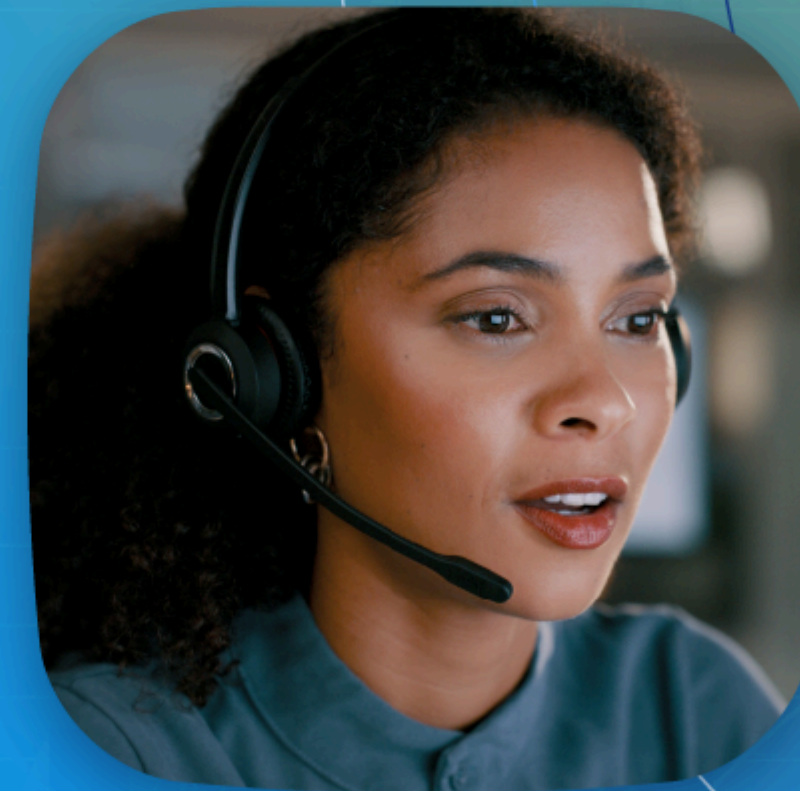# AVOXI®

The State of
International Voice for the Contact Center

Customer Service & Sales:
Trends & Challenges for Managing Global Voice

In collaboration with

metrigy

TABLE OF CONTENTS

ABOUT THIS REPORT

The State of International Voice for the Contact Center explores the key challenges and opportunities multinational enterprises face in optimizing global voice.

The research is based on a survey of 371 respondents and was conducted by Metrigy, an innovative research and advisory firm focusing on the rapidly changing areas of workplace collaboration, digital workplace, digital transformation, customer experience, and employee experience—along with several related technologies. This comprehensive analysis aims to support IT and contact center decision makers as they enable their customer service and sales operations and evolve their voice solutions.

The report covers critical questions including:

Company plans in migrating physical voice services to cloud environments

The importance of performance, such as call quality, coverage, reliability and more

Voice provider management and platform expectations

The expected future state and benefits of voice in the cloud and AI for the voice channel

Paths for enterprises to consolidate global cloud voice to a modern software platform.

INTRODUCTION FROM OUR CEO

For companies with global operations, voice remains a critical channel for delivering real-time customer service and sales experiences via the contact center.

Despite the rise of digital channels, customers require immediate access to resolve complex issues, and voice provides this with global availability and real-time problem solving. Contact center teams prefer voice for its immediacy, clarity, and reliability, making it essential for handling complex transactions and providing a human touch that enhances customer satisfaction and loyalty.

But voice solutions must evolve. The urgency to migrate legacy voice to the cloud is accelerating, prompting leaders to evaluate contact center and communications applications and rethink organizational structures to better support these solutions.

However, deploying cloud voice services across multiple countries, number types, and capabilities presents challenges. IT and telecom leaders face unique international voice communication challenges, including regulatory compliance, network reliability across borders, and ensuring consistent voice quality everywhere in the world.

At AVOXI, we pride ourselves on our deep understanding and commitment to delivering high-quality, international cloud voice solutions via a global software platform.

We developed this report to fill a market gap of data and feedback from customers on the specific challenges, opportunities, and plans multinational companies face when managing international voice for contact centers. This first-of-its-kind report, based on extensive research and analysis, provides insights into the evolving dynamics of global voice communication and its impact on enterprise contact center operations.

We would like to acknowledge the invaluable contributions of our research partner, Metrigy, in collaborating with us to develop this insightful content. Their expertise has been instrumental in ensuring the accuracy and relevance of the data presented.

I encourage you to explore the findings of this report and leverage its insights to navigate the complexities of the international voice landscape successfully. Together, we can continue to innovate and lead in transforming global voice communication.

Warm Regards,

Barbara Dondiego

Barbara Dondiego, CEO
AVOXI

International Voice Challenges for Multinational Enterprises

Optimizing international voice services poses significant challenges for most multinational enterprises, particularly in customer service and sales channels. These challenges can be broadly categorized into two tiers: first-tier challenges and next-tier challenges.

Security, Data Privacy, and Call Quality are at the Forefront

Certain common challenges encompass critical issues that are non-negotiable for almost all enterprises. Security, data privacy, and call quality top this list (Figure 1). In fact, 41% of respondents described call quality and data privacy as very challenging, with 44% rating security as very challenging. Ensuring secure communication channels is paramount, as any breach and call fraud can lead to significant financial and reputational damage.

> " **Toll fraud is a mindboggling issue.**
> – Executive, Healthcare

Related, data privacy is equally crucial, especially with varying regulations across countries that companies must adhere to. Call quality is vital for maintaining professional and effective communication with customers; poor call quality can lead to misunderstandings, frustration, and ultimately, a loss of business.

Reliability, Integrations, and Coverage are Close Behind

Additional key challenges include considerations such as service reliability, system integrations, and geographic coverage, with nearly one-third of respondents rating these issues as very challenging. Service reliability refers to the consistency and dependability of the voice services, which is crucial for maintaining uninterrupted communication.

System integrations involve the ability to connect voice services with other business applications, such as contact center, unified communications, CRM and other business software, to streamline operations. Geographic coverage is essential for companies operating in multiple regions, ensuring they can maintain effective communication channels globally.

How would your company rate the significance of the following challenges around international customer service/sales calling? (on a scale of 1 - 7)
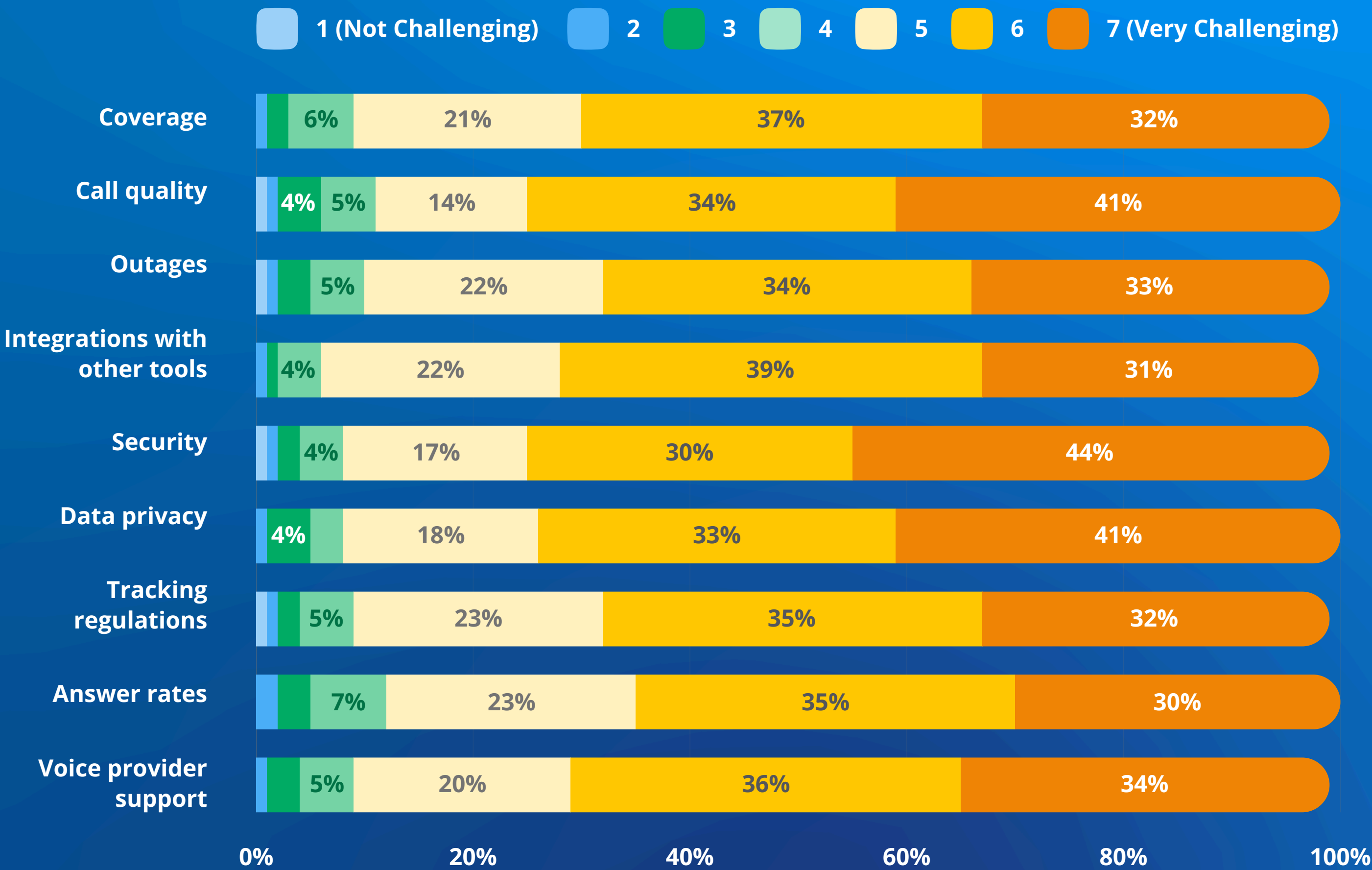
Legend: 1 (Not Challenging) | 2 | 3 | 4 | 5 | 6 | 7 (Very Challenging)

Challenge	3	4	5	6	7
Coverage		6%	21%	37%	32%
Call quality	4%	5%	14%	34%	41%
Outages		5%	22%	34%	33%
Integrations with other tools		4%	22%	39%	31%
Security		4%	17%	30%	44%
Data privacy		4%	18%	33%	41%
Tracking regulations		5%	23%	35%	32%
Answer rates		7%	23%	35%	30%
Voice provider support		5%	20%	36%	34%

