutions used?

COMMENT: The most present technological solutions among the respondent Operations/service lines in 2023 are the IVR (80%), the Voice and Data Recording Solution (73%), the Dialer for Outbound and the Automatic SMS Sending Solution (both with 71%).

The solutions with the lowest use are GPS Technology and Marketing Automation (both with only 11%) (N=1314).

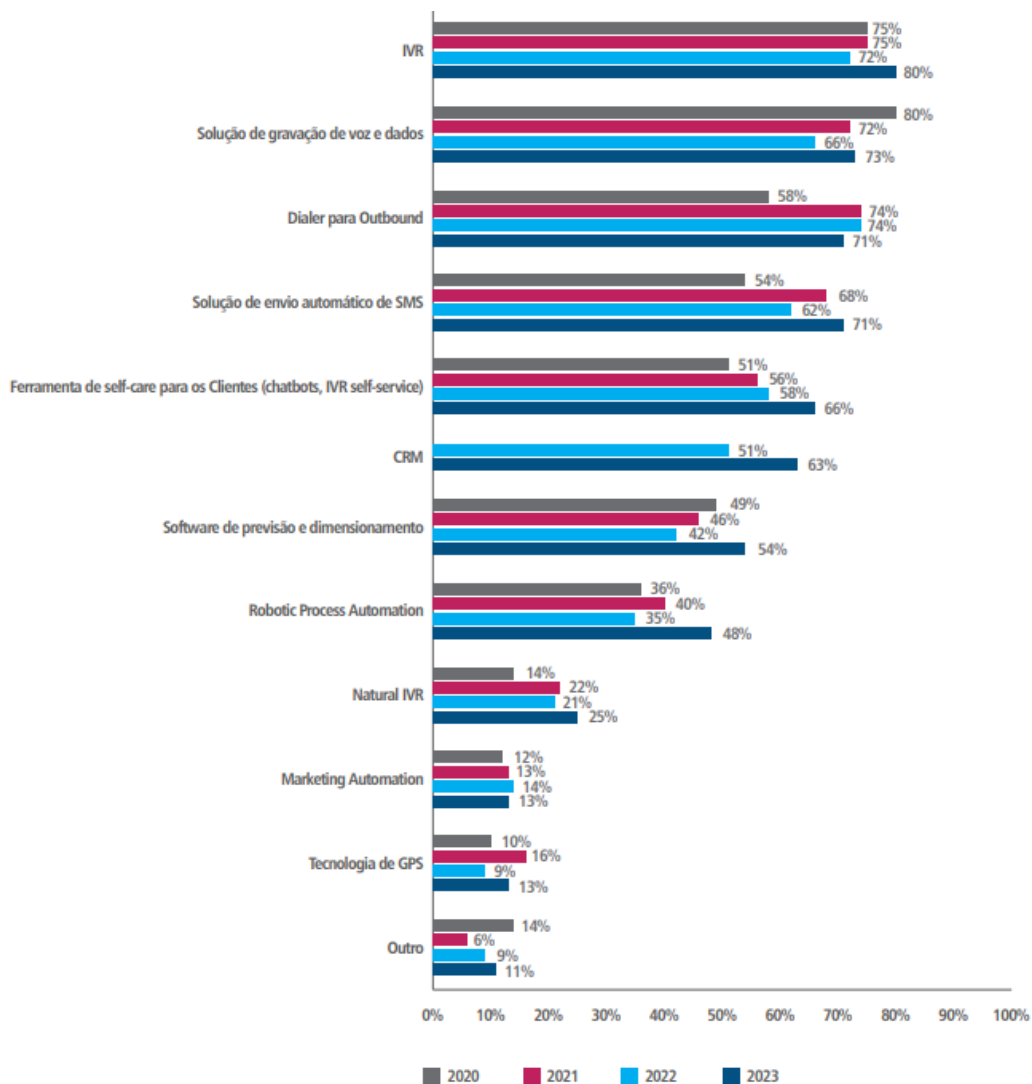


Figure 62

QUESTION: Which of these technological solutions could be implemented in the future?

COMMENT: The technological solutions that the industry most intends to implement in the future are the Natural IVR (34%) and the Self-Care Tool for Customers (32%).

The least mentioned solutions are Dialer for Outbound and GPS Technology, both with 9%, the first because it is already one of the most implemented, but the second, curiously, despite being one of the least used (N=1284).

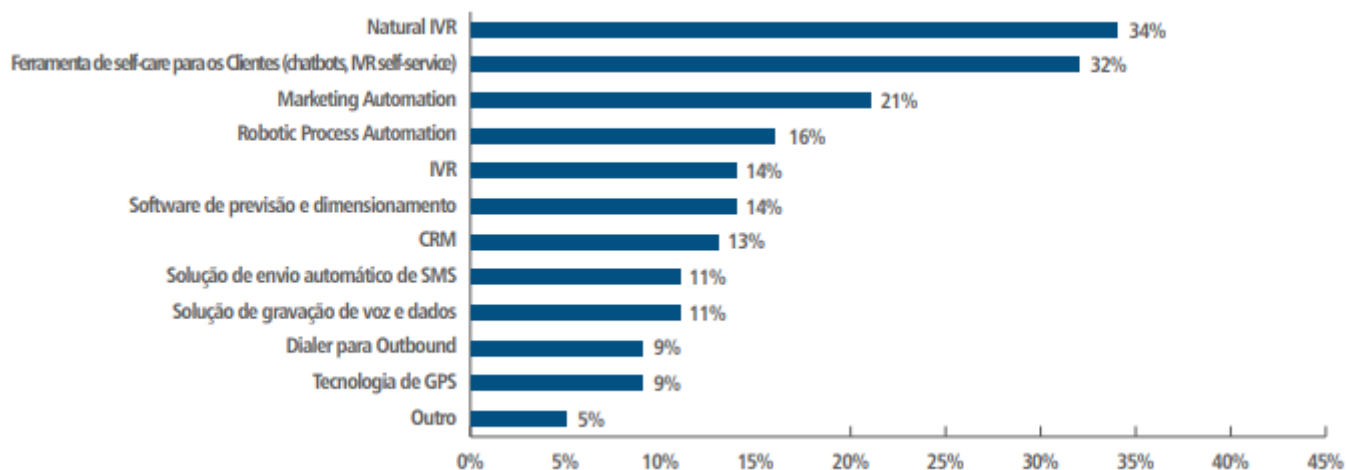


Figure 63

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

COMMENT: 40% of Contact Centers are considering the use of the Chatbot channel and 37% the Chat (WhatsApp), although in the latter there has been a cooling compared to 2022. The least mentioned channel was Social Networks (13%), as was the case last year. The most relevant drop was seen in the Natural IVR (from 43% in 2022 to the current 32%) (N=1042).

