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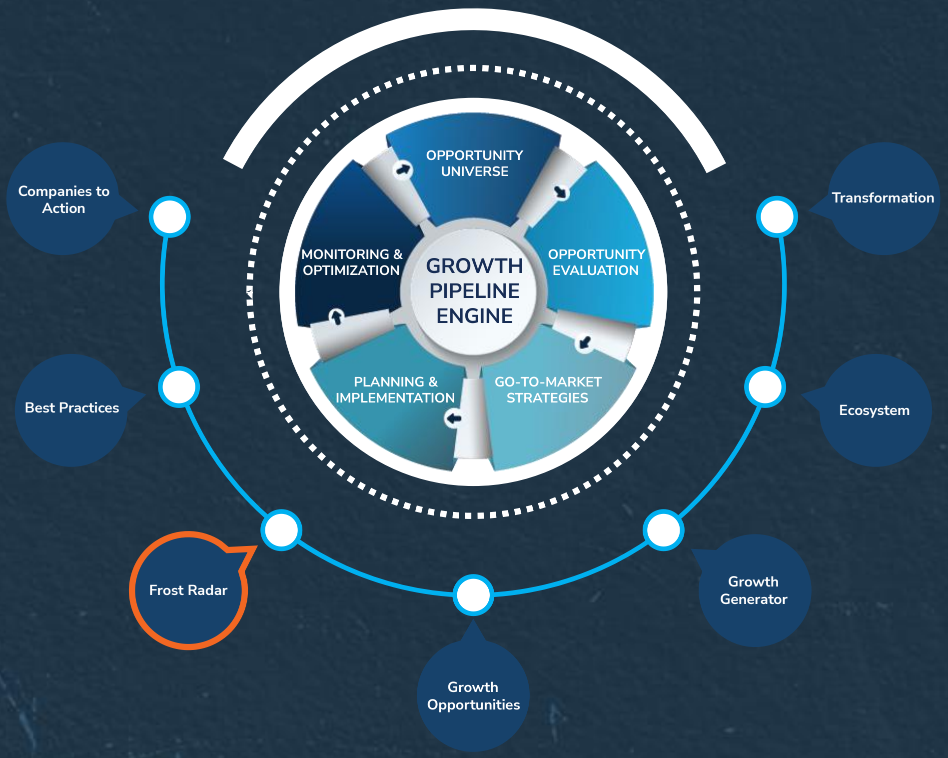
# Frost Radar™: Customer Experience Management Services in Asia-Pacific, 2026

## A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

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# Strategic Imperative and Growth Environment

# Strategic Imperative

- The customer experience (CX) landscape is evolving rapidly, driven by technological advances and rising customer expectations. CX is quickly shifting from an operational function to a core lever of competitive differentiation, placing more pressure on enterprise leaders. Organizations are expected to deliver personalized, proactive, and consistent experiences across the customer journey.
- Frost & Sullivan's latest IT decision-makers survey results indicated that 69% of organizations globally are prioritizing enhancing CX in 2026, while 61% are looking to optimize operational efficiency and productivity. CX management services have become the foundation for delivering connected experiences across all customer touchpoints and throughout each interaction journey, from onboarding to post-purchase support.
- Agentic AI has permeated CX conversation and crossed the production threshold. It is poised to be the most significant structural shift in CX management service delivery in a decade. The competitive frontier is quickly shifting from AI exploration to agentic AI maturity—the demonstrated capacity to deploy, govern, and continuously improve autonomous delivery frameworks at enterprise scale.
- AI is fundamentally transforming the Asia-Pacific (APAC) region's role as the world's largest offshore CX delivery hub. The capacity-based economics underpinning regional delivery hub models are being challenged as AI-driven task substitution reduces the volume of human-executed interactions . Providers that do not reinvest efficiency gains into AI infrastructure and workforce capability upgrades will find labor arbitrage is no longer a defensible competitive position.
- The commercial basis of CX outsourcing is replacing headcount-linked contracts with outcome-linked models demanding measurable performance accountability. Global clients are extending same expectations into offshore contracts covering productivity guarantees, AI-linked service-level agreements, and outcome commitments.