Figure 1. Security, data privacy, and call quality are the leading international voice challenges for enterprises, but the challenges around reliability, integrations and coverage aren't far behind.
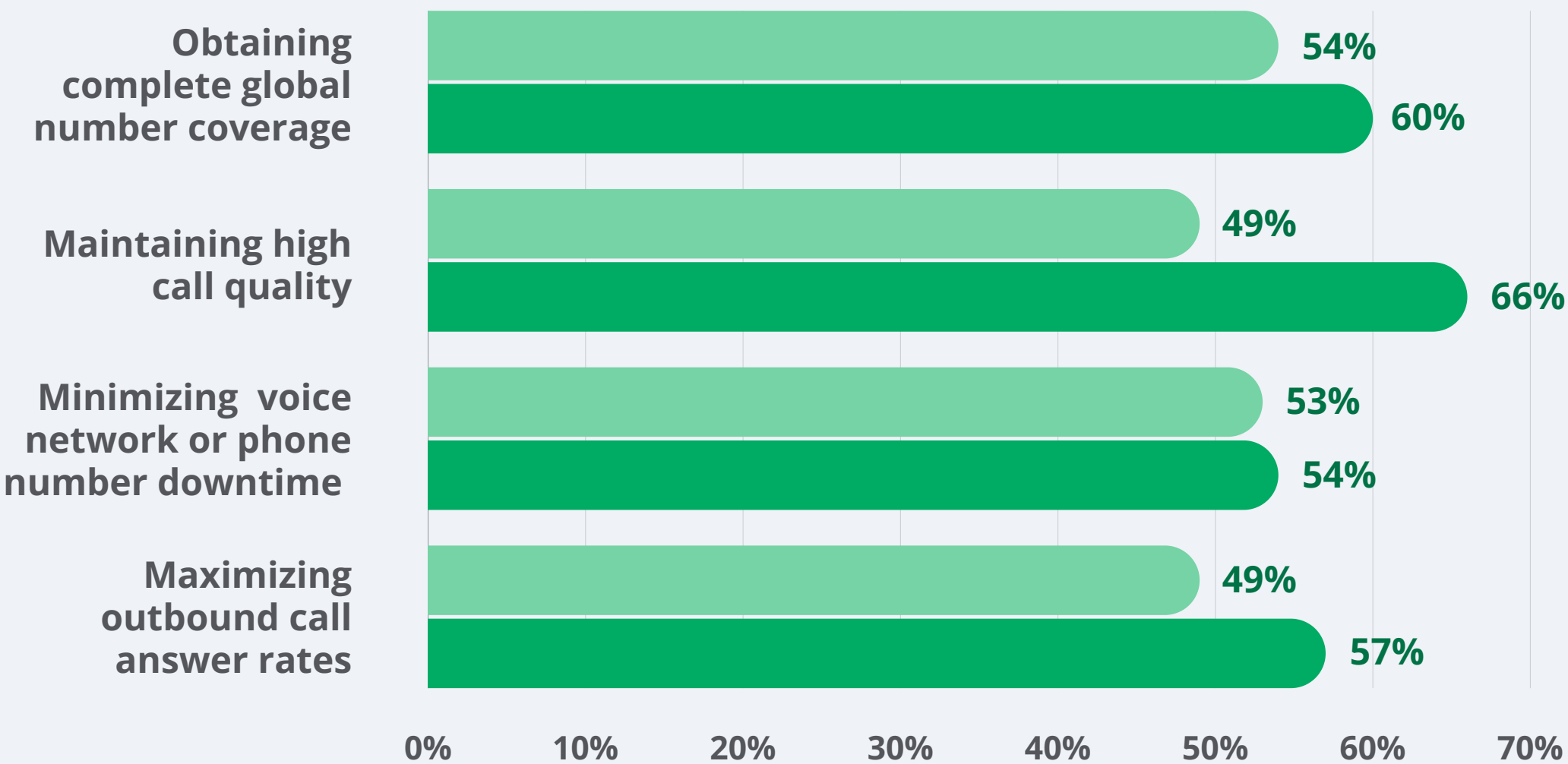
Scale of Operations

The scale of operations significantly impacts the complexity of managing international voice services. More global companies (operating in more than 25 countries) cite greater challenges from voice solutions than regionally focused multinationals. These have potential impacts on delivering desired business outcomes, such as providing effective customer service and revenue (Figures 2a and 2b).

Larger operations require more robust and scalable solutions to handle the complexity of managing more providers, customer types, regions and time zones. Whether it comes to managing service or sales, call quality is top of mind for over 60% of respondents operating in more than 25 countries, while obtaining number coverage is second.
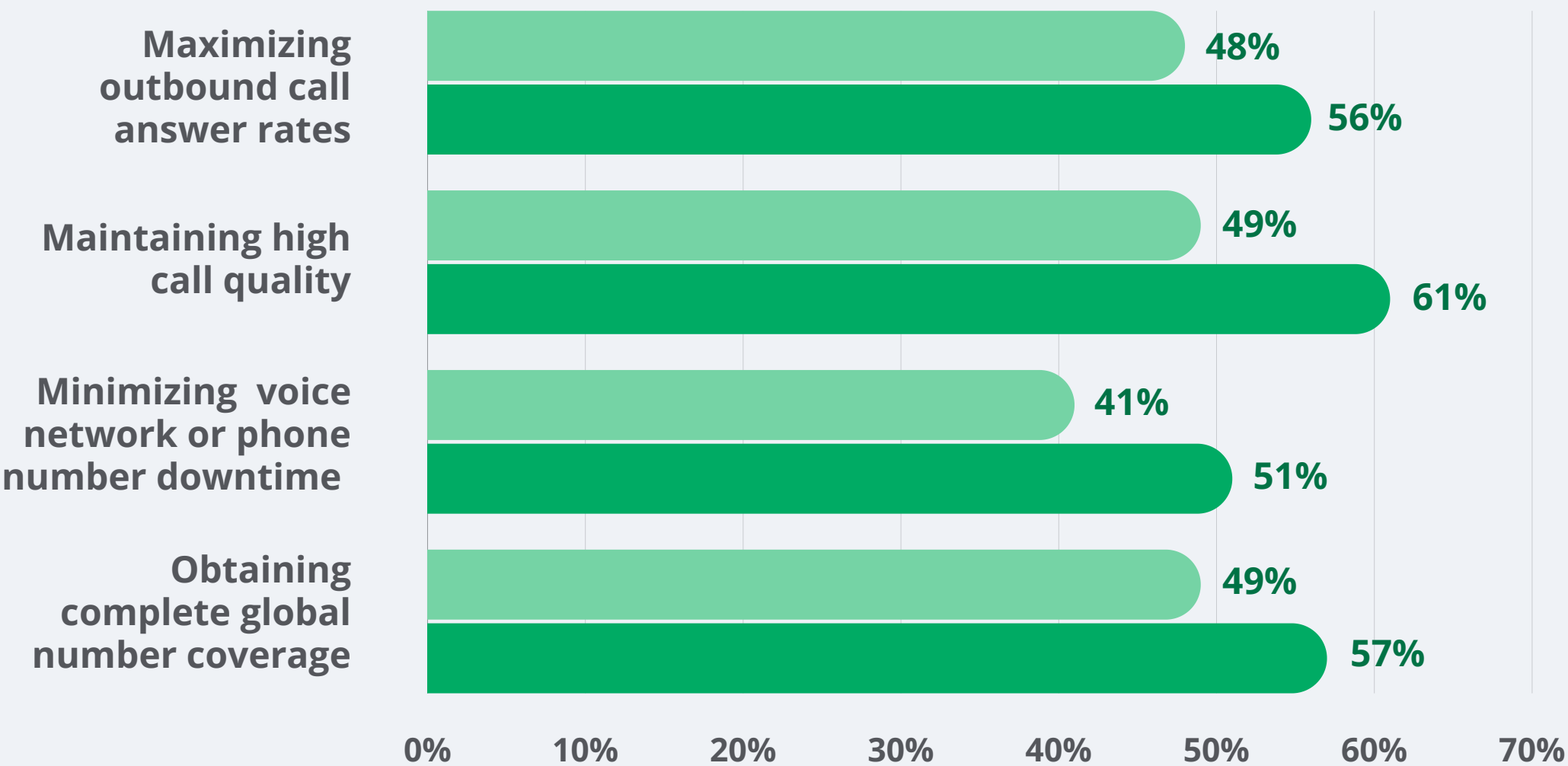
Percentage of Companies Citing Voice Requirements as Significantly Challenging Desired Outcomes (By Number of Countries with Operations)

Companies operating in 5-25 countries

Countries operating in more than 25 countries

Provide Effective Customer Service / Experience (Figure 2a)

Challenge	5-25 countries	>25 countries
Obtaining complete global number coverage	54%	60%
Maintaining high call quality	49%	66%
Minimizing voice network or phone number downtime	53%	54%
Maximizing outbound call answer rates	49%	57%

Drive Revenue (Figure 2b)

Challenge	5-25 countries	>25 countries
Maximizing outbound call answer rates	48%	56%
Maintaining high call quality	49%	61%
Minimizing voice network or phone number downtime	41%	51%
Obtaining complete global number coverage	49%	57%

Note: Represents % of respondants that rated challenge as a 6 or 7 on a Scale of 1-7.
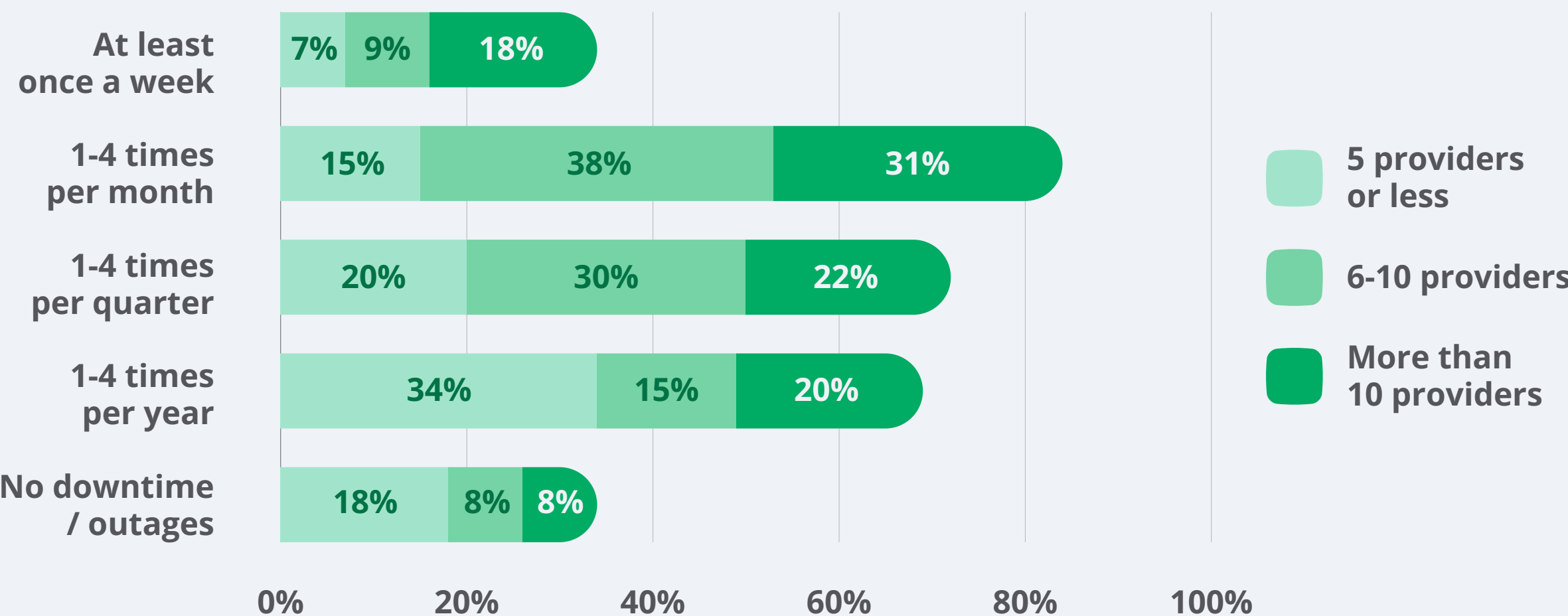
Downtime and Outages Must Not be Ignored

A major concern for multinational enterprises is downtime in their primary call centers. An alarming 85% of respondents reported periodic downtime, with about 60% experiencing these outages multiple times per quarter (Figure 3). The duration of these outages is also significant, with 56% lasting from 30 minutes or more, and over 20% lasting between one to five hours (Figure 4).