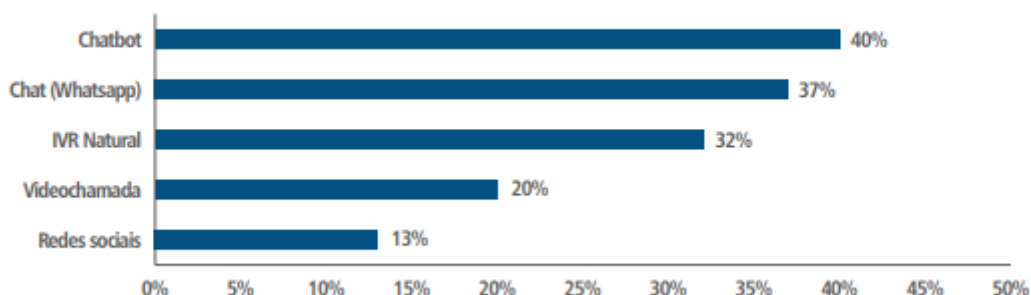


Figure 64

QUESTION: What is the percentage of calls by Bots (voice and text)?

COMMENT: After the great growth that occurred in 2021 (from 8% to 31%), the percentage of calls by Bots dropped, reaching 14% in 2023. The sectors with the highest percentage are Mail and Express Distribution (24%) and Banks and other Financial Institutions (17%). Clearly below the cross-sectoral average are Other Services, Transport and Travel (both with 2%) and Utilities (1%) (N=998).

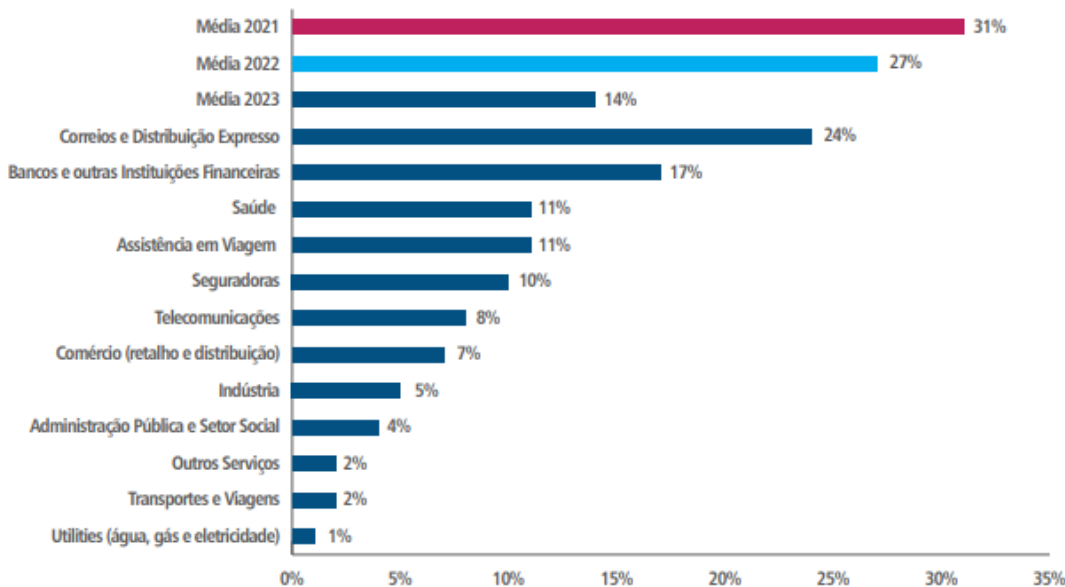


Figure 65

QUESTION: What percentage of requests are resolved by Bots?

COMMENT: The percentage of requests resolved by Bots has returned to 34% in 2021, after reaching 45% in 2022. The sectors with the highest records are Industry (80%) and Banks and other Financial Institutions (40%), while Public Administration and Social Sector has the lowest percentage (6%) (N=225).

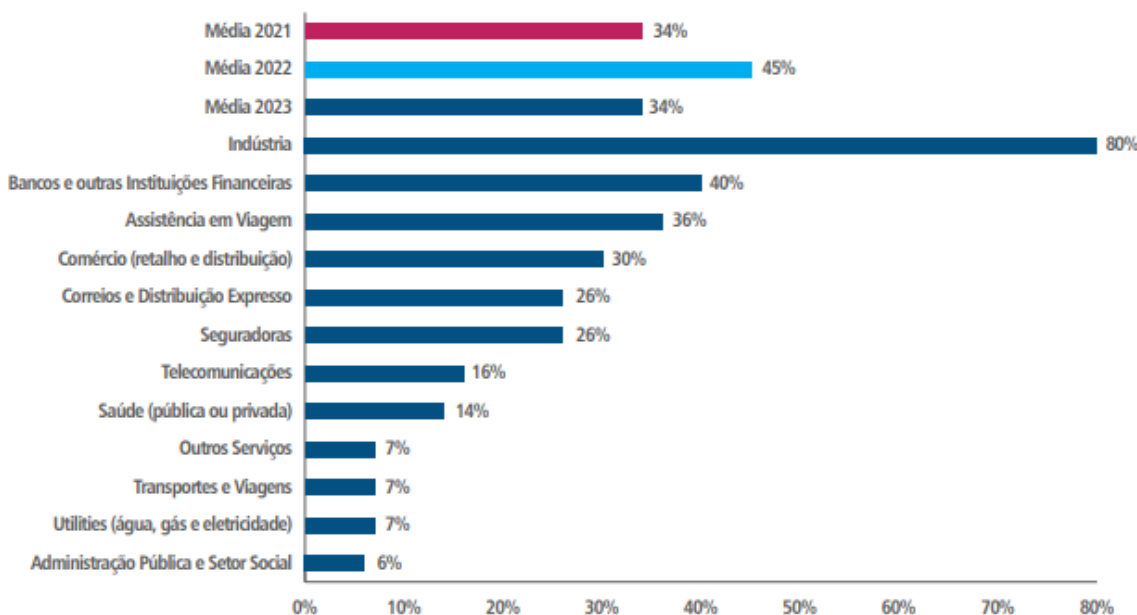


Figure 66

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

COMMENT: The most mentioned reason for offering self-care tools/channels continues to be Improving the Customer experience (87%), followed by the Customer's "Appetite" for digital solutions. The least stated reason was Improving business/sales opportunities, as seen in 2022 (N=1171).