# Strategic Imperative (continued)

- Generic offerings are losing procurement relevance across APAC enterprise demand and global offshore program contracts. Clients in banking, financial services, and insurance (BFSI), healthcare, eCommerce, and government require domain-encoded AI systems that embed vertical-specific process knowledge and regulatory compliance frameworks. Providers with proprietary vertical AI depth are extracting pricing premiums and longer contract durations that horizontal platform investments cannot replicate.
- APAC's regulatory landscape is diverging across jurisdictions on two axes simultaneously. Locally, India's Digital Personal Data Protection (DPDP) Act, Australia's Privacy Act reform, Singapore's Model AI Governance Framework, and Japan’s amended Personal Information Protection Act (PIPA) impose non-uniform data handling obligations. Beyond that, North American and European clients mandate HIPAA, GDPR, and SOC 2 requirements directly into APAC offshore delivery contracts. Providers must satisfy both to remain in consideration.
- Responsible AI governance, transparent model behavior, bias monitoring, data security, and ethical deployment practices have crossed from marketing language to contractual obligation across regulated verticals globally. Providers that operationalize these practices across client-facing propositions and APAC delivery operations will sustain credibility and procurement eligibility. Those that do not will face disqualification in the markets that matter most.
- APAC CX management operates across three delivery layers with structurally different competitive dynamics: offshore from the Philippines and India, serving the largest volume of global client programs, is under increasing pressure to differentiate on AI capabilities alongside cost efficiency; nearshore from ASEAN to ANZ and Japan is seeing accelerating demand, driven by data sovereignty requirements that pure offshore models cannot satisfy; onshore in Australia, Japan, and Singapore serves regulated-sector demand, where in-country delivery is increasingly non-negotiable.



Source: Frost & Sullivan

# Growth Environment

- The APAC CX management services industry generated revenue of $41.91 billion in 2024. This is forecast to reach $52.57 billion by 2030 at a compound annual growth rate of 3.8%. Growth is driven by accelerating enterprise investment in AI-enabled transformation, which expands outsourcing adoption among first-time buyers. This includes organizations broadening existing mandates to encompass advisory, experience design, and AI deployment that were previously managed in-house.
- APAC is the world's largest offshore CX delivery base, with the Philippines and India serving the majority of North American and European enterprise outsourcing demand. The competitive dynamics of this delivery market are shifting: cost efficiency remains a qualifying criterion, but AI infrastructure investment, workforce depth in analytics and non-voice roles, and delivery governance standards are becoming the primary differentiators in global program awards.
- Japan's CX market is defined by cultural service standards requiring precision, contextual awareness, and high-touch interaction quality that offshore-adjacent delivery models cannot replicate. Organizations are investing in omnichannel strategies, AI-powered voice-of-customer (VoC) analytics, and GenAI-assisted agent tools. Aging demographics, rising healthcare demand, and accelerating digital platform adoption are creating structural growth in high-complexity, high-value CX categories.
- Australia and New Zealand are generating the region's highest-value onshore CX demand. Enterprises are accelerating voice-to-digital migration and AI-powered self-service adoption while tightening data sovereignty and in-country delivery requirements. Government-grade security accreditation and AI governance certification have become active procurement criteria in BFSI, healthcare, and federal government, creating structural barriers for offshore-only delivery models.

