AVOXI

2025 EDITION

The State of International Voice for the Contact Center

Navigating Cloud, AI, and Providers in Global Voice Strategy

In collaboration with
metrigy

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ABOUT THIS REPORT

The State of International Voice for the Contact Center is the second annual industry benchmark study examining how global enterprises deploy, manage, and modernize their voice strategies in an increasingly cloud-driven, AI-enabled, and compliance-focused environment.

Based on research conducted by Metrigy through a survey of 365 IT, contact center, and CX leaders worldwide, the report provides a comprehensive view of current solution models, vendor preferences, and the technology shifts shaping international voice. It is designed to help decision makers evaluate their current strategies, identify improvement opportunities, and plan for the next phase of voice transformation.

This report covers critical topics including:

- **Software and Voice Deployment Models:** How organizations balance cloud, on-premises, and hybrid environments for both contact center and unified communications software, alongside the critical voice infrastructure supporting these environments.
- **Vendor Strategy and Consolidation:** The amount of providers companies work with today and how consolidation is being used to improve quality, support and efficiency.
- **Bundling Versus Unbundling:** The types of offers and providers companies select for their voice services and how this is expected to evolve.
- **Regulatory Compliance:** How companies navigate complex global requirements, the most pressing compliance challenges, and the role of providers in reducing risk.
- **AI in Voice Systems:** Adoption rates, leading implementation methods, top use cases, and how organizations are measuring AI outcomes.

Together, these insights provide a clear, data-backed understanding of where the industry stands today, where it is headed, and the strategic choices enterprises must make to stay competitive in a global, fast-changing communications landscape.

LETTER FROM OUR CEO

In the always-changing contact center, the only constant is voice.

Why? Voice remains the most effective way to resolve urgent and complex issues—and is the preferred method for both customers and agents.

Voice delivers immediacy, clarity, and trust in ways that digital channels cannot. That's why it is a premium channel that drives meaningful customer interactions.

This year's **State of International Voice for the Contact Center** report highlights how organizations are adapting their voice strategies amid ongoing change. The presence of AI is accelerating. Cloud-based solutions now support the majority of contact center calls, yet most enterprises still maintain legacy on-premise infrastructure. Security and fraud prevention, along with voice quality and coverage, remain top challenges. And while many companies currently rely on their CCaaS platform for voice service, the majority are re-evaluating this approach in pursuit of better coverage, higher quality, and more control.

At AVOXI, we continue to deliver software to enhance the global coverage, performance, and flexibility required by today's enterprise contact centers. This report—developed in partnership with Metrigy—was created to provide data-driven insights into how multinational organizations are managing voice across regions, systems, and providers.

We're proud to bring you this second edition of the State of International Voice for the Contact Center, with benchmarking data aimed at helping you navigate evolving requirements and opportunities in voice communications.

Warm Regards,

Barbara Dondiego

Barbara Dondiego,
CEO AVOXI

EXECUTIVE SUMMARY

The second annual State of International Voice for the Contact Center reveals a global market in the midst of transformation, but also one with a clear direction. Organizations are steadily moving toward cloud-based models, consolidating providers, and integrating AI into voice operations—while balancing the realities of hybrid environments, complex compliance demands, and evolving customer expectations. Drawing on insights from IT, contact center, and CX leaders worldwide, this report highlights the deployment models, provider strategies, and technology trends shaping the future of international voice.

KEY FINDINGS

Deployment Models: Hybrid remains the most common approach for both Contact Center Software (CCaaS) and Unified Communications Software (UCaaS), with more than 80% of organizations leveraging cloud in some form and over 60% still maintaining on-premises systems.

Contact Center Vendor Preferences: CCaaS is the most-used provider type for global voice, yet 71% of organizations plan to change their preferred voice provider type —driven by the need for better global coverage and higher service quality. Nearly 40% expect to move to a global provider that is directly focused on voice.

Enterprise Communication Voice Preferences: 72% use the same provider for UCaaS and CCaaS to simplify integration, yet voice services are sourced from a mix of UCaaS providers, telecom carriers, and specialty voice partners. One-third expect to shift to a specialty voice provider to gain greater control and better AI integration.

Vendor Consolidation: More than 96% use more than one voice provider, and nearly all are actively consolidating or considering it—primarily to improve call quality and support.

Regulatory Compliance: Compliance management is handled through a mix of internal resources, legal specialists, third-party experts, and provider guidance. The biggest challenges are keeping up with regulatory changes, knowing which rules apply, and adhering to them across markets.

AI Adoption: 81% have AI-enabled voice systems, using them for customer self-service, optimized routing, and agent assistance. While 92% measure AI outcomes, quality and security of AI output remain top concerns.

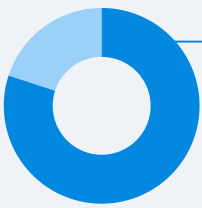
The Bottom Line

Global voice strategies are shifting toward cloud-first, AI-ready, and provider-consolidated models—supported by platforms and partners that can deliver reliability, global reach, integration flexibility, and regulatory expertise. The organizations that succeed will be those that align technology decisions with long-term business goals while building in the agility to adapt to changing customer, market, and compliance demands.

Persistent Challenges in International Voice

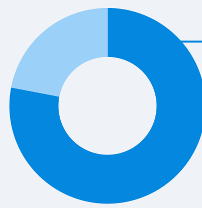
This year's results confirm that the most pressing challenges identified in last year's report—security, data privacy, coverage and call quality—remain firmly at the top of the list. These results illustrate they are near-universal pain points for multinational enterprises.

Security



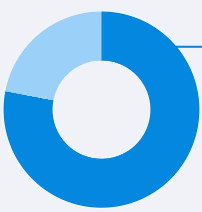
80%
say ensuring secure communications is a major challenge, underscoring the continued risks of breaches and fraud in global voice systems.

