

Building a Smarter Global Customer Experience Strategy

How to Build the Right Geographic Strategy for Cost,
Customer Experience, AI, and Business Outcomes



In today's competitive business landscape, delivering exceptional customer service is more important than ever. One of the critical decisions that companies face is choosing the right contact center geography to support their unique needs.

Organizations must balance cost, customer experience, talent, scalability, compliance, and operational resilience to build the right global delivery strategy.

Rather than choosing between onshore, nearshore, or offshore, today's CX leaders are building blended or hybrid global customer experience strategies that align with their business priorities—combining the strengths of multiple delivery locations to optimize cost, customer experience, talent, scalability, and resilience.

This whitepaper is designed to guide organizations through these choices, providing a comprehensive look at the strategic benefits of each model and offering insights to help identify the best fit for your customer service strategy.

→ Explore the Liveops Geo Planner



Understanding Onshore, Nearshore, and Offshore Models

Onshore Contact Centers

Onshore contact centers offer the advantage of complete cultural and linguistic alignment and are often preferred for industries requiring stringent compliance, highly empathetic service, and brand affinity.

According to the U.S. Bureau of Labor Statistics, approximately 2.8 million customer service representatives were employed across U.S. industries in 2024, underscoring the scale of the domestic workforce supporting customer interactions.

Onshore contact centers are often utilized by industries with sensitive data, such as [healthcare](#) and [finance](#), due to strict data privacy and labor laws.



Nearshore Contact Centers

Nearshore contact centers are located in neighboring or nearby countries, typically within 1–3 time zones of the business's operations. This model offers cost savings and bilingual talent, particularly in regions like Latin America for North American businesses.



30% to
50%

cost savings compared to onshore alternatives

Across Latin America and the Caribbean, countries including **Mexico, Colombia, Belize, and Dominica** continue to attract organizations looking to balance customer experience with operational efficiency. These markets offer a combination of English- and Spanish-speaking talent, geographic proximity, and the ability to collaborate in real time with U.S.-based teams. Depending on the delivery location and service complexity, organizations can often achieve **30–50% cost savings** compared to fully onshore operations while maintaining high-quality customer experiences.

8.5%

annual growth rate in the Latin American
contact center market

These cost efficiencies align with the region's overall growth, as highlighted by Frost & Sullivan, which reports an **8.5% annual growth rate in the Latin American contact center market**, largely driven by U.S. demand for Spanish-English bilingual agents. With its close proximity, skilled workforce, and economic advantages, Latin America offers a compelling option for companies seeking a balance between quality customer service and reduced costs.

Offshore Contact Centers

Offshore contact centers, located in countries far from a company's headquarters, such as the Philippines, India, South Africa, and the United Kingdom are chosen for their cost-effectiveness, scalability, specialized talent, and ability to manage high call volumes. Each region offers distinct advantages depending on business priorities, customer demographics, language requirements, and service complexity.



The offshore market continues to grow as organizations expand their global customer operations. [Grand View Research](#) valued the global offshore call and contact center outsourcing segment at approximately \$41 billion in 2024 and expects it to reach nearly \$71 billion by 2030, representing a compound annual growth rate of 10.3%.

Offshore contact centers across the Philippines, India, South Africa, the United Kingdom, and other global delivery hubs continue to play a critical role in industries like IT and e-commerce, where scalability and cost-efficiency are essential.

By integrating offshore centers for high-volume,

transactional tasks with onshore or nearshore teams for more complex and personalized interactions, businesses can achieve an optimal balance of operational savings and customer satisfaction. This hybrid delivery strategy ensures that companies meet diverse customer needs while leveraging the strengths of each model to deliver exceptional service.

Explore Liveops Global Solutions

Blended or Hybrid Delivery Locations

While onshore, nearshore, and offshore delivery locations each offer unique strengths, many organizations are no longer relying on a single geography. Instead, they are designing hybrid delivery strategies that intentionally combine two or more locations to align talent, cost, customer expectations, and operational goals.

For example, a company may use U.S.-based agents for highly regulated or emotionally complex interactions while leveraging the Philippines for scalable customer support and Mexico for bilingual service and time zone alignment. A more complex global strategy may also include India for technical support and back-office processing, South Africa for premium English-language voice support, and the United Kingdom for localized customer experiences across UK and European markets.

Rather than asking which location is best, organizations are increasingly asking which combination delivers the best customer experience and improved business outcomes. Hybrid delivery models improve operational flexibility by distributing work based on business needs rather than geography alone. They also strengthen business continuity, expand access to talent, provide around-the-clock coverage, and reduce the risk associated with relying on a single location.