In many cases, the more voice providers a company has, the more frequently outages are reported. These disruptions can have severe implications for customer service and sales, leading to missed opportunities and customer dissatisfaction.
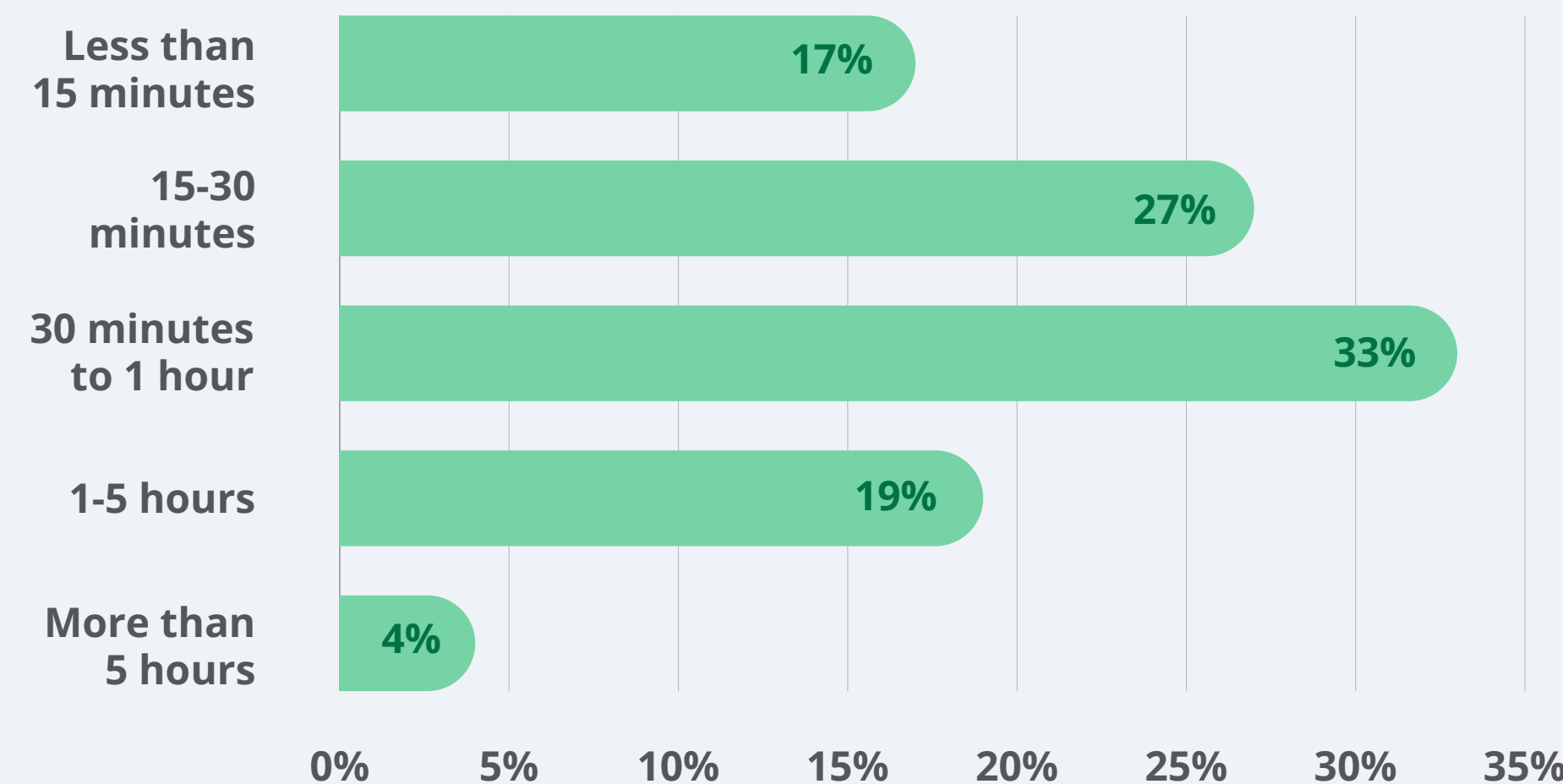
Call Center Downtime by Number of Providers in Use

How frequently does your company's primary call center experience outages/downtime? (By number of voice providers used) (Figure 3)

	5 providers or less	6-10 providers	More than 10 providers
At least once a week	7%	9%	18%
1-4 times per month	15%	38%	31%
1-4 times per quarter	20%	30%	22%
1-4 times per year	34%	15%	20%
No downtime / outages	18%	8%	8%

Note: A small percentage of respondents said they were 'Unsure' to this question.

How much time does your company lose monthly due to outages / downtime of its customer service/sales support lines? (Figure 4)

Less than 15 minutes	17%
15-30 minutes	27%
30 minutes to 1 hour	33%
1-5 hours	19%
More than 5 hours	4%

Note: A small percentage of respondents said they were 'Unsure' to this question.

As the research shows, optimizing international voice services for multinational enterprises involves addressing both critical and important challenges. Ensuring security, data privacy, and call quality, along with maintaining reliable service, seamless integrations, and extensive coverage, is essential.

As operations scale, the complexity and impact of these challenges increase, underscoring the need for robust and scalable solutions to minimize downtime and maintain effective communication channels.

> **Reliability is an important factor, as is the cost of system ownership. On cost, even though cloud is more expensive, it's a positive difference between OpEx and CapEx. Plus, cloud services provide a better way to scale the business.**
>
> – Executive, Healthcare

Provider Landscape and Consolidation Trends

**To meet their international voice needs, companies have historically resorted to stitching together a patchwork of providers.** This has been driven by the need to fulfill business requirements and achieve performance across regions.

The vast majority of respondents (92%) are using more than one provider, with 56.5% relying on between two to five providers, and nearly a quarter (23%) using more than 15 providers (Figure 5).

35%

More than a third
of respondents use

11 or more
voice providers.

Number of Providers in Use for International Voice for Customer Service/Sales Calling

1	2 - 5	6 - 10	11 - 25	More than 25
8.1%	33%	23.5%	27.9%	7.3%
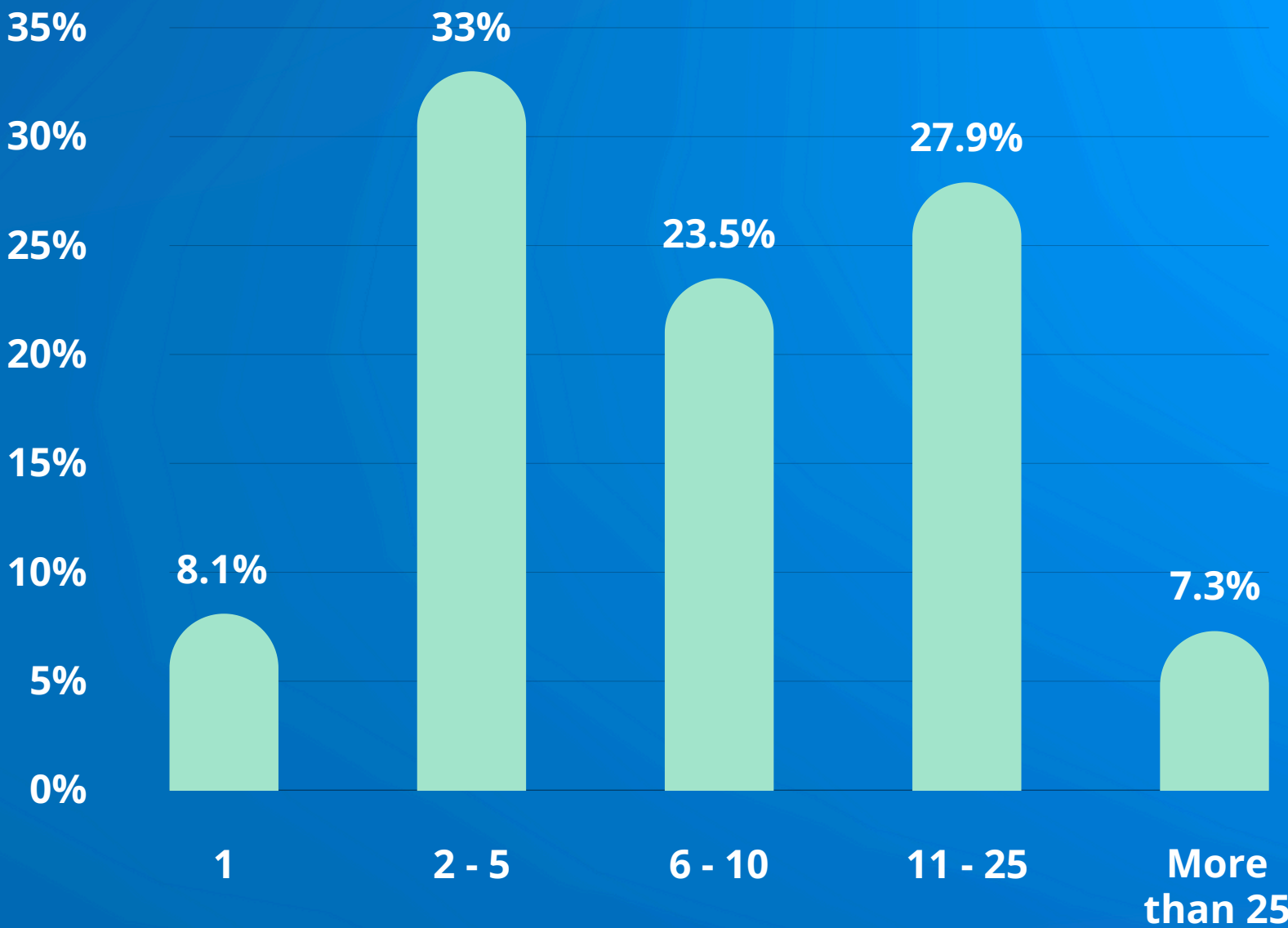
Note: A small percentage of respondents said they were 'Unsure' to this question.

Figure 5. Management complexity and resource strain increase as the number of providers goes up, yet the majority of enterprises are using a patchwork of providers to meet their business needs.

