apcc
associação portuguesa de contact centers

BENCHMARKING AND CARACTHERIZATION STUDY

CONTACT CENTER ACTIVITY 2025

APOIO:

Empathy Believer Unipessoal Lda
Procurando a excelência

randstad edp

AGENTIF AI broadvoice Go contact cisco concentrix Enghouse Interactive Five9

GENESYS inconcert intelcia

DCD ASSISTÊNCIA automaise EURONET SERVICES Shaping a World of Trust foundever grupogbi konvecta

NEWSPRING SERVICES ctt RH mais talkdesk vodafone

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PREFACE

This is the 20th edition of the Characterization and Benchmarking Study of Contact Center Activities, in the year following the marking of a similar anniversary of the Association itself.

This near coincidence clearly highlights the importance that the APCC has attributed, since its founding in 2005, to the collection, analysis, and dissemination of information about the Industry it represents, addressing in detail all the identifying areas of the Sector.

Thus, extensive information is collected from the largest number of Operations, whether those opting for in-house management or those relying on Outsourcers, from quantitative data by sector of activity and by region, to data on operational performance, the characterization of Human Resources, or even perspectives on investment in Technology.

This Study, now published, has been increasingly used by our Members and by all Economic Agents connected, directly or indirectly, to the Sector, as an important source for identifying the stronger and weaker points of each, in comparison to their peers, a fundamental function of Benchmarking, but also as a decision support tool for management and investment.

The importance of the Study is supported by all the Companies that agreed to send their Operations data to the APCC, through the submitted questionnaire. Without their participation, the Study would not have been possible or, at least, its representativeness could be questioned.

Therefore, we express our gratitude to all who participated for their valuable collaboration.

In this 2025 edition, we have consolidated information gathered from **1,950** Operations (26.5% more than in the 2024 edition), employing **64,529** Employees, almost 60% of the national universe of the Sector, ensuring that the data presented in the Study has an unparalleled degree of reliability and representativeness compared to similar studies.

The APCC Benchmarking Study is made available, without reservations, on our website, in its original version and, starting from 2016, also in an English version, to allow access to all Entities, national or foreign, public or private, who wish to understand the reality of a Sector that is sometimes, although increasingly less so, unjustly undervalued.

We hope that our Associates and all those interested in our Industry will appreciate this 2025 edition and make the most of the information provided.

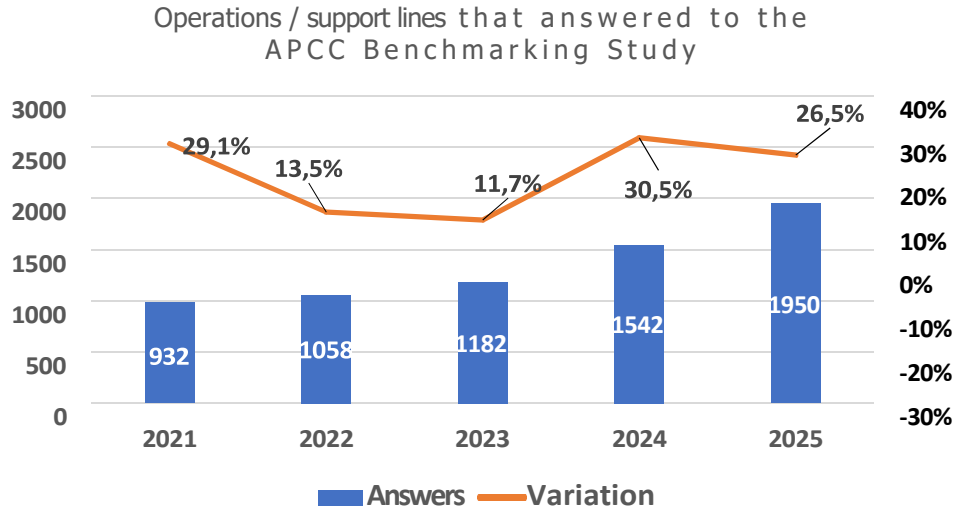
We reiterate our gratitude to all those who made this initiative possible and enriched it with their responses.

Ana Gonçalves

Secretary General

METHODOLOGICAL NOTE

Carried out on data from the 2024 financial year, the 2025 edition of the Characterization and Benchmarking Study of Contact Center Activity in Portugal is the result of consolidating data from the responses of 1,950 Operations / Support Lines, provided by Companies and Institutions from various sectors of economic activity: Public Administration and Social Sector, Travel Assistance, Banks and other Financial Institutions, Retail, Post and Express Distribution, Industry, Health, Insurance Companies, Security, Telecommunications, Tourism, Utilities, and Other Services. It is notable that the number of Operations / Support Lines recorded this year has grown by +26.5%, following a trend observed in previous years.



The number of Employees engaged in these Operations / Service Lines has also reached a new high of 64,529, an increase of 5.2% compared to the 2024 edition.

Considering that it is estimated that the total number of Employees in this Industry is 115,000, we can conclude that the sample represents between 56% and 57% of this total.

This sample size ensures statistical reliability of the collected data, which is expressed in a margin of error of 0.3% for a confidence level of 99%.

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

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

All the information collected is presented in global terms, by economic activity sector and by nature.

When relevant, the information was also broken down by region: District and Autonomous Region.

The data was processed with the highest statistical rigor and with utmost respect for confidentiality regarding all the information collected.

In the case of data from the chapters on Human Resources and Policies and Benefits, the values presented correspond to weighted averages based on the size of the responding Operations / Service Lines. We cannot forget to highlight that the main credit for the quality of the data expressed in this Study goes entirely to all the Companies and

Institutions that answered to the survey, and we owe them our thanks for their generous willingness to participate in this task and for the care, and often patience, with which they welcomed our contacts.

A word of gratitude for all the suggestions given to us throughout the year, aimed at increasingly improving this instrument and also for the criticisms that you kindly made, which compel us to always strive to do better and better.

Finally, thanks are also due to the Board of the APCC for the trust placed in us and to the executive team, with special mention to the Secretary-General, Ana Gonçalves, for the excellent collaboration and support provided throughout the execution of the work.

02

STUDY

EXECUTIVE SUMMARY

Sample Characterization

The Contact Center industry is present in all Districts and Autonomous Regions of Portugal, and this circumstance greatly contributes to the development of less favored regions, through the significant investments made, and it significantly aids in the settlement of a predominantly young population in those areas. The sample that supports this study reflects this reality, having been possible to obtain responses from Operations / Customer Service Lines across the entire country.

Despite this dissemination across the national territory, the predominance remains in Lisbon, Porto, and Braga. In Lisbon, 62.9% (68.7% in 2023) of Operations / Customer Service Lines and 57.5% (59.5% in 2023) of Human Resources are located; in Porto, the corresponding values are 12.9% (13.6% in 2023) and 20.4% (20.2% in 2023), and in Braga, 5.7% (6.1% in 2023) and 8.3% (7.3% in 2023).

We can thus conclude that these three main hubs account for 81.5% of the Operations / Lines of Service, whereas in 2023 this figure was 86.2%, proving significant growth outside these three Districts in the number of Operations / Lines of Service.

The representativeness of the sample of this Study is undeniably large, as we recorded responses from 1,950 Operations / Lines of Service, an increase of 26.5% compared to last year's edition. In these Operations / Lines of Service, there were 64,529 Employees (Agents, Supervisors, and Support Staff), almost 60% of the total Human Resources in this Industry.

It is therefore entirely safe to extrapolate the conclusions presented in the various chapters of this Study to the entire Sector.

In Contact Centers, in Portugal, the most frequent functions are Customer Service, mentioned by 91.5% of Operations / Service Lines, and Back Office, mentioned by 78.9%. The least referred functions were Reception and Order Processing, only mentioned by 26.8%, and Studies and Surveys, with only 12.7%.

The economic sectors most present in the sample are Health (19.3% of Operations / Service Lines), Banks and other Financial Institutions (11.5%), Insurers (10.9%), and Commerce (10.8%).

Of the total responses received, 29.2% are from Outsourcers, 25.3% are from In-house Operations, and 45.5% are from Outsourcers' Customers. Therefore, the percentage of responses from Operations / Service Lines supported by Outsourcers is 74.7%.

The percentage of service positions provided by Outsourcers is 83% of the total, which demonstrates the relevance of their activity in this Industry in Portugal.

Operational Performance

Considering the values gathered for 2023, we find the following significant variations this year:

• The Telephone channel is predominant in all Operations / Service Lines that responded to the Study - 65.8% of Inbound contacts and 92.8% of Outbound contacts occur through this channel, noting that in 2023 the percentage of Inbound contacts was 68.8%;

• 55% of calls received by Bots are forwarded to an Agent, compared to 57% in 2023;

• The Average Inbound Handling Time shows a slight reduction, from 5.8 to 5.7 minutes; in the case of Outbound Average Handling Time, the trend was in the opposite direction, from 4.3 to 4.5 minutes;

• The On Hold time shows a significant worsening, increasing from 57 seconds to 68 seconds, thus returning to the value of 2022;

• After years of some stability, the First Contact Resolution indicator worsened from 84% to 80%;

• Regarding Retention, an activity of paramount importance in such competitive markets, a diverse behaviour is recorded between Inbound (which worsened from 65% to 61%) and Outbound (which improved from 37% to 40%);

• The Successful Sales Rate, which had reached 21% in 2023, has returned to the values of previous years (17%).

Human Resources

The ratios of Agents/Supervisor and Agents/Support Staff experienced opposite trends from 2023 to 2024: while the first slightly worsened, from 10.6 to 10.7, the second showed a significant improvement from 13.5 to 10.6. This evolution results from a much more significant increase in Support Staff (from 3883 to 5137) than in Supervisors (from 4911 to 5075).

Just as was already observed in 2023, although the absolute number of Employees has increased, the number of FTEs

records a reduction of 9.2%, which can only be associated with a growing increase in part-time hours or a reduction in total weekly working time (35-hour workloads and a 4-day week).

Having been one of the almost static variables at 79% in recent years, the Average Resource Occupancy Rate rises to 82% in 2024.

Regarding the distribution of employees by work regime, there is a continued reduction in the 100% remote category, which decreased from 27% to 20%. This reduction corresponds to an increase from 35% to 48% in the 100% on-site regime, while hybrid regimes went from 38% to 32%, with a slightly higher weight on hybrids with fixed on-site days.

When asked about the evolution until the end of 2025, the feedback received indicates a continued reduction of 100% remote, from 20% to 17%, with slight increases in 100% on-site (+1%) and hybrid regimes (+2%).

Analysing the distribution of Employees by education level, the most common educational qualifications among Contact Center Employees are complete Secondary Education (56.6%), with 30% holding a complete University degree and 9.9% attending University Education. In 2023, these values were 30.8% and 7.5%, respectively.

Employees with qualifications below complete Secondary Education accounted for 3.5% of the total, compared to 3.4% in 2023.

In terms of gender characterization, the female gender predominates among both Agents, with 68%, and Supervisors, with 62%, clearly indicating no gender discrimination.

Regarding the distribution by age group, the age group from 25 to 40 years predominates, with 53.7% among Agents and 60.3% among Supervisors. It is noteworthy that the percentage of Employees over 40 years old is 28.9% and 35.5%, respectively.

It is observed that 88% of operations conduct Employee satisfaction surveys, compared to 84% in 2023, with annual frequency predominating (50%).

Also, the percentage of satisfaction has dropped again, now from 80% to 77%, the lowest recorded in several years.

In 2024, the turnover of Agents decreased again, from 27.1% to 23.5%, while the turnover of Supervisors increased from 5% to 11%.

Regarding absenteeism among Agents, there was a very significant reduction to 7.8%, when in 2023 it was 9.9%.

The initial training recorded was 20 days, when in 2023 it was 21.5 days. Nevertheless, some stability should be noted in this indicator, as 20 days was the recorded figure in 2022. Meanwhile, training throughout the year significantly increased from 69 to 74 hours for Operators and from 63 to 65 hours for Supervisors.

Regarding contractual regimes, the permanent contract continues to prevail, increasing from 50.7% to 54.6%. Temporary Work decreased from 3.4% to 2.4%, and Service Providers grew from 0.7% to 2.3%.

Policies & Benefits

The average monthly remuneration of Agents maintained its growth trajectory in 2024, reaching €973, an increase of 4.4% compared to €932 in 2023. This growth is even more significant as we must consider that Agent's turnover remains high, with successive recruitment vacancies for new Employees at starting salaries.

In the case of Supervisors, there was a more significant growth, from €1,230 to €1,312 (+6.7%).

Compared to 2023, the average daily food allowance paid to Employees increased from €7.31 to €7.60, corresponding to about €163 monthly.

As for the ratios of other remuneration relative to gross monthly salaries, there was a small increase among Agents (from 20% to 20.2%) and a decrease for Supervisors (from 24% to 20.6%).

Resort to Outsourcing

The percentage of companies that hire and plan to continue hiring Outsourcers decreases from 73.7% to 65%, in contrast to the 23.7% increase in the percentage of those who neither hire nor intend to hire, from 23.7% to 37%. 4% of non-user respondents intend to start hiring.

The most frequently contracted services from Outsourcers are: Agents (100%), Supervisors (87%) and Back-office and Daily Operational Management (both at 70%).

The predominant compensation models are: Per hour (62%) and by quality objectives (45%). It is noteworthy the increasing importance of this last compensation model, which in 2023 still had 29% of references.

As for the reasons for resorting to Outsourcing, the demand for flexibility and growth capacity (88%) and for specific skills (84%) stand out.

Technology

The most used technological solution in Contact Centers is the Classic IVR (89%). Special mention should be made of solutions surveyed for the first time in the APCC Study: Real-Time Quality Monitoring and Analysis (41%), Performance and Goal Management Software (39%), Generative Artificial Intelligence (35%), Automatic Notification Sending Solution via WhatsApp (30%), and Use of AI Agents (21%).

In terms of future, the use of AI Agents stands out (41%), along with Generative Artificial Intelligence and Voice and Data Recording and Analysis Solution (both at 32%).

In response to the commitment to new channels, Generative AI Chatbots stood out with 64% of mentions, followed by Chat (WhatsApp) at 46%.

In 2024, the percentage of interactions handled by Bots remained at 14%, the same as in 2023, while the percentage of requests solved by Bots was 31%, down from 34% in 2023.

Regarding the reasons for offering self-care support channels, 88% mentioned it is to Improve Customer Experience, with 72% citing System Integration Challenges as the main obstacle to implementing this channel.

For the sample supporting this study, 80% of respondents use a Cloud-Based Model, whereas in 2023 this percentage was 85%. The percentage of responses indicating that they do not intend to evolve to the Cloud remains at 13%, while 7% intend to evolve in the near future.

In 2024, the use of gamification practices and tools decreased by 2% to 34%, while the exclusive use of practices increased by 5% to 28%. Notably, 19% say they do not use it but intend to in the future.

Investment in RPA and AI-based solutions has also reached unprecedented levels, at 59% and 64%, respectively, compared to 58% and 50% in 2023.

Investment in AI Agents has already been reported by 20% of Operations / Customer Service Lines, but it should be noted that 54% stated they intend to invest in the future.

Also, Speech to Text and Omnichannel Solutions reached historic highs, with 79.7% and 90% respectively in terms of investment or investment decision.

Continuous Improvement

In 2024, we witnessed a recovery in the percentage of Operations / Service Lines conducting surveys to measure Customer satisfaction, now at 63%, compared to 56% in 2023.

The average rating obtained in these surveys was 81%, down from 83% in 2023.

The most used metric remains the Net Promoter Score (NPS), with its prevalence rising from 45% to 46%.

Additionally, in 2024, there was an increase in the percentage of calls evaluated by the Customer, from 29% to 34%, and a new decrease in the percentage of contacts subject to internal monitoring, from 8% to 6%.

The percentage of certified Operations / Service Lines is very high, at 59.6% of the total. Among those certified, 80.9% obtained ISO 9001 certification and 78.7% received the APCC Quality Seal (compared to 68.9% in 2023).

The remarkably high percentage of Operations / Service Lines that invest and intend to continue investing in Customer Experience projects is noteworthy: 93%, compared to 92% in 2023. It should be noted that the remaining 7% indicated their intention to invest in the future.

Financial Data

About this section of the Study, only the responses from the Outsourcers were requested and considered.

In terms of annual billing volume, 52.4% are in the range between €10 and €50 million, and 28.6% are in the range above €50 million. It is noteworthy that the aggregated percentage of Outsourcers with annual billing exceeding €10 million decreased from 84.2% in 2023 to 81% in 2024, a change naturally resulting from the significantly larger sample size.

Regarding the distribution of OPEX across the main categories, it is observed that Salaries and Bonuses represent 78% of the total in 2024, down from 81% in 2023. The justification for this reduction in the specific weight of Salaries and Bonuses is attributed to the increase in the percentage corresponding to Technology, from 6% to 7%, and Facilities, from 6% to 8%.

The average cost per contact increased again from €2.24 to €2.57 from 2023 to 2024. The average cost per request, on the other hand, decreased again from €3.08 to €2.91.

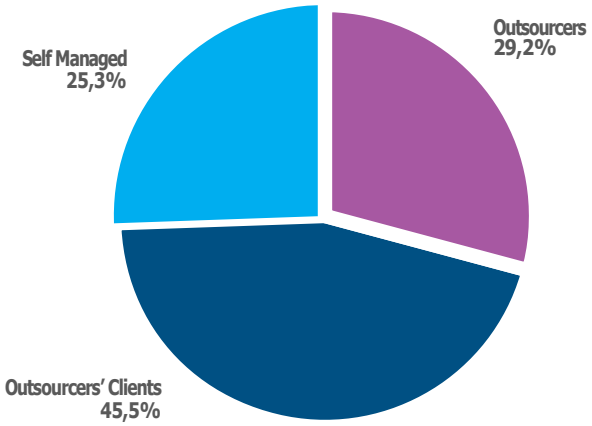
01 SAMPLE CARACTHERIZATION

QUESTION: Considering Outsourcing, what is the nature of your Company / Institution?

COMMENT: Considering the nature of the Companies / Institutions that answered, we realize that 29,2% are Outsourcers, 45,5% are Outsourcers' Clients and 25,3% are Companies / Institutions with self management of their Contact Center Operations.
This means that 74,7% of all Operations / Service Lines are managed resorting to Outsourcing.

FIGURE 1

WHAT IS THE NATURE OF THE COMPANY / INSTITUTION? (N=1950)

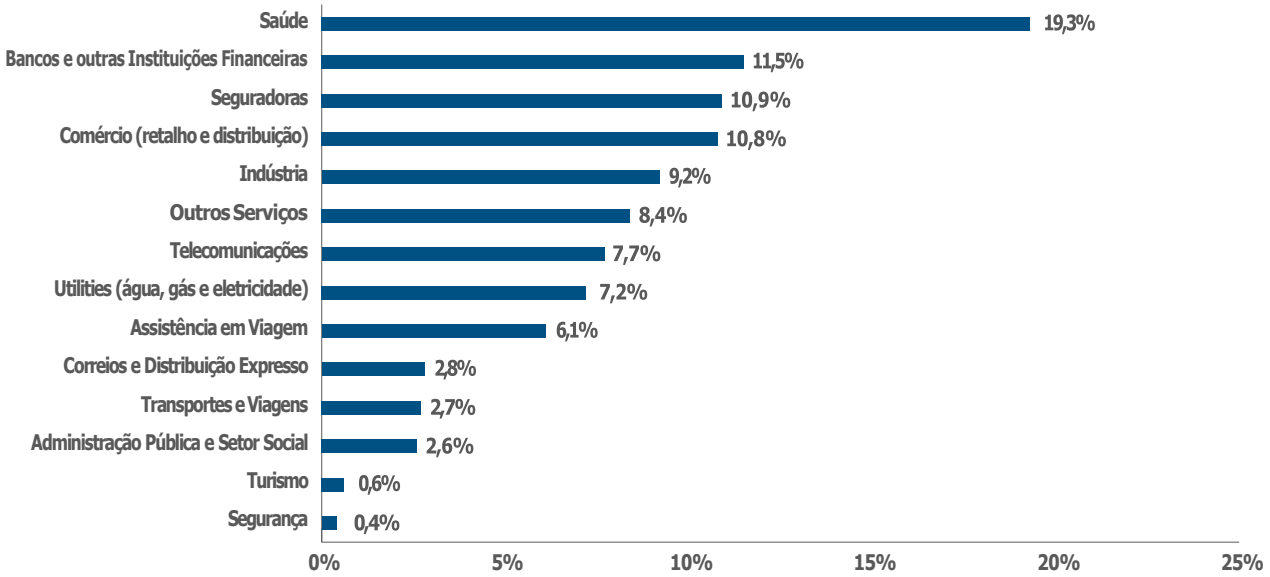


QUESTION: How many Operations / Service Lines per activity sector are involved in this answer? And how many Employees are involved?

COMMENT: To this 2025 Edition of the Characterization and Benchmarking Study on the Contact Center Activity in Portugal, considering data of 2024, there were answers from 1.950 Operations / Service Lines. This number represents a significant increase of 26,5% over the 1.542 answers of last year's edition. We have also reached a new maximum on the number of Employees involved in these Operations / Service Lines: 64.529, which represents about 56% of this Industry universe.

FIGURE 2

DISTRIBUTION OF LINES PER ECONOMIC ACTIVITY SECTOR (N=1950)

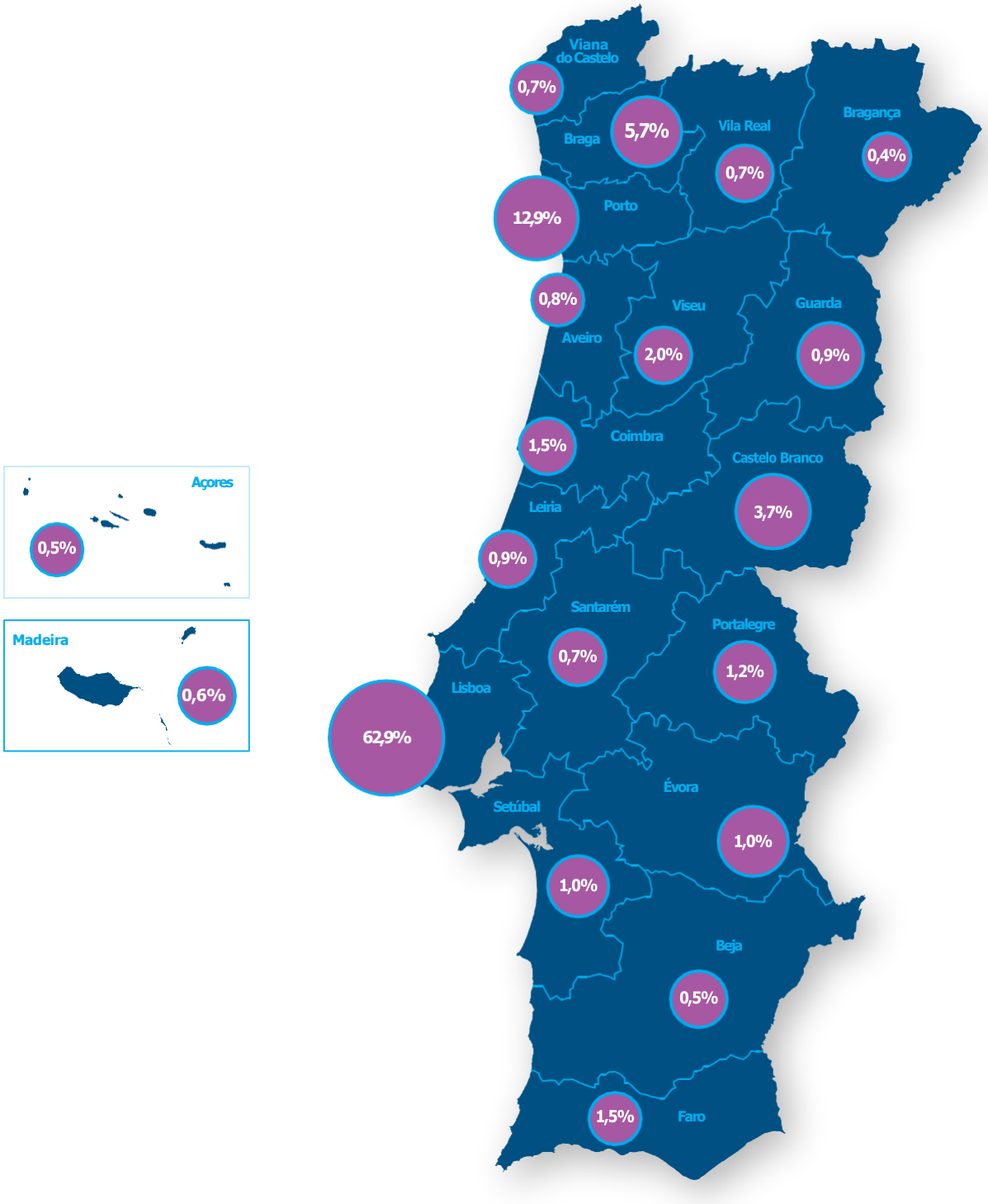


QUESTION: How many Operations / Service Lines per Region are involved in this answer? And what is the respective number of Employees?

COMMENT: Contact Centers continue to be present in all Districts and Autonomous Regions, without exception. In terms of their distribution, Lisbon still predominates, with 62.9% of Operations (down from 68.7% in 2023), followed by Porto with 12.9% and Braga with 5.7%. With values above 1% of the total Operations, we find Castelo Branco (3.7%), Viseu (2.0%), Faro (1.5%), Coimbra (1.5%), Portalegre (1.2%), Évora (1.0%), and Setúbal (1.0%). It is noteworthy that there is a loss of importance of the most represented Districts (Lisbon from 68.7% to 62.9%, Porto from 13.6% to 12.9%, and Braga from 6.1% to 5.7%), which indicates a greater diffusion throughout the rest of the country.

FIGURE 3

DISTRIBUTION OF OPERATIONS / SERVICE LINES PER REGION (N=1950)

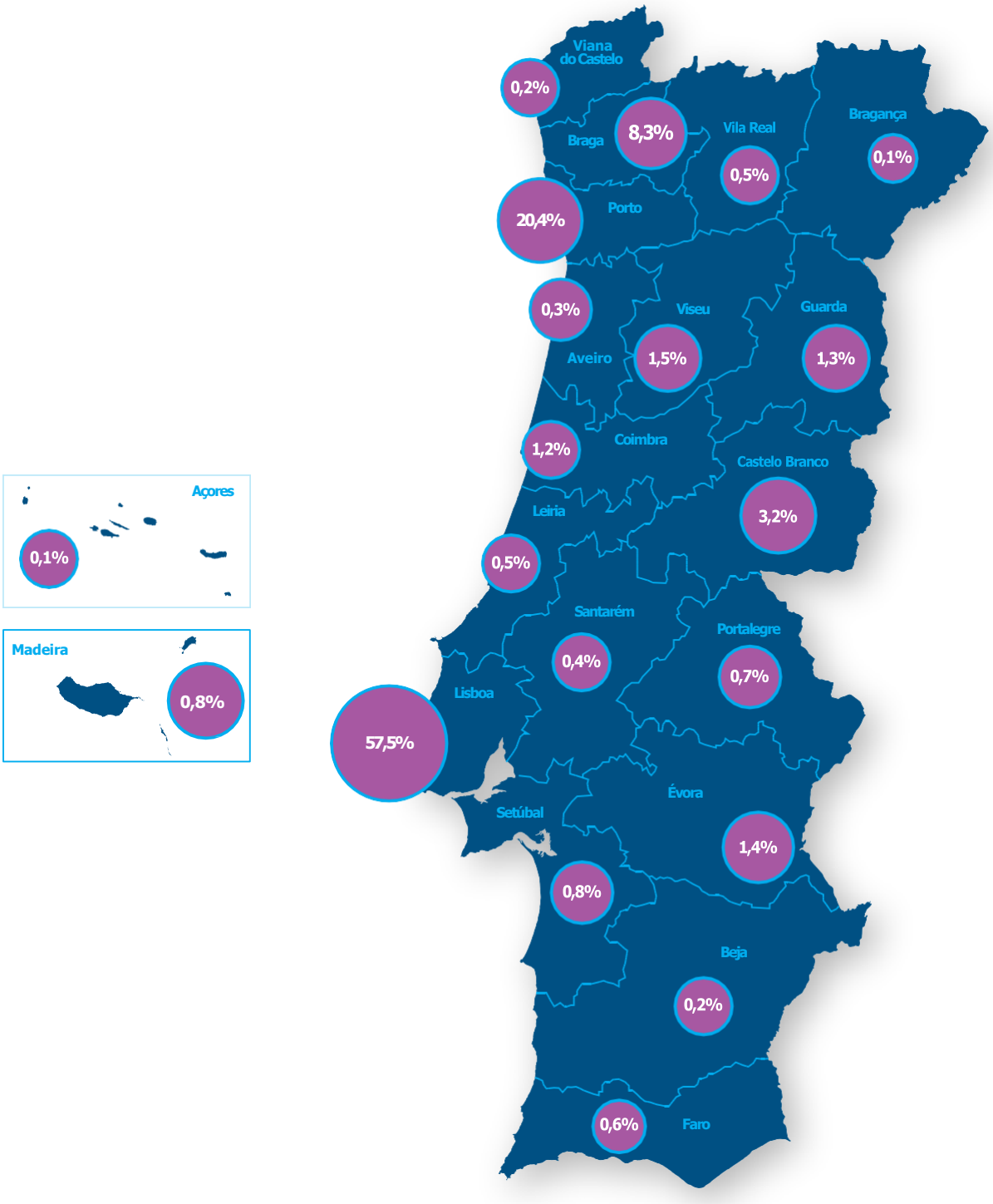


QUESTION: How many Operations / Service Lines per Region are involved in this answer? And what is the respective number of Employees?

COMMENT: The Contact Center Industry establishes itself as an employer with significant weight in all regions of the country. In terms of the distribution of Human Resources, Lisbon continues to dominate, with 57.5% of employees, but with a lower percentage than that recorded in 2023 (59.5%). Highlight also goes to Porto (with 20.4%) and Braga (with 8.3%), both seeing growth compared to the national total. Regions with values above 1% of the total employees in the Industry include Castelo Branco (3.2%), Viseu (1.5%), Évora (1.4%), Guarda (1.3%), and Coimbra (1.2%).