According to the [2026 State of the Shared Services & Outsourcing Industry Global Market Report from Shared Services & Outsourcing Network \(SSON\)](#), 75% of organizations now operate multifunctional, multi-country shared services models, up from 69% the previous year.

In addition, 86% plan to expand their scope by adding services, extending their geographic reach, or both. These findings demonstrate how hybrid, multi-location operating models are becoming central to improving resilience, accessing specialized talent, and delivering greater business value.





The Philippines: A Leader in the Global BPO Industry

The Philippines remains one of the world's leading IT-BPM delivery destinations, supported by deep customer experience expertise, a large English-speaking talent pool, and an expanding portfolio of higher-value services.

The Philippine IT-BPM sector generated \$40.3 billion in revenue and supported approximately 1.9 million professionals in 2025. In 2026, the sector is expected to generate \$42.3 billion in revenue and support approximately 1.96 million professionals, according to the [Information Technology and Business Process Association of the Philippines \(IBPAP\)](#).

Looking ahead, [IBPAP's revised 2028 outlook](#) projects industry revenue between \$43.3 billion and \$50.5 billion and employment between 1.85 million and 2.14 million. The association also aims to develop approximately two million AI-enabled digital Filipino professionals by 2028, reflecting a broader shift from capacity-based growth toward higher-value capabilities.

This evolution is expanding the Philippines' role beyond traditional voice support. Growth opportunities increasingly include analytics, engineering, finance, healthcare information management, digital services, and other knowledge-intensive work. By combining AI fluency with human capabilities such as empathy, judgment, critical thinking, and industry expertise, the Philippines is strengthening its position as a destination for complex, technology-enabled customer operations.

1.96 million

professionals expected to be employed in 2026

\$43.3 - \$50.5 billion
projected in
revenue for 2028

\$40.3 billion
in revenue

2025

2028 revised outlook

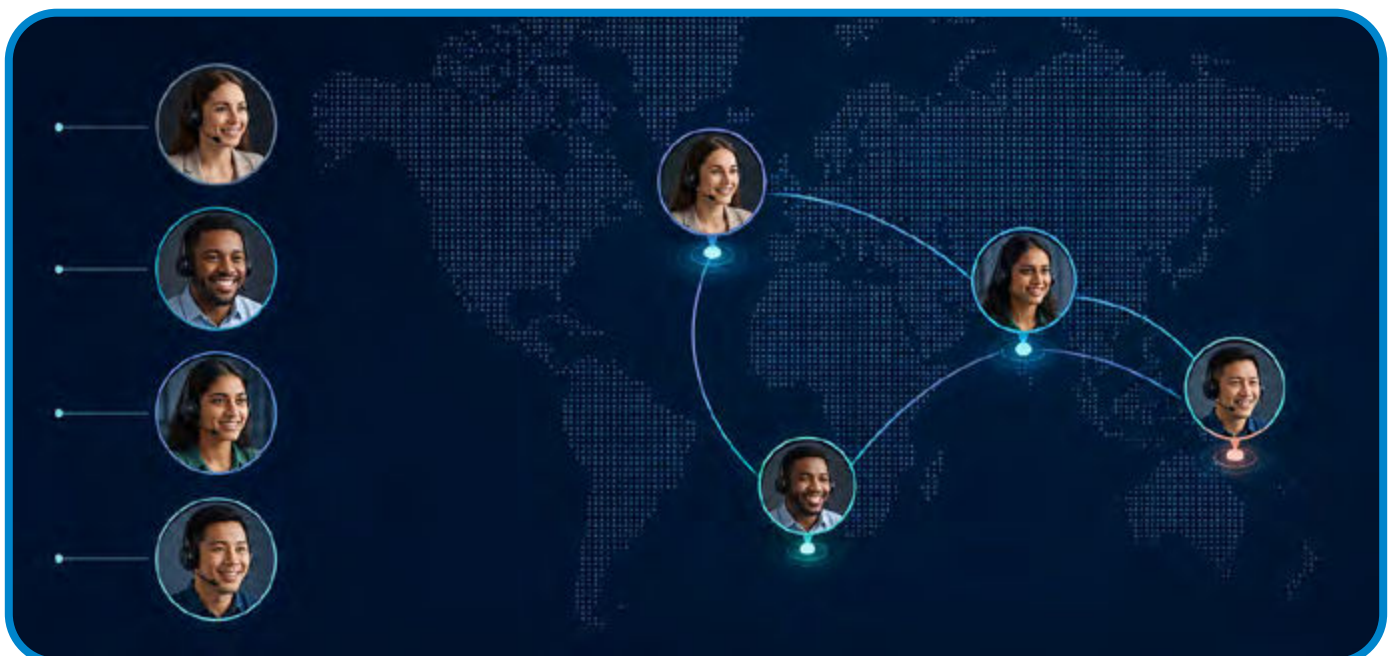
Other Global Offshore Delivery Hubs

While the Philippines remains one of the world's leading customer experience destinations, many enterprises also leverage other global delivery markets based on their operational priorities.

