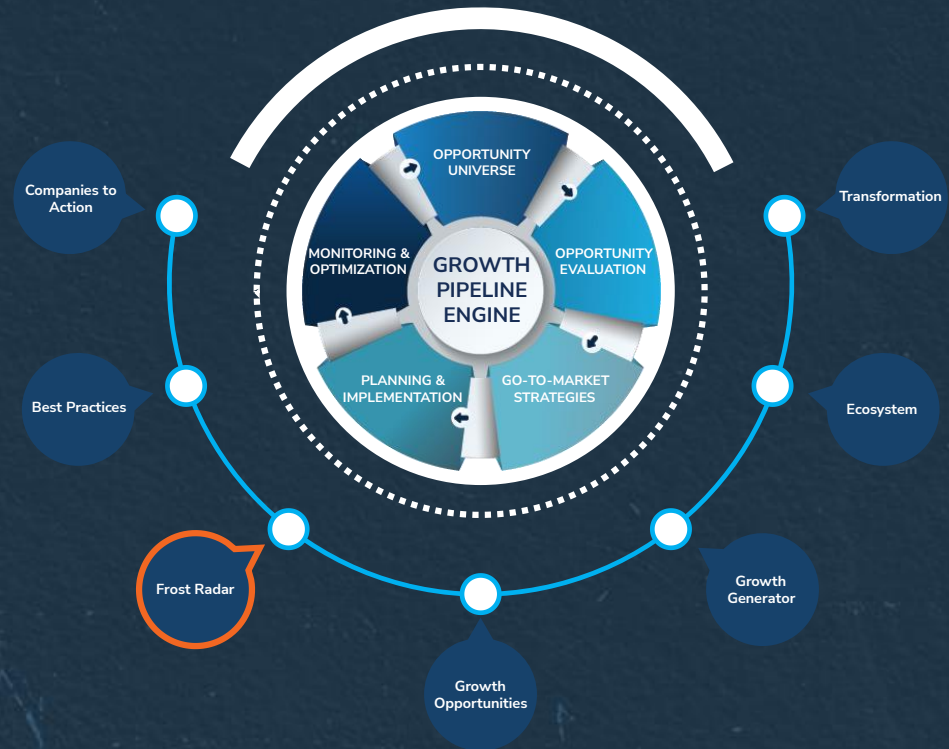


# Frost Radar™ : Customer Experience Management in Asia-Pacific, 2025

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

- Customer experience (CX) has become a prominent competitive differentiator in the digital age as customers demand personalized, proactive, and consistent experiences throughout their journey. Delivery of superior CX is essential for long-term loyalty, brand relevance, and top-line growth.
- CX management services have become the foundation for connected experiences across all touchpoints and throughout each interaction journey, from onboarding to post-purchase support.
- Organizations in the Asia-Pacific region are gradually investing in digital technologies, intending to deliver hyper-personalized experiences. However, legacy infrastructure and operational processes, as well as the complexity of an interaction, can hinder the end-to-end automation of the CX journey. These challenges have highlighted the need for a balanced approach between technology-based transformation and the human touch.
- Frost & Sullivan research indicates that a digital-first mindset drives organizations in the region as they transform from legacy models to technology-based CX processes and services. Outsourcing that once focused on offshore, low-skill customer support roles and labor-intensive services are evolving into hybrid models that combine artificial intelligence (AI)-enabled efficiencies and human expertise.
- Next-generation technology solutions, including intelligent automation and AI, are transforming and fundamentally redefining the value proposition that CX management services deliver. As organizations embark on their CX transformation journey, they are investing in digital transformation advisory services, experience design, generative AI (GenAI), agentic AI, large language models (LLMs), self-learning bots, and data analytics solutions.
- Today's organizations pursue more than cost savings; they require CX management service providers that enable end-to-end CX transformation, increase scalability and agility, and boost compliance.