FIGURE 3A

DISTRIBUTION OF HUMAN RESOURCES PER REGION (N=1950)



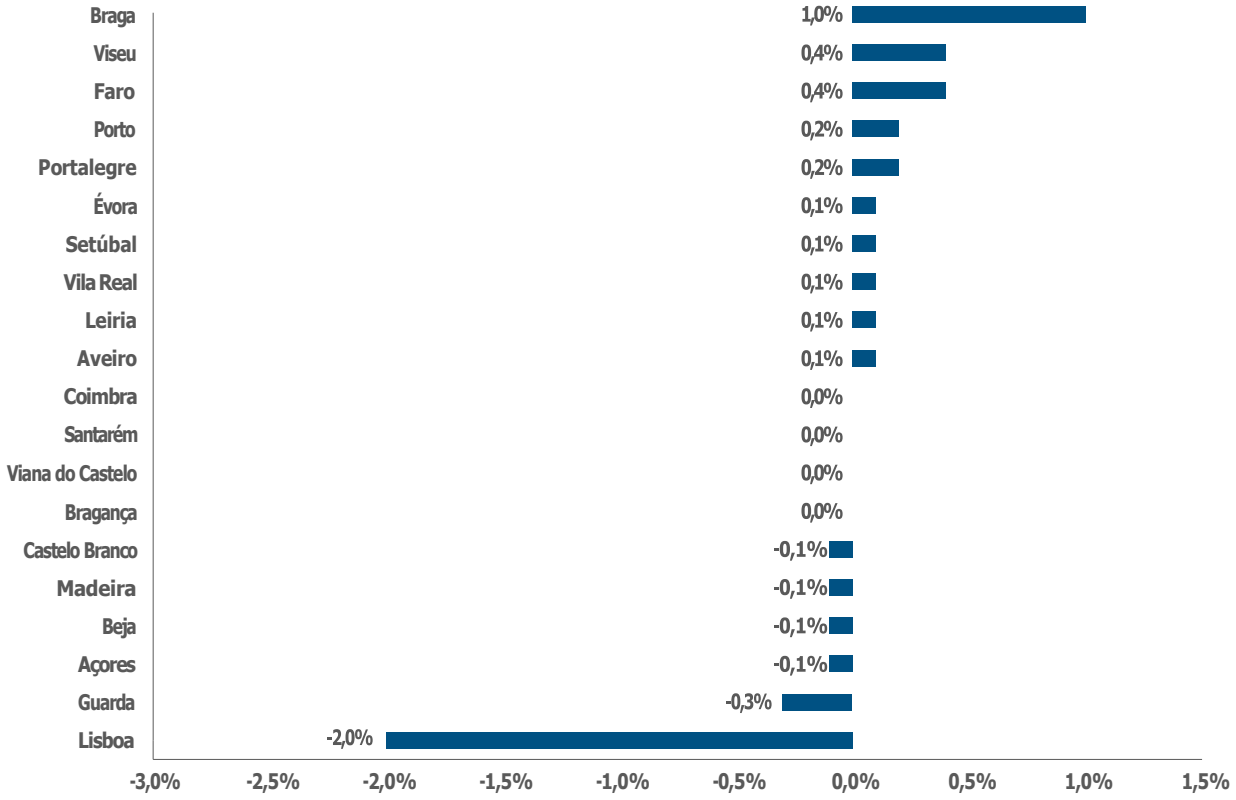
QUESTION: How many Operations / Service Lines per Region are involved in this answer? And what is the respective number of Employees?

COMMENT: In 2024, there was a significant increase in the relative weight of Human Resources allocated to the Contact Centers in Braga (+1.0%), Viseu, and Faro (both +0.4%), Porto and Portalegre (both +0.2%). Lisbon experienced a significant decline of 2.0%. Guarda also registered a reduction of 0.3%. All other Districts or Regions showed no changes or had variations not exceeding 0.1%.

FIGURE 4

EVOLUTION 2024/2023 OF THE PERCENTAGE OF HUMAN RESOURCES PER REGION

(N=1950)

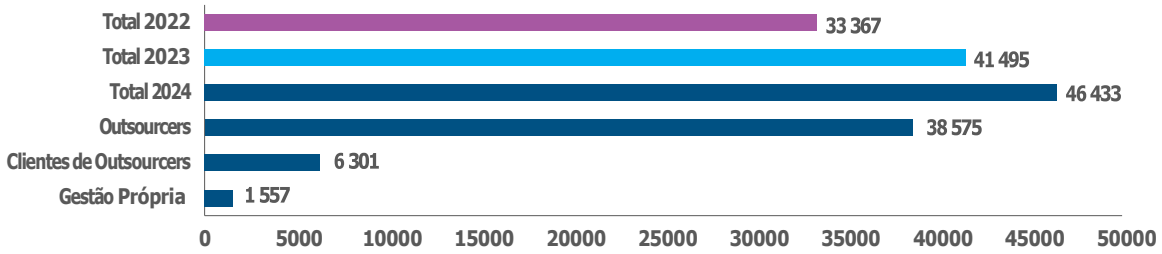


QUESTION: What is the number of Service Positions in your Contact Center (Including Front office and Back-office positions)?

COMMENT: In total of the Operations/Lines of Service that responded, there are 46,433 service positions (SPs), an increase of 11.9% compared to last year's figures. This evolution is due to the significant increase in the number of responding Operations/Lines of Service (+26.5%). As in the data from 2023, the share of SPs from Outsourcers is 83% of the total.

FIGURE 5

NUMBER OF SERVICE POSITIONS IN THE CONTACT CENTERS (N=1950)

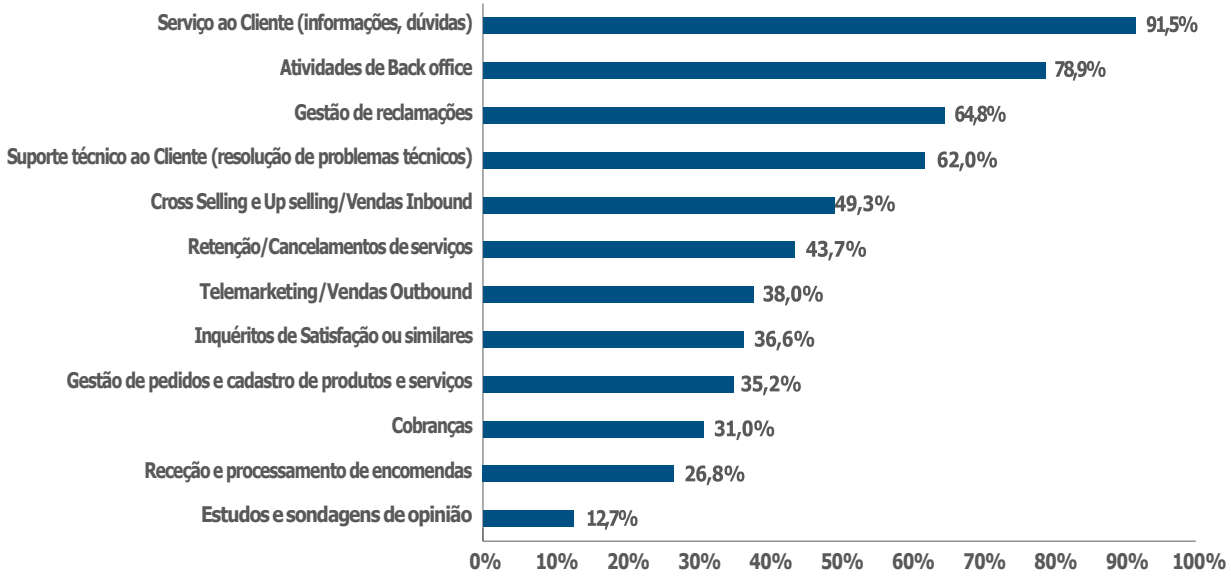


QUESTION: What are the main functions of Contact Centers?

COMMENT: Replicating the results of previous editions, the most relevant functions of the Contact Center are Customer Service and Back Office Activities, with 91.5% and 78.9% responses to this question. As this question allows for multiple answers, Complaint Management stands out with 64.8% and Customer Technical Support with 62%. The least mentioned function is, as always, Surveys and Opinion Polls, mentioned only in 12.7% of the responses.

FIGURE 6

MAIN FUNCTIONS OF CONTACT CENTERS (N=1946)



02

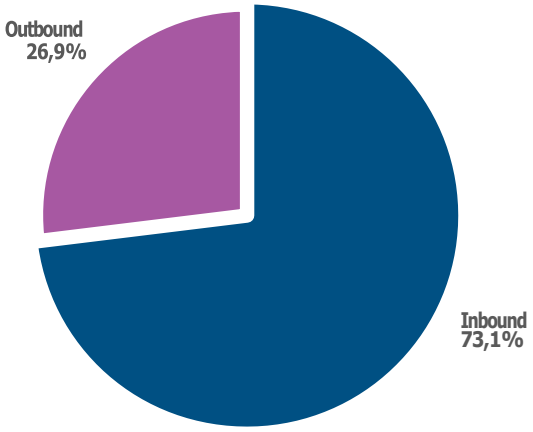
OPERATIONAL PERFORMANCE

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

COMMENT: In the responses to the Benchmarking, Inbound activities (73.1%) largely dominate over Outbound activities (26.9%). This distribution is almost identical to that observed in 2023, confirming the stability of the nature of Contact Center Operations.

FIGURE 7

CONTACTS INBOUND VS OUTBOUND (N=1885)

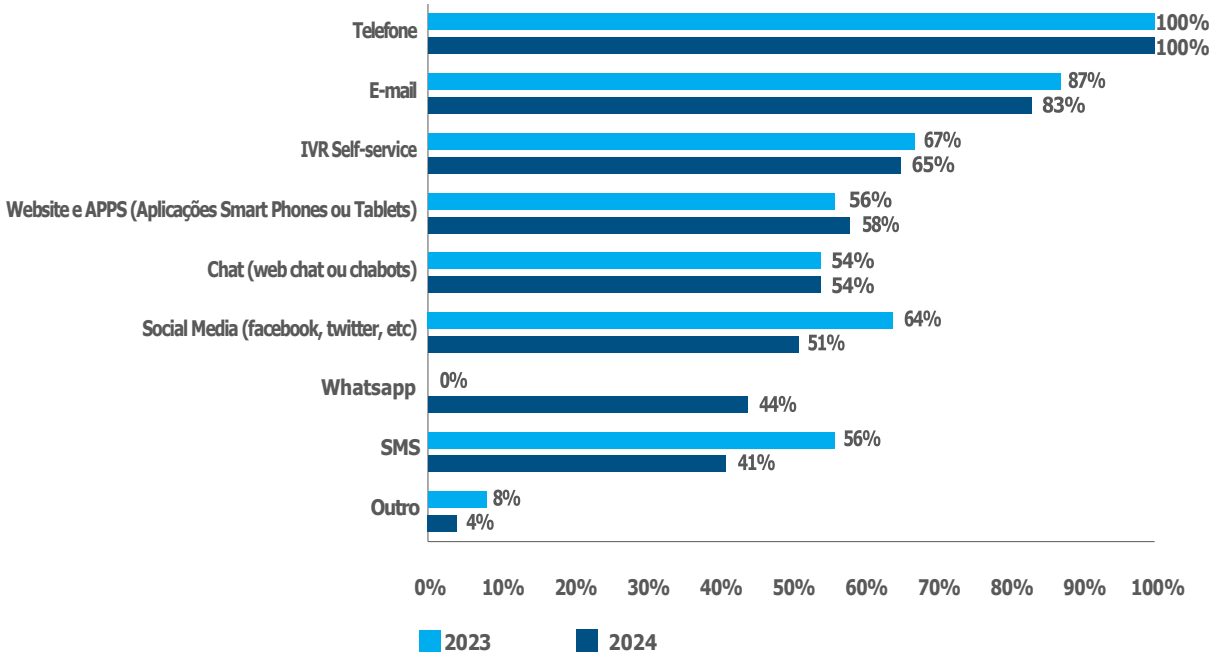


QUESTION: What channels are made available to the Clients by the Contact Centers?

COMMENT: As observed in previous editions of this Study, the Telephone channel maintains its omnipresence across all responding Operations/Service Lines, followed by E-mail, whose prevalence decreased from 87% to 83%. For the first time, the WhatsApp channel was inquired independently of the Social Media channel, registering a response frequency of 44%.

FIGURE 8

CHANNELS MADE AVAILABLE TO THE CLIENTS BY THE CONTACT CENTERS? (N=1946)

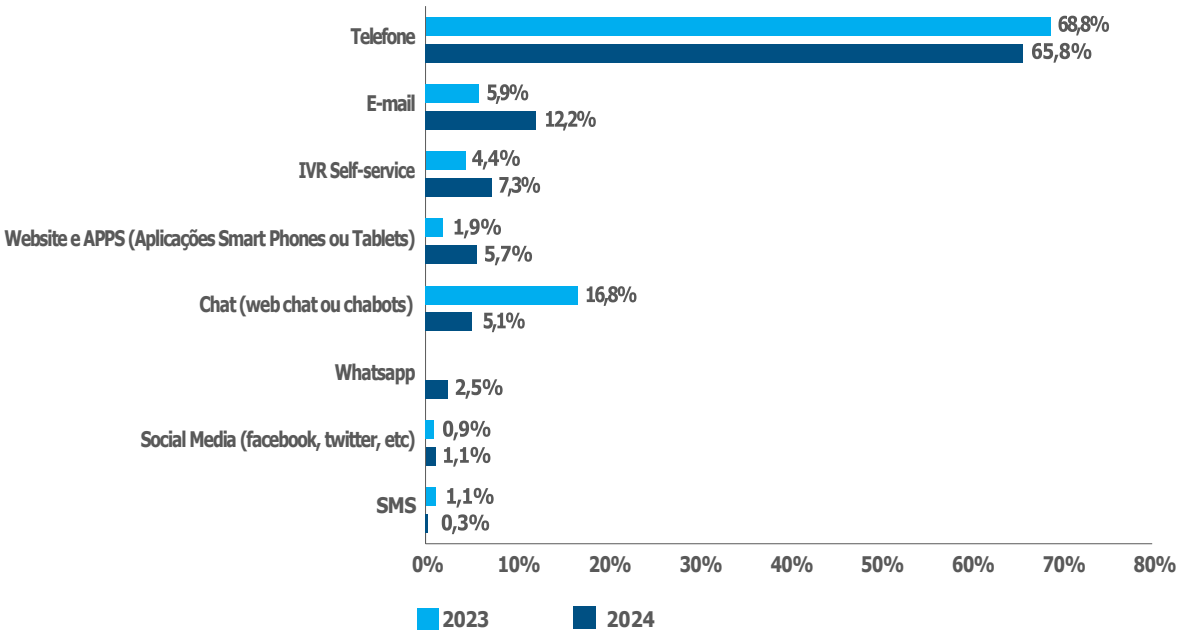


QUESTION: What is the average number of daily Inbound contacts, per channel?

COMMENT: Although remaining the most used channel, the Telephone sees its share reduced from 68.8% to 65.8% of the total contacts, down from 73.2% in 2022. The SMS and Chat channels have also reduced their relative volume of total contacts. On the other hand, the E-mail, IVR Self-service, and Social Media channels have seen an increase. In this last case, it is noteworthy that the Whatsapp channel was surveyed independently for the first time (2.5%).

FIGURE 9

DISTRIBUTION OF INBOUND CONTACTS PER CHANNEL (N=1664)

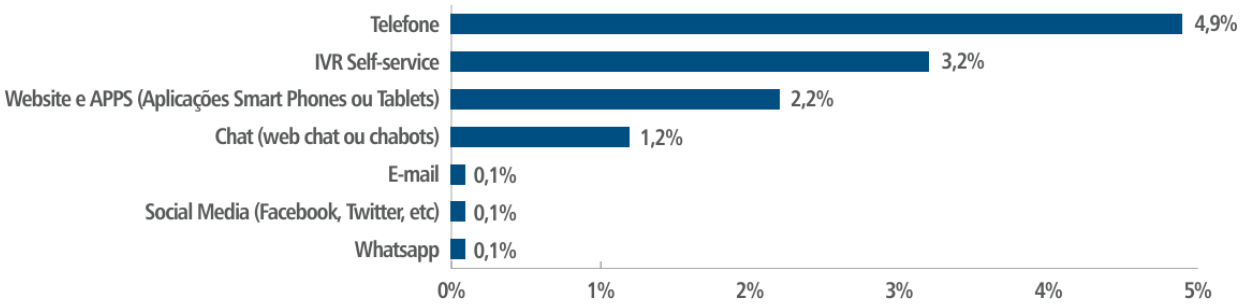


QUESTION: What is the average number of daily abandoned Inbound contacts, per channel?

COMMENT: The highest percentage of dropouts occurs in the Phone channel, which shows an increase from 2023 to 2024 (from 3.5% to 4.9%). For the first time, WhatsApp was presented not integrated into Social Media, showing similar behavior in this indicator.

FIGURE 10

PERCENTAGE OF INBOUND CONTACTS ABANDONED PER CHANNEL (N=1516)

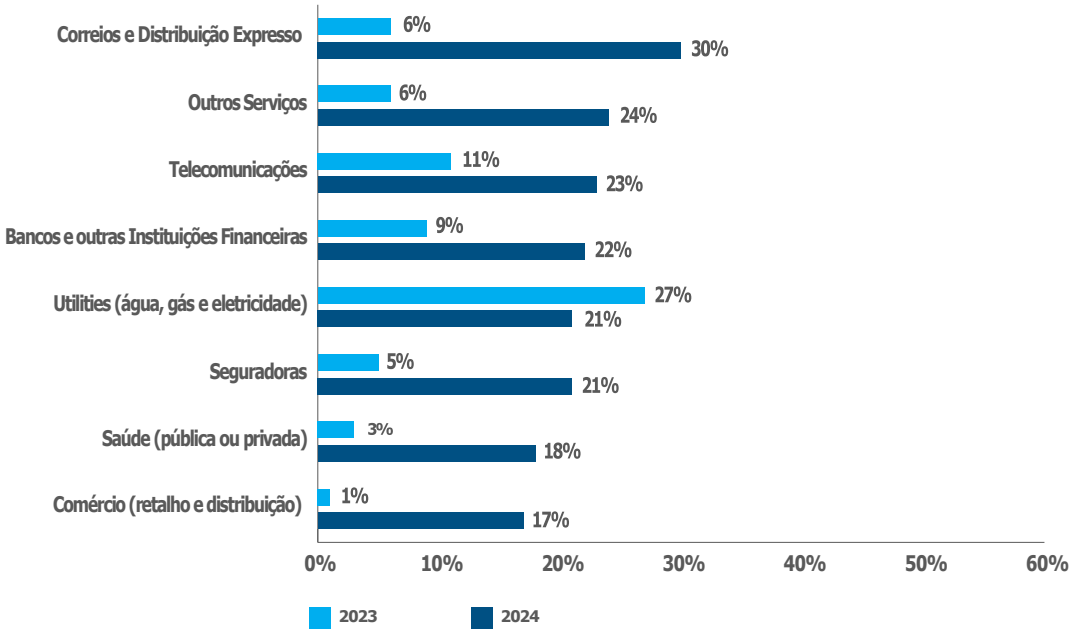


QUESTION: What is the average daily number of Inbound contacts answered by IVR/Bot?

COMMENT: Taking into account the responses obtained to this question, there was a generalized significant growth in the percentage of Inbound contacts handled by IVR/Bot, with quite notable values, ranging from 17% in Retail and Distribution to 30% in Postal Services and Express Delivery. It is worth noting that, among the sectors considered, there was only one reduction, in Utilities (from 27% to 21%).

FIGURE 11

AVERAGE NUMBER OF DAILY INBOUND CONTACTS ANSWERED BY IVR/ BOT (N=1320)

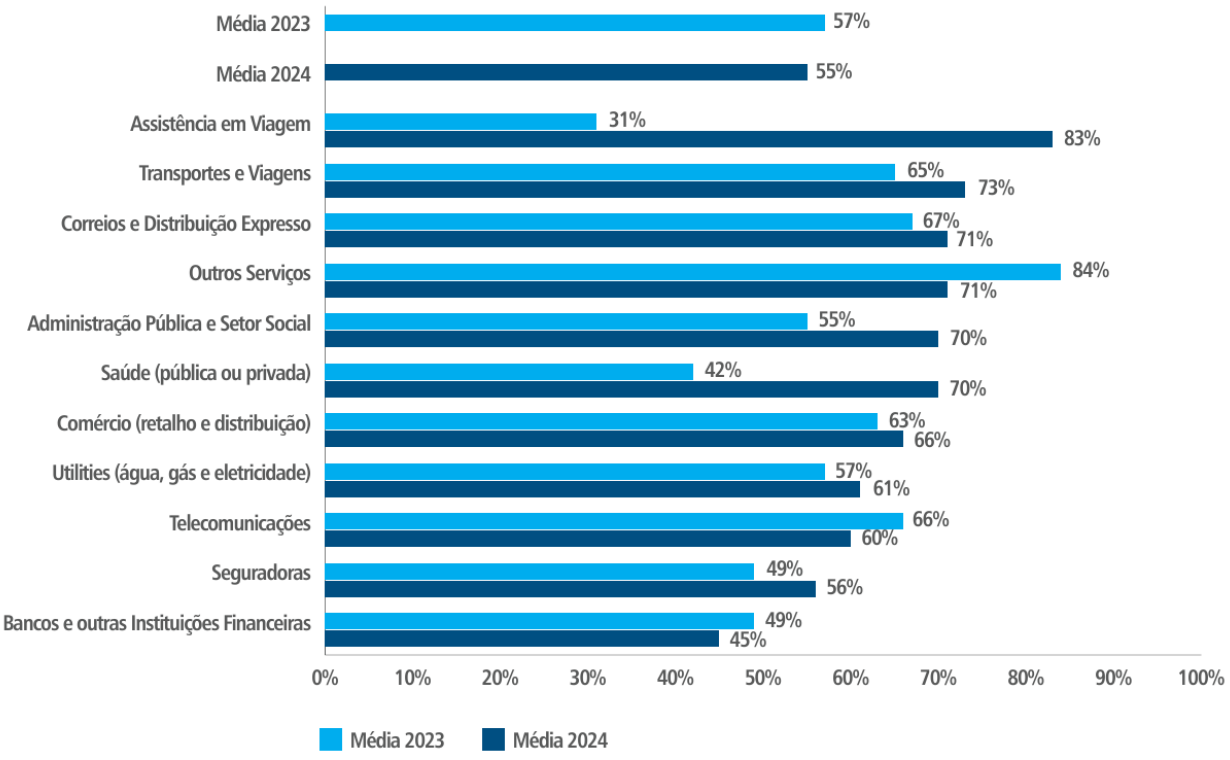


QUESTION: What is the percentage of Inbound contacts answered by IVR/Bot, forwarded to an Agent?

COMMENT: Considering the totality of the sectors included in the sample of this Study, a global reduction was observed, although not very significant, in the percentage of calls handled by IVR/Bot redirected to Agents (from 57% to 55%). The sectors that show growth from 2023 to 2024 are Travel Assistance (the most significant growth, from 31% to 83%), Transportation and Travel (from 65% to 73%), Postal Services and Express Delivery (from 67% to 71%), Public Administration and the Social Sector (from 55% to 70%), Health (Public and Private, from 42% to 70%), Trade (retail and distribution, from 63% to 66%), Utilities (water, gas, and electricity, from 57% to 61%), and Insurance Companies (from 49% to 56%). Other Services show a reduction (from 84% to 71%), as well as Telecommunications (from 66% to 60%) and Banks and other Financial Institutions (from 49% to 45%).

FIGURE 12

PERCENTAGE OF INBOUND CONTACTS ANSWERED BY IVR/BOT, THAT ARE FORWARDED TO AN AGENT (N=798)

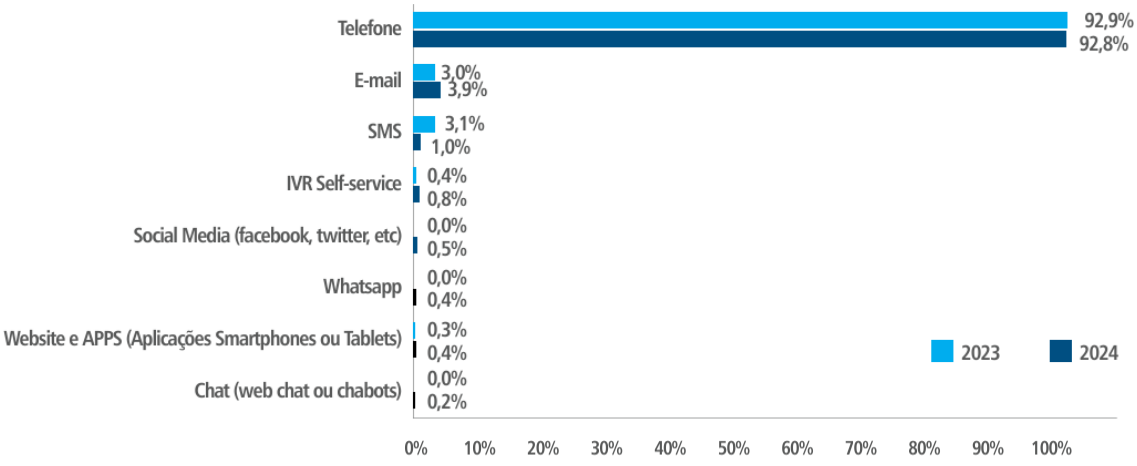


QUESTION: What is the average daily number of Outbound contacts, per channel?

COMMENT: It is not surprising that the Telephone remains, as always, the primary Outbound contact channel, with an insignificant reduction from 2023 to 2024 (from 92.9% to 92.8%). Noteworthy is the increase in the weight of the E-mail channel (from 3.0% to 3.9%) and the reduction of the SMS channel (from 3.1% to 1.0%). It is worth noting that information was requested for the first time about social media (0.5%), Whatsapp (0.4%), and Chat (0.2%).

FIGURE 13

DISTRIBUTION OF OUTBOUND CONTACTS PER CHANNEL (N=1591)

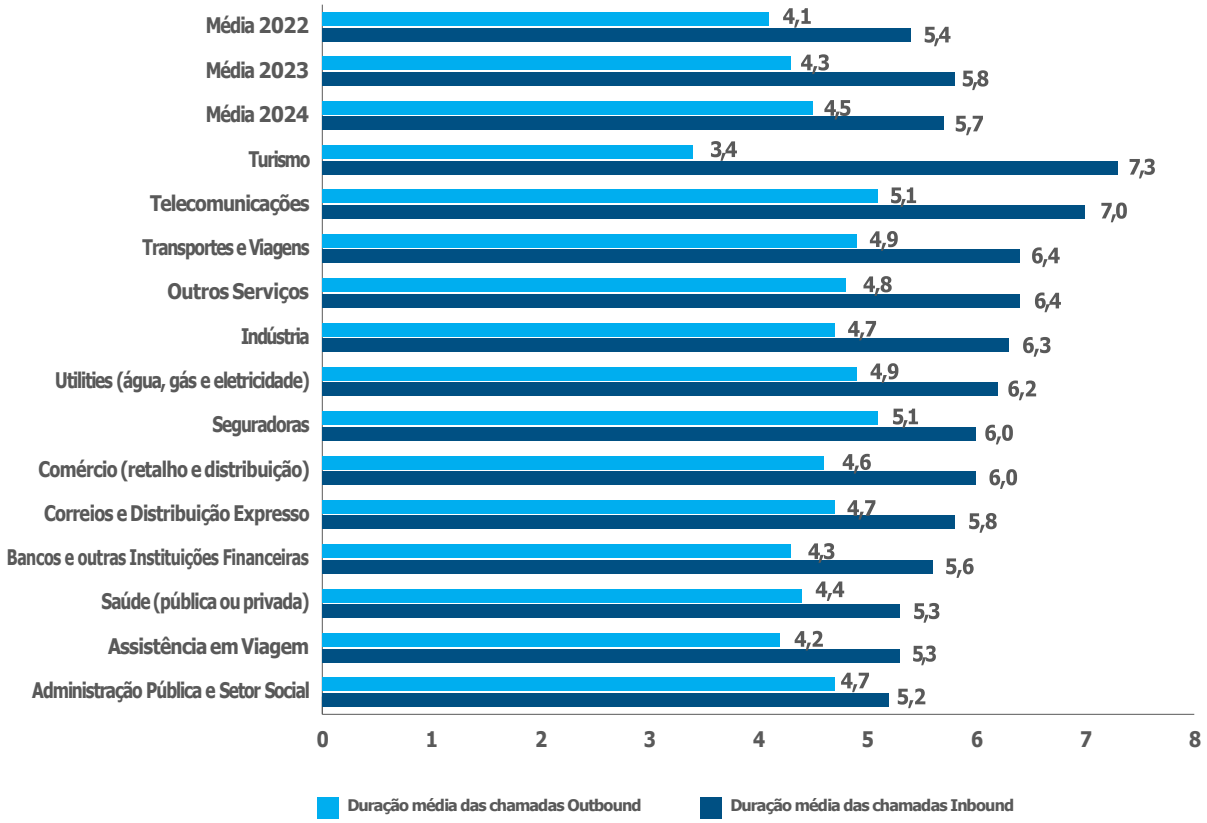


QUESTION: What is the average Handling Time, Inbound and Outbound?

COMMENT: The average duration of calls showed, in 2024, differentiated evolutions between Outbound and Inbound. While the Inbound average decreased from 5.8 to 5.7 minutes, the Outbound average increased from 4.3 to 4.5 minutes. The lowest Inbound averages are in Public Administration and Social Sector (5.2 minutes) and Health (public and private) and Travel Assistance (both at 5.3 minutes); the worst Inbound averages are in Tourism (7.3 minutes) and Telecommunications (7 minutes). Regarding Outbound, Insurance and Telecommunications stand out, with the highest values (5.1 minutes) and Tourism, with the lowest value (3.4 minutes).

FIGURE 14

AVERAGE HANDLING TIME (IN MINUTES) (N=1748)

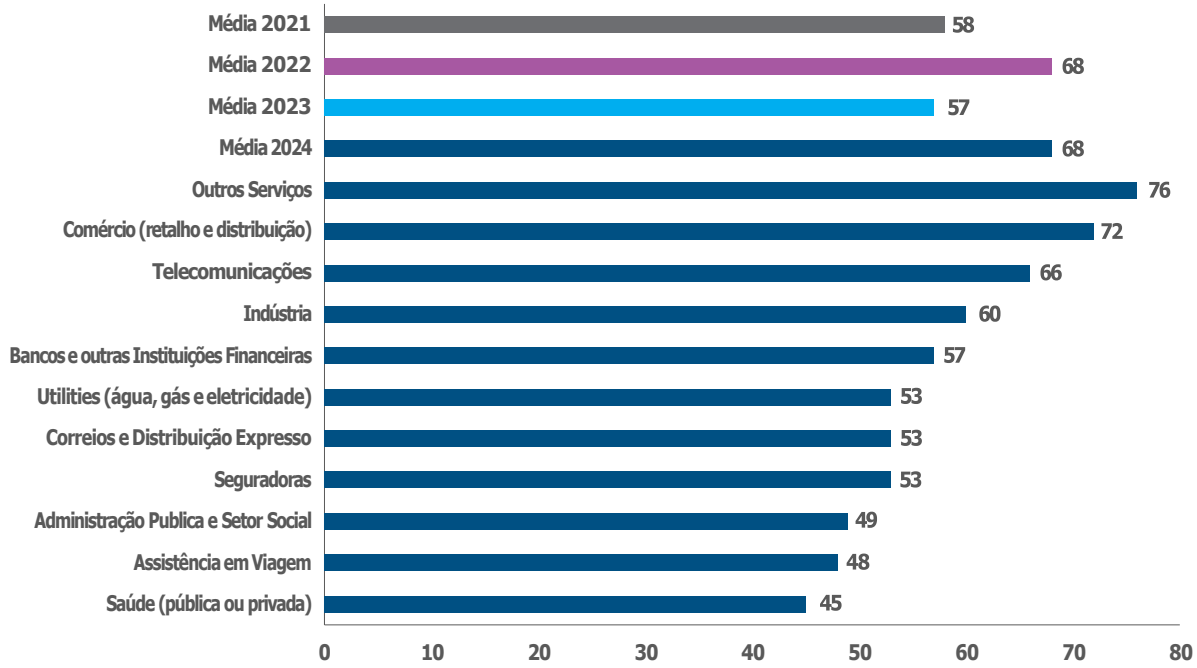


QUESTION: What is the average Hold Time?

COMMENT: In the KPI for pause time, the average value recorded returns to 68 seconds, which was observed in 2022, when in 2023 a significant improvement was noted, to 57 seconds. The sectors with the highest Hold are Commerce (72") and Other Services (76"). The best performances are found in Health (public and private, 45"), Travel Assistance (48") and Public Administration and the Social Sector (49").

