apcc
associação
portuguesa de
contact centers

Estudo de Caracterização e Benchmarking

ATIVIDADE DE CONTACT CENTERS

2021

everis
an NTT DATA Company

Characterization and Benchmarking Study

Contact Centers´ Activity in Portugal

2021

INDEX

Preface

The 2021 edition of the Study of Characterization and Benchmarking of the Activity of Contact Centers in Portugal, compiling data for 2020, assumes particular relevance for addressing, in its various dimensions, the impacts of an unprecedented exercise, highly marked by the pandemic situation.
This initiative, which has been held annually since 2006, is one of the most important actions that the APCC develops to allow the most detailed knowledge about this industry of vital importance for the Portuguese Economy.
Over the years, the various Players of our Sector and other Economic and Political Agents, have used this Study as a fundamental tool for analysis and decision-making.
The unusual representativeness of the sample mirrored in this Study, corresponding to more than 40% of the sectors universe, gathering responses from 932 operations, in which almost 42,000 employees work, is the reliability warranty of the presented data. The conclusions of the Study are the safest and most effective response to the criticism that some sectors insist when addressing an Industry that demonstrates its resilience and importance, which has been further demonstrated in these particularly difficult circumstances, both social and economic, that have been happening since March 2020.

This Study is organized in its 8 usual dimensions:

- Characterization - In its national dispersion and in the global dimensions;
- Operational Performance - Understand the behavior of the main indicators;
- Human Resources - Monitor the quantitative and qualitative evolution of human resources in the Sector;
- Policies and Benefits - Observe the evolution of remuneration policies and benefits;
- Resort to Outsourcing - Recognize the main trends of Companies that resort to Outsourcing;
- Technology - Understand the main trends of Companies in this Industry in their technological options;
- Continuous Improvement - Understand the means of continuous improvement most adopted in the constant search for excellence in performance;
- Financial Data - Have an overview of the financial data of the Companies in this Sector.

APCC appreciates the availability of all the responding Companies, especially our associates. It is this availability that allows the elaboration and distribution of this important work tool for all interested in the Sector.
Thanks are also due to everis, for the commitment in the execution of this work and for the high professionalism, great competence and utmost dedication of the technical staff involved.

Ana Gonçalves

General Secretary

Methodological Note

This year’s study was answered by a total of 932 service lines, operated by several Companies from different Sectors of activity. This represents a significant increase in the volume of responses to the studies of previous years (2017 - 89 lines; 2018 - 143 lines; 2019 - 722 lines).
It follows that the 2020 Study is even more representative of the Contact Centers Sector in Portugal, mirroring more reliably the reality of this Industry.
The Study maintains the structure used in previous years, focusing on the profile, operational performance, policies and benefits of employees, as well as in an attempt to identify the main trends related to technological innovation in the Sector.
It is intended that this Study continues to be seen as a tool of analysis and assistance in decision-making for organizations that operate in the Sector.
Following the method used in previous editions of the Study, the information collected is presented according to 3 dimensions: global analysis, analysis by economic sector and finally, analysis by contact center service line. Data processing follows robust mathematical methodologies that ensure the correct determination of calculations for the 3 dimensions mentioned. The average values available in the Human Resources and Policies and Benefits sections correspond to weighted averages by the number of employees per Sector of activity.
The analysis of the results of the 2020 averages should take into account the potential impact inherent in the difference in the number of lines that responded.
Finally, on behalf of the APCC and everis, we leave our deepest thanks to all the Organizations that participated in this Study and their representatives for their commitment and cooperation with this initiative.

Executive Summary 2021

Introduction and framework of the Characterization and Benchmarking Study

The Portuguese Association of Contact Centers (APCC), in partnership with everis, holds this year the 16th edition of the Characterization and Benchmarking Study. The study aims to analyze the evolution of the main indicators of the Contact Centers Sector and the presentation of behavior and trends at the national level.
We highlight the vital participation of 932 service lines, constituting an increase in the sample by 210 lines compared to that observed in 2019. This ensures a significant representativeness of the Sector in Portugal and demonstrates the importance that the Study has been acquiring as a way of characterizing and analyzing the evolution of the Sector compared to previous years, being also considered a decision support instrument.
This year's Study continues, as in previous years, to reflect the update of key contact center practices/technologies.

Current Situation of Contact Center Activity

Sample Characterization

Regarding the geographical distribution of the number of Contact Center Employees, there is a trend of centralization, since 58.8% and 18.3% of Human Resources in Portugal are in Lisbon and Porto, respectively.

In Portugal, Customer Service remains the most representative Contact Center function, ensured by 87% of respondents (representing an increase of 3 percentage points compared to 2019), followed by Back-Office activities (65%) and Complaint Management (48%), which recorded increases of 21 and 8 percentage points compared to last year.

Regarding the distribution by Sample Sector, the activity of Contact Centers in Portugal presents a predominance of Outsourcing Companies (28%, an increase of 6 percentage points compared to 2019), maintaining the growth trend observed in the studies of previous years. This Sector also has 75% of the total FTE of the considered sample, which represents an increase of 5 percentage points. As last year, Banks and other Financial Institutions (17%) and Insurance (12%) appear after Outsourcers as predominant Sectors of activity in this year's Study.

Operational Performance

Compared to 2019, it was possible to determine improvements in some operational performance indicators in Contact Centers, namely:

- A decrease in the average time of request resolution (excluding complaints) from 11.92 hours to 10.28 hours;
- A decrease in the average time of complaints resolution from 3 days to 1.8 days;
- An increase in the success percentage of Outbound retention calls from 27% to 31%.

In contrast, there have been some indicators which have shown a decline in relation to the previous year at the operational level, namely:

- An increase in the “time on hold” from 59 seconds to 74 seconds;
- An increase in the average waiting time to be attended by the Contact Center from 49 seconds to 74 seconds;
- A decrease in the resolution rate at the first contact from 87% to 83%;
- A decrease in the success rate of Inbound retention calls from 65% to 60%;
- A significant decrease in the percentage of successful sales on Outbound calls from 30% to 16%;
- A decrease in the average number of written requests answered per Operator per hour from 9.4 to 8.7.

Human Resources

In this year's study it was possible to ascertain that 81% of respondents conduct satisfaction surveys of their employees, most of which were made on an annual basis (67%). The average rating obtained in these surveys rose from 74% to 82%.

The rotativity rate of Operators and Supervisors has dropped from 33% to 20% and from 12% to 4%, respectively. This decrease is associated with an increase in the average seniority of these employees (from 35 to 36 months for Operators and from 68 to 85 for Supervisors).

Contrary to what happened in 2019, the percentage of employees with an effective contract increased from 46% to 51%, with a decrease from 45% to 43% of term contract workers and from 8% to 5% of temporary workers. On the other hand, the proportion of workers under green receipts decreased from 0.7% to 0.4%.

Policies and Benefits

In 2020, the Operators average monthly gross salary was €869. The sectors that recorded the highest average monthly salaries were Mail and Express Distribution (€1,158), Banks and Financial Institutions (€961) and Travel Assistance (€851). On the other hand, the lowest average amounts were recorded in Telecommunications (635€), Tourism (635€) and Public Administration (675€). These values correspond only to the base remunerations and do not take into account the associated variable component.

In the same period, the Supervisors average gross monthly salary stood at 1,025€. This is 18% higher than that of Operators. The sectors with the Supervisors highest average salaries were Mail and Express Distribution (€1,543), Banks and Commerce (€1,386) and Financial Institutions (€1,253), while the lowest figures were in the Telecommunications (€750) and Tourism (€750) sectors.

Resort to Outsourcing

With regard to the percentage of Companies that use and plan to continue to hire Outsourcing Companies, there was a decrease compared to 2018, from 73% to 68%. Regarding the reasons that lead organizations to hire outsourcing services, the need for specific skills (74%) and cost reduction (66%) remains at the top of the list.

The services contracted in outsourcing model were mainly Operators (73%), Back-Office or Administrative Tasks (53%) and Supervisors (50%) and the predominant remuneration models, as observed in the previous study, are the models "by human resource cost" (41.03%), "per hour" (35.90%) and "per call answered" (35.90%).

Technology

The technological solutions predominantly used in Contact Center activity are voice and data recording solutions (80%) and the IVR (75%), and the significant growth in the use of RPA and Natural IVR technologies (25% to 36% and 7% to 14%, respectively) is also highlighted.

With regard to betting on new options, 41% of respondents plan to invest in making Bots available to their customers, while 35% want to invest in Chat and Natural IVR solutions.

It should be noted that in 2020 the percentage of calls performed by Bots was 8%, accompanied by a percentage of resolved requests of 21%.

When asked about the reasons for offering self-care service channels, 91% of respondents answered "improve the customer experience", remaining as the main focus in the development of this solution. The biggest challenges for the implementation of these channels remain implementation costs (59%) and difficulty in integrating systems (52%). There was also a greater intention to use a Cloud model, with 38% of respondents indicating that they already use this model, and with 27% indicating that they want to evolve their Contact Center to the Cloud during the next year. It is also interesting to see that only 14% do not consider evolving to the Cloud, representing a decrease of 8 percentage points compared to 2019. In 2020 there was a decrease in the percentage of respondents who do not have but plan to invest in RPA technology (from 46% to 38%), accompanied by an increase in the percentage of respondents who invested and plan to continue investing in this technology (from 37% to 43%).

In relation to Artificial Intelligence solutions, 40% of the sample has this technology (which represents an increase of 5 percentage points compared to the previous year), and there was a decrease in the percentage of respondents who do not have this solution and do not plan to invest in 2021 (from 26% to 23%).

Regarding customer experience, there was a significant increase in the number of respondents who do not invest or plan to invest in this type of projects (from 2% to 14%).

Finally, the percentage of companies using Speech to Text solutions decreased compared to last year (from 27% to 21%).

Continuous Improvement

With regard to continuous improvement, the percentage of respondents conducting customer satisfaction surveys increased compared to 2019 (from 79% to 83%), and the average percentage of calls that are evaluated by the customer also increased (from 18% to 21%). For the average ranking obtained in those same surveys, this remained the same compared to last year (82%).

Conclusion

The results of this year's Study show, in general, a worsening in operational performance indicators, and the pandemic context may have contributed strongly to this trend (e.g. change in the work conditions and pressure in remote contact channels). In 2020, there was a significant increase in the average number of Inbound contacts (per day), from 1.4 to 2.1 million. At the level of Contact Center employees, we highlight the improvement of the results of satisfaction surveys, as well as the increase in Operators average salaries compared to previous years (positioning at an average value of 869€). As regards rotativity, the Operators average rotativity rate from 33% to 20% has decrease.

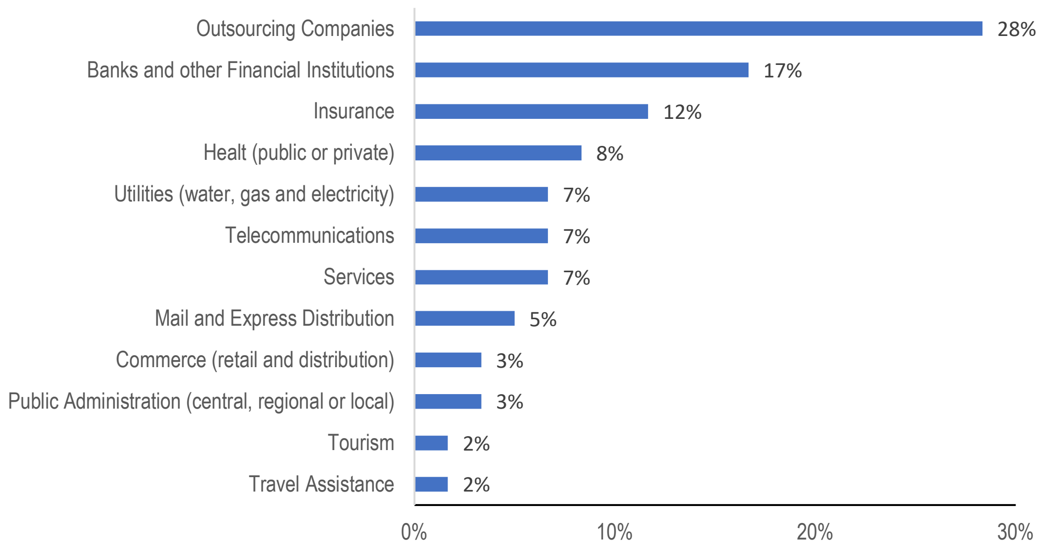
As for technology, this year there was a greater focus on the Cloud solutions, also observing a potential increase in the adoption of Self-Care solutions (namely chatbots) aimed at improving the Customer Experience.

1 Characterization

QUESTION: What is the number of operations involved?

COMMENT: The Characterization and Benchmarking Study of 2020 was answered by 932 service lines, operated by several companies from different sectors of activity. This represents an increase over the volume of responses from the Previous Year's Study (2019 - 722 lines). The main responders were Outsourcing Companies (28%), Banks and other Financial Institutions (17%), Insurance (12%) and Health (8%).

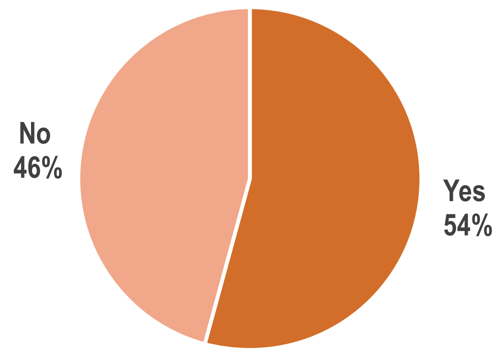
FIGURE 1
SECTOR OF ACTIVITY (N = 932)



QUESTION: Does the Company work through Outsourcing Companies?

COMMENT: 54% of Contact Centers operations operate through Outsourcing Companies.

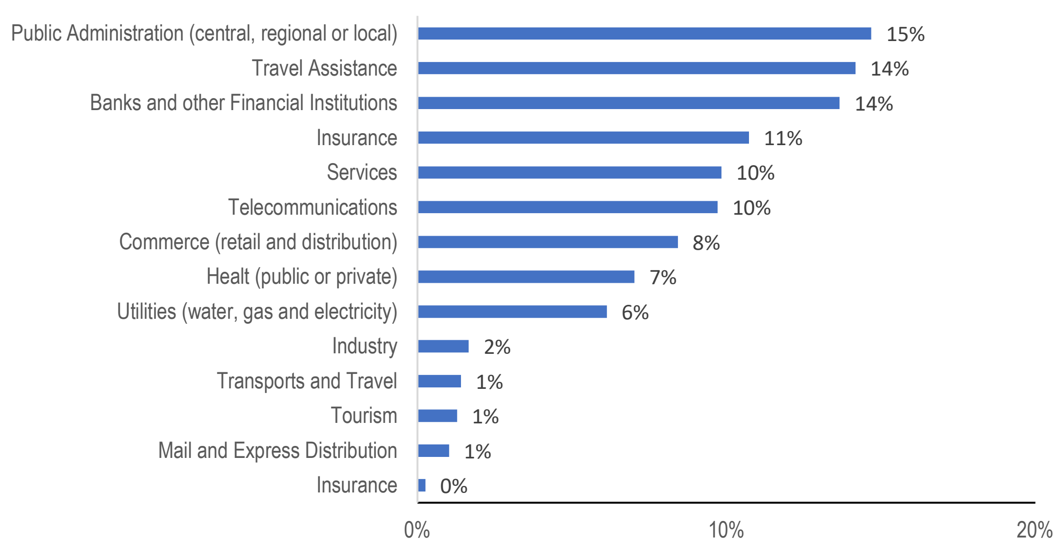
FIGURE 2
NATURE OF THE OUTSOURCING OPERATION (N=927)



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

COMMENT: Regarding the commitment by sector of the different respondents (including Outsourcing Companies), in this year's Study the sectors with the highest number of operations / service lines were the Public Administration (15% of the total lines / operations), Travel Assistance (14%), Banks and other Financial Institutions (14%) and Insurance (11%).

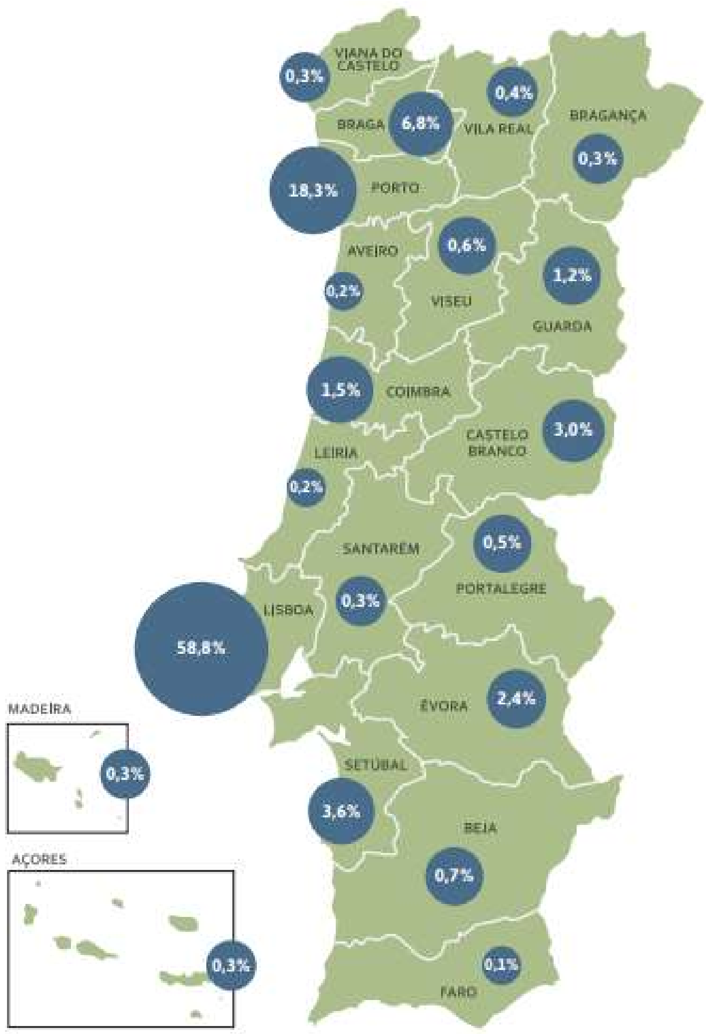
FIGURE 3
DISTRIBUTION OF THE LINES BY ECONOMIC SECTOR (N=813)



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

COMMENT: The majority of Human Resources of Contact Centers are in Lisbon (58.8%), followed by Porto (18.3%), Braga (6.8%), Setúbal (3.6%) and Castelo Branco (3.0%).

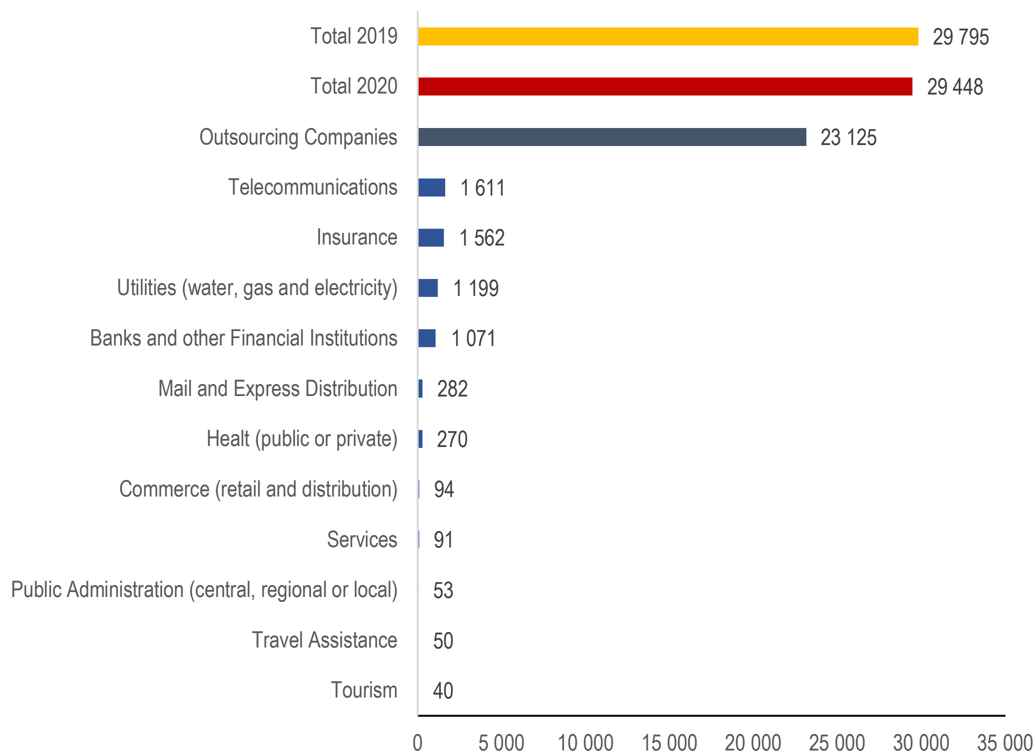
FIGURE 4
DISTRIBUTION OF HUMAN RESOURCES BY LOCATION (N=927)



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

COMMENT: Contrary to the trend observed in 2019, in 2020 the number of service positions decreased slightly (-1%) compared to the previous year, to 29,448. In 2020, the Outsourcing Companies became even more prevalent (23,125), accounting for 79% of total positions, followed by Telecommunications (1,611), Insurance (1,562), Utilities (1,199) and Banks and other Financial Institutions (1,071).

FIGURE 5
NUMBER OF SERVICE POSITIONS (PAs) IN THE CONTACT CENTER (N=916)

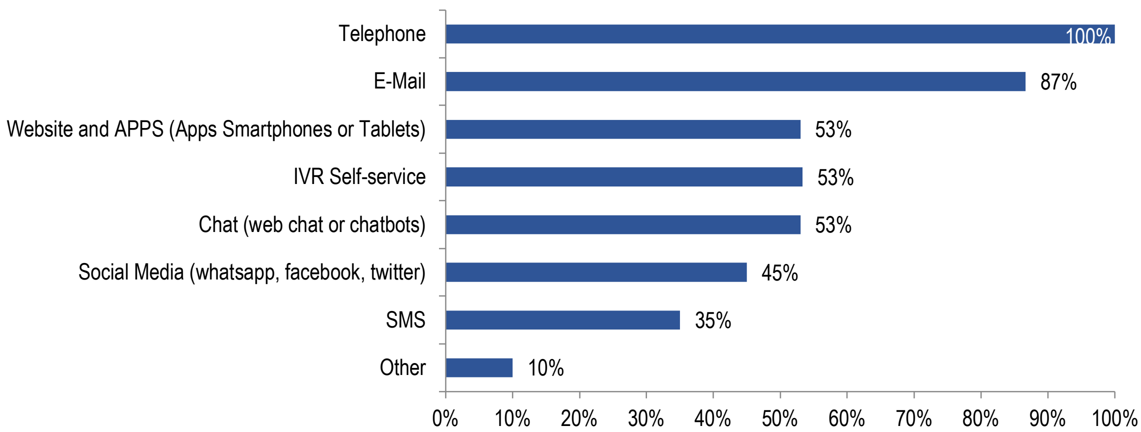


QUESTION: What channels are made available by the Contact Center to the Customer?

COMMENT: As verified in the 2018 and 2019 Studies, all participants use the Telephone as a mean of contact. There was a downward trend in the use of Websites and APPS (53% instead of 64%), IVR (53% instead of 58%), Social Media (45% instead of 47%) and SMS (35% instead of 44%). On the contrary, there was a slight increase in the use of E-mail (87% instead of 85%) and the use of Chat - Web Chat or Chatbots (53% instead of 38% and 20%, respectively).