Fraud Prevention



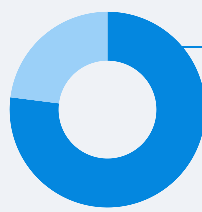
78%
Closely connected to security, 78% struggle to minimize fraud, highlighting the need for providers that deliver enterprise-grade protection and proactive monitoring.

Coverage



78%
report significant challenges in obtaining the geographic coverage they need, reflecting the complexity of supporting voice at scale across multiple regions.

Call Quality



77%
cite difficulty in consistently achieving high-quality voice, emphasizing that reliability and clarity remain critical to customer experience and brand trust.

Additional concerns:

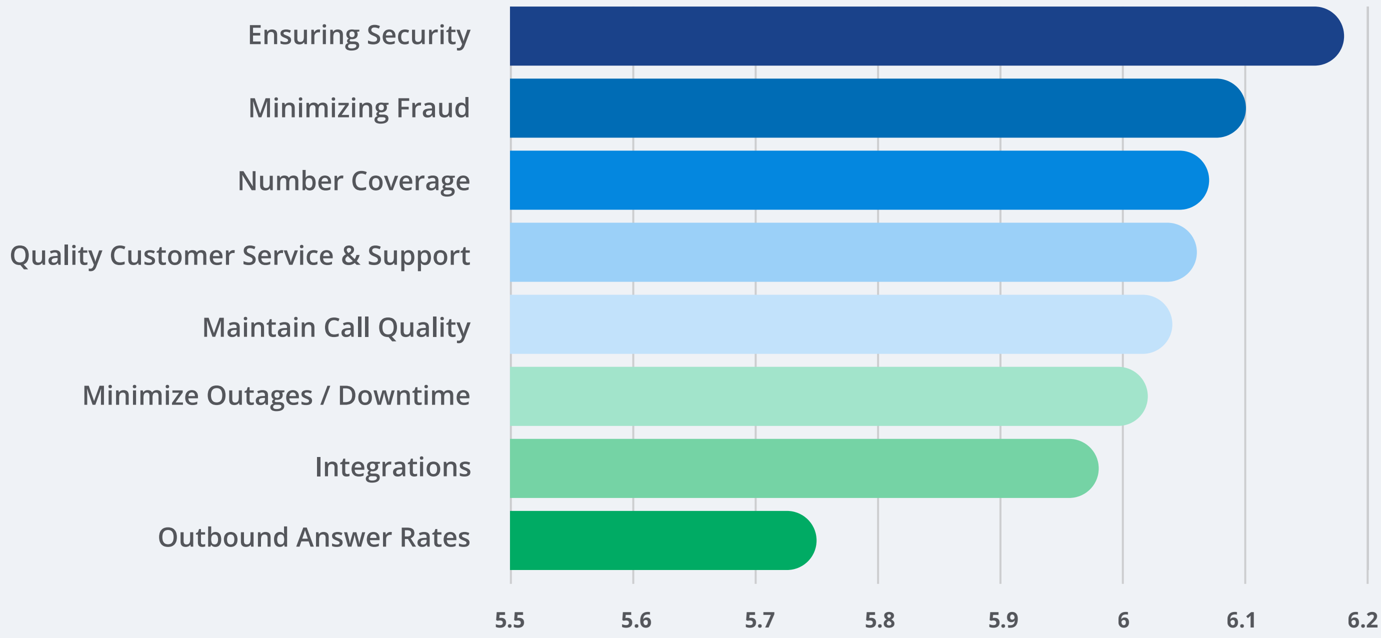
- Reliability
- Integrations
- Global Reach

These remain important, **particularly as hybrid and multi-provider environments** increase complexity.

The impact is most acute for larger, more global organizations, where scaling operations across dozens of countries amplifies risks and magnifies the cost of outages.

Downtime remains a critical concern, with enterprises seeking providers that can deliver resilience and proactive service assurance to minimize disruptions.

How would your company rate the significance of the following challenges around international customer service / sales calling?



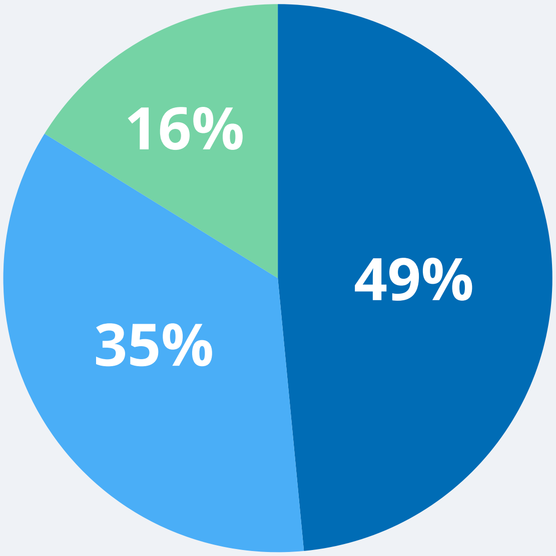
Contact Center Software and Voice Deployment Models

A helpful starting point for understanding the state of international voice in the contact center begins with how companies are selecting and deploying their contact center software and how voice purchasing decisions are evolving.

Contact center software remains a mix of cloud and on-premises infrastructure, with hybrid approaches continuing to dominate. **Nearly half of organizations (49%) operate in a hybrid model**—blending on-premises systems with cloud-based capabilities—while just over a third (35%) are fully cloud-deployed.

Taken together, 84% of companies have at least some portion of their contact center in the cloud, reflecting the ongoing shift toward flexible, scalable platforms. However, on-premises systems remain entrenched, with 65% of organizations still maintaining them in some capacity.