# Growth Environment (continued)

- China's CX market is shaped by cross-border eCommerce expansion and intensifying demand for cognitive automation, content moderation, and data privacy management. Clients are more price-sensitive, prioritizing cost efficiency alongside service quality in vendor selection. China's domestic AI regulatory environment is the most developed in APAC, imposing compliance requirements that shape how global providers design and deploy AI systems for Chinese enterprise clients.
- India operates as the region's most significant offshore delivery hub and a rapidly expanding domestic demand market. AI centers of excellence across Bengaluru, Hyderabad, Mumbai, and Pune are repositioning India from cost arbitrage to technology co-development, with leading providers building platform assets in India that are deployed across global client programs. On the demand side, eCommerce, BFSI, and travel and hospitality are driving technology-enabled CX investment, with digital banking and fintech creating high-growth service categories.
- The Philippines remains the dominant offshore location for voice-intensive, English-language CX delivery globally. Competitive differentiation is shifting: providers investing in AI workflow deployment, reskilling programs, and multilingual automation from Philippine hubs are building capability depth that pure labor-scale competitors are structurally less equipped to replicate.
- Southeast Asia's CX demand is expanding across markets at different stages of digital maturity. Southeast Asia functions as both a demand market and a delivery location for regional and global programs. Singapore, Malaysia, Indonesia, Vietnam, and Thailand are generating accelerating CX outsourcing demand across BFSI, eCommerce, telecom, and retail. Concurrently, Malaysia has emerged as the primary ASEAN multilingual delivery hub, with Vietnam and Thailand developing nearshore capacity for regional language programs that complement rather than replicate the Philippines' English-language offshore model.

# Growth Environment (continued)

- BFSI, eCommerce and retail, telecommunications, healthcare, and technology are the highest-volume demand verticals across APAC, with concentration varying by submarket. Trust and safety operations, driven by social commerce growth and digital platform proliferation across Southeast Asia and China, are an accelerating service category that is broadening the addressable scope of CX management engagements beyond traditional contact center boundaries.
- Frost & Sullivan studies related to this independent analysis:
  - Frost Radar: Customer Experience Management Services in Europe, 2026
  - Frost Radar: Customer Experience Management Services in North America, 2026
  - Frost Radar: Customer Experience Management in Asia-Pacific, 2025
  - Global Customer Experience Management Services, Forecast to 2030
  - Customer Experience Management in Asia-Pacific, Forecast to 2030
  - Contact Center Objectives and Investment Plans, 2025 to 2027
  - AI Analytics: Powering Decision Intelligence for the CX Industry
  - Elevating Customer Experience through Strategic Innovation