FIGURE 15

AVERAGE HOLD TIME (IN SECONDS) (N=1339)



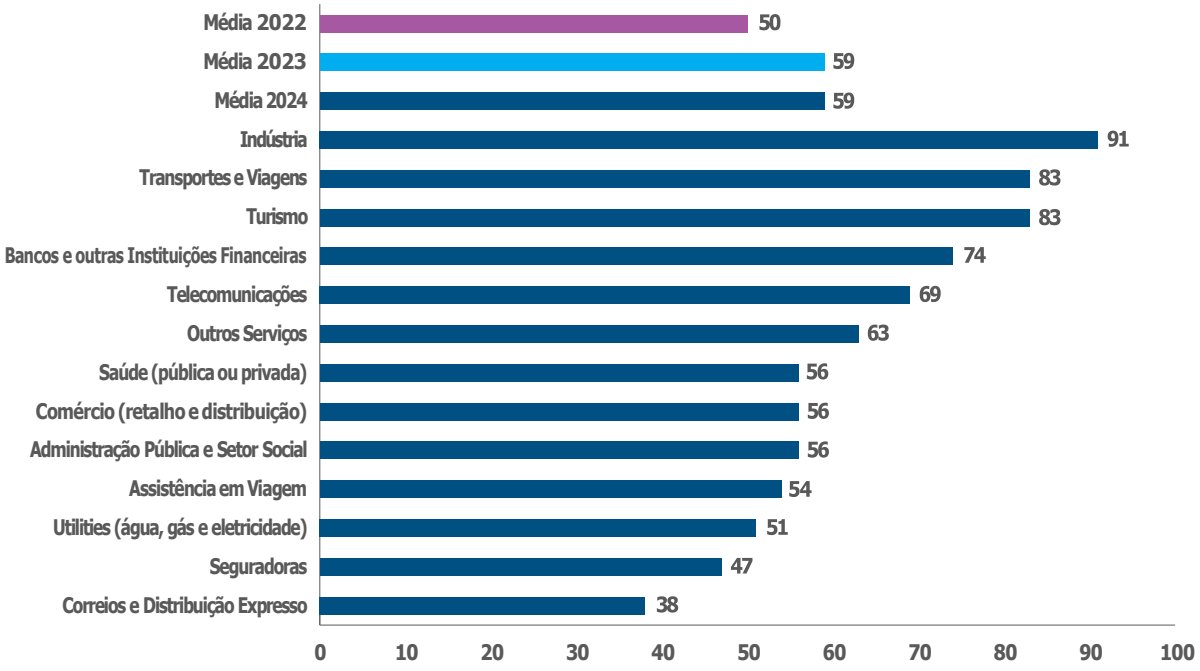
QUESTION: What is the average time to be served by the Contact Center?

COMMENT: There is a stabilization of the value observed in this indicator, remaining at 59" in 2024, just as in 2023. The sectors with the best performance are the Postal Service and Express Distribution (38") and Insurers (47"), while the highest values occurred in Industry (91"), Tourism, and Transportation and Travel (both with 83").

FIGURE 16

AVERAGE TIME TO BE SERVED BY THE CONTACT CENTER (IN SECONDS)

(N=1549)

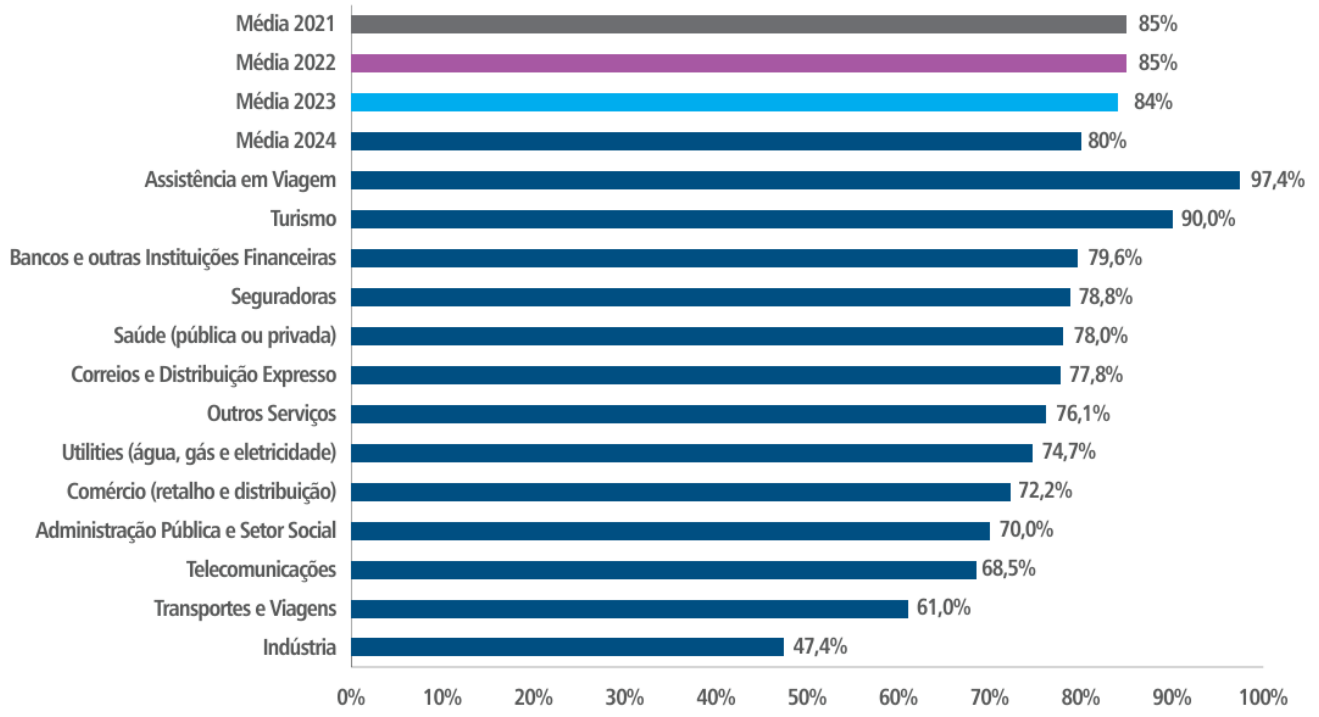


QUESTION: What is the net First Contact Resolution rate?

COMMENT: In the first contact resolution rate, which showed stability between 2021 and 2023 (85% and 84%), there was a significant decline in 2024, to 80%. This decline was felt across the entire Contact Center Industry, with only Tourism and Travel Assistance improving compared to the previous year. These are the two sectors with the best performance (90% and 97.4%, respectively). The lowest values are found in Industry (47.4%) and in Transport and Travel (61%).

FIGURE 17

NET FIRST CONTACT RESOLUTION RATE (N=1197)

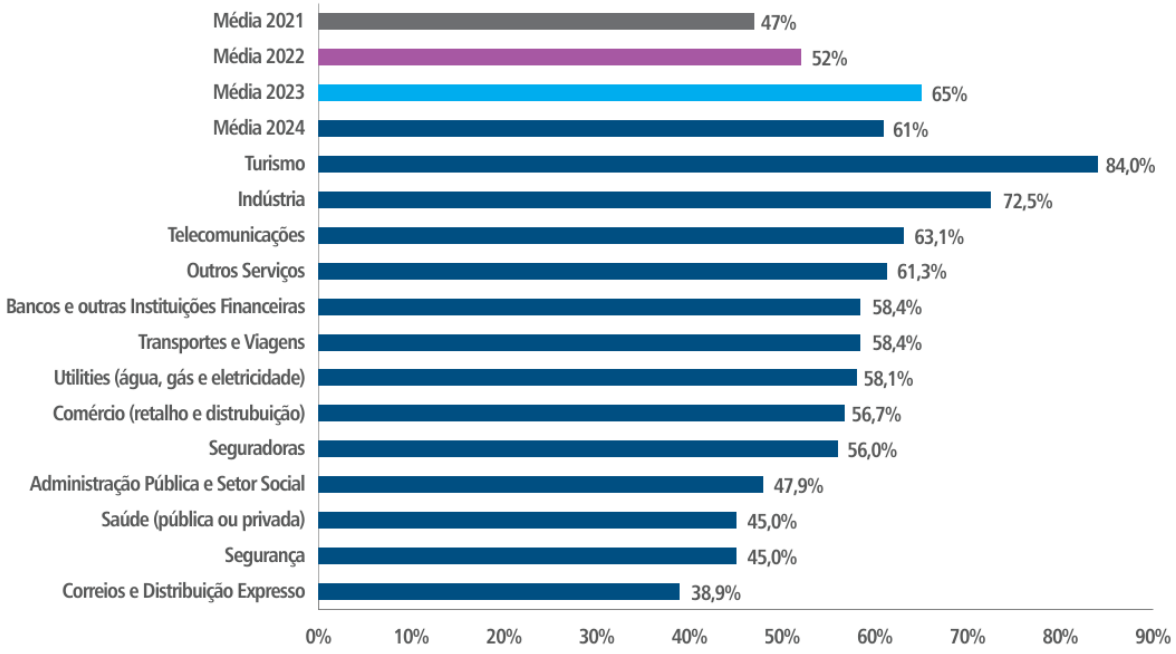


QUESTION: What is the percentage of success of Inbound Customer retention contacts?

COMMENT: The decrease in this KPI, from 65% to 61%, is set at a value much higher than what was recorded in 2021 and 2022. The sectors with the best performance are Tourism (84%) and Industry (72.5%), while the lowest values are for Post and Express Distribution (38.9%) and Health (both public and private) and Security, both at 45%.

FIGURE 18

PERCENTAGE OF SUCCESS OF INBOUND CUSTOMER RETENTION CONTACTS (N=647)

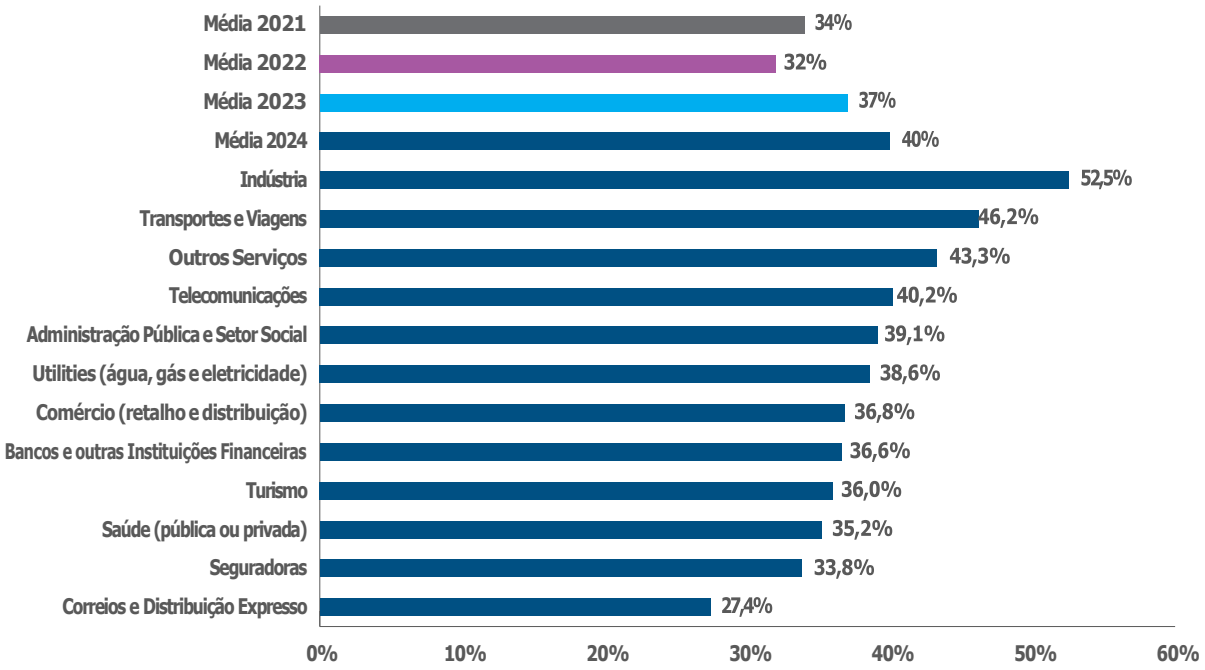


QUESTION: What is the percentage of success of Outbound Customer retention contacts?

COMMENT: Contrary to what we observed in Inbound retention, Outbound retention saw a significant improvement from 2023 to 2024 (from 37% to 40%). In this indicator, the Industry stands out (52.5%) and Transport and Travel (46.2%), with the worst performances being in Postal Services and Express Distribution (27.4%) and in Insurers (33.8%).

FIGURE 19

PERCENTAGE OF SUCCESS OF OUTBOUND CUSTOMER RETENTION CONTACTS (N=690)

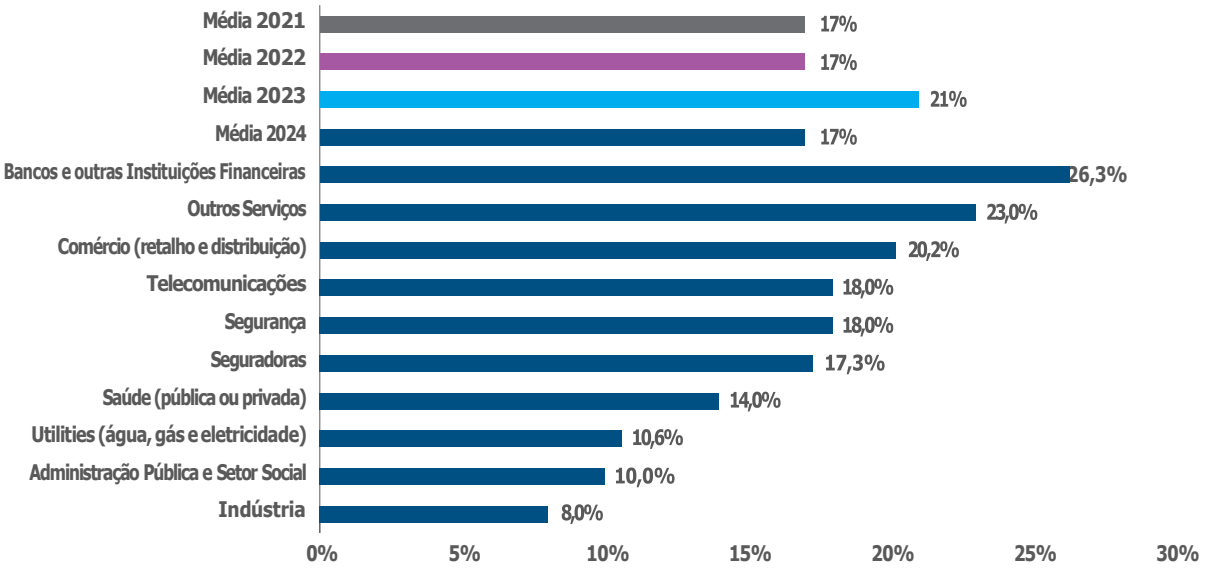


QUESTION: What is the percentage of successful sales in Outbound contacts, per sector?

COMMENT: This KPI performed very negatively in 2024, dropping from 21% to 15%, a figure that is even below what occurred in the previous two years. The highest success rates in Outbound sales calls occur in Banks and other Financial Institutions (26.3%) and in Other Services (23%). The lowest success rates are found in Industry (8%).

FIGURE 20

PERCENTAGE OF SUCCESSFUL SALES IN OUTBOUND CONTACTS, PER SECTOR (N=726)



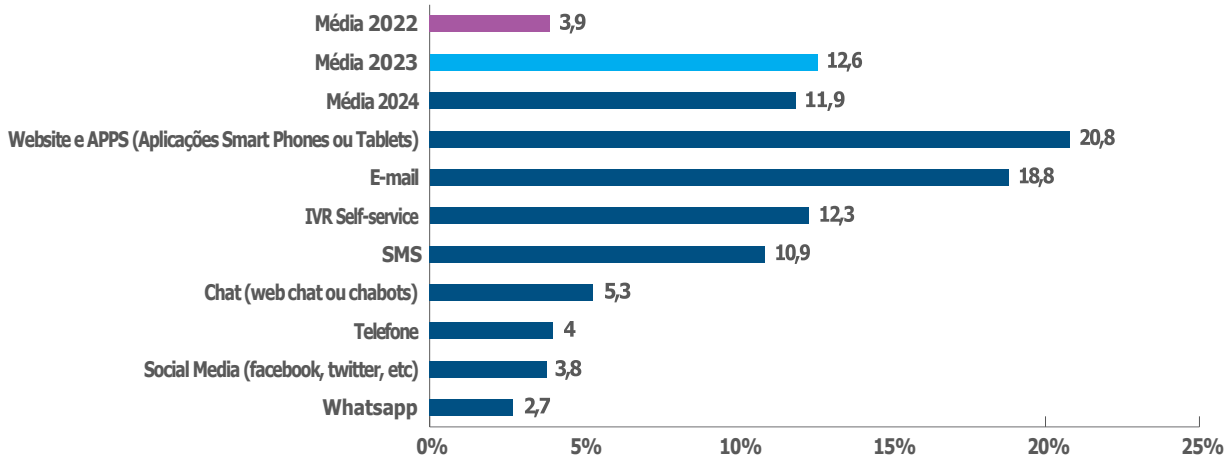
QUESTION: What is the average time for request solving, excluding complaints, per channel?

COMMENT: The channel with the best request resolution time in 2024 was WhatsApp (2.7 hours), which was mentioned independently of Social Media survey (3.8 hours) for the first time. The channel with the worst performance is the Website and Apps, with 20.8 hours.

FIGURE 21

AVERAGE TIME FOR REQUEST SOLVING, EXCLUDING COMPLAINTS, PER CHANNEL (IN HOURS)

(N=1372)



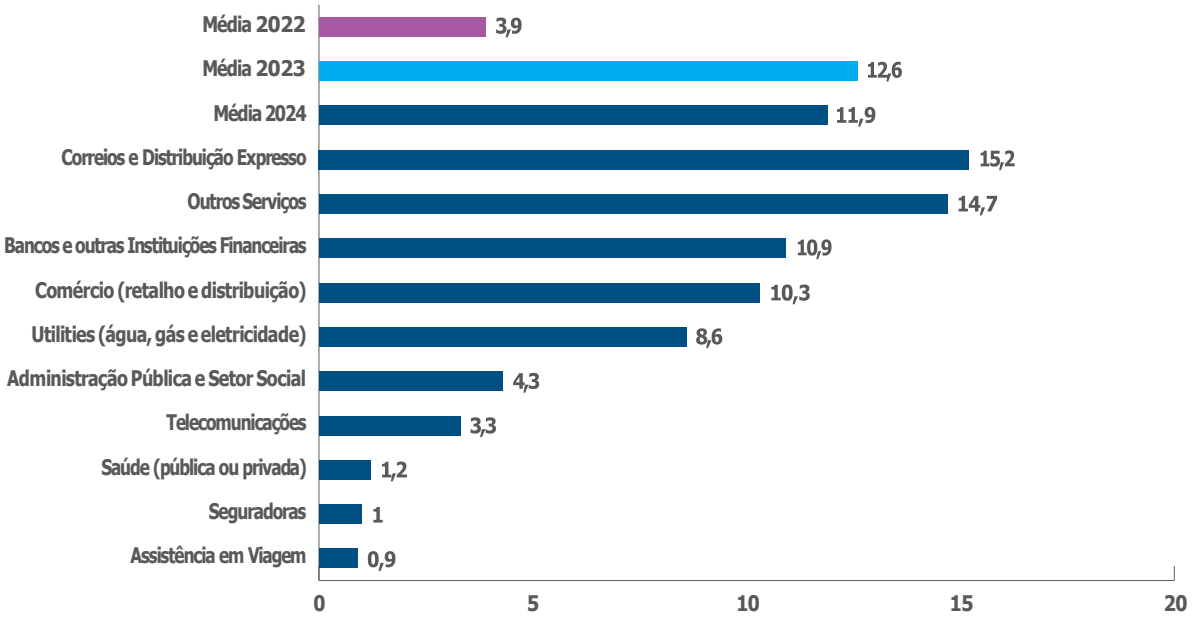
QUESTION: What is the average time for request solving, excluding complaints, per Sector?

COMMENT: In 2024, it was possible to initiate a partial recovery from the significant worsening observed in this indicator, changing from 12.6 to 11.9 hours. The sectors that show the shortest average resolution time for requests are Travel Assistance (0.9 hours) and Insurance Companies (1 hour). The highest average times occur in Postal Services and Express Distribution (15.2 hours) and in Other Services (14.7 hours).

FIGURE 22

AVERAGE TIME FOR REQUEST SOLVING, EXCLUDING COMPLAINTS, PER SECTOR (IN HOURS)

(N=1203)

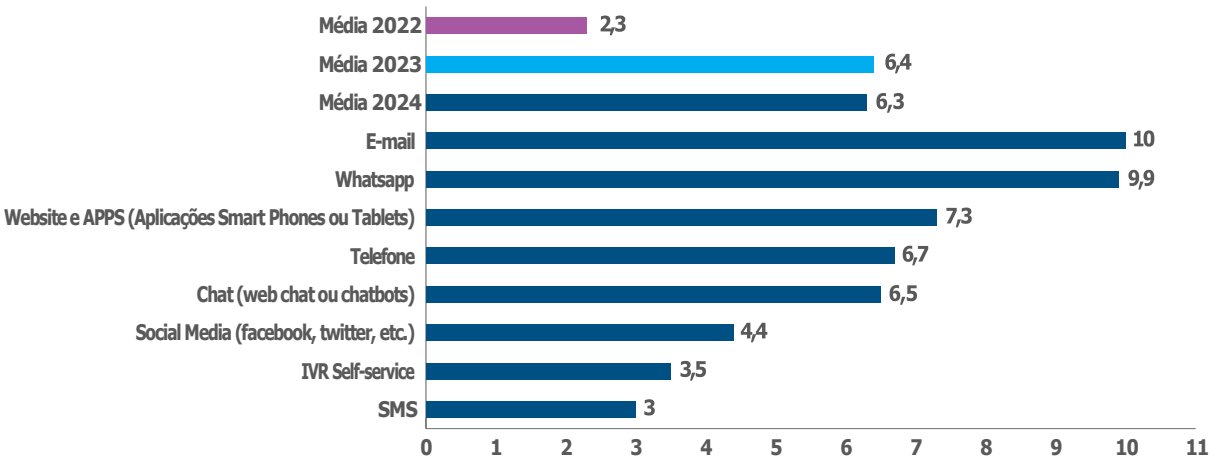


QUESTION: What is the average complaint resolution time, per channel?

COMMENT: In 2024, the average resolution time for complaints remains similar to that of 2023 (6.3 days in 2024 and 6.4 days in 2023), but considerably higher than in 2022 (2.3 days). The lowest average resolution times for complaints were recorded in the SMS channels (3 days) and IVR Self-service (3.5 days). The worst performances occurred in the Whatsapp (9.9 days) and Email (10 days) channels.

FIGURE 23

AVERAGE COMPLAINT RESOLUTION TIME, PER CHANNEL (IN DAYS) (N=1207)

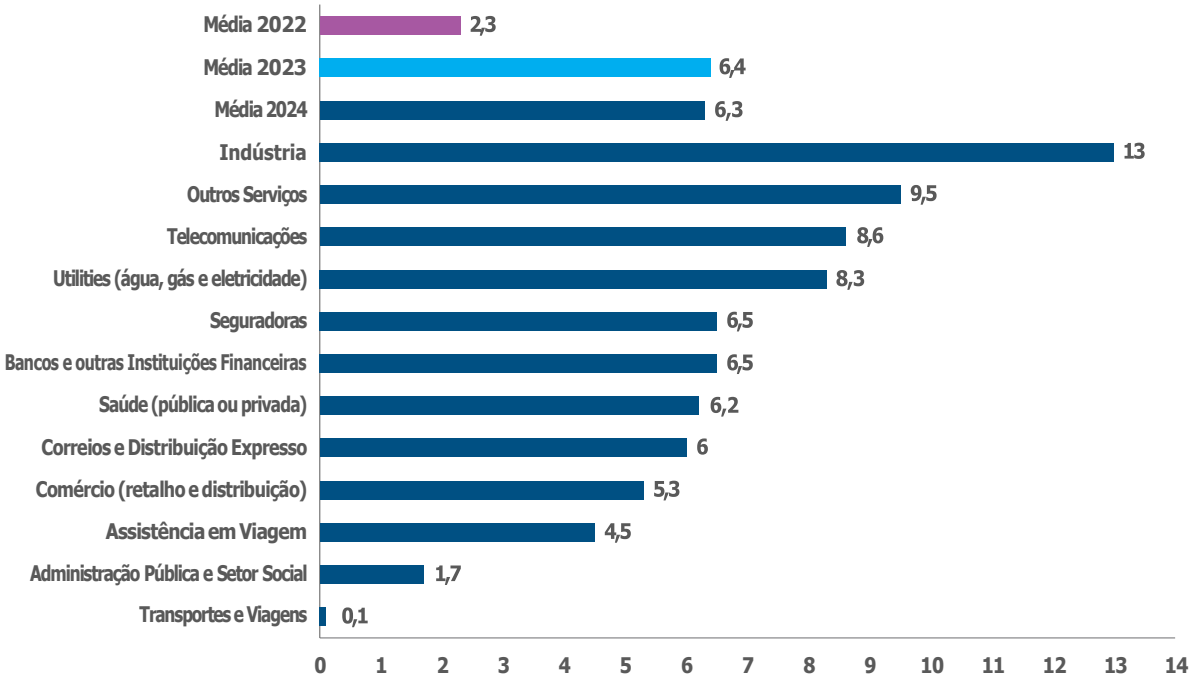


QUESTION: What is the average complaint resolution time, per sector?

COMMENT: This indicator shows a marginal decrease compared to 2023, from 6.4 to 6.3 days. The sectors with the lowest average resolution times for complaints are Transport and Travel (0.1 days) and Public Administration and Social Sector (1.7 days). The sectors with the highest values are Industry (13 days) and Other Services (9.5 days).

FIGURE 24

AVERAGE COMPLAINT RESOLUTION TIME, PER SECTOR (IN DAYS) (N=1096)



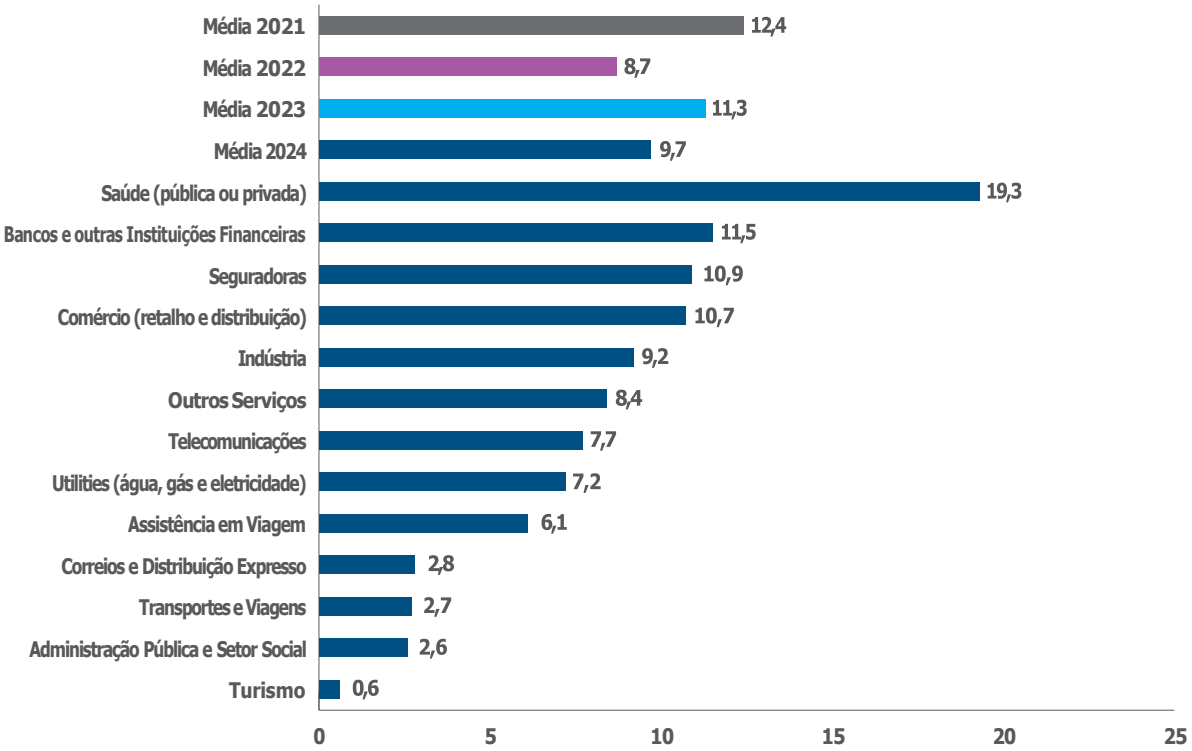
QUESTION: What is the average number of written requests answered by an Agent, per hour, per sector?

COMMENT: The average number of written requests in 2024 shows a decrease compared to the previous year, from 11.3 to 9.7 requests answered, which is still a more favourable record than that of 2022 (8.7). The sectors with the best performance are Health (public and private), with 19.3 requests answered, and Banks and other Financial Institutions, with 11.5. The least successful performances are in Tourism (0.6) and Public Administration and the Social Sector (2.6).

FIGURE 25

AVERAGE NUMBER OF WRITTEN REQUESTS ANSWERED BY NA AGENT, PER HOUR, PER SECTOR

(N=1146)



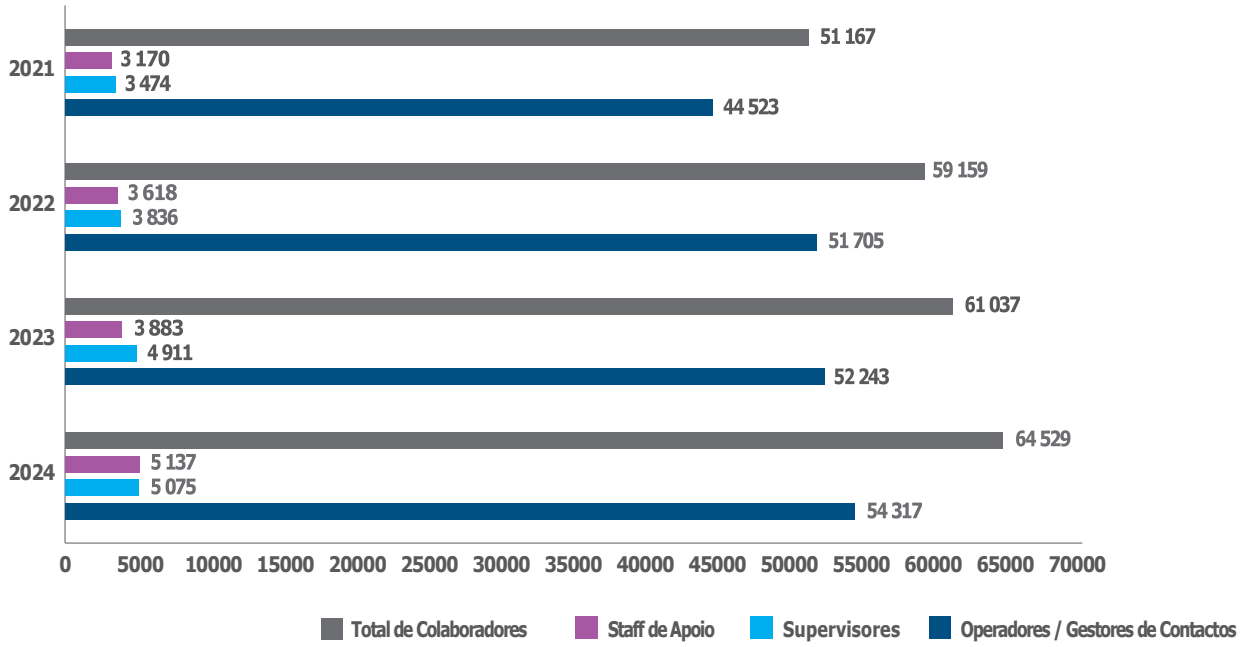
03 HUMAN RESOURCES

QUESTION: What is the total number of Human Resources involved in Contact Center operations? Please indicate the number of Agents, the number of Supervisors and the total of Support Staff?