Which best describes the primary deployment model for your company's contact center solution?

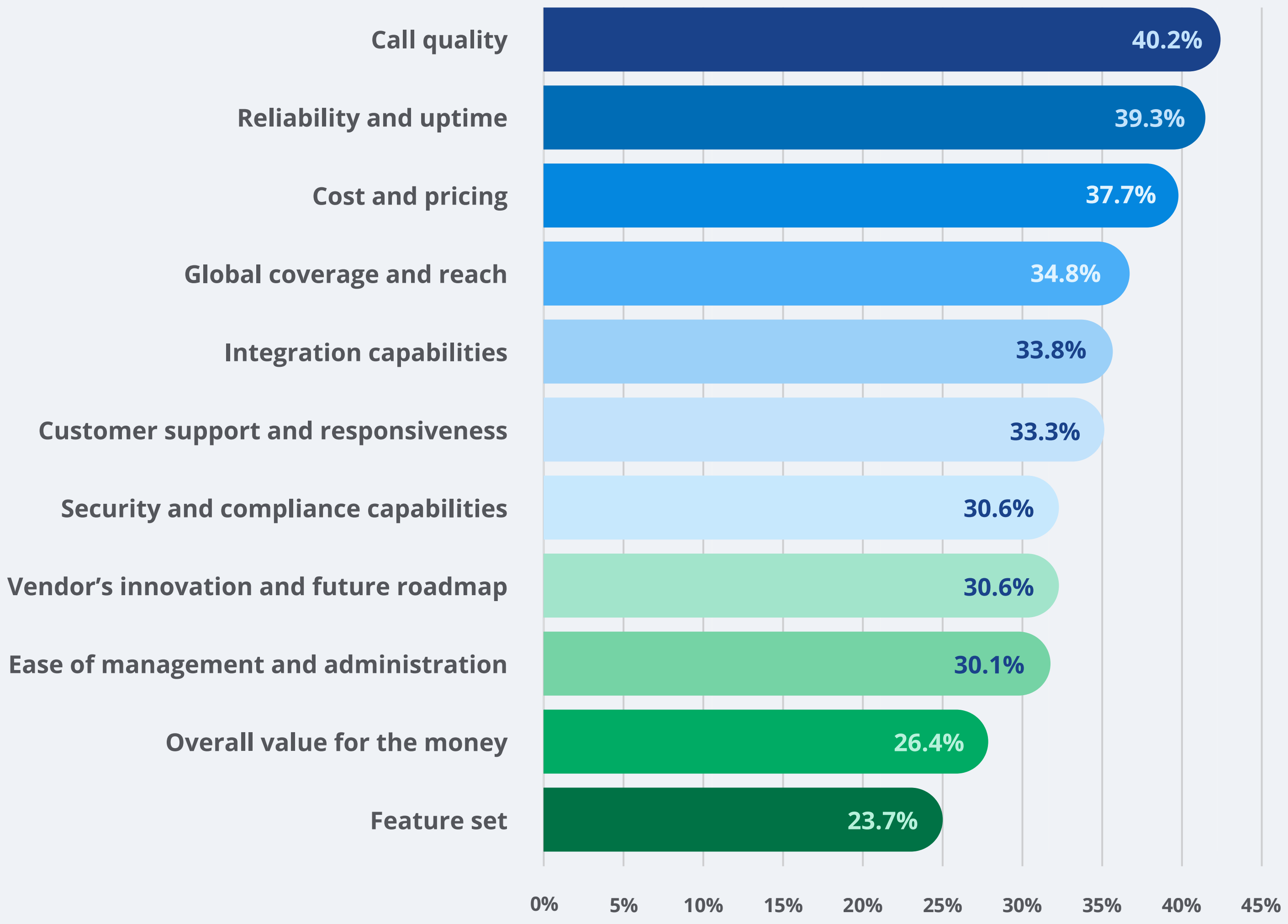


- **Hybrid of cloud and on-premises**
- **Fully deployed in the cloud** (contact center as a service, or CCaaS)
- **Fully deployed on-premises** (on internal or dedicated hosted servers)

84% in total use cloud

65% in total use on-premises

Top Factors Influencing Satisfaction with Primary Contact Center Platform



When evaluated against all capabilities, satisfaction with CCaaS platforms is driven primarily by voice performance. **Call quality (40%) and reliability/uptime (39%) are the top factors influencing satisfaction**, underscoring the critical role voice plays in global customer engagement.

As organizations evaluate future vendor strategies, the ability to construct a high-quality, reliable voice solution—across geographies and deployment models— will remain a decisive factor.

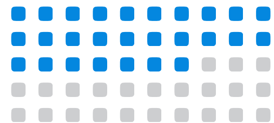
Voice Partner Purchasing Outlook

The momentum toward cloud-based voice continues to strengthen, building on last year's trend. Survey respondents indicated **54% of contact center calls were handled in the cloud and 47% on-prem**, with projections pointing to small but steady gains of up to 56% of calls handled in the cloud within three years.

Voice infrastructure will need to account for a wide range of cloud and on-premises hardware and software solutions in the near-to-mid-term.