FIGURE 6

CHANNELS MADE AVAILABLE TO CUSTOMERS BY THE CONTACT CENTER? (N=932)



QUESTIONS: What are the total Human Resources allocated to Contact Center operations? Indicate the number of Operators, of Supervisors and the total number of Support Staff.

COMMENT: The distribution of Human Resources allocated to Contact Center operations remained very similar compared to the Studies of the last two years, with only a slight increase in the percentage of Support Staff compensated by a decrease in the percentage of Operators (approximately 6% Support Staff, 7% Supervisors and 87% Operators instead of 5%, 7% and 88%). The total number of Employees increased by about 3% compared to 2019 (42,889 instead of 41,812), which can be partly explained by the increase in the number of responses to the Study. The ratio of Operators and Supervisors remained virtually unchanged, although the number of Operators per Support Staff decreased compared to 2019 (14.8 instead of 17.1).

FIGURE 7

TOTAL HUMAN RESOURCES OF OPERATIONS UNDER STUDY (N=892)

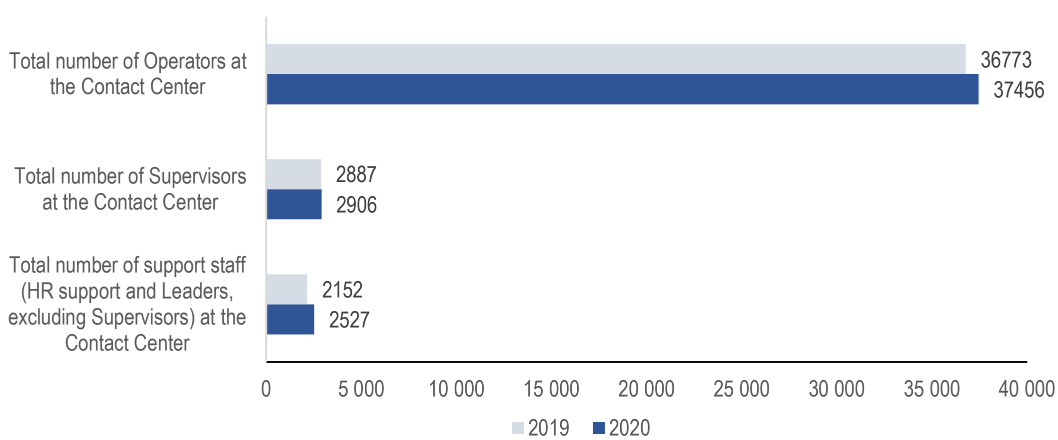
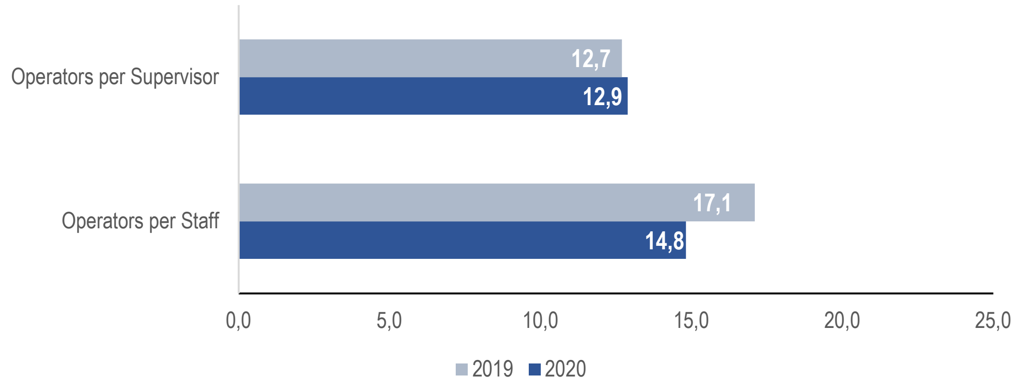


FIGURE 8

HUMAN RESOURCES RATIO OF OPERATIONS UNDER STUDY (N=892)

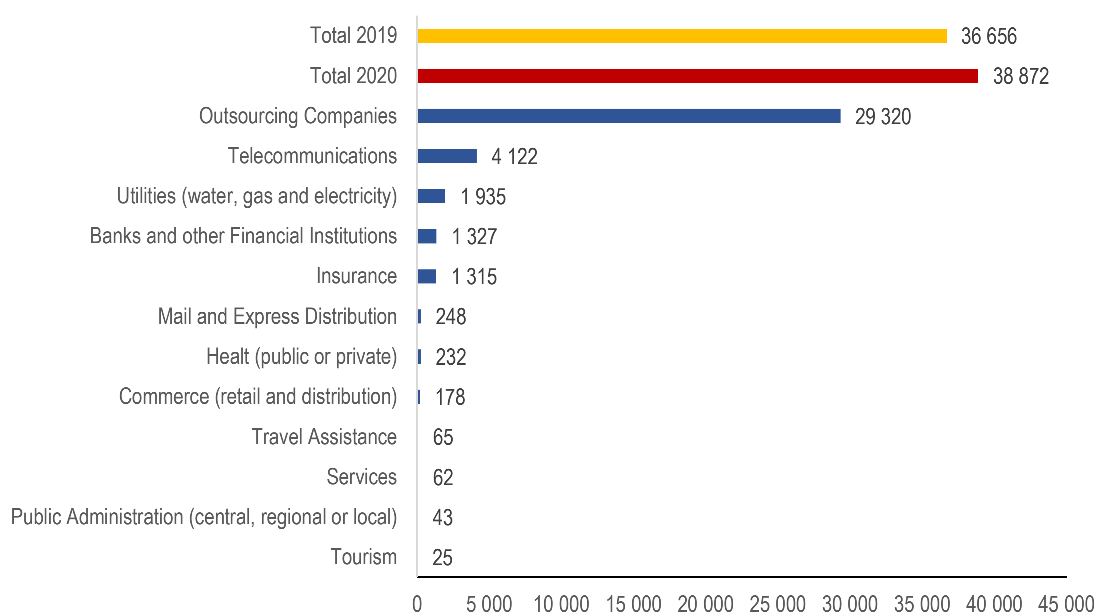


QUESTION: What is the average number of Full Time Equivalents, in 2020, allocated to Inbound and Outbound?

COMMENT: The total number of FTE in the sample increased by about 6% compared to 2019 (38,872 instead of 36,656), and this increase should be interpreted taking into account the increase in the number of responses to this year's Study. Thus, given that the increase in the number of Human Resources was 3%, it is possible to conclude that there was an increase in the workload of some employees. The 3 sectors with the highest number of Full Time Equivalents remained in relation to 2019 and 2018: Outsourcing Companies (29,320), Telecommunications (4,122) and Utilities (1,935).

FIGURE 9

NUMBER OF FULL TIME EQUIVALENTS (N=842**)**

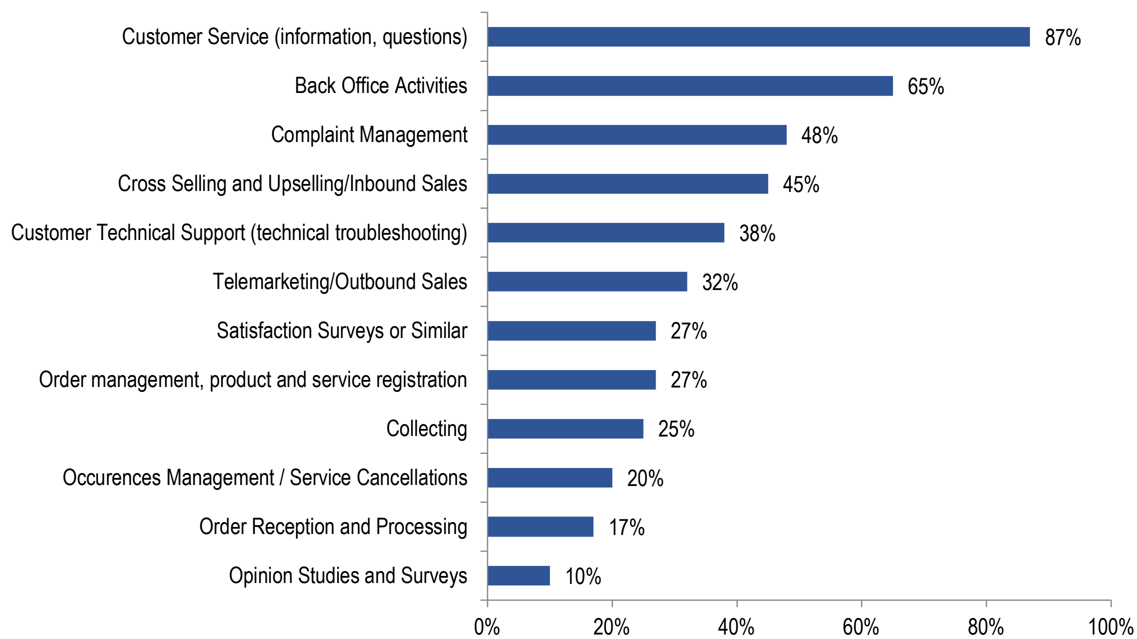


QUESTION: What are the main functions of the Contact Center?

COMMENT: Customer Service remains the main function of Contact Centers (87%), with a significant increase in the second most common function, Back Office Activities, which went from 44% to 65%. The percentage of all other functions rose compared to 2019, with the exception of Telemarketing/Outbound Sales (32% instead of 36%) and Order Management (17% instead of 18%), which recorded a slight drop.

FIGURE 10

WHAT ARE THE MAIN FUNCTIONS OF THE CONTACT CENTER? (N=932)

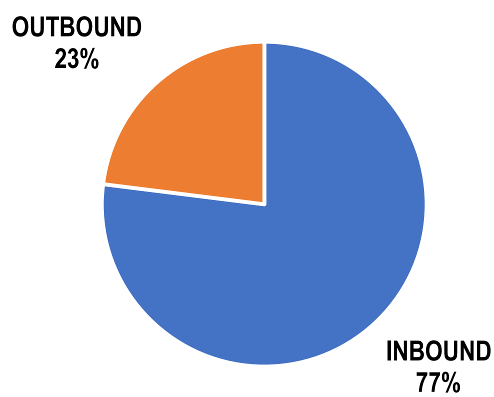


2 Operational Performance

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

COMMENT: Contrary to the trend observed in 2019, in 2020 the percentage of Inbound calls rose 7 percentage points (77% instead of 70%).

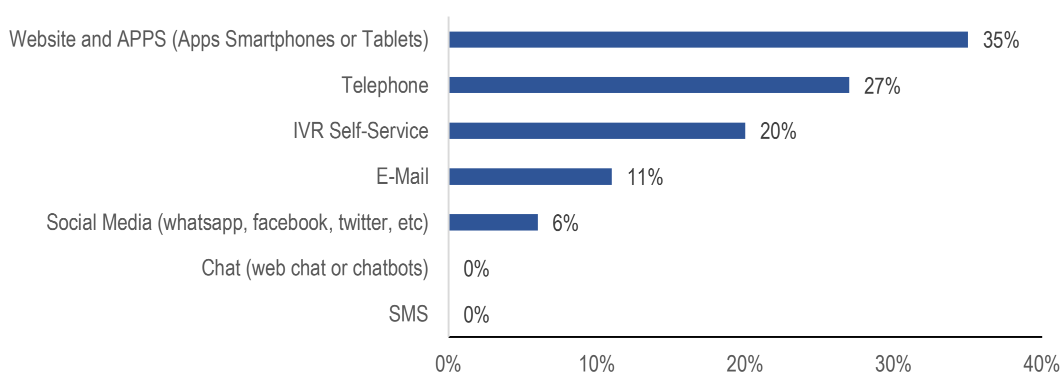
FIGURE 11
INBOUND Vs. OUTBOUND CONTACTS (N=932)



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

COMMENT: The total number of Inbound contacts across different channels increased by 48% compared to 2019 (2,131,905 instead of 1,438,287). The distribution of the average number of Inbound contacts per channel has also changed significantly, as websites and APPS have become the channel with the highest percentage of Inbound contacts (35% instead of 9%), surpassing Telephone, has decreased from 45% to 27%.

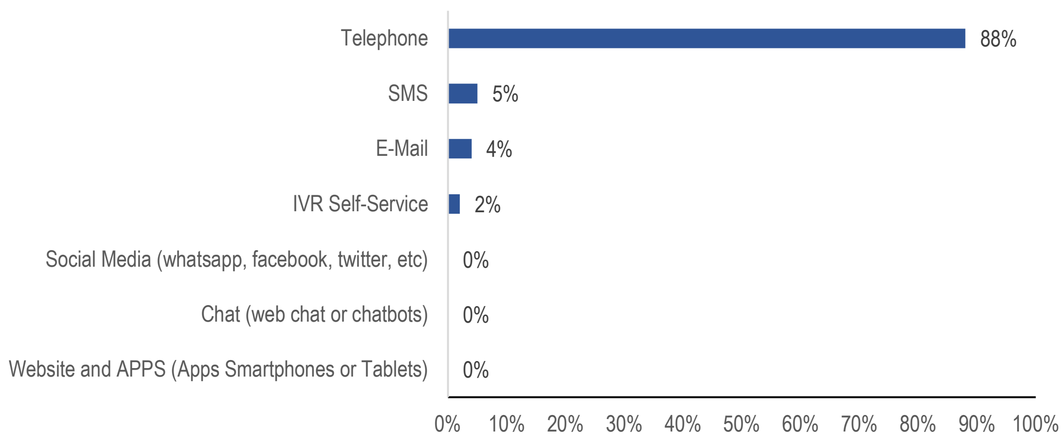
FIGURE 12
DISTRIBUTION OF INBOUND CONTACTS (N=660)



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

COMMENT: The average number of Outbound contacts per day decreased by about 23% compared to 2019 (263,443 instead of 340,235). In relation to Outbound channels, the Telephone remains, significantly, the most used channel (88%), followed by the SMS (5%) and E-mail (4%).

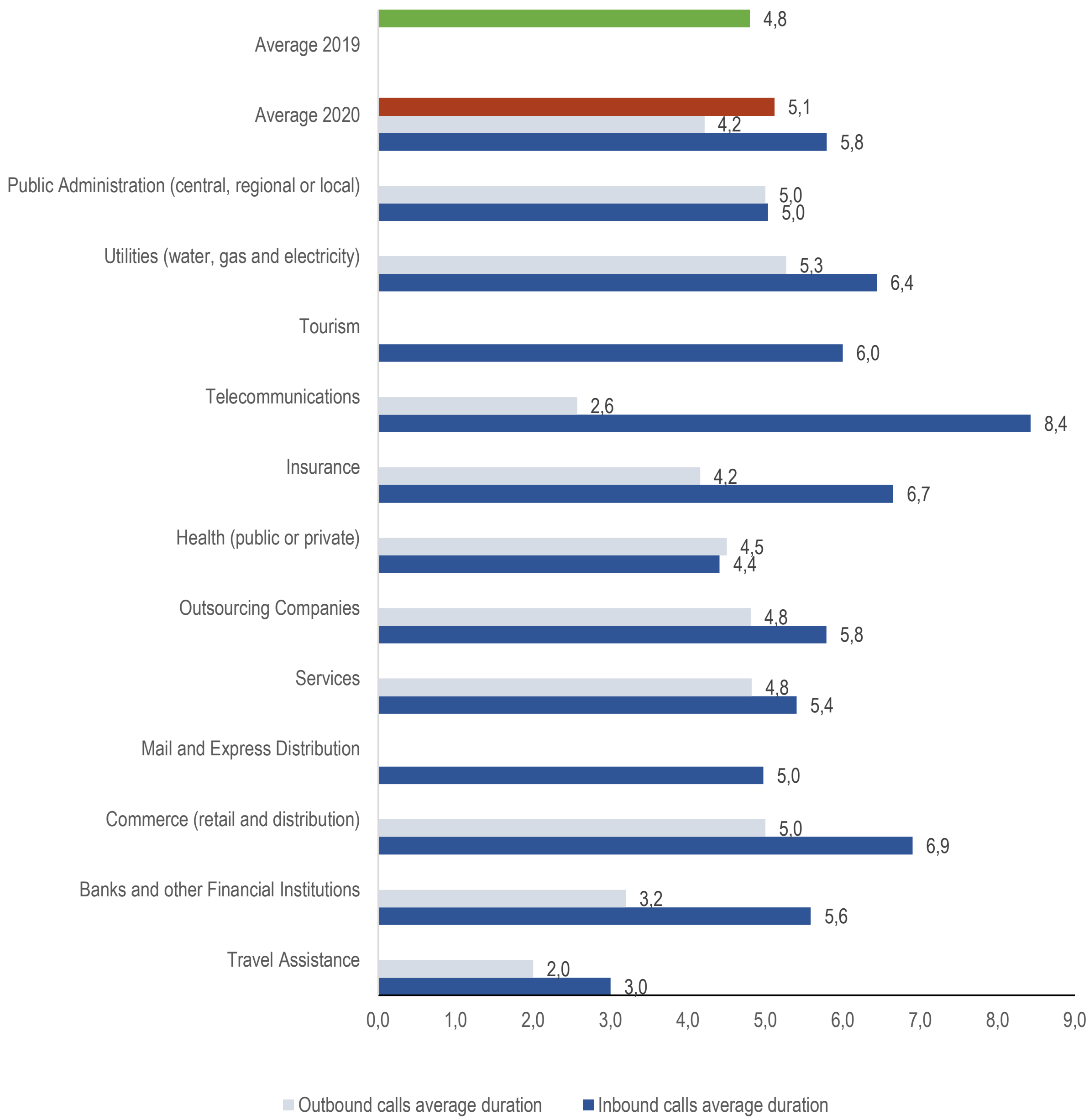
FIGURE 13
DISTRIBUTION OF OUTBOUND CONTACTS (N=514)



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

COMMENT: As verified in the 2019 Study, the average call duration increased again in 2020, from 4.8 to 5.1 minutes. In 2020, Inbound calls had an average duration of 5.8 minutes and Outbound calls of 4.2 minutes. In relation to Inbound, the sectors that recorded the highest average call duration were Telecommunications (8.4) and Commerce (6.9), while the lowest times were achieved in the Travel Assistance (3.0) and Health (4.4) sectors. Regarding Outbound, the sectors with the highest call duration were Utilities (5.3), Public Administration and Commerce (both with 5.0), with the shortest times being recorded in the Travel Assistance (2.0) and Telecommunications (2.6) sectors.

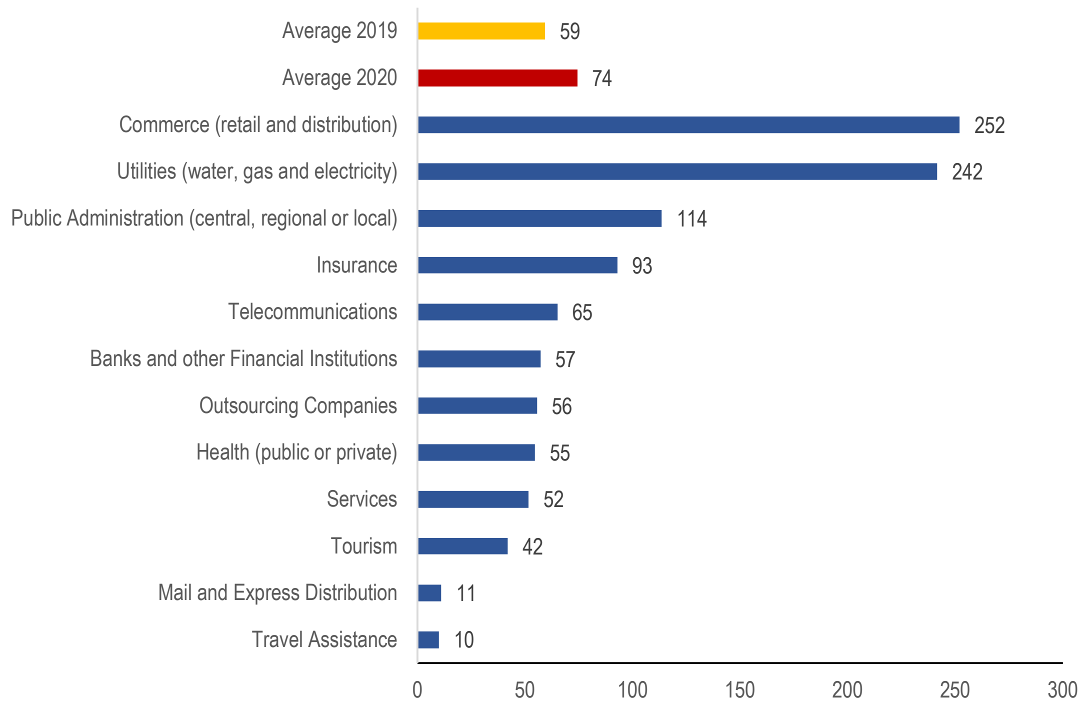
FIGURE 14
AVERAGE HANDLING TIME (MINUTES) (N=932)



QUESTION: What is the average on hold time?

COMMENT: For the third consecutive year the time on hold recorded a negative evolution, rising this year from 59 seconds to 74 seconds. The sectors that performed less well were Commerce (252 seconds) and Utilities (242 seconds). The Travel Assistance and Mail and Express Distribution sectors showed a significant improvement, from 34 and 39 seconds to 10 and 11 seconds, respectively.

FIGURE 15
AVERAGE TIME "ON HOLD" (SECONDS) (N=598)

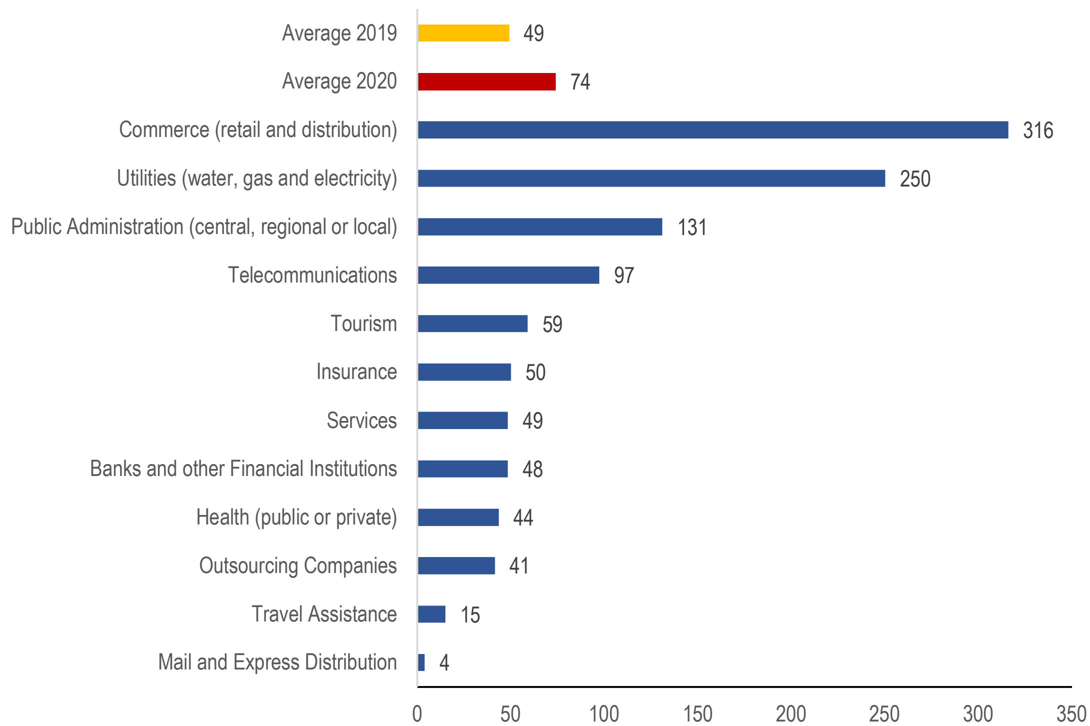


QUESTION: What is the average waiting time to be attended by the Contact Center?