COMMENT: In this edition of the Benchmarking Study, the total number of Employees from the responding Operations/Service Lines was 64,529, which is an increase of 5.7% compared to the total for 2023. Of this total number, 84.2% are Agents, 7.9% are Supervisors, and the remaining 8% are Support Staff. It is worth noting that this figure exceeds 56% of the total number of Employees in the Contact Center Industry in Portugal, which highlights the representativeness and accuracy of the data presented in this Study. Although we are pleased with the achieved number, it is worth noting that this growth of 5.7% falls short of what would be expected given the increase in the number of responding Operations/Service Lines. It is noteworthy that, for the first time, the number of resources allocated to Support Staff is greater than the number of Supervisors.

FIGURE 26

TOTAL OF HUMAN RESOURCES IN THE OPERATIONS IN THIS STUDY (N=1950)

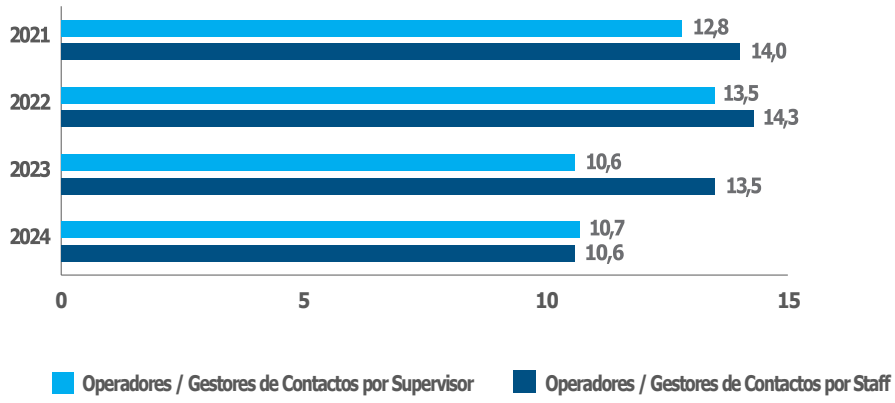


QUESTION: What is the total number of Human Resources involved in Contact Center operations? Please indicate the number of Agents, the number of Supervisors and the total of Support Staff?

COMMENT: The value reported in the ratio of Agents per Support Staff (10.6) is the lowest ever, compared to the ratio of 13.5 recorded in 2023. As for the number of Agents per Supervisor, there was a slight increase in 2024, from 10.6 to 10.7.

FIGURE 27

HUMAN RESOURCES RATIOS IN THE OPERATIONS OF THE STUDY (N=1950)

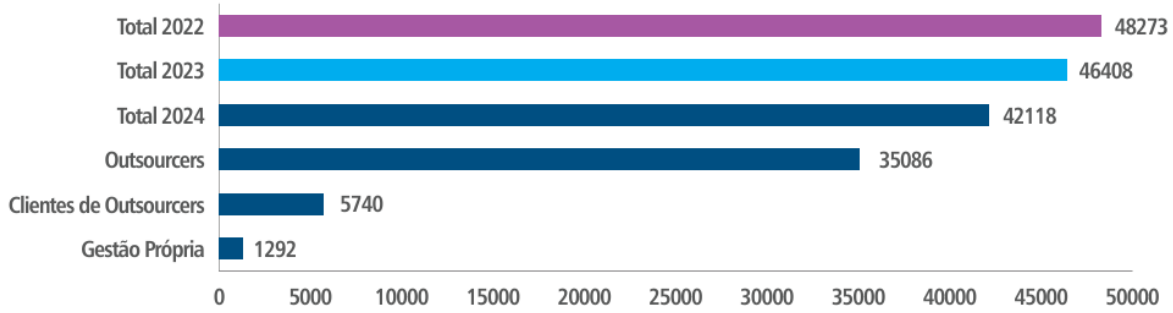


QUESTION: What is the average number of full time Contact Center Employees (FTE), in Inbound and Outbound activities?

COMMENT: Despite the increase in the number of Employees, which was 5.7%, the number of FTEs for 2024 shows a reduction of 9.2% compared to what was recorded in 2023. This fact, which has been repeating since 2022, is partly due to 6.1% of respondents not having indicated any value on this issue.

FIGURE 28

AVERAGE NUMBER OF FULL TIME CONTACT CENTER EMPLOYEES, IN INBOUND AND OUTBOUND ACTIVITIES (N=1831)

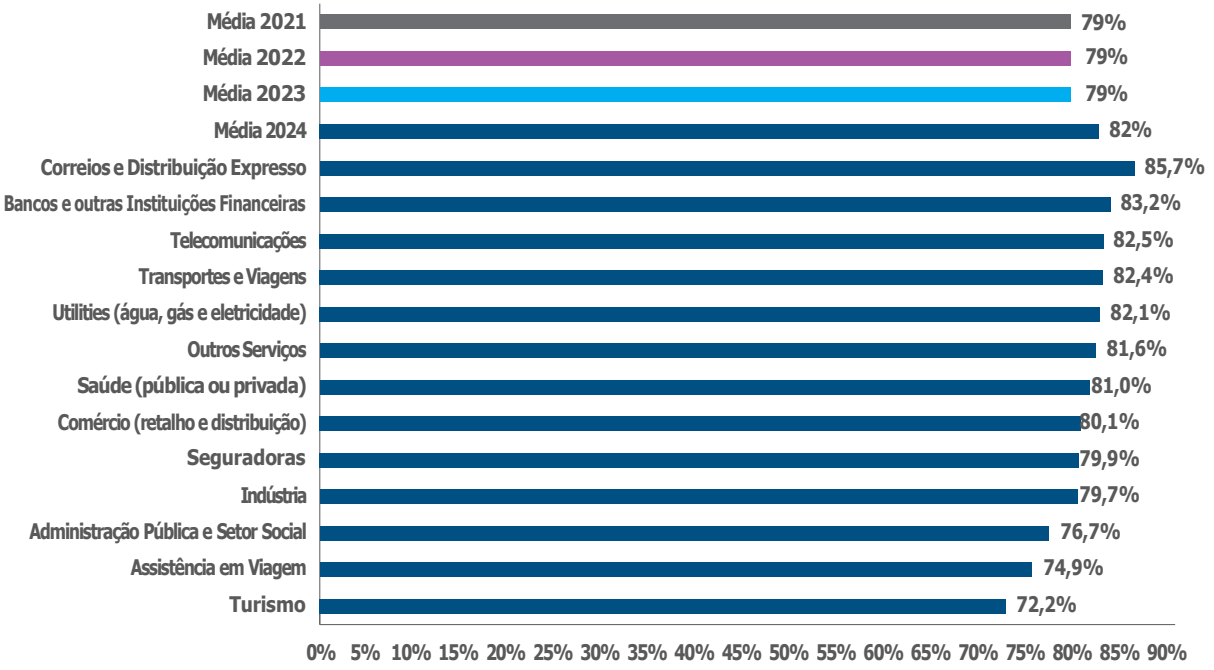


QUESTION: What is the average Human Resources occupancy rate?

COMMENT: After three consecutive years with the same value in this KPI (79%), in 2024 we recorded an increase to 82%. The sectors with the highest occupancy rates are Postal Services and Express Distribution (85.7%) and Banks and other Financial Institutions (83.2%). The lowest occupancy rates are in Travel Assistance (74.9%) and Tourism (72.2%).

FIGURE 29

AVERAGE HUMAN RESOURCES OCCUPANCY RATE (N=1621)



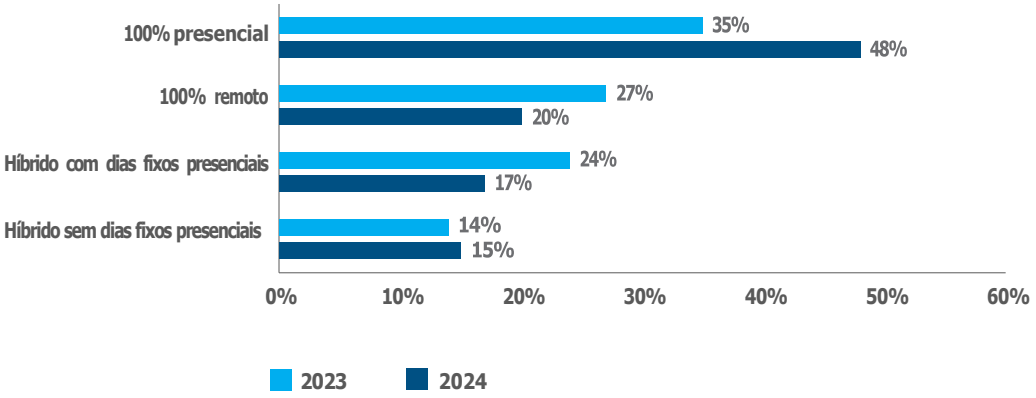
QUESTION: In 2024, what was the percentage of Contact Center Employees working in each presential / non presential regimes?

COMMENT: In 2023, a new reduction of 7% was observed in the 100% remote regime, while a 13% increase was noted in the 100% presential regime. Concerning hybrid regimes, two changes were identified: the option with fixed presential days now represents 17% of the total Employees (down from 24% in 2023), and the option without fixed presential days increased from 14% to 15%.

FIGURE 30

PERCENTAGE OF EMPLOYEES PER PRESENTIAL / NON PRESENTIAL REGIMES (PRESENT DAYS)

(N=1919)

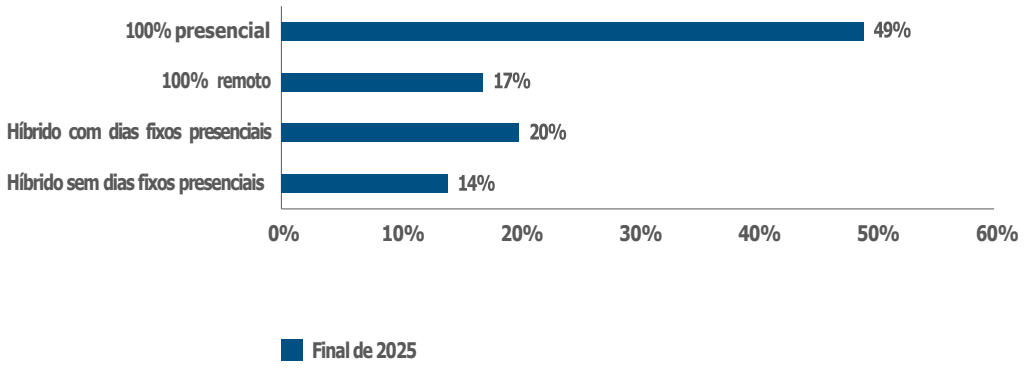


QUESTION: At the end of 2025, what do you consider will be the distribution of Contact Center Employees per presential / non presential regimes?

COMMENT: Considering the distribution at the end of 2024, across the four regimes, the forecast for the end of 2025 indicate a new reduction in Employees working 100% remotely (from 20% to 17%) and a slight increase in Employees working 100% on-site (from 48% to 49%). On the side of hybrid regimes, the option with fixed on-site days will increase by 3% (from 17% to 20%), while the option without fixed on-site days will see a decrease of 1% (from 15% to 14%). Thus, hybrid arrangements will evolve from 32% to 34%.

FIGURE 31

PERCENTAGE OF EMPLOYEES PER PRESENTIAL / NON PRESENTIAL REGIMES (EXPECTED BY THE END OF 2025) (N=1859)



QUESTION: What is the distribution of Employees per level of education completed?

COMMENT: The most common educational qualifications among Contact Center Employees are completed Secondary Education (56.6%) and completed University Education (30%). The remaining levels considered, in order of magnitude, are attendance in University Education (9.9%), Basic Education (2.8%), and attendance in Secondary Education (0.7%). Regarding 2023, there was a marginal reduction in the percentage of Employees with University Education (from 30.8% to 30%, returning to the value of 2022). The most significant increase occurred among Employees attending University Education (from 7.5% to 9.9%).

The sectors with the highest prevalence of Employees with a completed University education are Tourism, at 35%, and Industry and Travel Assistance, both at 33%. The lowest percentages of Employees with completed University education are found in Postal Services and Express Distribution (24%) and in Telecommunications (27%). Industry is the sector where we find the highest percentage of Employees with basic education (10%).

FIGURE 32

DISTRIBUTION OF EMPLOYEES PER LEVEL OF EDUCATION COMPLETED (N=1576)

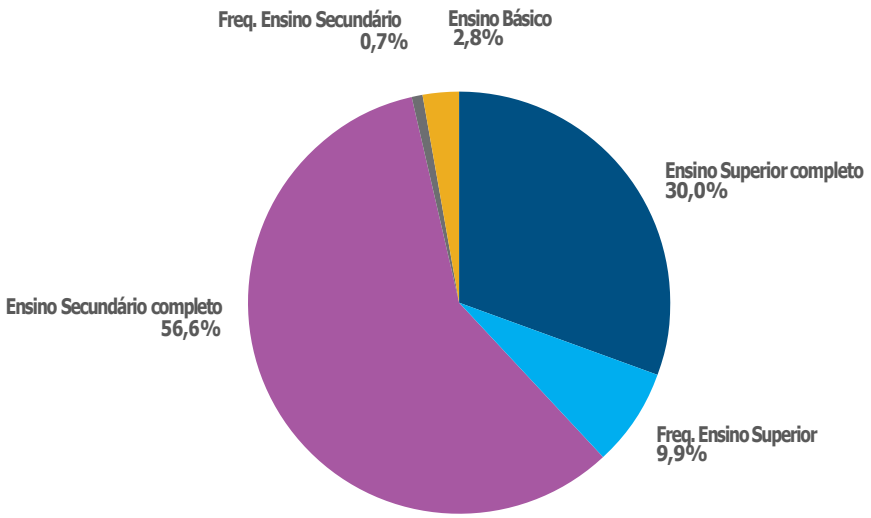
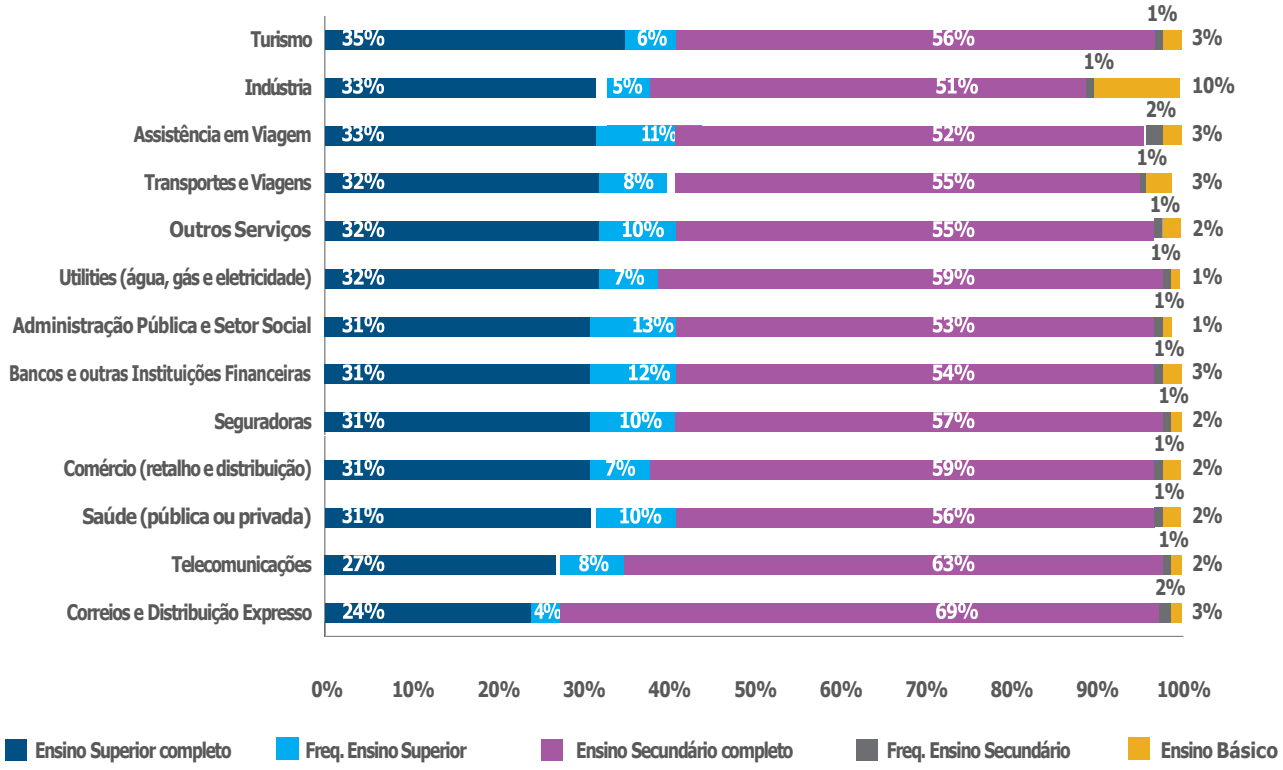


FIGURE 33

DISTRIBUTION OF EMPLOYEES PER LEVEL OF EDUCATION COMPLETED, PER SECTOR (N=1576)



QUESTION: Are Employee satisfaction enquiries conducted? What is the frequency of those enquiries? What are the results of the enquiries, in the last year (scale 0 to 100%)?

COMMENT: 88% of the Operations/Customer Service respondents indicated that they conduct Employee satisfaction surveys, a percentage higher than that recorded in 2023 (84%). The most usual frequency remains annual, and its relative weight has slightly increased, from 49% in 2023 to the current 50%. Quarterly frequency was mentioned in 23% of cases and semi-annual in 13%. The average rating achieved in 2024 was 77%, again lower than that recorded in the last three years. The sectors with the highest ratings were Utilities (81%) and Postal and Express Distribution (80%). The lowest ratings were recorded in Travel Assistance (60%) and Industry (64%).

FIGURE 34

EMPLOYEE SATISFACTION ENQUIRIES CONDUCTED (N=1924)

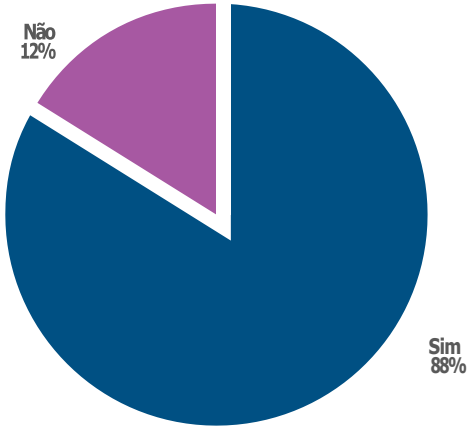


FIGURE 35

FREQUENCY OF THE ENQUIRIES (N=1770)

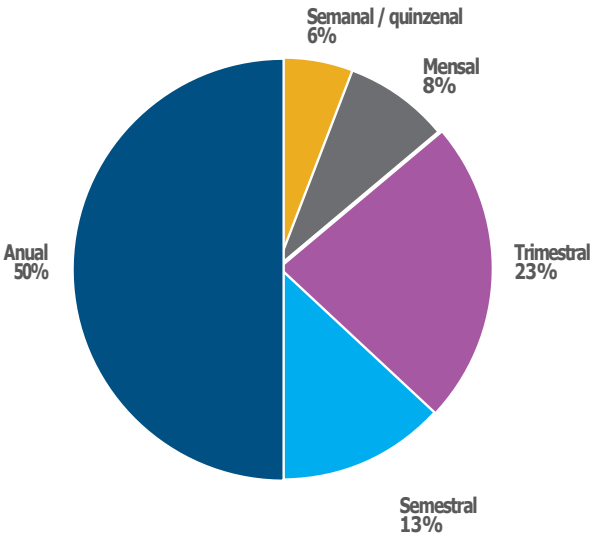
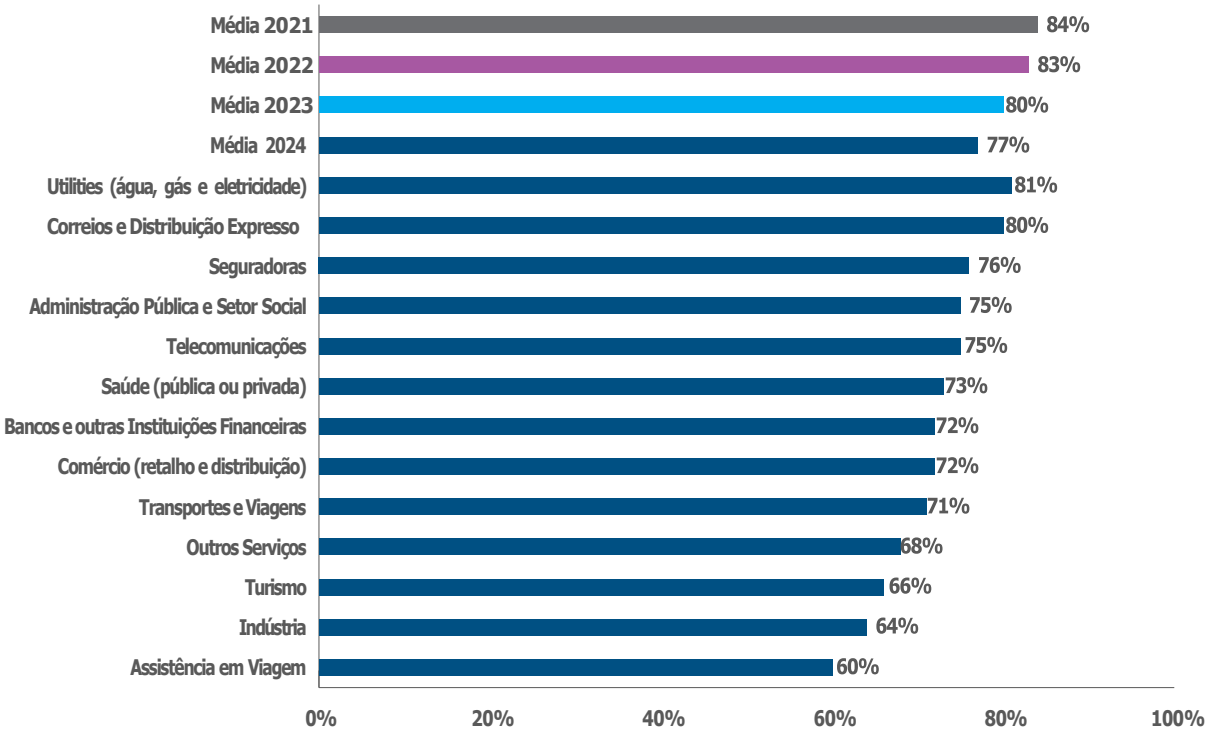


FIGURE 36

RESULTS OF THE ENQUIRIES (N=1236)

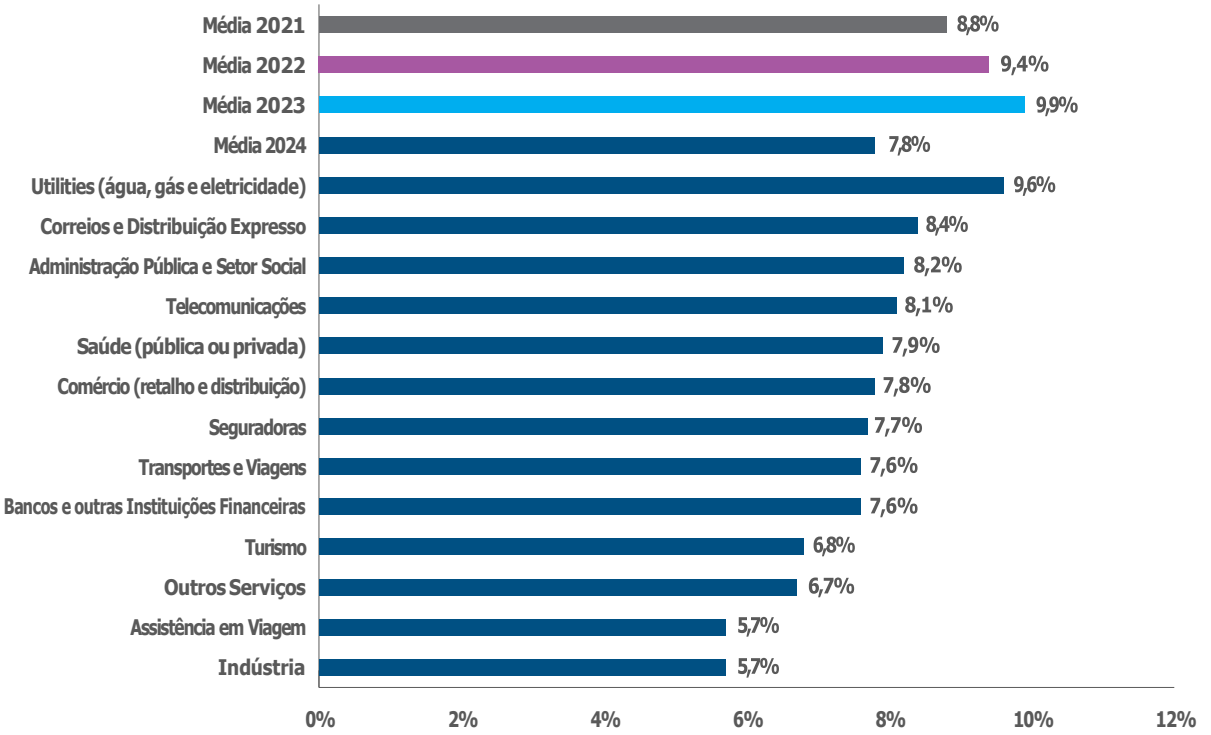


QUESTION: What was the Agents' absenteeism rate in 2024?

COMMENT: After four years of growth in the average absenteeism rate, we observe a significant reduction in this indicator in 2024, from 9.9% to 7.8%, a value even lower than that recorded in 2020. The sectors where absenteeism among Agents is lowest are Industry and Travel Assistance (both at 5.7%). The highest absenteeism rates are found in Utilities (9.6%) and in Mail and Express Distribution (8.4%).

FIGURE 37

AVERAGE AGENTS' ABSENTEEISM RATE (N=1883)

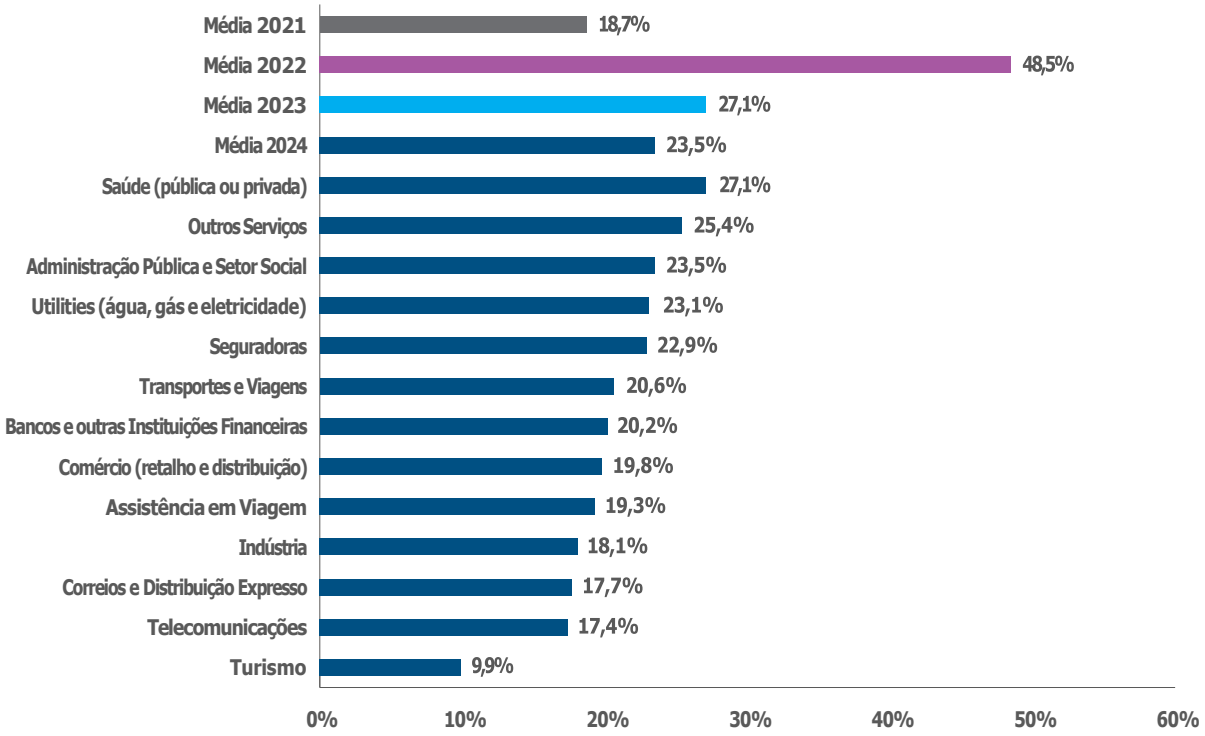


QUESTION: What was the Agents' turnover rate in 2024?

COMMENT: In 2024, the recovery of this KPI's value continued, after reaching 48.5% in 2022. However, the observed value (23.5%) is still considerably higher than what occurred in 2021 (18.7%), remaining well above the values of 2020 (20.2%) and of 2021 (18.7%). The sectors with the highest turnover rate are Healthcare (27.1%) and Other Services (25.4%). The sectors with the best performance in this indicator are Tourism (9.9%) and Telecommunications (17.4%).

FIGURE 38

AGENTS' TURNOVER RATE (N=1876)

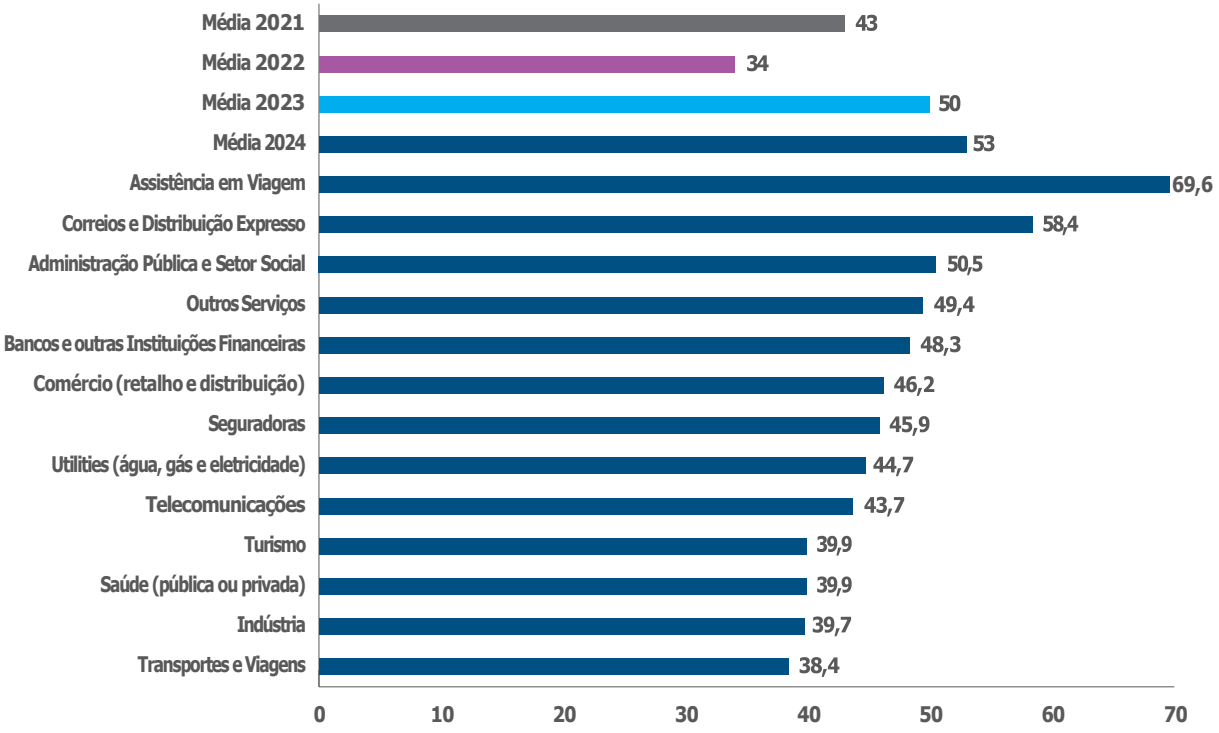


QUESTION: What is the average seniority of Agents?