India has long been recognized for its deep technical expertise, large English-speaking talent pool, and strength in IT services, technical support, and back-office operations. It remains one of the world's largest outsourcing destinations for complex business processes and technology services.

South Africa has emerged as a preferred destination for customer experience outsourcing because of its English-language capabilities, cultural affinity with Western markets, and high-quality customer service capabilities. [BPESA](#) has described [South Africa's BPO sector as one of the country's fastest-growing exports](#) and notes that the country continues to rank among the top global offshore CX delivery locations.

The United Kingdom is often utilized for organizations serving UK and European customers that require native language support, regulatory familiarity, or premium customer experiences. While costs are generally higher than traditional offshore destinations, UK-based delivery can be valuable for specialized industries, regulated interactions, and high-touch customer support.



Mexico: A Strategic Nearshore Option

Mexico has become a significant player in the Business Process Outsourcing (BPO) industry, offering nearshore contact center solutions with distinct advantages. The country's proximity to the U.S., cultural alignment, and a bilingual workforce makes it an attractive destination for businesses seeking cost-effective, high-quality customer service. **Mexico's BPO market is expected to surpass \$5.55 billion**, with a steady annual growth rate (CAGR) of 4.28% anticipated through 2029, highlighting the sector's continued expansion and resilience.

Mexico's BPO market expected to surpass \$5.5 Billion

4.28%

anticipated growth through 2029



Employing a large pool of highly educated and motivated personnel, Mexico's BPO industry ensures seamless customer interactions thanks to strong English proficiency and familiarity with U.S. culture. The country produces a significant number of STEM graduates annually, supporting its growing tech sector. Service offerings extend beyond customer support to include manufacturing, back-office functions like data entry and human resources, and IT services, catering to diverse business needs.

Mexico's substantial investments in IT infrastructure and business parks have transformed it into a digital hub in Latin America.

Its geographic location enables real-time collaboration with minimal time zone differences, facilitating faster response times and efficient communication. These factors, combined with cost savings and a highly skilled labor force, position Mexico as a strategic nearshore option for businesses aiming to enhance customer satisfaction and operational efficiency while maintaining high service quality.



The Future of Global Customer Operations: Buyer Expectations Are Evolving

Insights from CMP Research on the Future of Customer Contact

Customer service leaders are rethinking how they build global operations. Drawing on recent findings from [CMP Research](#), it's clear the conversation has shifted beyond choosing between onshore, nearshore, or offshore delivery. Instead, organizations are asking a more strategic question:

What geographic strategy will best support our customer experience, business goals, AI initiatives, and long-term growth?

As customer expectations evolve and AI transforms customer service, organizations are diversifying their delivery strategies to improve resilience, expand access to talent, strengthen multilingual support, and optimize customer outcomes.

The following insights and data, provided in collaboration with [CMP Research](#), highlight how buyer expectations are changing and where organizations expect to expand their customer operations over the next several years.

This shift reflects a broader change across the customer experience industry. Rather than concentrating operations in a single geography, businesses are increasingly building blended global customer operations strategies that combine multiple delivery locations based on business priorities.

Today's Outsourcing Landscape

Although organizations are expanding globally, North America continues to serve as the foundation for many customer operations strategies.