Source: Frost & Sullivan

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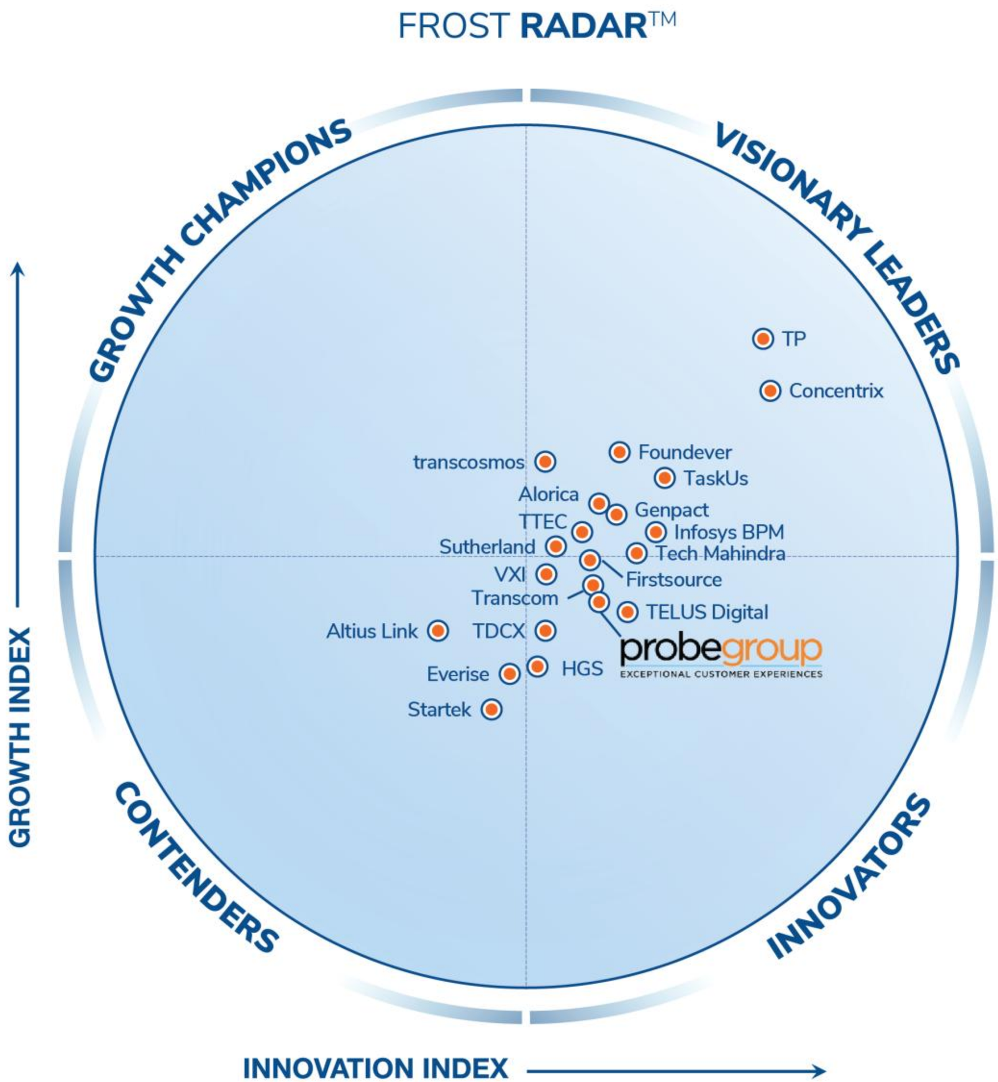
# Frost Radar™

# Customer Experience Management Services In Asia-Pacific

# Frost Radar™: Customer Experience Management Services in Asia-Pacific




In a highly competitive and fragmented market with more than 200 qualified participants, Frost & Sullivan independently evaluated the landscape and selected just 21 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market; demonstrating not only strong growth, but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts. Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.



Source: Frost & Sullivan

# Frost Radar™: Competitor Categories

## GROWTH CHAMPIONS

- Achieve significant market growth through effective execution.
- Leverage proven technologies and scalable business models.
- Maintain competitiveness via operational efficiency and customer focus.
- Require increased innovation investment for sustained leadership.

## VISIONARY LEADERS

- Market leaders with strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

## CONTENDERS

- Emerging players with modest market presence and cautious strategies.
- Often new entrants or niche participants establishing their position.
- Emphasizes continuous improvement and ensures operational reliability.
- Hold potential for growth through innovation, alliances, and market expansion.

## INNOVATORS

- Drive technological advancement with disruptive ideas and solutions.
- Prioritize R&D, IP development, and pioneering concepts.
- Strong innovation foundation with opportunities to accelerate commercialization and scale.
- Benefit from strategic partnerships and targeted go-to-market strategies.



Source: Frost & Sullivan

# Frost Radar™ Competitive Environment

- A set of distinguishing attributes elevates these 21 companies above the broader market:
  - A prominent position in the market (attaining revenue upwards of $200 million in 2025)
  - An ability to help manage the entire customer journey
  - A commitment to technology research and development (R&D) with a solid innovation roadmap
  - Support of digital channels as a part of a broader omnichannel strategy
  - Use of some degree of AI and automation in front- and/or back-office operations
  - A mixed footprint that includes onshore, nearshore, and offshore capacity
  - A technology-intensive approach to drive continuous improvement and rapid innovations
  - Great Place to Work or Best Place to Work certifications in several delivery sites
  - Strong environmental, social, and governance (ESG) practices and tight links with local communities
  - Sustainability reports that are periodically
  - Comprehensive and consistent marketing programs that drive revenue and profits.
- The market attracts leading providers of business process management (BPM), traditional IT services, traditional CX management, and pure-play digital services.

