



## Contact Center as a Service Worldwide Market Share Report

This is DMG's third annual edition of the *Contact Center as a Service Worldwide Market Share Report*, formerly the *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 contact center as a service (CCaaS) sector for the past 15 years.

The future of contact center technology is in the cloud. CCaaS vendors are leading the way, delivering innovation driven by the needs of highly demanding enterprise clients striving to deliver a cost-effective and exceptional customer experience (CX) at scale.

## KEY TAKEAWAYS

- **The CCaaS Sector Will Continue to Expand Rapidly:** DMG has mapped out the 5-year growth and projects a massive TAM for this sector.
- **Integration and Interoperability Are Driving Open Platforms:** Leading CCaaS solutions are transforming into open platforms that facilitate integration and interoperability with many types of third-party and proprietary solutions.
- **CCaaS Solutions Are Expanding with Workforce Engagement Management (WEM):** This includes applications for recording, quality management (QM)/analytics-enabled QM (AQM), workforce management (WFM), and interaction (speech and text) analytics.
- **Economic Challenges Will Drive Market Consolidation:** Reduced access to investment dollars will force mergers and acquisitions (M&A) activity in the CCaaS market.
- **Legacy Provider Transformations Are Driving CCaaS Adoption:** Avaya's bankruptcy and Genesys's announced plan to transition from their premise-based contact center portfolio are speeding up companies' migration to the cloud.

## Leading and Contending CCaaS Competitors Analyzed in Report:

8x8  
Alvaria  
Amazon Connect  
Avaya  
Bright Pattern  
Cisco  
Content Guru  
Enghouse  
Five9  
Genesys  
LiveVox  
NEC  
NICE CXone  
Odigo  
Puzzel  
RingCentral  
Salesforce  
Telia ACE  
Twilio  
UJET  
Vonage  
Other (Estimated 179)



# CCaaS Vendor Performance

This Report provides a detailed analysis of the seat and revenue activity of 21 leading and contending CCaaS competitors and delivers comprehensive insights into the market's performance in calendar year 2022.

*The CCaaS market remains one of the fastest-growing sectors in the contact center technology market, a trend that DMG expects to continue for the next few years.*

## Trends & Challenges

- **Reliability and Security Are Driving Replacements:** A significant number of enterprises are transitioning from one CCaaS vendor to another as they search for more reliable, secure, and feature-rich offerings.
- **AI Adds Value:** Adding AI, including generative AI, to CCaaS solutions enables previously unimaginable practical innovation that significantly benefits customers, employees, and enterprises. AI-enabled solutions such as intelligent virtual agents (IVAs), virtual assistants (VAs), real-time guidance, and more are opening the world of service to transformative new approaches and improved service experiences.
- **Partners Play a Greater Role:** As of the end of calendar year 2022, DMG estimates more than half of CCaaS revenue is coming from partners, a trend that is going to continue.
- **Intelligent Self-Service and Digital Support Are Here to Stay:** The fastest-growing CCaaS seat segments are omnichannel and digital. DMG estimates that more than half of today's seats are voice-centric, but the rapid demand for digital support is going to change this during the next five years.
- **Changing Competitive Landscape:** Some noteworthy technology companies, including Amazon, Google, Microsoft, Salesforce, Zendesk, and Zoom, have broken into the CCaaS market and are starting to win customers.

## Driving Forces and Market Inhibitors

The Report provides a discerning review of the trends impacting the rapidly growing and dynamic CCaaS market. An influential driver of this sector's momentum is the expanding footprint of these platforms, which increasingly include WEM applications and self-service capabilities. Seat adoption is being fueled by many first-time customers realizing the potential of these innovative solutions. This includes some of the larger on-premise contact centers that have finally begun their migration to the cloud.



## 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 CCaaS 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.

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

- 5-year worldwide projections for total contact center market seats
- Competitive landscape
- Market drivers and inhibitors
- Role of large technology vendors in the CCaaS market
- Market size and TAM
- 5-year worldwide CCaaS seat projections
- Seats and market share by vendor
- Revenue and market share by vendor
- Revenue and market share by geography
- 2021 and 2022 seat and revenue comparisons by vendor
- Actual and projected adoption rate
- What's next for the market

## What is Included:

This Report includes information from an estimated 200 worldwide competitors that sell a multi-tenant CCaaS solution that is hosted in a client, vendor, or third-party data center, or a single-tenant SaaS-based offering. It captures and analyzes the activity and revenue including:

- **Recurring revenue** - fees for software and supporting infrastructure usage
- **Professional services** - implementation, integration, training, and premium support
- **Carrier services** - network usage costs



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