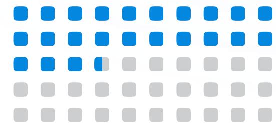
Survey respondents indicated

54%
of contact center calls



were handled in the cloud

47%
of contact center calls



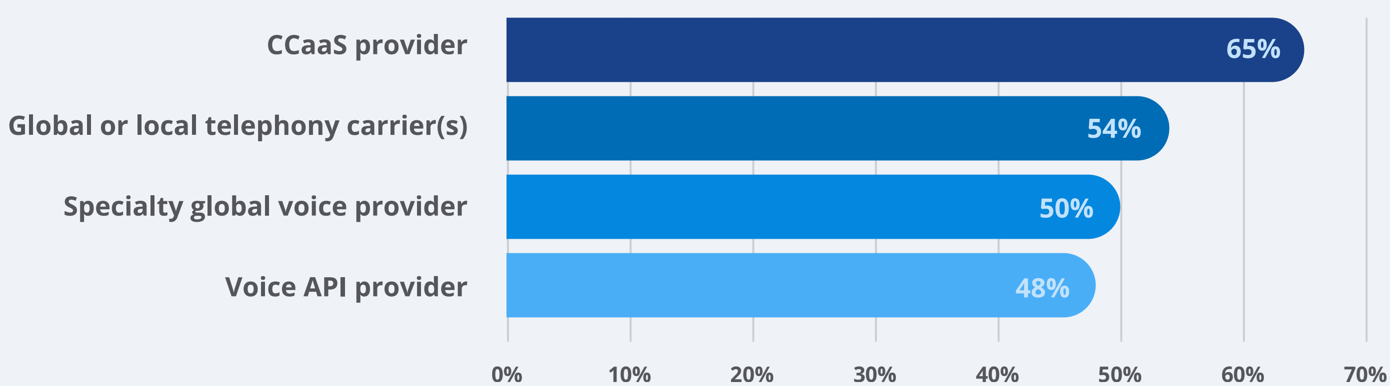
were handled on-premises

with projections of steady gains up to

56% of contact center calls **handled in the cloud within 3 years.**

Contact center providers are also the most widely used to support global voice calling, with 65% of organizations leveraging them either fully or with other types of vendors. This–along with the previously noted importance of voice with contact center vendor satisfaction–shows that voice and contact center software purchasing is closely linked today.

Which type or types of providers does your company use to support global voice calling for the contact center?



Voice Partner Purchasing Outlook

That preference, however, is poised for significant change. Within the next one to two years, **71% of companies expect to shift their preferred provider type**—most often in search of better global voice coverage (60%) and higher quality service (57%).

Within the next one to two years,

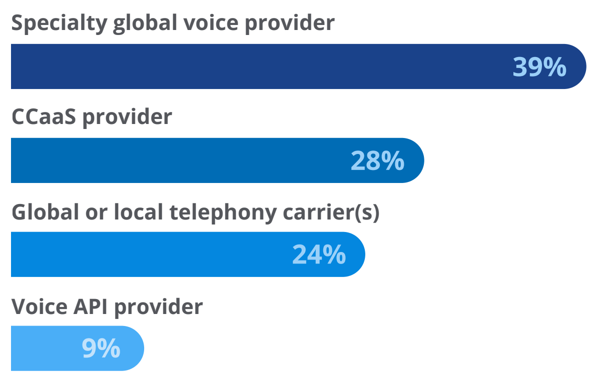
71% of companies surveyed **expect to shift their preferred provider type**

60%
need better global voice coverage

57%
need higher quality service

Of those that plan to switch, 40% expect to move to a specialty global voice provider, drawn by their ability to deliver broader geographic reach, a wider variety of number types, and deep expertise in voice infrastructure, regulatory compliance, and specialized support. In fact, specialty voice providers was selected by more respondents than any of the other options: CCaaS provider (28%), global/local telephony carrier (24%), voice API provider (9%).

Nearly **40%** of companies surveyed **plan to move to a specialty global voice provider**



For voice-first contact centers, this specialized expertise can be the difference between delivering consistent, high-quality customer experiences and facing costly service disruptions.

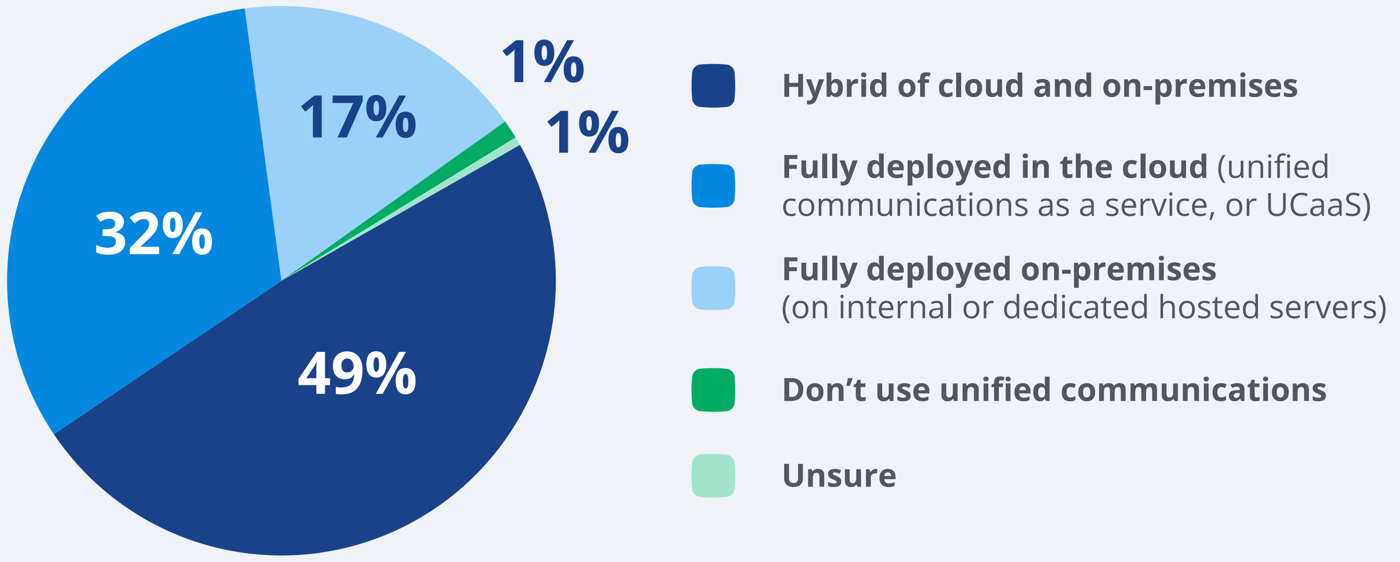
In addition, this decoupling of contact center and voice service should allow companies to select contact center software providers based on alternative criteria, including multi-channel, AI and overall ease-of-use.