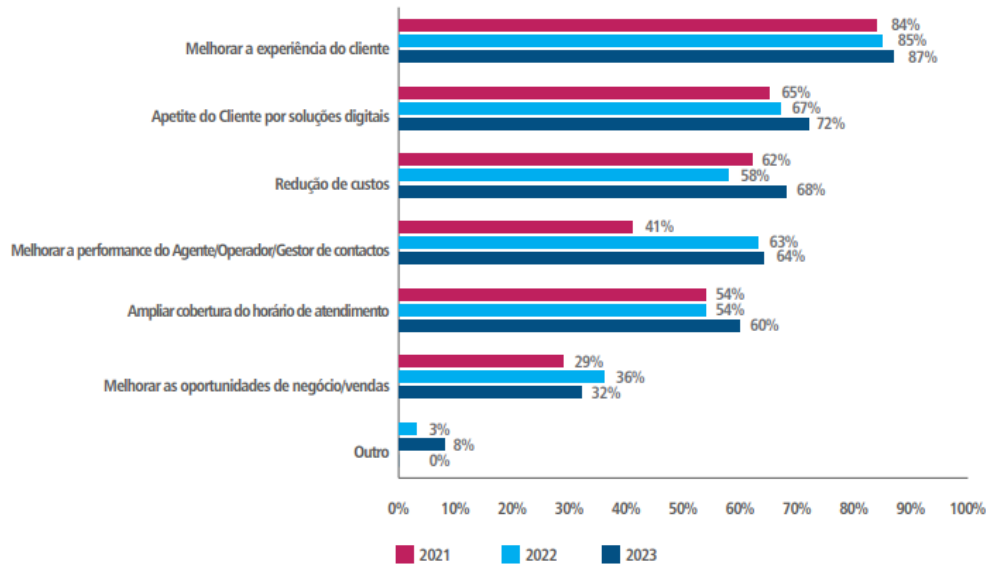


Figure 67

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

COMMENT: The biggest challenge felt in establishing efficient Self-care solutions continues to be the Difficulty in integrating systems (rising in 2023 from 55% to 72%). Implementation costs, which had dropped in 2022 to 33%, now reach 57% and Information Security is a growing concern (30% in 2021, 46% in 2022 and 51% in 2023). Specific skills required are now the least felt challenge (21%) (N=1206).

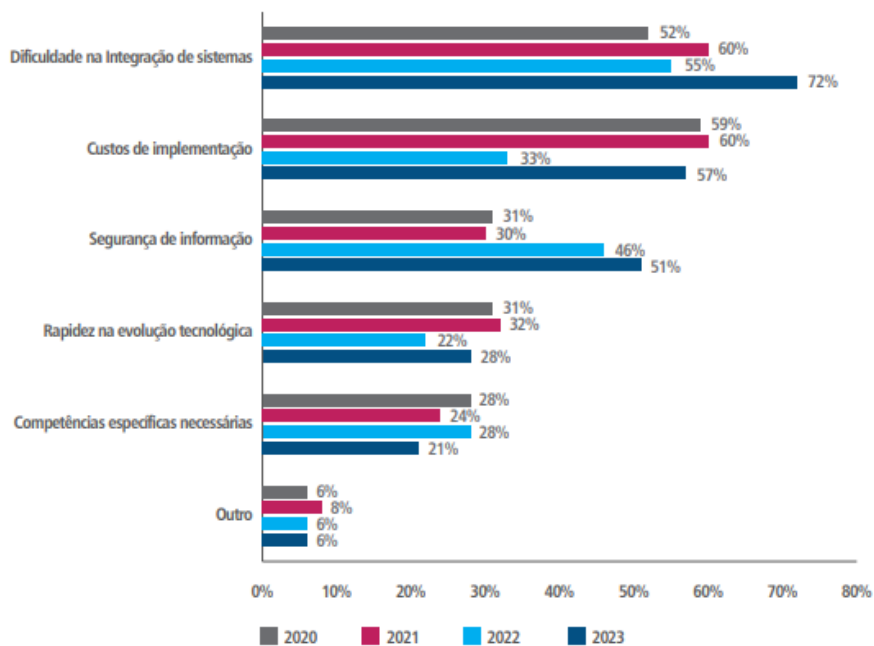


Figure 68

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

COMMENT: Cloud usage has been growing significantly, year on year, now standing at 85%, a growth of 9% compared to 2022. The sectors in which the Cloud has the highest use are Tourism, Transport and Travel, Industry, Public Administration and Social Sector (all with 100%). The sector with the lowest use is Banks and other Financial Institutions (50%) (N=1057).

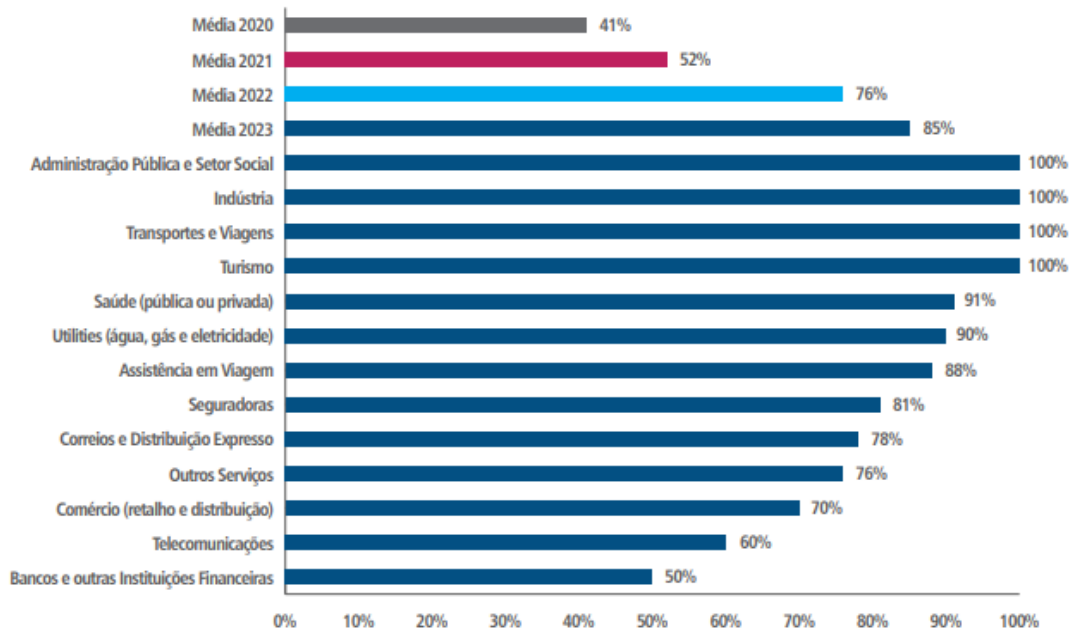


Figure 69

QUESTION: Are you considering evolving your Contact Center to the Cloud?

COMMENT: With today's massive use of the cloud, it should come as no surprise that the most frequent answer to this question is Already Implemented (67%). Among the 33% who do not yet use a cloud-based technology model, more than half plan to do so in a period of up to a year and just over a tenth consider evolving in a period of more than a year. Only 13% do not consider using the cloud (N=1309).

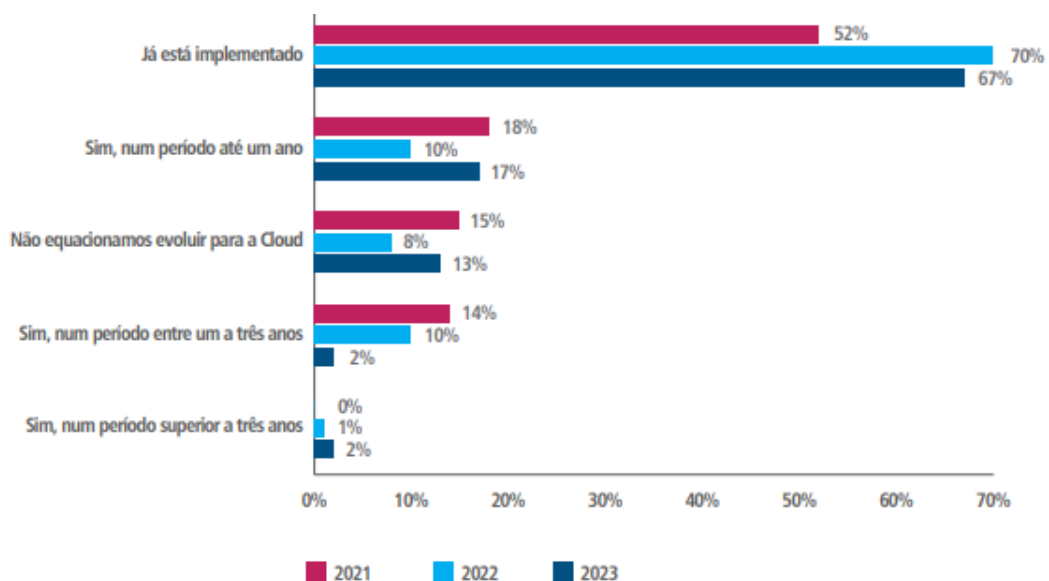


Figure 70

QUESTION: Does your organization use Gamification tools?

