

# 2006 Contact Center Industry Benchmarking Report The Philippines

Sponsored by:



Endorsed by:



**callcentres.net**

knowledge to make smart calls

**callcentres.net**

**contact**  
news asia 

# Introduction

- The **2006 Contact Center Industry Benchmarking Report – The Philippines**, is researched and published by callcentres.net.
- This report is part of a study of the contact center industries in six Asian countries: China, India, Malaysia, The Philippines, Singapore and Thailand.
- callcentres.net has produced the Asian Contact Center Industry Benchmarking Report since 1997.
- 67 telephone and online interviews with contact center managers and decision makers in The Philippines were conducted in November 2006.
- The total number of contact center seats included in this study is 45,285 which is estimated to be 43% of the total Philippines industry seat size. As such, this sample is sufficient to make generalisations of the results to the wider contact center industry in The Philippines.

- All results in this report have been cross-tabulated by contact center size.
- Z-tests were conducted to test statistically significant differences between the subgroups. Where a difference is proven to be statistically significantly different these have been highlighted in orange in the relevant tables as shown below.

	<20 seats	20-49 seats	50-99 seats	100+ seats
Yes	33%	59%	38%	74%

 Indicates value is statistically significantly higher

## Definitions of statistical terms:

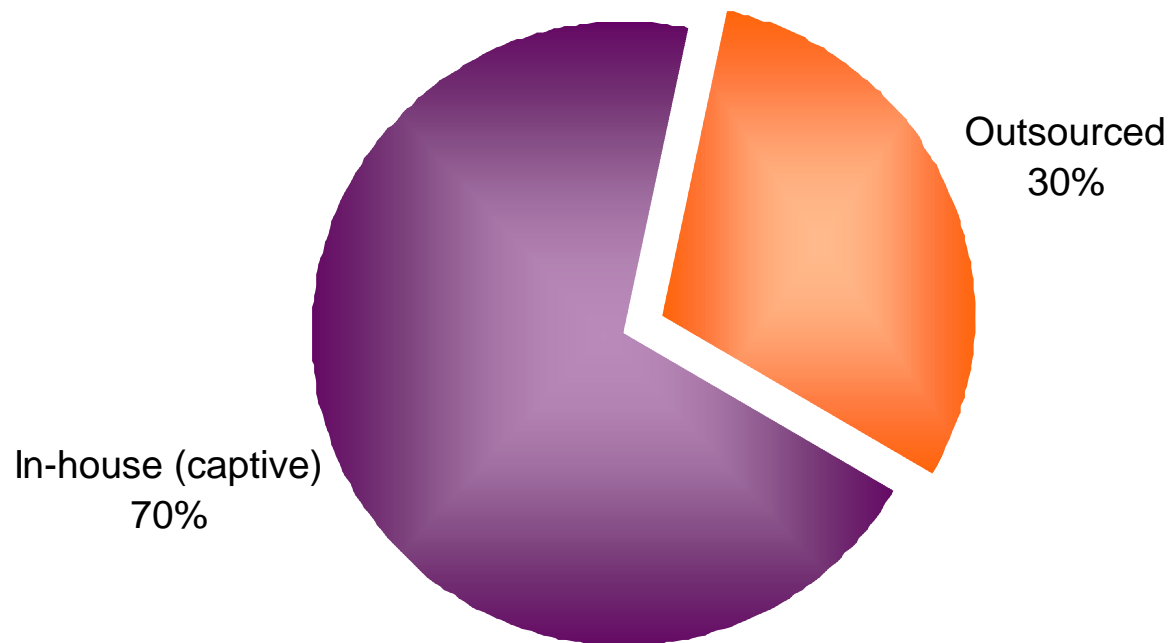
- *Mean* (or average) – the sum of all values divided by the number of values.
- *Median* (or midpoint) – the number in a range of values that falls exactly in the middle so that 50% of the cases are above or below.
- *Mode* – the most frequently occurring value in a range of values.
- *Statistically significant difference* - there is a difference between the means of two groups that has a very low probability of having occurred by chance or error.



# Sample

- In-house (captive) versus outsourced contact centers
- Industry Breakdown

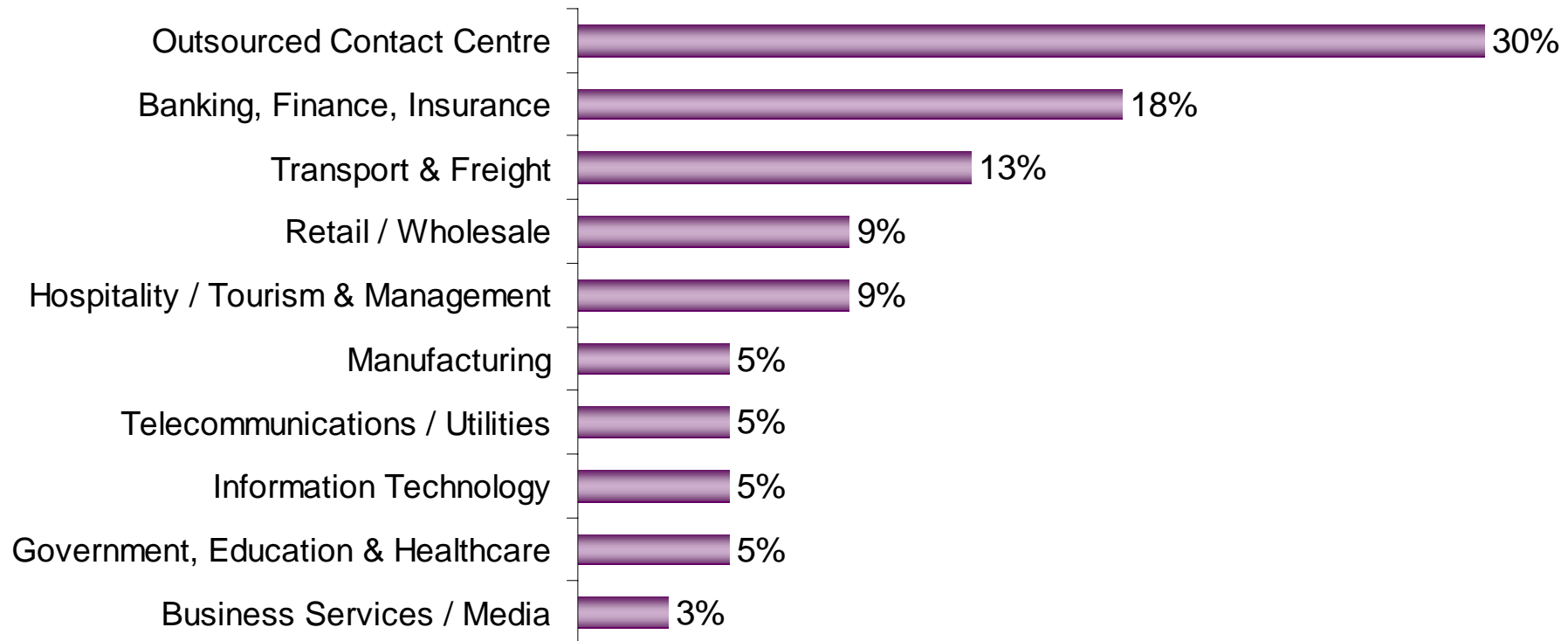
## In-house (captive) versus outsourced contact centers



70% of the respondents' contact centers in The Philippines are in-house (captive) centers.

N=67

## Industry



N=67



# Market Profile

- Number of contact center seats in The Philippines and per organisation
- Number of contact centers per organisation
- Countries serviced
- Languages spoken and required
- Opening days

# Market Profile

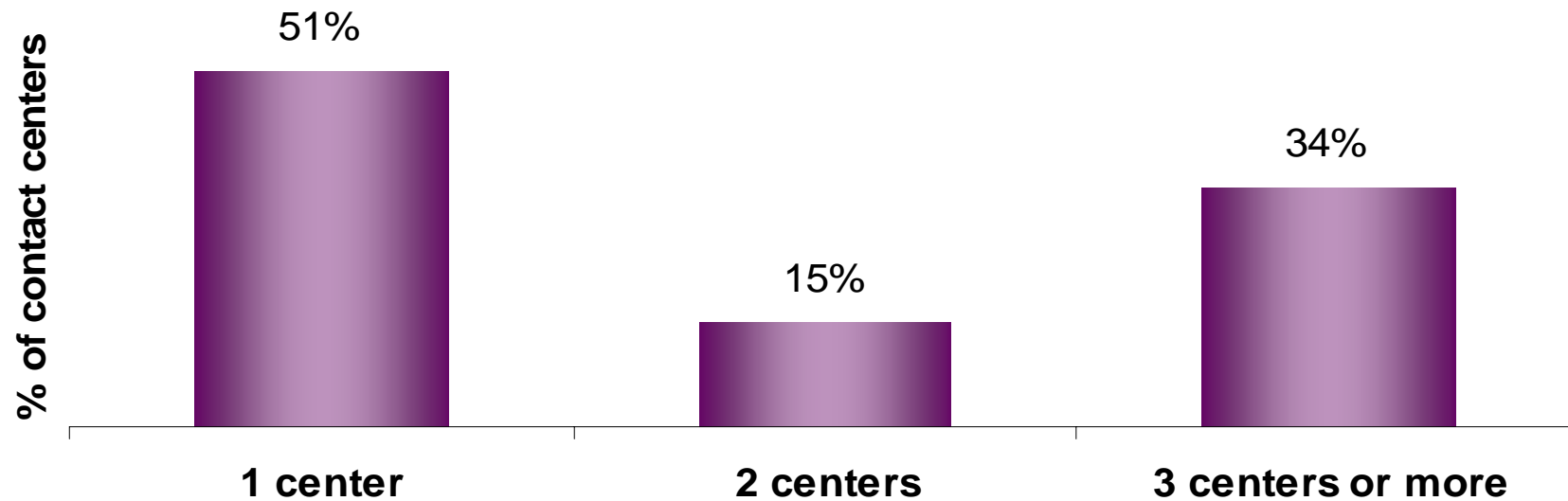
The total number of contact center seats in The Philippines in 2006 is estimated to be 105,000.

This number is projected to increase to 140,000 seats in 2007. This is a 33% growth rate.

Country	Seats 2006	Seats 2007 (estimated)	2006-2007 Growth Rate
China	130,000	158,000	22%
India	270,000	312,500	16%
Malaysia	28,000	37,000	32%
<b>Philippines</b>	<b>105,000</b>	<b>140,000</b>	<b>33%</b>
Singapore	19,000	25,000	32%
Thailand	24,000	32,000	33%



## Number of Contact Centers Per Organisation



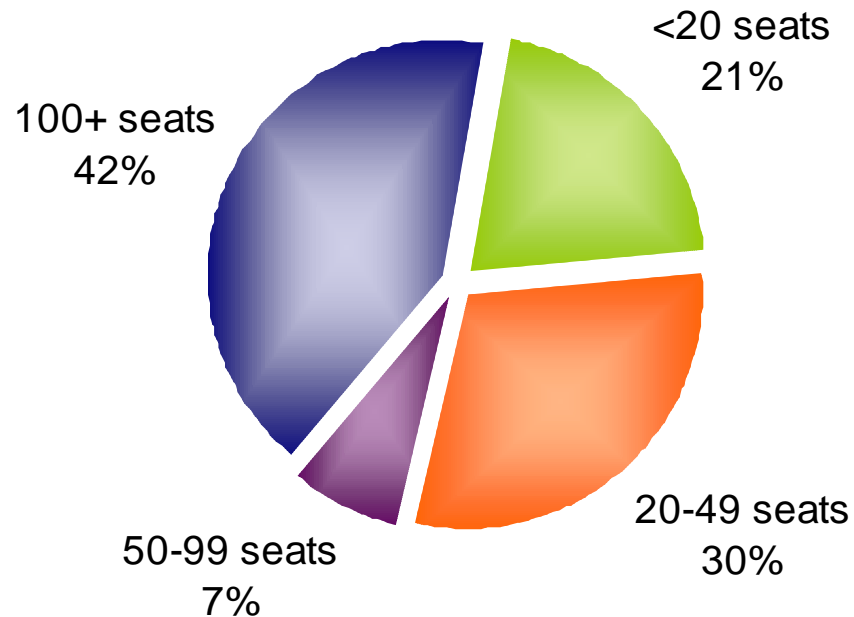
Country	1 Center	2 Center	3 Center
China	81%	8%	11%
India	68%	14%	18%
Malaysia	55%	19%	26%
<b>The Philippines</b>	<b>51%</b>	<b>15%</b>	<b>34%</b>
Singapore	80%	18%	2%
Thailand	89%	2%	9%

51% of organisations have 1 contact center, 15% have 2 centers and 34% have more 3 centers or more.

N=67

# Market Profile

## Number of Seats Per Organisation



In The Philippines, the mean number of seats per organisation is 676. This is predicted to grow to a mean number of 798 seats in 2007.

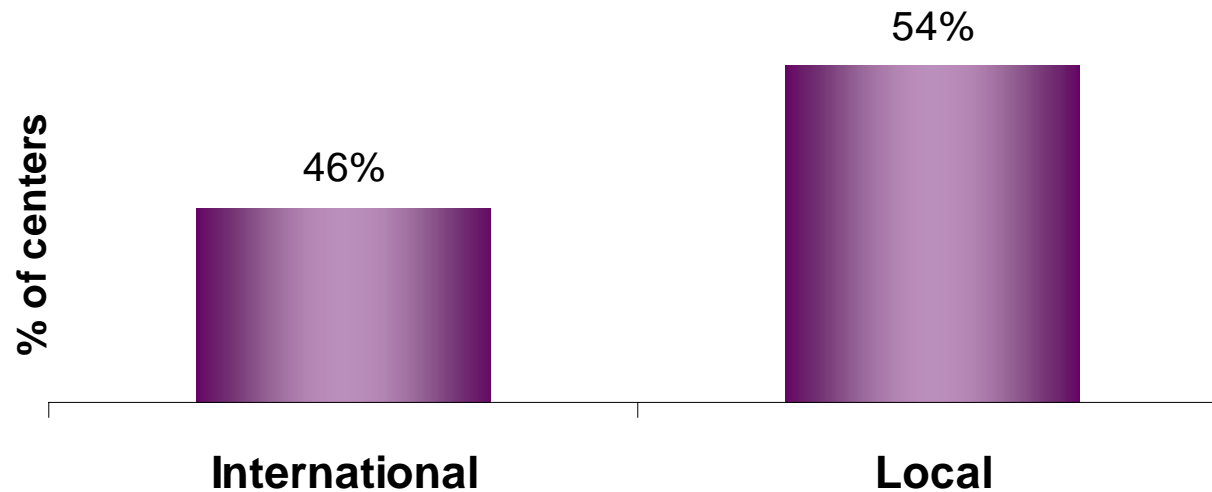
N=67

Mean Seats per Organisation		Median Seats per Organisation	
2006	2007 (predicted)	2006	2007 (predicted)
676	798	48	55

Country	Mean 2006	Mean 2007 (Predicted)
China	149	177
India	522	728
Malaysia	90	110
<b>The Philippines</b>	<b>676</b>	<b>798</b>
Singapore	60	77
Thailand	65	83

# Market Profile

## International versus Local Servicing



46% of contact centers in The Philippines service international markets.