The primary reasons cited for selecting multiple providers at a time include coverage, cost optimization, and localized decisions on vendor selection (Figure 6).

For many companies, the lack of a single, comprehensive current solution forces them to engage with multiple vendors.

Respondents cited coverage as the top driver for choosing multiple providers in North America and Europe, whereas cost optimization and supporting legacy infrastructure were the primary considerations in the Asia-Pacific region.

In terms of provider selection, improving call quality stands out as the most important criterion, followed by better support capabilities and platform integrations.
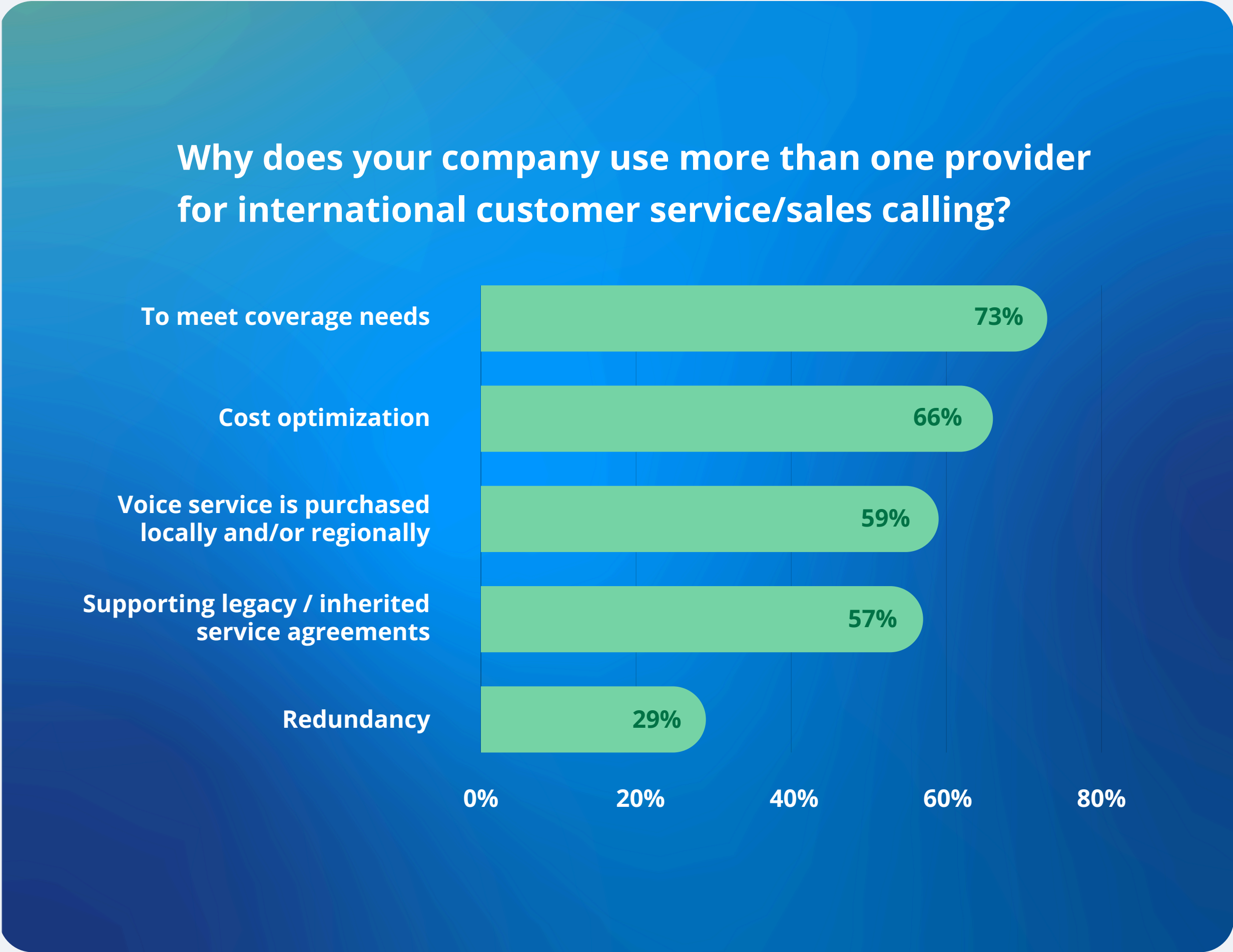

Why does your company use more than one provider for international customer service/sales calling?

To meet coverage needs	73%
Cost optimization	66%
Voice service is purchased locally and/or regionally	59%
Supporting legacy / inherited service agreements	57%
Redundancy	29%

Figure 6. Obtaining the necessary number coverage and optimizing costs are leading reasons why organizations use multiple providers for international voice services.

Is your company considering consolidating the number of voice services providers it uses for customer service/sales?

- 49%
- 41%
- 8%
- 2%

- Yes, we are actively consolidating
- We are evaluating our options
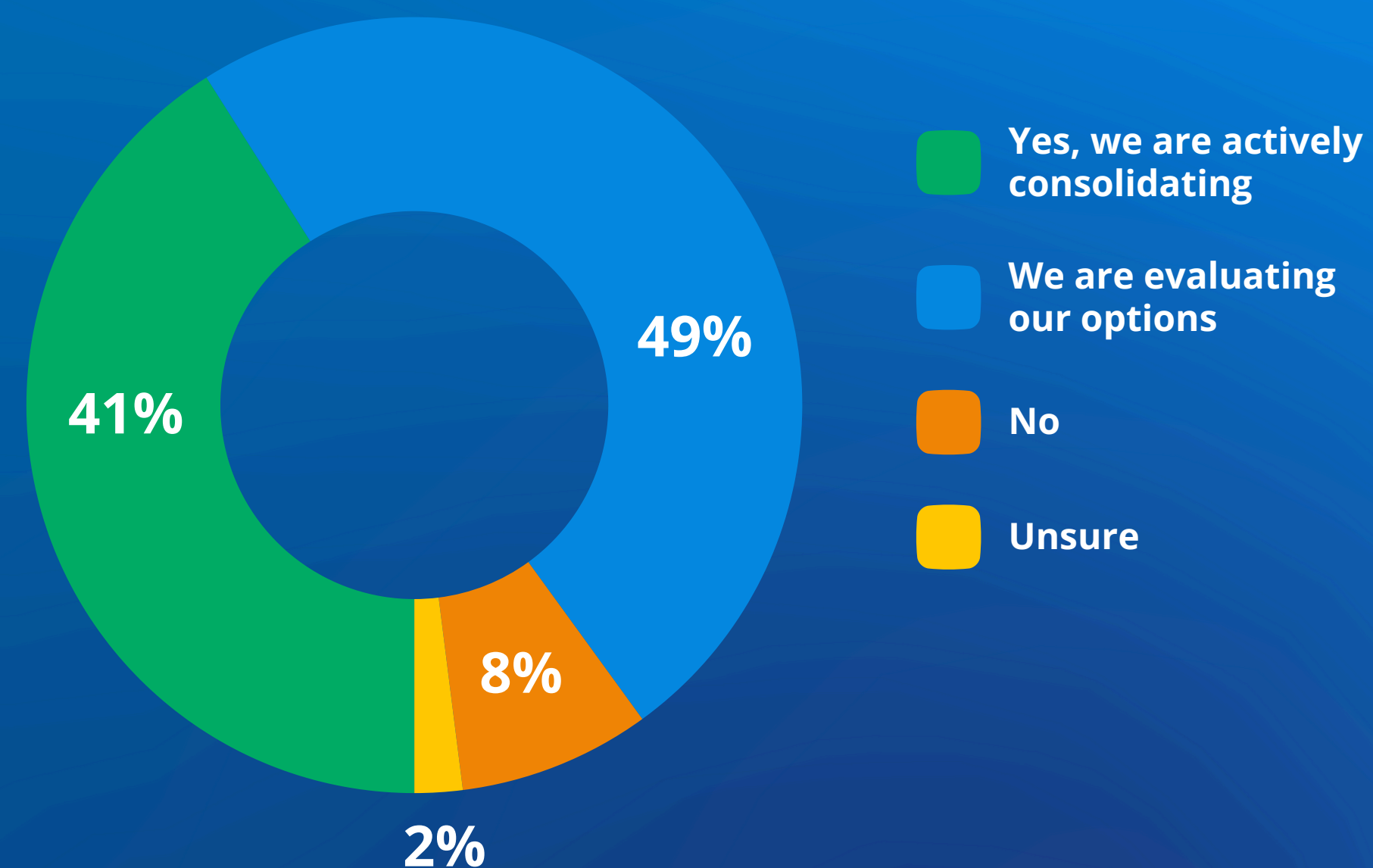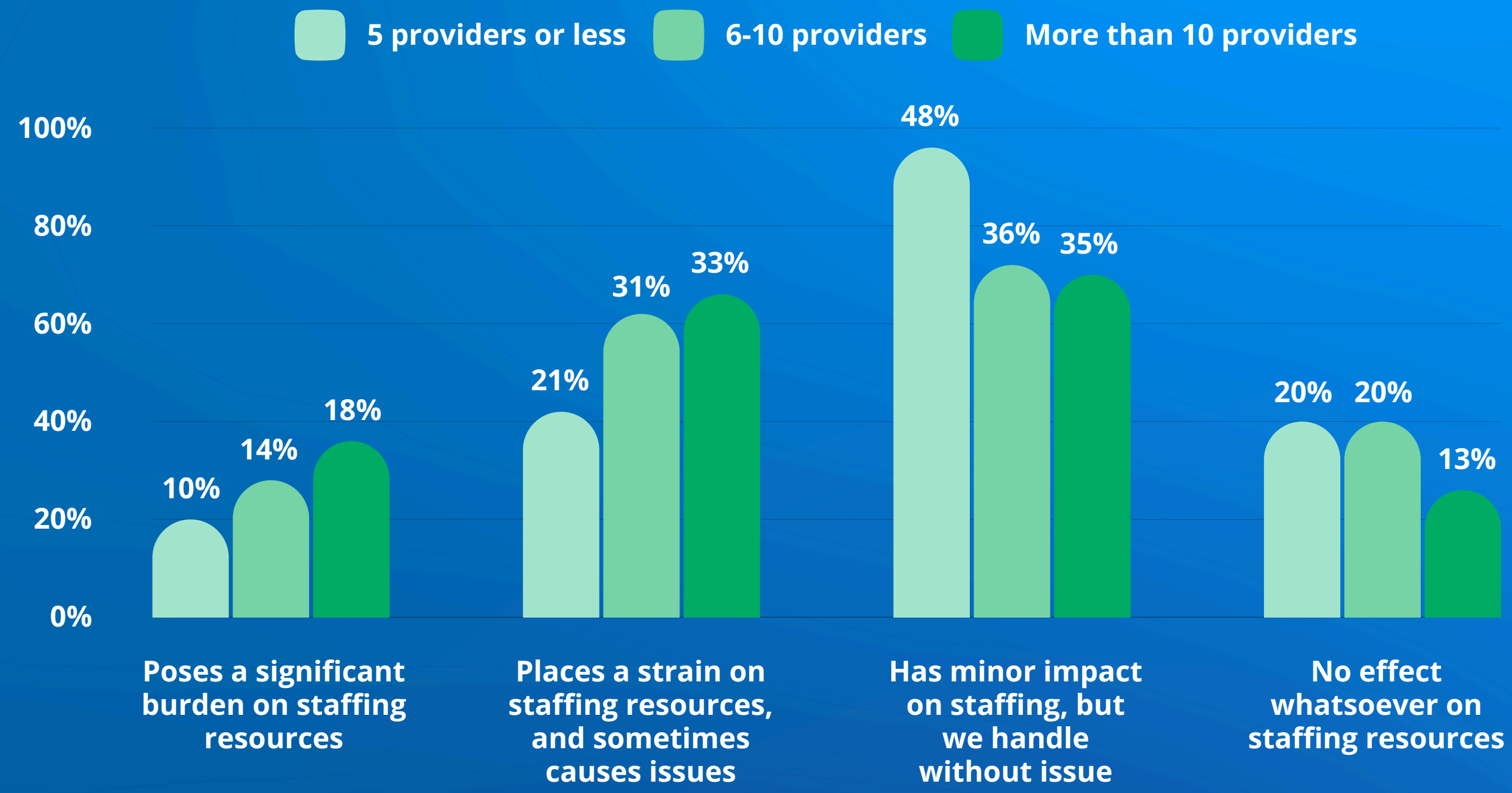- No
- Unsure

Figure 7. The vast majority of respondents are actively consolidating their voice providers or evaluating their options for consolidation.