Unified Communications Software and Voice Deployment Models

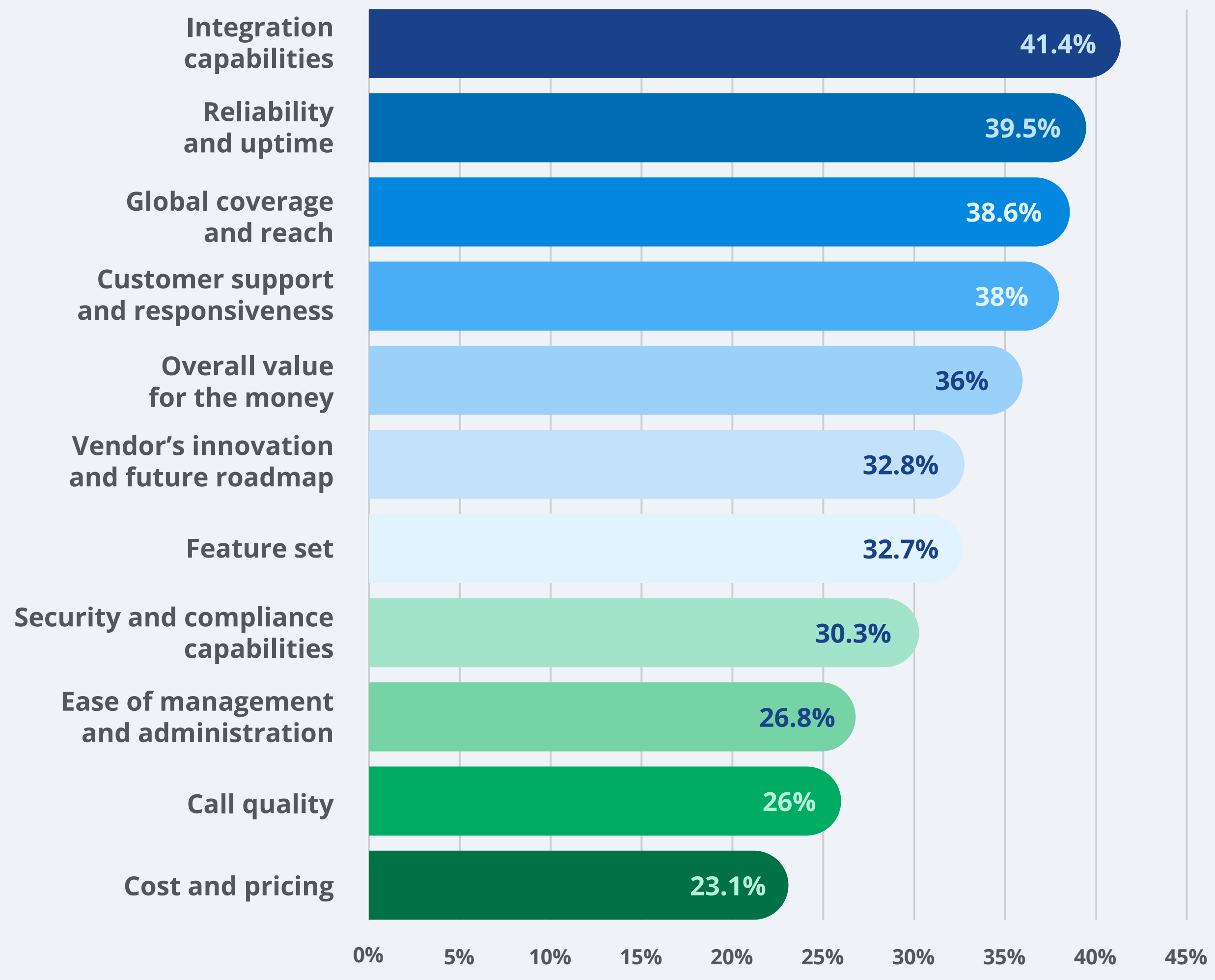
Unified Communications (UC) solutions mirror contact center technology trends. In terms of cloud versus on-prem solutions, hybrid leads the way.

Nearly half of respondents use a hybrid UC model, while two-thirds (66%) maintain some level of on-premises infrastructure and 81% incorporate UCaaS in their environment. This reflects a continued shift toward cloud capabilities, even as many organizations retain on-prem systems for specific needs or legacy compatibility.

Which best describes the primary deployment model for your company's unified communications (UC) solution?



Top Satisfaction Factors for Primary UC Solution Provider



Integration capabilities (41%), reliability / uptime (40%), and global reach (39%) are the most influential factors in UCaaS provider selection—nearly identical to the priorities seen in CCaaS evaluations. One notable difference in UCaaS vendor selection is that call quality, although still an important criteria, ranks as a relatively lower priority compared to CCaaS.

This reflects the different stakes between environments: in the contact center, call quality directly impacts customer experience and sales, making each call critical. In UCaaS, by contrast, most interactions are internal employee calls, where minor quality issues may be viewed as less consequential than in customer-facing conversations.