# Frost Radar™ Competitive Environment (continued)

- The 2026 competitive field is more differentiated than any prior cycle on two dimensions that are widening the gap between providers leading market transformation and those following:
  - Agentic AI maturity now stratifies competitive positioning in ways that global scale and headcount alone cannot offset.
  - Commercial model architecture (specifically how far a provider has migrated from FTE-based pricing to outcome-linked or outcome-underwriting engagements) has become a visible selection criterion in competitive evaluations.
  - Probe Group sustains onshore leadership in Australia, where government-grade security accreditation and AI governance certification have become active procurement criteria in BFSI, healthcare, and federal government. TDCX continues to specialize in new-economy and digital-native enterprise CX from its Singapore headquarters, with its going-private transaction enabling accelerated investment in AI enablement through the Chemin and SUPA acquisitions and expanded delivery geography through Open Access BPO.

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# Frost Radar™

# Companies to Action

# Probe Group

**INNOVATOR**

INNOVATION SCORE **3.75**

GROWTH SCORE **2.95**

## INNOVATION

- Probe Group is a leading Australian CX and BPM services provider operating across Australia, New Zealand, the Philippines, and India. The company combines more than 46 years of ANZ market experience with a maturing proprietary technology stack, positioning itself as a digitally enabled, people-led CX partner for government, enterprise, and new-economy clients across the region.
- Recent innovation is anchored on Oration, a proprietary conversational AI and intelligent routing platform developed through technology subsidiary Convai. Oration has evolved from a conventional IVR solution into a capable agentic AI engine, incorporating natural language intent resolution and an AI auto-reinforcement capability that enables continuous model accuracy improvement. The platform is progressing toward ISO 42001 certification, establishing an AI governance posture suited to regulated enterprise clients.
- Probe Group organizes its innovation capabilities through a unified digital persona-based service architecture with 20 underlying agentic AI capabilities. A number of these capabilities (e.g. actionable insights, quality management, and personalised coaching) are delivered through the Probe OS proprietary platform to provide a structured, risk-mitigated pathway for CX transformation and drive operational excellence. Probe's Digital Agent offering houses the remaining agentic AI capabilities, specifically designed for customer self-service and autonomous digital interactions.
- Innovior, the group's digital consulting and operations business, delivers Salesforce Agentforce implementation, Automated Quality Management (AQM), and Billing-as-a-Service (BaaS) to enterprise clients. The BaaS platform achieves up to 80% billing automation rates and has been deployed across hospital groups in Australia, demonstrating cross-sector applicability beyond contact center operations.

# Probe Group (continued)

**INNOVATOR**

INNOVATION SCORE **3.75**

GROWTH SCORE **2.95**

## INNOVATION

- Probe Group reports more than 200 million AI-assisted interactions across 70 client accounts, with 57% of contacts handled digitally across its operations. Its Virtual Agent platform achieves automation rates of up to 75%, and 90% of enterprise CCaaS solutions operate on cloud infrastructure. The group has completed 41 fully managed CCaaS implementations in the ANZ market.
- The company has delivered documented AI transformation outcomes across government, BFSI, retail, and telecommunications verticals in ANZ, including digital deflection programs, intelligent IVR deployments, automated quality management, and conversational AI for culturally specific service contexts. Convai's development of a bilingual voice AI supporting a minority indigenous language represents a notable and, to Frost & Sullivan's knowledge, globally unprecedented application of conversational AI in a production enterprise environment.
- Probe Group's security and compliance posture reinforces its innovation credibility. Accreditations include ISO 9001, 14001, 27001, 45001, and 22301, alongside PCI-DSS, ACSC Essential 8, and AML/CTF alignment. The company is in the process of obtaining its ISO 42001 (AI Management System Framework) certification and has completed Stage 1. These credentials underpin the company's ability to deploy AI-driven solutions in government and regulated enterprise environments where data sovereignty and ethical AI governance are decisive procurement criteria.