COMMENT: The seniority of Agents saw a modest increase in 2024 compared to the previous year, rising from 50 to 53 months. The highest seniorities were found in Travel Assistance (69.6 months) and Express Mail and Distribution (58.4 months). At the opposite end are Industry (39.7 months) and Transport and Travel (38.4 months).

FIGURE 39

AVERAGE SENIORITY OF AGENTS (IN MONTHS) (N=1724)

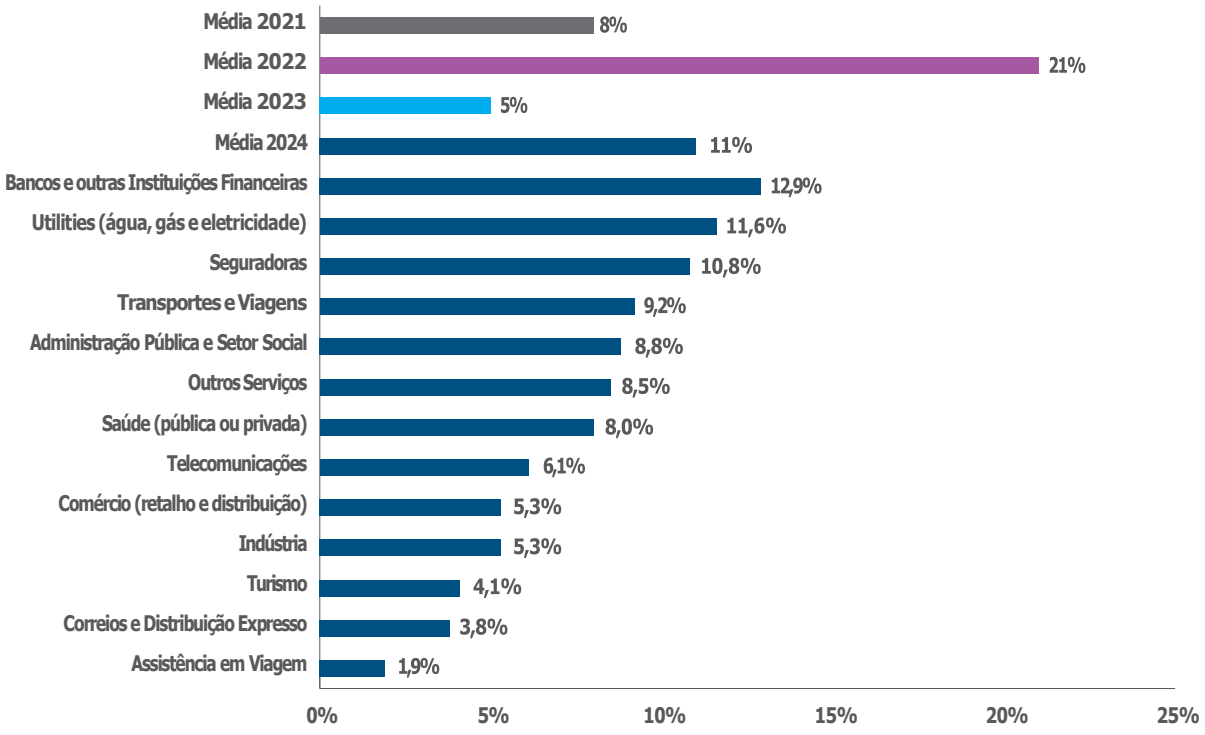


QUESTION: What was the Supervisors' turnover rate in 2024?

COMMENT: The turnover of Supervisors shows a significant increase, from 5% to 11%. This growth was largely contributed by Banks and other Financial Institutions (12.9%), Utilities (11.6%), and Insurers (10.8%). The lowest turnover rates were recorded in Travel Assistance (1.9%) and in Post and Express Distribution (3.8%).

FIGURE 40

SUPERVISORS' TURNOVER RATE (N=1753)

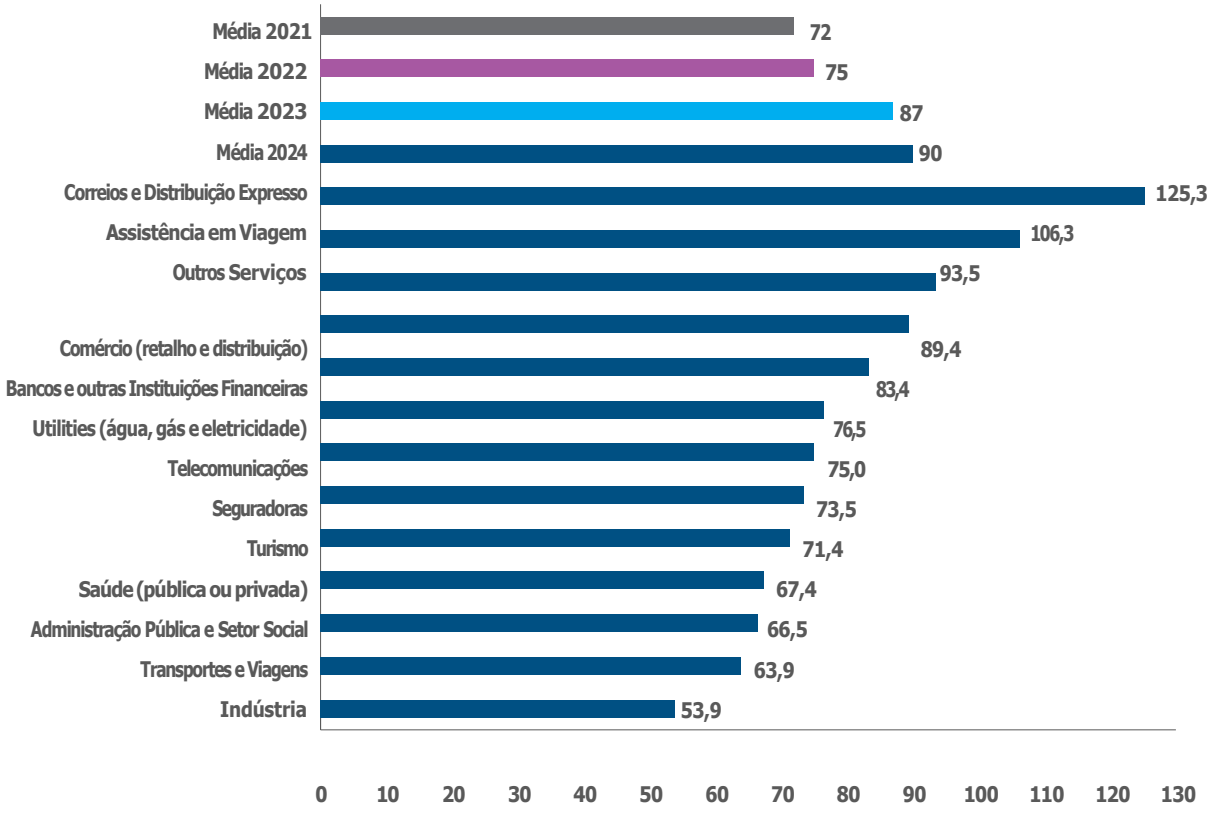


QUESTION: What is the average seniority of Supervisors?

COMMENT: As observed in Agents, there was a slight increase in the average seniority of Supervisors compared to 2023 (from 87 to 90 months). The sectors with the highest average seniority are Postal Services and Express Distribution (125.3 months) and Travel Assistance (106.3 months). The lowest seniorities are found in Industry (53.9 months) and Transport and Travel (63.9 months).

FIGURE 41

AVERAGE SENIORITY OF SUPERVISORS (IN MONTHS) (N=1737)



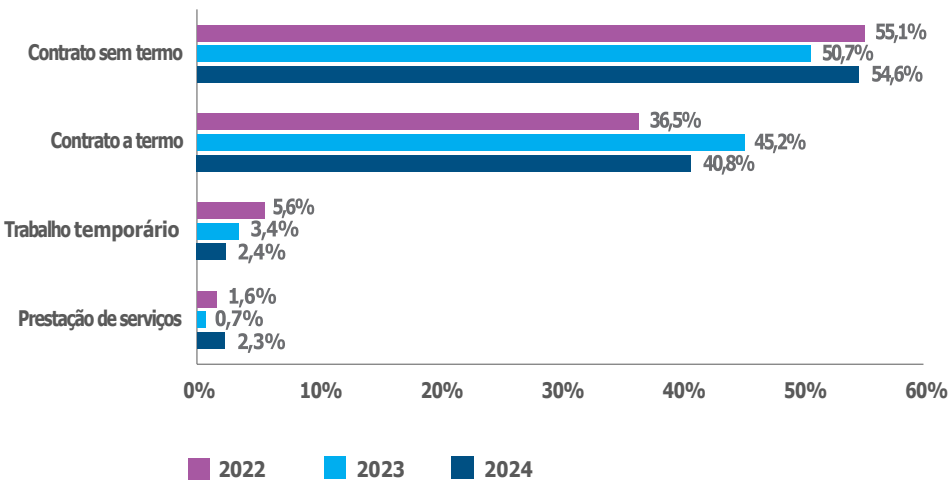
QUESTION: What is the distribution of Employees per type of contract?

COMMENT: In 2024, we found that the percentage of Permanent Contracts has nearly fully recovered from the reduction that occurred in 2023, now standing at 54.6%. This figure is still lower than that of 2022, which was 55.1%. This increase of 3.9% was accompanied by a reduction of 4.4% in Fixed-Term Contracts and 1% in Temporary Work. The total of Permanent Contracts + Fixed-Term Contracts increased from 95.9% in 2023 to 96.1% in 2024. The percentage of Employees hired under Temporary Work has dropped to its lowest level ever, 2.4%, while we noted an increase of Service Providers from 0.7% to 2.3%, a figure clearly explained by the nature of activities involving liberal/independent professions.

FIGURE 42

DISTRIBUTION OF CONTACT CENTER EMPLOYEES PER TYPE OF CONTRACT

(N=1863)

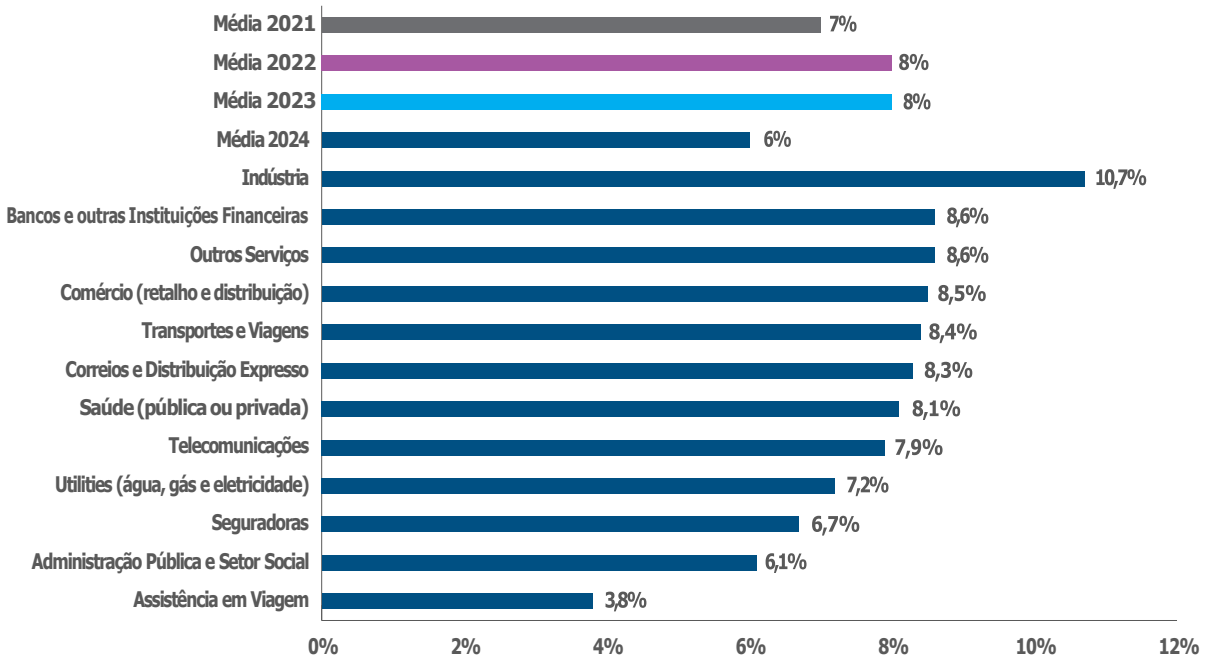


QUESTION: What is the percentage of Contact Center Employees that have access to other functions within the Organization?

COMMENT: The percentage of Employees acceed to other roles within the Organization shows, in 2024, a lower value than what was recorded in 2023 (6% instead of 8%, respectively). The sectors where this practice is most common are Industry (10.7%), Banks and other Financial Institutions, and Other Services (both at 8.6%). On the other hand, the sectors where this procedure is least frequent are Public Administration and the Social Sector (6.1%) and Travel Assistance (3.8%).

FIGURE 43

CONTACT CENTER EMPLOYEES THAT HAVE ACCEESS TO OTHER FUNCTIONS WITHIN THE ORGANIZATION (N=1832)



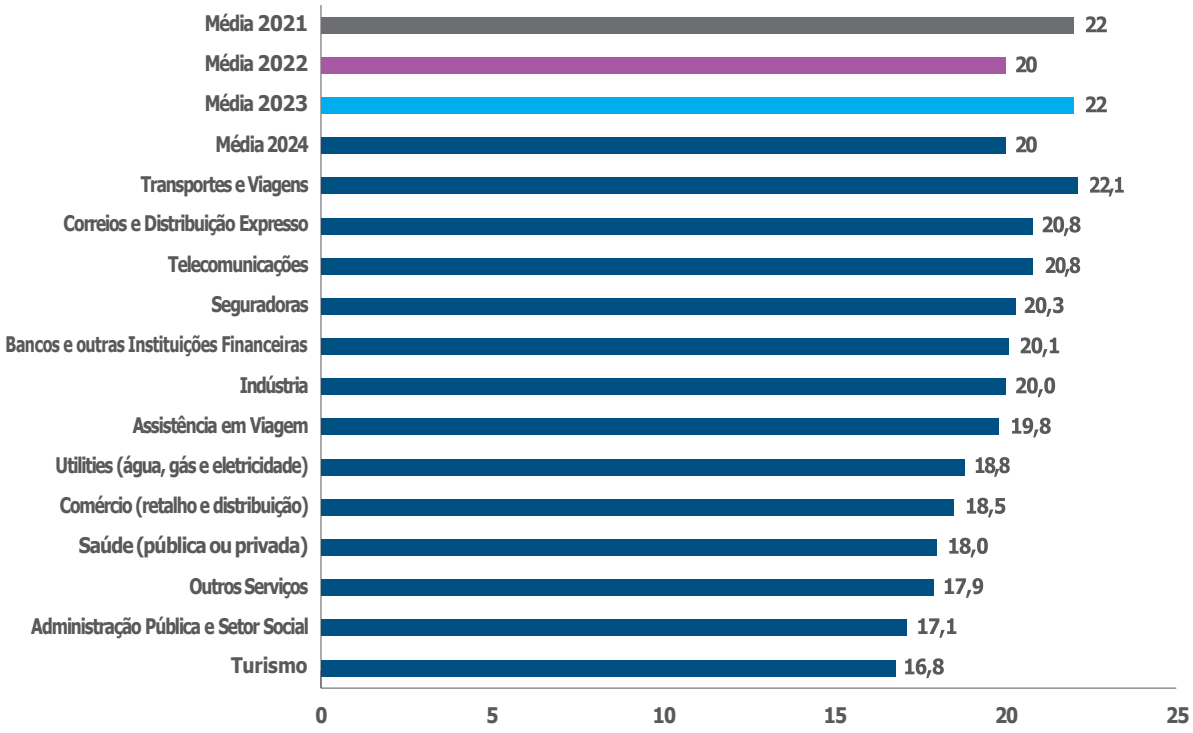
QUESTION: What is the average duration of initial training of a new Contact Center Employee?

COMMENT: After the average time to train a new Employee increased in 2023, it decreased again in 2024, matching the record of 2022 (20 days). It is worth noting that in 2020, this value was 24 days. The sectors where this average time is highest are Transport and Travel (22.1 days) and Postal and Express Distribution and Telecommunications (both with 20.8 days). The shortest average times are found in Tourism (16.8 days) and in Public Administration and the Social Sector (17.1 days).

FIGURE 44

AVERAGE TIME OF INICIAL TRAINING OF A NEW CONTACT CENTER EMPLOYEE (IN DAYS)

(N=1861)

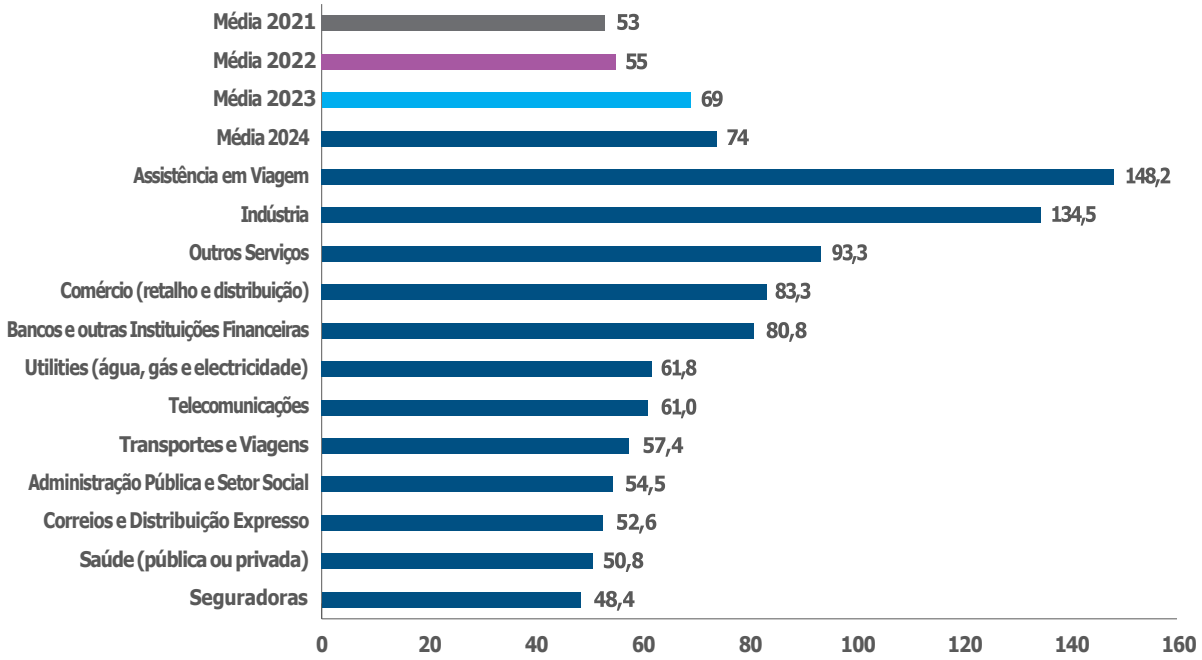


QUESTION: What is the annual number of training hours, including refresh, per Agent?

COMMENT: This indicator continues to rise, as in the past three years, reaching an average of 74 hours per year in 2024. The sectors with the longest annual training duration are Travel Assistance (148.2 hours) and Industry (134.5 hours). The sectors with the least volume are Insurers (48.4 hours) and Health (50.8 hours).

FIGURE 45

NUMBER OF ANNUAL TRAINING HOURS, PER AGENT (N=1570)

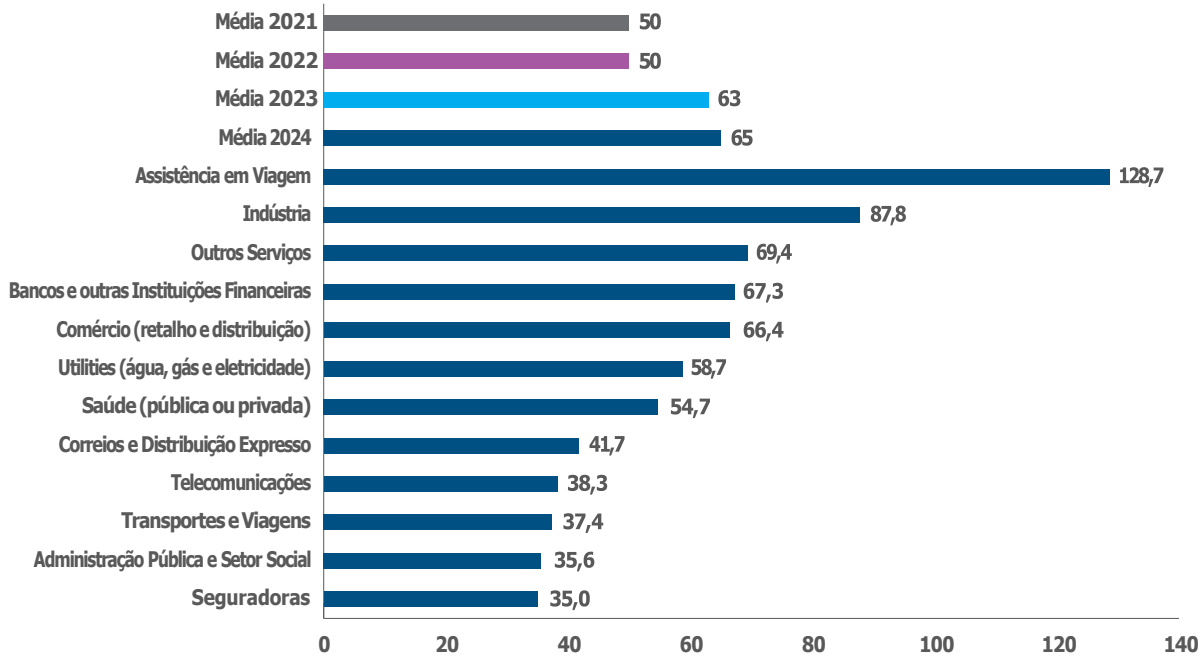


QUESTION: What is the annual number of training hours, including refresh, per Supervisor?

COMMENT: As was observed with the annual training of Agents, the annual training of Supervisors also saw an increase, in this case of 3.2% compared to the value in 2023, rising from 63 to 65 hours. The sectors with the highest volume of annual Supervisor training are Travel Assistance (128.7 hours) and Industry (87.8 hours). The sectors with the lowest volume are Public Administration and Social Sector (35.6 hours) and Insurance Companies (35 hours).

FIGURE 46

NUMBER OF ANNUAL TRAINING HOURS, PER SUPERVISOR (N=1550)

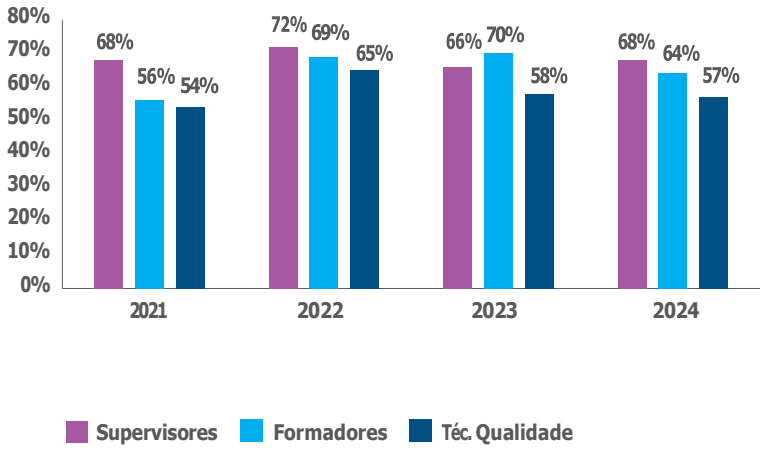


QUESTION: Are there specific programs / plans for training / certifying Supervisors, Trainers and Quality Technicians?

COMMENT: In global terms, there was a slight reduction in 2024 in the percentage of Operations/Service Lines with specific training/accreditation plans. In the case of Supervisors, the established value is 68%, higher than the 66% in 2023, but below the 72% in 2022. Regarding Trainers, we see the most significant decrease, from 70% to 64%. Finally, for Quality Technicians, the reduction was marginal, from 58% to 57%.

FIGURE 47

EXISTANCE OF SPECIFIC TRAINING / CERTIFYING PLANS / PROGRAMS (N= 1923)



QUESTION: What is the distribution by gender of Agents and Supervisors?

COMMENT: In both the gender distribution of Agents and Supervisors, the female gender is predominant, with slight increases noted in both cases (from 66% to 68% among Agents and from 61% to 62% among Supervisors). It is worth noting that the predominance of the female gender occurs among both Agents and Supervisors, proving that there is no gender discrimination in this industry, particularly regarding access to leadership roles.

FIGURE 48

DISTRIBUTION OF AGENTS PER GENDER (N=1923)

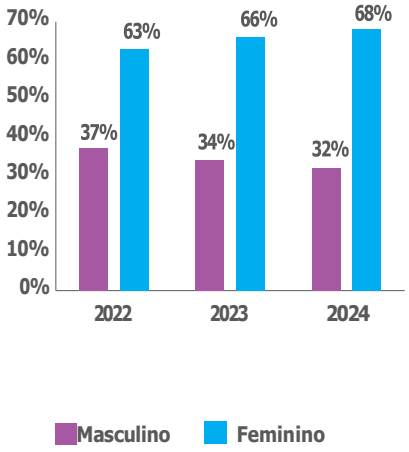
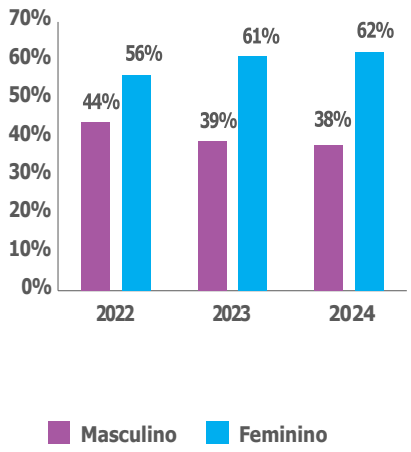


FIGURE 49

DISTRIBUTION OF SUPERVISORS PER GENDER (N=1923)



QUESTION: What is the number of Agents and Supervisors within the following age group?

COMMENT: An analysis of the age distribution of Agents shows that there was an increase from 15.1% to 17.3% in the Up to 25 years category, and a decrease in the other two categories (from 53.9% to 53.7% in the 25 to 40 years category and from 31% to 28.9% in the Over 40 years category). Regarding Supervisors, the percentage in the Up to 25 years category decreased from 7.7% to 4.2%, and the percentage in the 25 to 40 years category also decreased (from 60.7% to 60.3%). Among the Supervisors, only the Over 40 years category shows growth, from 31.6% to 35.5%.

FIGURE 50

AGE GROUP OF AGENTS (N=1732)

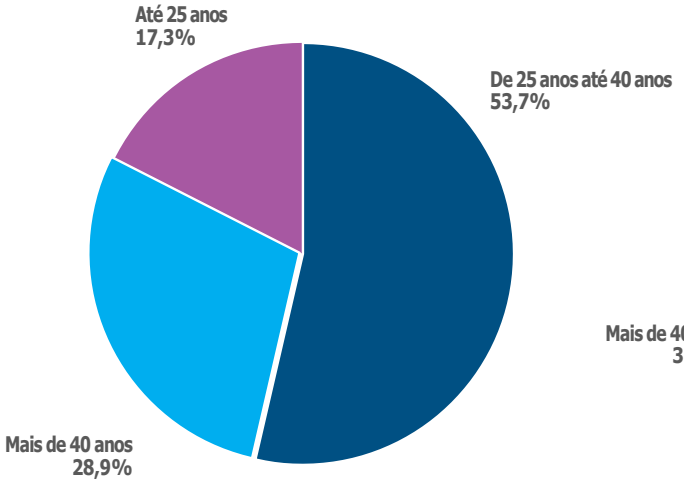
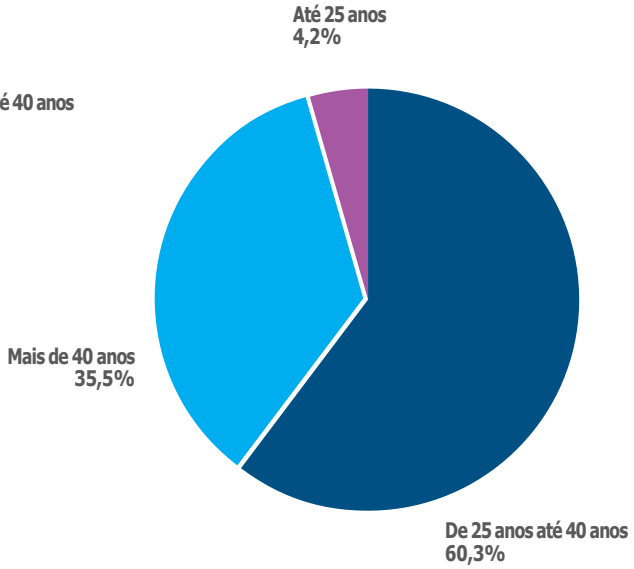


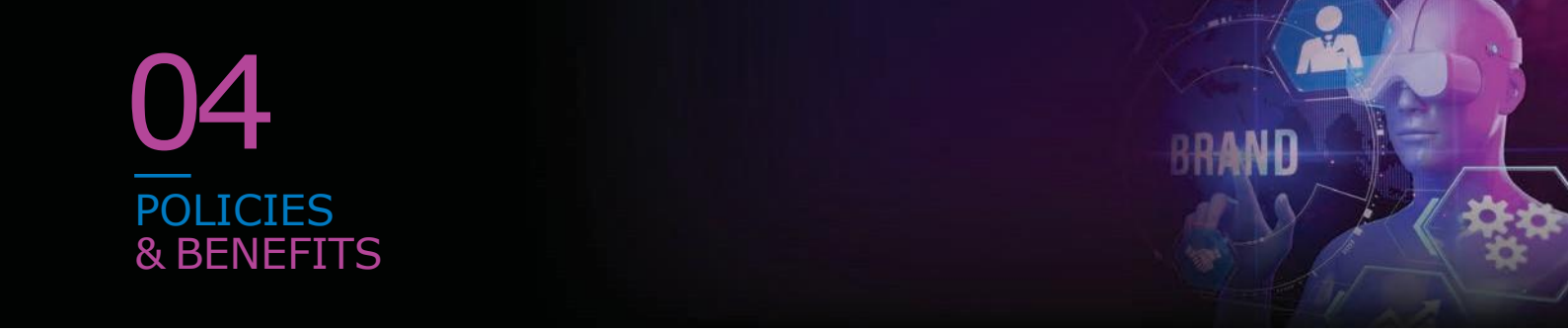
FIGURE 51

AGE GROUP OF SUPERVISORS? (N=1848)



04

POLICIES & BENEFITS

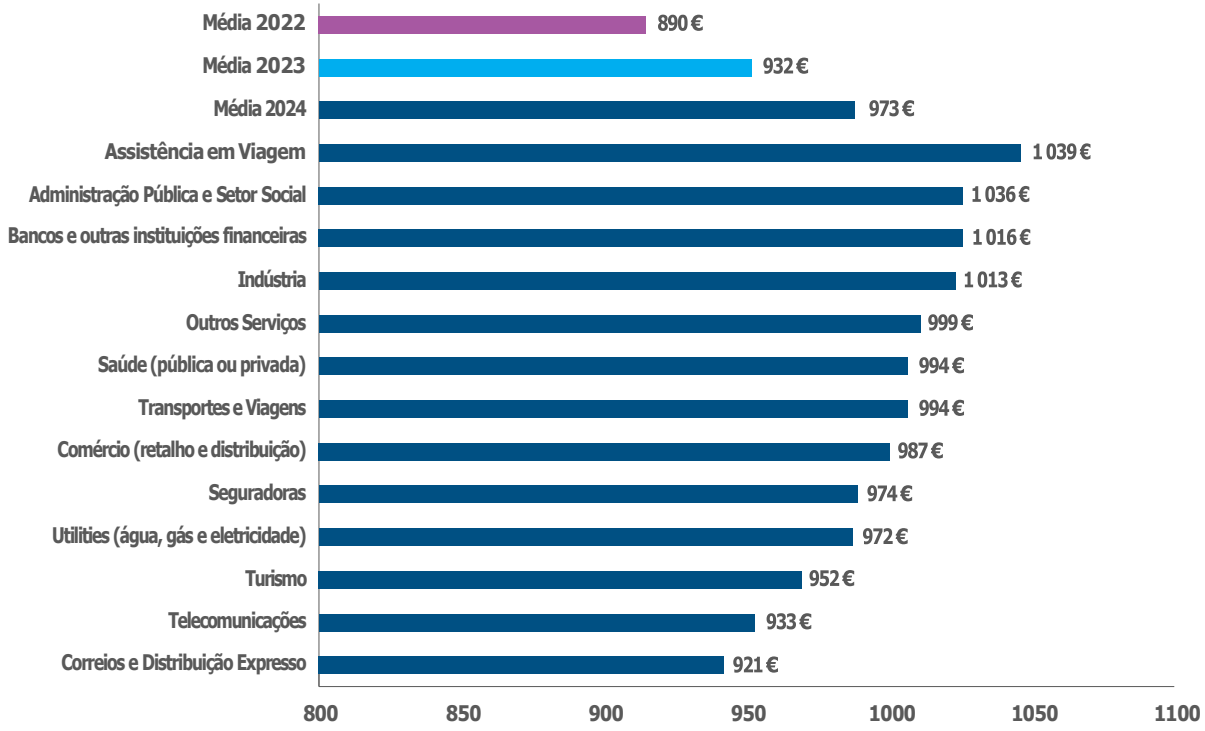


QUESTION: What is the average monthly salary of Agents (excluding food, holidays and Christmas allowances)?