Country	International	Local
China	29%	71%
India	33%	67%
Malaysia	29%	71%
<b>The Philippines</b>	<b>46%</b>	<b>54%</b>
Singapore	37%	63%
Thailand	3%	<b>97%</b>

N=67

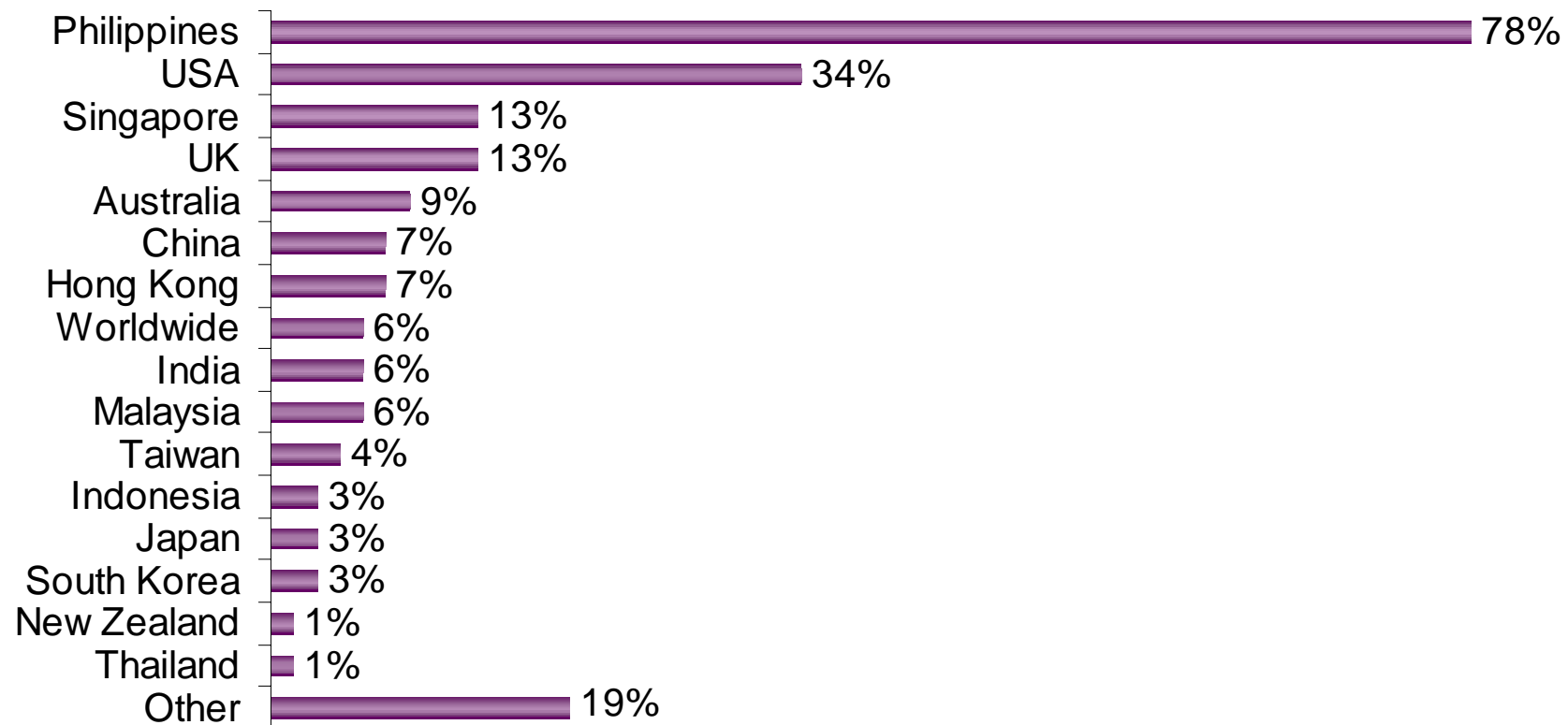
## International versus Local Servicing

Servicing	<20 seats	20-49 seats	50-99 seats	100+ seats
Local	79%	65%	60%	32%
International	21%	35%	40%	68%

Servicing	In-house	Outsource
Local	70%	15%
International	30%	85%

There is a statistically significantly higher proportion of larger centers (100+ seats) and outsourced contact centers servicing international markets.

## Countries Serviced by Contact Centers

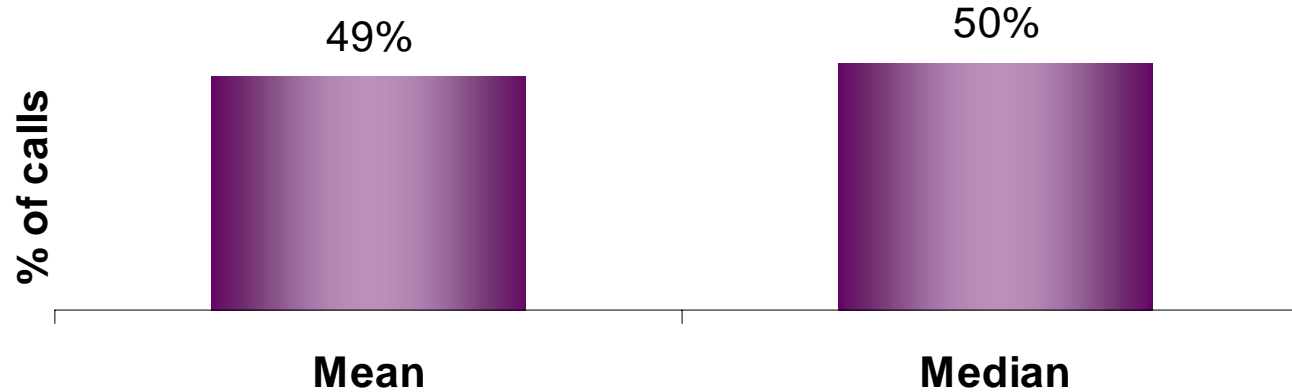


78% of contact centers in The Philippines currently service the domestic market. 34% of contact centers service the USA and 13% service Singapore and the UK.

N=67

# Market Profile

## % of Calls that Require Agents to Speak in a Language other than the National Language



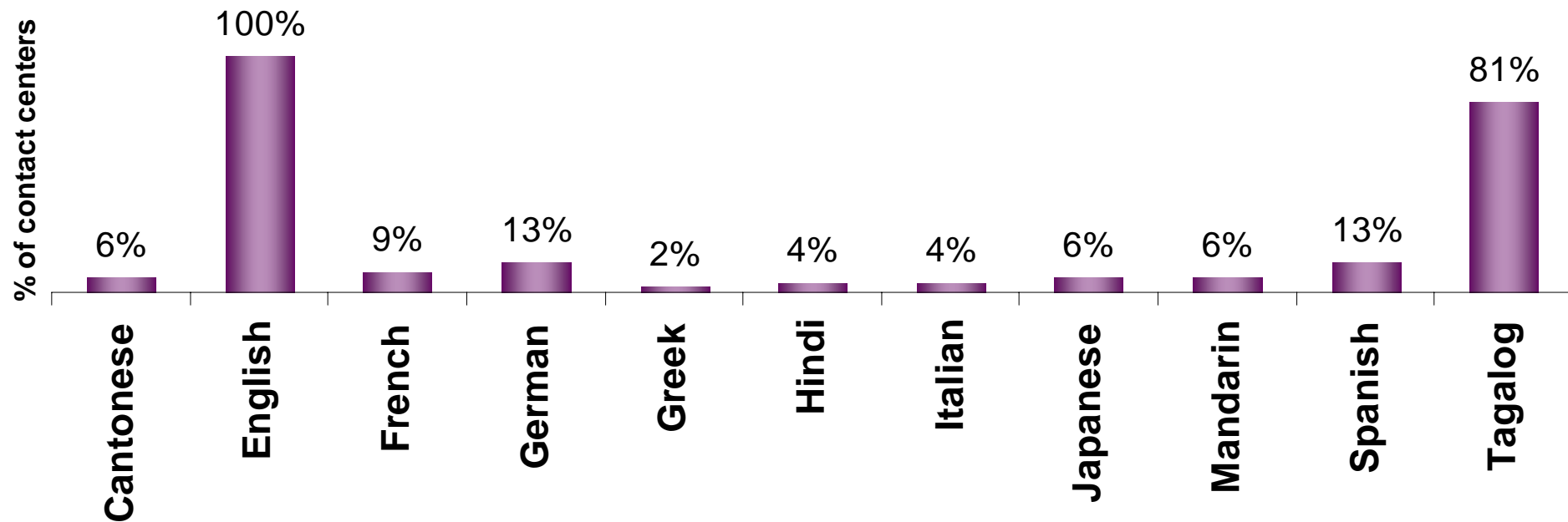
Country	Mean %
China	19%
India	22%
Malaysia	45%
<b>The Philippines</b>	<b>49%</b>
Singapore	20%
Thailand	17%

On average, 49% of calls require agents to speak in a language other than the national language.

N=67

# Market Profile

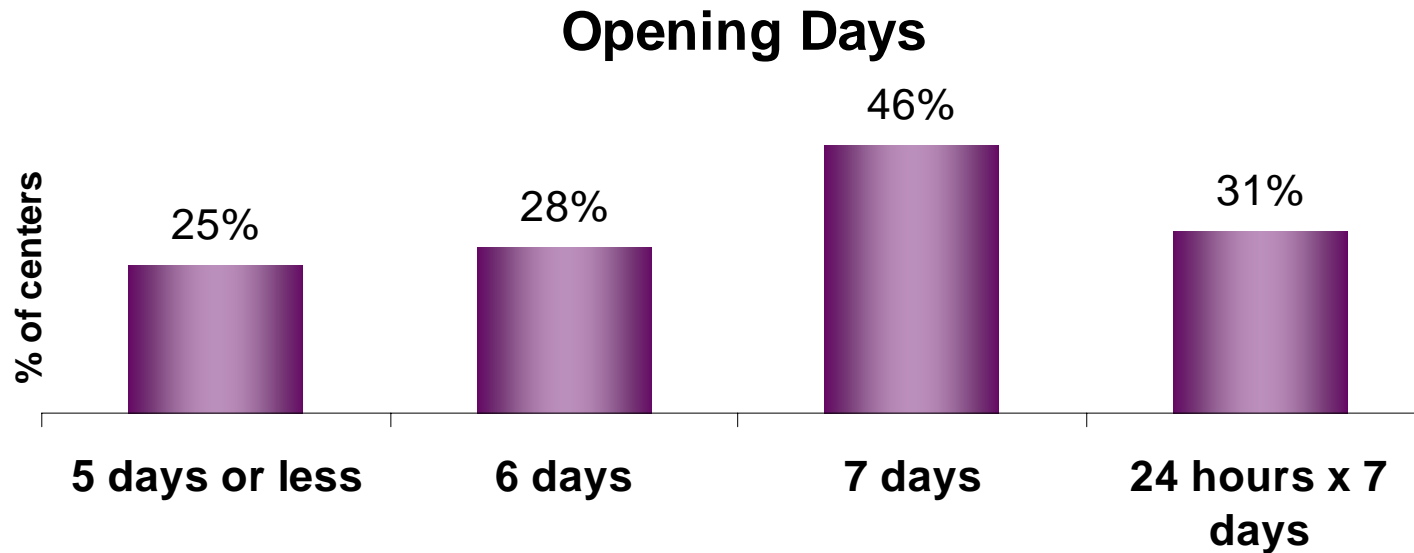
## Languages Spoken in Contact Centers



100% of contact centers in The Philippines require a proportion of agents to speak English to customers. 81% also require a proportion of agents to speak Tagalog to customers.

N=47

# Market Profile



Nearly half of contact centers in The Philippines operate 7 days per week and 31% operate 24 hours a day, 7 days per week.

Country	5 days or less	6 days	7 days	24 X 7
China	1%	6%	90%	56%
India	7%	33%	60%	34%
Malaysia	7%	31%	62%	37%
<b>The Philippines</b>	<b>25%</b>	<b>28%</b>	<b>46%</b>	<b>31%</b>
Singapore	30%	19%	51%	36%
Thailand	14%	6%	80%	55%

N=67



## Opening Days

No. days contact center open per week	<20 seats	20-49 seats	50-99 seats	100+ seats
5 days	43%	25%	0%	21%
6 days	50%	25%	60%	14%
7 days	7%	50%	40%	64%

No. of days contact center open per week	In-house	Outsource
5 days	32%	10%
6 days	36%	10%
7 days	32%	80%
24 X 7	23%	50%

- There is a statistically significantly higher proportion of contact centers with 20 seats or more that open 7 days per week.
- There is also a statistically significantly higher proportion of outsourced contact centers that open 7 days per week and 24 X 7.

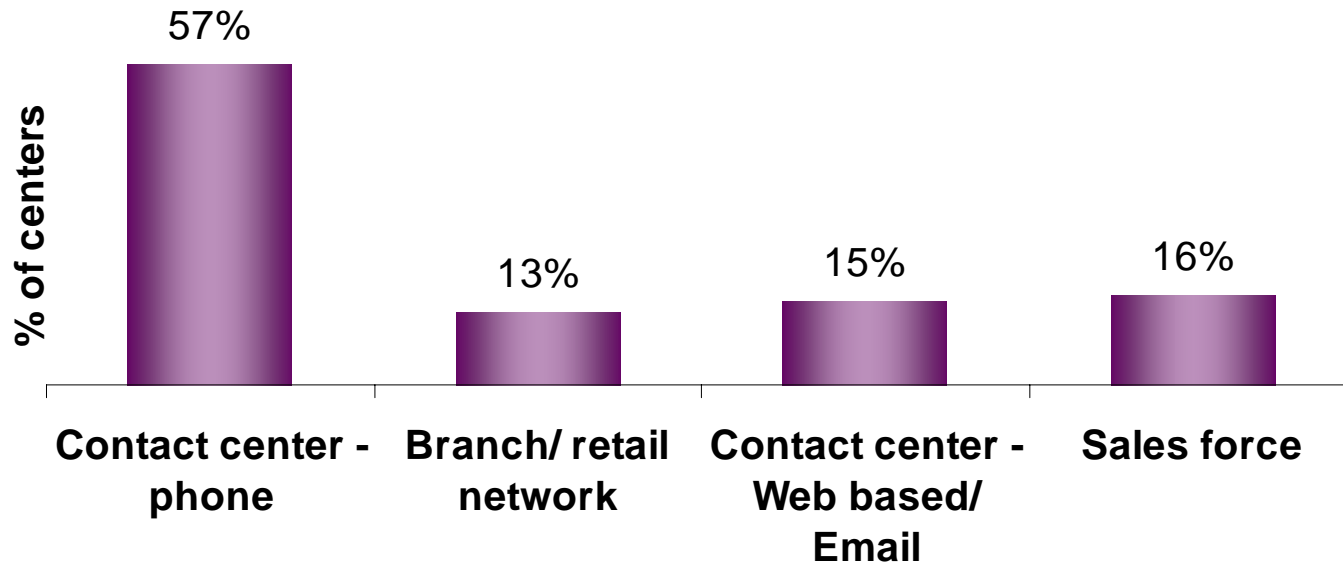


# Contact Handling

- Customer contacts per channel
- Primary work activity
- Transaction and channel volumes
- Inbound and outbound call percentage
- Agent call handling
- Up or cross-selling opportunities

# Contact Handling

Mean % of Customer Contacts per Channel



Over half of all customer contacts are handled over the phone by the contact center.

Country	CC Phone	Branch / Retail	CC Web / Email	Sales Force
China	42%	22%	19%	17%
India	81%	8%	6%	5%
Malaysia	56%	22%	11%	10%
<b>The Philippines</b>	<b>57%</b>	<b>13%</b>	<b>15%</b>	<b>16%</b>
Singapore	66%	15%	11%	8%
Thailand	75%	9%	4%	10%

N=67

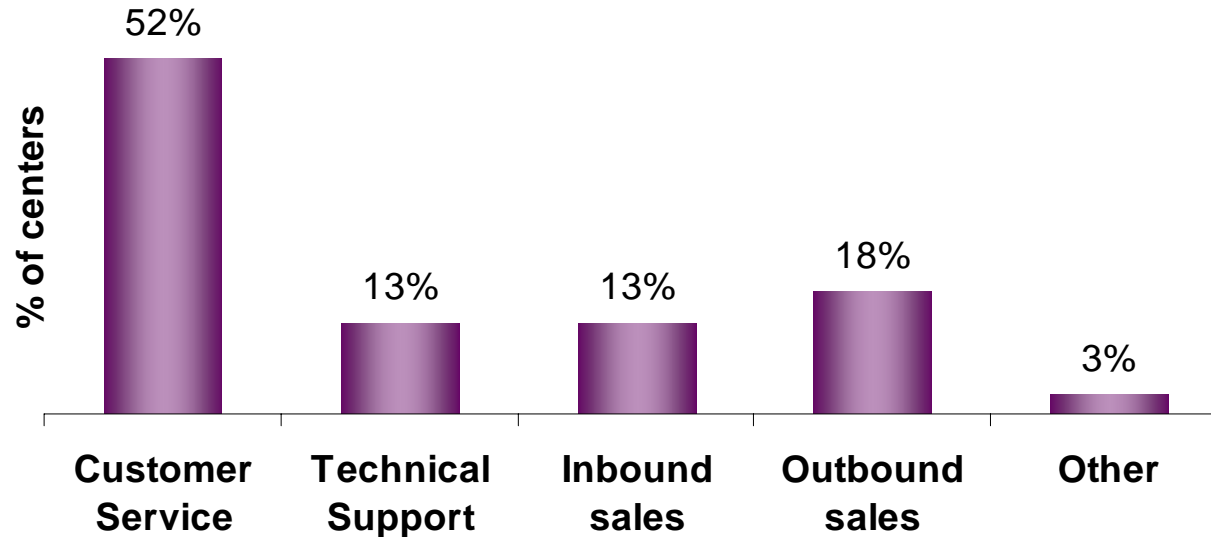
## Customer Contacts Per Channel

Handling of customer contacts	In-house	Outsource
Contact Center - phone	51%	70%
Branch/Retail network	17%	6%
Sales force	18%	11%
Contact Center - web based/Email	15%	14%

There is a statistically significantly higher proportion of outsourced contact centers that handle customer contact over the phone by the contact center and a statistically significantly higher proportion of in-house contact centers that handle customer contact through the branch/retail network and sales force.