COMMENT: Contrary to the improvement seen in 2019, the average waiting time to be attended by the Contact Center has evolved negatively, from 49 seconds to 74 seconds. The sectors with the highest waiting time were Commerce (316 seconds) and Utilities (250). The sectors with the shortest waiting time were the Mail and Express Distribution (4 seconds) and Travel Assistance (15).

FIGURE 16

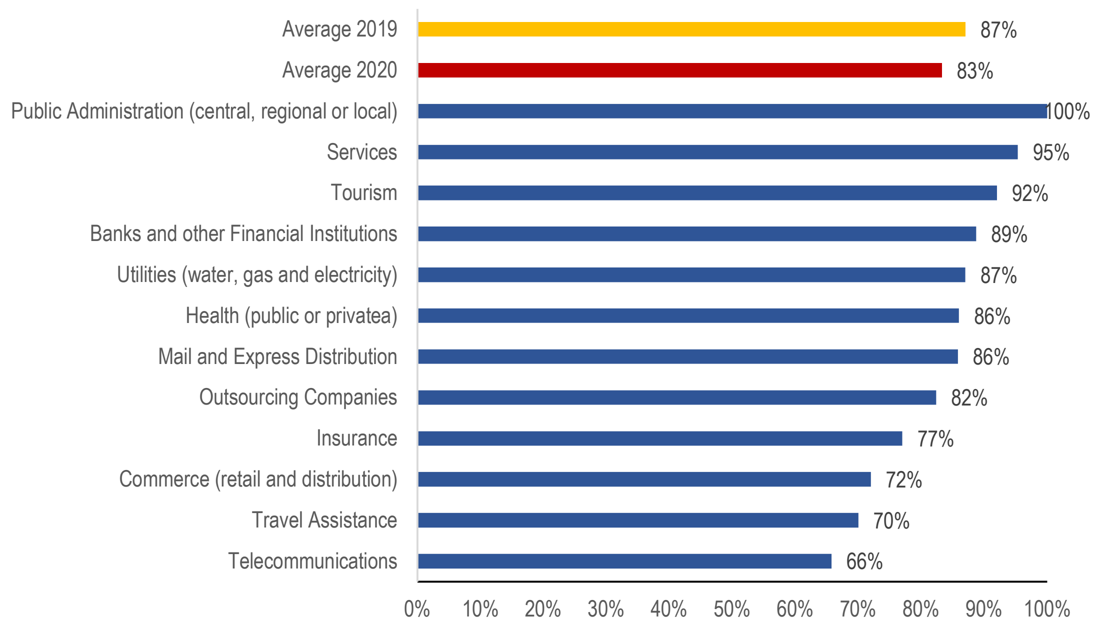
AVERAGE WAITING TIME TO BE ATTENDED BY THE CONTACT CENTER (SECONDS) (N=728)



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

COMMENT: The average first contact resolution rate dropped 4 percentage points from 2019, placing at 83%. In 2020, the sector with the best performance was the Public Administration (100%). The Telecommunications sector recorded a significant drop in the first contact resolution rate evolving from 82% to 66% in 2020, potentially related to the pressure to which Operators were subject given the number of people working from home as a result of the pandemic.

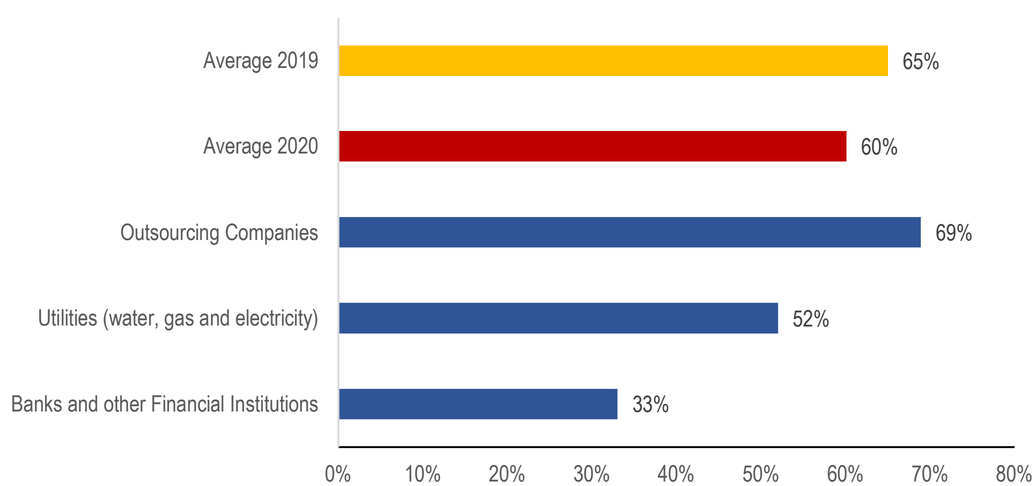
FIGURE 17
FIRST CONTACT RESOLUTION RATE (N=706)



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

COMMENT: The success of Inbound retention calls declined from the previous year, evolving from 65% to 60% in 2020. The best performance occurred in the Outsourcing Companies (69%) and the lowest value in Banks and other Financial Institutions (33%).

FIGURE 18
SUCCESS RATE OF INBOUND RETENTION CALLS (N=122)

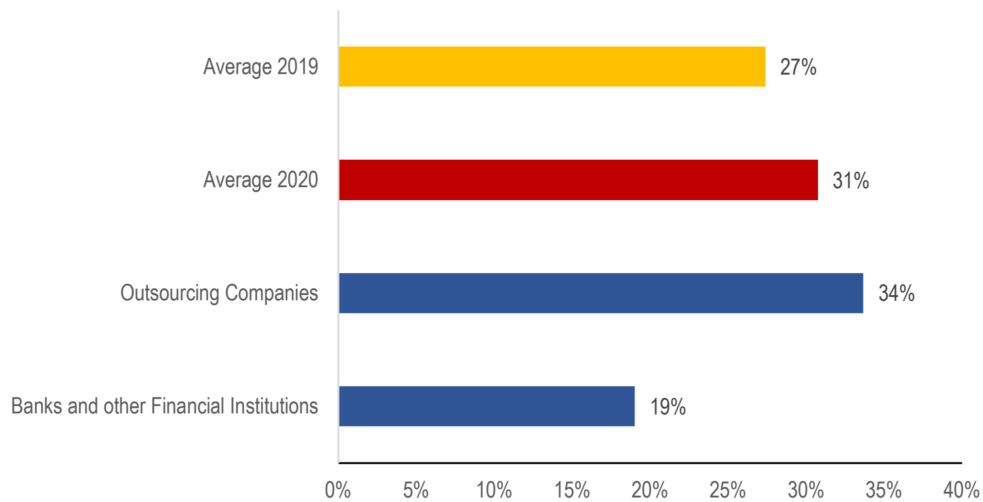


QUESTION: What is the success percentage of Outbound retention calls?

COMMENT: Contrary to the negative evolution observed in the previous Study, the percentage of success in so-called Outbound retention recorded an increase of 4 percentage points in 2020 (27% to 31%). The sector with the best performance was Outsourcing Companies (34%) the sector with the lowest performance Banks and other Financial Institutions (19%).

FIGURE 19

SUCCESS RATE OF OUTBOUND RETENTION CALLS (N=117**)**

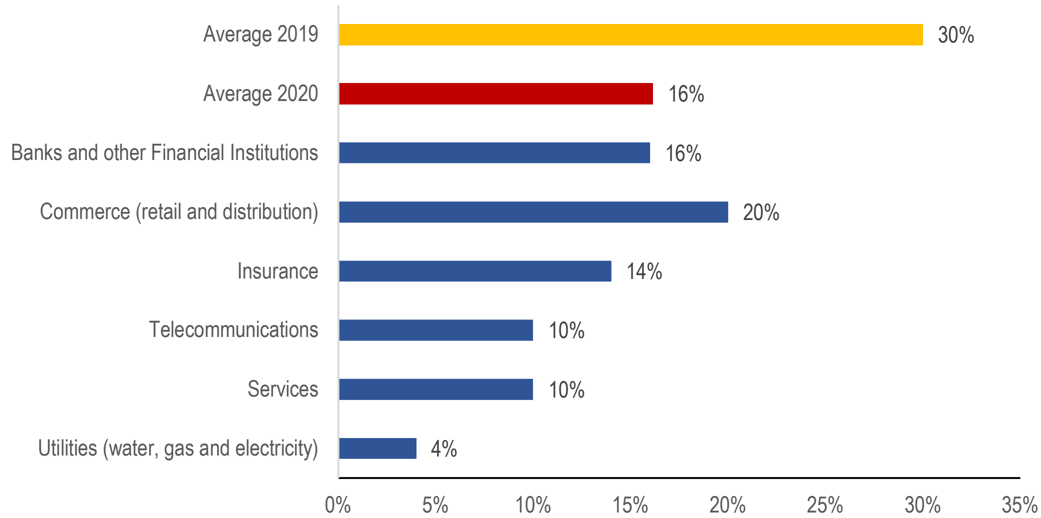


QUESTION: What is the success percentage of "sales" in Outbound calls?

COMMENT: After the growth evidenced in the percentage of success of "sales" in the so-called Outbound over the last two years, in 2020 there was a drop of 14 percentage points compared to 2019 (16% instead of 30%). The best performing sectors were Banks and other Financial Institutions (26%) and Commerce (20%), while the sector with the worst performance was Utilities (4%).

FIGURE 20

SUCCESS PERCENTAGE OF SALES ON OUTBOUND CALLS (N=123)

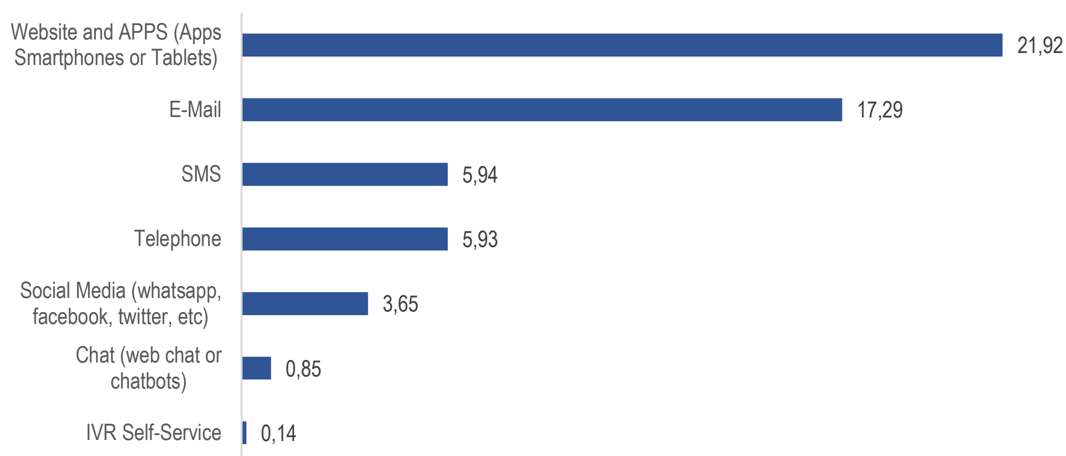


QUESTION: What is the average request resolution time, excluding complaints, per channel?

COMMENT: As verified in 2019, website (21.91 hours) and E-mail (17.29 hours) channels remain the channels with the highest average resolution time. The channels with the lowest average resolution time in 2020 were the Self-Service IVR (0.14 hours) and Chatbot (0.85 hours).

FIGURE 21

REQUESTS AVERAGE RESOLUTION TIME (IN HOURS), PER CHANEL (exluding complains) (N=779)

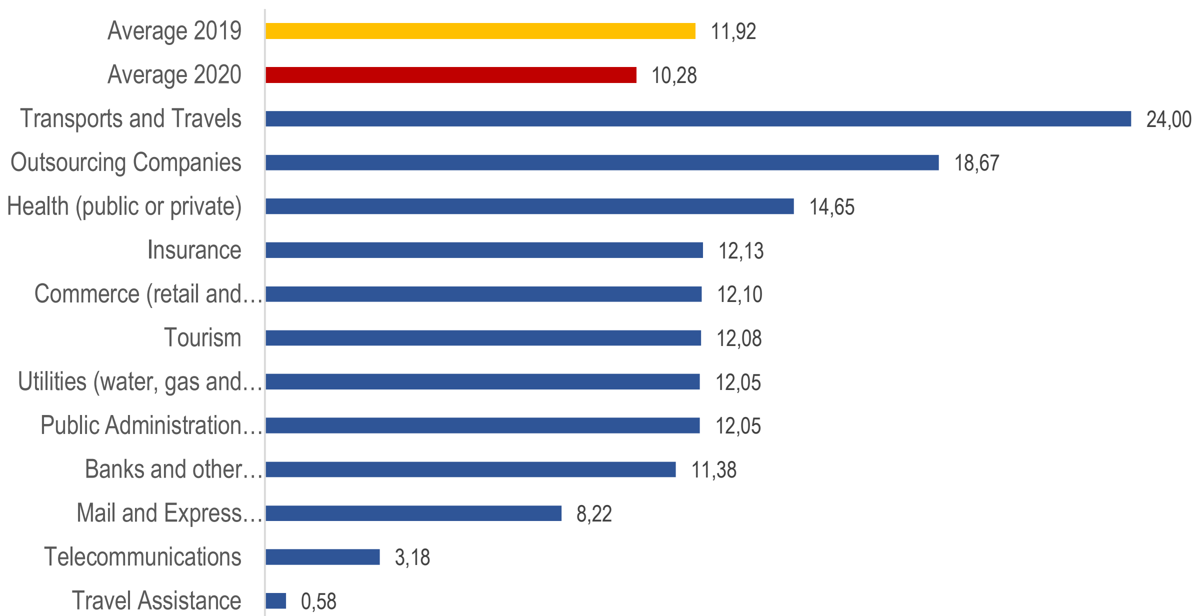


QUESTION: What is the average request resolution time, excluding complaints, by sector?

COMMENT: Following the trend observed in 2019, the average request resolution time decreased, from 11.92 hours to 10.28 hours. The sectors with the shortest request resolution time were Travel Assistance (0.58 hours) and Telecommunications (3.19 hours). On the other hand, the sectors that recorded the worst performance in this metric were Outsourcing Companies (18.67 hours) and Transports and Travels (24 hours).

FIGURE 22

REQUESTS AVERAGE RESOLUTION TIME (IN HOURS), BY SECTOR (excluding complaints)
(N=392)



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

COMMENT: In relation to 2019, this indicator has evolved positively, the average resolution time of complaints decreased from 3 days to 1.8. The Telecommunications and Mail and Express Distribution sectors evolved positively, from 4.09 and 4 days to 2.72 and 2.73 days, respectively. The sector with the worst performance was Utilities, with 3.62 days. As for channels, websites and APPS performed the worst (3.17 days), while Chat and Telephone performed the best (1.34 and 1.55 days respectively).

FIGURE 23

COMPLAINTS AVERAGE RESOLUTION TIME (DAYS) (N=276)

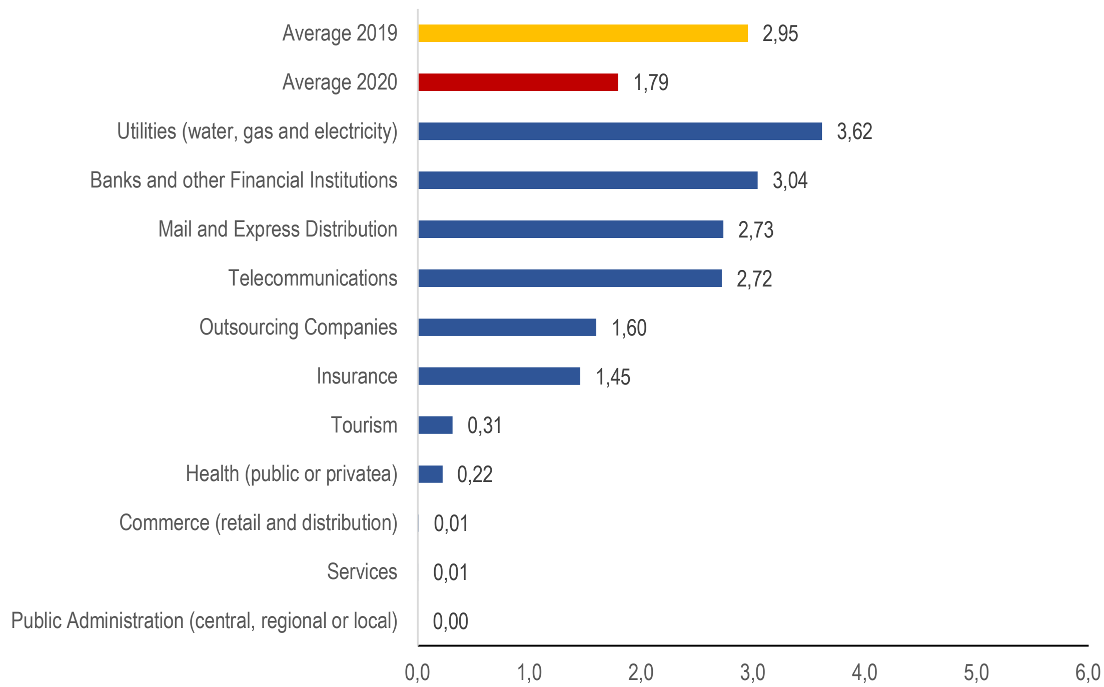
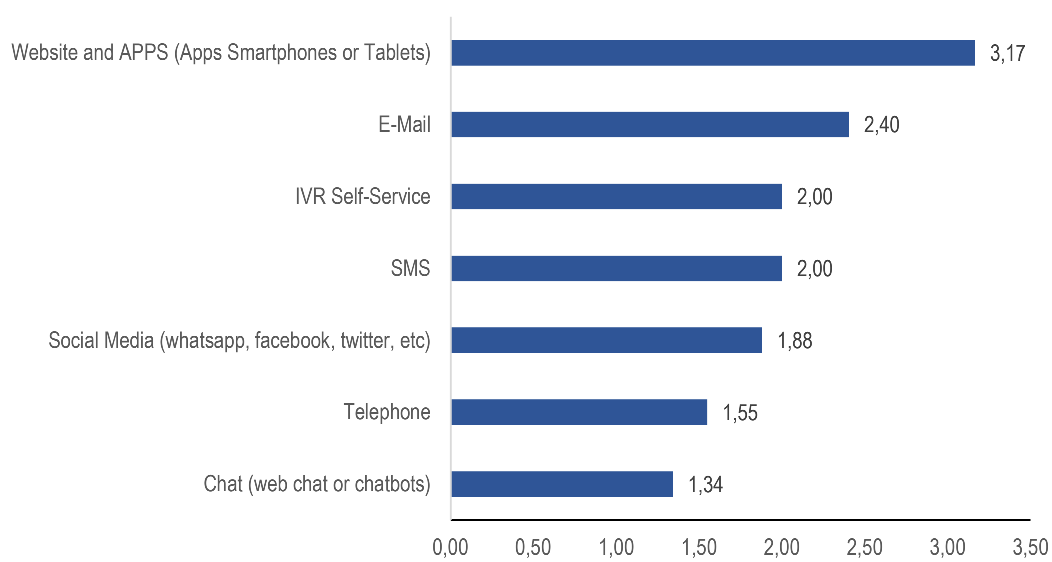


FIGURE 24

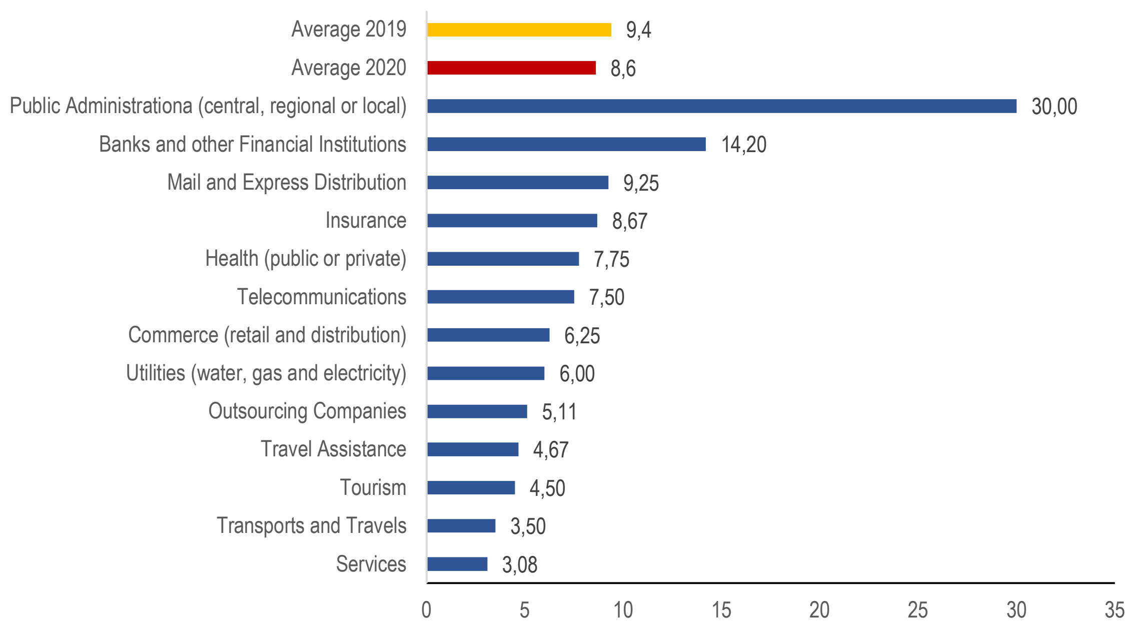
COMPLAINTS AVERAGE RESOLUTION TIME, PER CHANNEL (DAYS) (N=276)



QUESTION: What is the average number of written requests answered by Operator per hour?
COMMENT: On average, each Operator responds to 8.6 written requests per hour, a value lower than in 2019 (9.4). The Public Administration sector stands out from the rest by recording an average number of 30 written requests answered per Operator per hour.

FIGURE 25

AVERAGE NUMBER OF WRITTEN REQUESTS ANSWERED PER OPERATOR PER HOUR AND SECTOR OF ACTIVITY (N=719)

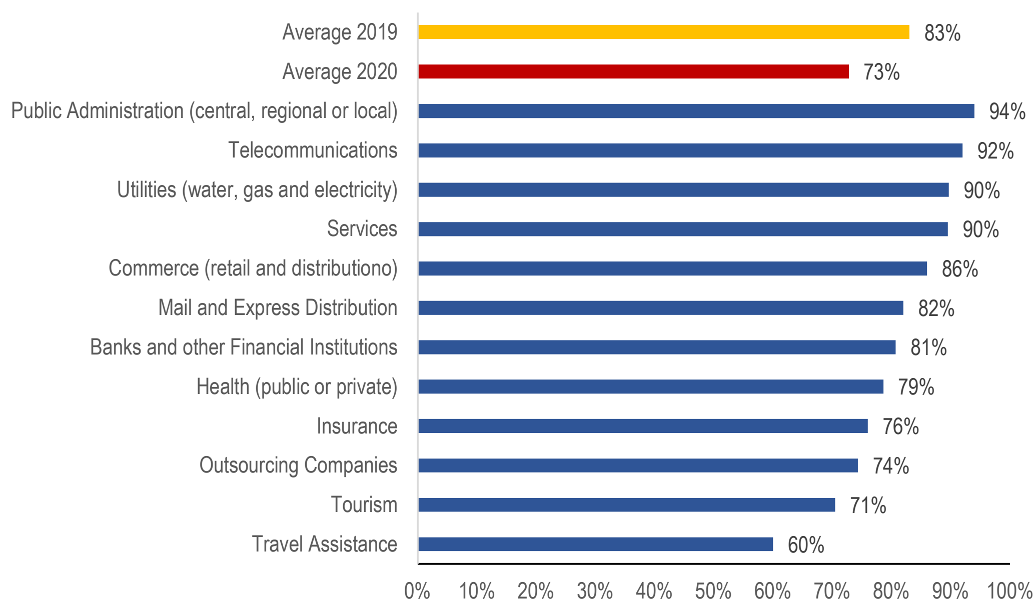


3 Human Resources

QUESTION: What is the average resource occupancy rate in 2020?