## Strategic Imperative (continued)

- The secret to a service provider's success is the ability to deliver deep domain expertise, industry-specific CX capabilities, and tangible business outcomes. Consultative engagements, in which service providers act as partners rather than just vendors, is a trend. Providers with the right blend of service delivery models, people, processes, and technologies will enjoy a competitive edge in the market.
- Service providers must transition from labor-centric to technology-first approaches while utilizing AI, data analytics, and automation to deliver quantifiable business value. Generic CX service offerings are losing relevance as clients seek domain expertise applicable to their specific industries. To differentiate, providers must build deep capabilities leveraging vertical-specific AI models, compliance frameworks, and regulatory knowledge databases.
- Data and technology competencies are crucial for CX service providers. Experience orchestration to create a seamless and personalized journey requires insights and capabilities that deliver technology-enabled solutions across the entire customer journey. Intelligent solutions leverage data and insights to optimize journeys, deliver business results, and satisfy cost and experience metrics.
- With employment functions being redefined by AI and automation, CX providers are investing in reskilling and upskilling to build a talent pool competent in AI, analytics, and process automation. The potential for CX services revolves around human-AI collaboration, where employees prioritize higher-value tasks, including CX orchestration, insight-driven decision-making, and exception handling.
- Sustainable and ethical practices, employee well-being, and responsible AI adoption are becoming non-negotiable for enterprises. Providers must align with ethical AI practices, objectives, and deployment policies. This means that rigorous internal governance and robust data security and privacy initiatives must be in place to maintain credibility, avoid legal issues, and preserve long-term partnerships.

# Growth Environment

- The Asia-Pacific CX management services industry generated revenue of \$39.80 billion in 2023 and is forecasted to reach \$48.78 billion by 2029 at a compound annual growth rate of 3.4%. Economic shifts, changing customer expectations, a growing focus on customer-first and digital-first strategies, and disruptive technologies (including digital platforms and cloud) are influencing industry dynamics.
- CX outsourcing continues to increase. Many organizations are outsourcing for the first time, while others are outsourcing CX processes previously destined for in-house operations.
- Globalization and cross-border eCommerce growth have heightened the demand for multilingual support, trust and safety roles, and compliance with international standards. Customer expectations for more personalized, seamless, and real-time interactions and the rise of digital channels have pushed organizations to adopt omnichannel CX strategies.
- Significant developments in the region:
  - CX management strategies in Japan are influenced by a unique culture and customs that place higher value on polite service, meticulous attention to detail, and overall experiences. Organizations are implementing omnichannel CX strategies and AI and data analytics insight platforms that influence customer purchasing behavior.
  - Australia and New Zealand are experiencing a surge in digital-first customer interactions, with organizations leveraging AI-powered self-service solutions, chatbots, and automation to scale operations efficiently and move customers from voice to non-voice channels, such as chat and messaging, to improve efficiency and lower costs. AI-powered automation reduces human intervention and enhances experiences through predictive analytics and self-service.

## Growth Environment (continued)

- China is seeing more demand for cognitive automation, GenAI, advanced CX management, content moderation, data privacy, and digital security solutions. Clients have become more price-sensitive, prioritizing cost over service quality during the service provider selection process. Organizations want help with improving efficiency, reducing costs, and expanding into overseas markets,.
- India's CX management services market is fueled by the demands from the eCommerce; banking, financial services, and insurance (BFSI); and travel and hospitality industries for technology-enabled services to reduce costs, diversify operations, and support regional growth.
- In South Korea, clients are becoming more cost-conscious and demanding higher returns on investment. Despite interest in GenAI, there is a hesitancy in adopting new technologies, with many taking a wait-and-see approach.
- Southeast Asia has undergone an evolution driven by robust mobile penetration and rapid adoption of 5G technology.
  - Singapore is seeing a high demand for sophisticated CX solutions in BFSI, technology, and healthcare.
  - Malaysia's demand is especially high in telecom, BFSI, and eCommerce, driven by the digital economy, digital banking, and the digitization of government operations.
  - In Thailand, significant demand in automotive, retail, and hospitality is driven by domestic consumption and government investments.
  - Economic growth and increasing digital adoption in Indonesia fuel demand for CX solutions in eCommerce, telecom, and BFSI.
  - In Vietnam, CX services are in demand in manufacturing, technology, and telecom.