# Contact Handling

## Primary Activity at Contact Center



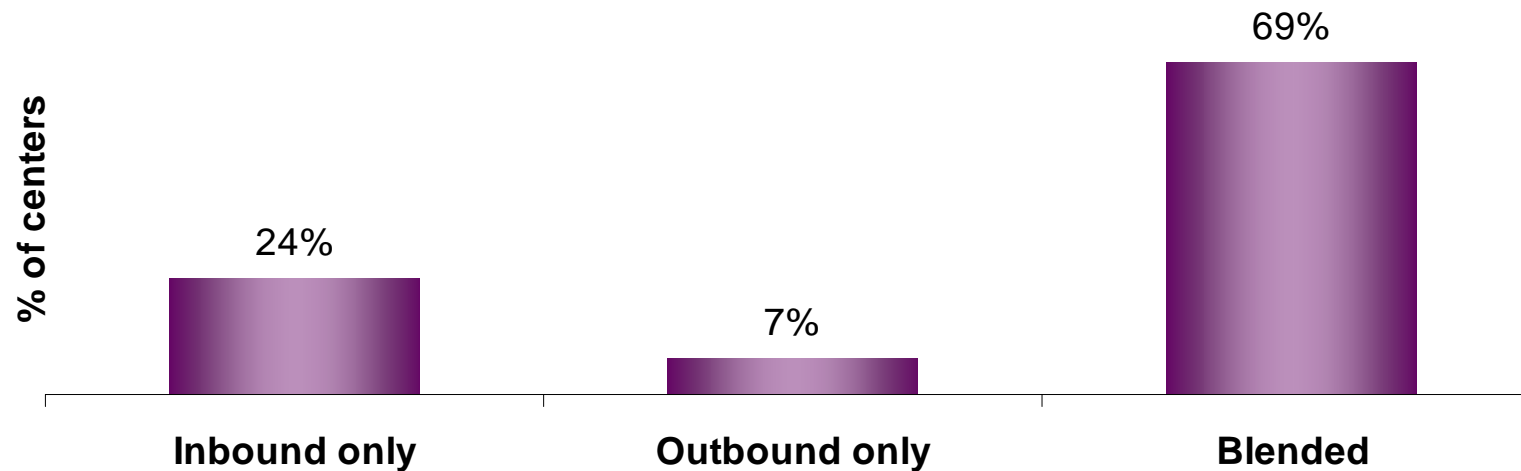
The primary activity at over half of contact centers in The Philippines is providing Customer Service.

Country	Customer Service	Technical Support	Inbound Sales	Outbound Sales
China	55%	28%	14%	3%
India	29%	11%	16%	39%
Malaysia	76%	6%	5%	10%
<b>The Philippines</b>	<b>52%</b>	<b>13%</b>	<b>13%</b>	<b>18%</b>
Singapore	61%	12%	14%	8%
Thailand	75%	12%	11%	2%

N=67

# Contact Handling

## Inbound vs. Outbound Functionality



Country	Inbound Only	Outbound Only	Blended
China	-	-	-
India	42%	36%	22%
Malaysia	39%	7%	54%
<b>The Philippines</b>	<b>24%</b>	<b>7%</b>	<b>69%</b>
Singapore	76%	7%	17%
Thailand	68%	0%	32%

The majority of contact centers in The Philippines have blended functionality.

N=67

# Contact Handling

## Mean Weekly Transaction Volume per Center



Country	Mean Transaction
China	87,572
India	131,036
Malaysia	15,634
<b>The Philippines</b>	<b>160,399</b>
Singapore	13,311
Thailand	38,807

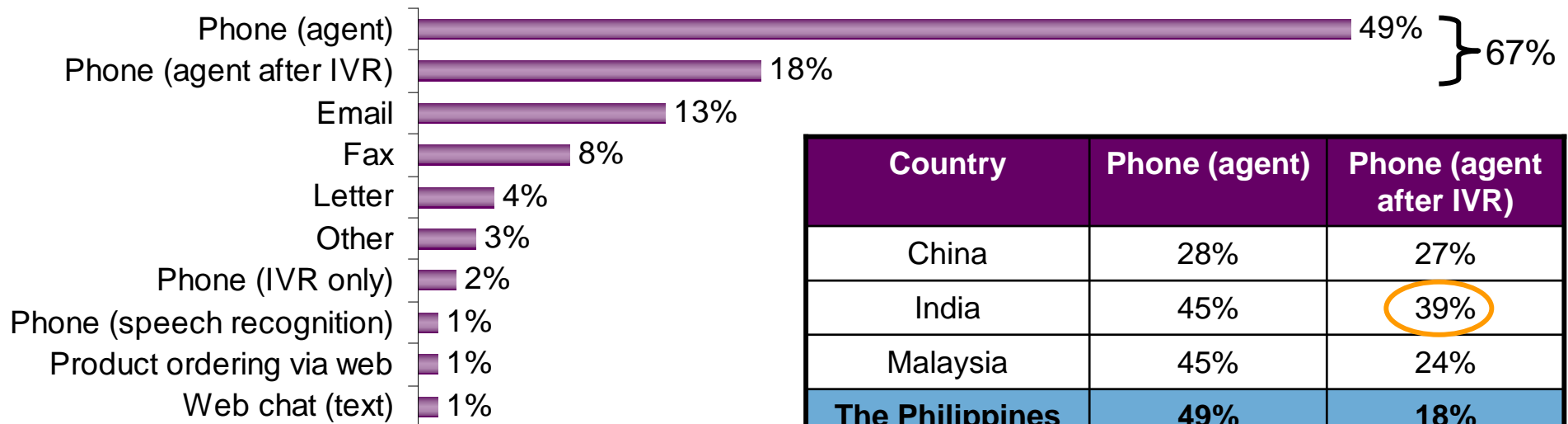
No. of contacts handled in an average week	<20 seats	20-49 seats	50-99 seats	100+ seats
Mean	3,419	5,895	23,320	384,100

Each contact center handles an average of 160,399 transactions per week.

N=67

# Contact Handling

## Channel Volumes



Country	Phone (agent)	Phone (agent after IVR)
China	28%	27%
India	45%	39%
Malaysia	45%	24%
<b>The Philippines</b>	<b>49%</b>	<b>18%</b>
Singapore	63%	18%
Thailand	61%	19%

The share of transactions through each channel shows a high reliance on agents. Agents handle 49% of all transactions that come through the contact center with no automation, plus an additional 18% of transactions after some functions have been handled by the IVR.

N=67



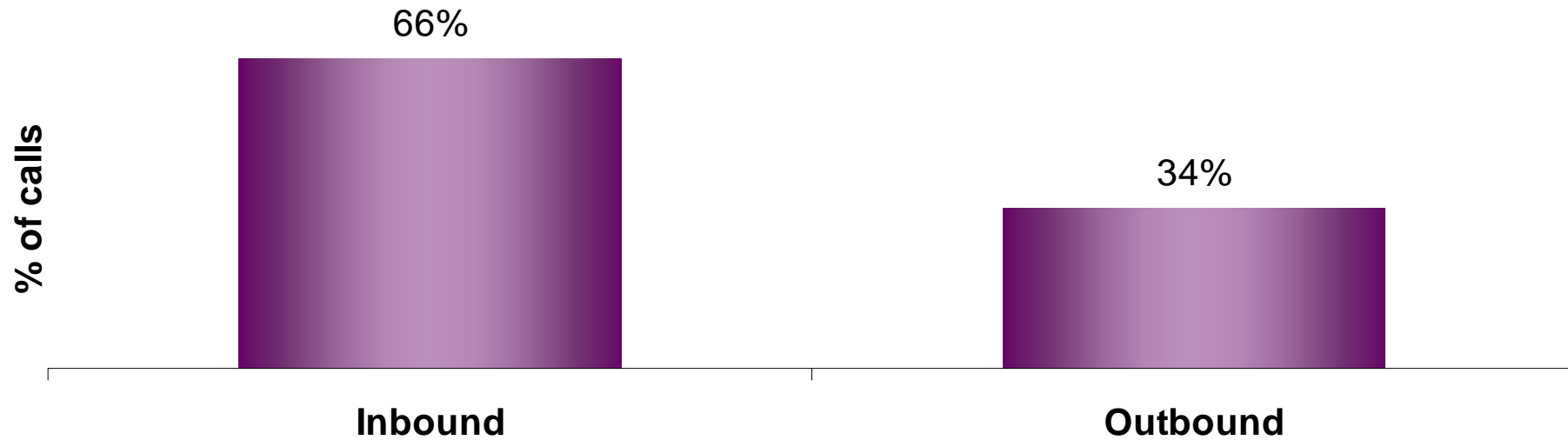
## Contact Center Transactions

Handling contact center transactions (mean %)	In-house	Outsource
Phone (agent)	50%	45%
Phone (agent after IVR)	13%	32%
Email	15%	8%
Fax	10%	2%
Letter	5%	2%
Phone (IVR)	1%	4%
Product ordering via web	1%	2%
Web chat (text)	1%	1%
Phone (speech recognition)	1%	2%
Web chat (voice)	0%	1%

- There is a statistically significantly higher proportion of outsourced contact centers handling transactions by phone (agent after IVR).
- There is also a statistically significantly higher proportion of in-house contact centers that handle transactions by email and fax.

# Contact Handling

## Inbound and Outbound % of Total Calls



66% of total calls handled by contact centers in The Philippines are inbound.

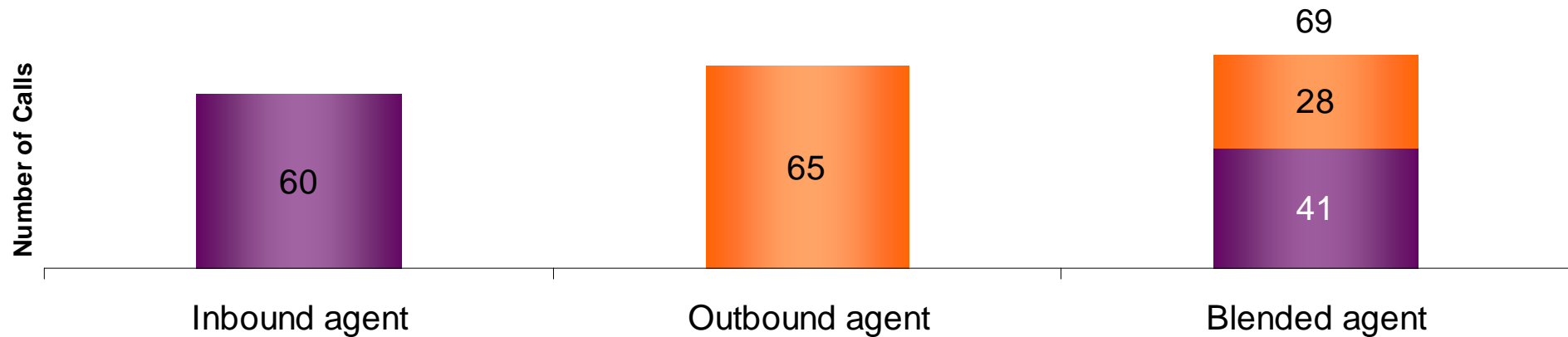
Country	Inbound	Outbound
China	66%	34%
India	52%	48%
Malaysia	67%	33%
<b>The Philippines</b>	<b>66%</b>	<b>34%</b>
Singapore	81%	19%
Thailand	83%	17%

N=67

# Contact Handling

N=67

## Agent Call Handling - no. of calls per agent per shift



Inbound, outbound and blended agents all handle between 60 - 70 calls per shift per day.

Country	Inbound Agent	Outbound Agent	Blended Agent
China	96	94	95
India	78	82	54
Malaysia	82	78	98
<b>The Philippines</b>	<b>60</b>	<b>65</b>	<b>69</b>
Singapore	73	78	72
Thailand	98	93	93

## Agent Call Handling

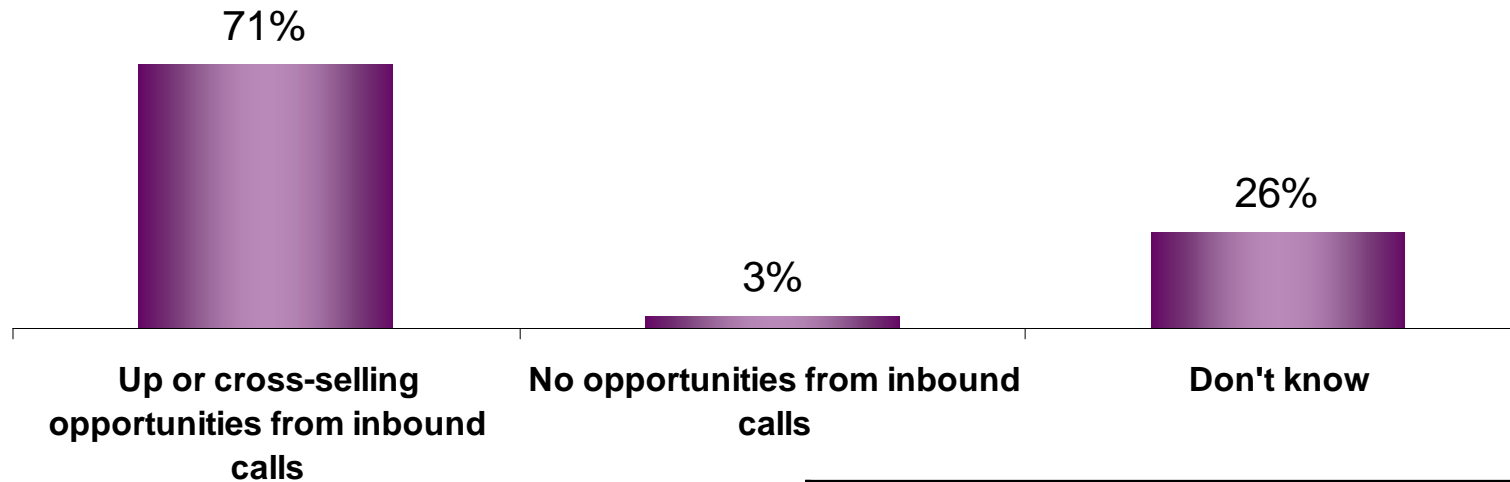
No. of calls handled by agents	In-house	Outsource
Inbound only	48	81
Outbound only	55	74
Blended	45 inbound + 28 outbound	26 inbound + 28 outbound

Inbound only agents in outsourced contact centers handle a statistically significantly higher number of calls than inbound only agents in in-house contact centers.

# Contact Handling

N=67

## % of Contact Centers that Report an Up or Cross-Selling Opportunities from Inbound Calls



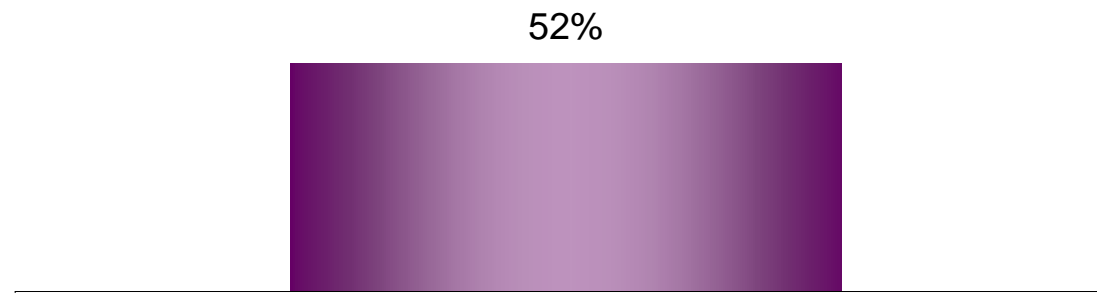
71% of contact centers in The Philippines report opportunities to up or cross-sell from inbound calls.