As comprehensive, global solutions have emerged, companies are rethinking their approach. International voice platforms can provide organizations with the coverage and numbers they need, improved visibility and insights by aggregating data and analytics, and streamlined support to ensure improved quality.

41% of companies are actively consolidating their providers

A growing trend toward carrier consolidation is evident, as organizations seek to reduce the operational burden and improve their voice services. Currently, 41% of companies are actively consolidating their providers, while 49% are evaluating the possibility of consolidation (Figure 7).

Which best describes your company's ability to manage multiple voice services providers/carriers with its staffing resources (by number of providers)?

Legend:
- 5 providers or less
- 6-10 providers
- More than 10 providers

	Poses a significant burden on staffing resources	Places a strain on staffing resources, and sometimes causes issues	Has minor impact on staffing, but we handle without issue	No effect whatsoever on staffing resources
5 providers or less	10%	21%	48%	20%
6-10 providers	14%	31%	36%	20%
More than 10 providers	18%	33%	35%	13%

Note: A small percentage of respondents said they were 'Unsure' to this question.

Figure 8. Companies with more voice providers to manage are more likely to cite a strain on their resources, as shown in this breakdown of staffing resource burden by number of providers.

Managing multiple providers strains company resources and, the higher the number of providers, the bigger the impact on those resources.

Despite staffing up to handle these demands, more than 42% of respondents report issues with managing multiple service providers, with nearly 15% stating that this poses a significant burden on their operations (Figure 8). Those who report minimal issues have adapted to the situation despite its inherent challenges.

This shift to provider consolidation indicates a move toward more efficient and manageable voice service operations, aiming to alleviate the strain on staff and budget while improving service quality.

The Cloud Opportunity for Optimizing International Voice

The cloud presents a significant opportunity for companies looking to optimize their international voice services.

Currently, the majority – 57% – of respondents' customer service and sales calls are handled in the cloud, while about 43% still rely on on-premises infrastructure (Figure 9).

The trend is shifting toward even greater cloud adoption, with many companies planning to migrate more of their call handling to the cloud.

Over the next three years, it's projected that 63% of calls will be managed in the cloud.

The momentum toward cloud migration is growing stronger, with a notable increase in the number of companies planning to go 'all in' on cloud solutions.

Today, 12% of companies have 70% or more of their calls managed in the cloud. This figure is expected to rise to 30% within the next three years, indicating a substantial shift toward cloud-centric operations.
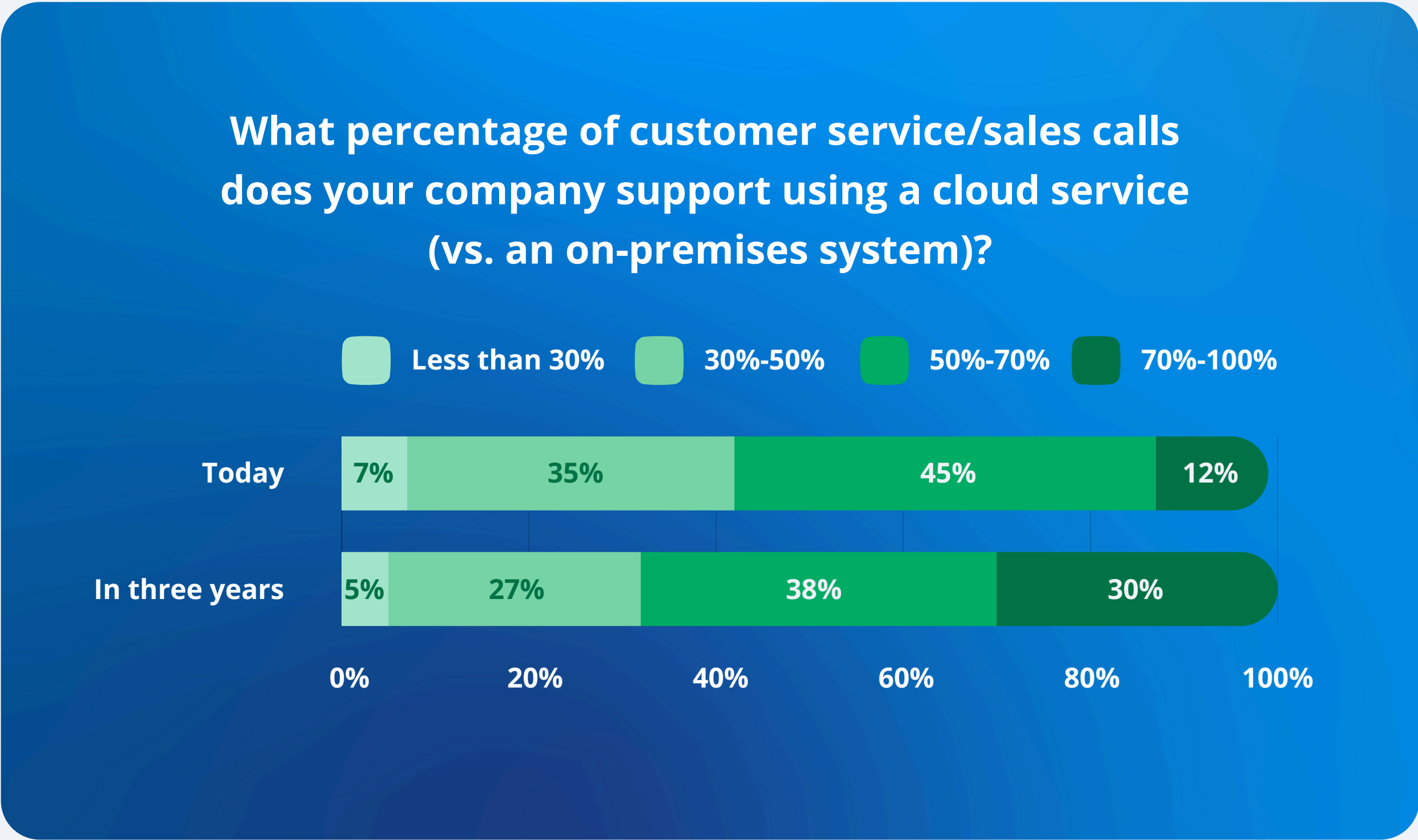

What percentage of customer service/sales calls does your company support using a cloud service (vs. an on-premises system)?

Legend: Less than 30% | 30%-50% | 50%-70% | 70%-100%

	Less than 30%	30%-50%	50%-70%	70%-100%
Today	7%	35%	45%	12%
In three years	5%	27%	38%	30%

0%   20%   40%   60%   80%   100%

Figure 9. The trend toward cloud voice now and three years from now is evident.

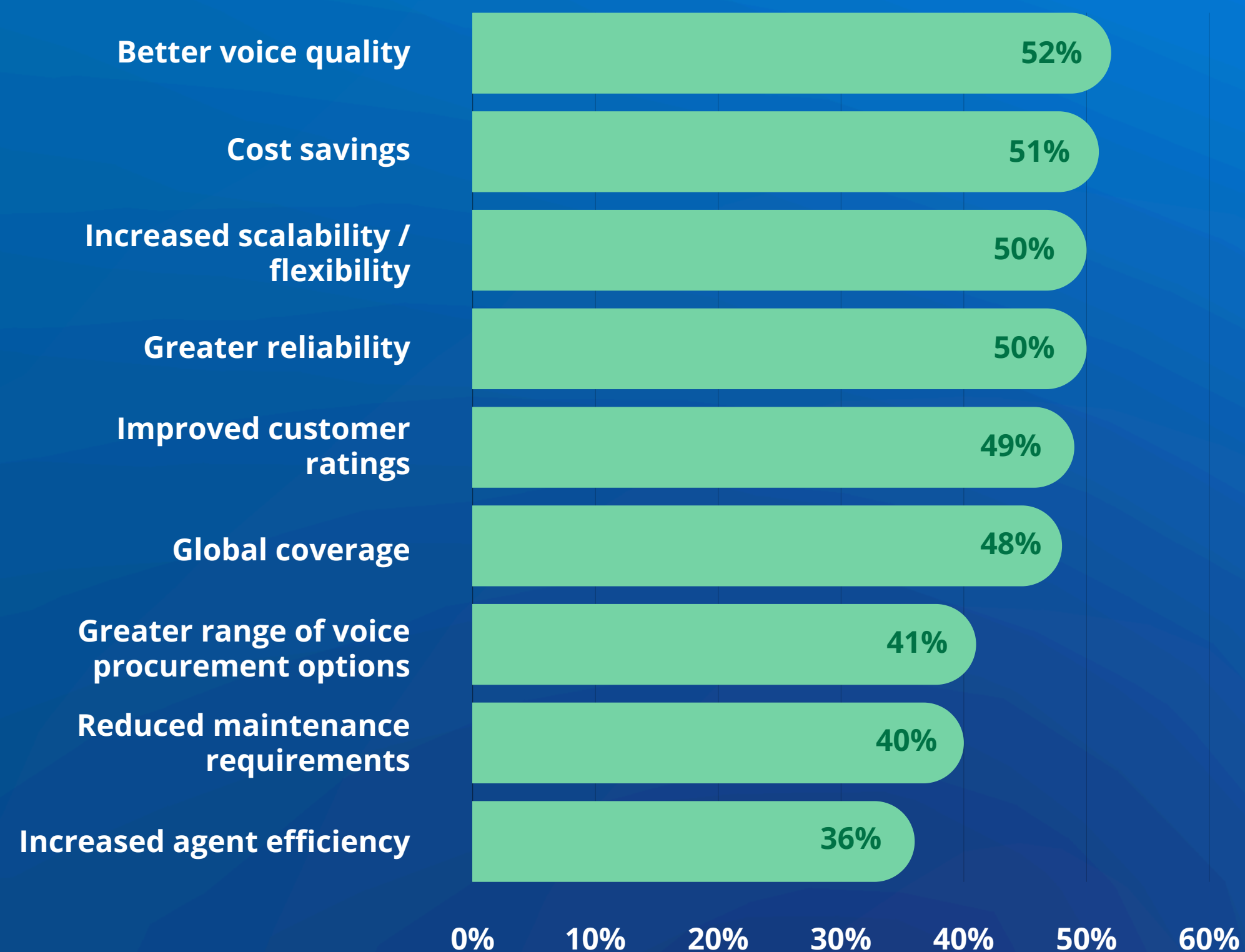## What benefits has your company realized in moving customer service/sales calling to the cloud?