# Growth Environment (continued)

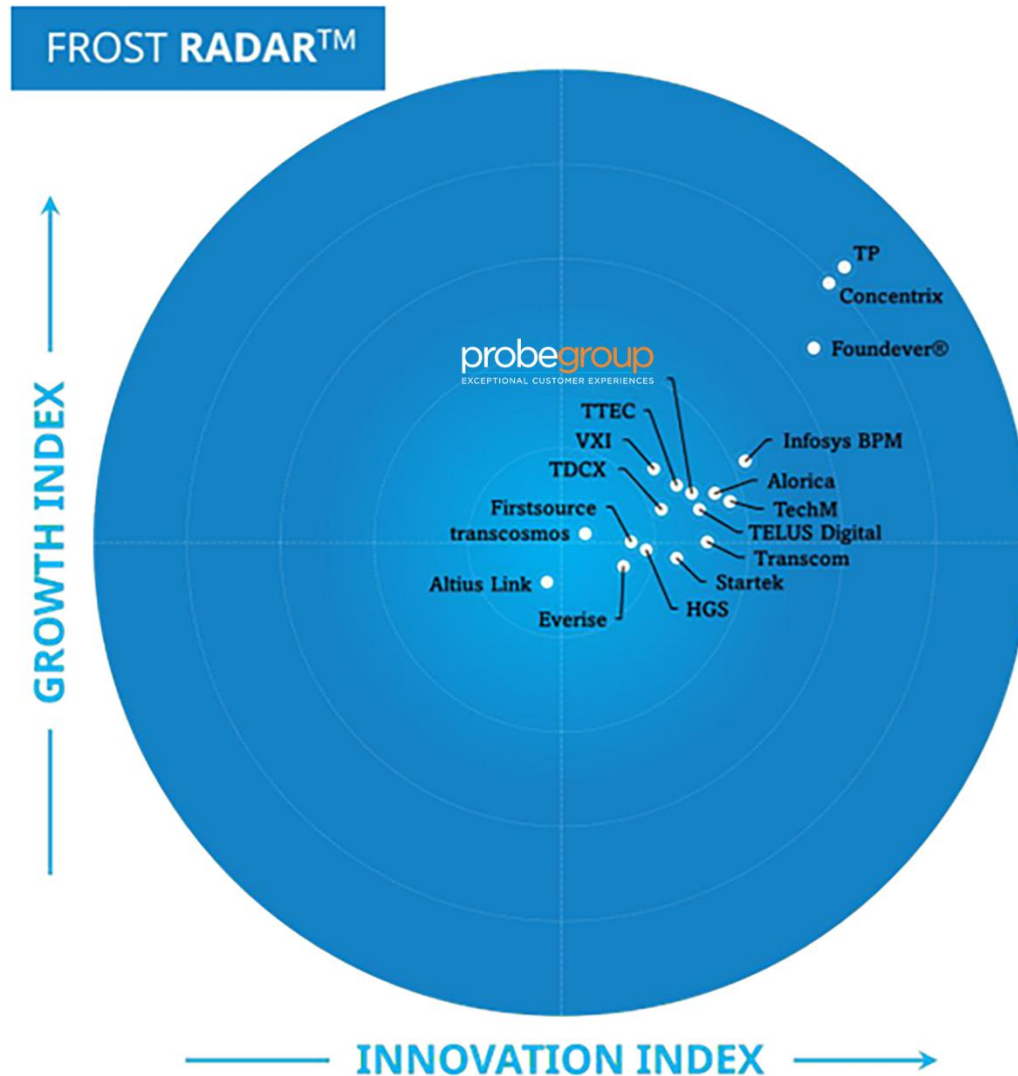
- Frost & Sullivan studies related to this independent analysis:
  - [Frost Radar™: Business Process Management Services, 2025](#)
  - [Frost Radar™: Customer Experience Management Outsourcing in North America, 2025](#)
  - [Frost Radar™: Customer Experience Management in Asia-Pacific, 2024](#)
  - [Predictions for CX Transformation, 2025 to 2026](#)
  - [Global Business Process Management Services, Forecast to 2029](#)
  - [Global Customer Experience Management Services, Forecast to 2029](#)

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





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



# Frost Radar™ Competitive Environment

- From a field of more than 200 global and local industry participants, including more than a dozen smaller companies that are either exploring the CX management services market or have recently entered it, this Frost Radar™ evaluates the 18 most significant service providers considering market reach, user adoption, growth rates, and product innovation.
- Most participants in the analysis have a core set of competencies that help with market differentiation. These companies:
  - Occupy a prominent position in the market (attaining more than \$200 million in revenue in 2024)
  - Exhibit continuous improvement methodologies and/or certifications
  - Demonstrate disruptive innovations that bring tangible benefits to clients
  - Show a solid product roadmap for the short, medium, and long terms
  - Orchestrate several technology stacks (proprietary and third-party) to develop bespoke solutions
  - Have advisory, consulting, and customer journey design mapping service capabilities
  - Support digital channels as part of an omnichannel platform
  - Sustain a mixed geographic footprint, including capacity onshore, offshore, or nearshore
  - Work toward a vision of seamless and effortless CX
  - Leverage some degree of automation in frontend and/or backend operations
- 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)

- All providers featured on this Frost Radar™ have innovated in several tools and solutions, and many exhibit an in-depth and sometimes similar product roadmap. For this reason, it can be difficult to find competitive differentiation in this industry.
- Australian service provider Probe Group strengthened its CX management capabilities, domestic operations, and client base after the acquisitions of Innovior, Convai, MicroSourcing, and Beepo.