Country	Opportunities	No Opportunities
China	68%	32%
India	22%	78%
Malaysia	69%	7%
<b>The Philippines</b>	<b>71%</b>	<b>3%</b>
Singapore	36%	64%
Thailand	15%	71%

# Contact Handling

N=67

## Mean % of Total Inbound Calls that Present an Up or Cross-Selling Opportunity



Of those contact centers in The Philippines that report opportunities to up or cross-sell from total inbound, on average, 52% of all inbound calls present an opportunity to up or cross sell.

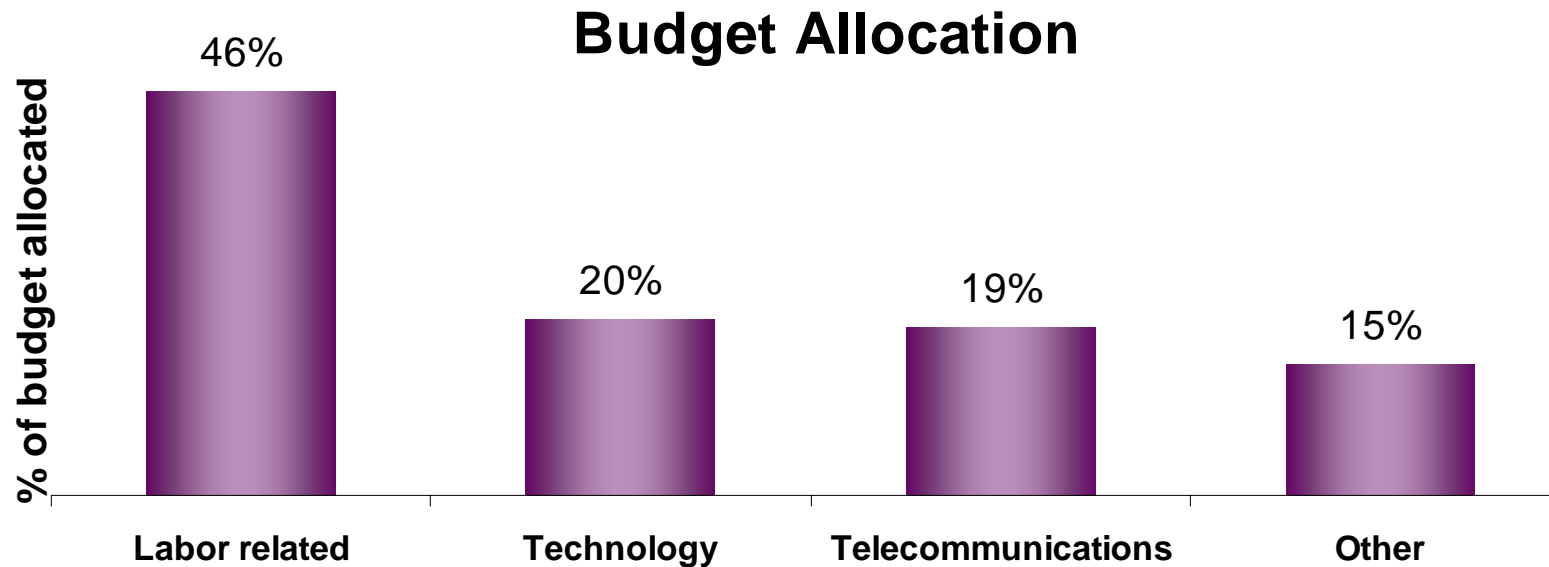
Country	Mean %
China	13%
India	60%
Malaysia	25%
<b>The Philippines</b>	<b>52%</b>
Singapore	28%
Thailand	46%



# Budgets and Costs

- Budget allocation
- Cost per seat and optimised cost per transaction

# Budgets and Costs



On average, 46% of the total contact center budget in The Philippines is allocated to labor related expenses. 20% of budget is allocated to technology expenses and 19% is allocated to telecommunications.

Country	Labor	Technology	Telecomm.
China	38%	30%	21%
India	50%	18%	20%
Malaysia	40%	24%	22%
<b>The Philippines</b>	<b>46%</b>	<b>20%</b>	<b>19%</b>
Singapore	46%	23%	19%
Thailand	49%	28%	13%

N=67



# Budgets and Costs

## Cost per Seat and Optimised Cost per Transaction

	\$USD			Local Currency		
	Annual Cost per Seat	Hourly Cost per Seat	Cost per Transaction	Annual Cost per Seat	Hourly Cost per Seat	Cost per Transaction
China	13,543	3.62	0.30	105,910	28.29	2.36
India	15,872	4.24	0.35	710,201	189.69	15.81
Malaysia	34,779	9.29	0.77	123,333	32.94	2.75
<b>The Philippines</b>	<b>18,086</b>	<b>4.83</b>	<b>0.40</b>	<b>890,440</b>	<b>237.83</b>	<b>19.82</b>
Singapore	66,998	18.46	1.54	103,673	27.69	2.31
Thailand	18,527	4.95	0.41	667,140	27.69	2.31

Please note these calculations are based on one seat operating 12 hours a day, 6 days a week (3,744 hours per annum). The seat on average handles 12 contacts per hour (44,928 contacts per annum), with an average call duration of 3 minutes and an average wrap time of 1 minute. The occupancy rate of this seat is averaged at 80%.

The transaction cost is an estimate of what an optimally performing contact center in should cost given these conditions.



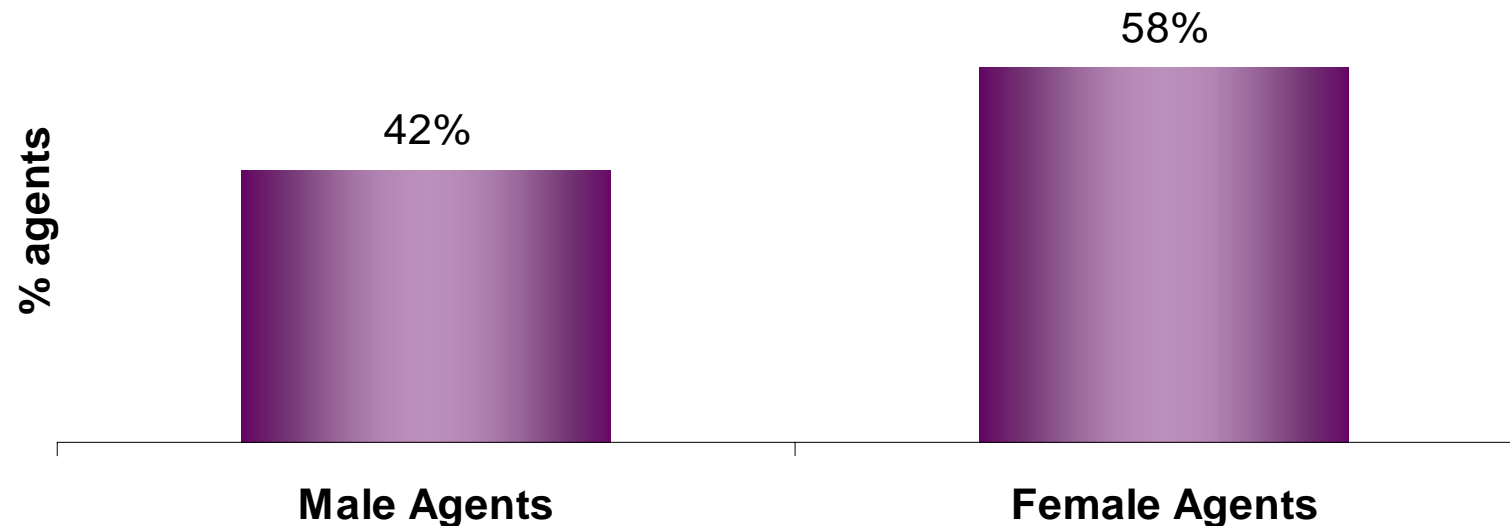
# Human Resources

- Agent gender and age
- Staff salary
- Staff ratios
- Agent training
- Agent sick leave
- Staff attrition and tenure

# Human Resources

N=67

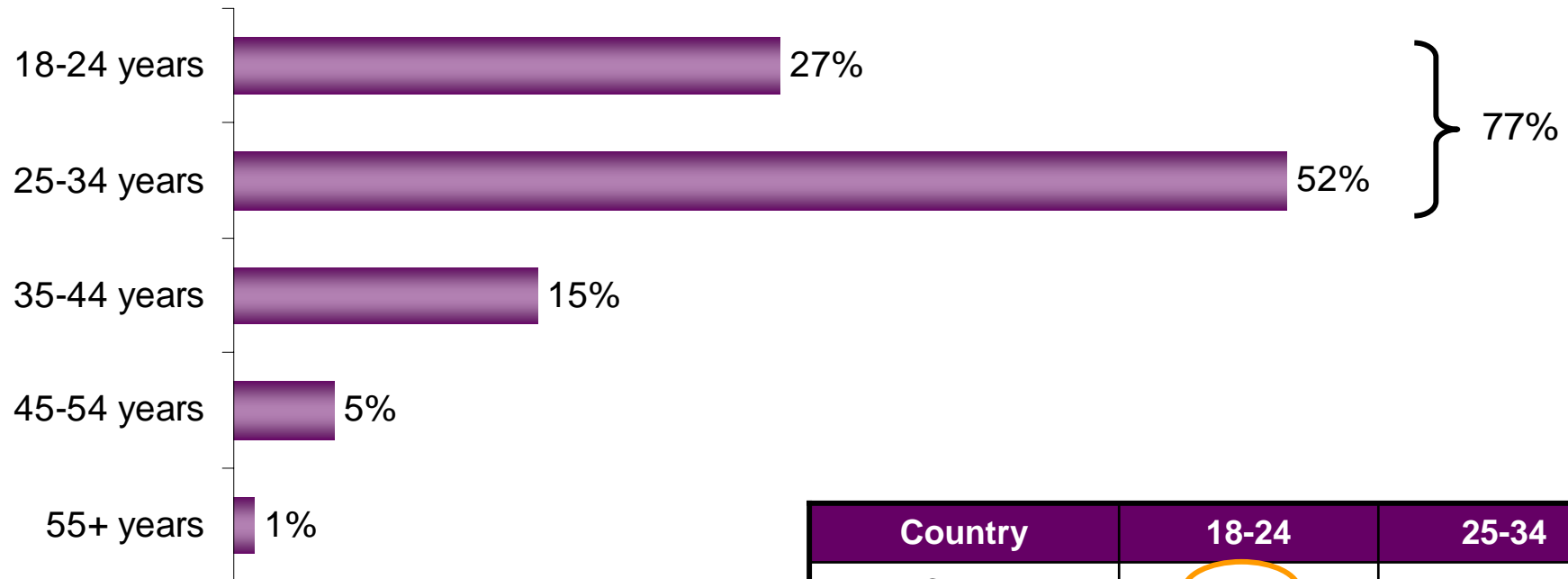
## Agent Gender



Agent gender in contact centers in The Philippines is fairly evenly split. 42% are male and 58% are female.

Country	Male	Female
China	13%	87%
India	47%	53%
Malaysia	39%	61%
<b>The Philippines</b>	<b>42%</b>	<b>58%</b>
Singapore	32%	68%
Thailand	24%	76%

## Age of Agents



Agents in The Philippines are predominantly aged between 18-34 years.

Country	18-24	25-34
China	82%	16%
India	62%	30%
Malaysia	31%	43%
<b>The Philippines</b>	<b>27%</b>	<b>52%</b>
Singapore	48%	37%
Thailand	35%	51%

N=67

# Human Resources

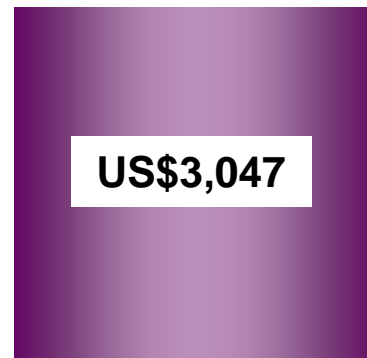
## Full-Time Agent Annual Base Salary (PHP)

PHP 164,848



Mean

PHP 150,000



Median

Country	Mean (US\$)
China	\$2,558
India	\$3,334
Malaysia	\$5,442
<b>The Philippines</b>	<b>\$3,348</b>
Singapore	\$13,667
Thailand	\$3,656

Full-time agents in The Philippines are paid on average PHP 164,848 per year, with a median of PHP 150,000.

N=67

\*Information was collected in local currency and converted into US dollars with the following exchange rate: 1 USD : 49.23 PHP

# Human Resources

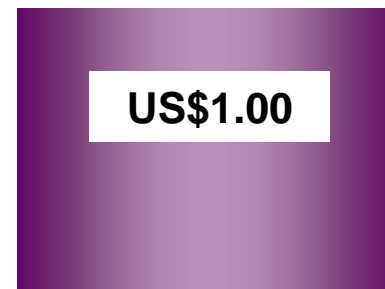
## Part-Time Agent Hourly Rate (PHP)

PHP 69



Mean

PHP 45



Median

Country	Mean (US\$)
China	\$1.10
India	\$3.10
Malaysia	\$2.40
<b>The Philippines</b>	<b>\$1.40</b>
Singapore	\$5.40
Thailand	\$0.90

Part-time agents are paid on average PHP 69 per hour, with a median of PHP 45.

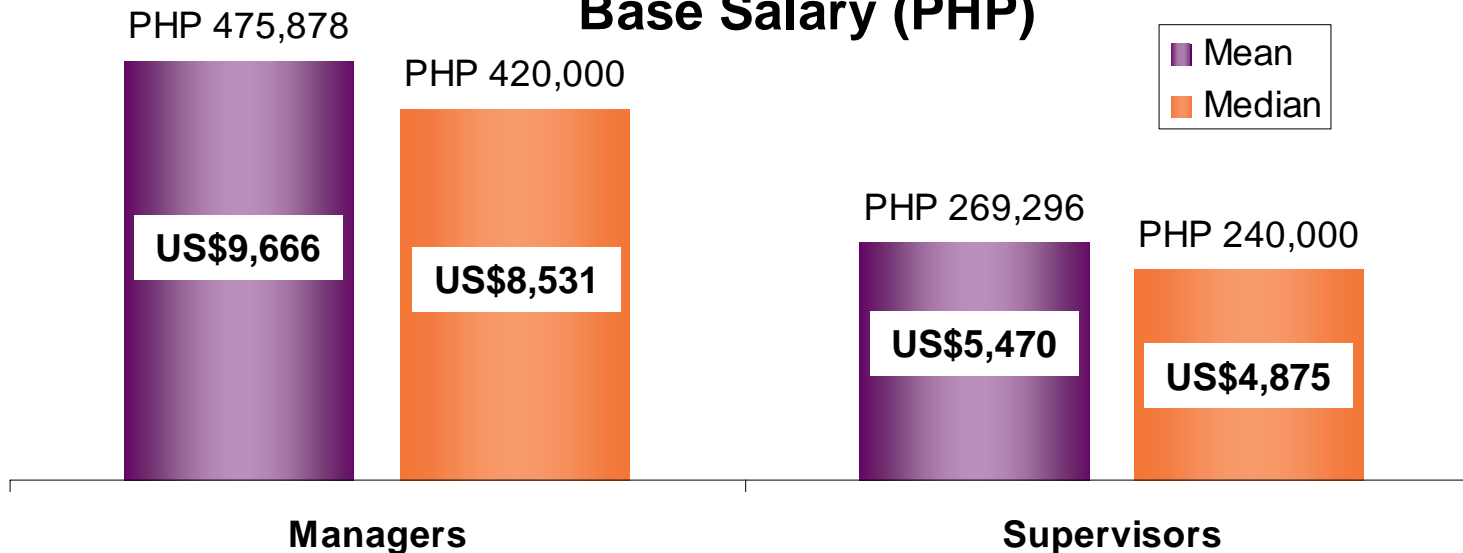
N=67

\*Information was collected in local currency and converted into US dollars with the following exchange rate: 1 USD : 49.23 PHP

# Human Resources

N=67

## Contact Center Managers' and Supervisors' Annual Base Salary (PHP)



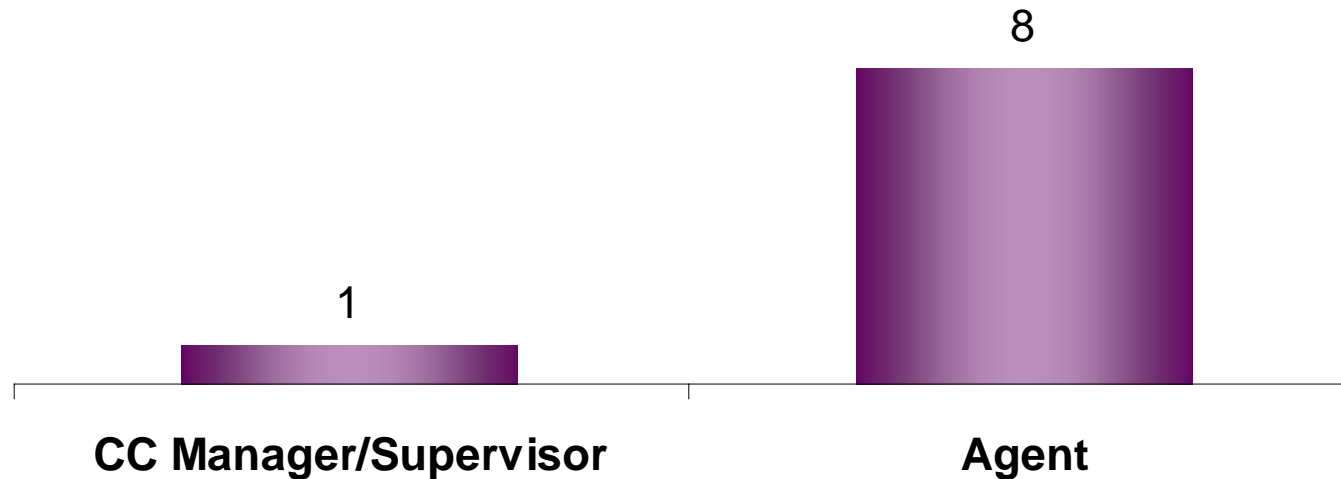
- The average annual salary for a contact center manager is PHP 475,878 (median = PHP 420,000).
- Team Leaders / Supervisors receive an average of PHP 269,296 per year (median = PHP 240,000).