COMMENT: The average resource occupancy rate fell from 83% to 73% in 2020. The sectors that recorded higher occupancy rates were the Public Administration (94%) and Telecommunications (92%). The Travel Assistance sector (60%) was the one with a lower occupancy rate.

FIGURE 26
AVERAGE RESOURCES OCCUPANCY RATE (N= 883)

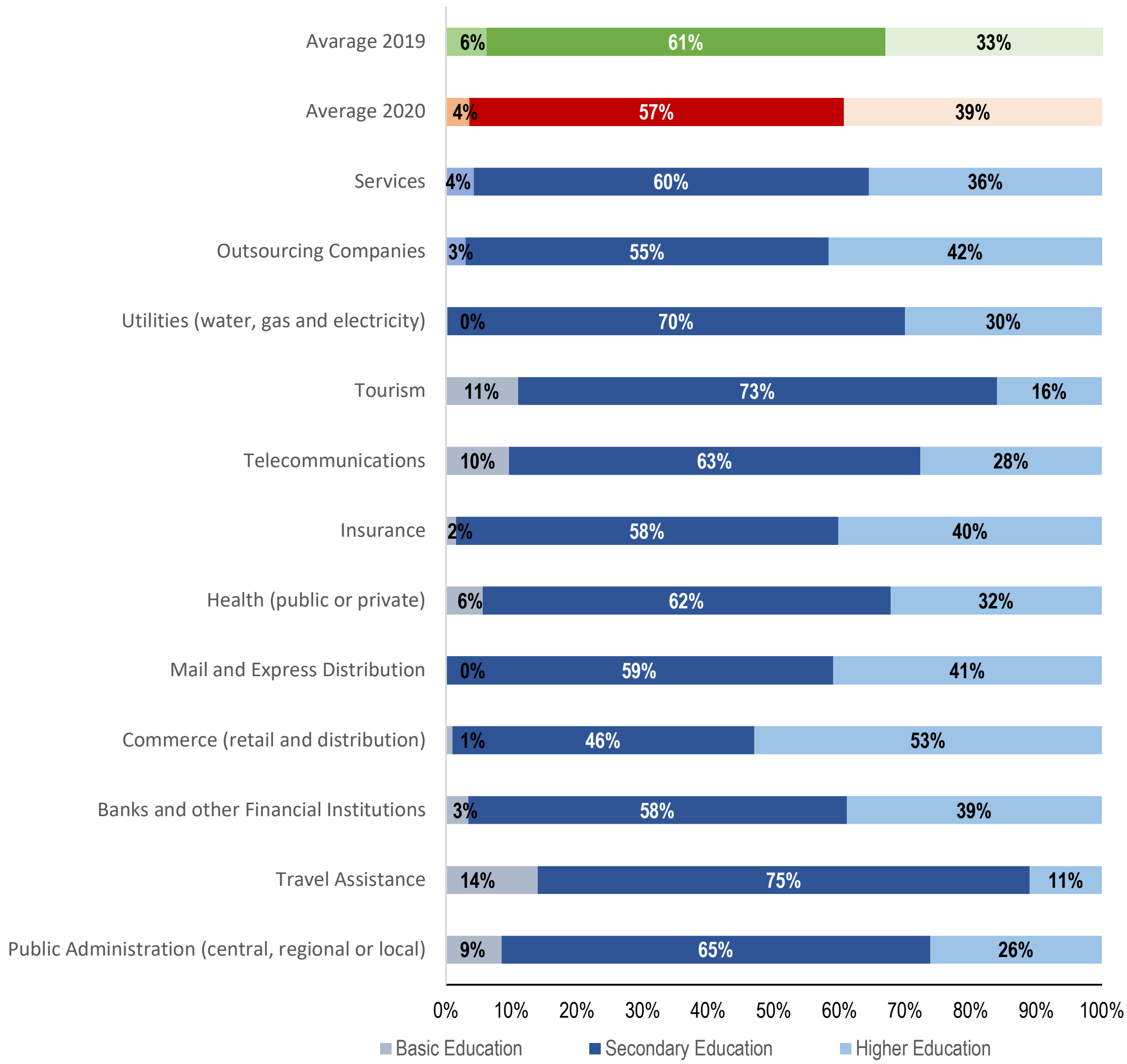


QUESTION: What is the distribution of employees by level of education?

COMMENT: In general, the distribution values of employees by educational level remain similar to 2019 with some changes, with 39% of university degree, 57% at secondary level (below 61% observed in 2019) and only 4% with the basic level (slightly below the 6% observed in 2019). The sectors in which there is a higher percentage of employees with university degree are the Commerce (53%), Outsourcing Companies (42%) and Mail and Express Distribution (41%) sectors. With regard to basic training, the Travel Assistance sectors (14%) and Tourism (11%) are the sectors with the highest representativeness in the distribution by this level of education.

FIGURE 27

DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY LEVEL OF EDUCATION (N=927)



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

COMMENTS: 67% of respondents indicate that they conduct satisfaction surveys to their employees on a mostly annual basis. Regarding the average classification obtained, there was an increase in relation to 2019 (82% instead of 76%). The sectors that recorded the most positive evaluations were the Mail and Express Distribution (93%) and Commerce (87%). The Tourism sector (64%) recorded the less positive evaluation.

FIGURE 28

Are employee satisfaction surveys conducted? (N=927)

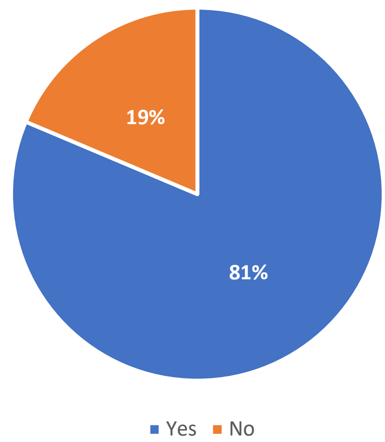


FIGURE 29

What is the frequency of employee satisfaction surveys? (N=638)

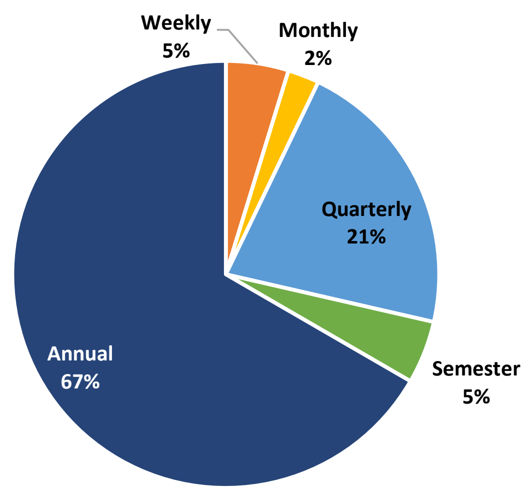
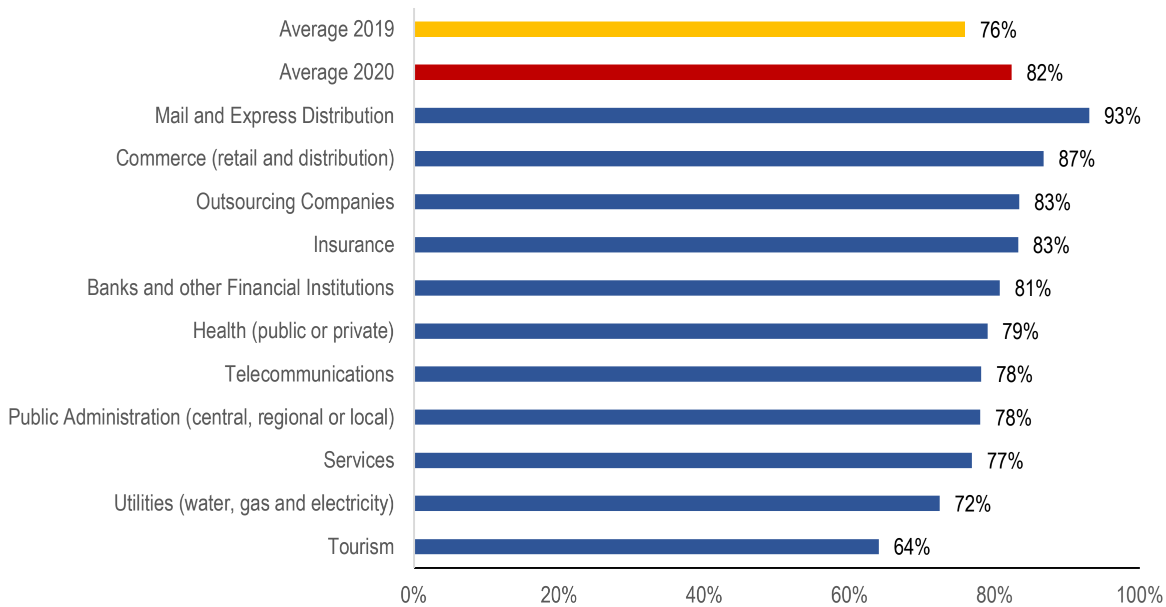


FIGURE 30

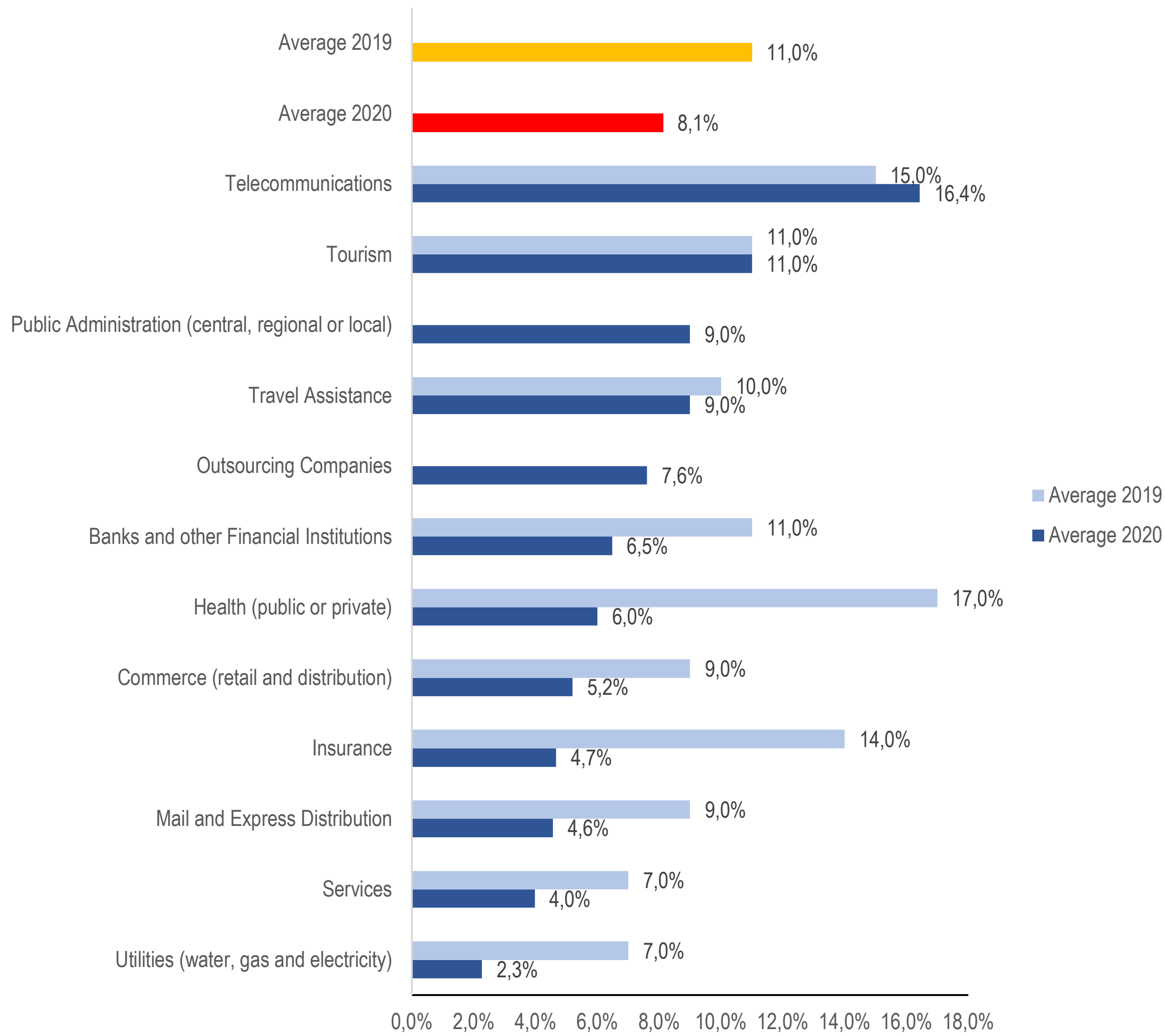
RATING ACHIEVED ON EMPLOYEES' SATISFACTION SURVEYS (N=466)



QUESTION: What is the average absenteeism rate for Operators in 2020?

COMMENT: In view of the previous study, the absenteeism rate decreased by 3 percentage points, with an average of 8% in 2020. The sector of activity with the highest absenteeism rate was Telecommunications (16%), the sector with the lowest absenteeism rate, was Utilities (2%). Overall, the absenteeism rate decreased in all sectors except for Tourism which (maintained 11%) and Telecommunications that increased (15% to 16%).

FIGURE 31
OPERATORS AVERAGE ABSENTEEISM RATE (N=927)

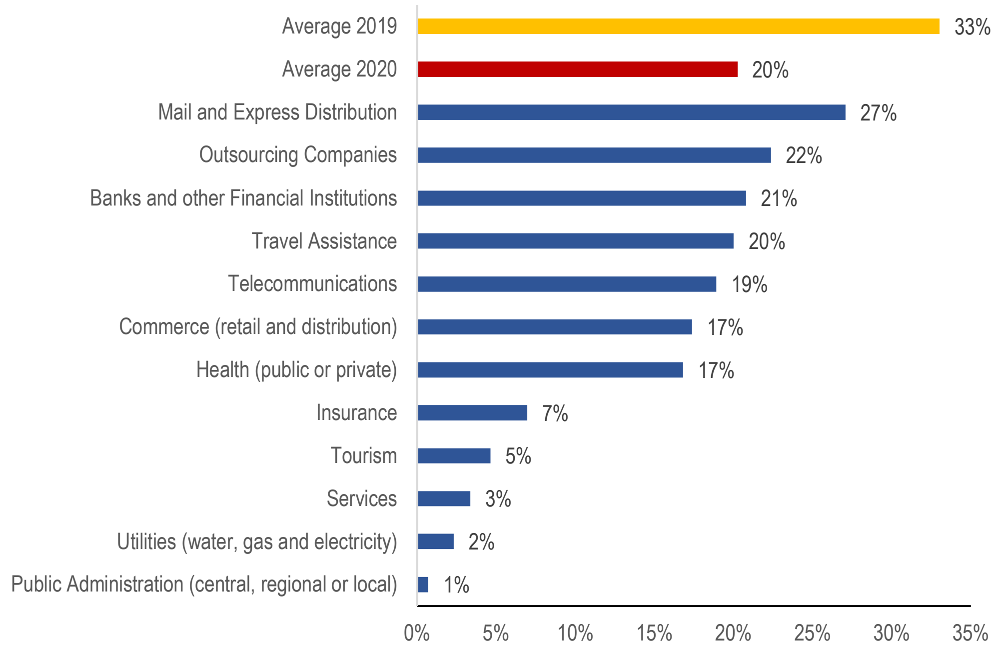


QUESTION: What is the rotation rate for Operators in 2020?

COMMENT: Operators' rotation rate decreased from 33% to 20% in 2020. Mail and Express Distribution (27%) and Outsourcing Companies (22%) recorded the highest rotation values. The Public Administration sector stands out in relation to the sample with a rotation rate of 1%.

FIGURE 32

OPERATORS ROTATION RATE (N=927)

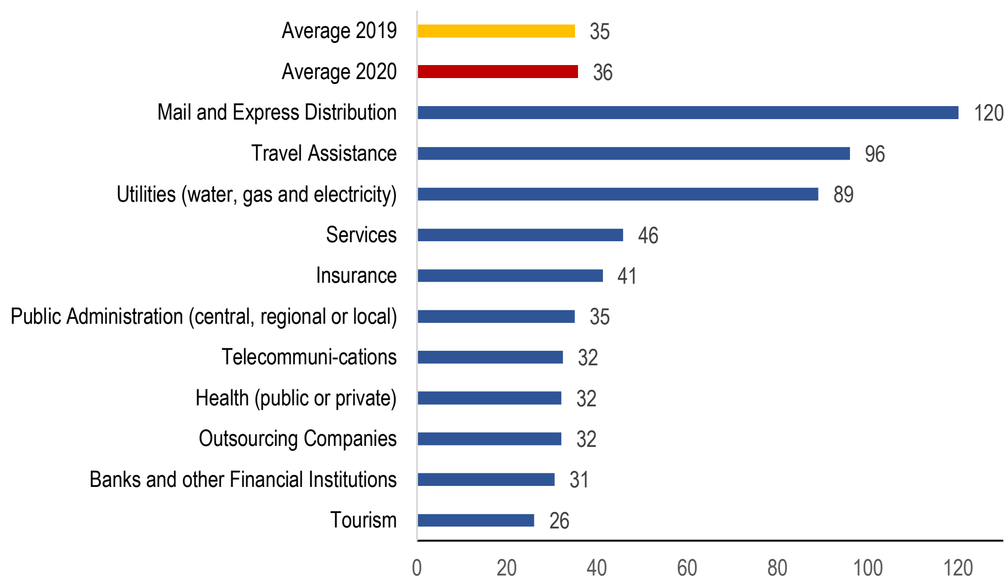


QUESTION: What is the average seniority of the Operators?

COMMENT: Operators' average seniority increased from 35 to 36 months compared to 2019, which was expected in view of the decrease in rotation rate. The Mail and Express Distribution sector recorded the highest seniority value (120 months), while Tourism recorded the highest average seniority value (26 months).

FIGURE 33

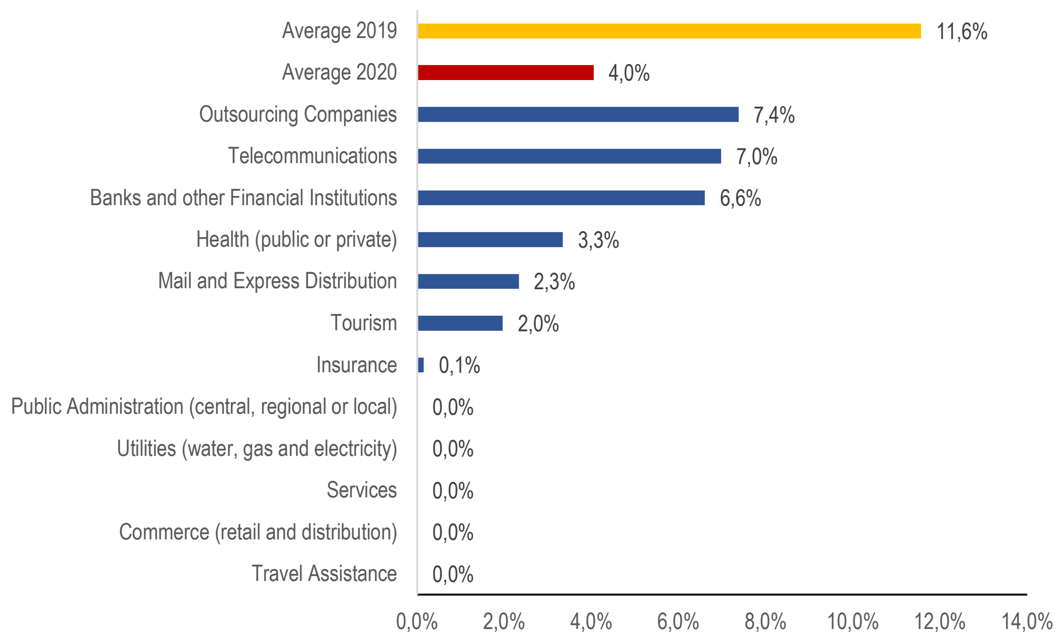
OPERATORS AVERAGE SENIORITY (months) (N=680)



QUESTION: What is the rotation rate of Supervisors in 2020?

COMMENT: As observed in the Operators, the rotation rate of Supervisors also decreased compared to 2019 (from 11.6% to 4%), not following the trend of recent years. The Outsourcing Companies in conjunction with Telecommunications and Banks have a rotation rate of 7%, the highest during 2020.

FIGURE 34
SUPERVISORS ROTATION RATE (N=927)

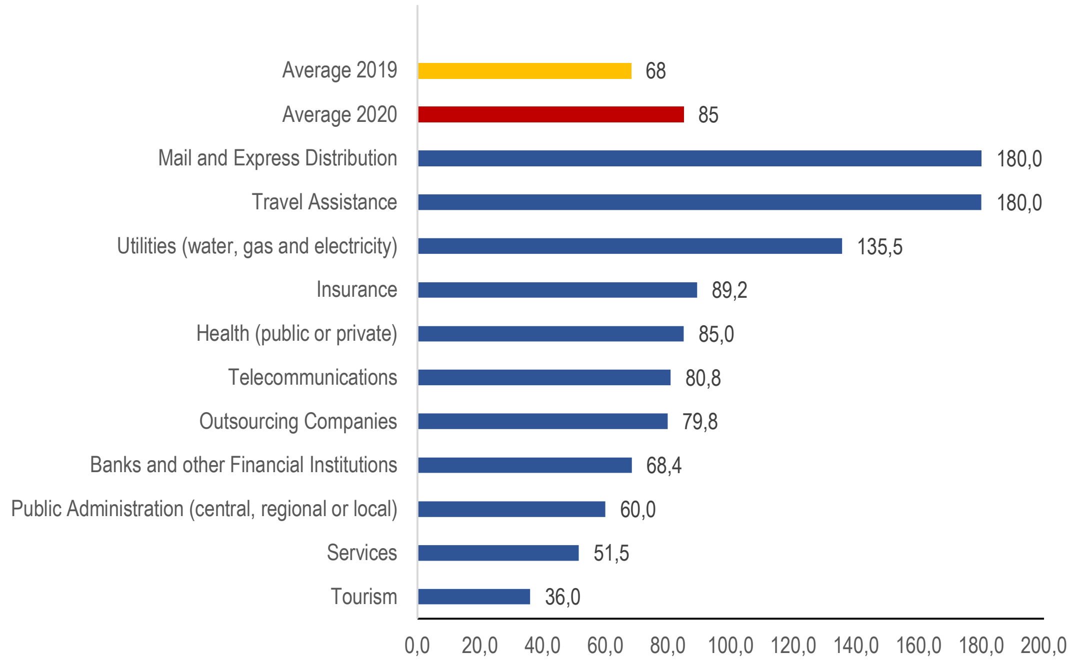


QUESTION: What is the average seniority of the Supervisors?

COMMENT: Following the evolution of the rotation rate, the average seniority of Supervisors increased in relation to 2019 (85 months instead of 68), with the Tourism sector (36 months) presenting a lower average seniority. On the other hand, both the Travel Assistance (180 months) and the Mail and Express Distribution (180 months) present significantly the highest values.

