

INSIDE THE CANADIAN CALL CENTRE MARKET

Canadian call centers and agent positions (000s), 2003 - 2008

	2003	2004	2005	2006	2007	2008	CAGR
Call centers	4.5	4.75	4.95	5.1	5.2	5.3	3.3%
APs	212.3	230.0	248.2	266.8	285.4	305.5	7.6%
Avg. size (APs/CC)	47.2	48.4	50.1	52.3	54.9	57.6	

Canadian multichannel call centers (000s), 2003 - 2008

	2003	2004	2005	2006	2007	2008	CAGR
Multichannel call centers	0.4	0.5	0.6	0.7	0.8	1.0	21.5%
proportion of all call centers	8%	10%	12%	14%	16%	18%	

Regional distribution of Canadian APs (000s), 2003 - 2008

	2003	% total	2008	% total	CAGR
B.C. and Prairies	56.1	26.4%	82.5	27.0%	8.0%
Ontario/Quebec	141.9	66.8%	201.3	65.9%	7.2%
Atlantic	14.0	6.6%	21.4	7.0%	8.9%
Territories	0.3	0.1%	0.3	0.1%	0.4%
Total	212.3	100%	305.5	100%	7.6%

Canadian APs by sizeband (000s), 2003 - 2008

	2003	% total	2008	% total	CAGR
11 - 30 APs	41.4	19.5%	61.1	20.0%	8.1%
31 - 100 APs	61.6	29.0%	90.1	29.5%	7.9%
101 - 250 APs	57.3	27.0%	84.0	27.5%	7.9%
251+ APs	52.8	24.9%	70.3	23.0%	5.9%
Total	212.3	100%	305.5	100%	7.6%

Canadian call centers by sizeband (000s), 2003 - 2008

	2003	% total	2008	% total	CAGR
11 - 30 APs	2,610	58%	3,021	57%	3.0%
31 - 100 APs	1,350	30%	1,537	29%	2.6%
101 - 250 APs	360	8%	477	9%	5.8%
251+ APs	180	4%	265	5%	8.0%
Total	4,500	100%	5,300	100%	3.3%

Canadian vertical market distribution (000s), 2003 & 2008

	2003	% total	2008	% total	CAGR
Communications	28.4	13.4%	38.2	12.5%	6.1%
Education	0.8	0.4%	1.5	0.5%	12.5%
Entertainment	5.3	2.5%	6.1	2.0%	2.9%
Financial Services	34.0	16.0%	46.1	15.1%	6.3%
Insurance	8.5	4.0%	10.7	3.5%	4.7%
Investment & Securities	5.3	2.5%	9.5	3.1%	12.3%
Retail Banking	20.2	9.5%	26.0	8.5%	5.2%
Government	13.4	6.3%	24.4	8.0%	12.8%
Healthcare/Pharmaceuticals	4.2	2.0%	7.0	2.3%	10.6%
Manufacturing	11.0	5.2%	15.9	5.2%	7.6%
Outsourcing	25.9	12.2%	44.9	14.7%	11.6%
Retail	29.7	14.0%	38.2	12.5%	5.1%
Technology	26.5	12.5%	35.1	11.5%	5.8%
Transport/Logistics	4.2	2.0%	4.6	1.5%	1.5%
Travel and Tourism	7.6	3.6%	12.2	4.0%	9.8%
Utilities	12.5	5.9%	19.9	6.5%	9.7%
Other	8.5	4.0%	11.3	3.7%	5.9%
Total	212.3	100.0%	305.5	100.0%	7.6%

Source: Datamonitor