# Probe Group (continued)

**INNOVATOR**

INNOVATION SCORE **3.75**

GROWTH SCORE **2.95**

## GROWTH

- Probe Group serves more than 100 clients across government, blue-chip enterprises, and new-economy brands in ANZ, with a 95% contract renewal rate and an average client tenure of nine years. Its 19,000-plus workforce spans four countries, with more than 4,200 onshore staff in Australia and more than 14,800 staff in the Philippines, providing flexible onshore, offshore, and hybrid delivery options across the ANZ client base.
- The company's in-house team of more than 150 digital CX transformation experts supports a consulting-led go-to-market approach in which Probe Group embeds transformation capability alongside managed service delivery. The model differentiates the company from pure-play outsourcers and global providers that lack equivalent onshore ANZ digital depth.
- Probe Group's growth strategy prioritizes four verticals in ANZ: BFSI and fintech, government, healthcare, and travel and leisure. Customer hardship services have emerged as a meaningful near-term growth driver, supported by BFSI contract wins in a sustained high interest rate and inflationary environment. Incoming regulatory reform across superannuation, aged care, and financial services is expected to generate durable volume growth in high-complexity, high-empathy interaction categories where the company's onshore model and compliance credentials are competitively differentiated.
- The group is pursuing selective geographic diversification beyond ANZ. Its managed services business generates revenue from North American clients, and a newly established partnership with a UK-based corporate membership organization intends to position Probe Group as its exclusive APAC CX partner for member companies evaluating regional expansion.

# Probe Group (continued)

**INNOVATOR**

INNOVATION SCORE **3.75**

GROWTH SCORE **2.95**

## GROWTH

- Digital and AI transformation roadmaps have been developed for a substantial majority of key client accounts, incorporating Oration alongside third-party platforms including Genesys Cloud, Salesforce, and Microsoft Azure. The proactive roadmapping approach supports client retention and creates structured pathways for expanding share of wallet as clients progress through their digital maturity journeys.
- Recognition from multiple independent research and advisory organizations in consecutive years is a testament of Probe Group brand equity and execution. Industry awards in the last two years span AI deployment, employee experience, contact center transformation, and public sector digital services, reflecting the breadth of its capability narrative.

# Probe Group (continued)

**INNOVATOR**

INNOVATION SCORE **3.75**

GROWTH SCORE **2.95**

## FROST PERSPECTIVE

- Probe Group has improved its Frost Radar™ positioning, with gains on the Innovation Index driven by the maturation of Oration, the ProbeOS framework, and a structured agentic AI roadmap with verifiable client outcomes across multiple ANZ verticals. The company holds a distinctive position in this APAC analysis as the only ANZ-headquartered provider in the cohort, competing against global peers through deep local market expertise, differentiated security accreditations, and a proprietary technology stack that is increasingly capable.
- A 95% contract renewal rate and a nine-year average client tenure signal consistent execution quality and enduring brand equity in the ANZ market. The group's government-grade security accreditations and progressing ISO 42001 certification create a barrier to market entry for offshore-heavy competitors that have structural regulatory compliance constraints.
- Probe Group should deepen vertical specialization in BFSI, healthcare, and government, where converging regulatory complexity and rapid AI adoption are creating durable, premium-priced service opportunities aligned with its onshore capabilities and compliance credentials.
- The company's service focus remains concentrated in ANZ, which limits its ability to attract clients that require pan-APAC regulatory compliance. A regional presence beyond its current footprint would be essential for a wider market play. Greater mindshare in pan-APAC buyer and analyst communities would support the company's international growth ambitions and reinforce its position as a credible digital-first provider rather than an ANZ specialist.