FIGURE 35

SUPERVISORS AVERAGE SENIORITY (months) (N=607**)**

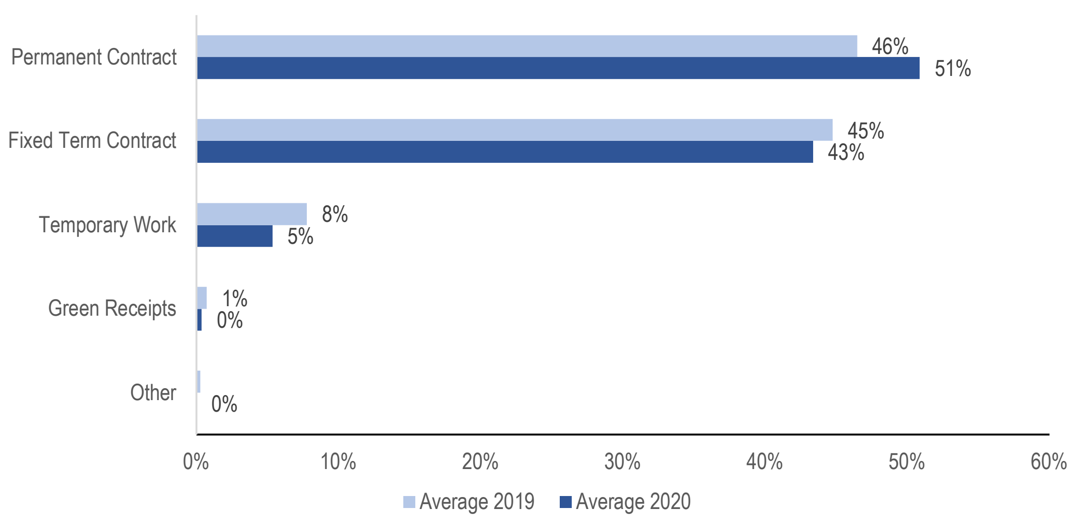


QUESTION: What is the distribution of employees by contractual bond?

COMMENT: This year's results reveal an increase in the percentage of Employees with an effective link (51%) and a decrease in the percentage of employees with term contracts (43%). It is also important to note the decrease in the percentage of employees hired for temporary work (5% instead of 8%).

FIGURE 36

DISTRIBUTION OF CONTACT CENTER EMPLOYEES BY CONTRACTUAL BOND (N=932)

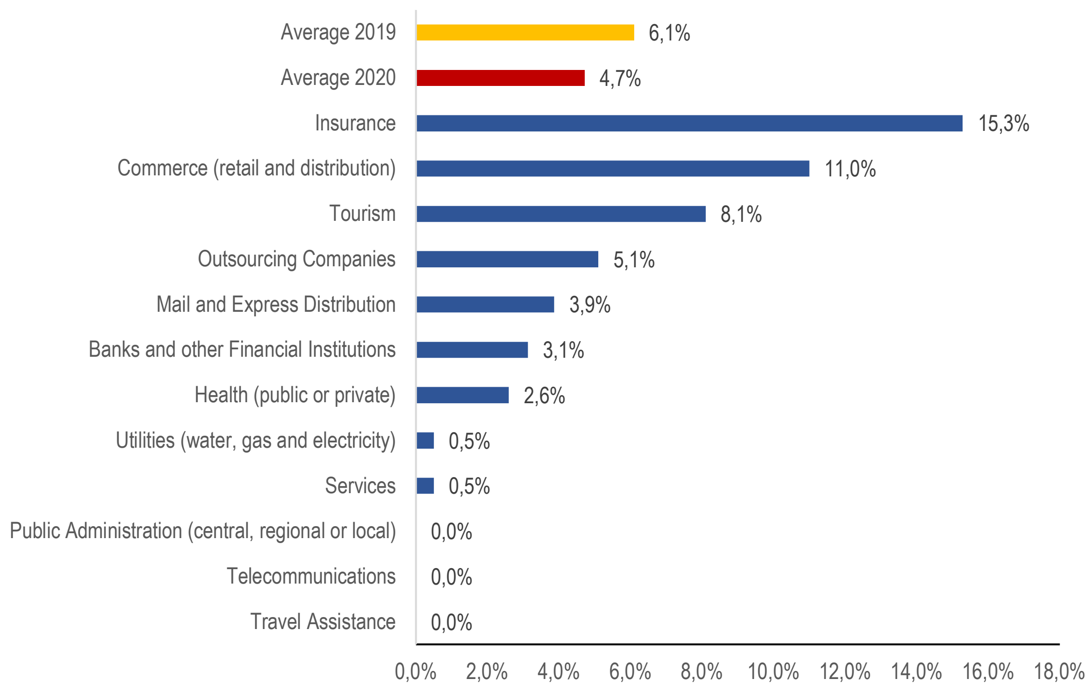


QUESTION: What percentage of Contact Center employees are relocated to other functions within the Organization?

COMMENT: This indicator decreased compared to 2019 (6.1% to 4.7%). The sector in which relocation was most frequent was Insurance (15.3%), and no relocations were observed in the Public Administration, Telecommunications and Travel Assistance sectors.

FIGURE 37

PERCENTAGE OF CONTACT CENTER EMPLOYEES ACCESSING OTHER FUNCTIONS WITHIN THE ORGANIZATION (N=927)

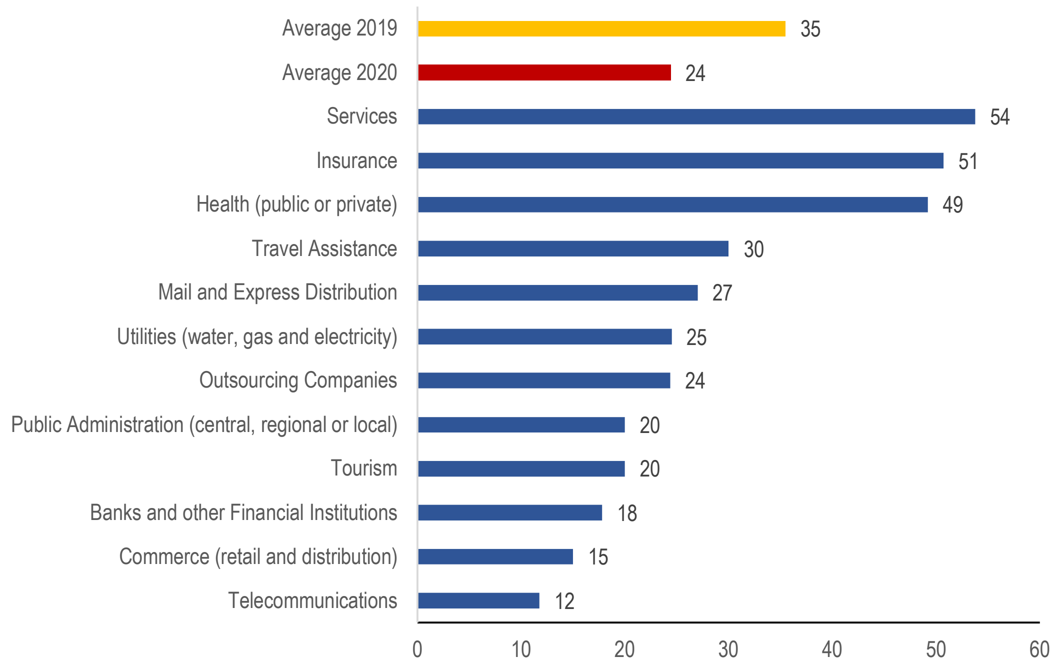


QUESTION: What is the average time needed to train a collaborator who has just entered the Contact Center?

COMMENT: The average initial training time decreased by 2020 (24 days instead of 35). The sector where the highest initial training times were reported was the Services sector (54 days), with the Telecommunications sector being the one with the shortest reported time (12 days).

FIGURE 38

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

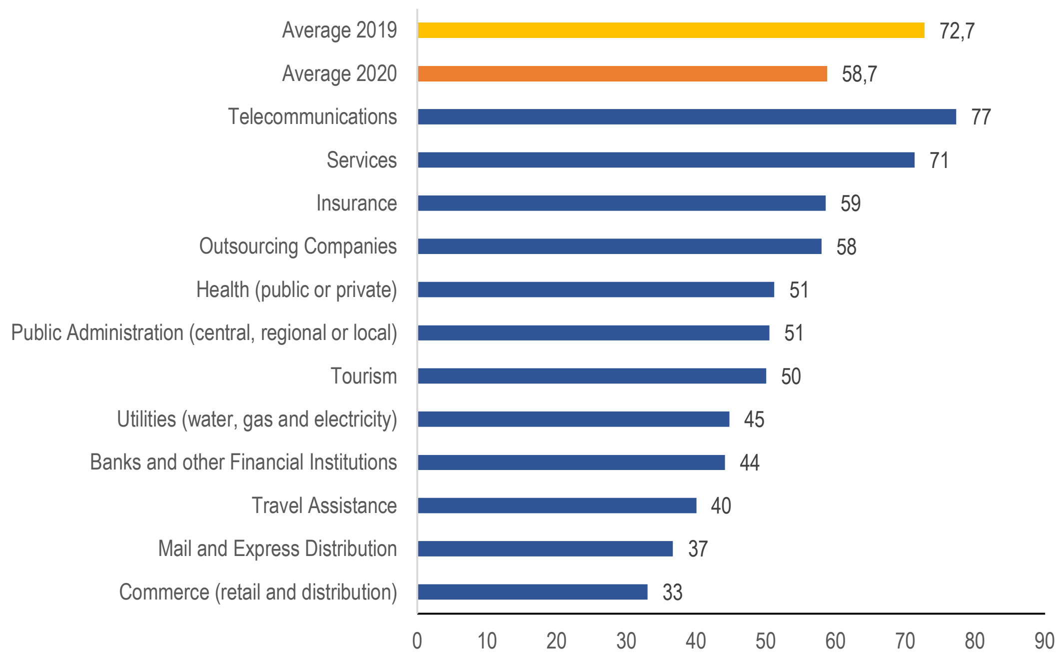


QUESTION: What is the number of annual training hours, including recycling, per Operator?

COMMENT: The number of annual training hours per Operator increased compared to 2019 (58.7 hours instead of 72.7 hours) to values similar to 2018 (57 hours). The sector with the most annual training hours was Telecommunications (77 hours), while the one with the lowest number was the Commerce sector (retail and distribution) (33 hours).

FIGURE 39

HOURS OF ANNUAL TRAINING (PER OPERATOR) (N=927)

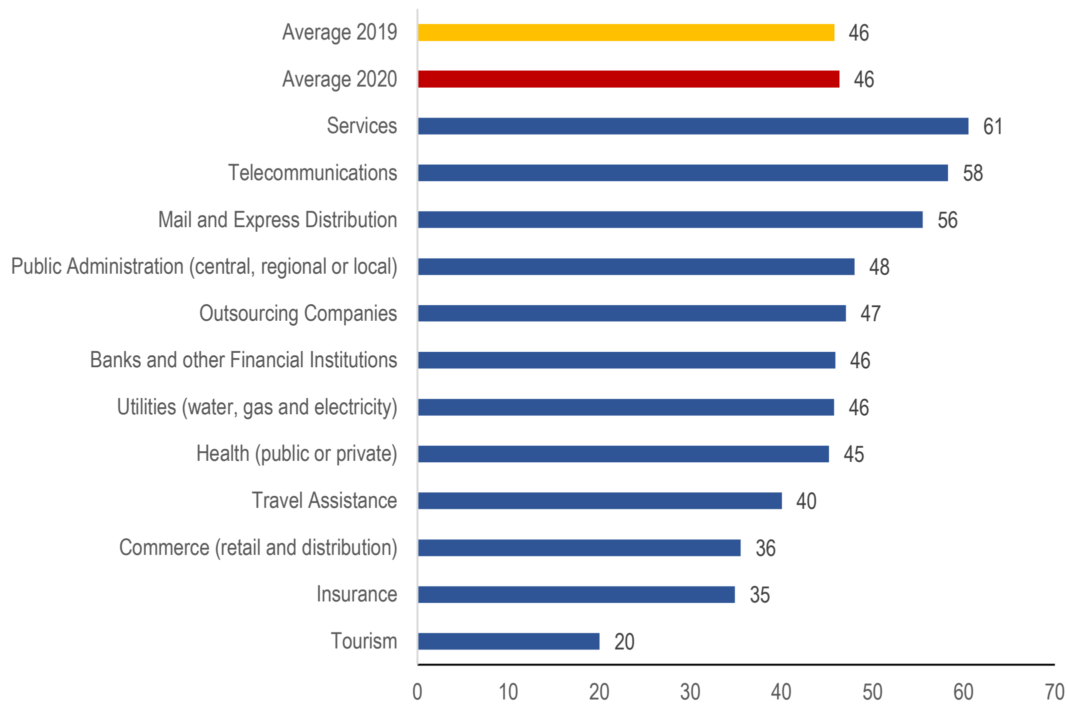


QUESTION: What is the number of annual training hours, including recycling, per Supervisor?

COMMENT: Contrary to what happened with the Operators, the number of training hours for Ssupervisors remained in relation to 2019 (46). The sector with the most hours of training for Supervisors was Services (61), while the Tourism sector recorded the lowest value (20).

FIGURE 40

HOURS OF ANNUAL TRAINING (PER SUPERVISOR) (N=927)



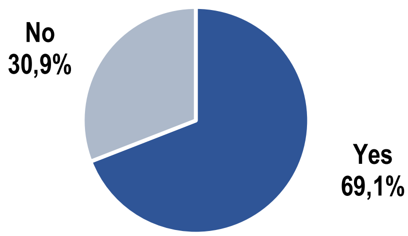
QUESTION: Is there a specific training / accreditation plan / program for Supervisors / Trainers / Quality Experts?

COMMENT: Compared to 2019, there was an increase in the percentage of respondents who claim to have specific training/accreditation plans/programs for Supervisors (69.1% in 2019 to 71.2% in 2020). Regarding the existence of specific training/accreditation plans/programs for Trainers, there was a reduction in the reported percentage, evolving from 71% in 2019 to 66.1% in 2020. About 60.3% of respondents said they have specific training/accreditation programs for Quality Experts, an increase from the value observed in 2019 (55%).

FIGURE 41

2019

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



2020

PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR SUPERVISORS (in 2020)? (N=927)

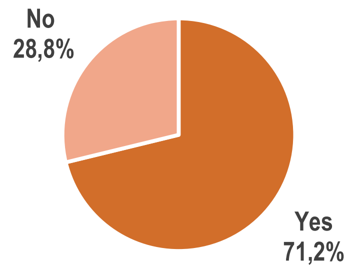
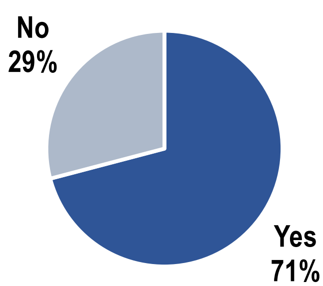


FIGURE 42

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



PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR TRAINERS (in 2020)? (N=927)

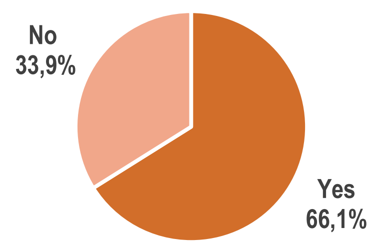
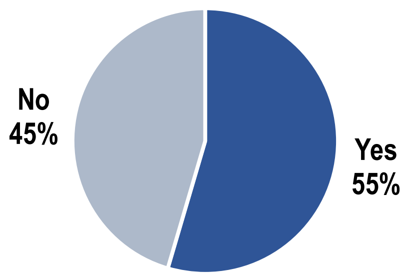
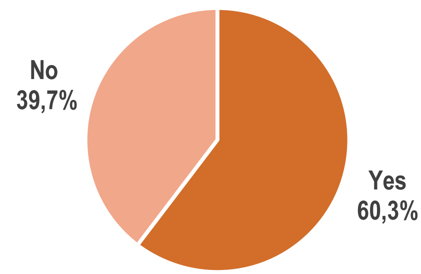


FIGURE 43

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



PLAN/TRAINING PROGRAM/SPECIFIC ACCREDITATION FOR QUALITY EXPERTS (in 2020)? (N=925)

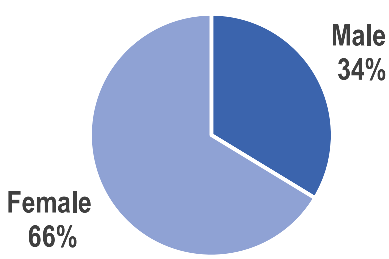


QUESTION: What is the gender distribution of Operators?

COMMENT: The female gender remains the predominant gender of Contact Center employees. Compared to the previous year, there was a 1 percentage point increase in the percentage of female Operators, now representing a percentage of 67%. In relation to Supervisors, the proportion changed compared to the previous year, with the percentage of female Supervisors going from 60% to 68% and male from 40% to 32%.

FIGURE 44

2019
OPERATORS DISTRIBUTION BY GENDER (N=722)



2020
OPERATORS DISTRIBUTION BY GENDER (N= 927)

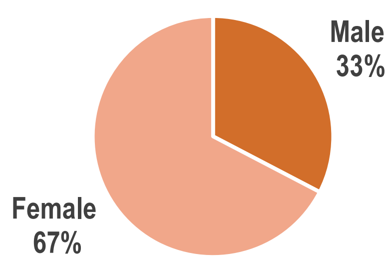
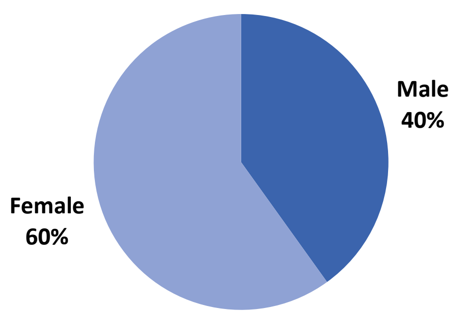
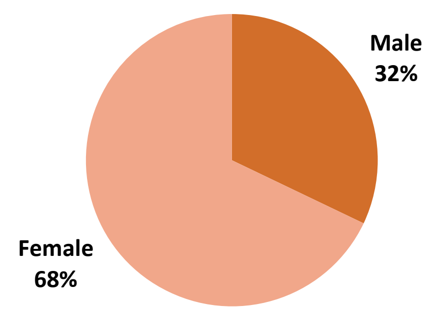


FIGURE 45

SUPERVISORS DISTRIBUTION BY GENDER (N=722)



SUPERVISORS DISTRIBUTION BY GENDER (N= 927)



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

COMMENT: The average age of Contact Center Operators and Supervisors in Portugal is mainly between 25 and 40 years (86.4% and 78.0% respectively), maintaining the average values recorded in the previous year.

FIGURE 46

OPERATORS AVERAGE AGE (2020) (N=927)

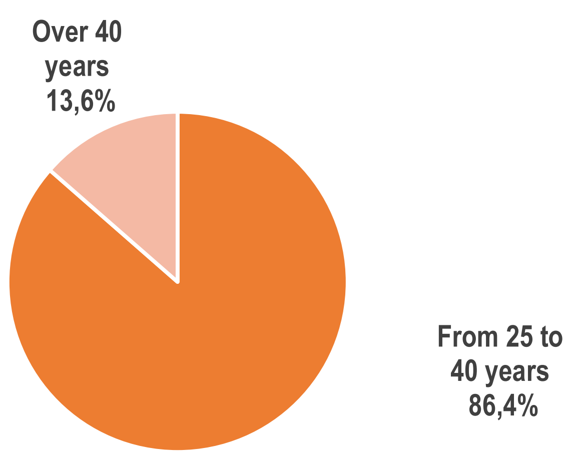
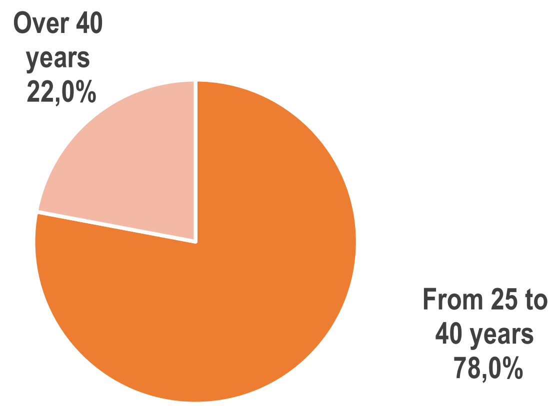


FIGURE 47

SUPERVISORS AVERAGE AGE (2020) (N=927)



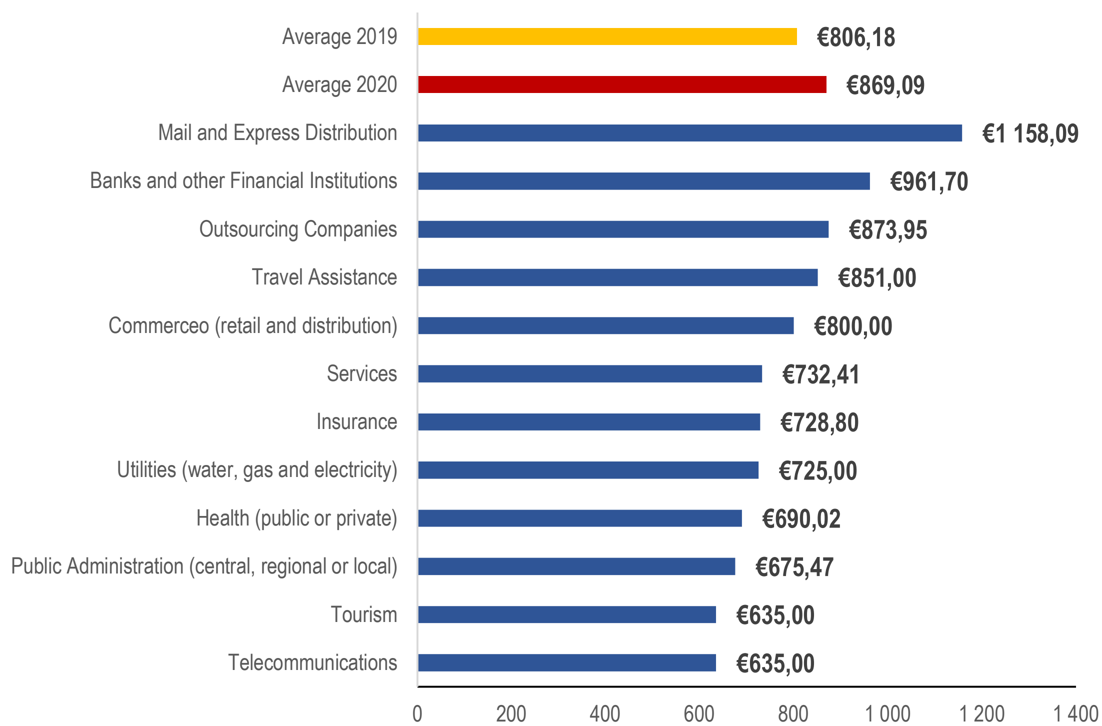
4 Policies and Benefits

QUESTION: What is the Operators average monthly gross salary?

COMMENT: In 2020 the Operators average monthly gross salary increased from 806,18€ to 869,09€. The sector in which the highest salaries were determined was the Mail and Express Distribution sector (1,158€), and the sectors with the lower values were Telecommunications (635€) and Tourism (635€).