Benefit	Percentage
Better voice quality	52%
Cost savings	51%
Increased scalability / flexibility	50%
Greater reliability	50%
Improved customer ratings	49%
Global coverage	48%
Greater range of voice procurement options	41%
Reduced maintenance requirements	40%
Increased agent efficiency	36%

Figure 10. Whether it's getting better voice quality and cost savings to obtaining global coverage, enterprises see several clear benefits to moving their customer service/sales calls to the cloud.

The benefits of moving customer service and sales calling to the cloud are evident, whether it's better voice quality and cost savings to increased global number coverage (Figure 10) . Regionally, there are some variations in the top benefits, with North American and European companies realizing significant improvements in quality of service and reliability. These enhancements are critical for maintaining high levels of customer satisfaction and operational efficiency.

> ## " We wanted a modern phone system, with modern capabilities.
> – IT Leader, Engineering Firm

Meanwhile, in the Asia-Pacific region, the primary driver for cloud migration is the potential to lower the total cost of ownership. By reducing the need for expensive on-premises infrastructure and maintenance, companies can achieve cost savings while benefiting from the scalability and flexibility of cloud solutions.

Overall, the move to the cloud is seen as a strategic initiative to optimize international voice services. As companies continue to migrate more of their voice infrastructure to the cloud, they are likely to experience enhanced service quality, increased reliability, and reduced costs, better positioning them to meet the demands of a global customer base.

> **Cloud platforms have been very reliable. They have good uptime—and when things do go down, they're fairly transparent. Plus, we don't have to worry about managing carrier interactions, so that's one less thing to worry about.**
>
> – IT Leader, Engineering Firm

Growing Adoption of AI for Voice

The adoption of AI for voice channels is experiencing significant growth, reflecting its crucial role in enhancing customer service and sales operations.

Nearly 94% of companies are already using or evaluating AI for their voice channels, with 58% actively integrating AI into their voice operations (Figure 11).

This widespread adoption highlights the recognition of AI's potential to transform how companies manage and optimize their voice interactions within the contact center.

There is a global movement toward AI-enhanced voice services, with North American respondents reporting active use of AI in their voice channels (64%), and Asia-Pacific (APAC) and European regions are not far behind. This widespread interest and investment in AI underscores its perceived value across diverse markets and industries.
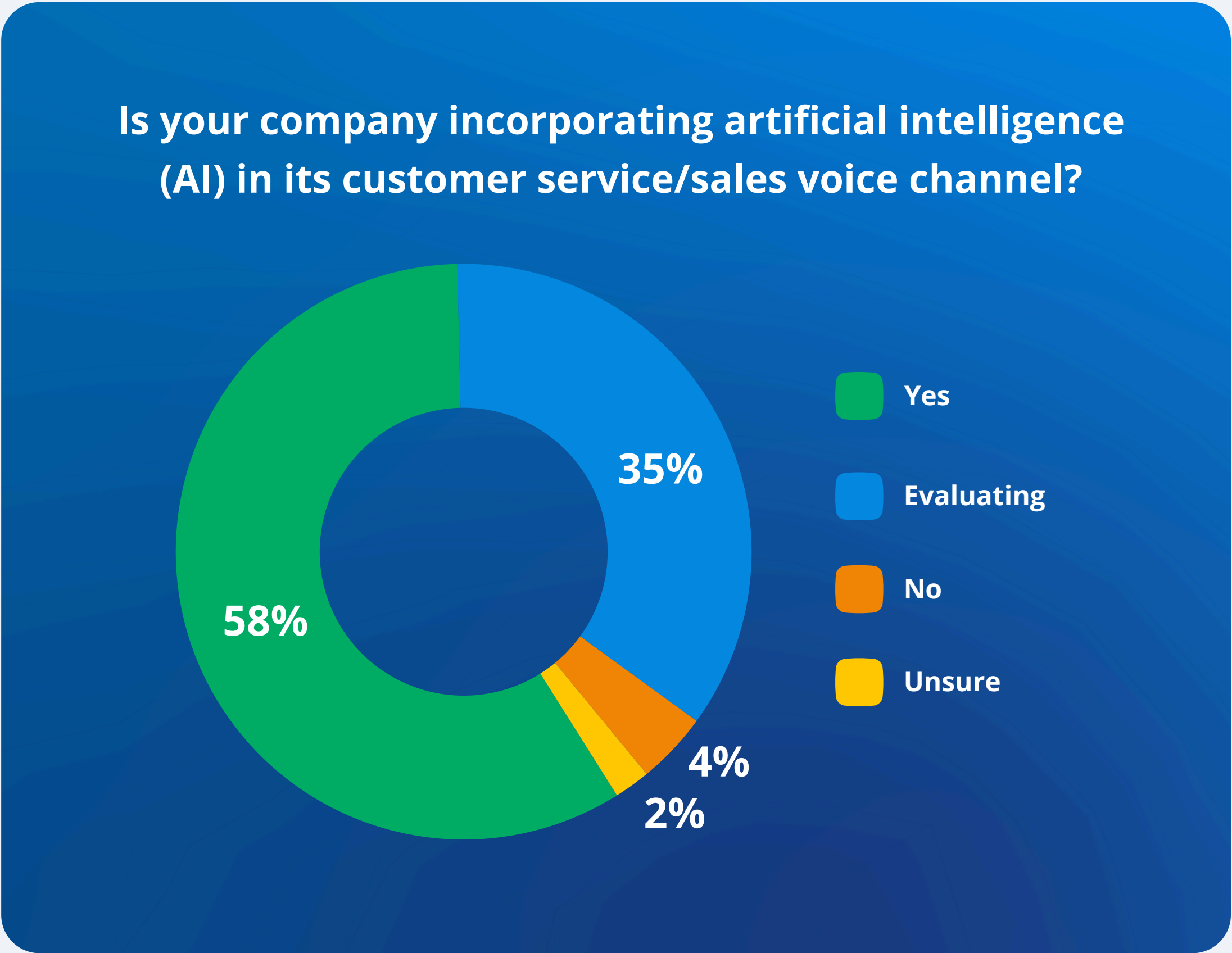
Is your company incorporating artificial intelligence (AI) in its customer service/sales voice channel?

- Yes — 58%
- Evaluating — 35%
- No — 4%
- Unsure — 2%

Figure 11. A staggering majority of companies are either actively implementing AI into their voice channel or evaluating its use.

64% of North American respondents report active use of AI in their voice channels with Asia-Pacific and Europe not far behind, underscoring its perceived value across diverse markets and industries.

The primary use cases for voice AI include conversational AI (voicebots) as noted by 74% of respondents and agent assist capabilities (67% of respondents), which help automate interactions and provide real-time support to human agents (Figure 12).

These technologies are followed by call routing and caller verification, which optimize call paths and enhance security. By leveraging these AI capabilities, companies can streamline their voice operations, ensuring that customers are connected to the right resources quickly and securely.

How is your company incorporating AI in its customer service/sales voice channel?

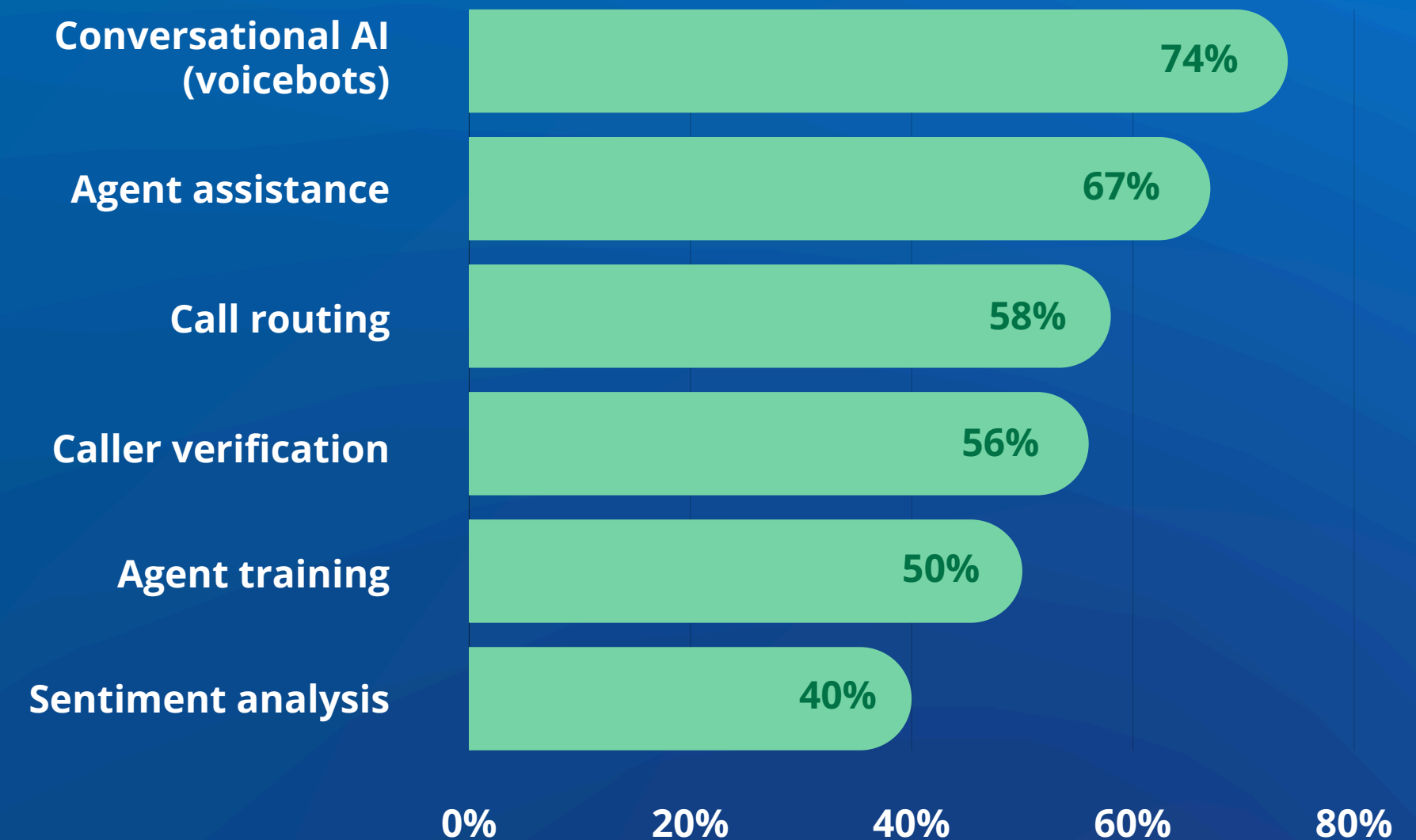| Use case	Percentage
Conversational AI (voicebots)	74%
Agent assistance	67%
Call routing	58%
Caller verification	56%
Agent training	50%
Sentiment analysis	40%

Figure 12. Conversational AI and agent assistance are the leading use cases for AI in the voice channel, but companies are also incorporating AI for call routing, caller verification and more.