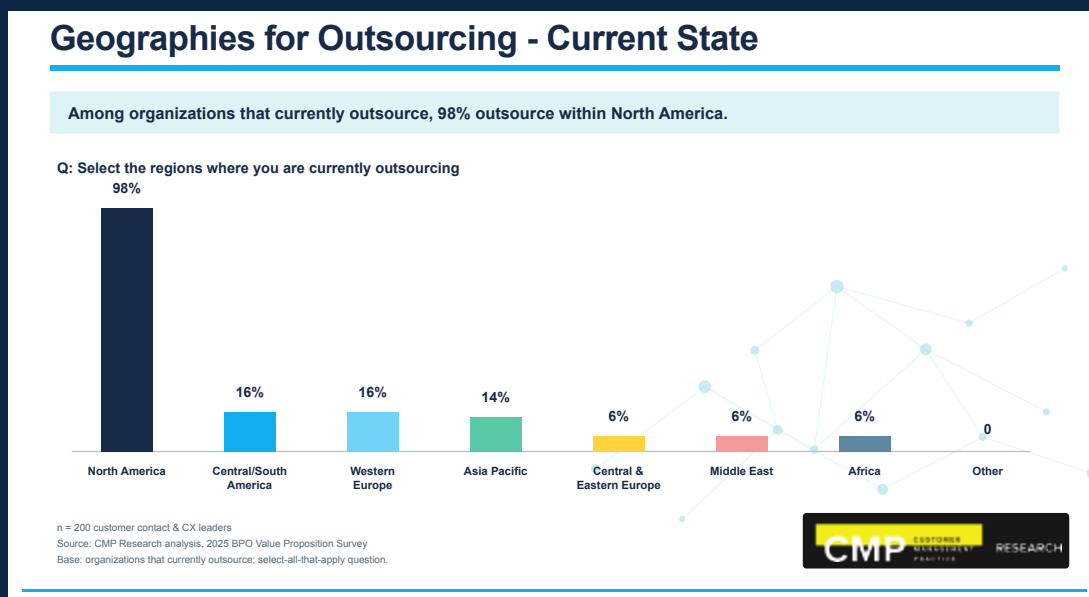


Figure 1. According to CMP Research, 98% of organizations that currently outsource do so within North America, making it the most widely utilized delivery region today. Additional regions—including Western Europe, Asia Pacific, Central & Eastern Europe, the Middle East, Africa, and Central & South America—are already part of many organizations' global delivery footprints.

Following North America, organizations also leverage Western Europe, Asia Pacific, and Central & South America to support multilingual customer service, regional expertise, and operational flexibility.

While North America remains the dominant delivery location today, the research shows that customer service leaders are actively evaluating broader geographic strategies as business needs to evolve.

Global Expansion Is Accelerating

The next phase of customer operations will be defined by greater geographic diversification, not greater concentration.

CMP Research found that organizations expect outsourcing activity to increase across nearly every major global region over the next four years.