FIGURE 48

OPERATORS AVERAGE MONTHLY GROSS SALARY (Euros) (N=855)

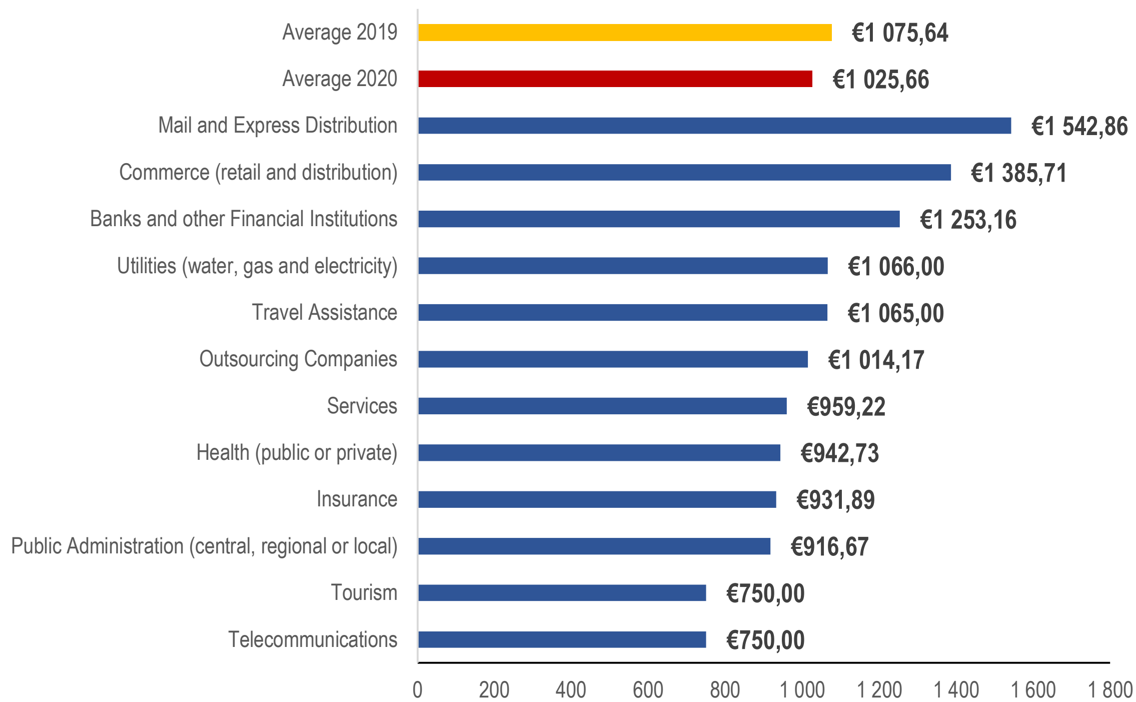


QUESTION: What is the Supervisors' average monthly gross salary?

COMMENT: The Supervisors average salary decreased (from 1.075,64€ to 1025,66€). The sector with the highest was the Mail and Express Distribution (1,543€). The lowest amounts occur in the Telecommunications (750€) and Tourism (750€) sectors.

FIGURE 49

SUPERVISORS AVERAGE MONTHLY GROSS SALARY (Euros) (N=855)

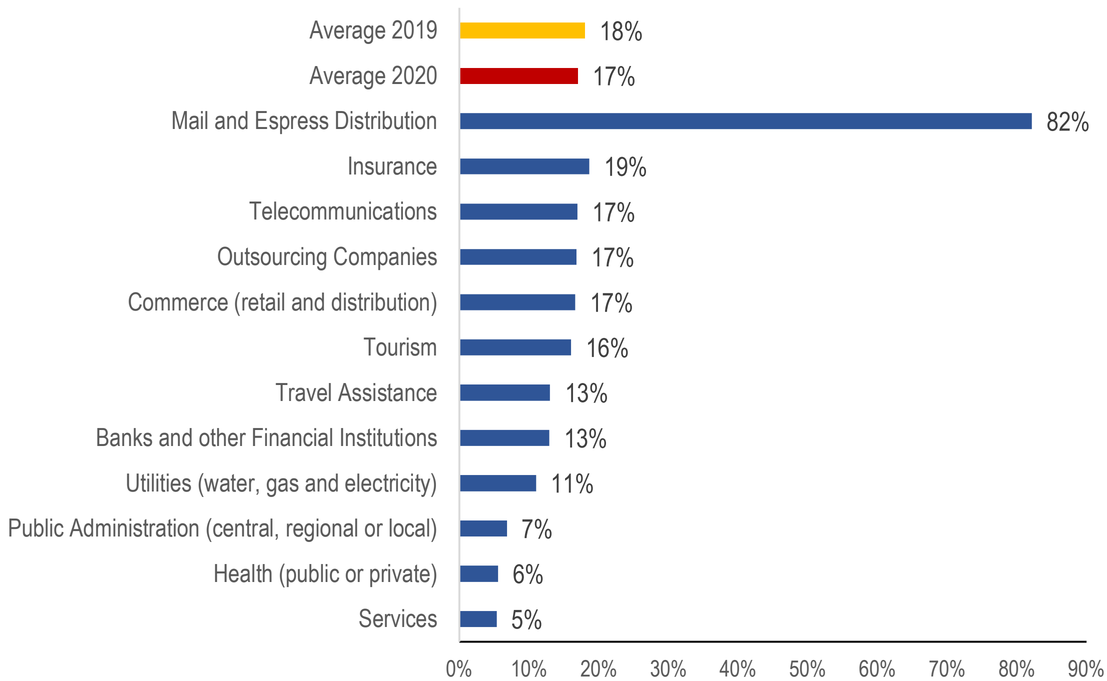


QUESTION: What is the ratio among other remunerations to the average monthly gross salary per Operator?

COMMENT: The ratio of other remuneration to average monthly gross pay decreased from 18% in 2019 to 17% in 2020. The sector with the highest ratio was significantly Mail and Express Distribution (82%). Among the sectors with the lowest ratios are Services (5%) and Health (6%).

FIGURE 50

RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF OPERATORS (N=870)

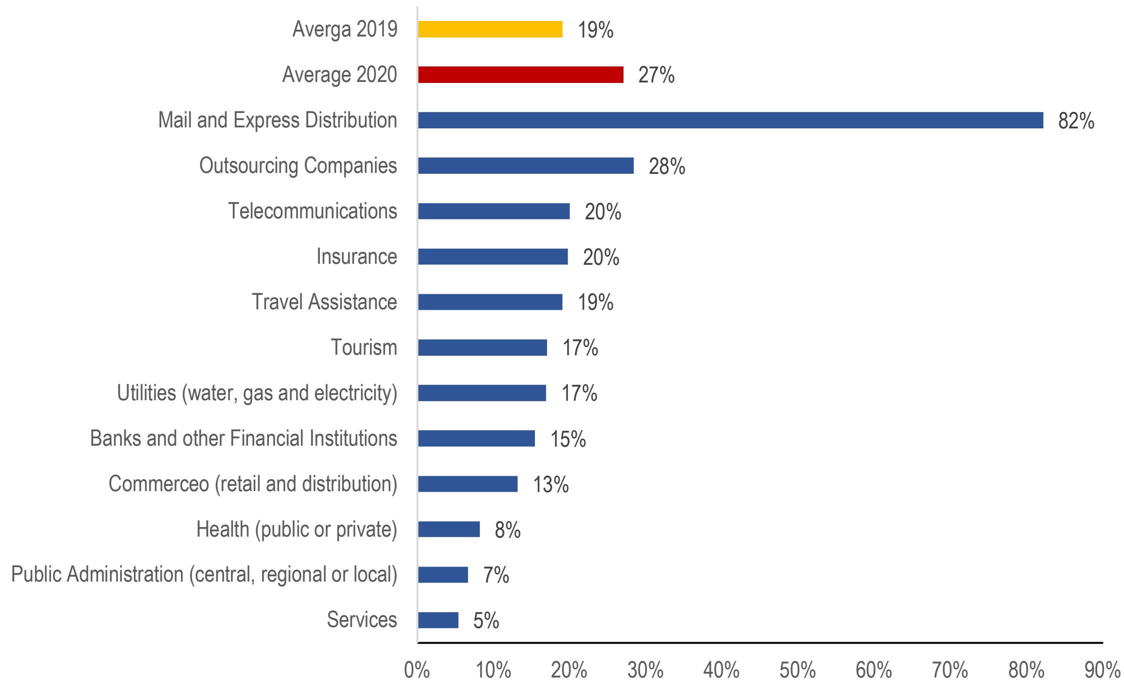


QUESTION: What is the ratio among other remunerations to the average monthly gross salary for Supervisors?

COMMENT: The ratio of other remuneration to average monthly gross salary for Supervisors is 10 percentage points higher than Operators' ratio, increasing from 19% in 2019 to 27% in 2020. Mail and Express Distribution (82%), similar to Operators, is the sector with the highest value.

FIGURE 51

RATIO BETWEEN OTHER REMUNERATIONS TO THE AVERAGE MONTHLY GROSS SALARY OF SUPERVISORS (N=870)

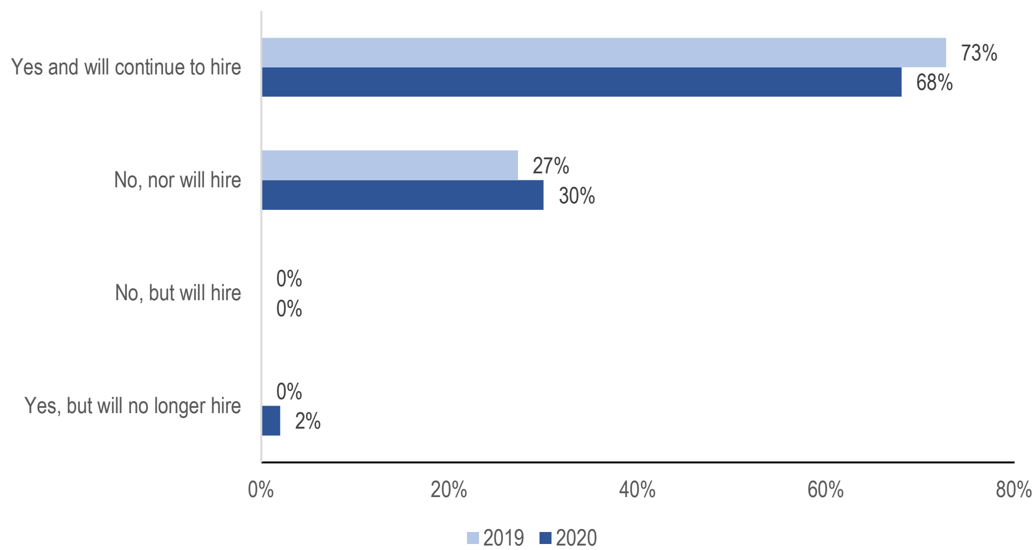


5 Resort to Outsourcing

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

COMMENT: Compared to the previous year, there was a lower contract of Outsourcing Services (from 73% to 68% in 2020), and 2% of respondents consider that despite currently hiring, it will no longer hire Outsourcing Services. In addition, there has been an increase in the share of companies that do not use or plan to contract these services in the future (27% to 30% in 2020).

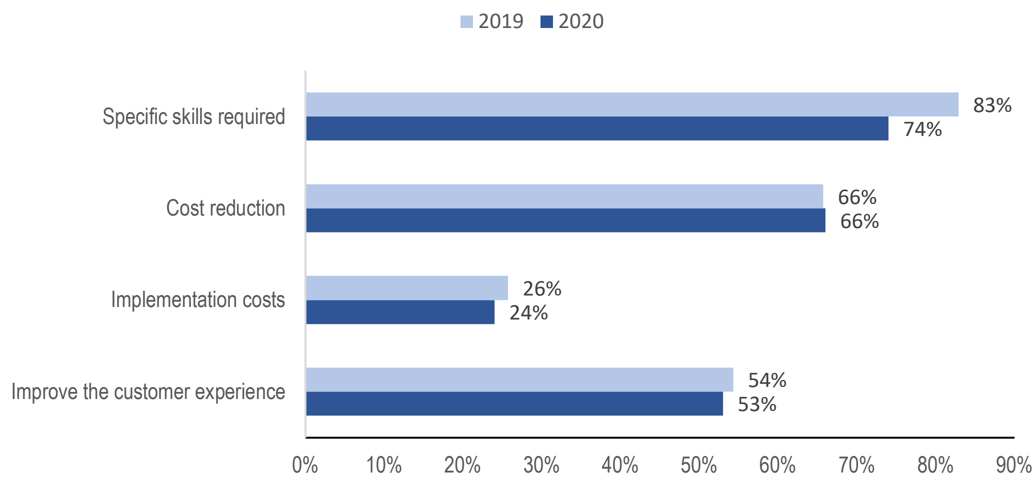
FIGURE 52
OUTSOURCING SERVICES HIRING (N=902)



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

COMMENT: As noted in the Previous Year Study, the need for specific skills (74%) and cost reduction (66%) remains the main reasons for hiring Outsourcing Companies, although the importance has decreased compared to 2019 (was 83%).

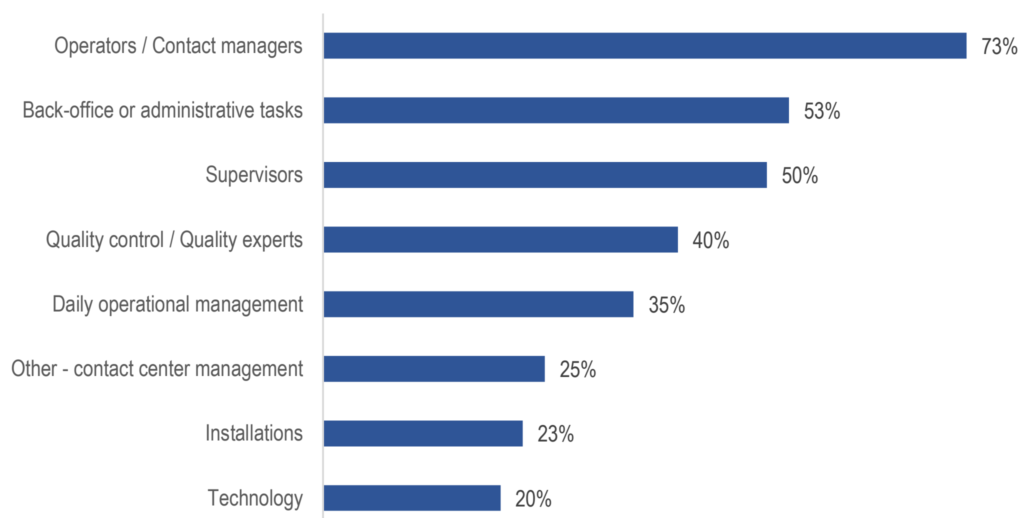
FIGURE 53
REASONS TO HIRE OUTSOURCING SERVICES (N=328)



QUESTION: What services are contracted in the Outsourcing model?

COMMENT: Respondents who hire under Outsourcing Companies mainly use the services of Operators (73%), Back-office or Administrative Tasks (53%), Supervisors (50%) and Quality Experts (40%). With the fewest references, the Facilities (23%) and Technology (20%).

FIGURE 54
HIRED SERVICES IN OUTSOURCING (N=373)

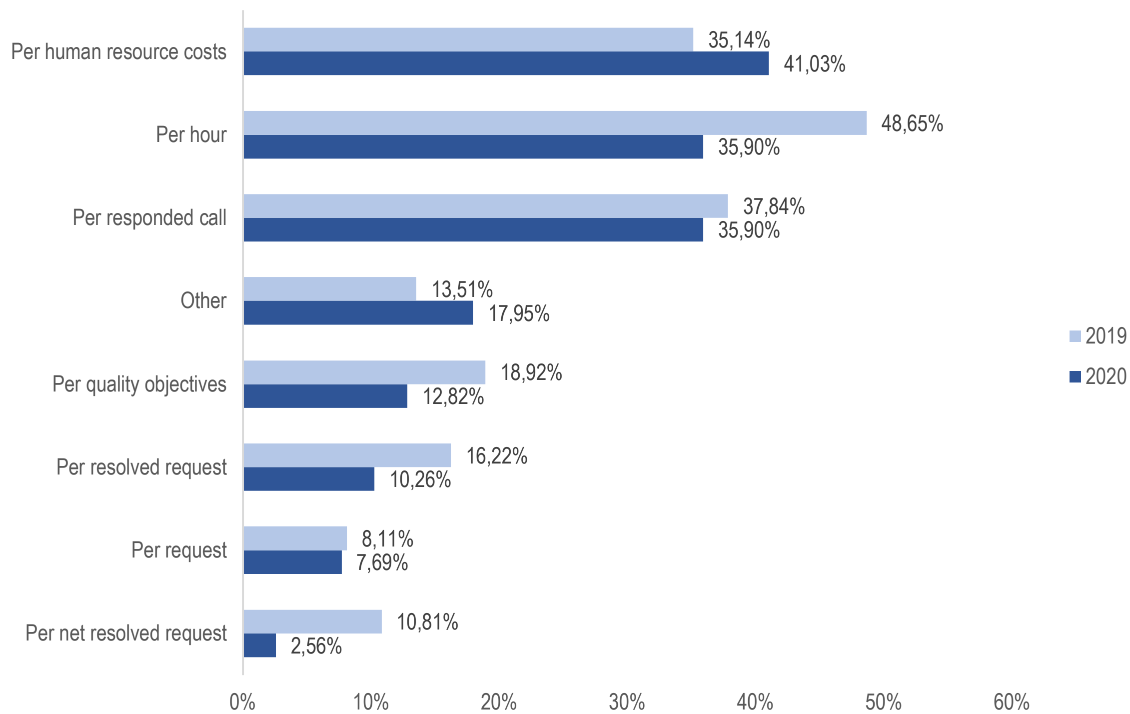


QUESTION: What is the Outsourcing remuneration model?

COMMENT: The Outsourcing remuneration model "Per Hour", the most used option in 2019, decreased significantly, from 48.65% to 35.90%. The most common compensation model in 2020 was "By Human Resource Cost" (41.03%). On the contrary, the "By Request" and "By Net Resolved Request" models were the least used in 2020 (7.69% and 2.56%, respectively).

FIGURE 55

OUTSOURCER'S REMUNERATION MODEL(N=274)



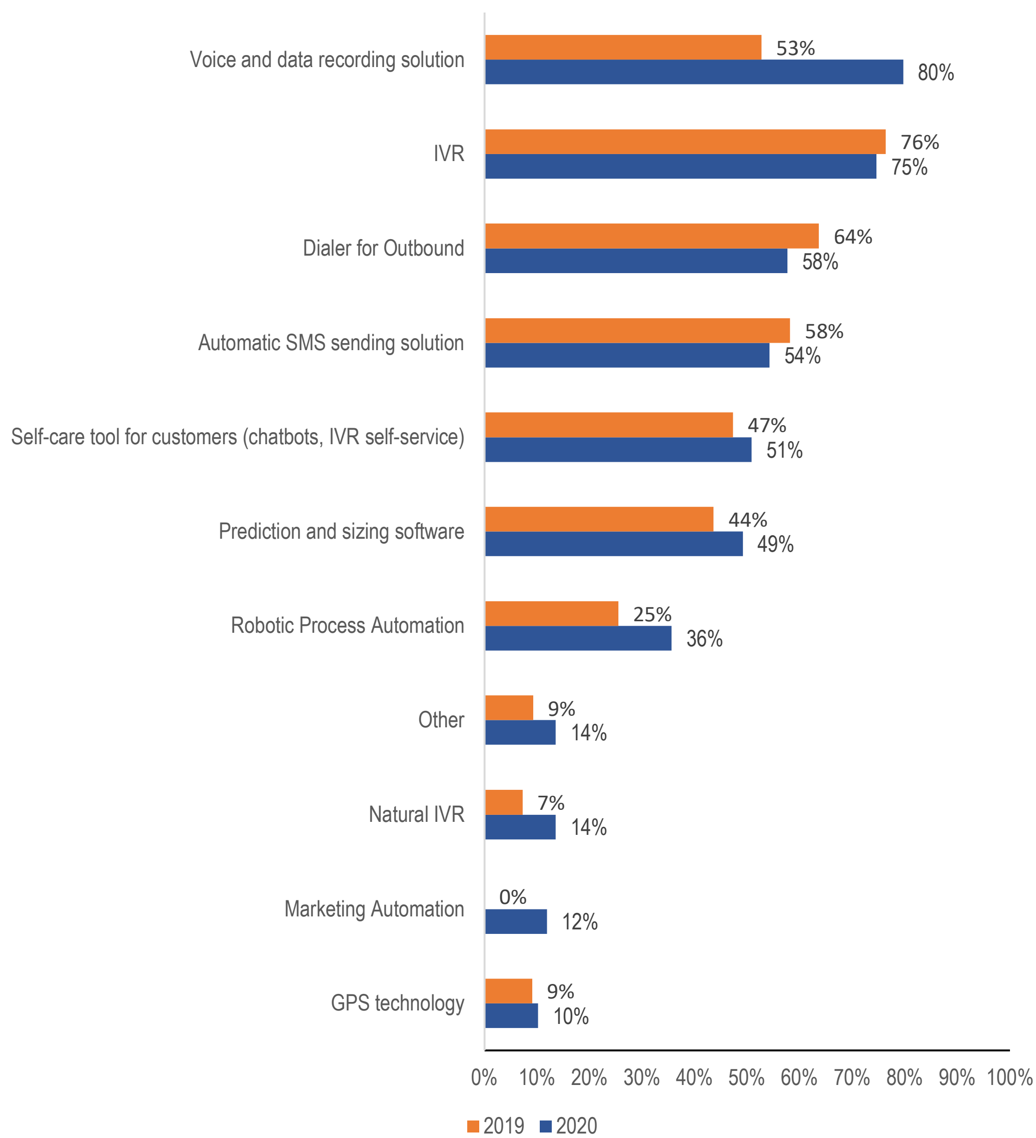
6 Technology

QUESTION: What are the main technological solutions used?

COMMENT: The most used technology solutions by Contact Center are Voice and Data Recording Solutions (80%) and IVR (75%). RPA and Natural IVR technologies recorded significant growth in 2020 compared to the previous year (25% to 36% and 7% to 14% respectively).

FIGURE 56

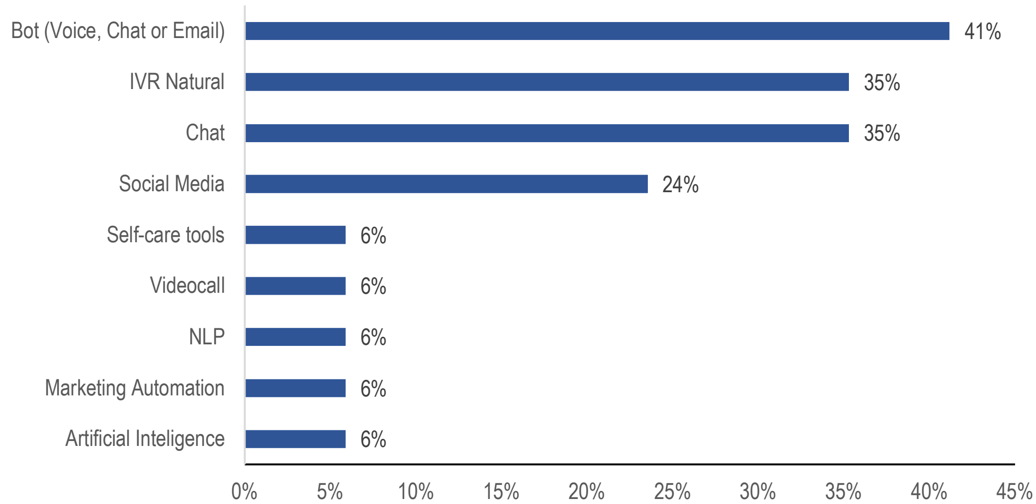
SOLUTIONS USED BY THE CONTACT CENTERS (N=902)



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

COMMENT: With regard to the adoption of new channels, Bots remain the technology of future betting (41%) investment in Natural IVR (35%) and Chat (35%).