COMMENT: There has been a 4.5% increase in the gross salaries of Agents, rising from €932 to €973. The sectors with the highest gross salaries are Public Administration and Social Sector (€1,036) and Travel Assistance (€1,039). The lowest average values are found in Post and Express Distribution (€921) and Telecommunications (€933). Respondents indicated 5.6% as the forecast for salary updates in 2025.

FIGURE 52

GROSS AVERAGE MONTHLY SALARY OF AGENTS (EUROS) (N=1803)

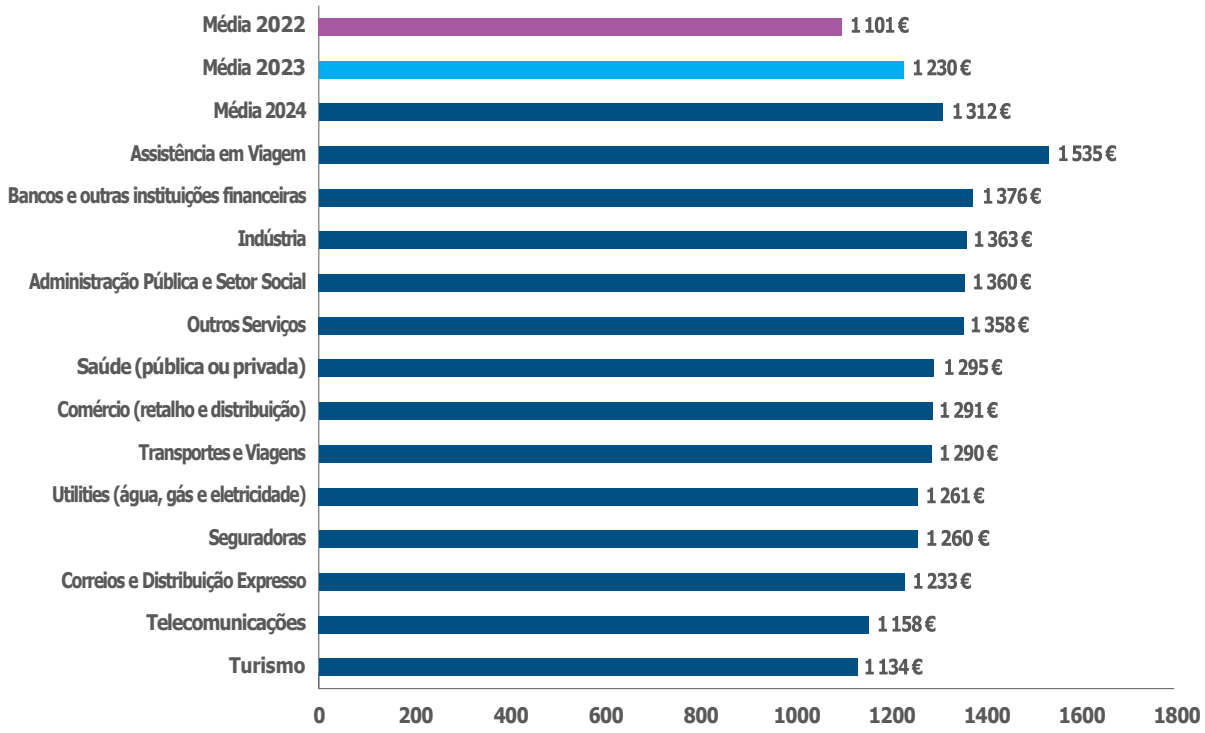


QUESTION: What is the average monthly salary of Supervisors (excluding food, holidays and Christmas allowances)?

COMMENT: There was an increase in the gross salaries of Supervisors of 6.7%, rising from €1,230 to €1,312. The sectors with the highest average salaries are Travel Assistance (€1,535) and Banks and other Credit Institutions (€1,376). The lowest average values are found in Tourism (€1,134) and Telecommunications (€1,158).

FIGURE 53

GROSS AVERAGE MONTHLY SALARY OF SUPERVISORS (EUROS) (N=1803)

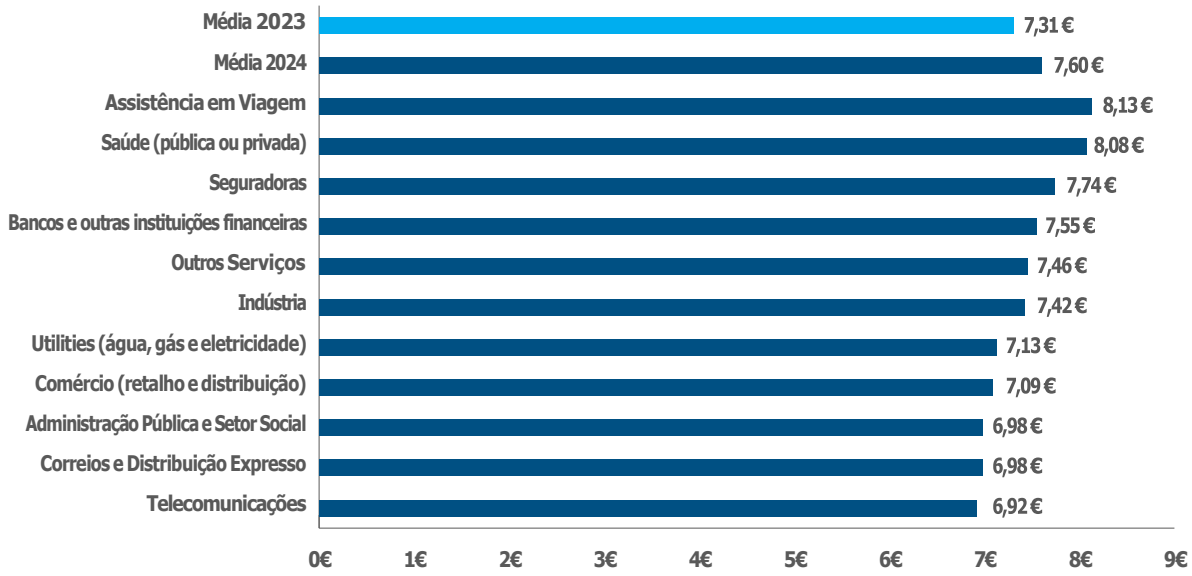


QUESTION: What is the average daily food allowance of a full time Employee?

COMMENT: This indicator that began to be part of the APCC Benchmarking Study of 2023 shows a progression of 4%, from €7.31 to €7.60. The highest average values were recorded in Travel Assistance (€8.13) and Health (€8.08). The lowest values are in Telecommunications (€6.92) and in Postal Services and Express Distribution as well as in Public Administration and the Social Sector, both at €6.98.

FIGURE 54

AVERAGE DAILY FOOD ALLOWANCE IN 2024 (N=1763)

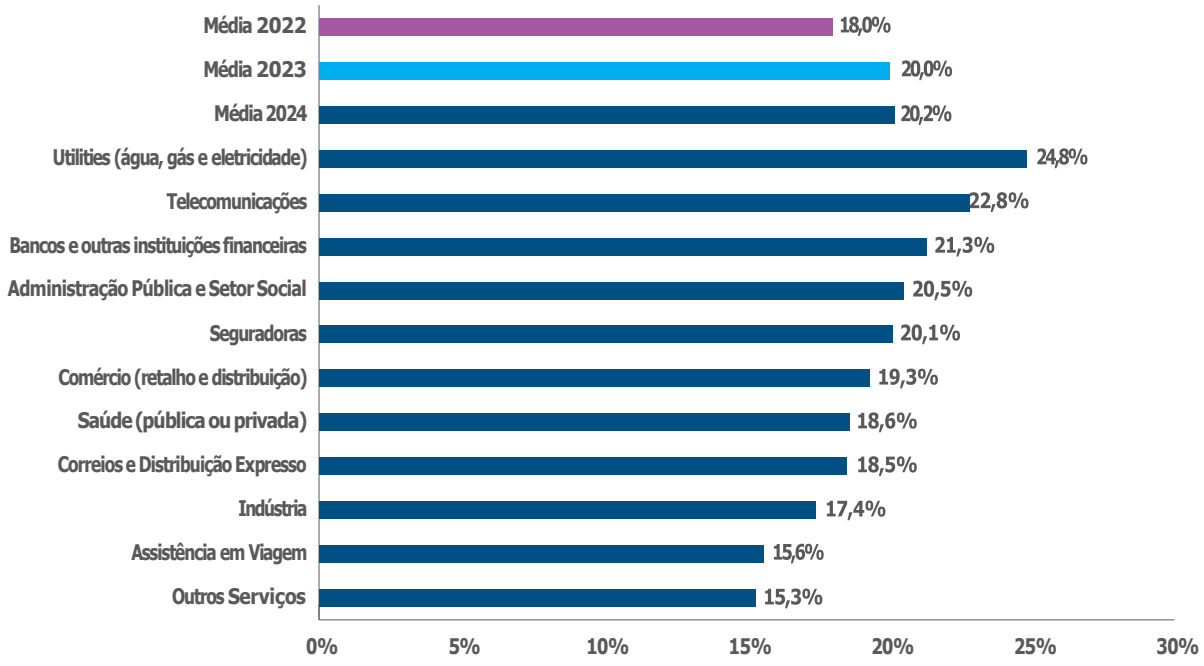


QUESTION: What is the ratio of other remunerations compared to the gross monthly salary, per Agent?

COMMENT: After two years of significant annual growth, this ratio shows a modest increase in 2024 (20.2% in 2024, compared to 20% in 2023). The highest ratios are found in Utilities (24.8%) and Telecommunications (22.8%). The lowest ratios are in Travel Assistance (15.6%) and Other Services (15.3%).

FIGURE 55

RATIO OF OTHER REMUNERATIONS COMPARED TO THE GROSS MONTHLY SALARY, PER AGENT (N=1737)

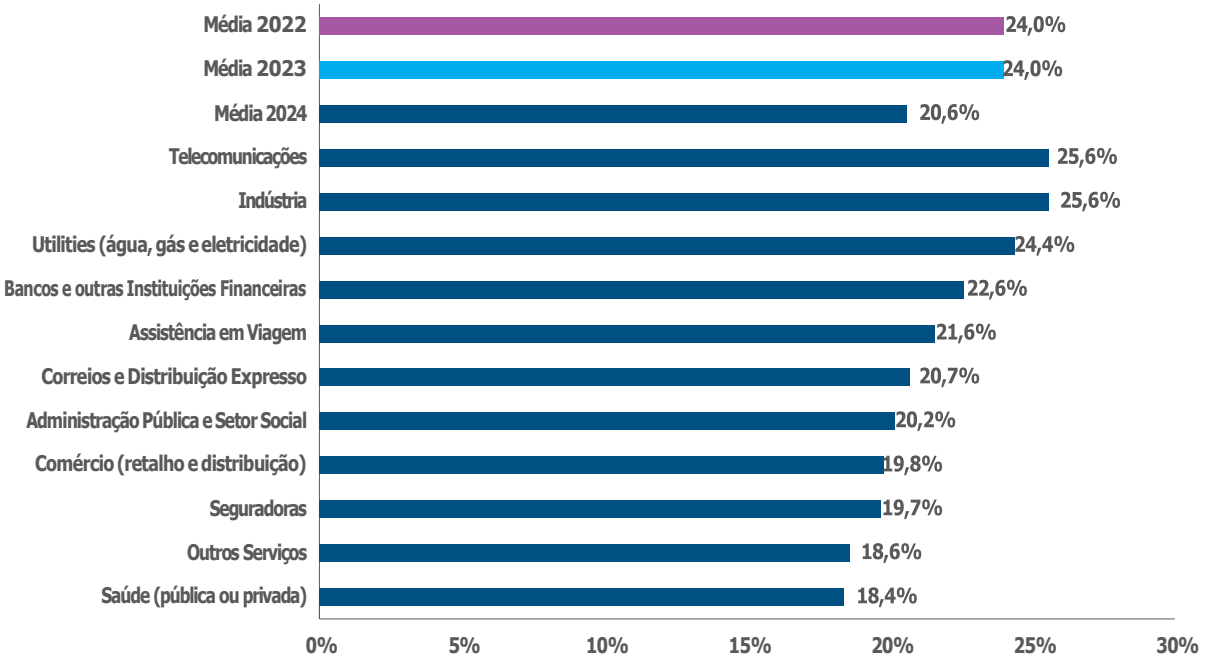


QUESTION: What is the ratio of other remunerations compared to the gross monthly salary, per Supervisor?

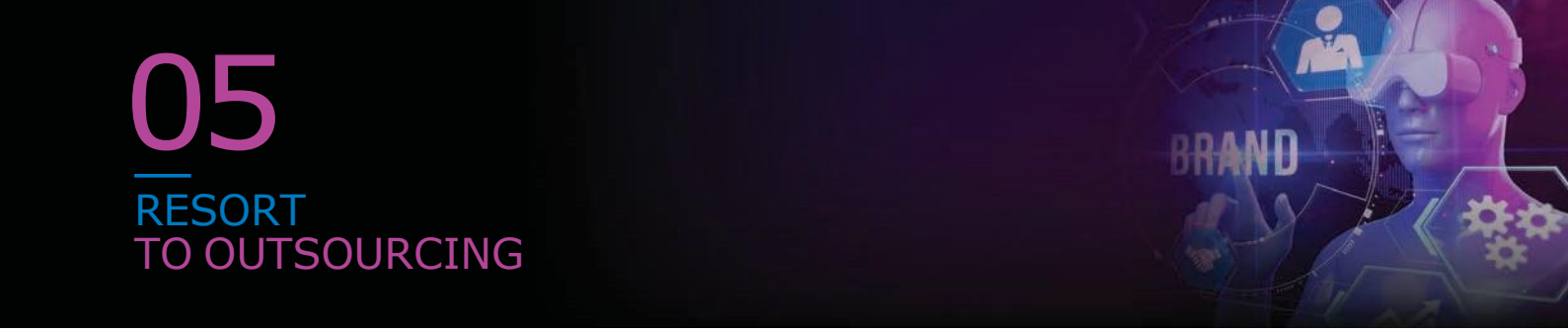
COMMENT: Contrary to the trend of stability that was evident in the results of 2022 and 2023, in 2024 there is a significant decrease in the average value of this variable component of remuneration, from 24% to 20.6%. This average value is very close to the corresponding amount for Agents, unlike what occurred in 2023, for example. The most significant ratios are found in Telecommunications and Industry, both at 25.6%. The lowest ratios are in Health (18.4%) and Other Services (18.6%).

FIGURE 56

RATIO OF OTHER REMUNERATIONS COMPARED TO THE GROSS MONTHLY SALARY, PER SUPERVISOR (N=1719)



05
RESORT TO OUTSOURCING

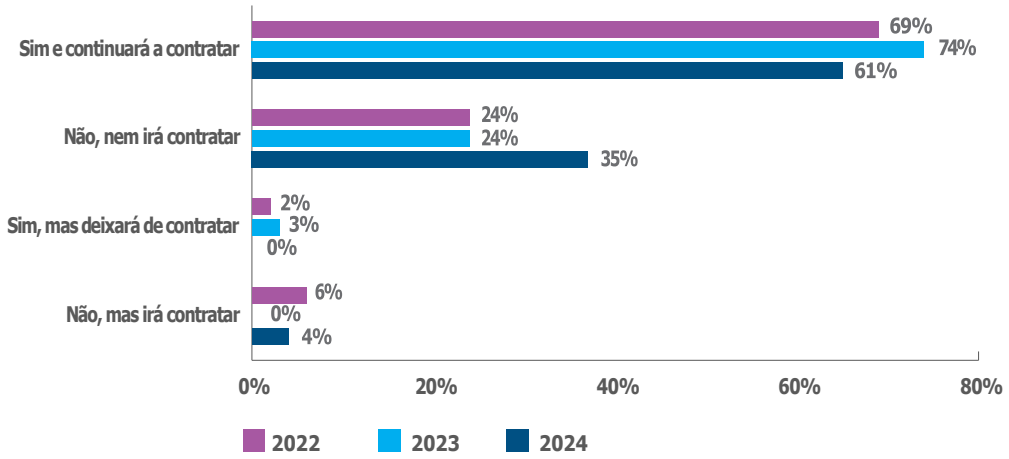


QUESTION: Does your Company hire Outsourcing services for Contact Center functions?

COMMENT: The answer "Yes and will continue to hire" shows the lowest value recorded in previous editions of this Study (61%, when in 2023 it was 74%) and, on the other hand, the answer "No, will not hire" assumes the highest value ever (35%, when in 2023 it was 24%). It is noteworthy that there were no responses "Yes, but will stop hiring". Finally, the response "No, but will hire", which in 2023 was 0%, reached 4%.

FIGURE 57

HIRING OUTSOURCING SERVICES (N=890)

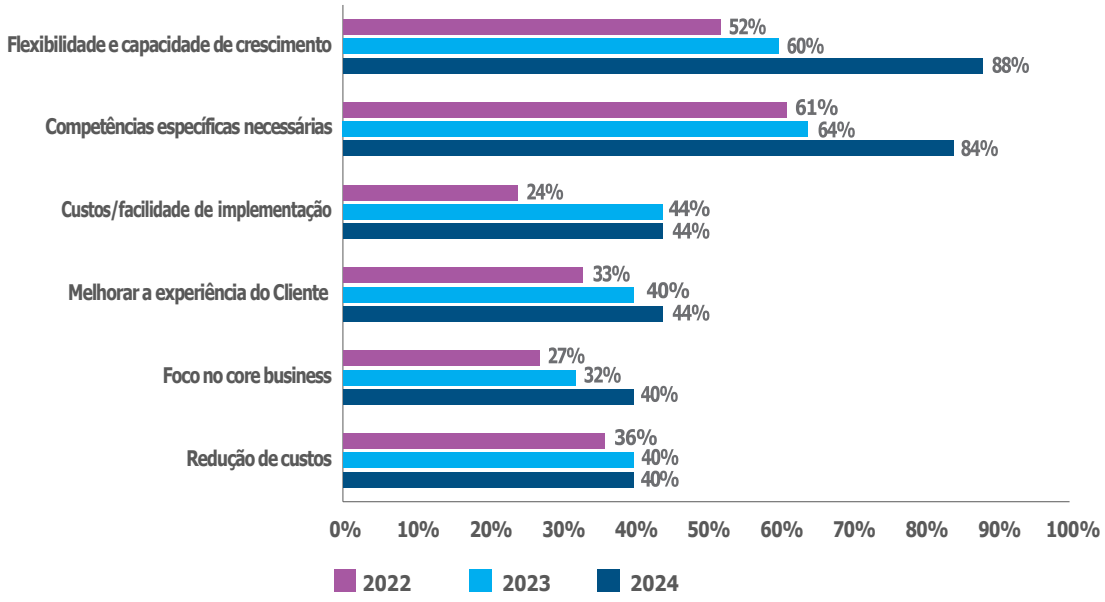


QUESTION: What are the reasons to hire Outsourcing services?

COMMENT: Being a multiple-choice question, it was found that references to all the reasons listed have increased. The most frequent is "Flexibility and capacity for growth," with 88%, followed by the "Necessary specific skills", with 84%. The least mentioned reasons are "Focus on core business" and "Cost reduction," yet both still at 40%.

FIGURE 58

REASONS TO HIRE OUTSOURCING SERVICES (N=471)

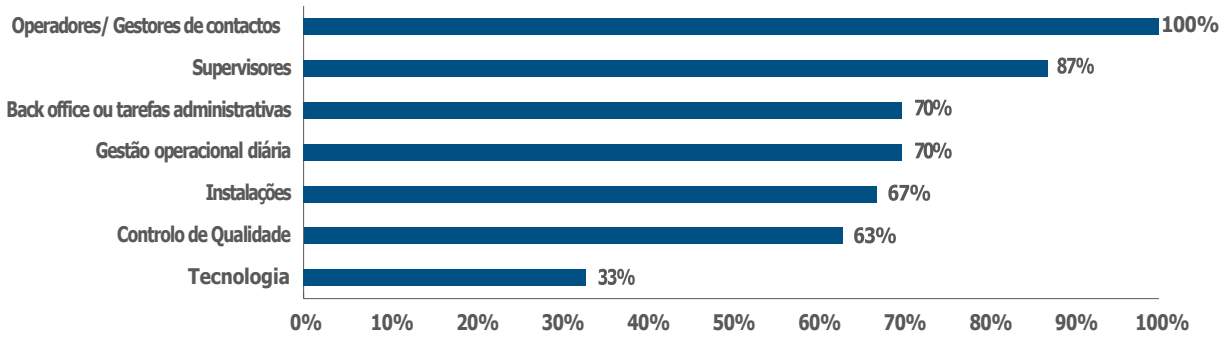


QUESTION: What are the services hired to Outsourcers?

COMMENT: As in previous editions of this Study, the most hired services are Agents (100%) and Supervisors (87%). The least hired services are Technology (33%) and Quality Control (63%).

FIGURE 59

SERVICES HIRED TO OUTSOURCERS (N=456)

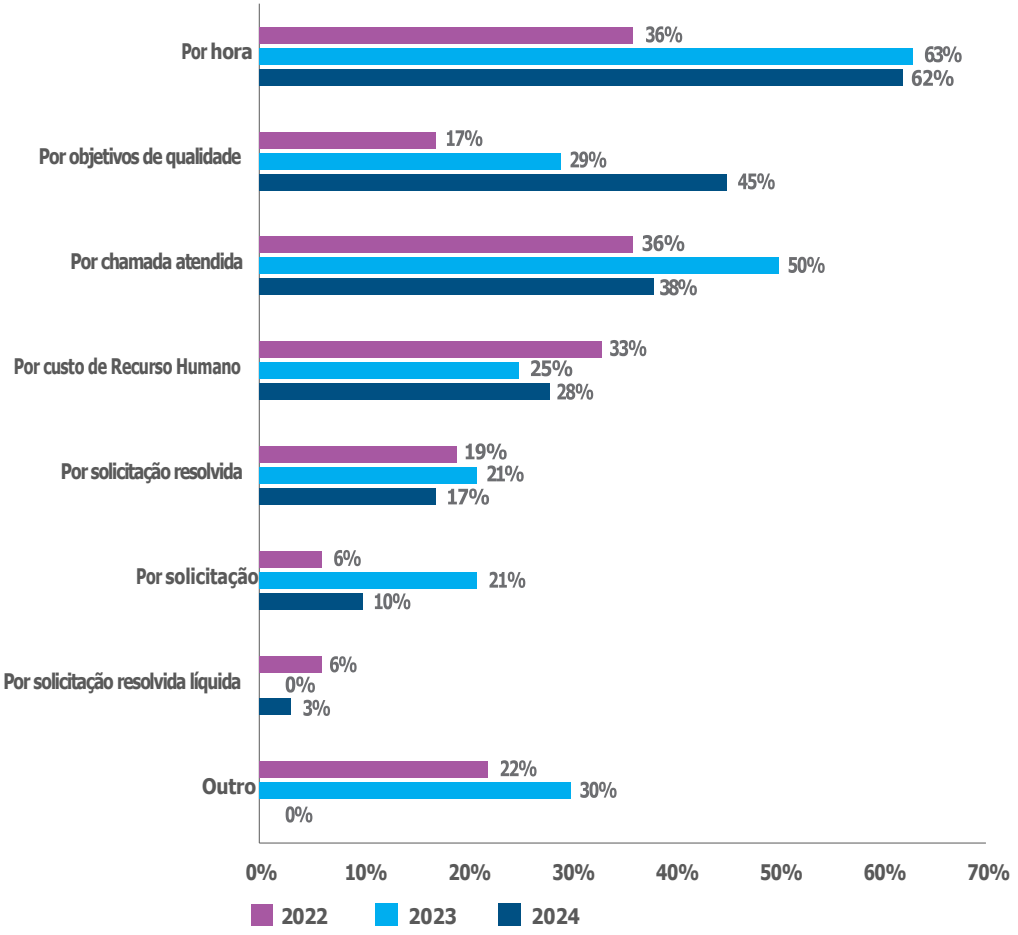


QUESTION: What is the Outsourcer compensation model?

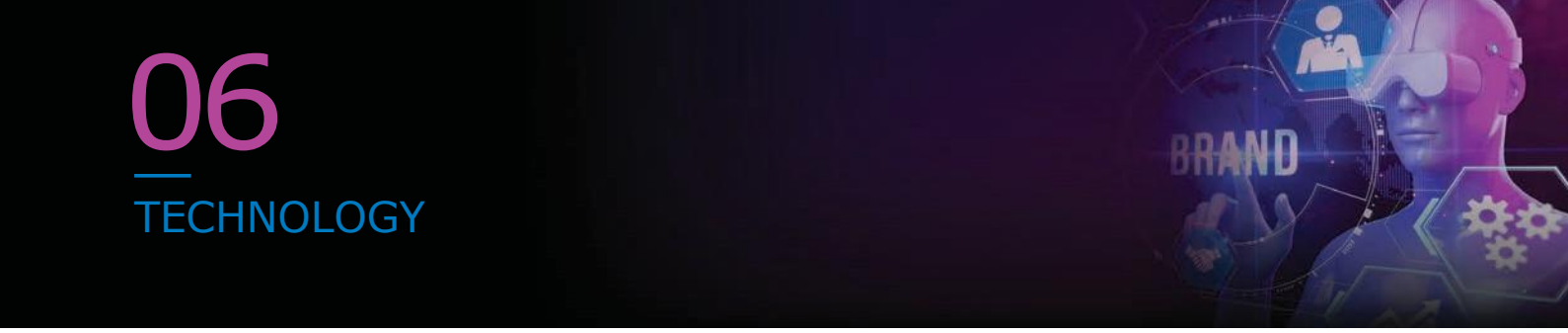
COMMENT: The most used compensation model for Outsourcers remains hourly, with a response frequency of 62% (down from 63% in 2023). The most significant growth occurs in the performance-based model, which rises from 29% to 45%, while the largest decline goes to the model based on answered calls, which drops from 50% to 38%. The model based on solved net requests continues to be the least mentioned, now at 3%, compared to 0% in 2023.

FIGURE 60

OUTSOURCER COMPENSATION MODEL (N=455)



06
TECHNOLOGY

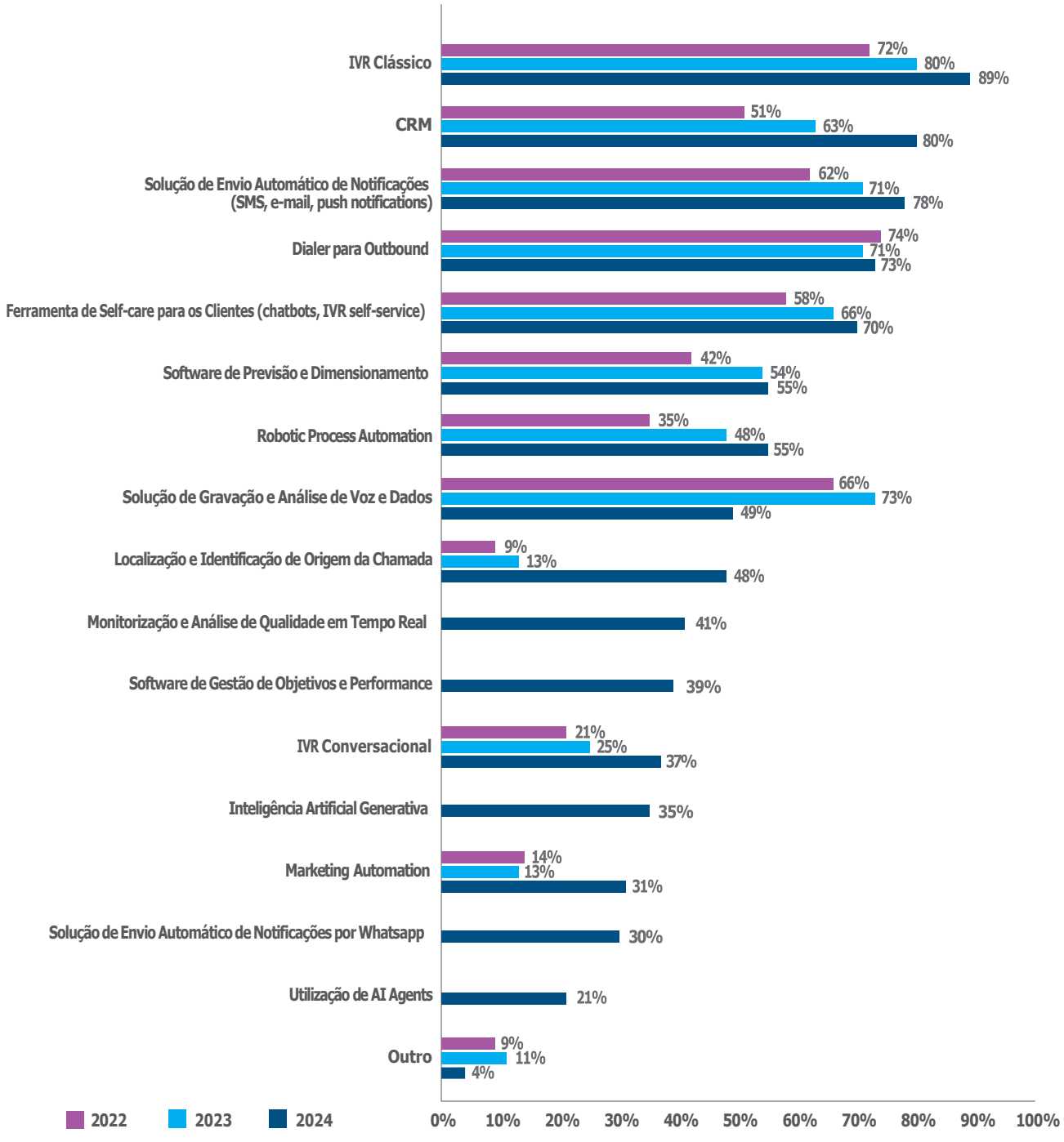


QUESTION: What are the main technological solutions used?

