



# Worldwide Cloud-Based Contact Center Infrastructure Market Share Report

June 2022

DMG Consulting's 2022 Worldwide Cloud-Based Contact Center Infrastructure Market Share Report is the primary resource for vendors, investors and other members of the financial community who want to understand this sector's competitive landscape, market share by revenue and seats, geographical breakdown, adoption rate, and current and projected total addressable market (TAM).

This is DMG Consulting's second annual *Worldwide Cloud-Based Contact Center Infrastructure Market Share Report*. This insightful and unparalleled analysis is based on DMG Consulting's extensive coverage and rigorous analysis of the cloud-based contact center infrastructure (CBCCI) (also known as contact center-as-a-service (CCaaS)) sector.

## Leading & Contending CBCCI Competitors Analyzed in Report

NICE CXone

Genesys

Amazon Connect

Cisco

Twilio

Five9

RingCentral

Avaya

Content Guru

8x8

Odigo

TTEC

Enghouse

Vonage

Puzzel

Alvaria

Verizon

UJET

Bright Pattern

ATT

Lifesize

Salesforce

Other (estimated 178)

## KEY TAKEAWAYS:

- **The CBCCI/CCaaS Sector will Continue to Expand Rapidly:** DMG has mapped out 5- and 10-year growth analyses that project a massive total addressable market (TAM) for this sector.
- **Cloud infrastructure is ideally suited for all work environments:** on-site, work-at-home (WAH) and hybrid. Public cloud infrastructure is robust and reliable, incorporating expanded geographic availability, fast network speed, and improved security and reliability.
- **Reliability and Security are Key to Adoption:** The enhanced reliability and security of the CBCCI/CCaaS sector is driving migration of large contact centers, including financial services, to the cloud.
- **Digital Customer Service is Fueling Growth:** Omni-channel and digital-only seats (which include self-service) will dominate the sector, replacing the surprisingly large number of voice-only seats still in the market.



## CBCCI Vendor Performance

This Report provides a detailed analysis of the performance of the CBCCI competitors in calendar year 2021. The Report analyzes the seat and revenue activity of 22 leading and contending CBCCI competitors.

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*Was 2021 an anomaly for the cloud-based contact center infrastructure market, or will this IT sector sustain its high rate of growth in the next 5 – 10 years?*

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## Driving Forces and Market Inhibitors

The Report provides in-depth analysis of the market trends in the rapidly transforming and dynamic cloud-based contact center infrastructure sector. Flexibility and adaptability are helping to fuel waves of innovation throughout the contact center software market. The vendors no longer feel compelled to stay in their traditional software lanes and are expanding into new territory, broadening the capabilities of their solutions and their TAM.

### Cloud-Based Contact Center Infrastructure Includes:

- Contact center-as-a-service (CCaaS)
- Hosted
- Software-as-a-service (SaaS)

## Trends & Challenges

- **Massive Innovation:** Cloud-based contact center infrastructure vendors are delivering practical innovations, empowered by artificial intelligence, automation and analytics, which is attracting new buyers.
- **Expanding Solutions and Platforms:** CBCCI/CCaaS vendors are building and delivering applications like workforce management (WFM), interaction analytics (IA) and quality management (QM), which were essentially owned by workforce optimization (WFO)/workforce engagement management (WEM) providers since the advent of contact centers.
- **New Generation/New Rules:** The traditional rules of engagement for contact center software have been overthrown, bringing a fresh perspective to what these solutions can and should do for enterprises.
- **The Fight for Market Dominance:** 200 competitors, including contact center infrastructure (ACD/dialer), customer relationship management (CRM) and large technology vendors, are vying for dominance in this dynamic and massive market.
- **Intelligent Self-Service and Digital Support Alter the Landscape:** Customers' preference for helping themselves in digital channels is fueling growth of the CBCCI market.

## Methodology and Modeling

DMG Consulting employs a structured and rigorous research methodology for all of its industry research and reports. DMG has built discrete seat and revenue models for each of the named CBCCI vendors listed in this Report. We offer to share our models and solicit feedback from all named vendors. The models and all analysis are based on corporate filings, vendor guidance, DMG estimates, and/or other market sources.



## What is Included

This Report captures and analyzes the activity of the vendors who sell cloud-based contact center infrastructure solutions, and their recurring license revenue and associated professional services (implementation, integration, training, premium support) and carrier services. It takes into account the 200 estimated competitors in the worldwide CBCCI market that sell a multi-tenant CBCCI offering (referred to as CCaaS), a solution that is hosted in a client, vendor or third-party data center, or a single-tenant SaaS-based offering.

### The CBCCI Market Share Report is for analysts, vendors and companies that need to know:

- 5-year worldwide projections for total contact center market (cloud and premise-based seats)
- Competitive landscape
- Market drivers and inhibitors
- The role of large technology vendors in the CBCCI market
- Market size and TAM
- 5-year worldwide seat projections
- Seats and market share, by vendor
- Revenue and market share, by vendor
- Revenue and market share, by geography
- 2020 and 2021 seat and revenue comparisons, by vendor
- Actual and projected adoption rate
- What's next for the market



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