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# Best Practices & Growth Opportunities

# Best Practices

1

Agentic AI governance must be embedded into everyday contact options. North American and European enterprise clients are extending compliance requirements, data residency, model explainability, and escalation protocols directly into APAC delivery contracts. Providers that apply different governance standards onshore versus offshore will risk being sidelined. Reskilling Philippines- and India-based workforces for AI orchestration and oversight roles is a crucial investment in the region today.

2

Domain-specific models, agentic workflow libraries, and compliance-embedded delivery frameworks establish defensible competitive positions in APAC enterprise procurement and global offshore program deals and contracts. Providers with proprietary vertical assets in healthcare, BFSI, and eCommerce hold advantages that horizontal platform investments and hyperscaler partnerships cannot replicate.

3

Technology partnerships, co-development agreements, and AI vendor equity positions must be structured to serve the full scope of global programs delivered from APAC hubs. Ecosystem quality is increasingly evaluated by global enterprise procurement teams selecting delivery partners. Providers that treat their partner ecosystem as a local marketing tool rather than as proof of genuine global delivery capability are failing to leverage their most powerful competitive differentiator.



Source: Frost & Sullivan

# Growth Opportunities

1

Growth in the APAC CX management services market is concentrated across three distinct demand layers: offshore delivery, differentiated by AI capability and workforce depth; nearshore delivery across ASEAN, ANZ, and Japan, the fastest-growing tier driven by data sovereignty requirements pure offshore cannot meet; and onshore domestic demand, commanding the highest margins in regulated sectors. Providers anchored to a single layer are competing for a shrinking share.

2

Outcome-linked commercial models are taking hold across APAC delivery, driven by enterprise clients demanding performance accountability rather than activity measurement. Philippines- and India-based delivery operations that connect AI deployment to verifiable client metrics, first contact resolution, handle time, and revenue conversion are winning consolidated global program awards over pure cost competitors. This shift applies equally to offshore programs serving Western clients and to APAC domestic mandates.

3

Make compliance-by-design the foundation of every AI-enabled engagement in APAC. India's DPDP Act, Australia's Privacy Act reform, Singapore's Model AI Governance Framework, and Japan's amended PIPA, combined with the extraterritorial reach of HIPAA, GDPR, and SOC 2 into offshore delivery contracts, are making compliant-by-design AI infrastructure a procurement qualifier in regulated verticals globally. Providers building this capability into APAC operations convert regulatory complexity into a solid credential.



Source: Frost & Sullivan

# Frost Radar™ Analytics

# Frost Radar™: Benchmarking Future Growth Potential
# 2 Major Indices, 10 Analytical Ingredients, 1 Platform

## Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

**GI1**

**MARKET SHARE (PREVIOUS 3 YEARS)**
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

**GI2**

**REVENUE GROWTH (PREVIOUS 3 YEARS)**
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar.

**GI3**

**GROWTH PIPELINE**
This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

**GI4**

**VISION AND STRATEGY**
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

**GI5**

**SALES AND MARKETING**
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

# Frost Radar$^{TM}$: Benchmarking Future Growth Potential 2 Major Indices, 10 Analytical Ingredients, 1 Platform

## Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

**II1**

**INNOVATION SCALABILITY**
This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

**II2**

**RESEARCH AND DEVELOPMENT**
This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

**II3**

**PRODUCT PORTFOLIO**
This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

**II4**

**MEGATRENDS LEVERAGE**
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found here.

**II5**

**CUSTOMER ALIGNMENT**
This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

# Next Steps



**JOIN:**
Growth Council

**APPLY:**
Companies to Action

**ENGAGE:**
Growth Dialog

**PARTICIPATE:**
Growth Council Think Tank

**Does your current system support rapid adaptation to emerging opportunities?**



Source: Frost & Sullivan

# Legal Disclaimer

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