Country	Managers Mean (US\$)	Supervisors Mean (US\$)
China	\$6,106	\$3,780
India	\$6,937	\$4,794
Malaysia	\$12,786	\$8,592
<b>The Philippines</b>	<b>\$9,666</b>	<b>\$5,470</b>
Singapore	\$34,203	\$21,476
Thailand	\$11,222	\$6,336

\*Information was collected in local currency and converted into US dollars with the following exchange rate: 1 USD : 49.23 PHP

# Human Resources

## Contact Center Manager / Supervisor to Agent Ratio



Country	CC Man / Sup to Agent Ratio
China	1:29
India	1:8
Malaysia	1:5
<b>The Philippines</b>	<b>1:8</b>
Singapore	1:4
Thailand	1:6

On average, in The Philippines, the ratio of Contact Center Manager / Supervisor to Agent is 1:8.

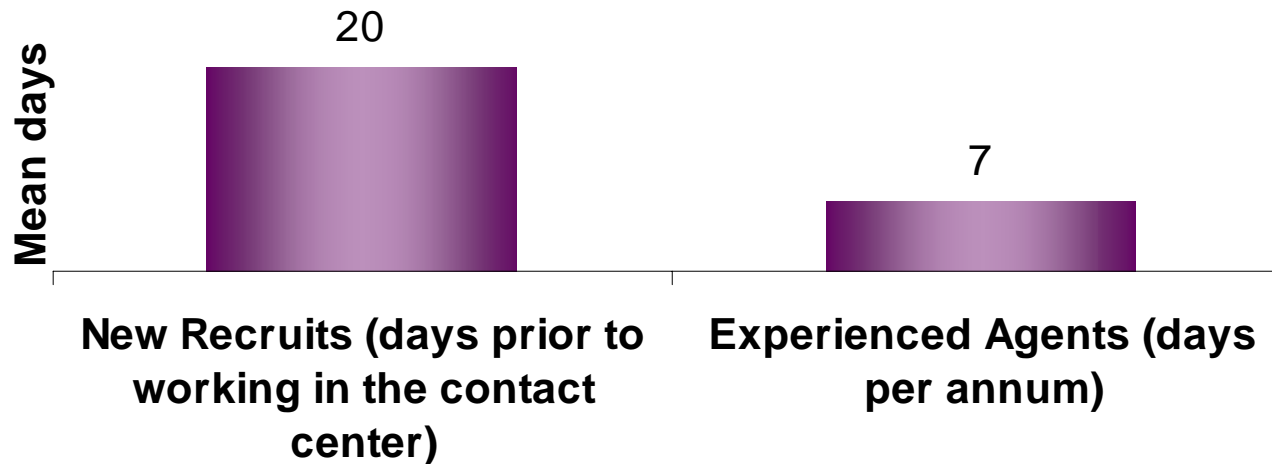
N=67



# Human Resources

N=67

## Mean Agent External / Internal Classroom Training Days



- New recruits in The Philippines receive on average 20 days training before starting work in the contact center.
- Experienced agents receive on average 7 days of external / internal classroom training per year. Experienced agents also receive on average 10 days on the job training per year and 5 days of e-learning training per year.

Country	New Recruits Mean Training Days	Experienced Agents Mean Training Days
China	16	9
India	16	11
Malaysia	9	2
<b>The Philippines</b>	<b>20</b>	<b>7</b>
Singapore	18	7
Thailand	28	5

## Training Days

Training days – new recruits	<20 seats	20-49 seats	50-99 seats	100+ seats
External/internal classroom training	11	12	22	30

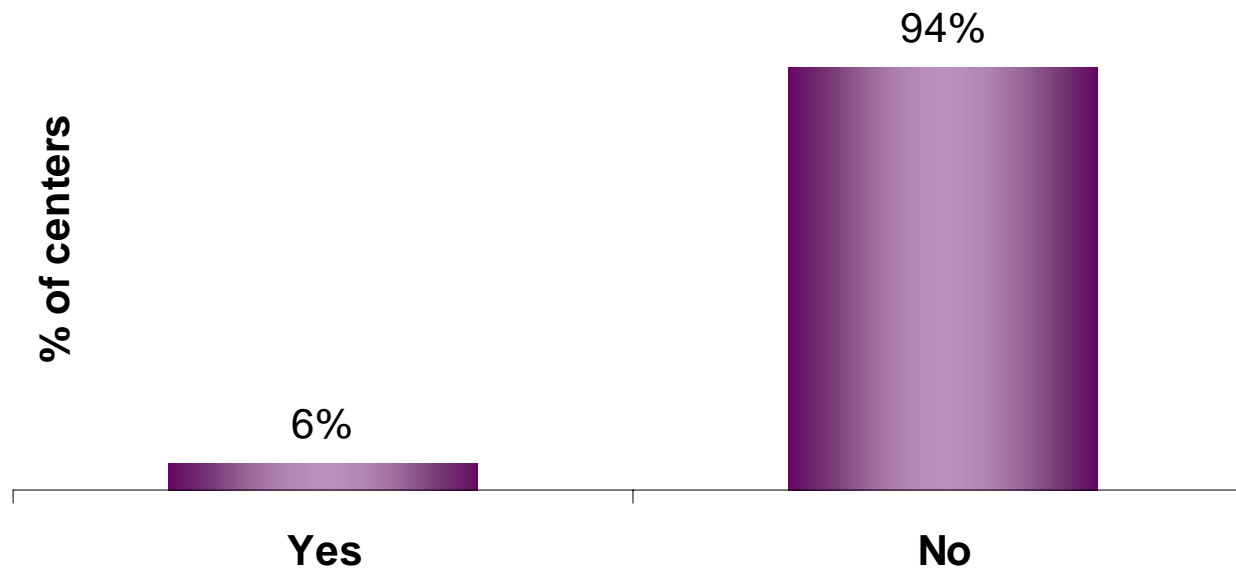
Training days – experienced agents (days per annum)	<20 seats	20-49 seats	50-99 seats	100+ seats
External/internal classroom training	5	2	8	11

Training days – experienced agents (days per annum)	In-house	Outsource
External/internal classroom training	4	15

- New recruits in contact centers with 100+ seats receive a statistically significantly higher number of external/internal classroom training days.
- Experienced agents in contact centers with 100+ seats receive a statistically significantly higher number of external/internal classroom training days.
- Experienced agents in outsourced contact centers receive a statistically significantly higher number of external/internal classroom training days.

# Human Resources

### % of Centers Allowing Telework



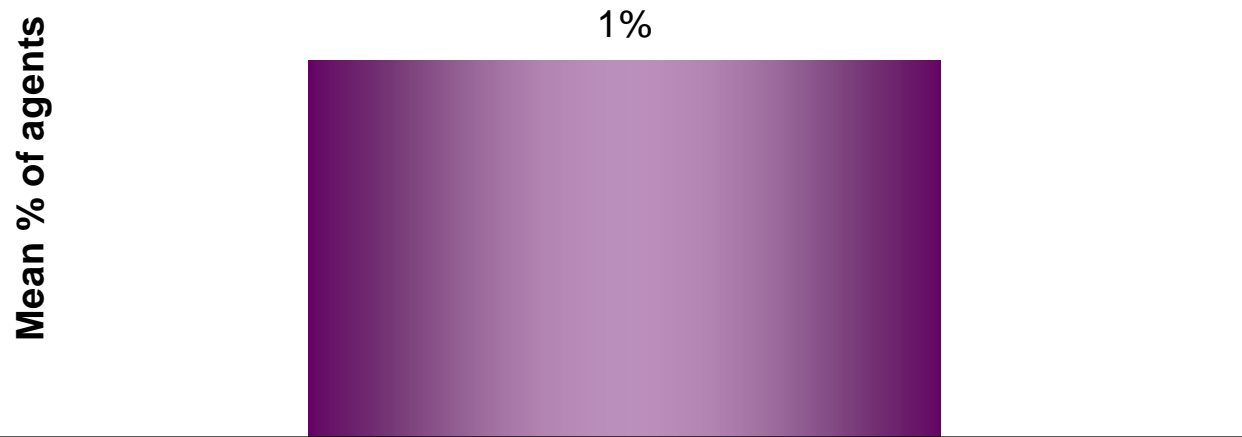
Country	% Centers Allowing Telework
China	-
India	3%
Malaysia	3%
<b>The Philippines</b>	<b>6%</b>
Singapore	7%
Thailand	6%

6% of all contact centers allow their agents to telework.

N=67

# Human Resources

## Proportion of Agents that Telework (Base = only those centers allowing telework)

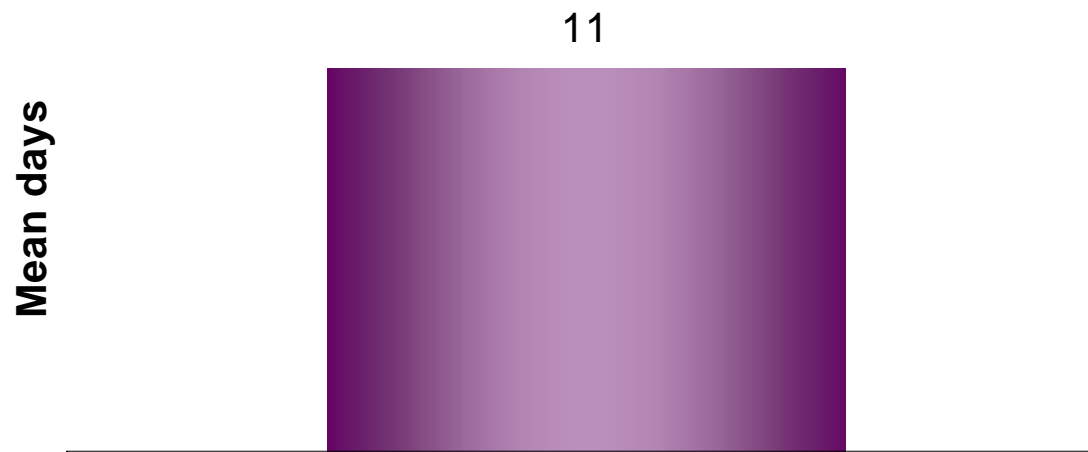


In centers that allow agents to telework, on average, 1% of agents do.

Country	% Agents That Telework
China	-
India	8%
Malaysia	9%
<b>The Philippines</b>	<b>1%</b>
Singapore	5%
Thailand	13%

N=67

## Average Days Taken in Sick Leave (per agent per annum)



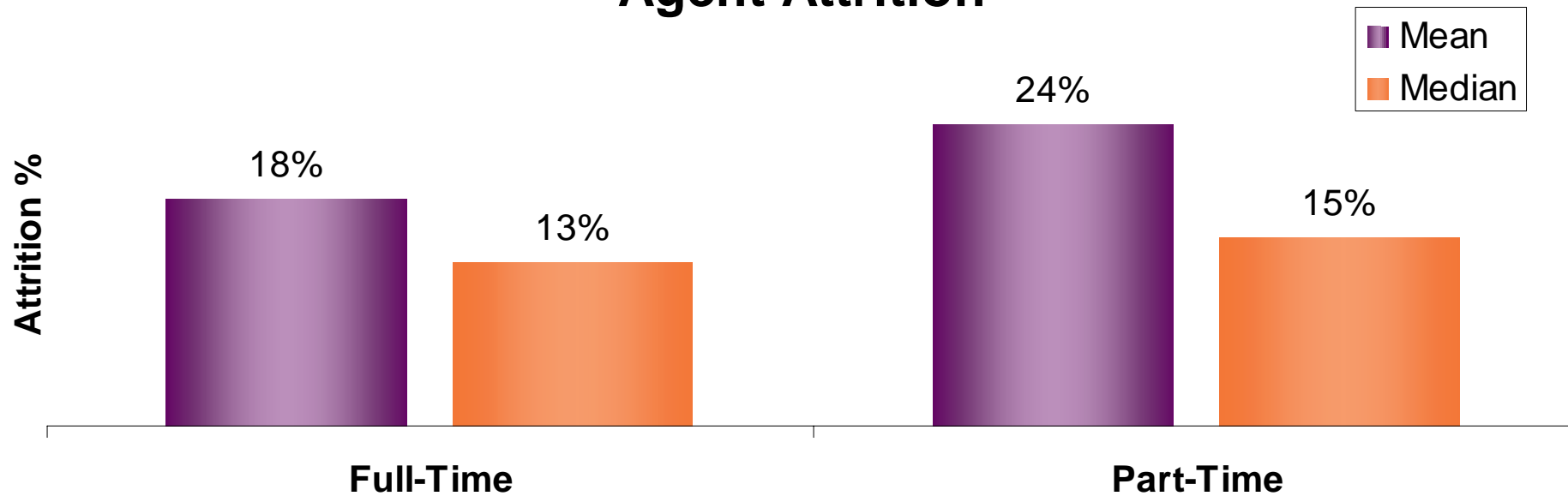
Country	Mean Sick Days
China	11
India	15
Malaysia	8
<b>The Philippines</b>	<b>11</b>
Singapore	8
Thailand	10

On average, in The Philippines each agent takes approximately 11 days of sick leave per annum.

N=67

N=67

## Agent Attrition



Country	Mean Attrition (FT)	Mean Attrition (PT)
China	17%	29%
India	38%	32%
Malaysia	18%	24%
<b>The Philippines</b>	<b>18%</b>	<b>24%</b>
Singapore	16%	21%
Thailand	15%	16%

- In The Philippines, the mean attrition rate of full-time agents is 18%.
- The mean attrition rate of part-time agents is 24%.

## Agent Attrition

Attrition Range	Full-Time Agents	Part-Time Agents
0%	30%	36%
1 - 5%	6%	7%
6 - 10%	9%	7%
11 - 15%	8%	0%
16 - 20%	17%	7%
21 - 50%	27%	29%
51 - 100%	3%	14%

- There is a statistically significantly higher proportion of in-house contact centers with no (0%) full-time and part-time agent attrition.
- There is a statistically significantly higher proportion of contact centers with less than 50 seats with no (0%) full-time and part-time agent attrition.