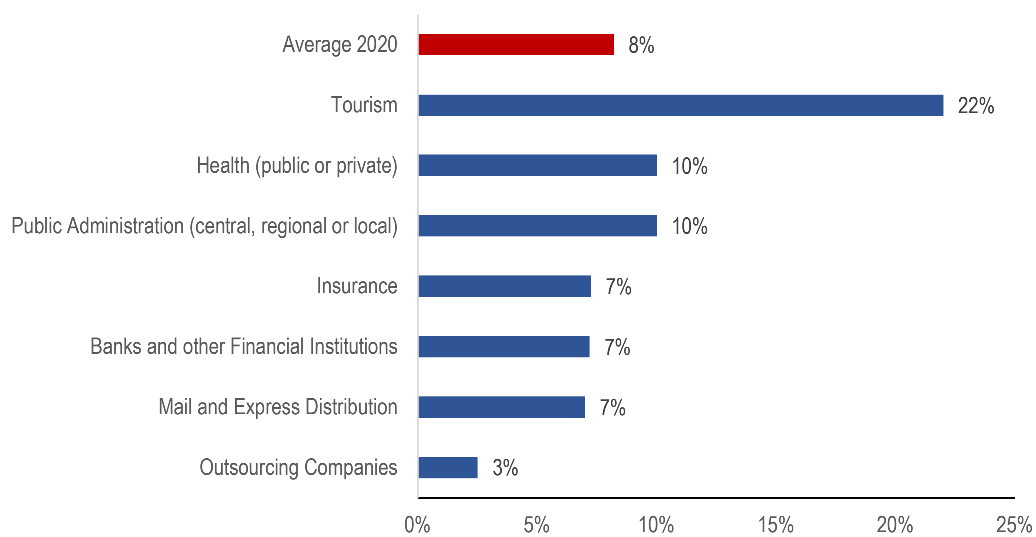
FIGURE 57
NEW CHANNELS TO USE IN THE FUTURE (N=101)



QUESTION: What is the percentage of calls by Bots?

COMMENT: Among the participants who provide conversational assistants, the average percentage of attendances provided by Bots was 8%. The Tourism sector stood out, a percentage of attendance of 22%, while the Outsourcing Companies recorded the lowest percentage of services by Bots (3%).

FIGURE 58
PERCENTAGE OF VISITS BY BOTS (N=217)

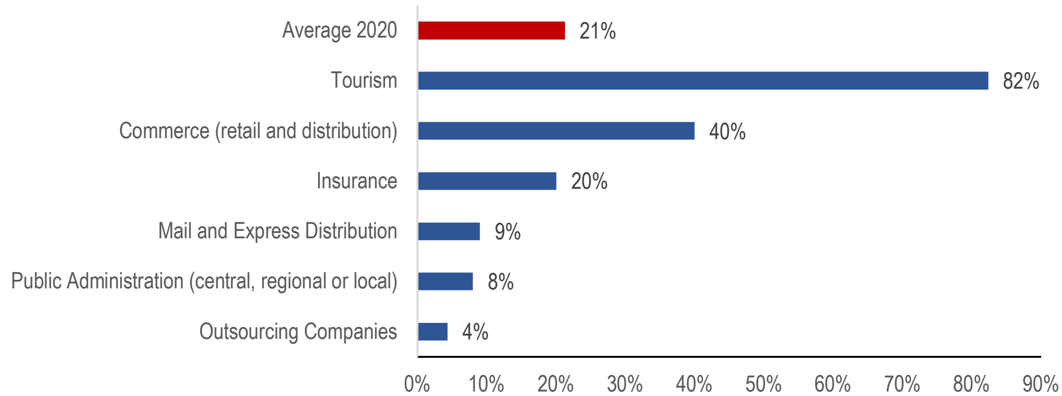


QUESTION: What percentage of requests resolved by Bots?

COMMENT: The average percentage of requests resolved by Bots in 2020 was 21%. This figure was higher in the Tourism (82%) and Commerce (40%) sectors, and, like the percentage of calls per Bots, the percentage of requests resolved was lower in the Outsourcing Companies (4%).

FIGURE 59

PERCENTAGE OF SOLVED REQUESTES BY BOTS(N=197)

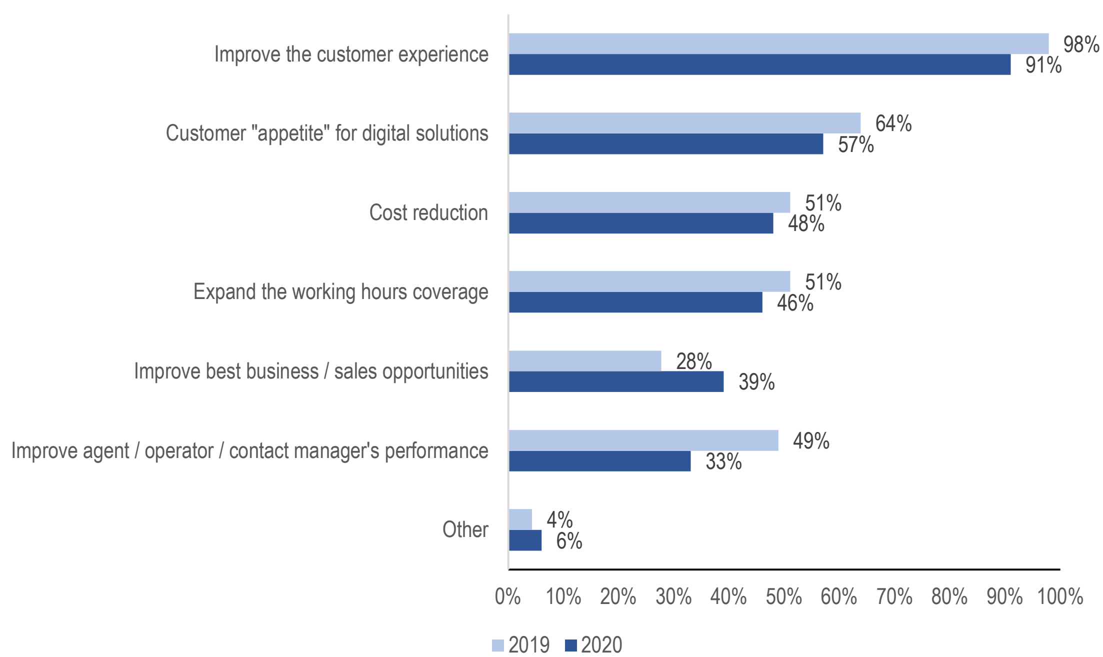


QUESTION: What are the main reasons for offering self-care service tools/channels?

COMMENT: As seen in previous studies, "Improving the Customer Experience" remains the main reason contact center companies want to offer Self-Care tools, followed by the Customer's "Appetite" for more digital solutions. It is also note that the increase in the percentage of participants who referred to "Improve business/sales opportunities" as one of the reasons for offering self-care tools (39% instead of 28%).

FIGURE 60

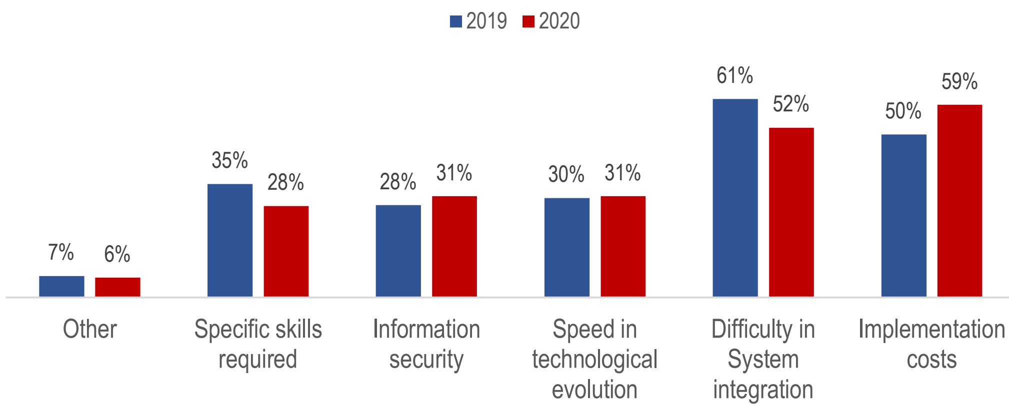
REASONS TO OFFER SELF-CARE TOOLS / CHANNELS (N=896)



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

COMMENT: As in previous years, Implementation Costs (59% instead of 50%) and the difficulty in Systems Integration (52% instead of 61%) remain the biggest challenges identified in the establishment of self-care care solutions.

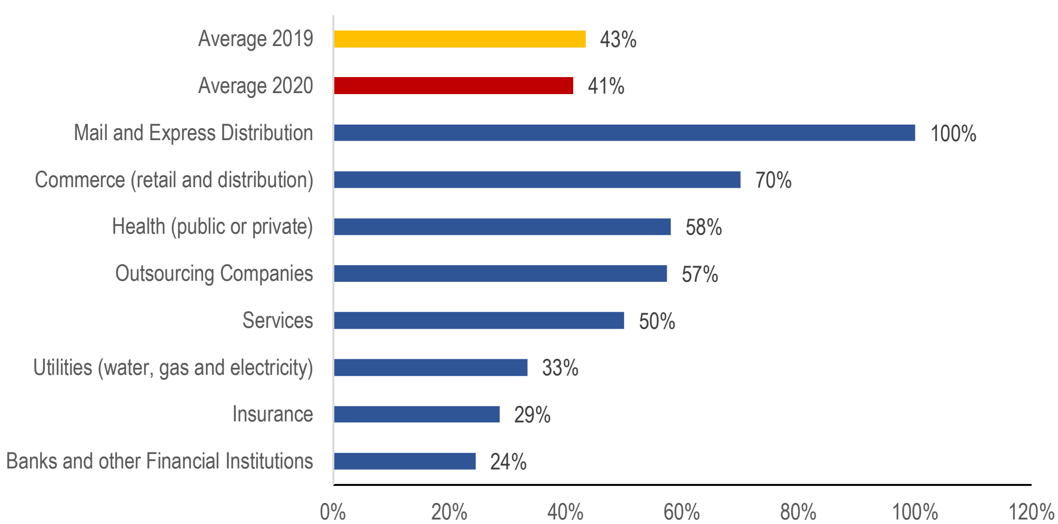
FIGURE 61
CHALLENGES TO ESTABLISH EFFICIENT SELF-CARE SOLUTIONS(N=797)



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

COMMENT: Among respondents, there is an average use of 41% of cloud-based technology models, down 2 percentage points from 2019. With regard to the use by sector, the Mail and Express Distribution sector makes full use of this type of model, followed by the Commerce (70%) and Health (58%) sectors.

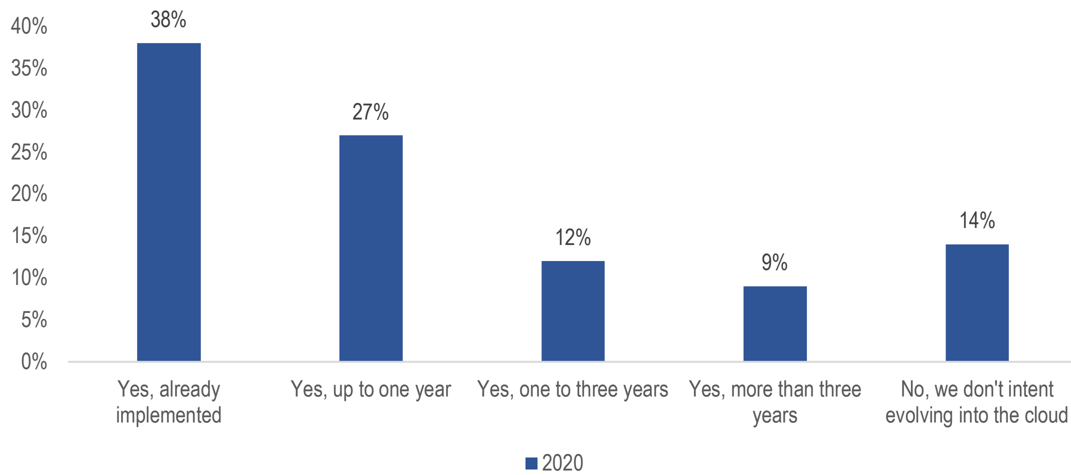
FIGURE 62
USE OF A CLOUD-BASED TECHNOLOGY MODEL (N=785)



QUESTION: Equate evolve your Contact Center to the Cloud?

COMMENT: By 2020, 38% of respondents already use a Cloud model, with 27% planning to evolve contact center to cloud next year. This trend appears to have been accelerated by the challenges that have arisen for the sector with the COVID-19 pandemic. At this time, only 14% of respondents do not equate to evolving the model to Cloud (in the previous year it had been 22%).

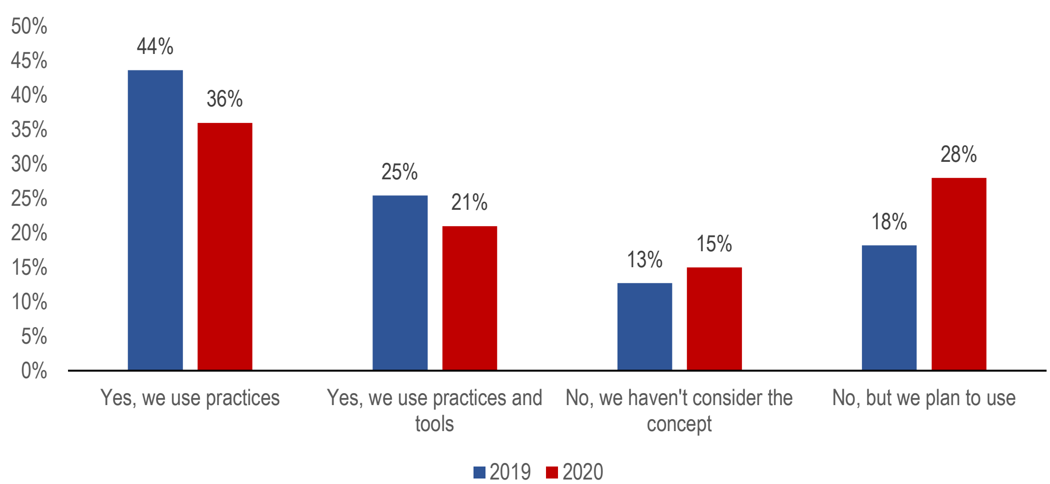
FIGURE 63
CONTACT CENTER EVOLUTION INTENT TO THE CLOUD (N=900)



QUESTION: Does your organization use Gamification tools?

COMMENT: Like 2019, in 2020 the share of Companies using Gamification practices and tools declined again (36% instead of 44% and 21% instead of 25%). However, it is important to note that 28% of respondents plan to use these practices, although they have not yet implemented them, which represents a significant increase over last year (it was 18%).

FIGURE 64
USE OF GAMIFICATION TOOLS (N=900)

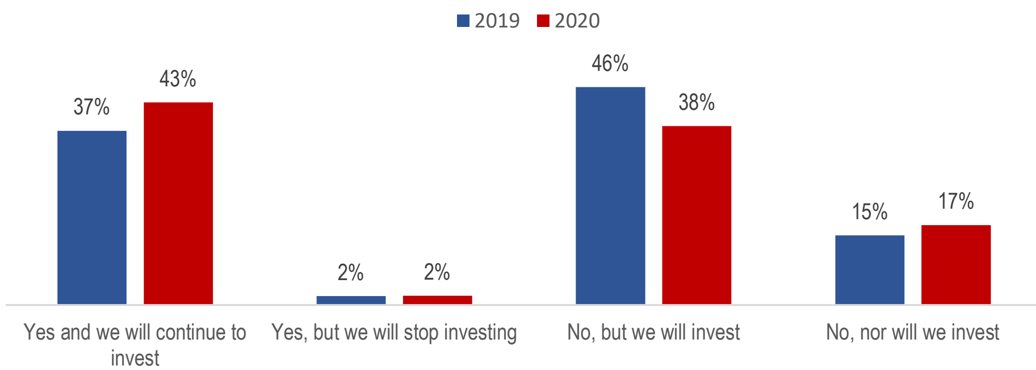


QUESTION: Are you currently investing in Robotic Process Automation? Do you plan to invest in the future?

COMMENT: In an overview, the majority of the companies surveyed do not currently invest in Robotic Process Automation (55%), although there has been an increase in the percentage of respondents who claim to use and plan to continue investing in this technology (43% instead of 37%).

FIGURE 65

INVESTMENT IN ROBOTIC PROCESS AUTOMATION (N=900)

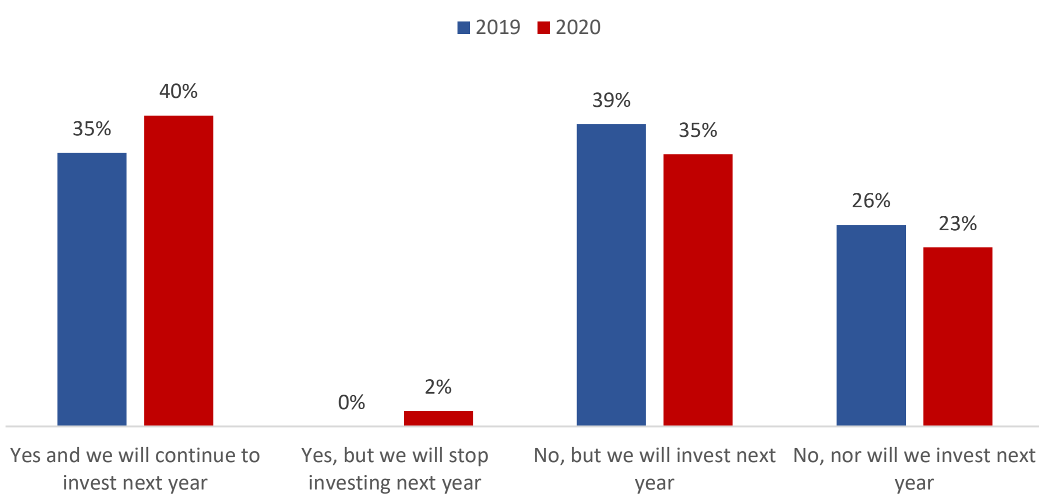


QUESTION: Do you currently invest in Solutions Based on Artificial Intelligence? Do you plan to invest next year?

COMMENT: In this year's Study, there was a significant increase in the percentage of respondents investing in Artificial Intelligence and planning to continue investing next year (40% instead of 35%), accompanied by a decrease in the percentage of companies that do not plan to invest in this solution (23% instead of 26%).

FIGURE 66

INVESTMENT IN ARTIFICIAL INTELLIGENCE (N=900)



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

COMMENT: In general, betting on Omnichannel solutions follows the responses of the previous Study, noting only a slight decrease in the percentage of companies that invest and plan to continue investing in Omnichannel solutions (71% instead of 72%), accompanied by a small increase in the percentage of companies that do not have this type of solutions and plan to invest in them (14% instead of 11%).

FIGURE 67
OMNICHANEL SOLUTION 2019 (N=712)

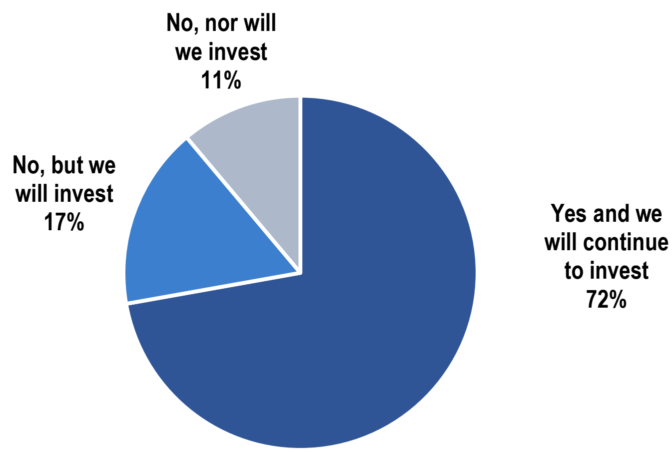
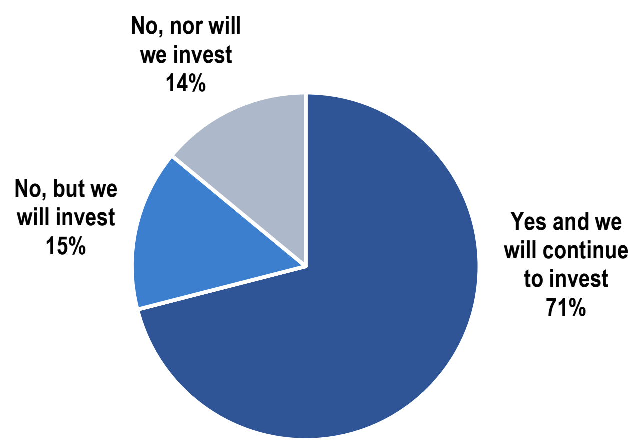


FIGURE 68
OMNICHANEL SOLUTION 2020 (N=900)



QUESTION: Are you currently investing in Customer Experience Projects?

COMMENT: As seen in 2019, investment in Customer Experience Projects in 2020 fell, as the share of companies using and planning to continue investing in this solution decreased slightly (71% instead of 73%), accompanied by a decrease in the percentage of respondents who do not use but expect to invest (15% instead of 23%) and an increase in those who do not invest or intend to invest (14% instead of 2%).

FIGURE 69

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

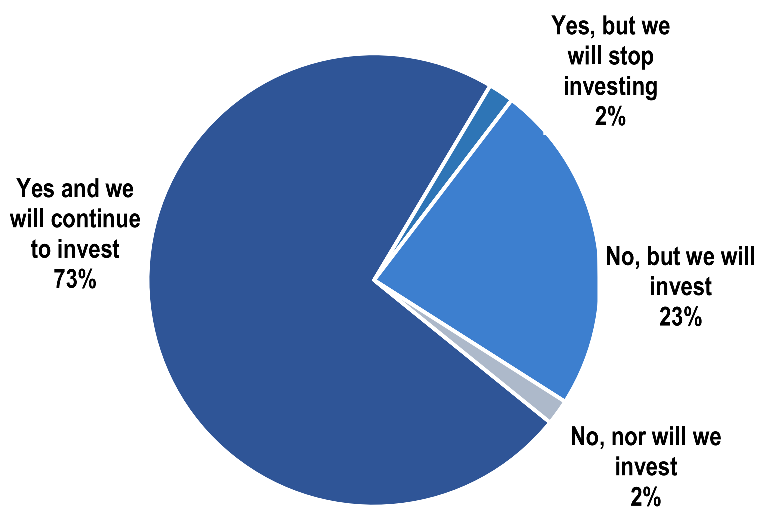
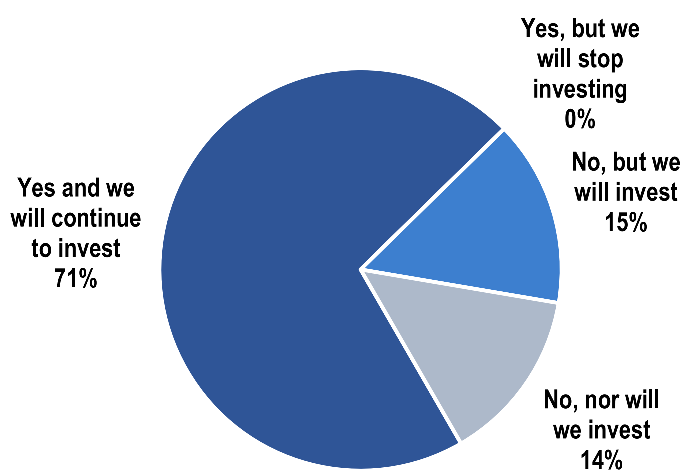


FIGURE 70

CURRENT INVESTMENT IN CUSTOMER EXPERIENCE PROJECTS (2020) (N=900)



QUESTION: Do you have a Speech to Text solution? Do you plan to invest next year?
COMMENT: Contrary to the trend in 2019, the percentage of respondents using and planning to continue investing in Speech to Text decreased (evolving from 27% to 21% in 2020). On the other hand, the percentage of respondents who do not yet have these types of solutions, but who plan to invest in the near future, increased compared to the previous year (48% instead of 43%).