COMMENT: Analyzing the evolution of this indicator from 2022 to 2023, a reduction in the use of practices (from 31% to 23%) stands out, largely offset by the increase in the use of practices and tools (from 25% to 36%). Only 16% say they intend to use it in the future and 25% do not consider the concept (N=1314).

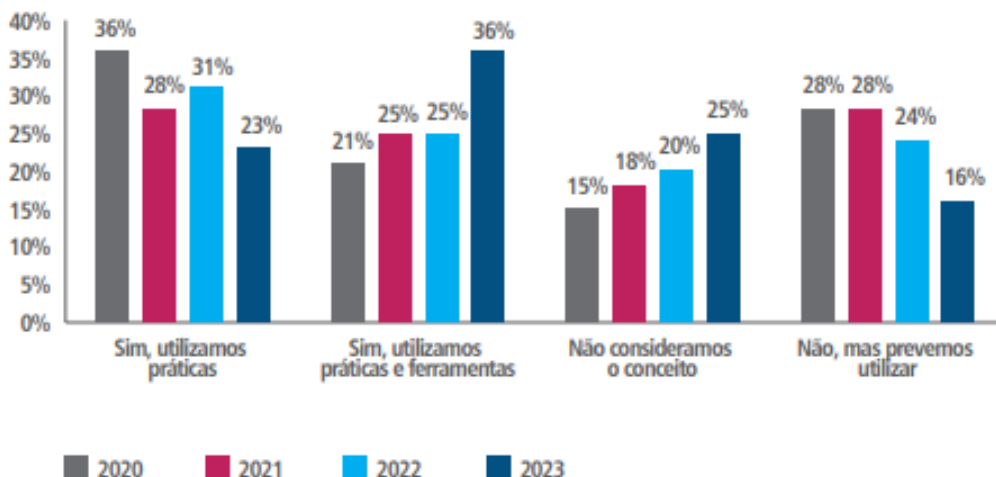


Figure 71

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

COMMENT: The constant growth, year after year, of investment in RPAs, led to the 58% seen in 2023, and it should also be considered that another 25% intend to invest (N=1172).

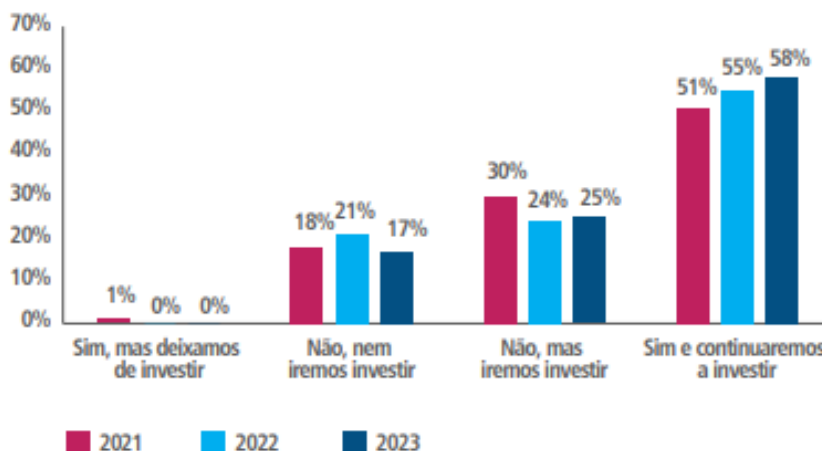


Figure 72

QUESTION: Do you currently invest in solutions based on Artificial Intelligence? Do you plan to invest in the future?

COMMENT: Investment in AI is also on the rise, with a record of 50% in 2023. Also, in AI there are 25% who intend to invest in the next year and only 4% have decided not to continue investing in 2024 (N=1197).

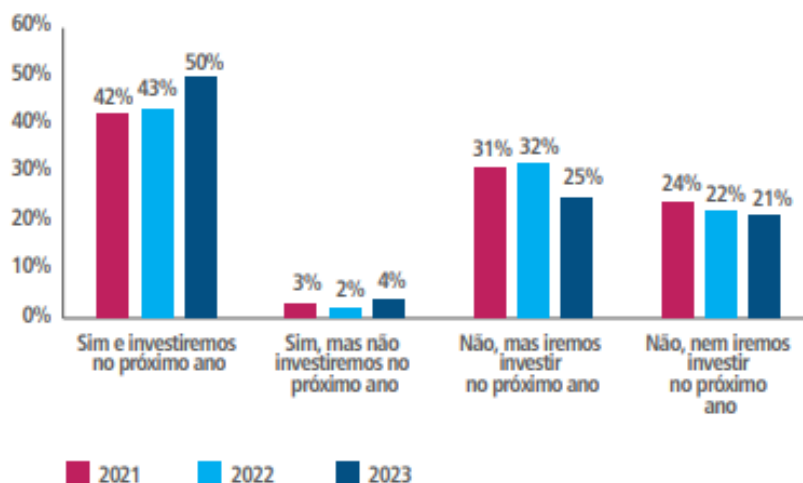
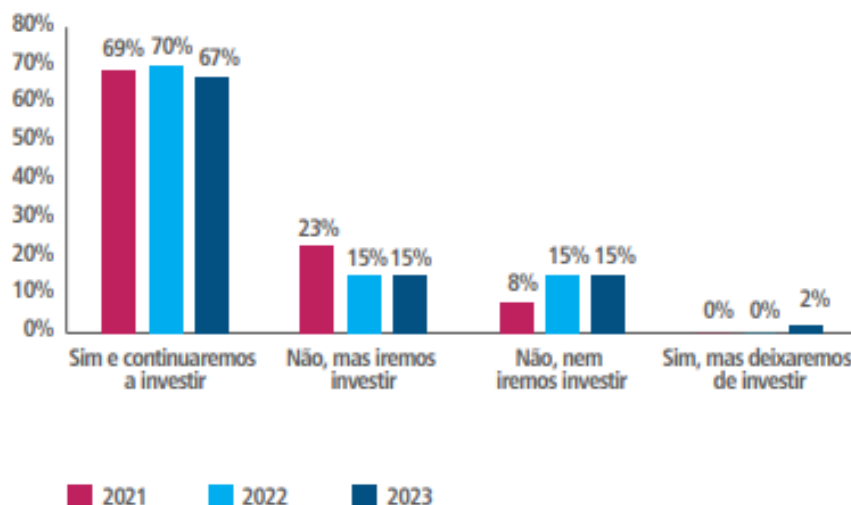