Voice Partner Purchasing Outlook

Voice services within UC are sourced from multiple provider types. **More than half (52%) obtain them from their UCaaS provider, while nearly as many (50%) turn to global or local telecom carriers, and 40% leverage a specialty global voice provider.**

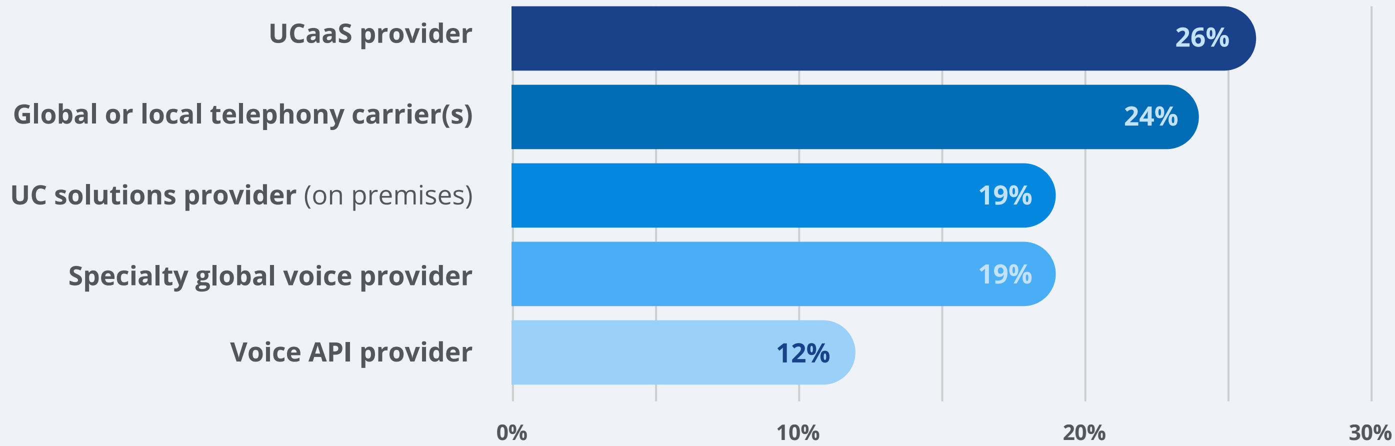
52% of companies surveyed **get voice services from their UCaaS provider**

50% of companies use **global or local telecom carriers**

40% of companies use a **specialty global voice provider**

Current primary voice service providers are closely split: UCaaS (26%) and telecom providers (24%) lead, followed by on-prem UC providers (19%) and specialty global voice providers (19%).

Which is the primary provider type your company uses to support existing voice calling with your UC solution?



Looking ahead, needs are expected to change for 79% of organizations within the next one to two years—driven by requirements such as new number types or expanded coverage. This suggests that as companies fully deploy and experience their UCaaS solutions, they recognize a gap in global calling functionality.

For 40% of respondents, these needs will result in a shift to a new preferred provider. **One-third (34%) expect to select a specialty global voice provider**, seeking greater control (60%) and the ability to better leverage AI (55%) in their communications strategies.

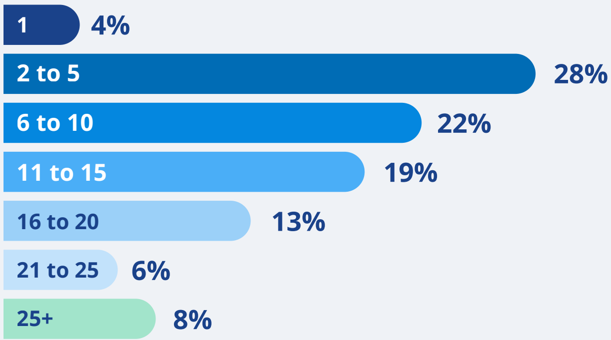
Mimicking the preferences for CCaaS, more respondents selected specialty voice providers than any of the other options: UCaaS provider (26%), global/local telephony carrier (22%), voice API provider (6%).

Vendor Consolidation Trends

Voice vendor consolidation remains a clear priority for contact center leaders and is increasingly common across the UC and CCaaS landscape.

Nearly all respondents (96%) continue to use more than one voice provider, and **68% work with six or more providers**. The vast majority of these organizations (97%) are actively consolidating vendors or considering doing so. The push toward fewer providers is driven primarily by the need to improve call quality and secure better, more responsive support.

Total Providers Used to Support Global Voice Calling for the Contact Center



97% of companies surveyed **are actively consolidating vendors, or considering**

58% are actively consolidating

35% are evaluating their options

4% will consolidate, but have no plans

For many, managing multiple providers creates operational complexity, introduces variability in performance, and makes it harder to maintain consistent customer experiences across geographies.

Consolidating with a smaller set of trusted partners—or a single global provider—offers the potential for streamlined management, stronger accountability, and improved service consistency.

As organizations expand AI adoption and shift more services to the cloud, this focus on consolidation is likely to accelerate, with enterprises seeking providers that can deliver both technical excellence and specialized support at scale.

Regulatory and Compliance

Managing regulatory compliance for international voice services remains a complex and resource-intensive task for most organizations. Enterprises experienced sporadic compliance-related challenges in certain regions throughout the world, such as Asia and the Middle East.

The majority take a blended approach monitoring and addressing telecom compliance, combining internal oversight with external expertise.

Over half of respondents engage legal firms specializing in international telecom law (55%) or manage compliance internally (51%), while significant numbers also outsource to third-party experts (43%) or rely on their voice service providers for guidance (42%).

Despite these efforts, regulatory challenges persist. **Nearly six in ten organizations (59%) report difficulty keeping up with frequent and often fragmented changes to telecom rules.**

More than half (53%) struggle to determine which regulations apply to their specific operations across multiple markets, and nearly as many (49%) find it difficult to adhere to varying requirements once identified.