COMMENT: The need to update the Technology chapter has led to the introduction of new categories, which complicates the analysis of evolutions. Notably, there was a significant growth in Classic IVR (from 80% to 89%) and CRM (from 63% to 80%), the most used solutions. Among the new solutions included, Real-Time Quality Monitoring and Analysis (41%) and Results and Performance Management Software (39%) stand out. Special attention to the 35% for Generative Artificial Intelligence and 21% for the Use of AI Agents.

FIGURE 61

MAIN TECHNOLOGICAL SOLUTIONS USED (N=1945)

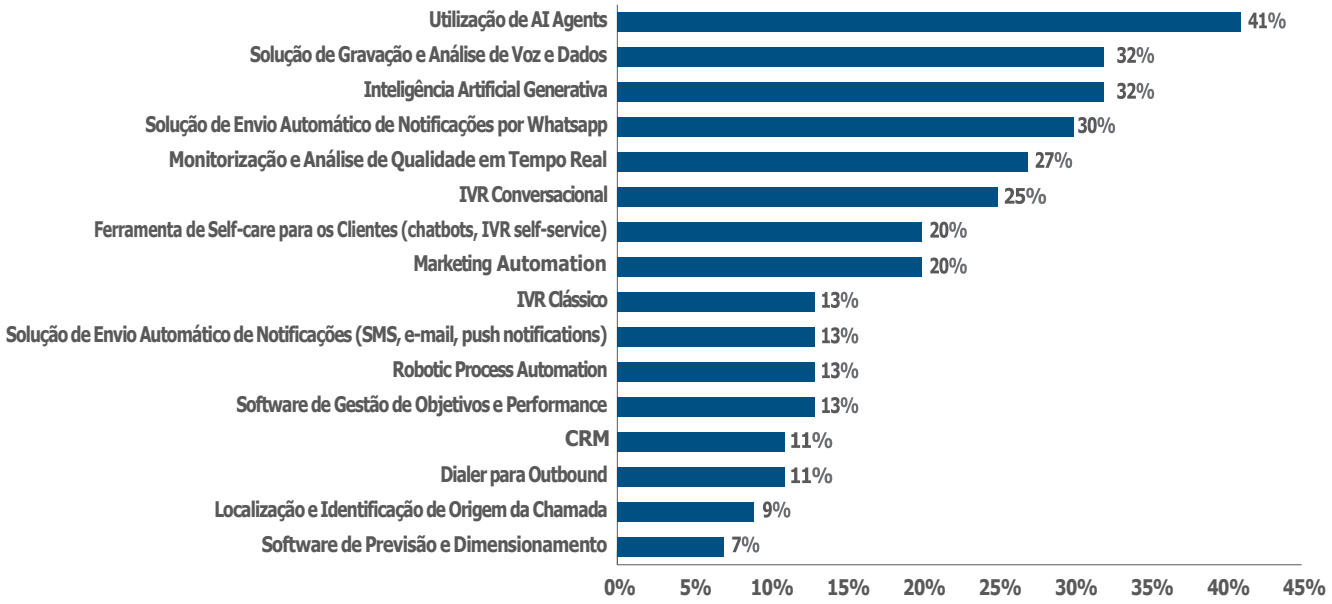


QUESTION: Which technological solutions may be implemented in the future?

COMMENT: The technological solutions that the Industry most intends to implement in the future are the Use of AI Agents (41%), Voice and Data Recording and Analysis Solution, and Generative Artificial Intelligence (both with 32% of the responses). The least mentioned solutions are Forecasting and Dimension Software (7%) and Call Origin Location and Identification (9%).

FIGURE 62

TECHNOLOGICAL SOLUTIONS THAT MAY BE IMPLEMENTED IN THE FUTURE (N=1560)

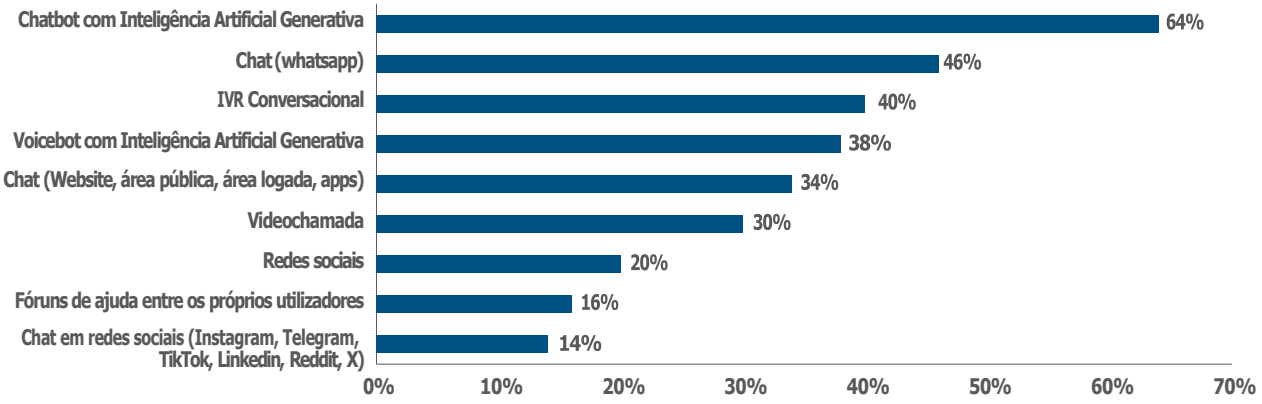


QUESTION: What new channels do you consider using in the future?

COMMENT: The Generative Artificial Intelligence Chatbot channel was indicated in 64% of the responses as being considered for future use. The second most mentioned channel is Chat (WhatsApp), with 46% of the responses. The least indicated channels are Help Forums among Users (16%) and Chat on Social Media (14%).

FIGURE 63

NEW CHANNELS TO BE USED IN THE FUTURE (N=1086)

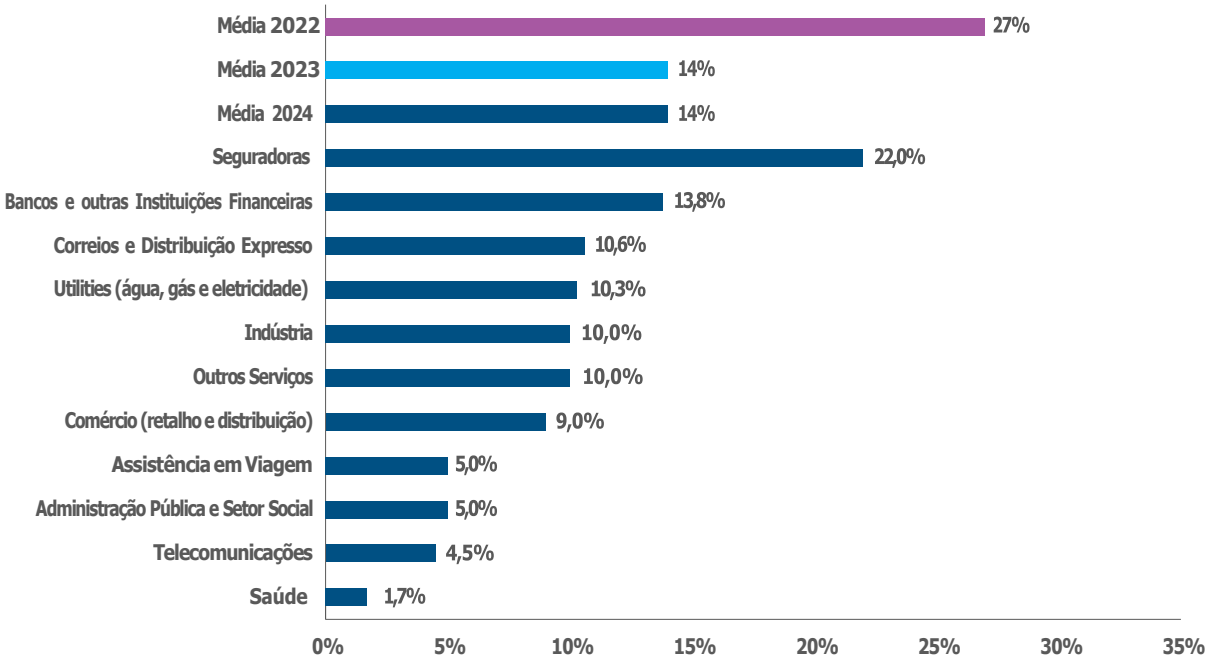


QUESTION: What is the percentage of contacts handled by Bots (voice and text)?

COMMENT: The overall percentage of services handled by Bots has stabilized at 14%, a figure that was already observed in 2023, after a decline since 2021. The sectors with the highest percentages are Insurance Companies (22%, up from 10% in 2023) and Banks and other Financial Institutions (decreasing from 17% in 2023 to 13.8% in 2024). Clearly below the intersectoral average are Health (1.7%) and Telecommunications (4.5%).

FIGURE 64

PERCENTAGE OF CONTACTS HANDLED BY BOTS (N=469)

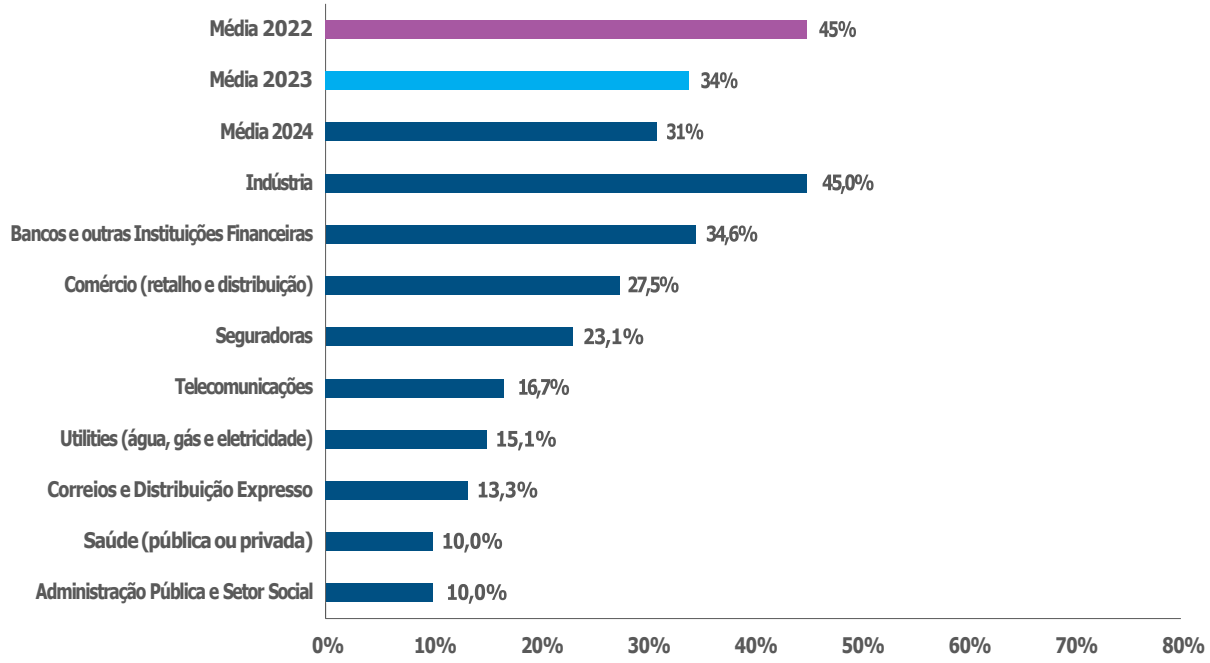


QUESTION: What is the percentage of requests solved by Bots?

COMMENT: When respondents who reported being served by Bots were asked, it turns out that 31% is the percentage of requests solved by Bots. This figure is lower compared to the values from 2023 (34%) and 2022 (45%). The sectors with the highest records are Industry (45%) and Banks and other Financial Institutions (34.6%), while the Public Administration and Social Sector show the lowest percentage (10%).

FIGURE 65

PERCENTAGE OF REQUESTS SOLVED BY BOTS (N=262)

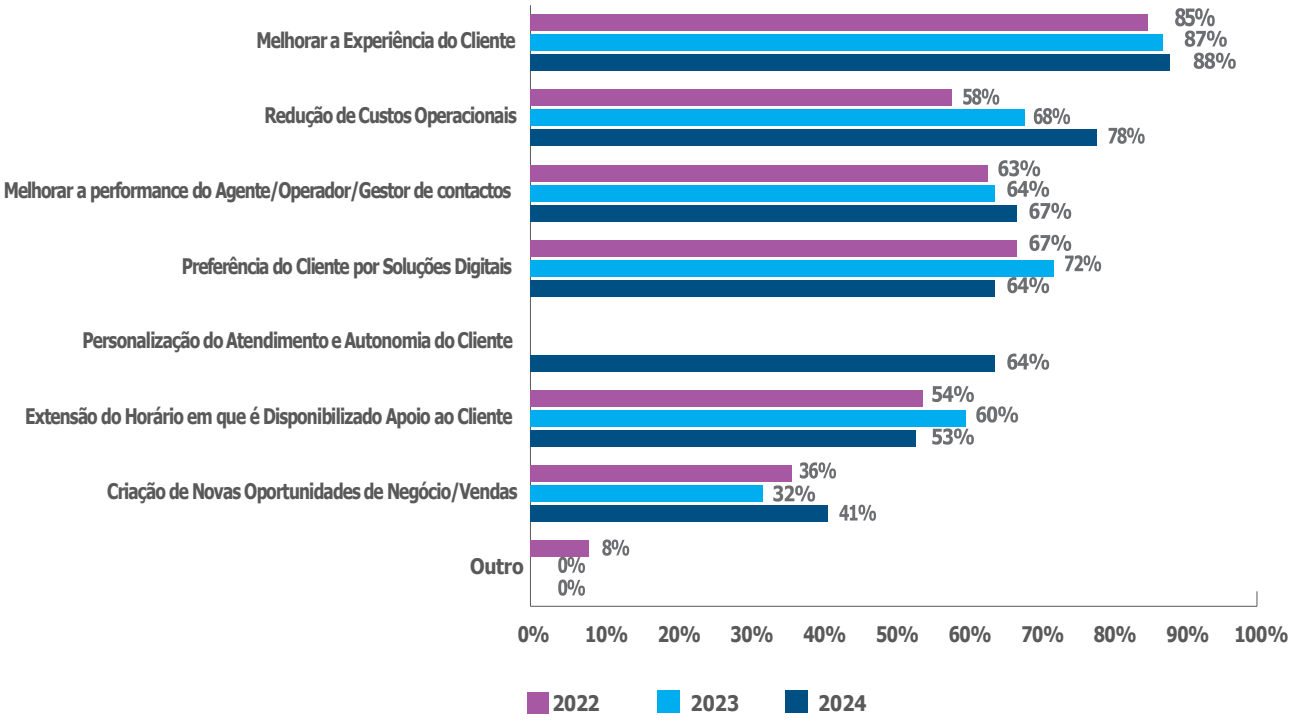


QUESTION: What are the main reasons for offering self-care tools / channels?

COMMENT: The most cited reason for providing self-care tools/channels continues to be "Improving the Customer Experience", now with 88% of references, compared to 87% in 2023, followed by "Reducing Operational Costs", indicated by 78% of respondents, an increase of 10% from the previous year. The least referred reason was "Improving Business/Sales Opportunities", as was observed in 2022, now with 41% of responses, reflecting growth compared to 32% in 2023. For the first time, the option of "Personalization of Service and Customer Autonomy" was introduced, which recorded 64% of references.

FIGURE 66

REASONS FOR OFFERING SELF-CARE TOOLS / CHANNELS (N=1626)

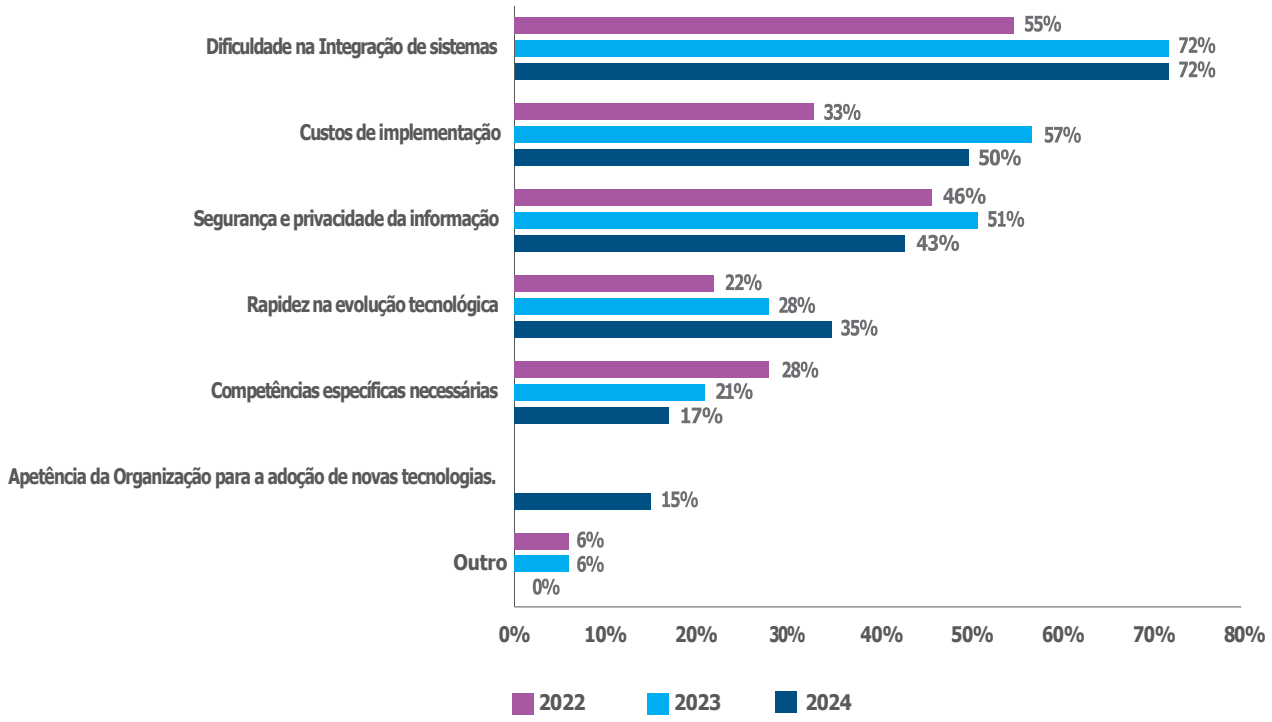


QUESTION: What are the major challenges to have efficient Self-care solutions?

COMMENT: The "Difficulty in integrating systems" remains the biggest challenge to establishing efficient Self-care service solutions, retaining even the value of 72% recorded in 2023. Although both are declining, the "Implementation Costs" (from 57% in 2023 to 50% in 2024) and the "Security and privacy of information" (from 51% in 2023 to 43% in 2024) are the next most indicated challenges. The least mentioned challenges were the "Specific skills required" (from 21% in 2023 to 17% in 2024) and the "Organization's willingness to adopt new technologies", an option introduced for the first time this year and chosen by 15% of respondents.

FIGURE 67

CHALLENGES TO HAVE EFFICIENT SELF-CARE SOLUTIONS (N=1699)

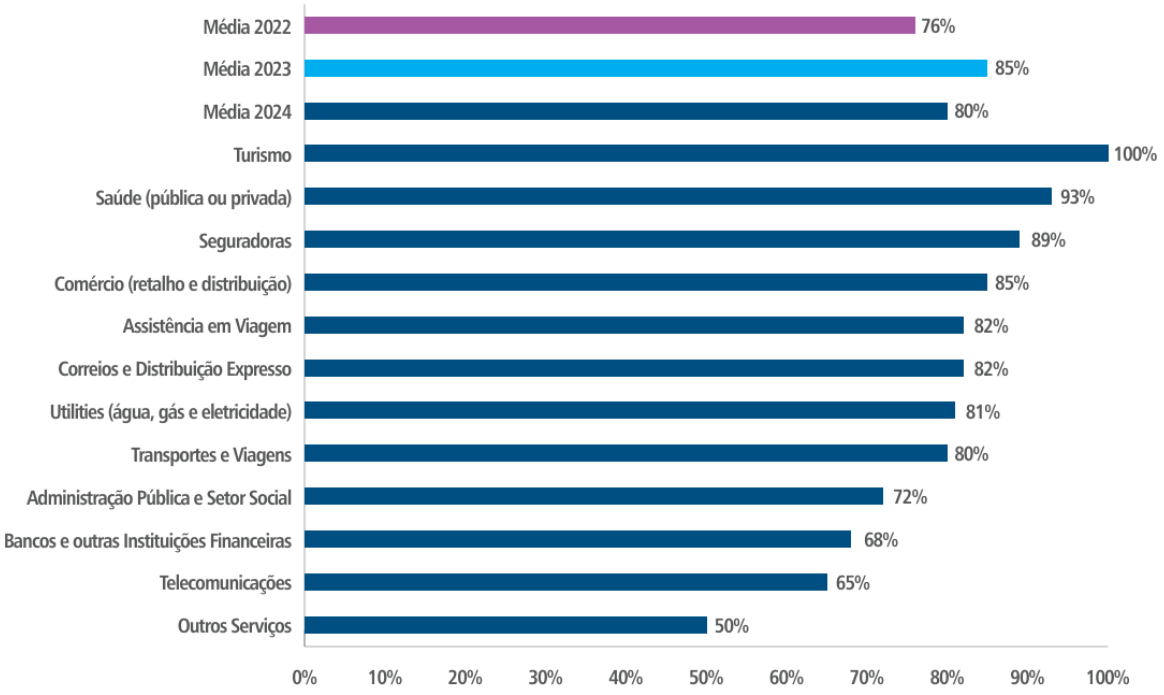


QUESTION: What is the percentage of use of a Cloud-based technological model, per sector?

COMMENT: The use of Cloud shows a slight decrease, from 85% in 2023 to 80% in 2024. The only sector with 100% utilization of a technology model based on Cloud is Tourism. Health, with 93% (up from 91% in 2023), Insurance companies, with 89% (up from 81% in 2023), and Commerce, with 85% (which was 70% in 2023) are the following sectors. The lowest utilization occurs in Other Services (50% in 2024, down from 76% in 2023), Telecommunications (65% in 2024, up from 60% in 2023), and Banks and other Financial Institutions (68% in 2024, up from 50% in 2023).

FIGURE 68

USE OF A CLOUD-BASED TECHNOLOGICAL MODEL (N=1013)

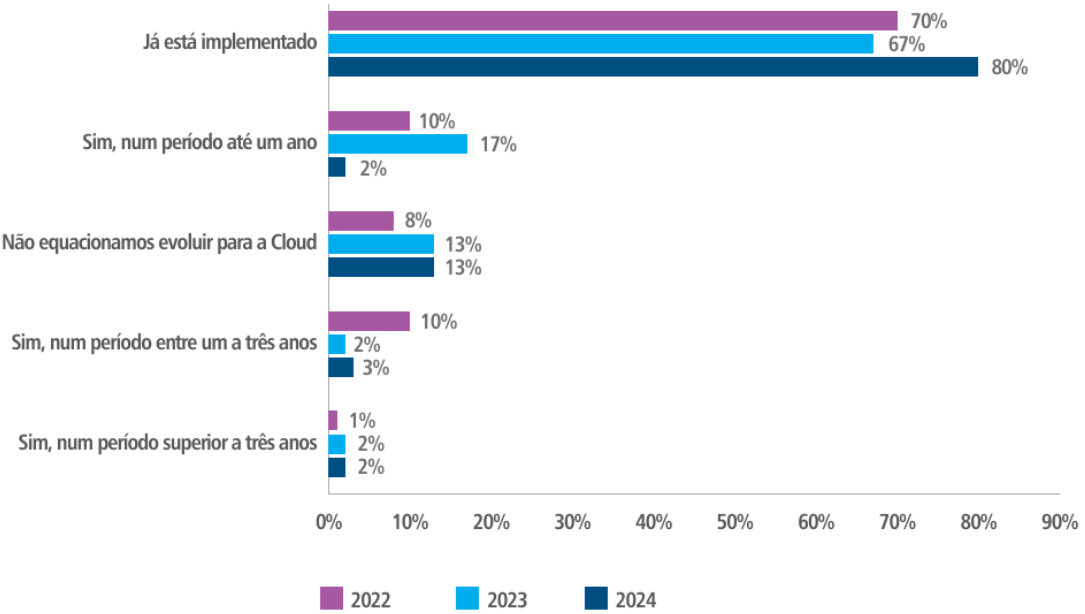


QUESTION: Do you intend to evolve your Contact Center to the Cloud?

COMMENT: The prevalence of Cloud usage increased to 80% in 2024, up from 67% in 2023. Among the remaining 20% who do not use a Cloud-based technology model, two-thirds do not consider evolving to the Cloud (13% of the total respondents to this question). The percentage of operations intending to transition to the Cloud within a year saw a significant reduction (from 17% to 2%), easily explained by the increase in usage.

FIGURE 69

INTENTION TO EVOLVE THE CONTACT CENTER TO THE CLOUD (N=1088)

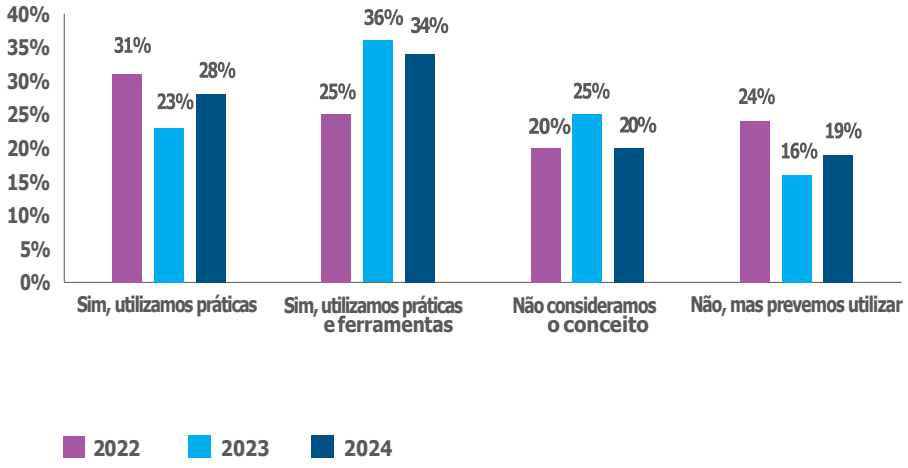


QUESTION: Does your Organization use Gamification tools?

COMMENT: Analysing the evolution of this indicator from 2023 to 2024, there is a notable increase in the percentage of Operations that use practices (from 23% to 28%) and a decrease in the percentage that use practices and tools (from 36% to 34%). 20% of respondents stated that they do not consider the concept, while 19% do not use it yet, but anticipate using it in the future.

FIGURE 70

USE OF GAMIFICATION PRACTICES AND TOOLS (N =1926)

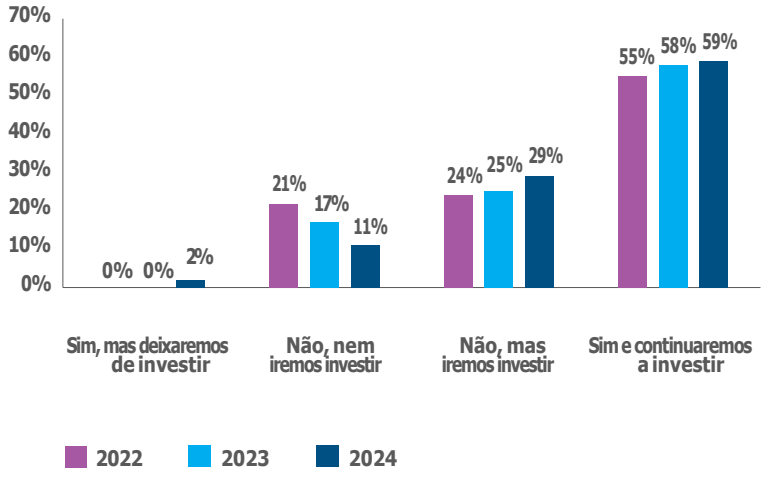


QUESTION: Do you currently invest in Robotic Process Automation? Do you plan to invest in the future?

COMMENT: There is a marginal increase in the Operations that invest and will continue to invest in RPA (from 58% to 59%) and a more significant increase in those that do not invest yet but intend to invest (from 25% to 29%). The percentage for Operations that neither invest nor intend to invest in RPA has dropped to its lowest ever (11%, compared to 17% in 2023). It is worth noting that only 2% stated that they have invested but will stop investing.

FIGURE 71

INVESTMENT IN ROBOTIC PROCESS AUTOMATION (N = 1864)

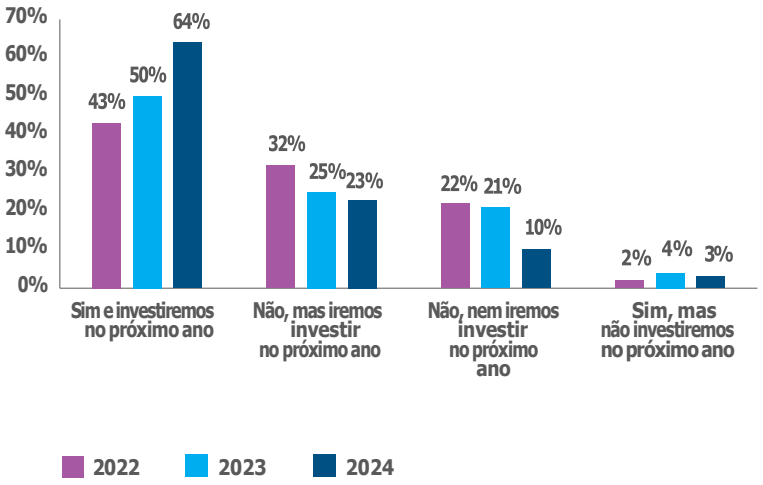


QUESTION: Do you currently invest in AI based solutions? Do you plan to invest in the future?

COMMENT**:** It is remarkable the very significant increase in Operations that invest and plan to continue investing in AI-based solutions (from 50% in 2023 to 64% in 2024). We recorded a reduction in the percentage of those who have not yet invested but intend to invest in 2025 (from 25% to 23%), as well as those who do not invest and will not invest in 2025 (from 21% to 10%). Although not very significant, 3% stated that they have invested but will stop investing, which is consistent with previous years.

FIGURE 72

INVESTMENT IN AI BASED SOLUTIONS (N = 1823)

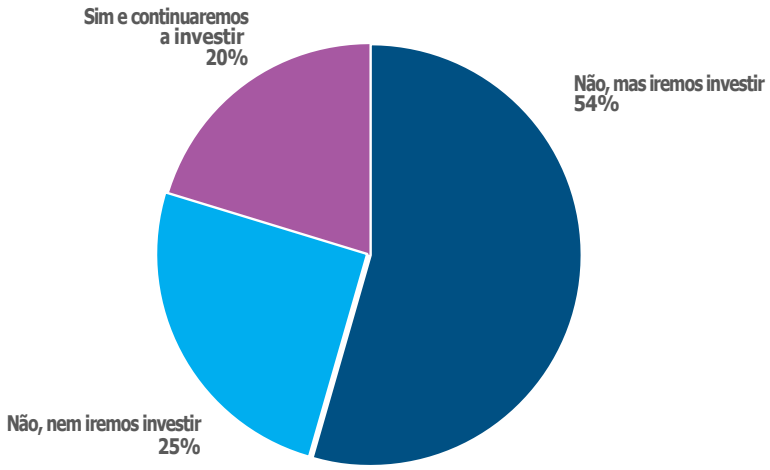


QUESTION: Your Organization is using or plans to use, AI Agents?