Figure 73

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

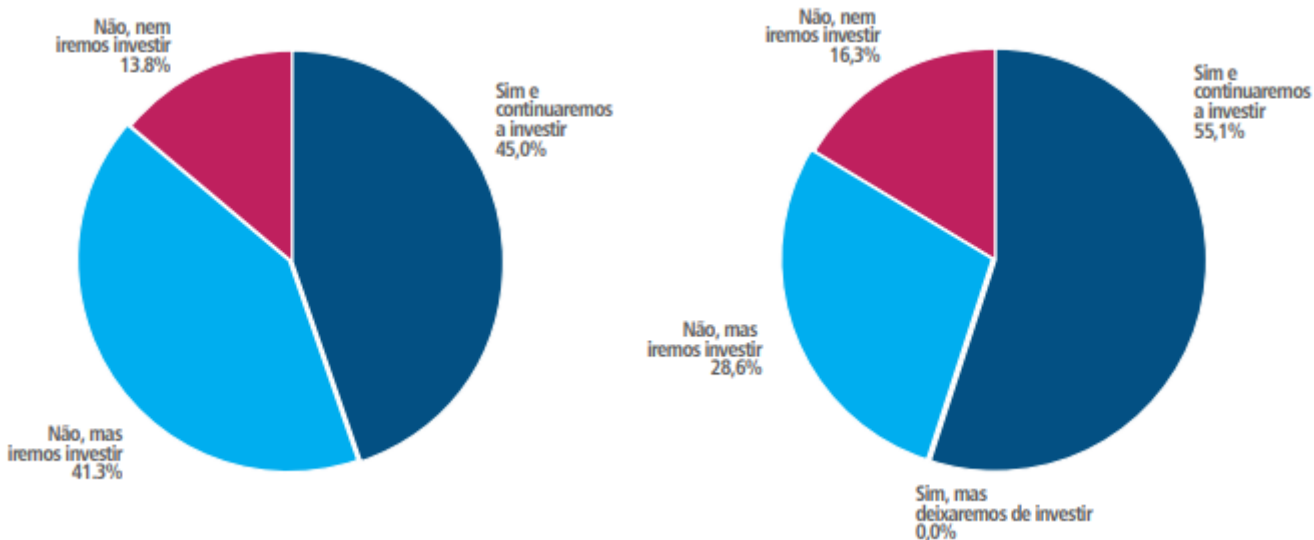
COMMENT: Although falling from 70% in 2022 to 67% in 2023, investment intentions in Omnichannel solutions remain stable, with another 15% who do not yet have the solution but will invest. It should be noted that 2% indicate that they intend to stop investing in Omnichannel (N=1370).



Figures 74 and 75

QUESTION: Do you currently invest in Bots?

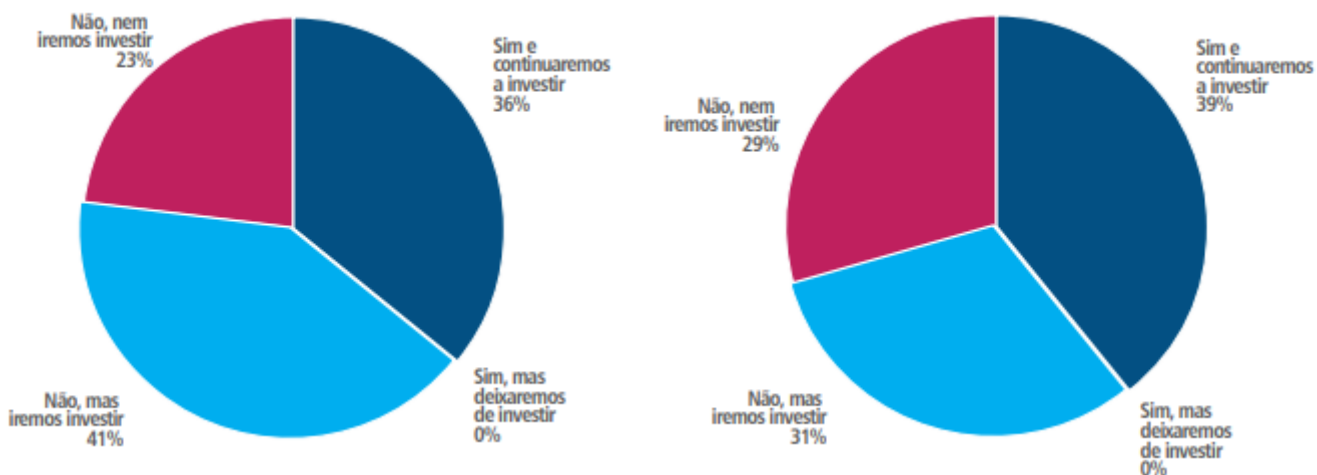
COMMENT: Investment in Bots is an increasingly strong reality in Contact Centers. In fact, in 2023 (N=1083), 55.1% invest and will continue to invest and 28.6% do not yet invest, but will invest, in an overwhelming aggregate of 83.7%. Only 16.3% do not invest and do not intend to invest (not very relevant, even though in 2022 (N=1112) they were only 13.8%).



Figures 76 and 77

QUESTION: Do you currently invest in Machine Learning?

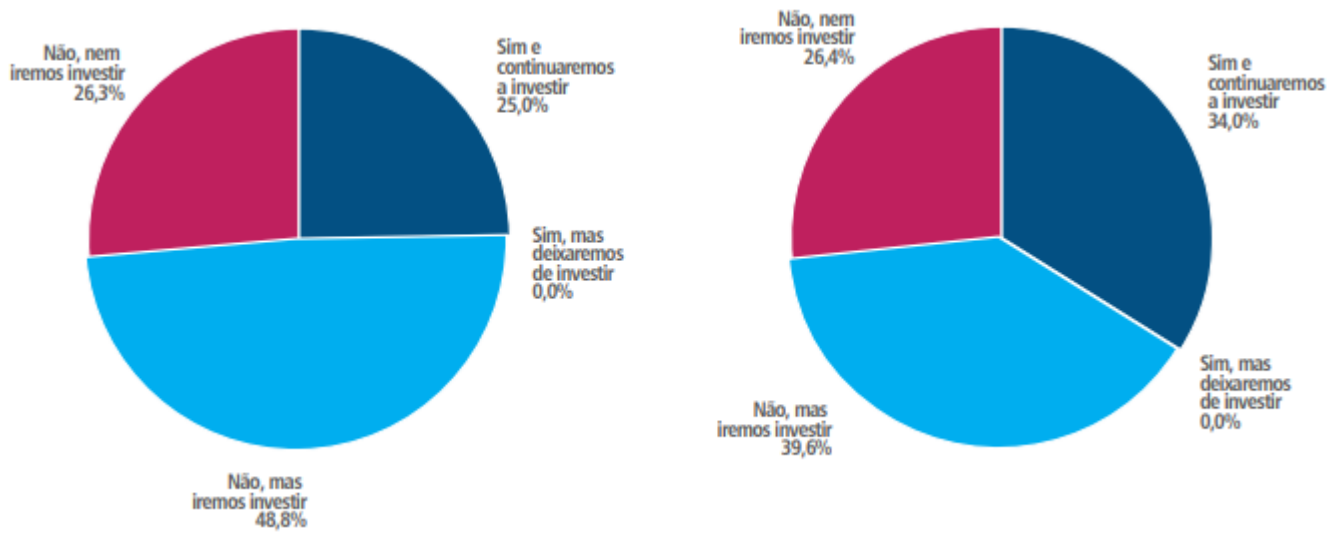
COMMENT: The percentage of Contact Centers that invest and will continue to invest in Machine Learning increased from 36% in 2022 (N=1113) to 39% in 2023 (N=1217), but we saw a reduction in the percentage of those that do not invest but intend to invest (from 41% to 31%).