These challenges underscore the ongoing need for providers that can offer broad geographic coverage, can present multiple number options per country, have direct relationships with in-country providers and have deep, localized regulatory expertise—helping enterprises navigate compliance efficiently while minimizing operational risk.

AI Readiness and Outcomes in Voice Systems

Artificial intelligence has firmly established itself as a core capability in modern voice systems, particularly across the contact center. And as AI reduces the cost of each call, companies are increasing access to this preferred communications channel.

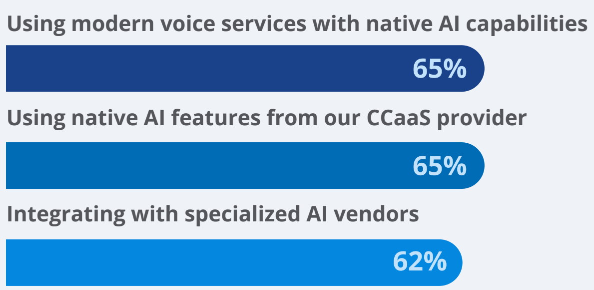
A full **81% of organizations have already AI-enabled their voice environments**, reflecting the technology's growing role in driving operational efficiency and improving customer experiences.

82% of organizations are **see or expect to see AI drive more voice traffic**

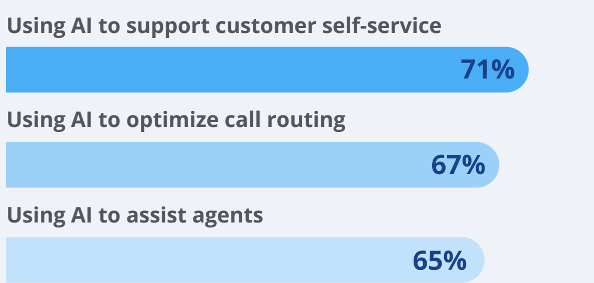
Source: Metrigy Customer Experience Optimization 2024-25

81% of organizations have already **AI-enabled their voice environments**

Methods Used to Implement AI



How AI is Being Used for Voice



Companies are taking varied approaches to implementation—most commonly by using modern voice services with native AI capabilities (65%), leveraging AI features built into their CCaaS platforms (65%), or integrating with specialized AI vendors (62%).

AI is delivering value across multiple use cases. **The most widely adopted applications include supporting customer self-service (71%), optimizing call routing to improve efficiency (67%), and providing real-time agent assistance (65%).**

These capabilities enable faster resolution times, reduce operational costs, and enhance the customer experience by ensuring that callers are connected with the right resources more quickly.

Despite widespread adoption, challenges remain. **The most frequently cited concerns are the quality of AI output (45%) and the security and privacy of voice data (43%).**

Challenges Encountered in AI

45% of organizations cited the **quality of AI output**

43% of organizations cited **security & privacy of voice data**

ADDITIONAL CHALLENGES CITED

- Scalability of handling peak call volumes
- Difficulty integrating AI with voice infrastructure
- Latency too high for real-time voice requirements
- Poor quality of voice data available to AI
- Insufficient amount of voice data for AI

Encouragingly, most organizations are taking a data-driven approach to improvement—92% are actively measuring the outcomes of their AI-enabled voice systems.

This emphasis on measurement suggests that AI in voice is shifting from experimentation to a results-oriented phase, where ongoing optimization will be key to sustaining competitive advantage.

92% of companies **are measuring the success of AI-enabled voice systems**

Conclusion

The second annual State of International Voice for the Contact Center reveals a market in active transition—where hybrid deployment models remain common, but momentum toward cloud-based solutions and specialized providers is accelerating. The findings underscore that decisions around vendor selection, platform strategy, AI adoption, and compliance must be made with a clear view of both current needs and future scalability.

Strategic Implications & Recommendations

Vendor Model Selection

As most organizations still work with multiple providers, consolidation presents a clear path to improving service quality, support responsiveness, and operational efficiency with the right partner. Leaders should evaluate not only coverage and pricing, but also each provider's software management capabilities, depth of expertise in global voice infrastructure, regulatory compliance, and advanced troubleshooting.

Bundling versus Unbundled Purchasing

Many companies have purchased voice / calling plans from their CCaaS or UCaaS provider when it is offered. However, many enterprises will achieve optimal results by pairing by their contact center agent or employee communications platform with a specialty global voice provider—gaining superior coverage, more number types, and deep expertise in voice infrastructure, compliance, and mission-critical support.

This best-of-breed approach preserves platform efficiency while allowing for future flexibility if contact center or unified communications software needs change and new providers are brought into the mix.

AI Readiness Planning

With 81% already AI-enabled and 92% measuring results, AI in voice has shifted from early adoption to measurable impact. Organizations should choose vendors that deliver high call quality for human-like conversations (low latency, high clarity), global coverage, easy-to-implement AI integrations, and flexible routing.

Enterprise-grade reliability—with built-in testing, continuous monitoring, and expert support—will be essential to keep the voice channel clear, stable, and optimized as AI capabilities evolve.

Compliance and Risk Management

Global voice compliance remains a top operational challenge, requiring both centralized oversight and localized expertise. Enterprises should adopt a layered compliance strategy that combines in-house capabilities with trusted legal, technical, and provider partnerships.

Providers with in-depth voice expertise that offer proactive regulatory updates and guidance, multiple service paths to establish an in-presence, and built-in compliance features will reduce both risk and operational burden.

In an increasingly global, AI-driven, and regulated environment, the organizations best positioned for success will be those that align their technology choices with long-term business goals—balancing integration and performance with flexibility and control.