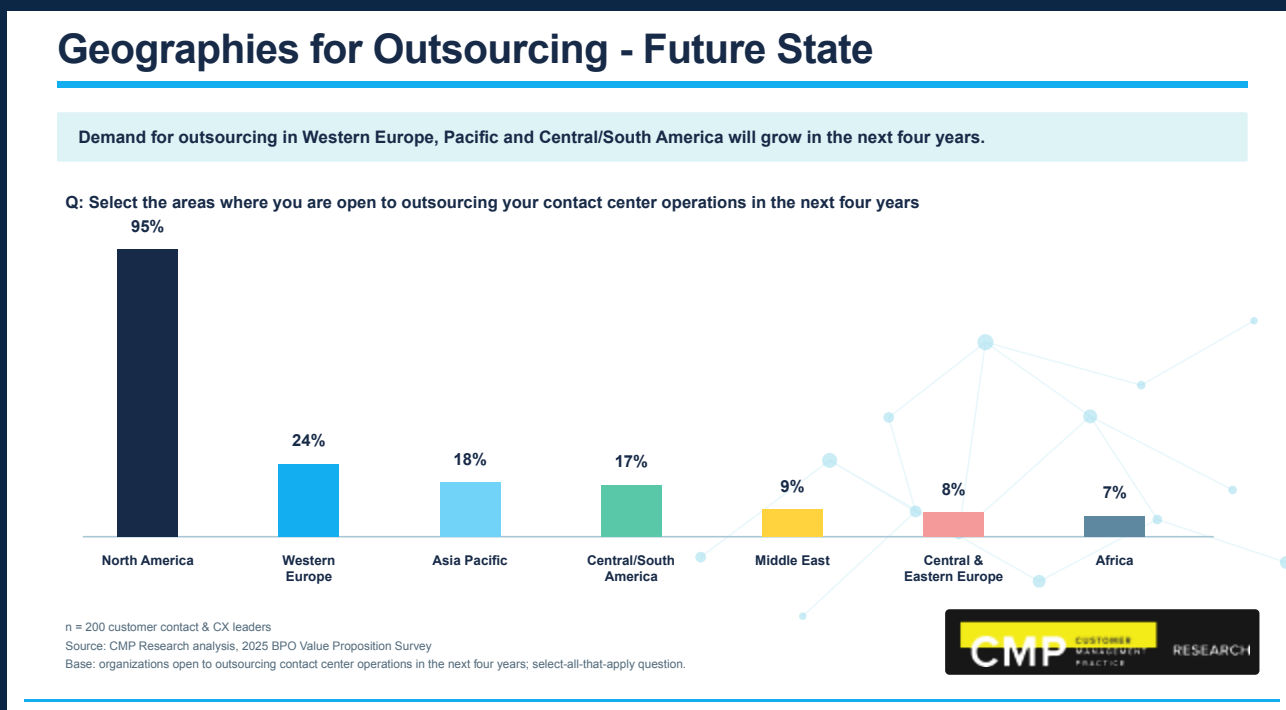


Figure 2. Organizations expect outsourcing demand to grow across multiple global regions, including Western Europe (+8 percentage points), Asia Pacific (+4), Middle East (+3), Central & Eastern Europe (+2), Central & South America (+1), and Africa (+1). At the same time, reliance on North America alone is projected to decrease by approximately three percentage points as organizations diversify their delivery strategies.

Rather than moving work from one location to another, organizations are building **multi-region customer operations strategies** that leverage the unique strengths of different geographies.

For example:

- North America for complex, regulated, or high-empathy interactions
- Mexico and other nearshore markets for bilingual customer support and time zone alignment
- The Philippines for scalable customer service
- India for technical support and back-office operations
- South Africa for premium English-language voice support
- Western Europe and the United Kingdom for localized customer experiences

This evolution allows organizations to improve customer experience while strengthening resilience, expanding talent access, and creating greater operational flexibility.

The Shift Is About More Than Cost

Historically, outsourcing decisions focused primarily on labor arbitrage. Today, that approach is changing.

Customer experience leaders are evaluating geographic strategies across a much broader set of business priorities, recognizing that no single location can optimize every aspect of customer operations.

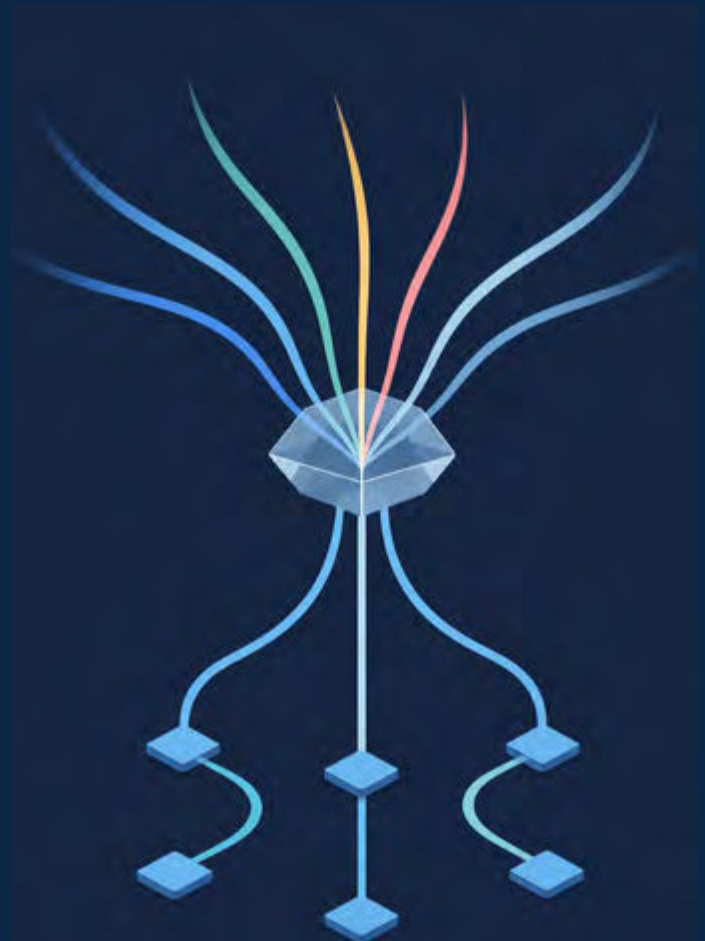
Today's global customer operations strategies are designed to balance:

- **Cost** – Optimizing total operating costs while maintaining service quality and business outcomes.
- **Languages** – Expanding multilingual support and aligning language capabilities with customer expectations.
- **Customer Interaction Complexity** – Matching the right types of customer interactions to the delivery locations best equipped to handle them.
- **Talent** – Accessing specialized expertise, industry knowledge, cultural alignment, and customer service capabilities across global markets.
- **Compliance & Risk** – Strengthening data security, regulatory compliance, business continuity, and operational resilience.
- **Scalability** – Building the flexibility to rapidly expand, contract, or shift capacity as business needs to evolve.
- **Travel Access** – Considering geographic proximity, executive collaboration, and ease of onsite governance when selecting delivery locations.