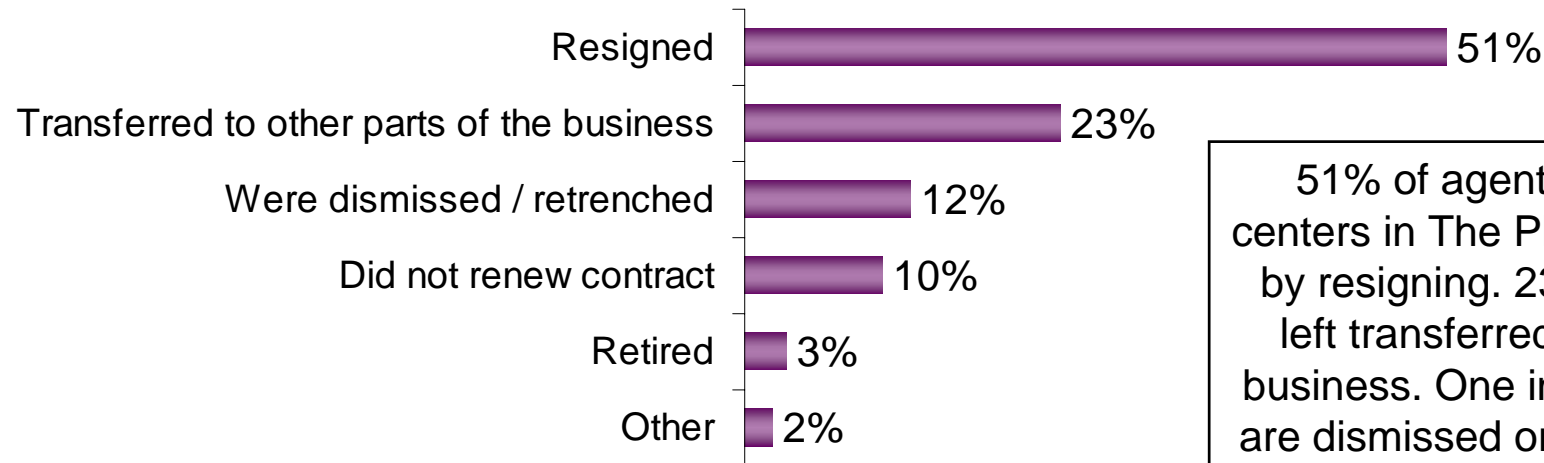
Industry movement of staff	In-house	Outsource
No (0%) full-time agent attrition	40%	5%
No (0%) part-time agent attrition	57%	14%

Industry movement of staff	<20 seats	20-49 seats	50-99 seats	100+ seats
No (0%) full-time agent attrition	29%	55%	20%	15%
No (0%) part-time agent attrition	50%	100%	0%	12%

# Human Resources

N=67

## Type of Agent Attrition



51% of agents who leave contact centers in The Philippines have done so by resigning. 23% of those who have left transferred to other parts of the business. One in ten agents who leave are dismissed or retrenched and one in ten did not renew their contract.

Country	Resigned	Transferred	Dismissed / Retrenched	Did not renew contract	Retired
China	39%	11%	10%	40%	0%
India	62%	12%	14%	11%	1%
Malaysia	72%	10%	4%	11%	3%
<b>The Philippines</b>	<b>51%</b>	<b>23%</b>	<b>12%</b>	<b>10%</b>	<b>3%</b>
Singapore	74%	11%	5%	10%	0%
Thailand	84%	9%	4%	3%	0%



## Type of Agent Attrition

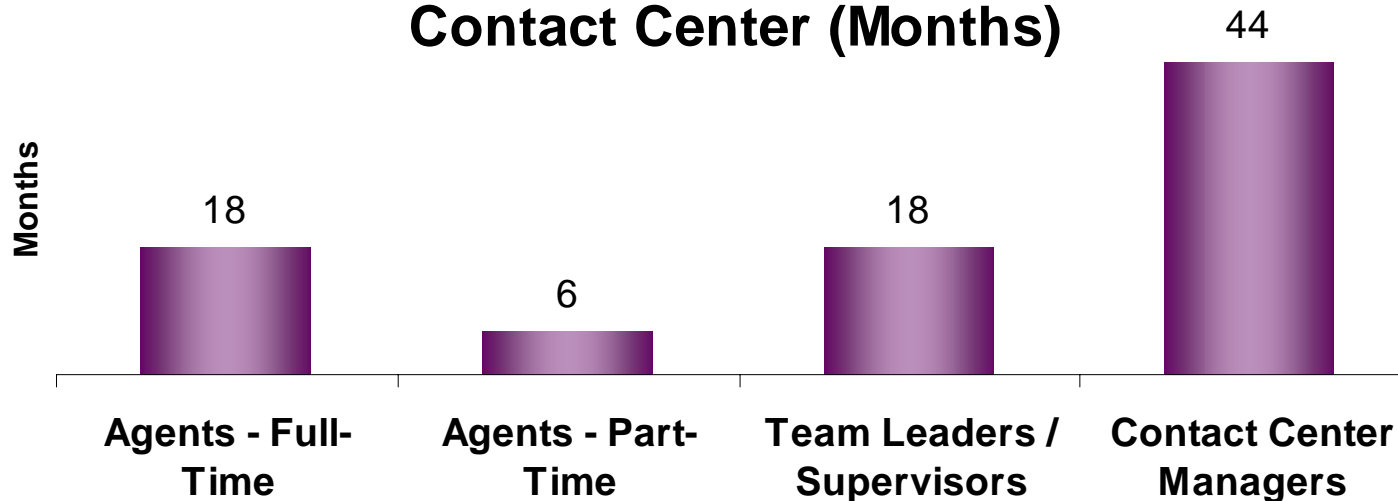
Movement of staff	In-house	Outsource
Agents who resigned	58%	40%
Agents who transferred to other parts of the business	27%	18%
Agents who did not renew contract	4%	18%
Agents who were dismissed/retrenched	8%	18%
Agents who retired	3%	2%
Others	0%	4%

- As a percentage of total attrition, there is a statistically significantly higher proportion of agents in in-house contact centers who resigned and agents who transferred to other parts of the business.
- There is a statistically significantly higher proportion of agents who did not renew their contract in outsourced contact centers.

# Human Resources

N=67

## Average Tenure of Staff who Leave the Contact Center (Months)



The average tenure of those full-time staff leaving contact centers in The Philippines is 18 months, with an average of 6 months for part-time agents. Team leaders stay for around 1.5 years and contact center managers stay longer at just under 4 years

Country	Agents (FT) Months	Agents (PT) Months	TL / Super Months	CC Man Months
China	14	6	23	30
India	11	9	14	18
Malaysia	18	9	24	30
<b>The Philippines</b>	<b>18</b>	<b>6</b>	<b>18</b>	<b>44</b>
Singapore	20	12	28	39
Thailand	15	6	32	37

## Tenure of Staff

Average length of tenure (months)	In-house	Outsource
Full time agents	22	12
Part time agents	6	5
Team Leader/ Supervisors	8	20
Contact Centre Managers	104	19

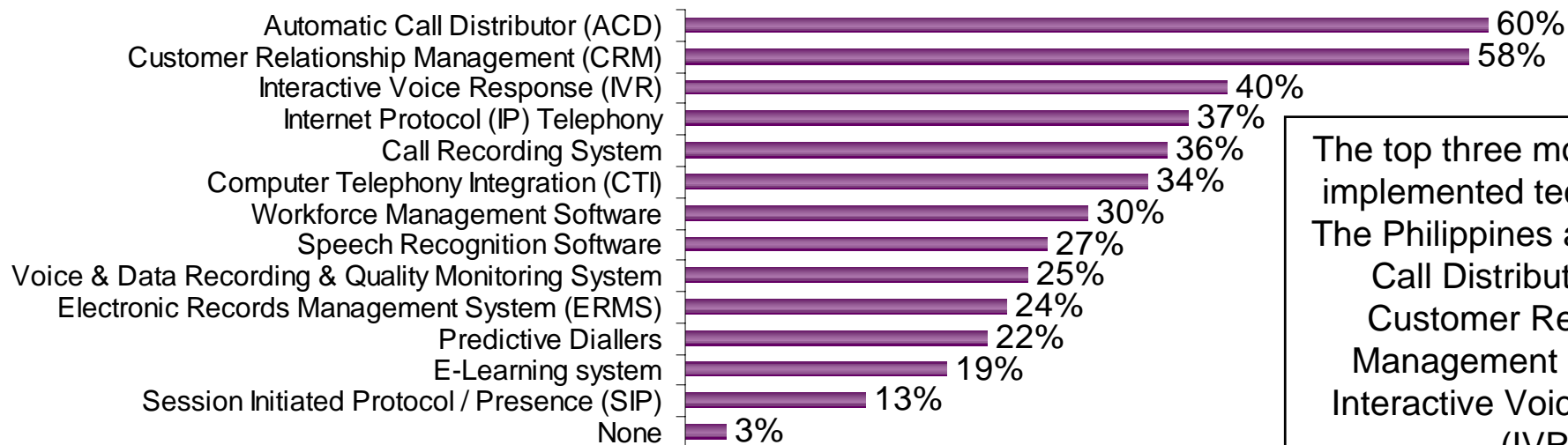
- Full-time agents and contact center managers in in-house contact centers have a statistically significantly longer length of tenure.
- Team leaders / Supervisors in outsourced contact centers have a statistically significantly longer length of tenure.



# Technology

- Technology Implemented
- Technology Purchase

## Technology Implemented



The top three most commonly implemented technologies in The Philippines are Automatic Call Distributor (ACD), Customer Relationship Management (CRM) and Interactive Voice Response (IVR).

Country	Most Implemented	2 <sup>nd</sup> Most Implemented	3 <sup>rd</sup> Most Implemented
China	ACD (71%)	IVR (60%)	Call Recording (50%)
India	ACD (80%)	IVR (59%)	CTI (61%)
Malaysia	ACD (96%)	CRM (72%)	IVR (66%)
<b>The Philippines</b>	<b>ACD (60%)</b>	<b>CRM (58%)</b>	<b>IVR (40%)</b>
Singapore	ACD (78%)	CRM (61%)	IVR (51%)
Thailand	IVR (62%)	ACD (49%)	Call Recording (34%)

N=67

## Technology Implemented

Technology Implemented	<20 seats	20-49 seats	50-99 seats	100+ seats
IVR	21%	25%	20%	64%
IP Telephony	21%	20%	40%	57%
Call recording system	14%	10%	20%	68%
CTI	14%	25%	20%	54%
Workforce Management Software	0%	20%	40%	50%
Speech Recognition Software	0%	20%	40%	43%
Voice & data recording & QMS	0%	0%	0%	61%
ERMS	7%	20%	0%	39%
Predictive Diallers	0%	5%	20%	46%
SIP	0%	5%	0%	29%

The large (100+ seats) contact centers in The Philippines appear to be the innovators of the contact center industry in terms of implementation of technologies.

## Technology Implemented

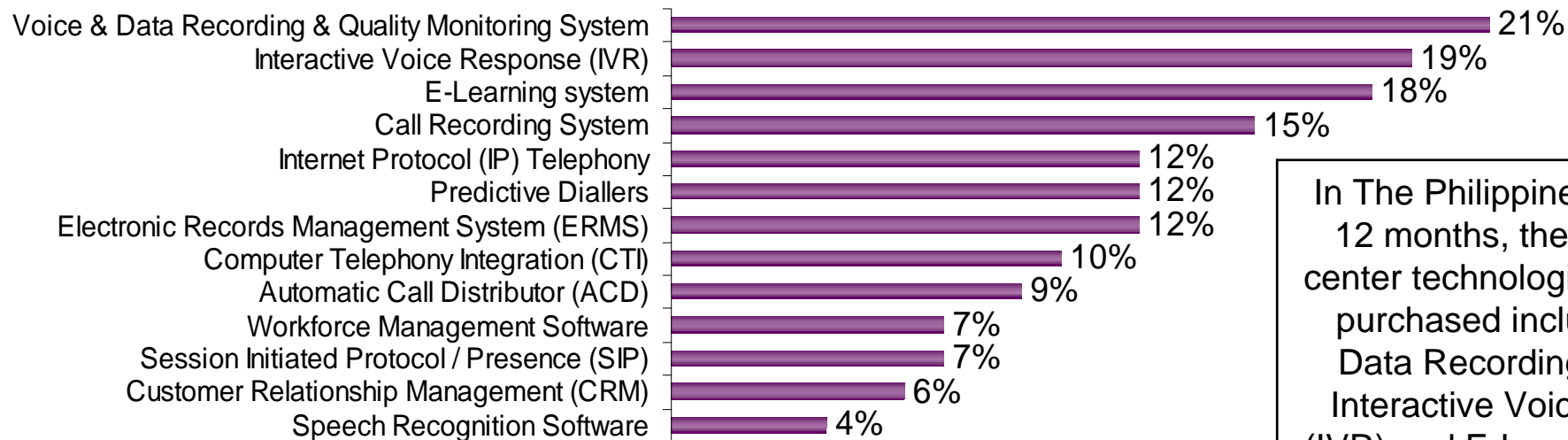
Technology Implemented	In-house	Outsource
ACD	53%	75%
CRM	49%	80%
IVR	26%	75%
IP Telephony	26%	65%
Call recording system	17%	80%
CTI	28%	50%
Workforce Management Software	19%	55%
Speech Recognition Software	19%	45%
Voice & data recording & QMS	4%	75%
ERMS	15%	45%
Predictive Diallers	6%	60%
E-Learning system	11%	40%
SIP	6%	30%

Outsourced contact centers have statistically significantly higher levels of technology adoption.

# Technology

N=67

## Technology Purchase in the Next 12 Months



In The Philippines, in the next 12 months, the key contact center technologies likely to be purchased include Voice & Data Recording and QMS, Interactive Voice Response (IVR) and E-Learning systems.

Country	Key purchase	2 <sup>nd</sup> Key purchase	3 <sup>rd</sup> Key purchase
China	Workforce Management (13%)	IP Telephony (13%)	CRM (12%)
India	Workforce Management (19%)	ERMS (13%)	IP Telephony (12%)
Malaysia	IVR (16%)	Call Recording (14%)	IP & V/D & QMS (13%)
<b>The Philippines</b>	<b>Voice &amp; Data &amp; QMS (21%)</b>	<b>IVR (19%)</b>	<b>E-Learning (18%)</b>
Singapore	CRM (15%)	IP Telephony (14%)	Workforce Management (12%)
Thailand	CTI (20%)	IP Telephony (17%)	CRM & V/D & QMS (12%)



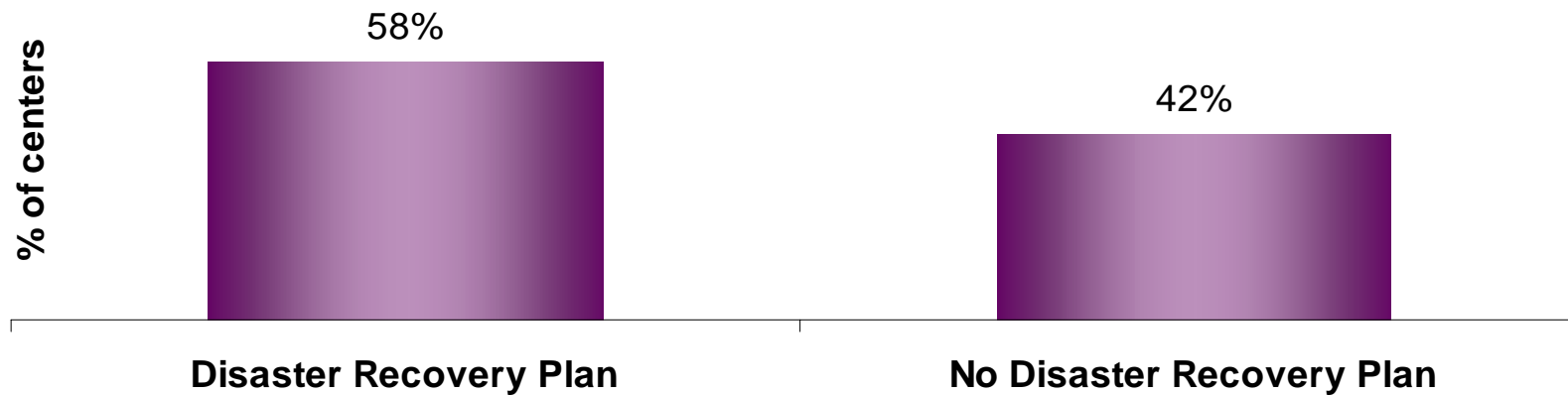


# Disaster Recovery

- Disaster Recovery Planning

# Disaster Recovery

## Percentage of Contact Centers with a Disaster Recovery Plan



Country	Disaster Recovery Plan
China	61%
India	73%
Malaysia	42%
<b>The Philippines</b>	<b>58%</b>
Singapore	86%
Thailand	75%

58% of contact centers currently in The Philippines have a disaster recovery plan in place. 42% do not.

N=67

## Disaster Recovery Plan

Have a disaster recovery plan	<20 seats	20-49 seats	50-99 seats	100+ seats
Yes	33%	57%	20%	81%

Have a disaster recovery plan	In-house	Outsource
Yes	44%	84%

There is a statistically significantly higher proportion of contact centers with 100+ seats and outsourced contact centers with a disaster recovery plan.