The benefits of AI in the voice channel are potentially substantial. Improved customer satisfaction, as measured by enhanced customer ratings, stands out as a significant expected advantage, with 69% of respondents anticipating its benefits (Figure 13). AI can provide faster, more accurate responses to customer inquiries, leading to higher satisfaction levels.
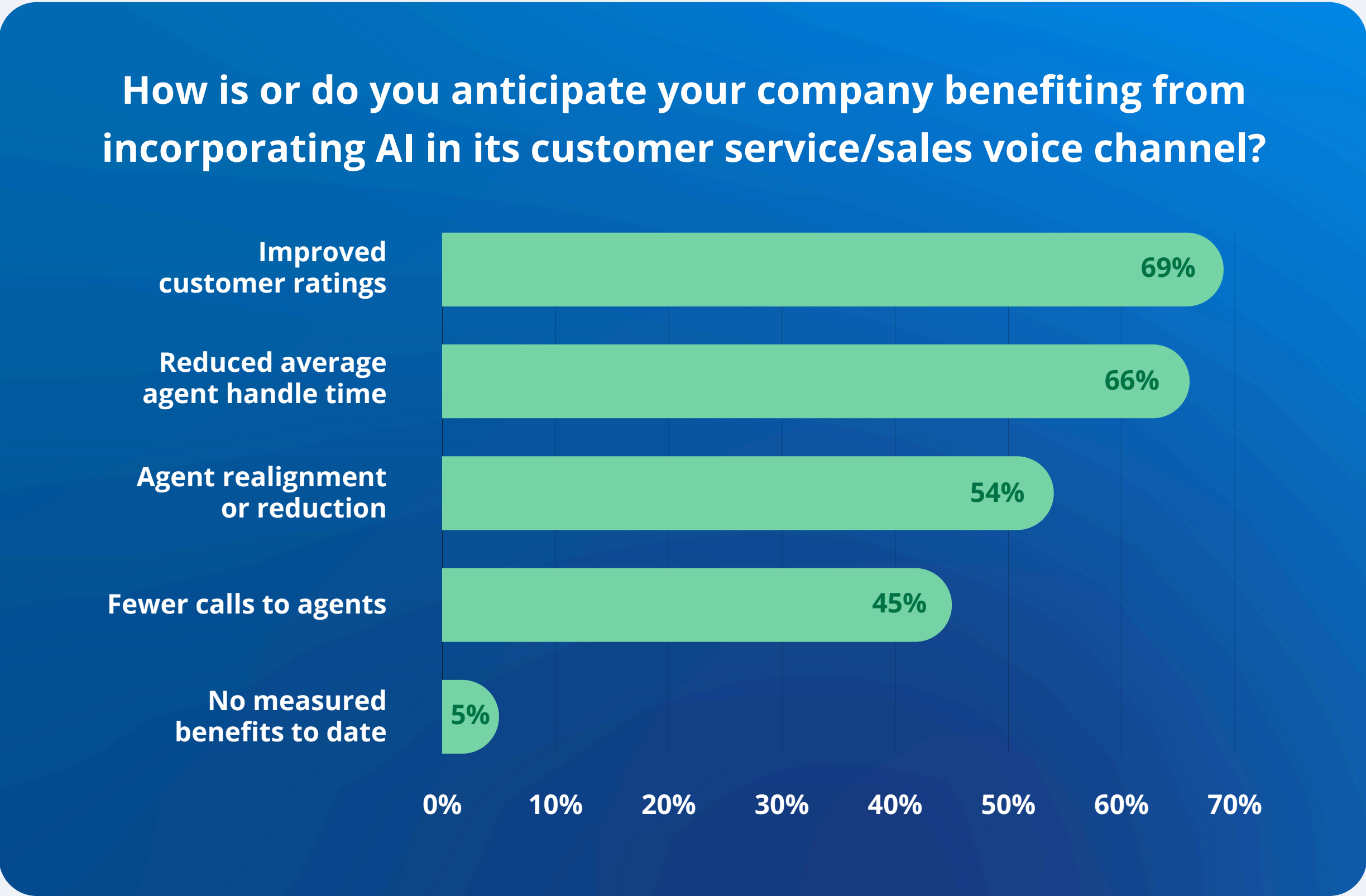
Additionally, AI helps reduce agent handle time by automating routine tasks and providing agents with relevant information and suggestions during calls. This efficiency gain allows agents to focus on more complex issues, improving overall service quality and operational effectiveness.

To summarize, the adoption of AI for voice channels is rapidly growing, driven by its ability to enhance customer satisfaction and operational efficiency. As companies continue to integrate AI into their voice operations, they are likely to see significant improvements in service quality, security, and overall performance.

How is or do you anticipate your company benefiting from incorporating AI in its customer service/sales voice channel?

Benefit	Percentage
Improved customer ratings	69%
Reduced average agent handle time	66%
Agent realignment or reduction	54%
Fewer calls to agents	45%
No measured benefits to date	5%

Figure 13. Enterprises are already seeing, or anticipate seeing, clear benefits from AI in the voice channel, including improved customer ratings and reduced agent handle time, as well as fewer calls to agents overall.

This report has highlighted a variety of critical topics

including provider fragmentation, the growing trend toward cloud migration, and the rapid adoption of AI technologies in voice channels. **As we summarize the findings, here are some key takeaways:**

Provider Fragmentation and Consolidation

Widespread Use of Multiple Providers
92% of companies use more than one provider for international contact center voice services, driven by the need for comprehensive coverage, cost optimization, and local vendor preferences.

Operational Strain
Managing multiple providers strains resources and complicates operations.

Trend Toward Consolidation
To streamline operations, reduce costs, and alleviate staff burden, 90% of companies are moving toward or evaluating carrier consolidation.
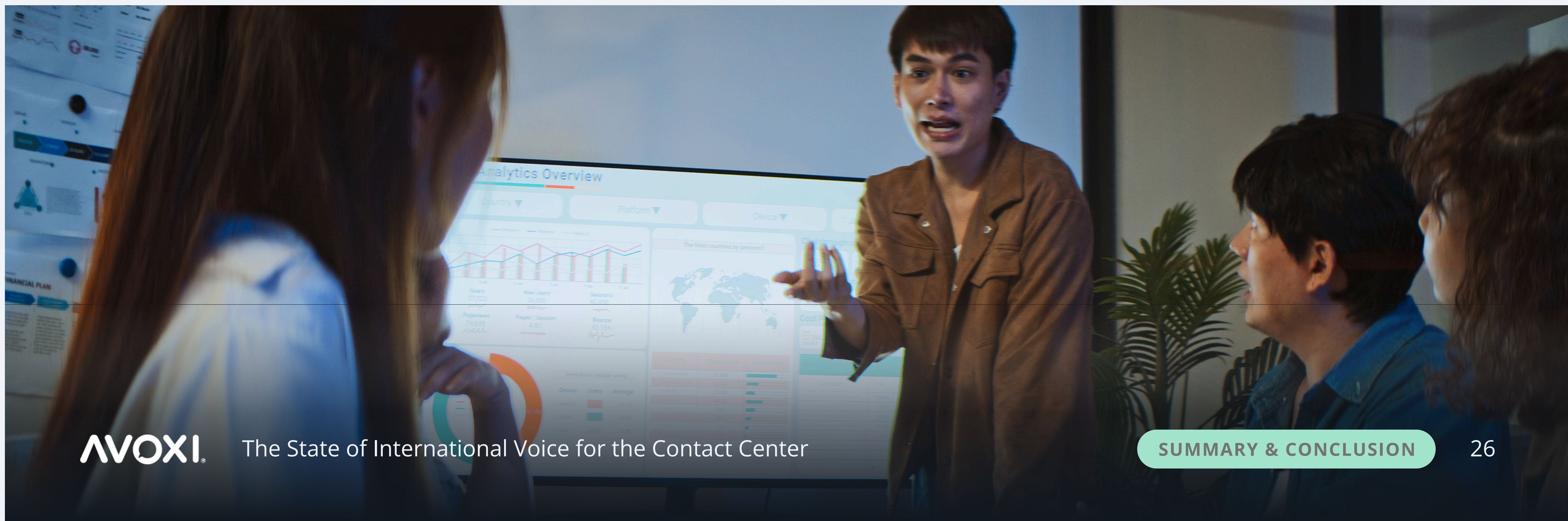
Cloud Migration

Growing Adoption

Currently, 56% of customer service and sales calls are handled in the cloud, expected to rise to 63% within three years.

Regional Benefits

Companies, especially in North America, Europe, and APAC, recognize cloud migration for its improved service quality, reliability, and cost savings.

AI for Voice

Rapid Expansion
94% of companies are using or evaluating AI technologies for voice channels.

Key AI Applications
Conversational AI (voicebots), agent assist capabilities, call routing, and caller verification are leading use cases.

Significant Benefits
AI enhances customer satisfaction, reduces agent handle time, and improves operational efficiency, offering substantial value to organizations globally.
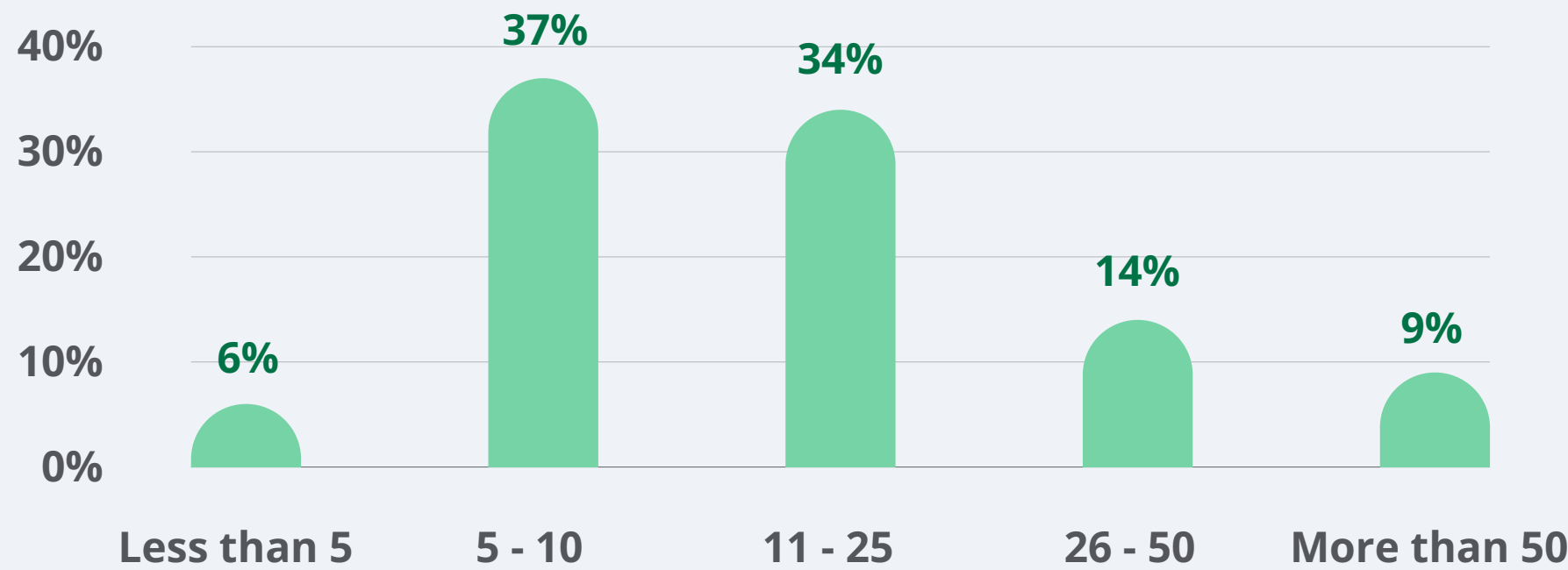
ABOUT THE RESPONDENTS