Figures 78 and 79

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

COMMENT: There was a 9% increase in the percentage of those who have a Speech to Text solution and will continue to invest, from 2022 (N=1112) to 2023 (N=1250). In the same period, there was a reduction of 9.2% of those who do not own, but intend to invest, revealing that the investment intentions revealed in 2022 have materialized.



07

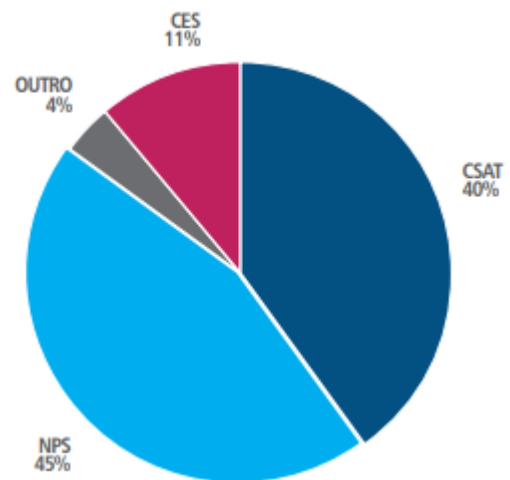
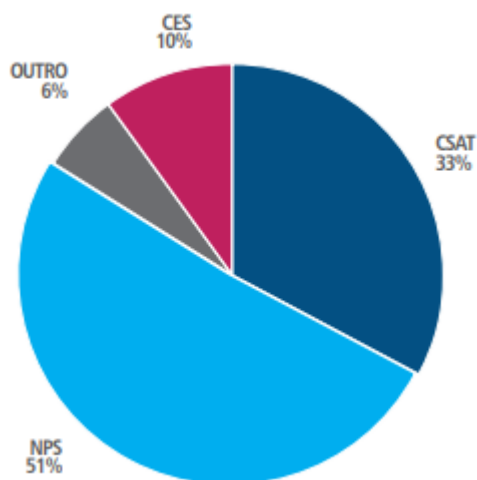


07 – CONTINUOUS IMPROVEMENT

Figures 80 and 81

QUESTION: What customer satisfaction metrics do you use?

COMMENT: The most used evaluation metric continues to be NPS, but its prevalence decreased from 2022 (N=973; 51%) to 2023 (N=1181; 45%). On the other hand, the use of CSAT increased significantly in this period (from 33% to 40%). The CES metric, although much smaller, also grew from 10% to 11%.



Figures 82 and 83

QUESTION: If you conduct customer satisfaction surveys to measure the quality of service, what is the average rating obtained in 2023?

COMMENT: We recorded a reduction in the percentage of Contact Centers that conduct customer satisfaction surveys, from 62% in 2022 to 56% (N=919). As a positive factor, the increase in the average rating is noted, from 79% to 83%. The sectors with the highest ratings are Other Services (88%) and Industry (86%). With an average rating of 85% are Health, Insurance, Telecommunications and Utilities. The lowest rankings are for Travel Assistance (80%), Banks and other Financial Institutions (81%) and Commerce (82%). It is worth noting the stability of this important indicator both over the years and across sectors (N=919).



Figure 84

QUESTION: What is the percentage of calls in 2023 with quality measurement evaluated by the Customer (through a satisfaction survey)?

COMMENT: We saw a small reduction in the percentage of calls with a customer satisfaction survey (from 32% in 2022 to 29% in 2023). The sectors in which the percentage of calls with a survey is higher are Utilities (39.6%) and Travel Assistance (29.3%). The lowest values are found in Mail and Express Distribution (6%) and in Public Administration and Social Sector (18.2%) (N=798).

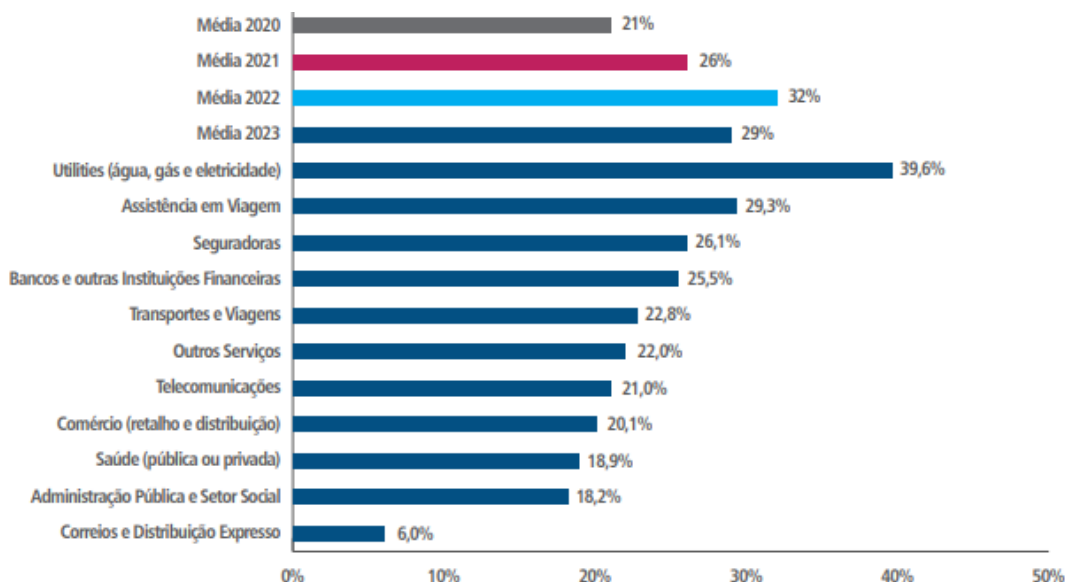


Figure 85

QUESTION: What percentage of contacts will be subject to internal monitoring in 2023?

COMMENT: Correcting the remarkable growth that occurred in 2022, the percentage of contacts targeted by internal monitoring returned to the 8% that had occurred in 2021. We found the highest records in Mail and Express Distribution (15.8%) and Travel Assistance (15.6%). The lowest values occur in Telecommunications (3.1%) and Banks and other Financial Institutions (5.2%) (N=892).