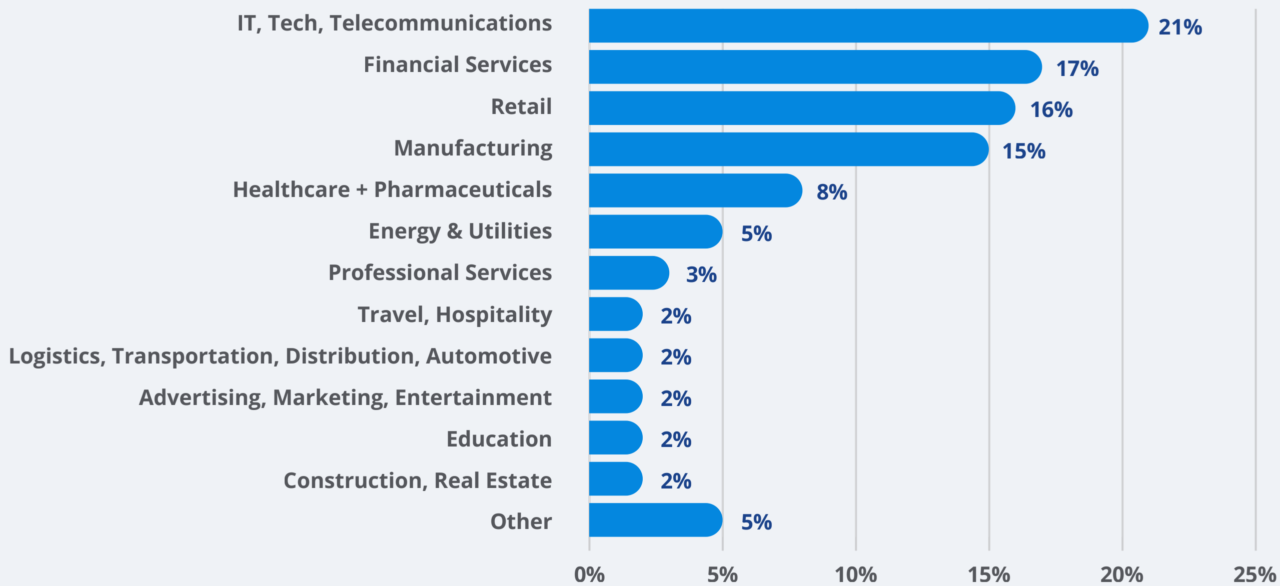
About the Respondents

This survey was conducted among IT and voice decision makers at the manager, director, VP and executive level, across 10 countries and 16 industries.

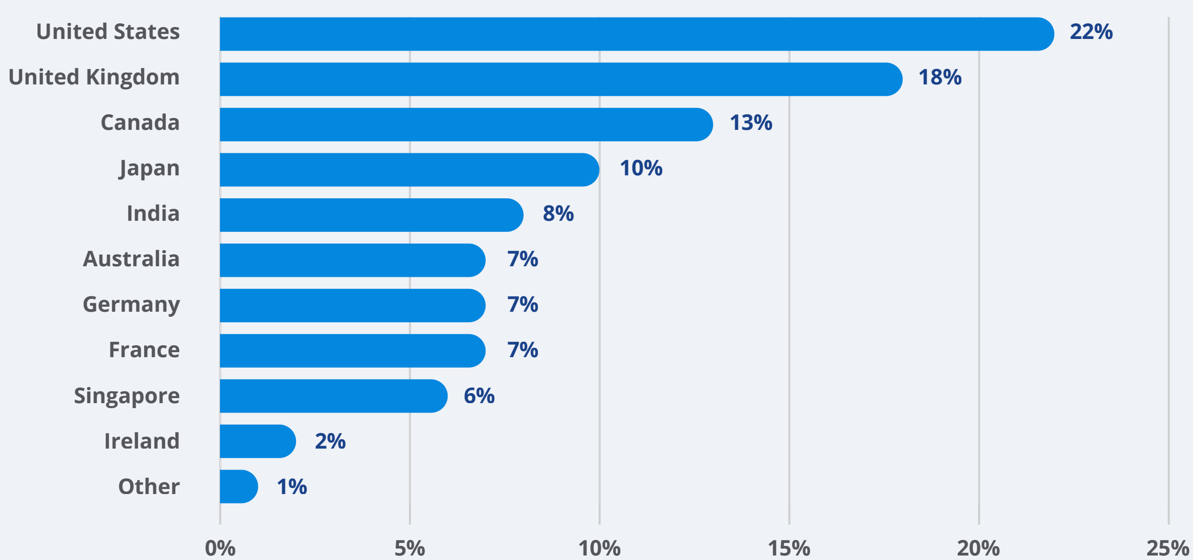
365 Total Participants

Mean Employee Count: **6,738**

Participants by Industry



Participants by Company Headquarters



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.

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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.

metrigy.com

Appendix

DEFINITIONS OF VOICE SERVICE PROVIDER TYPES	EXAMPLES
Contact center-as-a-service (CCaaS) providers Enable support for and management of voice plus other customer-facing communications channels (email, messaging, etc.) via a cloud-based communications platform	Amazon Web Services, Genesys, NICE
Global or local telephony carriers Support voice calling over landline and/or cellular networks	AT&T, BT
Specialty global voice providers Deliver international voice service or virtual numbers via a cloud-based communications platform	AVOXI
Unified communications-as-a-service (UCaaS) providers Enable support for and management of messaging, voice, and video services, often for internal/employee and some types of external communications	Microsoft, Webex by Cisco, Zoom
UC system providers (on-premises) Some offer their own voice services or have partnerships with preferred voice services providers	
Voice API providers Offer the ability to add communications services (messaging, voice, video, etc.) via the use of application programming interfaces and cloud infrastructure	Twilio, Bandwidth

Track the Shift in Voice Strategy

2024 showed where enterprises were headed.
Read last year's edition to see how priorities have evolved.

Download the 2024 Report