# Frost Radar™: Companies to Action



# Probe Group

## INNOVATION

- Probe Group is a leading Australian CX and BPM services provider. It is committed to empowering people, driving innovation, and harnessing technology to deliver meaningful experiences.
- The company emphasizes building modern digital organizations by leveraging technologies to enhance and not replace the human touch. This has enabled it to deepen its understanding of local businesses and market challenges and deliver specialized services across multiple industries.
- As an intelligent CX optimization partner, Probe Group combines digital innovation with a people-first approach to deliver meaningful experiences to enterprises.
- Probe Group redesigns legacy customer management processes through digital solutions, including intelligent automation, natural language speech recognition, conversational AI, and data analytics. The company delivers hyperlocalized CX solutions (combining its proprietary solutions with other key partners), including CX, contact centers, revenue optimization, digital services, digital products, knowledge management, and managed services.
- The company has invested heavily in strengthening its digital capabilities, including GenAI and automation technologies, in-house digital product development, and the ability to provide advanced digital solutions across industries. It has developed an innovative zero trust network, cloud-based offerings, and advanced geo-fencing capabilities.
- Through technology subsidiary Convai, it developed Oration, a proprietary, cloud-based conversational AI and interaction routing solution that utilizes AI, advanced speech recognition, and supervised learning to understand customer intent and route the interaction to the right contact center agent or self-service solution.

## Probe Group (continued)

### INNOVATION

- Over the next 6 to 12 months, the company's product roadmap is focused on scaling AI-driven intelligence, strengthening data integrity, and simplifying technology integration to sustain a long-term competitive advantage.
- The company has embedded AI-driven data enrichment into core workflows to enhance decision-making with accurate insights and recommendations and automate repetitive workflows to reduce errors and increase efficiency. AI-driven coaching and real-time microlearning in frontline operations deliver personalized, context-aware guidance to contact center agents during customer interactions, helping them adapt to evolving business needs and enhance their performance.
- Probe Group has strengthened its partnerships through collaborative proof-of-concept/proof-of-value projects to bring cutting-edge AI solutions into production. For example, it leveraged Salesforce's Service Einstein and Agentforce AI capabilities to enhance customer service and agent productivity; Genesys's Co-Pilot to enhance AI-powered agent assistance and automation; Symtrain's AI-driven simulation training to optimize agent readiness and performance; and Sprinklr's enhanced AI-driven customer insights and omnichannel engagement.

## Probe Group (continued)

### GROWTH

- Probe Group's brands—Probe CX, Innovior, Convai, MicroSourcing, and Beepo—drive growth through their own unique services.
- Probe Group has more than 19,500 employees across Australia, New Zealand, the Philippines, the United States, and India. It supports BFSI, healthcare, technology, education, government, utilities, travel, and logistics clients.
- Probe Group records consistent growth across its core markets of Australia and New Zealand, driven by demand for high-value, onshore CX management and digital CX consulting services, particularly for industries requiring strong regulatory compliance, customer trust, and complex issue resolution.
- The company is strengthening its presence in Australia and New Zealand with localized expertise and expanding strategically in North America, tapping into a growing market that requires sophisticated CX and digital transformation solutions.
- Over the past 5 years, it has seamlessly integrated assets gained through the acquisition of customer management and shared services companies including Stellar, Salmat Contact, MicroSourcing, Beepo, and Innovior.