COMMENT: A question raised for the first time in the APCC Benchmarking Study shows that 20% of Operations are already investing and intend to continue to invest in AI Agents. Particularly significant is the percentage of those who are not yet investing but plan to invest in the future (54%). Only 25% stated that they are not investing and do not intend to invest.

FIGURE 73

USING OR PLANNING TO USE AI AGENTS? (N = 1771)



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

COMMENT: As in 2023, we are once again seeing an increase in the number of Operations that invest and will continue to invest in Speech to text solutions (from 34% in 2023 to 37.3% in 2024). Respondents who do not invest but intend to invest in 2025 also increased from 39.6% to 42.4%. These increases occur in contrast to the reduction of those who neither invest nor intend to invest (from 26.4% to 20.3%).

FIGURE 74

SPEECH TO TEXT SOLUTIONS (2023)
(N=1250)

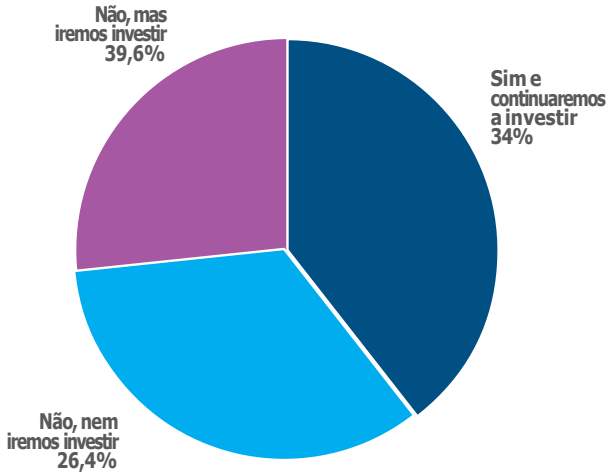
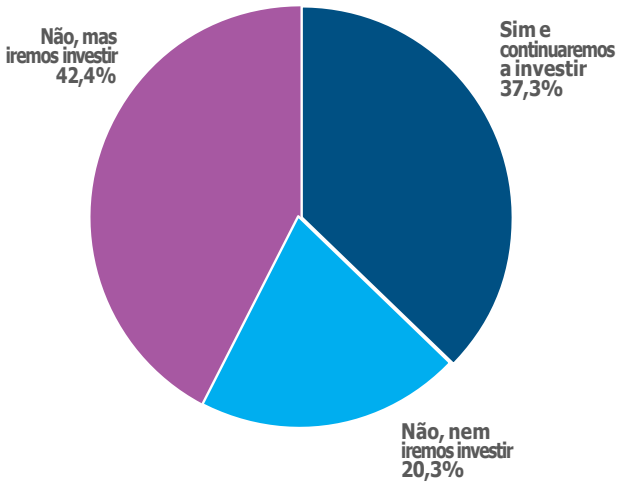


FIGURE 75

SPEECH TO TEXT SOLUTIONS (2024)
(N=1817)

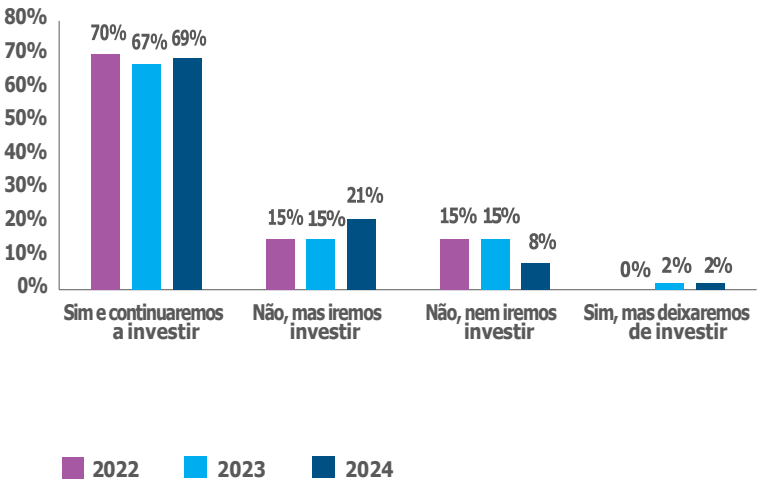


QUESTION: Do you have an Omnichannel solution? Do you plan to invest next year?

COMMENT: The percentage of responses indicating that they invest and intend to continue investing in Omnichannel solutions increased compared to 2023 (from 67% to 69%), although it remains slightly below the figure for 2022 (70%). It should also be noted the increase from 15% to 21% of those who do not invest yet but intend to invest in the future. In contrast to these two increases, the percentage of those who neither invest nor intend to invest has decreased from 15% to 8%, while the proportion of those who have invested but intend to stop investing remains the same (2%).

FIGURE 76

HAVING AN OMNICHANNEL SOLUTION? (N=1872)



QUESTION: What are the Customer Satisfaction metrics that you use?

COMMENT: NPS - Net Promoter Score continues to be the most used evaluation metric, even rising, although marginally, from 2023 to 2024 (from 45% to 46%). The CES - Customer Effort Score metric also shows growth from 2023 to 2024 (from 11% to 14%). These growth trends inevitably correspond to a reduction in the use of the CSAT - Customer Satisfaction Score metric, from 40% to 38%.

FIGURE 77

CUSTOMER SATISFACTION METRICS (2023) (N=1181)

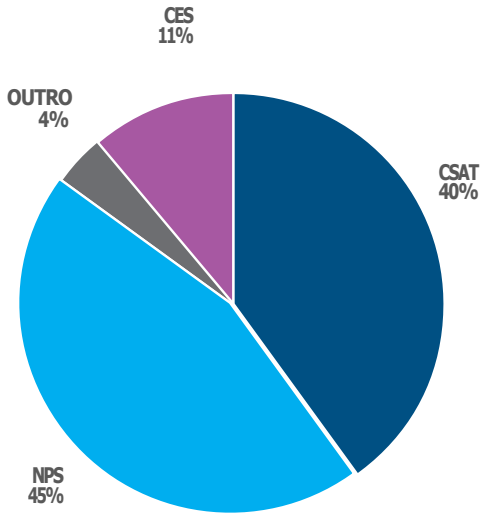
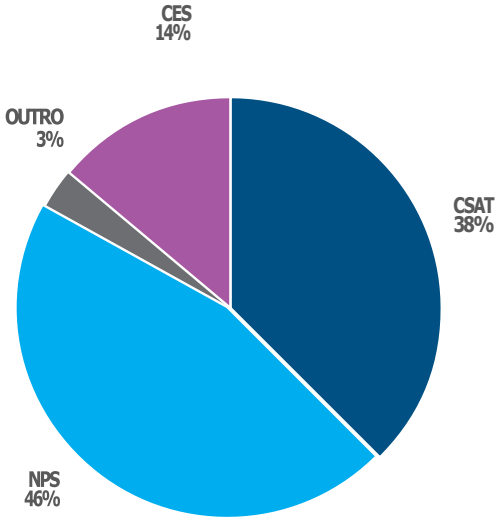


FIGURE 78

CUSTOMER SATISFACTION METRICS (2024) (N=1732)



QUESTION: If you conduct Customer Satisfaction surveys, what was the average results in 2024?

COMMENT: The percentage of Contact Centers that conduct customer satisfaction surveys increased from 56% in 2023 to 63% in 2024, even surpassing the 62% recorded in 2022. The average rating obtained decreased from 83% in 2023 to 81% in 2024, however it remains above the values of previous years. The sectors where higher average ratings were recorded were Health (85%), Public Administration and Social Sector (85%), and Transport and Travel (84%). The lowest average ratings occurred in Industry (66%) and Travel Assistance (71%).).

FIGURE 79

CUSTOMER SATISFACTION SURVEYS (N=1236)

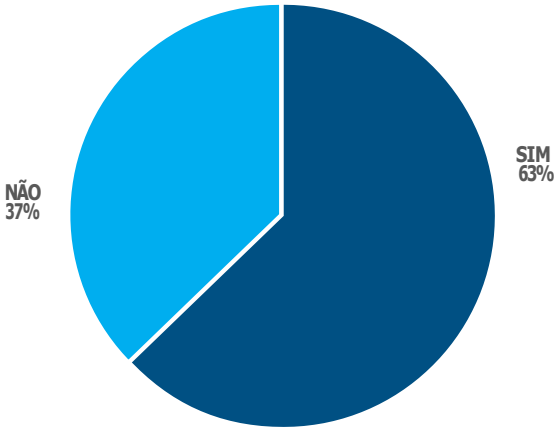
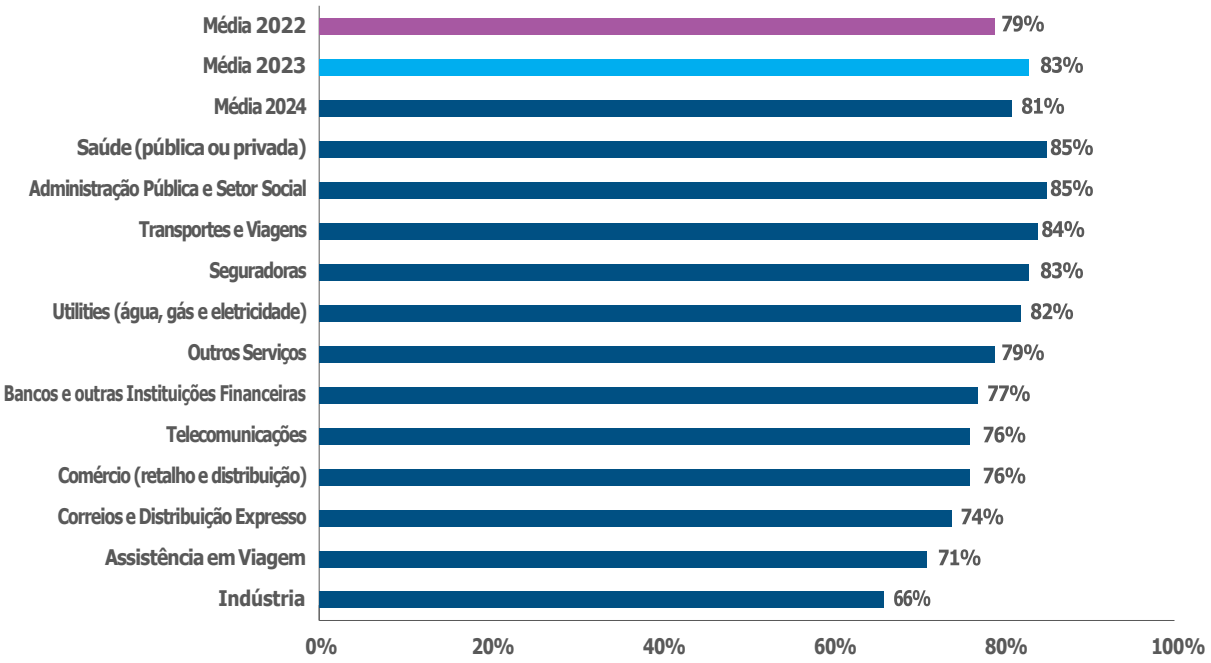


FIGURE 80

CUSTOMER SATISFACTION SURVEYS RESULTS (N=1236)

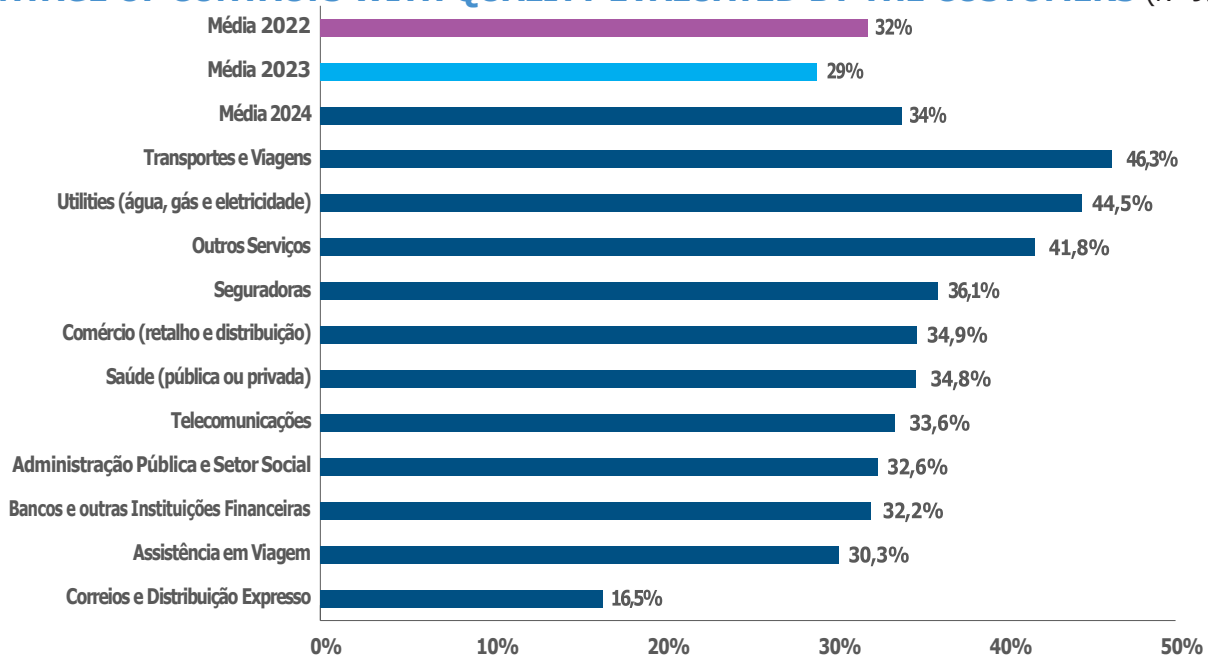


QUESTION: What was the percentage of contacts with quality evaluated by the Customer in 2024 (through satisfaction surveys)?

COMMENT: After the decrease in this indicator, which occurred in 2023, we registered a significant increase in 2024, from 29% to 34%. The sectors with the highest percentage of calls with surveys are Transportation and Travel (46.3%) and Utilities (44.5%). The lowest values are found in Postal Services and Express Distribution (16.5%) and Travel Assistance (30.3%).

FIGURE 81

PERCENTAGE OF CONTACTS WITH QUALITY EVALUATED BY THE CUSTOMERS (N=994)

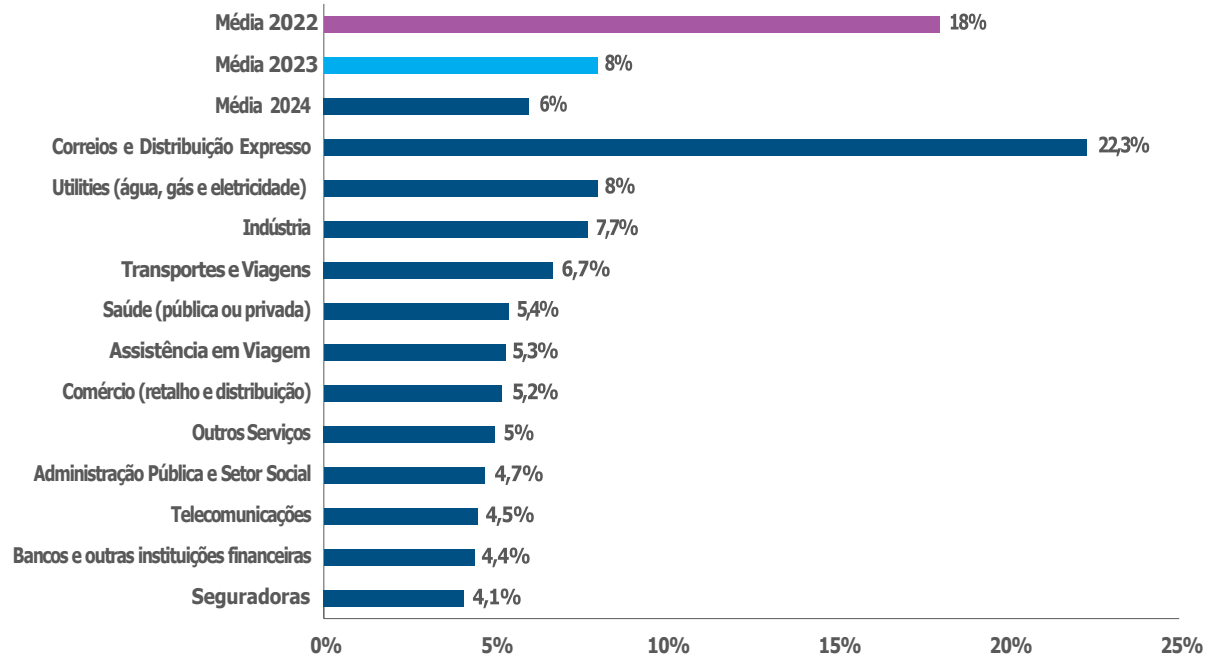


QUESTION: What was the percentage of contacts with internal monitoring in 2024?

COMMENT: Following the significant retraction of this indicator, which fell from 2022 (18%) to 2023 (8%), we note yet another decrease in the percentage of contacts subject to internal monitoring, which is now set at 6%. The sectors with the highest percentages are Postal Services and Express Delivery (22.3%) and Utilities (8%). The lowest values occur in Insurance Companies (4.1%) and Banks and other Financial Institutions (4.4%).

FIGURE 82

PERCENTAGE OF CONTACTS WITH INTERNAL MONITORING (N=1320)

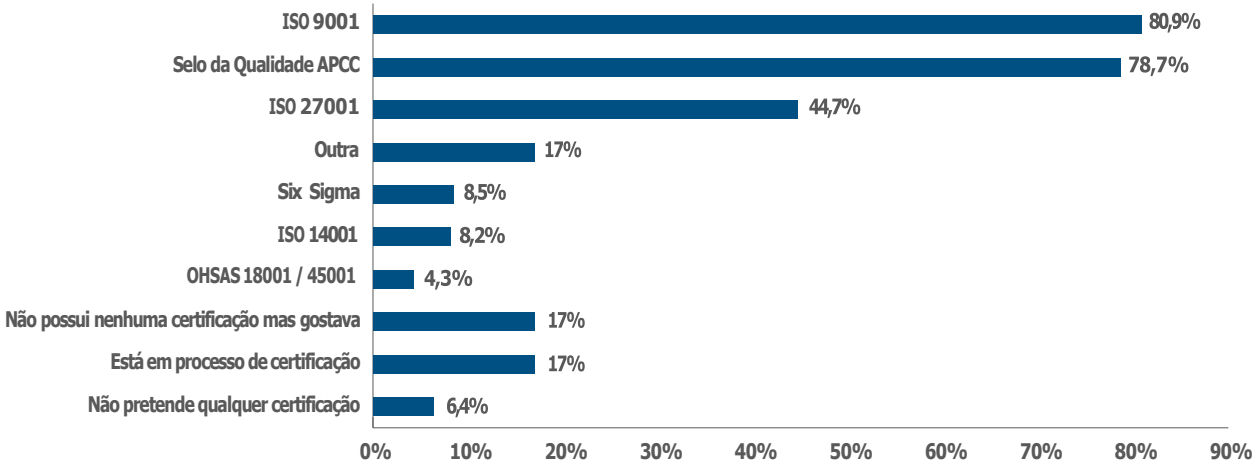


QUESTION: What quality certifications does your Contact Center have?

COMMENT: Contact Center Industry companies continue to invest in certification, both for the recognition of the high quality of the services provided, whether to internal or external Customers, and to support continuous improvement processes, aiming for excellence. Among the responding Operations, we found that 59.6% have at least one certification, 17% are in a certification process, 17% do not have any certification but wish to obtain one, and only 6.4% stated that they have no interest or intention in obtaining certification. Among the certified operations, 80.9% chose ISO 9001 and 78.7% opted for the APCC Quality Seal (compared to 68.9% in 2023, indicating the growing prestige and growth of this specific certification for Contact Centers).

FIGURE 83

MAIN CONTACT CENTER QUALITY CERTIFICATIONS (N=1453)

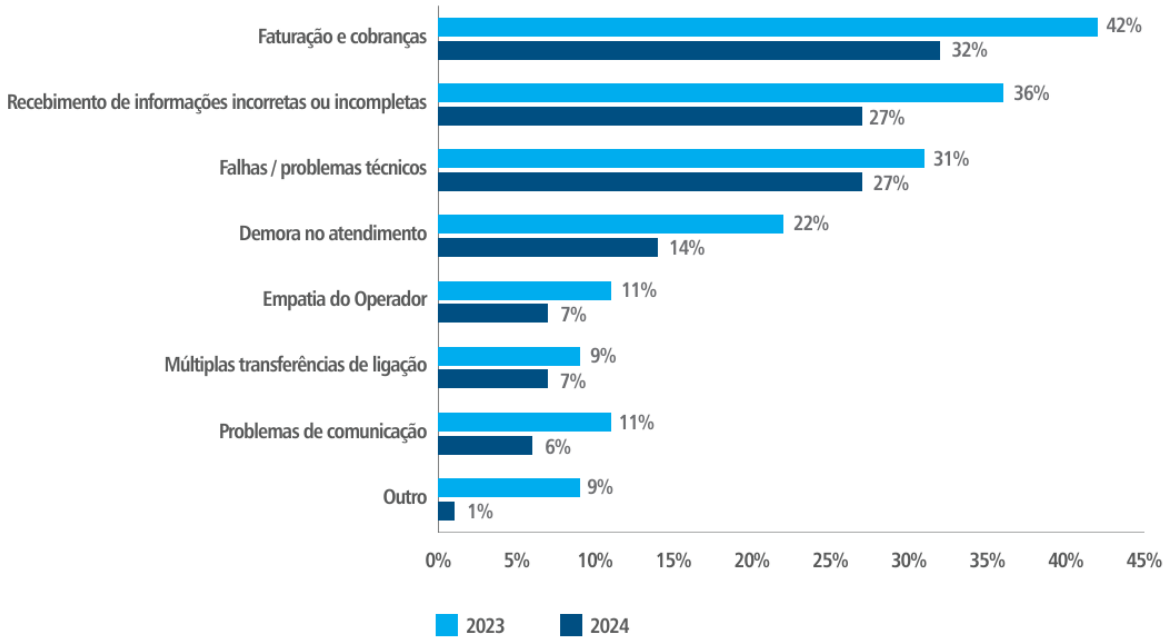


QUESTION: What were the main reasons for complaints received, concerning the Contact Center, in 2024?

COMMENT: The most cited reasons for complaints concerning the Contact Center service continue to be "Billing and Collections" (32%), "Technical failures/problems", and "Receiving incorrect or incomplete information" (both at 27%). The least cited reasons are "Communication issues" (6%), "Multiple call transfers", and the "Operator's Empathy" (both at 7%).

FIGURE 84

MAIN REASONS FOR COMPLAINTS CONCERNING THE CONTACT CENTER (N=1030)



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

COMMENT: The percentage of Operations that invest and intend to continue investing in Customer Experience projects has increased, rising from 92% in 2023 to 93% in 2024. The remaining 7% who have not yet invested all expressed the intention to do so.

FIGURE 85

INVESTIMENT IN CUSTOMER EXPERIENCE PROJECTS (2023) (N=1313)

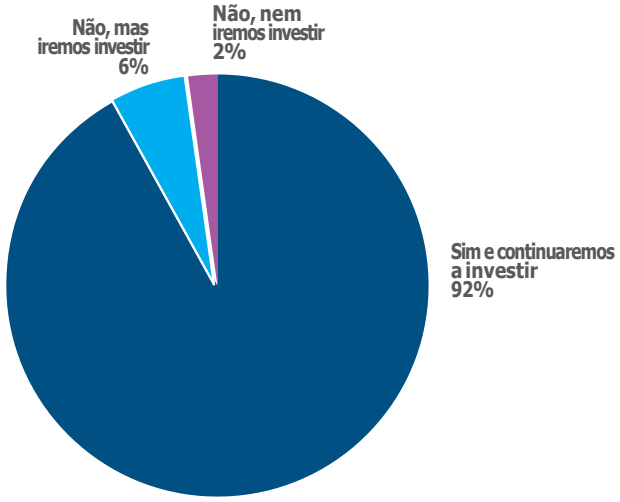
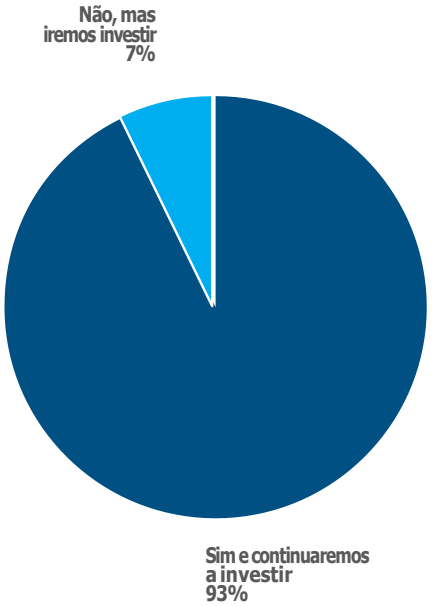


FIGURA 86

INVESTIMENT IN CUSTOMER EXPERIENCE PROJECTS (2024) (N=1715)



08

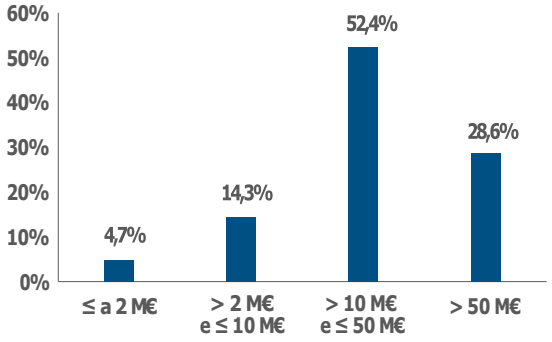
FINANCIAL DATA

QUESTION: Considering the following intervals, what was the Contact Center turnover in 2024?

COMMENT: This question was asked only to the Outsourcers, and the responses reflect the dimensions of these Economic Agents that are so relevant to our Industry. 52.4% of the Outsourcers report a turnover between €10 million and €50 million, and 28.6% indicate a turnover of more than €50 million.

FIGURE 87

DISTRIBUTION OF OUTSOURCERS' TURNOVER IN EM 2024 (N=1060)

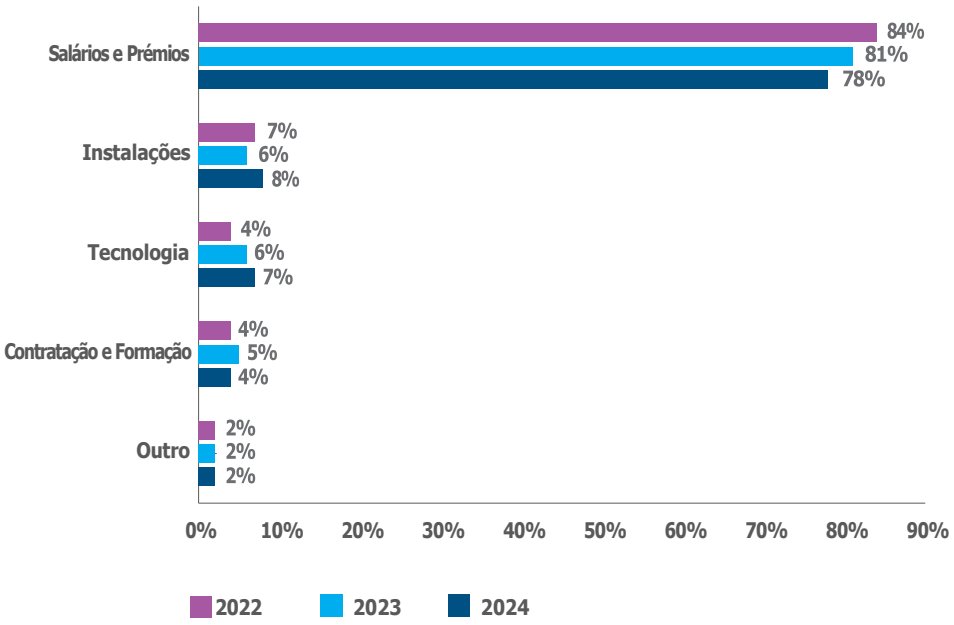


QUESTION: What is the OPEX distribution per main items?

COMMENT: Being an industry whose activity relies on Human Resources, the percentage weight of Salaries and Bonuses is the most significant, although it has been observed that it decreased from 2023 to 2024 (from 81% to 78%). This reduction in percentage weight was caused by the increase in percentage weights of Facilities (from 6% to 8%) and Technology (from 6% to 7%). The item Recruitment and Training shows a slight decline from 5% to 4%.

FIGURE 88

OPEX DISTRIBUTION PER MAIN ITEMS (N=1156)

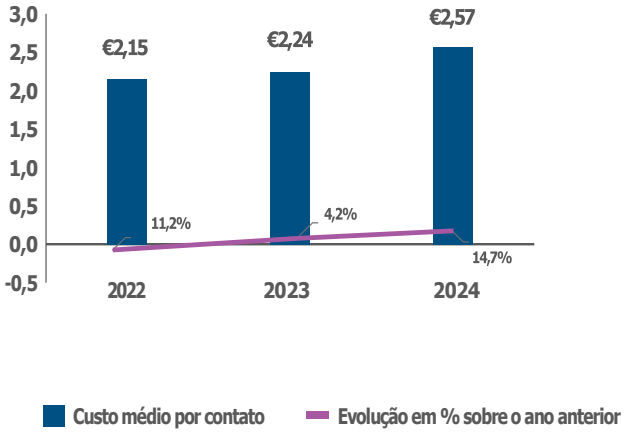


QUESTION: What is the average cost per contact?

COMMENT: Being one of the questions in the Benchmarking Study with the lowest volume of responses, its conclusions cannot be taken as absolute, but only as revealing trends. In 2024, we recorded €2.57, with a growth of 14.7% compared to 2023. Taking the year 2022 as a starting point, the average cost per contact increased by 19.5%.

FIGURE 89

AVERAGE COST PER CONTACT EVOLUTION (N=497)

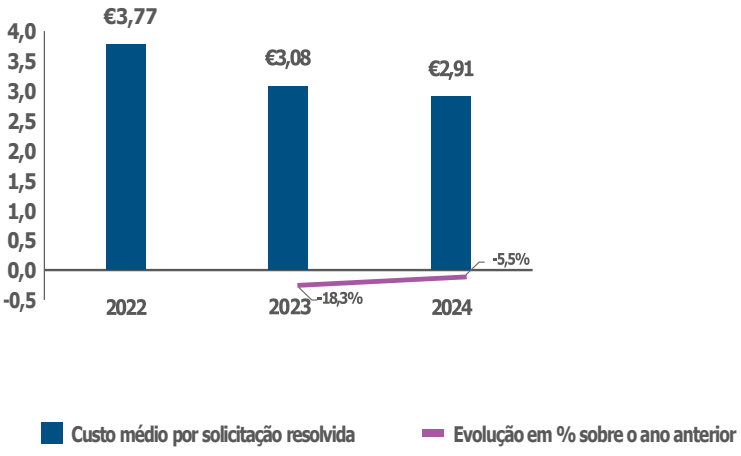


QUESTION: What is the average cost per request solved?

COMMENT: Also in this regard, the small number of responses suggests looking at the results as indicators of trends rather than absolute values. In 2024, we recorded €2.91, with a decrease of 5.5% compared to the previous year, a year in which a reduction of 18.3% compared to 2022 had already been registered.

FIGURE 90

AVERAGE COST PER REQUEST SOLVED EVOLUTION (N=440)



apcc

QUALITY SEAL