The result is a more sophisticated approach to global customer operations—one that aligns different types of customer interactions with the delivery locations best equipped to support them.

There is no longer a single “best” geography. Instead, organizations are asking **which combination of locations will deliver the strongest business outcomes.**

This is where strategic planning becomes essential.



Building Your Global Customer Operations Strategy

The seven factors that should drive every global operations decision

The following factors form the foundation of a successful global customer operations strategy and are the same considerations evaluated within the [Liveops Customer Experience Geo Planner](#).

Cost

Cost remains one of the primary drivers behind global customer operations decisions, but today's leaders look beyond hourly labor rates. They evaluate the total cost of service delivery, including recruiting, onboarding, technology, infrastructure, management, and the long-term value each location provides.

Rather than pursuing the lowest-cost option, leading organizations focus on maximizing business value and customer outcomes.

Typical considerations include:

Onshore

Higher operating costs, ideal for premium customer experiences and highly regulated industries.

Nearshore

Moderate costs that balance affordability with proximity, bilingual capabilities, and real-time collaboration.

Offshore

Lower operating costs with access to large, scalable talent markets that support high-volume customer interactions.

Hybrid

Combines multiple locations to optimize cost while maintaining customer experience and operational performance.



Languages

Language capabilities influence customer satisfaction, trust, and first-contact resolution. As organizations serve increasingly diverse customer bases, multilingual support has become a competitive advantage.

When evaluating delivery locations, consider:

- Native-language support for localized customer experiences.
- English and Spanish bilingual capabilities available across many nearshore markets.
- Large multilingual talent pools that support global customer engagement.
- The ability to route interactions based on customer language preferences and regional expectations.

The right language strategy improves communication while creating a more personalized customer experience.

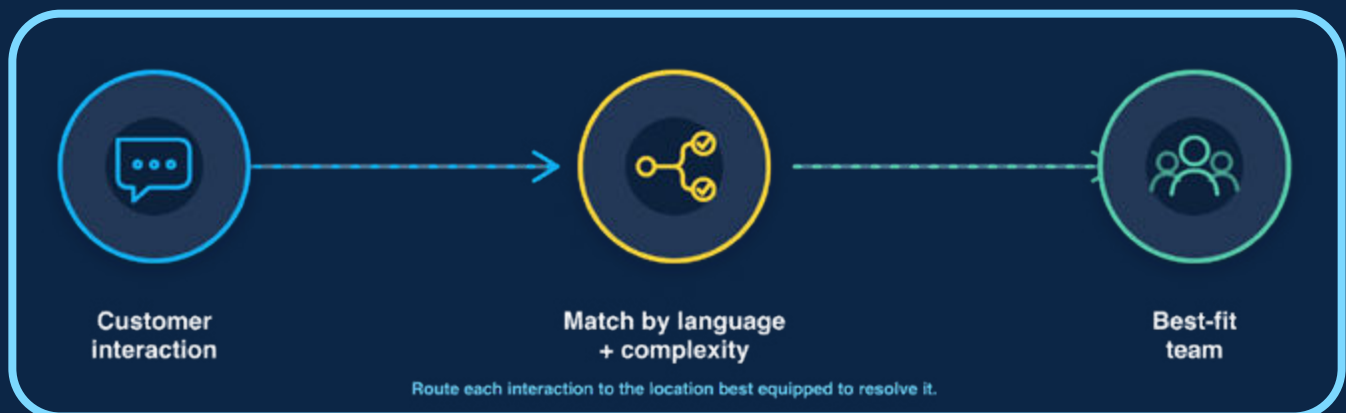
Customer Interaction Complexity

Not every customer interaction requires the same level of expertise, empathy, or regulatory oversight. Matching interaction types to the appropriate delivery location can improve both efficiency and customer satisfaction.

Examples include:

- **Onshore:** Complex, high-empathy interactions, regulated industries, escalations, and sensitive customer conversations.
- **Nearshore:** Bilingual support, moderate-complexity interactions, customer retention, and account support.
- **Offshore:** High-volume customer service, technical support, order processing, FAQs and back-office operations.
- **Hybrid:** Routes each interaction, call type, or line of business to the geography best equipped to resolve it based on complexity, language, and business requirements.

Aligning work with the right location allows organizations to deliver better customer experiences while optimizing resources.