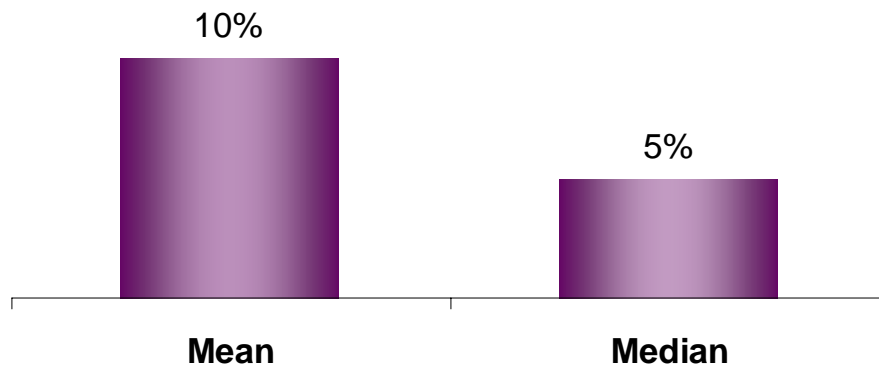


# Key Performance Indicators

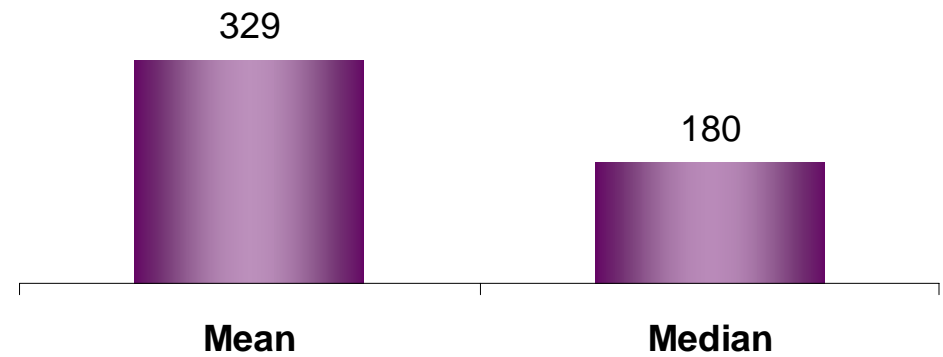
- Key Contact Center Metrics
- Call Quality Measures
- Quality Accreditation

# Key Performance Indicators

### Average Abandonment Rate



### Average Inbound Talk Time (Seconds)



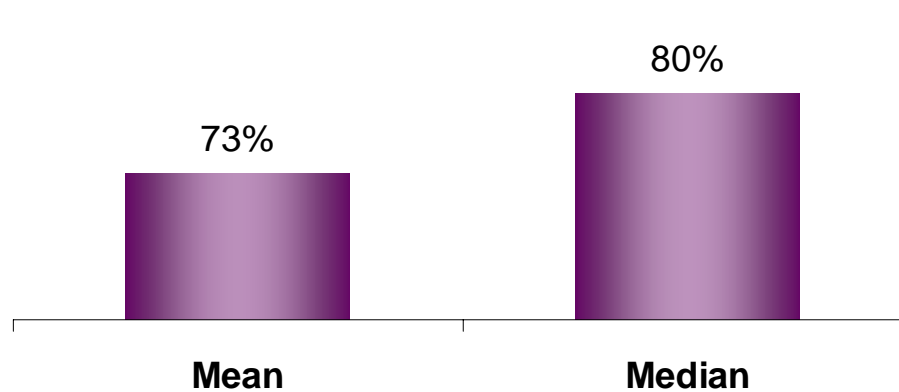
Country	Mean %
China	12%
India	9%
Malaysia	10%
<b>The Philippines</b>	<b>10%</b>
Singapore	6%
Thailand	9%

Country	Mean
China	228
India	298
Malaysia	271
<b>The Philippines</b>	<b>329</b>
Singapore	207
Thailand	231

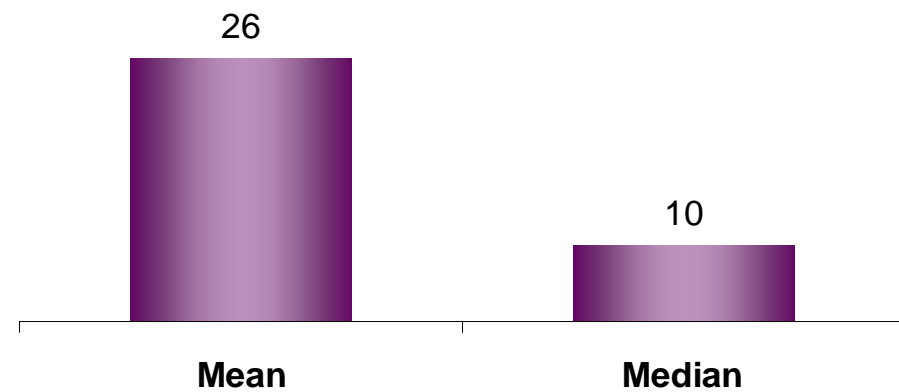
N=67

# Key Performance Indicators

### First Call Resolution



### Average Speed of Answer (Seconds)



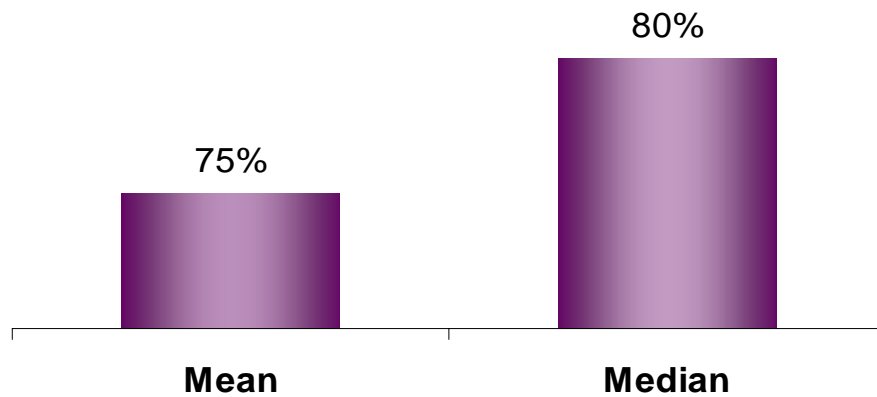
Country	Mean %
China	83%
India	67%
Malaysia	73%
<b>The Philippines</b>	<b>73%</b>
Singapore	82%
Thailand	75%

Country	Mean
China	7
India	31
Malaysia	19
<b>The Philippines</b>	<b>26</b>
Singapore	29
Thailand	12

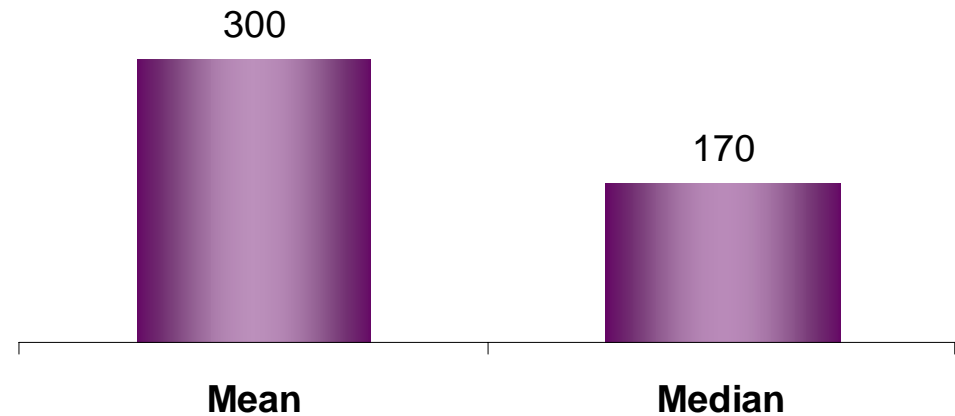
N=67

# Key Performance Indicators

Occupancy Rate



Average Outbound Talk Time (Seconds)



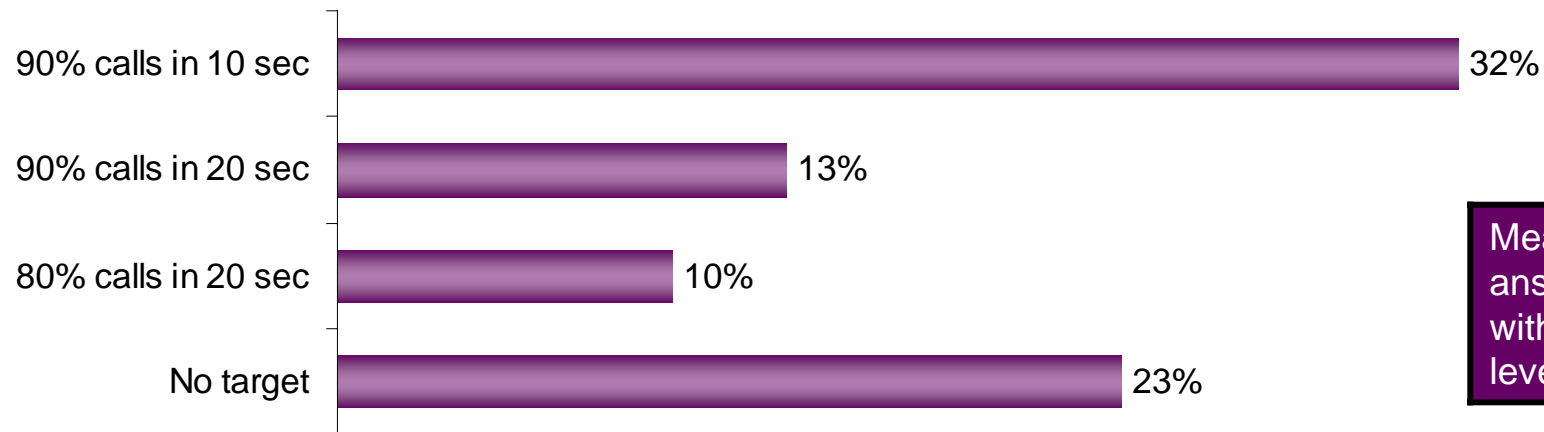
Country	Mean %
China	84%
India	74%
Malaysia	74%
<b>The Philippines</b>	<b>75%</b>
Singapore	74%
Thailand	80%

Country	Mean
China	236
India	226
Malaysia	339
<b>The Philippines</b>	<b>300</b>
Singapore	229
Thailand	295

N=67

# Key Performance Indicators

## Current Service Level Targets



Mean % of calls answered within service level target

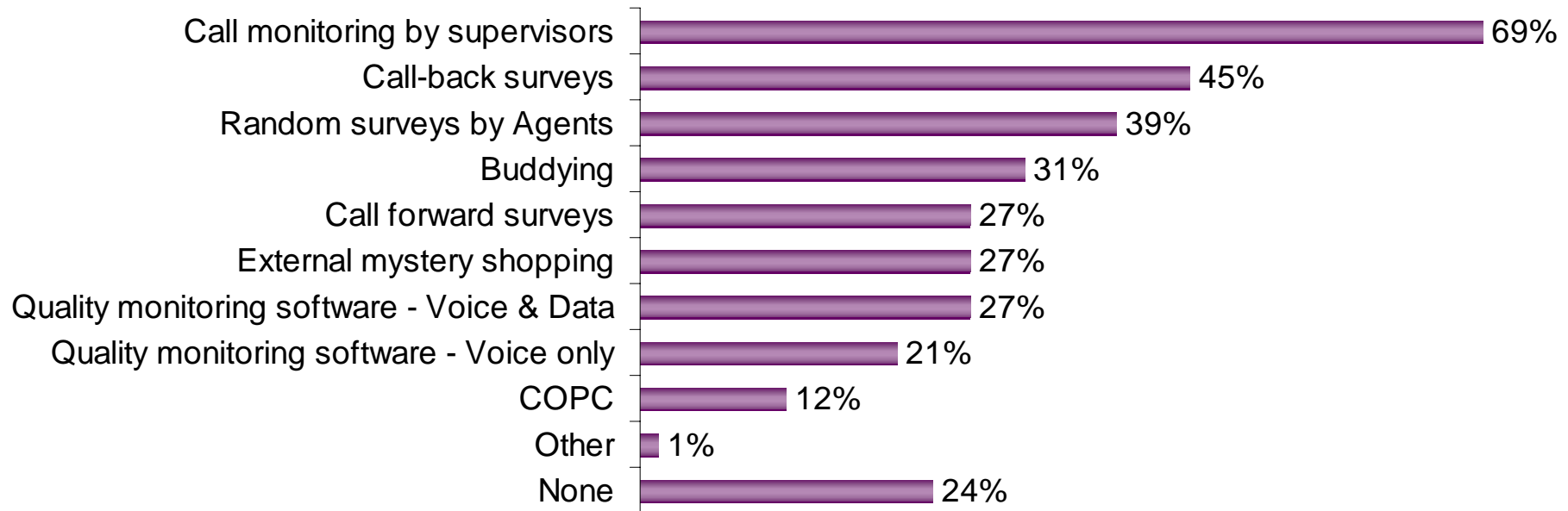
77%

Country	Mean % answered within service target
China	90%
India	83%
Malaysia	80%
<b>The Philippines</b>	<b>77%</b>
Singapore	87%
Thailand	84%

N=67



## Call Quality Measures Used



69% of all contact centers use Call Monitoring by Supervisors. Nearly half of all contact centers use Call-Back Surveys and 40% use Random Surveys by Agents. 24% of contact centers do not use any call quality measures.

N=67

# Key Performance Indicators

Call quality measures used	<20 seats	20-49 seats	50-99 seats	100+ seats
Call monitoring by supervisors	43%	65%	40%	89%
Call-back surveys	21%	40%	20%	64%
Random surveys by Agents	7%	35%	40%	57%
Buddying	21%	10%	20%	54%
Call forward surveys	14%	30%	20%	32%
External mystery shopping	14%	10%	20%	46%
Quality monitoring software - Voice & Data	0%	5%	0%	61%
Quality monitoring software - Voice only	7%	5%	0%	43%
COPC	0%	0%	20%	25%
Others	0%	0%	0%	4%
None	50%	25%	40%	7%

- There is a statistically significantly higher proportion of contact centers with 100+ seats using quality call measures.
- There is a statistically significantly higher proportion of contact centers with less than 100 seats not using any quality call measures.

## Call Quality Measures Used

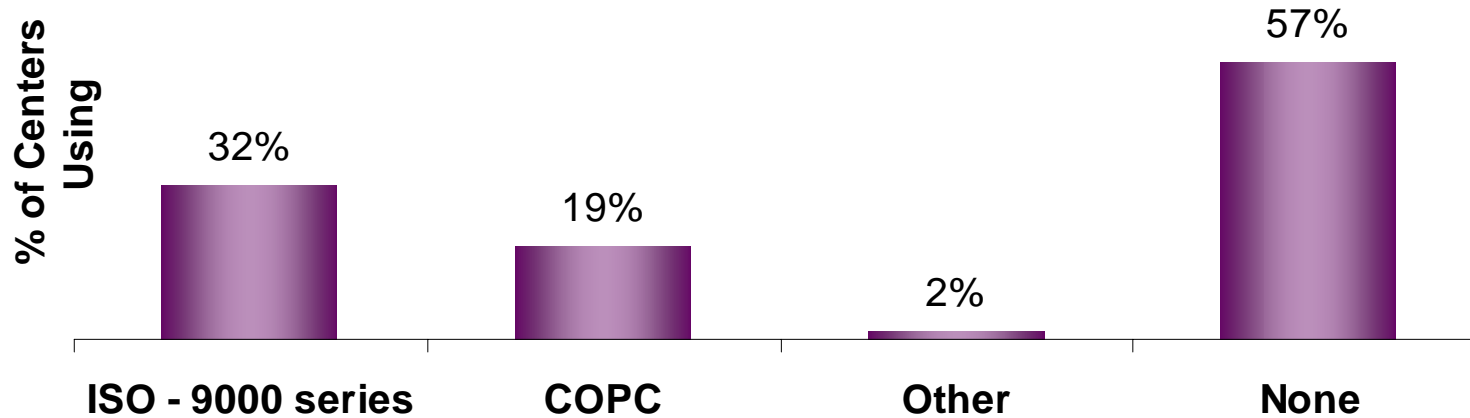
Call quality measures used	In-house	Outsource
Call monitoring by supervisors	60%	90%
Call-back surveys	36%	65%
Random surveys by Agents	32%	55%
Buddying	21%	55%
Call forward surveys	26%	30%
External mystery shopping	17%	50%
Quality monitoring software - Voice & data	6%	75%
Quality monitoring software - Voice only	9%	50%
COPC	6%	25%
Others	0%	5%
None	32%	5%

There is a statistically significantly higher proportion of in-house contact centers not using any quality call measures.