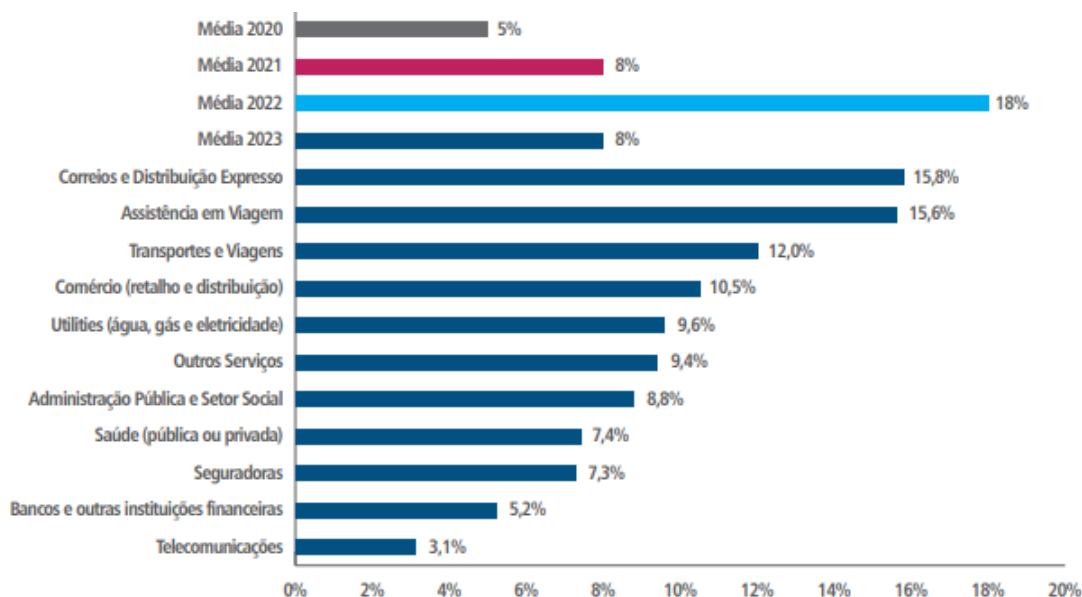


Figure 86

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

COMMENT: The certification of Contact Center operations remains a concern for Organizations and only 2.2% of the responses indicate that they do not want any certification. The three most used certifications grew significantly from 2022 to 2023: ISO 9001, from 66% to 82.2%, the APCC Quality Seal, from 45% to 68.9% and ISO 27001, from 26% to 37.8%. It is worth mentioning the percentage of those who are in the process of certification (11.1%) and those who intend to become certified (13.3%) (N=1371).

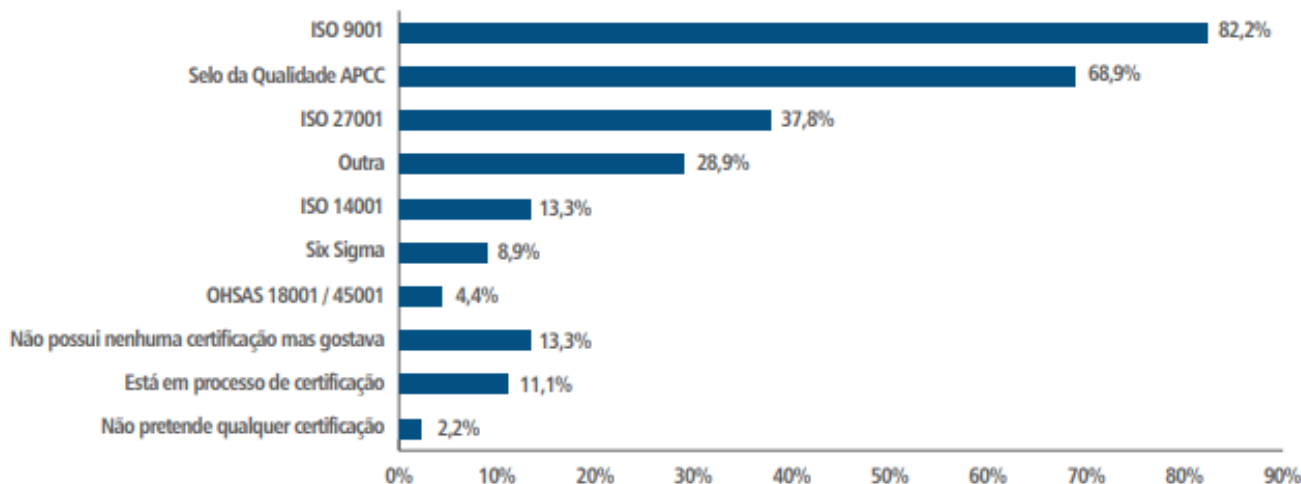
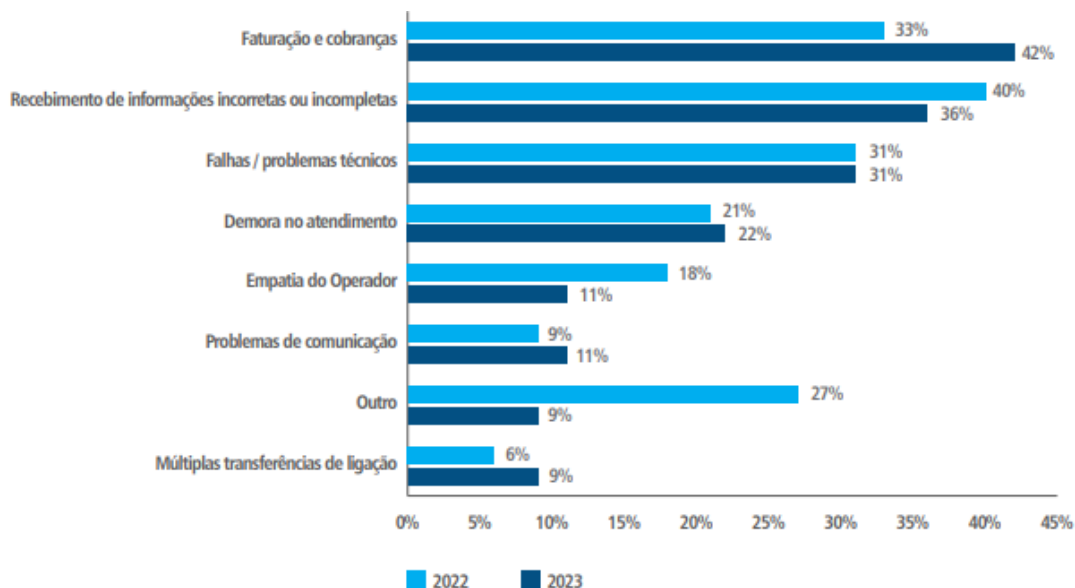


Figure 87

QUESTION: What are the main reasons for complaints received from the Contact Center service in 2023?