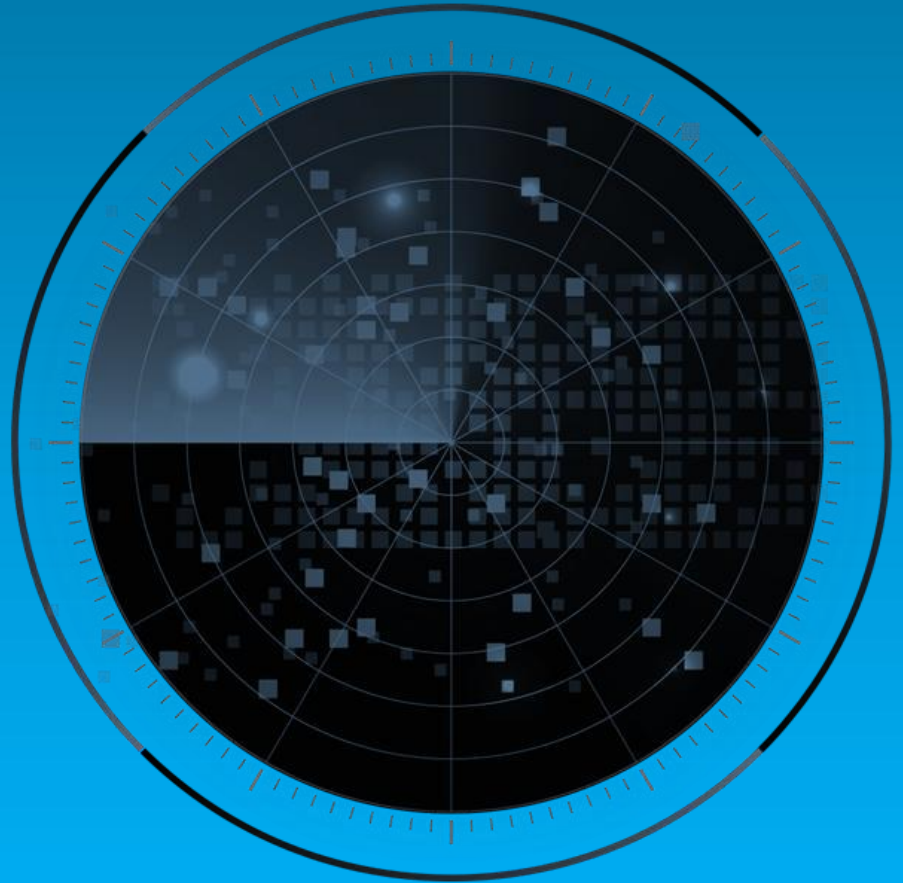
## Probe Group (continued)

### FROST PERSPECTIVE

- Probe Group has improved its position on the Frost Radar™ because of its growing client base in Australia, growth expansion strategies in the Philippines and India, and successful acquisitions.
- The company leverages its workforce in the Philippines and India to provide cost-effective customer service solutions while maintaining high service quality. Its nearshore and offshore models allow businesses to scale operations efficiently.
- Probe Group has deep knowledge of the Australian and New Zealand markets, strong relationships with local brands, and the ability to navigate local regulatory environments.
- The company will benefit from effectively showcasing its expertise in complex interactions and digital transformation and building stronger narratives around its wins in specific verticals.
- The company's focus on strategic verticals and ability to leverage CX consulting and digital services have resulted in deeper engagement and expansion of service lines.
- Probe Group has evolved from being a boutique provider to a recognized industry leader through service excellence, value-added service capabilities, and expansion into new areas. The company should leverage acquisitions and partnerships to expand its CX solution capabilities. Cloud, AI, automation, and quality assurance will be important areas to enhance its service offerings and delivery and bolster its growth momentum in the region.



# Best Practices & Growth Opportunities



# Best Practices

# 1

CX management service providers are striving to balance cost efficiency and value creation in an increasingly competitive environment. They must address client organizations' current priorities, unique challenges, and upcoming technological requirements. To realize quantifiable outcomes, providers should integrate advanced technologies with human-, domain-, and industry-specific expertise to strengthen business relationships.

# 2

CX management is not a technology-only play. Contact center employee engagement and management are fundamental to value. As customer interactions become more complex, providers need highly skilled, engaged employees to deliver the intended outcomes. Providers must differentiate themselves through a positive culture, continuous skill development, and employee value propositions to win and retain business.

# 3

Strategic alliances and collaborations with technology providers (including start-ups), educational institutes, and other relevant vendors are pivotal to fostering innovation and building a robust ecosystem. A well-structured partnership program and integrated ecosystem allow service providers to leverage diverse expertise and resources while co-creating solutions with clients to enhance value and drive innovation in service delivery.

# Growth Opportunities

## 1

Organizations want a comprehensive suite of innovative CX management services. Service providers must offer cost-effective, multilingual, and culturally attuned delivery that is hyper-localized to country- and customer-specific preferences.

## 2

The technology landscape is the most dynamic in decades. GenAI and agentic AI are transitioning from experimental phases to practical business applications, delivering substantial benefits to clients. Still, organizations worry about the implications of customer-facing, GenAI-based applications. Service providers must allay data security, privacy, governance, and brand reputation concerns.

## 3

In a data-centric world, data security and compliance are essential and the foundation for customer trust and business resilience. Service providers must proactively navigate and adapt to the intricate landscape of data protection laws while embedding advanced security measures and a culture of data privacy across their people and operations. These practices, combined with transparency and accountability, elevate providers to the position of trusted partners.

# 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™: Benchmarking Future Growth Potential

## 2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

### 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.

# Legal Disclaimer

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