# Key Performance Indicators

N=67

## % of Contact Centers that have Quality Accreditation



32% of contact centers have ISO-9000 quality accreditation, 19% have COPC quality accreditation and 57% of contact centers do not have quality accreditation.

Country	ISO-9000	COPC	None
China	41%	27%	33%
India	27%	43%	34%
Malaysia	8%	5%	87%
<b>The Philippines</b>	<b>32%</b>	<b>19%</b>	<b>57%</b>
Singapore	37%	0%	54%
Thailand	21%	2%	79%



# Outsourcing of Contact Centre Functionality

- Outsourcing Functionality
- Outsourcing Locations
- Future Outsourcing Plans

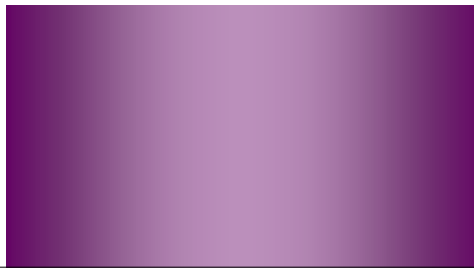
# Outsourcing

N=46

## % of Organisations Currently Outsourcing some of their Contact Center Functionality

22%

% of centers



Country	% Orgs Outsourcing
China	25%
India	10%
Malaysia	7%
<b>The Philippines</b>	<b>22%</b>
Singapore	21%
Thailand	15%

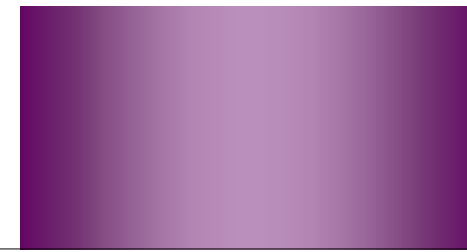
N=10

## Percentage of Contact Center Functionality Currently Outsourced

(Base = only those currently outsourcing)

50%

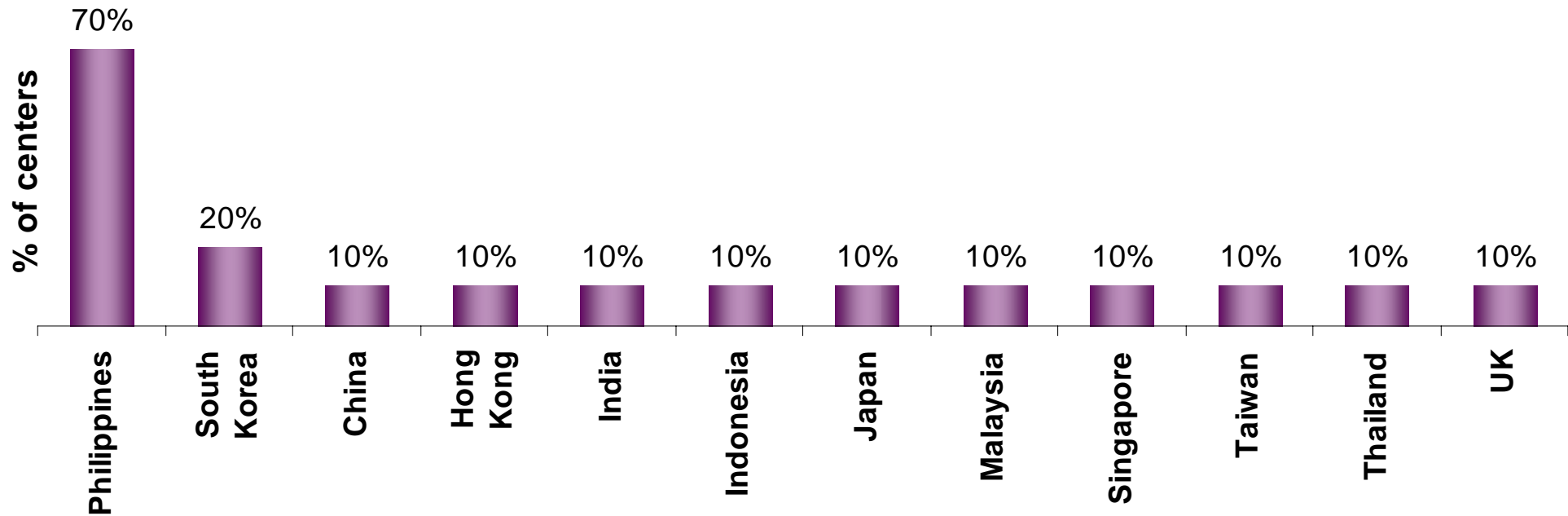
% of functionality outsourced



Country	% CC Functionality
China	19%
India	-
Malaysia	59%
<b>The Philippines</b>	<b>50%</b>
Singapore	47%
Thailand	89%

# Outsourcing

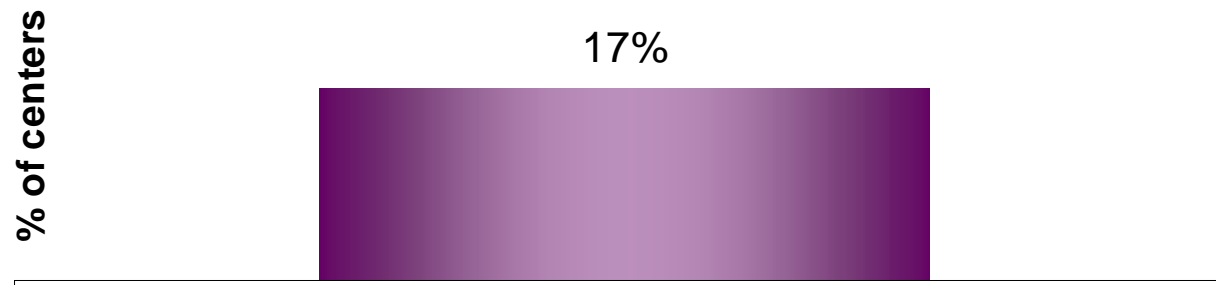
## Current Outsource Locations



Of those contact centers in The Philippines currently outsourcing some of their contact center functionality, 70% of centers currently outsource to The Philippines. A smaller percentage also outsource to a number of other countries.

N=10

## Organisations Planning to Outsource Any / Any Additional Contact Center Functionality in Next 12 Months



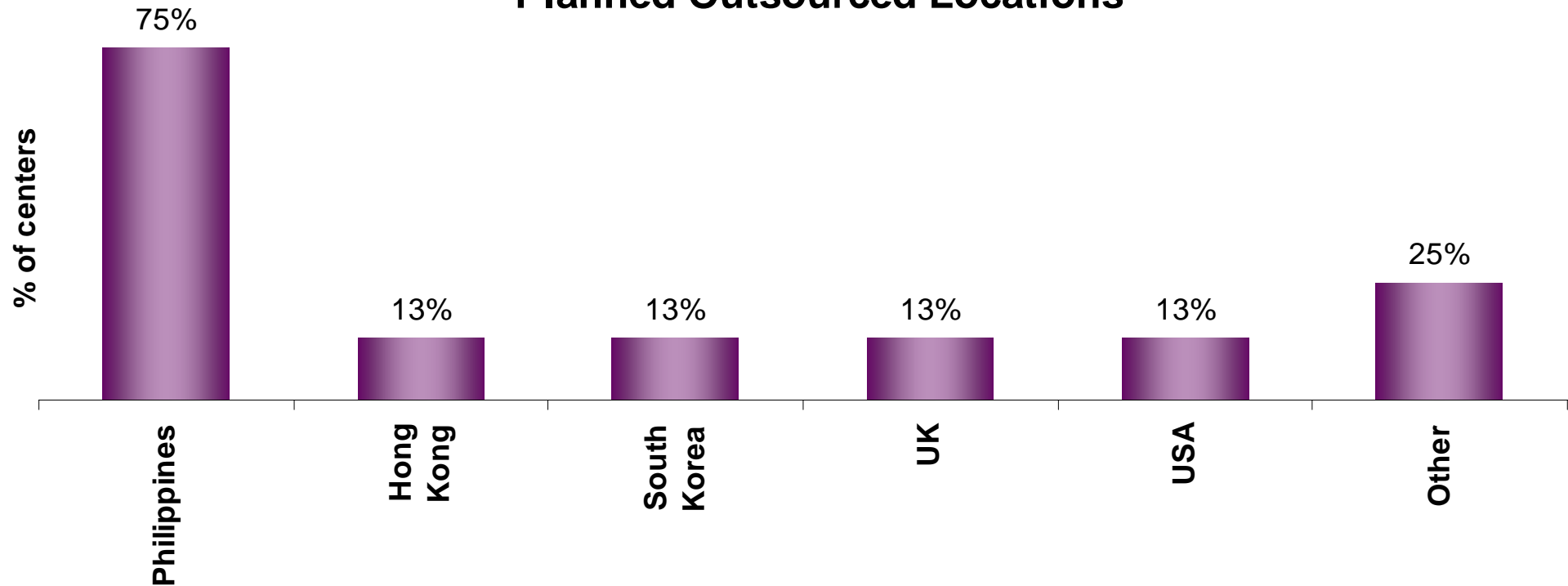
Country	% Orgs Outsourcing
China	7%
India	6%
Malaysia	14%
<b>The Philippines</b>	<b>17%</b>
Singapore	8%
Thailand	15%

17% of contact centers in The Philippines plan to outsource some contact center functionality within the next 12 months.

N=46



## Planned Outsourced Locations



Of those contact centers planning to outsource some contact center functionality in the next 12 months, 75% plan to outsource to The Philippines. A smaller percentage also plan to outsource to a number of other countries.

N=8

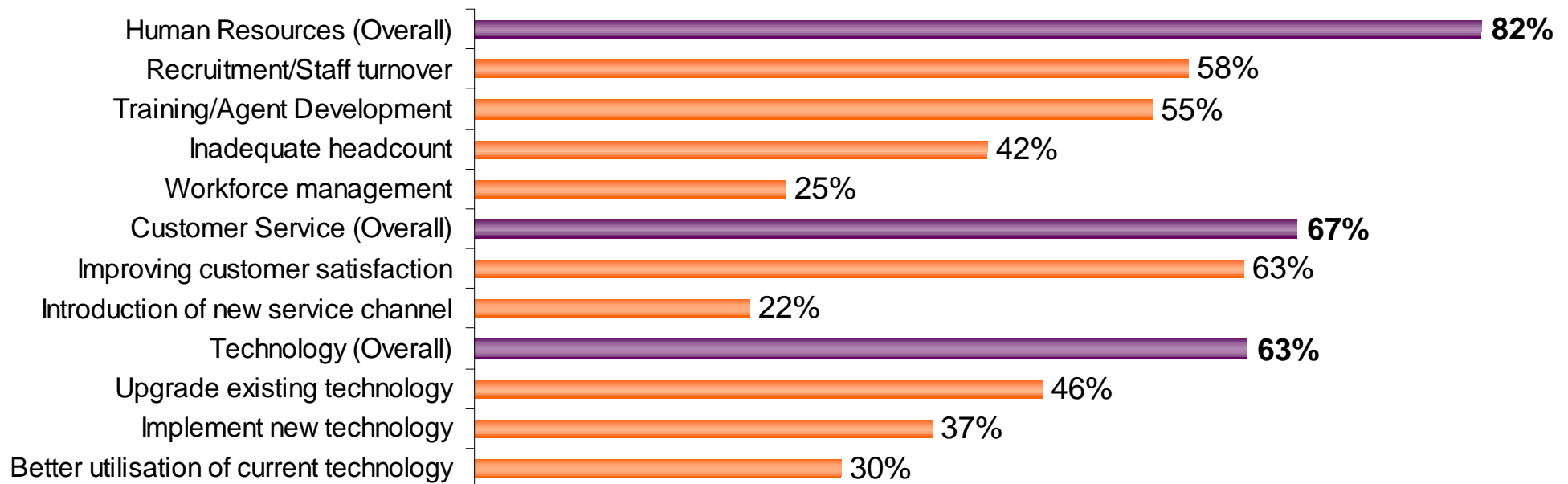


# Management Challenges

- Key Management Challenges in the Next 12 months

# Management Challenges

## Significant Challenges Facing Contact Centers in the Next 12 Months

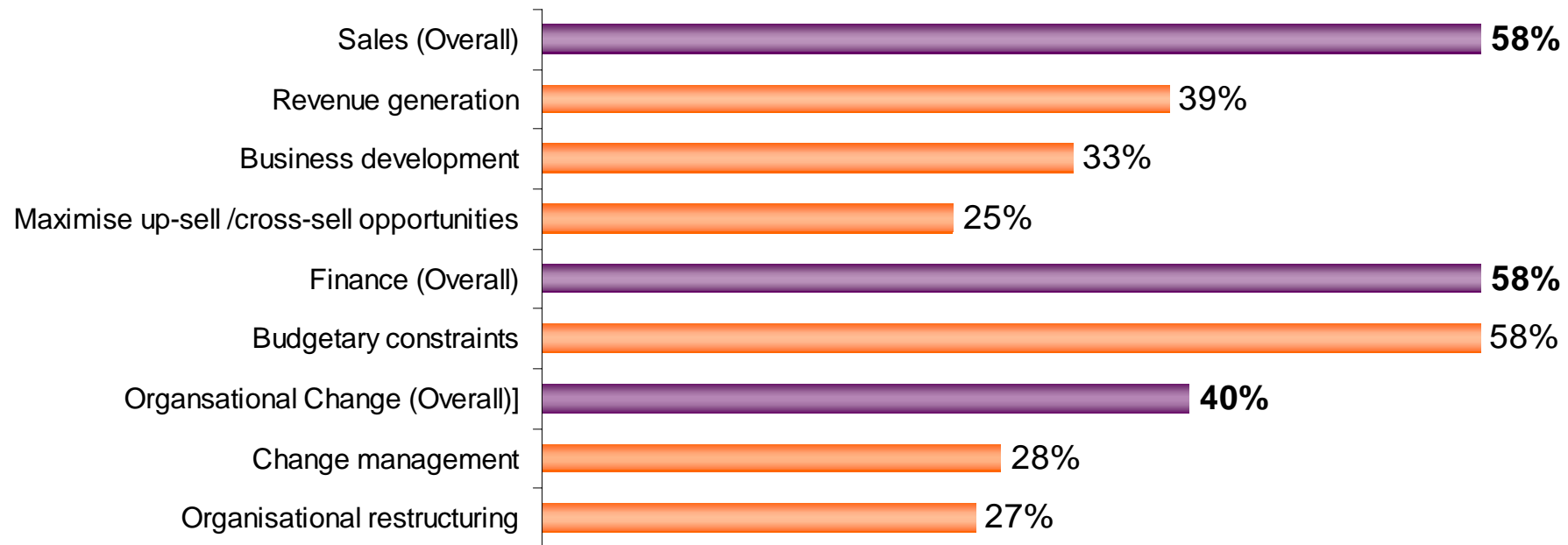


Respondents in The Philippines believe that the top three major challenges facing contact centers over the next 12 months are Human Resource Management, Customer Service and Technology.

N=67

# Management Challenges

## Significant Challenges Facing Contact Centers in the Next 12 Months (continued)



N=67

## Significant Challenges

Country	1 <sup>st</sup> Challenge	2 <sup>nd</sup> Challenge	3 <sup>rd</sup> Challenge
China	Human Resources	Customer Service	Technology
India	Human Resources	Technology	Sales
Malaysia	Human Resources	Sales	Customer Service
<b>The Philippines</b>	<b>Human Resources</b>	<b>Customer Service</b>	<b>Technology</b>
Singapore	Human Resources	Customer Service	Technology
Thailand	Technology	Customer Service	Human Resources

Established in 1999 and based in Sydney with a regional office in Singapore, callcentres.net is the central portal for the Asia Pacific contact center industry providing research, benchmarking studies and up-to-date news and information. We deliver tailored industry content through our newsletters: contact news asia and contact news (Australia and New Zealand).

callcentres.net is recognised as the leading provider of research and information to the Asia Pacific contact center industry.

## For more information please contact:

**Dr Catriona Wallace**  
**Director**  
**callcentres.net**  
**Tel: +61 2 9927 3333**  
**Email: [cwallace@callcentres.net](mailto:cwallace@callcentres.net)**

**Level 4, 121 Walker Street**  
**North Sydney NSW 2060**