Talent

The strength of a global customer operations strategy depends on more than labor availability. Organizations should evaluate each geography based on industry expertise, technical capabilities, customer service skills, cultural alignment, and workforce depth.

Different regions have developed specialized strengths, including:

- North America for regulated industries, premium customer experiences, and complex customer care.
- Mexico and other nearshore markets for bilingual customer engagement and cultural alignment.
- The Philippines for customer service excellence, relationship-oriented communication, and large-scale voice support, making it a strong fit for customer care, retention, hospitality, healthcare member services, and other service-focused interactions.
- India for technical support, IT services, and business process expertise.
- South Africa for premium English-language customer support, strong communication skills, and customer service capabilities across voice and digital channels.
- The United Kingdom for localized support across UK and European markets.

Selecting the right talent for each type of customer interaction often delivers stronger business outcomes than selecting a geography based on cost alone.

Compliance & Risk

Security, regulatory compliance, and operational resilience have become essential components of global customer operations.

Organizations should evaluate each delivery location based on:

- Data privacy and security requirements.
- Industry-specific regulations.
- Business continuity and disaster recovery capabilities.
- Political and economic stability.
- Geographic risk and resilience.
- Security certifications and governance standards.

Many organizations reduce operational risk by distributing customer interactions across multiple delivery locations rather than relying on a single geography.



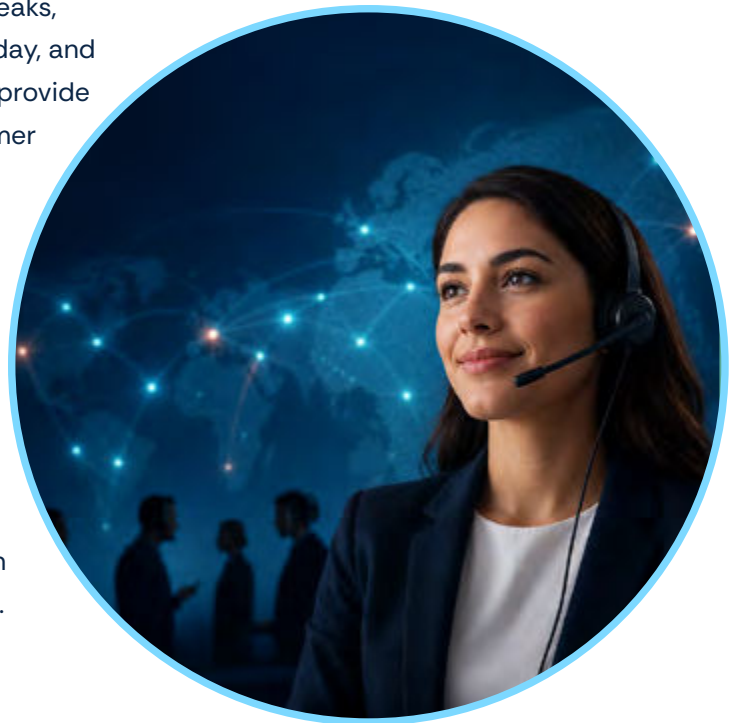
Scalability

Customer demand can change quickly due to seasonal peaks, product launches, busy days of the week or hours of the day, and unexpected events. The right geographic strategy should provide the flexibility to scale without sacrificing quality or customer experience.

Key considerations include:

- Access to qualified talent.
- Speed to ramp new programs.
- Flexibility to increase or decrease capacity.
- Support for 24/7 and multilingual operations.
- Long-term growth potential across multiple regions.

Organizations with diversified delivery strategies are often better positioned to respond to changing business needs.



Travel Access

Although customer operations have become increasingly remote, geographic accessibility remains important for executive collaboration, operational governance, client engagement, and business continuity.

When evaluating delivery locations, consider:

- Ease of travel and flight availability.
- Time zone alignment for leadership collaboration.
- Accessibility for onsite visits and operational oversight.
- Regional infrastructure and business connectivity.
- Proximity to key customer markets.

Travel accessibility can strengthen partnerships, accelerate decision-making, and simplify ongoing operational management.

The Strongest Customer Operations Strategies Combine Multiple Geographies

No single location delivers every advantage. Organizations seeking long-term success increasingly combine onshore, nearshore, and offshore delivery locations to align customer interactions with the talent, language capabilities, compliance requirements, scalability, and customer experiences each geography supports best.

The **Liveops Customer Experience Geo Planner** helps organizations evaluate these decision factors and identify the geographic strategy that best aligns with their business objectives, customer expectations, and long-term growth plans.