This survey was conducted among IT and voice decision makers at the manager, director, VP and executive level, across 11 countries and 18 industries.
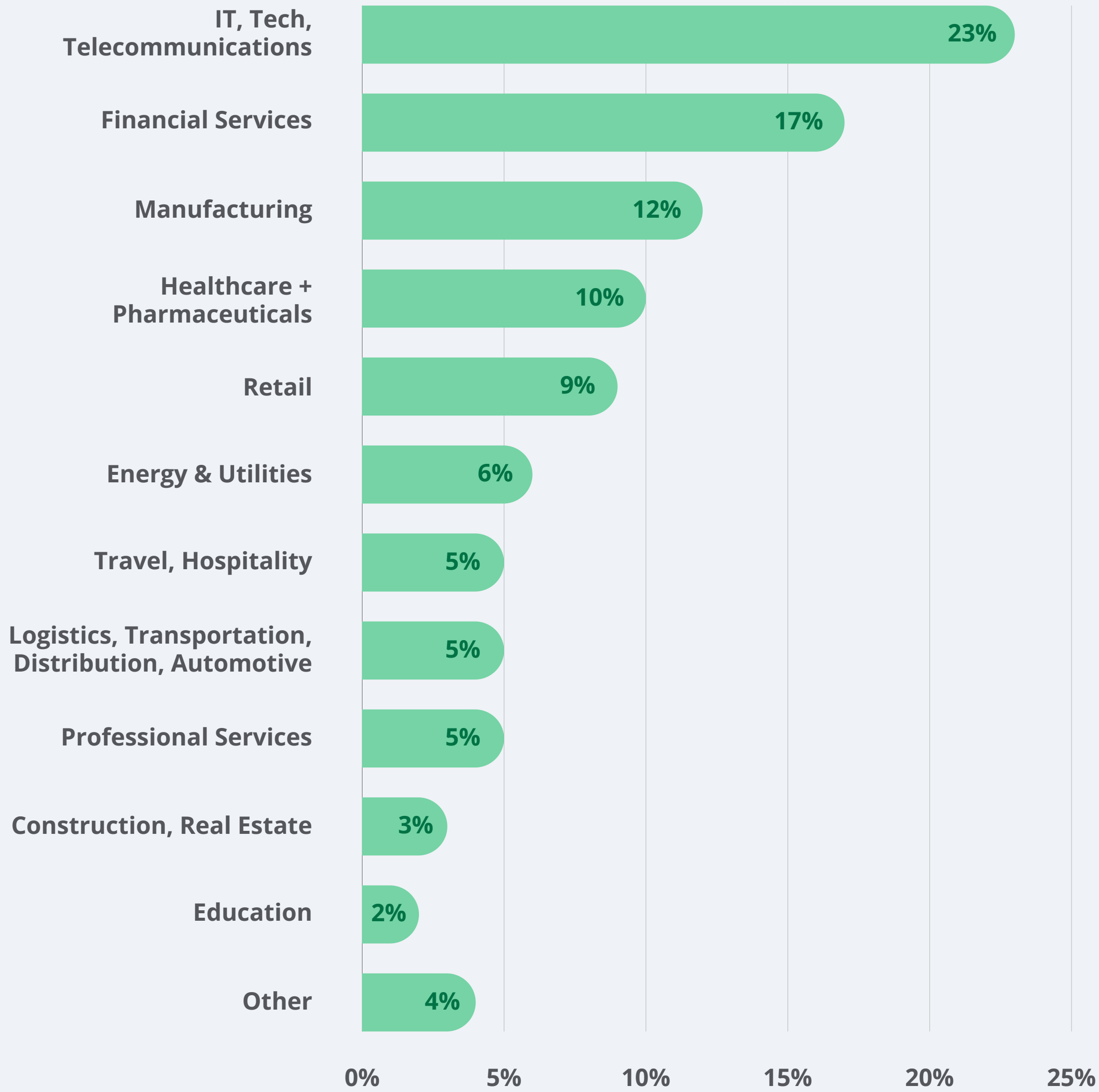
Number of Respondents **371**

Number of Countries of Operation

In how many countries does your company directly serve customers?

Less than 5	5 - 10	11 - 25	26 - 50	More than 50
6%	37%	34%	14%	9%

Participants by Industry

Industry	%
IT, Tech, Telecommunications	23%
Financial Services	17%
Manufacturing	12%
Healthcare + Pharmaceuticals	10%
Retail	9%
Energy & Utilities	6%
Travel, Hospitality	5%
Logistics, Transportation, Distribution, Automotive	5%
Professional Services	5%
Construction, Real Estate	3%
Education	2%
Other	4%

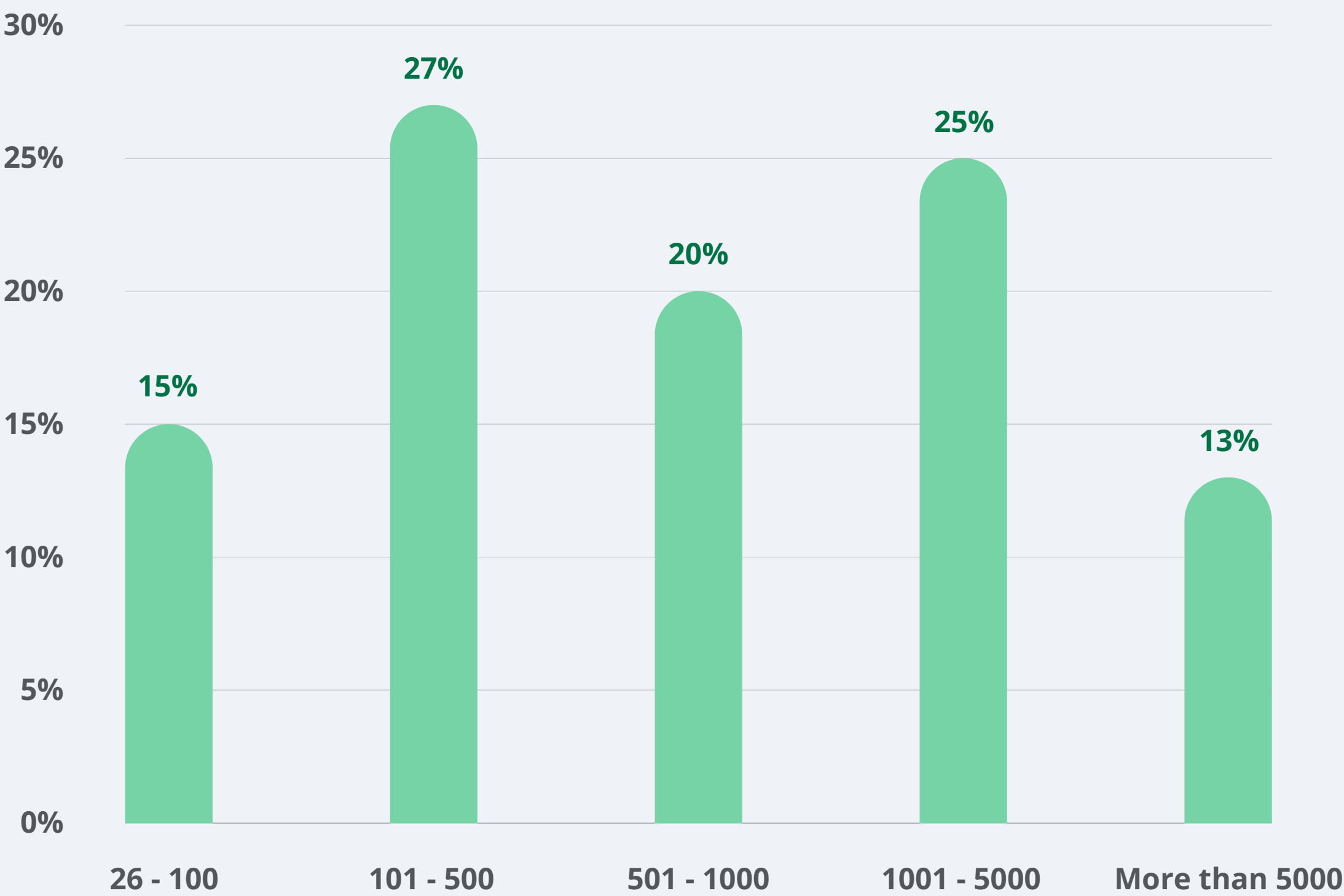## Participants by Contact Center Size

How many contact center agents or other customer service/sales agents does your company employ worldwide?

FINAL THOUGHTS

As multinational enterprises navigate the complexities of optimizing their international voice services for their contact centers, strategic investments in cloud and AI technologies are proving essential.

By addressing the critical challenges of provider consolidation, security, and global coverage and then leveraging the opportunities presented by these technologies, companies can enhance their customer service and sales channels, achieving greater efficiency, reliability, and customer satisfaction.

ABOUT AVOXI

AVOXI delivers a new generation of international cloud voice solutions to companies that need to easily connect and converse with their customers. With unmatched depth and breadth of global coverage and virtual number types, and a software platform that provides visibility and intelligence to manage voice service like never before, AVOXI's 5000+ clients are able to more effectively use voice to serve customers across geographic markets as part of a modern contact center approach. AVOXI's global team of cloud voice experts prides itself on ensuring clients receive the highest level of service possible – anywhere and anytime.

✉ **salesteam@avoxi.com**

📞 **+1 (770) 937-9735**

AVOXI.com

300 Galleria Pkwy SE, Ste 610
Atlanta, GA 30339

ABOUT metrigy

Metrigy is an innovative research and advisory firm focusing on the rapidly changing areas of workplace collaboration, digital workplace, digital transformation, customer experience, and employee experience—along with several related technologies. Metrigy delivers strategic guidance and informative content, backed by primary research metrics and analysis, for technology providers and enterprise organizations.