FIGURE 71
SPEECH TO TEXT SOLUTIONS (2019) (N=682)

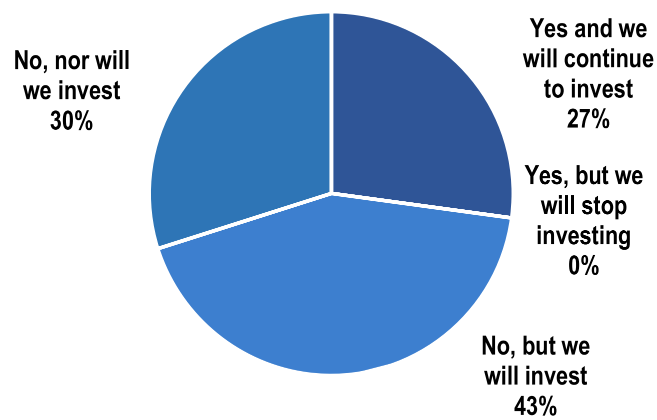
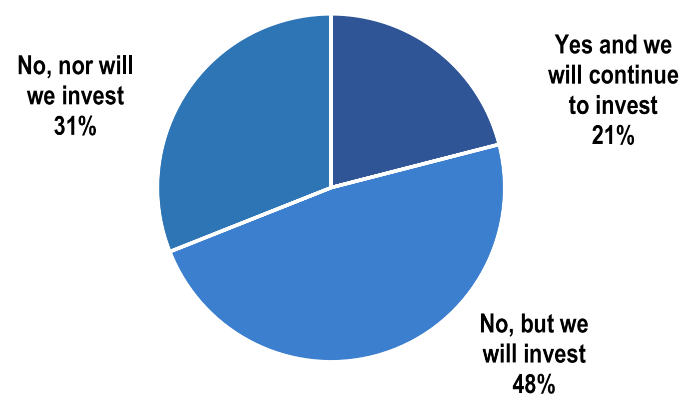


FIGURE 72
SPEECH TO TEXT SOLUTIONS (2020) (N=900)



7 Continuous Improvement

QUESTION: Are customer satisfaction surveys conducted to measure the service quality? If so, what is the average rating achieved in 2020 on a scale from 0% to 100%?

COMMENT: The percentage of companies conducting customer satisfaction surveys increased compared to 2019 (83% instead of 79%). On the other hand, the classification of these same surveys remained at 82%. The Travel Assistance (95%) and Health sectors (88%) were the ones with the best ratings, while Utilities (65%) and Tourism (64%) recorded lower ratings.

FIGURE 73
CONDUCTING SATISFACTION SURVEYS (N=830)

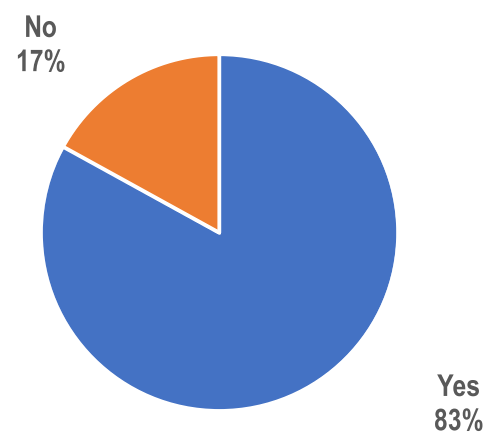
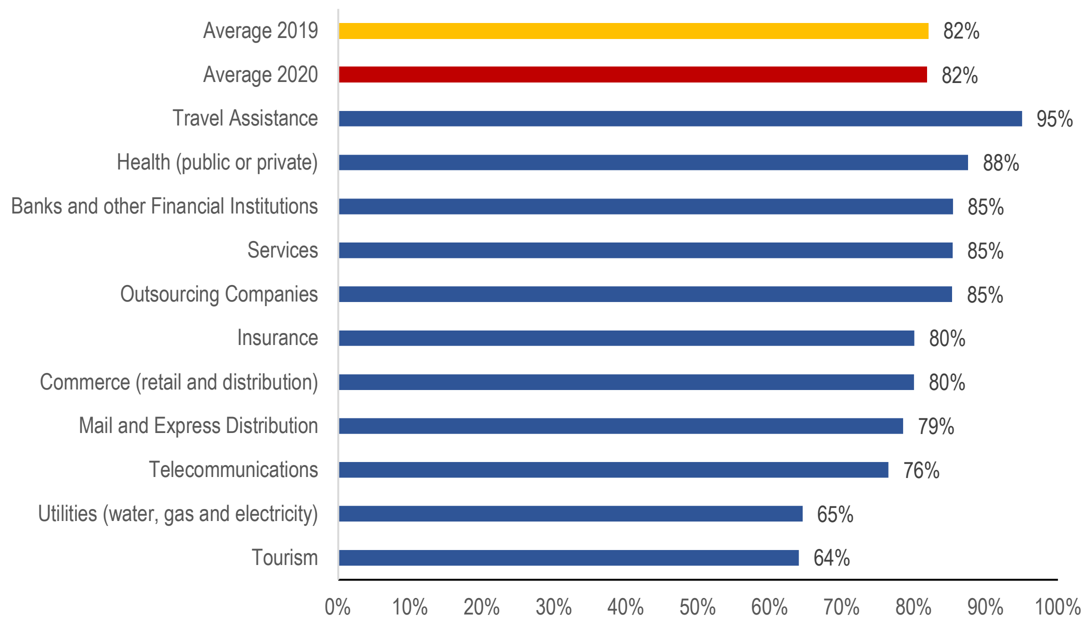


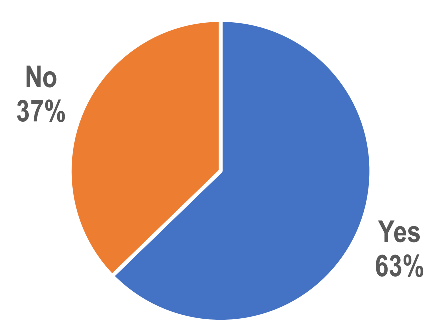
FIGURE 74
AVERAGE CLASSIFICATION OF CUSTOMER SATISFACTION SURVEYS (N=529)



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

COMMENT: Among respondents to the survey, the percentage using NPS is 63%, a slight decrease from 2019 (64%).

FIGURE 75
USING NET PROMOTER SCORE (NPS) (2020) (N=790)

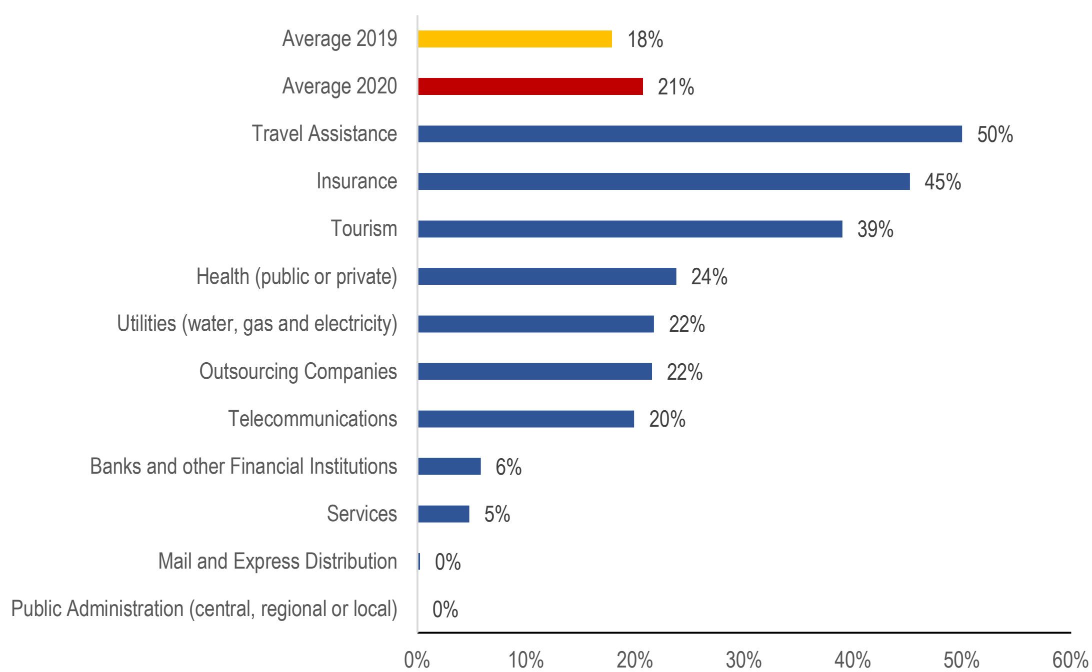


QUESTION: What is the percentage of calls in 2020 with quality measurement (through satisfaction survey)?

COMMENT: The average percentage of calls with quality measurement by the customer was 21% in 2020, a slight increase compared to 2019 (18%). The Travel Assistance sector recorded the highest value (50%), while the Public Administration sector was the one that verified the lowest percentage of calls evaluated by the customer (0%)

FIGURE 76

PERCENTAGE OF CALLS THAT HAVE QUALITY MEASUREMENT ASSESSED BY THE CUSTOMER (N=684)

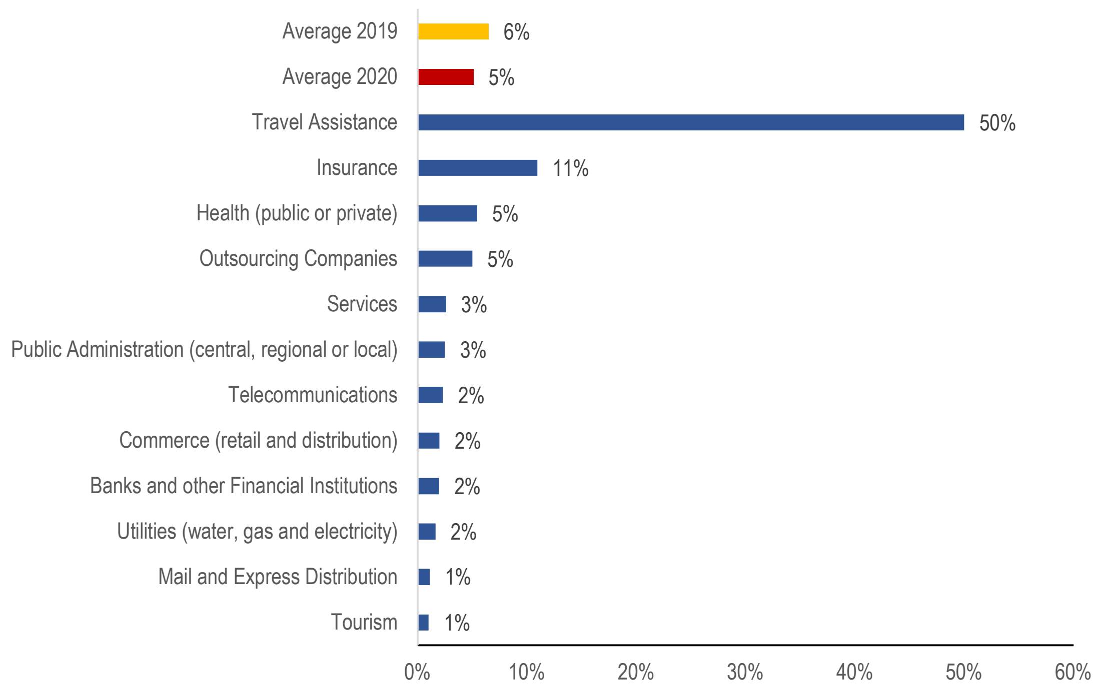


QUESTION: What percentage of contacts target internal monitoring in 2020?

COMMENT: In 2020, the percentage of contacts targeted by internal monitoring decreased from 6% to 5%. The sectors that contributed the most were Travel Assistance (50%) and Insurance (11%), and 6 sectors recorded values equal to or less than 2%.

FIGURE 77

PERCENTAGE OF CONTACTS TARGET BY INTERNAL MONITORING (N=553)

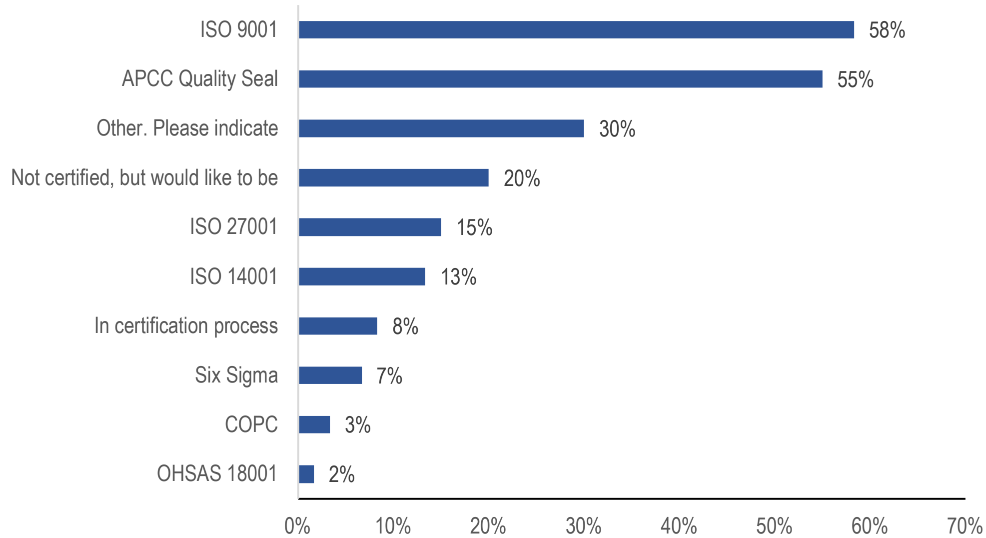


QUESTION: Which of the following certifications does the Contact Center have?

COMMENT: The most frequent certifications among the group of respondents are ISO 9001 (58%) and the APCC Quality Seal (55%), although in both cases the recorded values are either lower or equal than in 2019 (61% and 55%, respectively). It should be noted that 20% of the respondents indicate that they have no certification, but wish to have and 8% indicated that they were in the process of being certified.

FIGURE 78

KEY CERTIFICATIONS OF THE CONTACT CENTER (N=932)

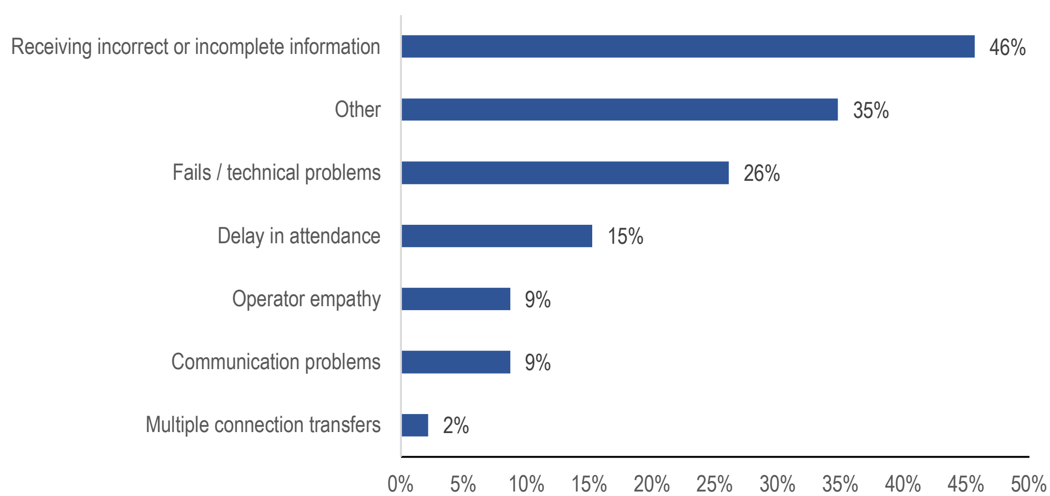


QUESTION: What are the main reasons for complaints received from the Contact Center service?

COMMENT: "Receiving incorrect or incomplete information" remains the most common reason for complaints regarding Contact Centers (46%). However, it is interesting to note that, in relation to 2019, there is an increase in percentages in all options, with the exception of "Delay in Care" (decreased from 31% in 2019 to 15% in 2020), and the percentage of complaints due to "Multiple Connection Transfers" (2%), "Communication Problems" (9%) and "Operator Empathy" (9%) have been very low, which is a positive data for the sector.

FIGURE 79

REASONS FOR COMPLAINTS RECEIVED FOR THE CONTACT CENTER SERVICE (N=726)



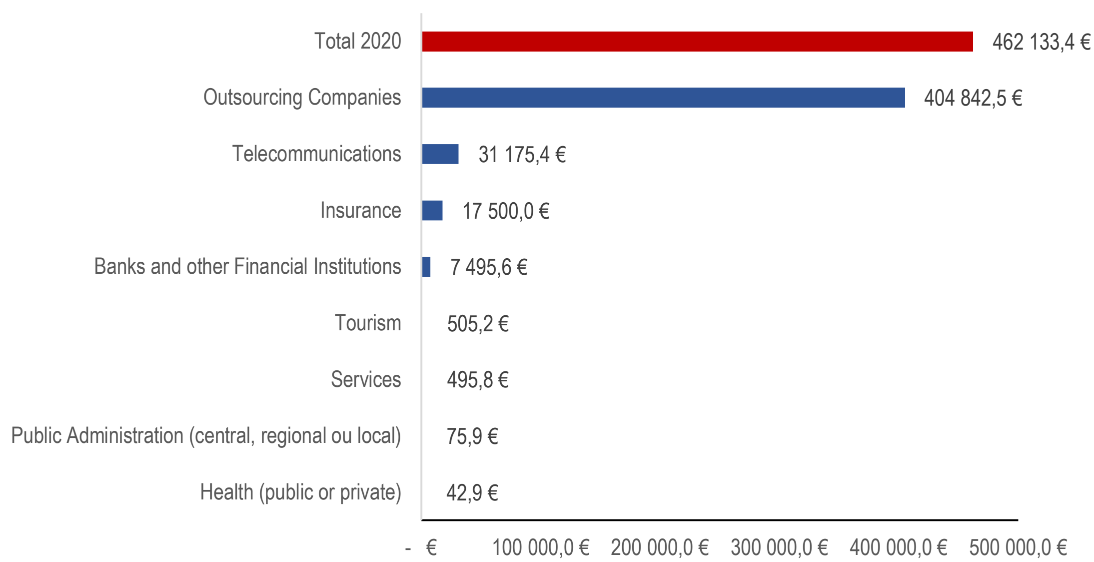
8 Financial Data

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

COMMENT: The answers to this question show a necessarily modest picture of the true representativeness of this study since they result from a reduced number of responses in relation to the sample (254 operations). We must also keep in mind that internally managed operations do not allow us to identify billing, while adding value to their organizations. Still, the aggregate of responses obtained in 2020 totals 462.133 million Euros, of which about 87% correspond to the invoicing of Outsourcing Companies.

FIGURE 80

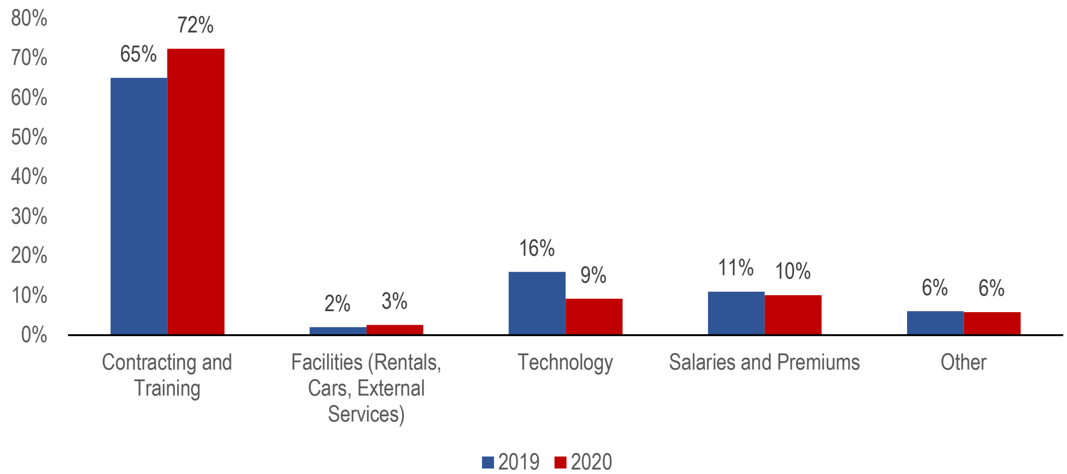
BUSINESS TURNOVER OF THE STUDY SAMPLE (IN THOUSEND EURO) (N=254)



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

COMMENT: The main heading in 2020 was "Hiring and Training" (72%). The remaining items recorded a similar percentage to 2019, with the exception of "Technology", which recorded a very significant decrease, from 16% to 9%.

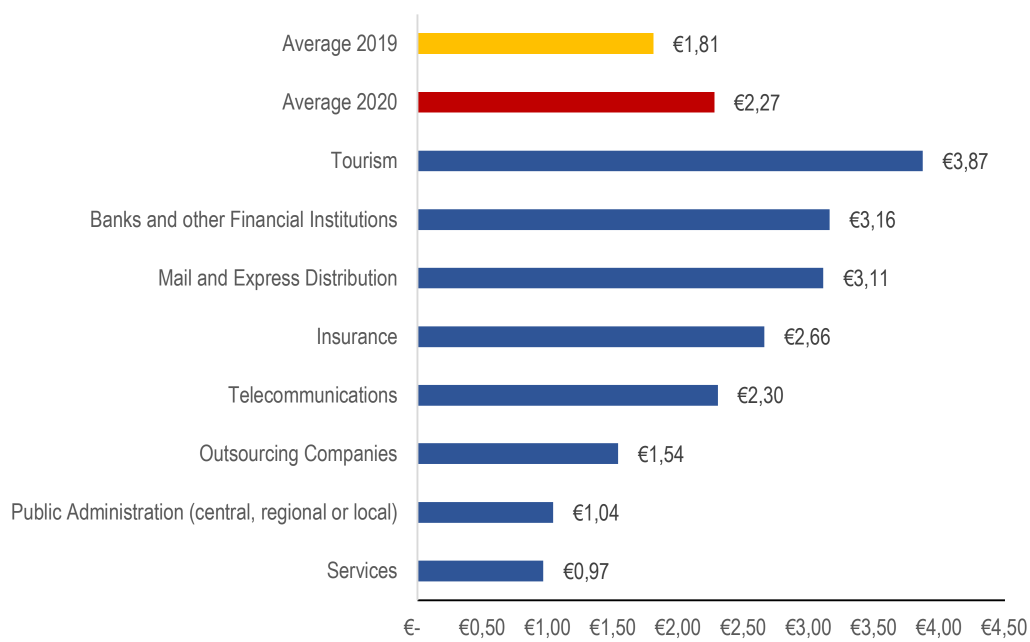
FIGURE 81
OPEX DISTRIBUTION OVER THE MAIN ITEMS (N=388)



QUESTION: What is the average cost per contact?

COMMENT: Compared to what was observed in the previous study, the average cost per contact increased to a value of 2,27€. The sectors with the highest costs were Tourism (€3.87) and Banks and other Financial Institutions (€3.16).

FIGURE 82
AVERAGE COST PER CONTACT (N=286)



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

COMMENT: The average cost per resolved request increased compared to 2019 (2,57€ to 2,75€). The sectors with the highest costs were Banks and other Financial Institutions (€4.83) and Insurance (€3.23).

FIGURE 83
AVERAGE COST PER REQUEST SOLVED (N=154)