[Explore the Liveops Customer Experience Geo Planner →](#)

Customer Operations Geo Planner | [liveops.com/customer-operations-geo-planner/](#)

FILTERS

Choose what matters
Set your priorities below.

Operating overlap

North America | Europe-UK | APAC | Flexible

Cultural affinity

High | Medium | Low

Travel access importance

High | Medium | Low

Delivery model

Independent contractor | Remote-WFH

Brick & Mortar | Flexible

Interaction Complexity & Value

Balanced value

HOW IT WORKS

Turn priorities into a smarter geography mix

Choose what matters for your program. The planner then compares locations against those priorities.

- 1 Set your priorities**
Define the factors that matter most.
- 2 Compare geographies**
Review how locations match your needs.
- 3 Build the delivery mix**
Combine coverage around your strategy.

Personalized results appear after your selections.

Why a Blended Global Strategy Delivers Better Business Outcomes

A hybrid delivery strategy combines the strengths of multiple delivery locations rather than relying on a single geography. This approach enables organizations to optimize customer experience while improving operational flexibility.

Optimize Every Interaction

Different customer interactions require different skills and geographic strengths. Organizations may combine U.S. teams for regulated interactions, Mexico for bilingual service, the Philippines for scalable customer support, India for technical expertise, South Africa for premium English-language voice support, and the United Kingdom for localized European customer experiences.

Scale Faster

Organizations gain access to larger talent pools across multiple countries, making it easier to flex capacity during seasonal peaks, rapid business growth, product launches, or market expansion.

Expand Coverage Hours

Multiple locations make it easier to support customers across time zones while reducing staffing strain and improving responsiveness. This can be especially valuable for businesses serving national or global customer bases.

Improve Business Continuity

Distributing operations across multiple regions reduces geographic risk and strengthens resilience during severe weather, political events, labor shortages, technology disruptions, or unexpected demand spikes. If one region experiences disruption, another location can help maintain service continuity.

Balance Cost and Experience

High-value customer interactions can remain onshore while high-volume support is delivered offshore and bilingual services nearshore, optimizing both customer satisfaction and operating costs. This gives businesses more control over where to invest premium resources and where to capture efficiency.

Future-Proof Operations

Hybrid delivery creates greater flexibility to adapt as customer expectations, technologies, regulations, and business priorities evolve. As AI, automation, and customer preferences change, organizations can shift work across locations based on complexity, urgency, language, and value.

McKinsey has noted that global business services and sourcing strategies can help organizations improve service delivery at scale through faster, more accurate, and more consistent operations. McKinsey research has also found that more than 90% of global services hubs transitioned to remote delivery with virtually no loss of productivity, client service experience, or employee satisfaction, reinforcing the value of flexible, resilient service models.

By aligning geography to the type of interaction, compliance requirements, and operational goals, businesses can design a customer service strategy that is cost-efficient, resilient, and customer-focused. For many organizations, the strongest strategy is not one location, but the right combination of locations working together.

Optimize Your Global Customer Experience Operations with Liveops

Building a global customer operations strategy is about more than selecting the right geography. It's about finding the right partner to help you balance cost, customer experience, talent, compliance, scalability, and business outcomes.

Liveops helps organizations design and operate blended global customer experience strategies through a single, trusted partner. With flexible on-demand and dedicated delivery locations spanning onshore, nearshore, and offshore locations, you can align every customer interaction to the capabilities that best support your business objectives.

Why organizations choose a single global partner

- One strategic partner across onshore, nearshore, and offshore delivery
- Consistent customer experience and brand standards regardless of location
- Centralized reporting and performance visibility across all geographies
- Simplified vendor management with one contract, governance model, and executive team
- Greater operational agility to scale capacity or shift work between regions as business needs change
- Access to specialized and multilingual talent without managing multiple providers
- Consistent quality, security, and compliance standards across delivery models
- Integrated workforce strategy that combines AI, automation, and human expertise
- Improved business continuity and resilience through geographic diversification
- Faster expansion into new markets using an established global delivery network
- Lower operational complexity with standardized processes, technology, and reporting
- A future-ready customer operations strategy that evolves alongside your business

Whether your priority is reducing costs, improving customer experience, increasing resilience, or supporting global growth, Liveops helps you build a customer operations strategy that delivers measurable business outcomes, without the complexity of managing multiple outsourcing partners.

The **Liveops Customer Experience Geo Planner** is an interactive resource designed to help CX leaders compare global delivery options and identify the geographic strategy that best aligns with their business needs.

[Explore the Liveops Customer Experience Geo Planner →](#)



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Explore Liveops' Global Customer Service Solutions

[Learn More](#)