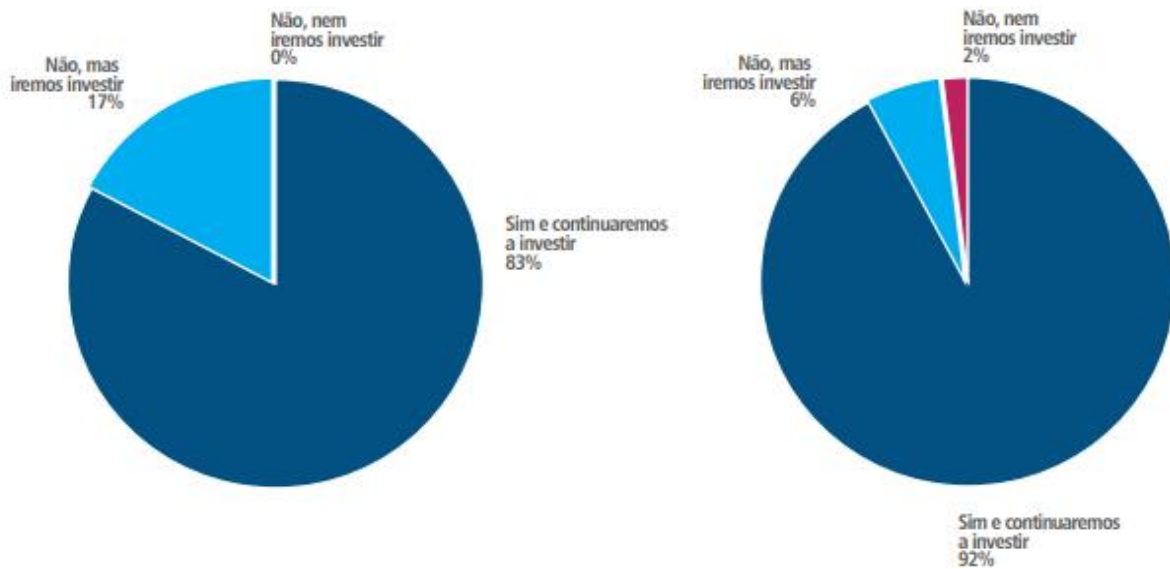
COMMENT: The most mentioned reasons for complaint of the Contact Center service continue to be Billing and collections (42%) and Receipt of incorrect or incomplete information (36%) The least mentioned reasons are Multiple Call Transfers (9%), Operator Empathy and Communication Problems (both with 11%) (N=1104).



Figures 88 and 89

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

COMMENT: The percentage of Operations that invest and intend to continue investing in Customer Experience projects grew from 2022 (N=1053) to 2023 (N=1313), from 83% to 92%. Among the 8% who do not yet invest, three-quarters intend to invest and only a quarter said they do not intend to invest.





08 – FINANCIAL DATA

Figure 90

QUESTION: In what range is the Contact Center turnover in 2023?

COMMENT: This question was asked only to Outsourcers and the answers reflect the dimensions of these Economic Agents so relevant to our Industry. 52.6% of the Outsourcers have a turnover between 10 M€ and 50 M€ and 31.6% indicate a turnover of more than 50 M€ (N=709).

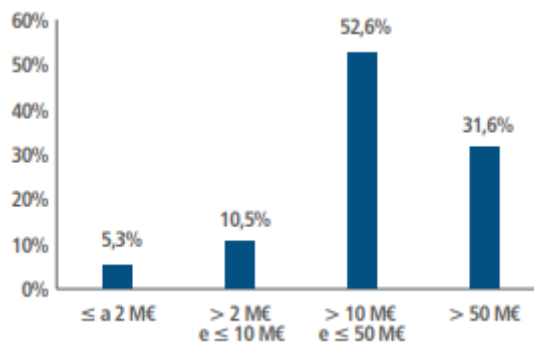


Figure 91

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

COMMENT: Being, fundamentally, a People Industry, the percentage weight of Salaries and Bonuses is predominant. Even so, there was a reduction from 2022 to 2023 (from 84% to 81%). On the other hand, the percentage of Technology increased (from 4% to 6%). This growth in the percentage related to Technology, namely Automation, may justify the reduction in the relative weight of Salaries and Bonuses. The Hiring and Training component also grew (from 4% to 5%) (N=818).

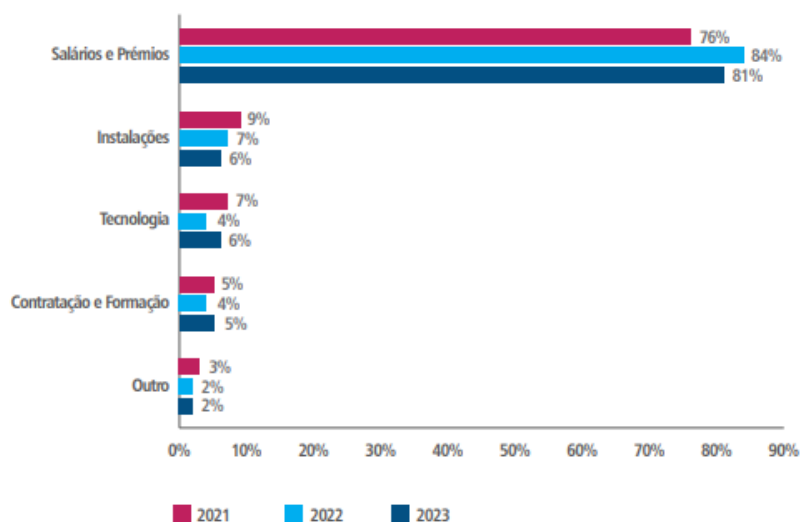


Figure 92

QUESTION: What is the average cost per contact?

COMMENT: As it is one of the questions of the Benchmarking Study with the lowest volume of responses, traditionally, its conclusions cannot be taken absolutely, but only as a revealer of trends. In the last four years, the value has fluctuated between €2.15 in 2022 and €2.42 in 2021. In 2023 we recorded €2.24, with a growth of 4.2% compared to the previous year (N=263).

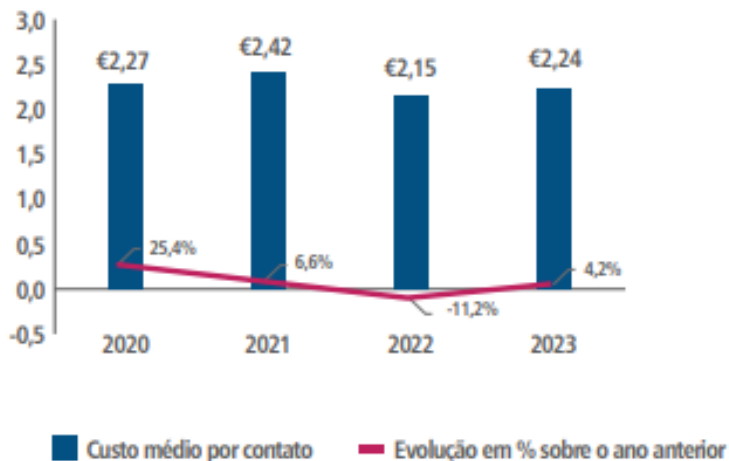


Figure 93

QUESTION: What is the average cost per resolved request?

COMMENT: On this issue, and for the same reasons, the recitals of the previous question are reaffirmed. In the last four years, the value has fluctuated between €2.66 in 2021 and €3.77 in 2022. In 2023 we recorded €3.08, a decrease of 18.3% compared to the previous year (N=259).

