ChuHai Global Outlook 2026

AI-Powered Operations and Localization for Chinese Brands Going Global

2025 Shanghai

Foreword

2026 marks an inflection point for China's globalizing enterprises. After years of rapid expansion, the ChuHai movement has matured into a new phase, one defined by sophistication, strategy, and sustainable global growth. Chinese companies are no longer just entering overseas markets; they are reshaping them by building the operational strength, trust, and local relevance required to thrive.

Yet with this global ambition come new complexities. The next stage of ChuHai will demand more than capital and innovation, it will require a deeper understanding of customers, cultures, and the operational and regulatory realities across borders. To succeed, Chinese brands must combine technological intelligence with human insight, building trust and delivering experiences that resonate in every market.

Over the past year, our conversations with Chinese executives have revealed a shared priority: the need to scale internationally while staying authentic to their brand origins. Many are asking the same questions; how to adapt CX models for local expectations, how to balance automation and empathy, and how to navigate a world of fast-changing digital and regulatory environments.

The ChuHai Global Outlook 2026 was created in response to that need. It distills global data, expert insight, and TP's frontline experience into a practical perspective on where the greatest opportunities, and risks, lie for Chinese brands going global.

At TP, our role is to support this journey as a trusted partner, helping Chinese enterprises expand faster, perform stronger, and grow smarter through trusted customer experience, digital innovation, and local market intelligence. But ultimately, this report is about you, the leaders shaping China's next wave of global success.

As we look ahead, one ambition unites us: accelerating China's growth on the global stage.

David Rizzo
President, TP APAC

Executive Summary

China remains one of the world's most significant sources of outbound investment, with global expansion continuing despite recent volatility. As capital flows diversify across regions, Chinese enterprises are reshaping globalization through more targeted, capability-led and partnership-driven strategies.

As China's next generation of global brands continues to expand, the challenge is evolving from market entry to market excellence. Growth abroad now depends not only on innovation and scale, but on localization, trust, and customer experience, the foundations of sustainable international success.

Based on research and insights compiled by **TP** and leading global sources, six forces are set to define the **ChuHai landscape in 2026:**

1 AI moves from experiment to enterprise core

According to Gartner, 85% of customer service leaders worldwide planned to explore or pilot customer-facing generative AI solutions in 2025, signaling rapid enterprise adoption of AI across global customer engagement and operational functions[1]. Among Chinese outbound firms, TP benchmarks show a 40% year-on-year increase in AI deployments across global operations.

2 CX becomes the new growth currency

McKinsey analysis shows that companies that are leaders in customer experience achieved more than double the revenue growth compared to less effective competitors[2]. For Chinese enterprises, customer-centric operational consistency and cultural relevance are now as critical as supply chain excellence.

3 Compliance is becoming a competitive advantage

According to PwC's 2025 *Global Compliance Survey* summary, cybersecurity, data-protection, and privacy compliance are ranked among the top risk priorities by executives across industries, indicating that regulatory readiness is a key consideration in strategic decisions such as market entry[3] .

4 Localization drives global traction

Brands that adapt their content, service and experience to local cultural expectations consistently achieve higher consumer trust, stronger brand acceptance and greater purchase intent than those relying on standardized global messaging.

5 Sector leadership is diversifying

Momentum is accelerating across multiple industries. The IEA's Global EV Outlook 2025 shows global electric car exports grew nearly 20% in 2024 to around 3.2 million units, with China contributing roughly 40% of that total[4].

In digital trade, China Briefing reports that China's cross-border e-commerce exports rose 19.6% in 2023 to RMB 1.83 trillion, reflecting the growing role of platform-driven outbound commerce[5]. Meanwhile, PwC's Global Entertainment & Media Outlook 2025–2029 projects global video game revenues to rise from US$224 billion in 2024 to around US$300 billion by 2029[6].

Together, these trends highlight the widening channels, manufacturing, e-commerce, and digital content, through which Chinese brands are scaling globally.

6 The next wave of ChuHai will be built on partnership

Collaboration with international ecosystems, service partners, and digital platforms is enabling Chinese companies to **scale faster, operate smarter, and engage more meaningfully** with global customers.

Together, these dynamics paint a picture of confident but complex growth. For Chinese brands, the path forward lies in combining intelligence with empathy, and innovation with trust, the very capabilities that will define sustainable success on the global stage.

For TP, this means supporting Chinese enterprises with insight, expertise, and global experience that help them expand faster, adapt more effectively, and build the foundations of long-term growth worldwide.

1

The Next Wave of ChuHai Growth

Chinese outbound investment enters an era of quality growth and strategic focus.

After two decades of rapid expansion, China's outbound investment is evolving from a scale game into a strategic pursuit of sustainable, capability-led growth. Official statistics indicate that China's total outward direct investment approached US$144 billion in the first ten months of 2025, with non-financial outward investment at about US$121.9 billion, roughly 5% higher year-on-year[7].

The IMF's World Economic Outlook projects moderate economic growth for China through 2026, with GDP expanding around 5% in 2025 and about 4.5% in 2026 as outbound investors balance global ambition with domestic optimization[8].

According to data summarized in the Global Trade and Investment Report 2025 (citing UNCTAD's World Investment Report 2025), China remains one of the world's largest sources of outward foreign direct investment, ranking alongside the United States and Japan in total FDI outflows[9].

The composition of this investment is changing fast: capital is shifting from manufacturing and infrastructure to technology, e-commerce, mobility, and digital services, sectors where customer experience (CX) is determining competitiveness.

In parallel, Chinese enterprises are also diversifying their global footprint, shifting investment beyond North America and Europe toward ASEAN, the Middle East, and Latin America. Recent analyses show that these regions are attracting a growing share of China's outbound capital as companies seek new growth markets and lower regulatory friction, a trend reflected in UNCTAD's World Investment Report 2025[10].

These regions offer both lower regulatory friction and younger, mobile-first consumer bases aligned with Chinese brands' digital strengths – but also require deeper cultural fluency, policy awareness, and local know-how to scale effectively.

TP INSIGHT

"The new wave of ChuHai growth is not measured in capital alone. It's measured in confidence. The confidence to compete through intelligence, agility, and customer experience."

Joseph Wai
Executive Chairman & CEO, TP China

KEY TAKEAWAYS

- **China's outbound growth is shifting from scale to strategy.** Investment quality, sustainability, and CX-driven competitiveness now outweigh pure expansion volume.
- **Emerging regions are reshaping the ChuHai map.** ASEAN, the Middle East, and Latin America are becoming priority destinations for Chinese capital and digital services.
- **Confidence and capability define the next phase.** Brands that pair strategic clarity with local insight, adaptability, and partnership ecosystems will lead the 2026 ChuHai wave.

2 AI and Digital Transformation in Global CX

AI moves from pilot to production, redefining scalability and CX experience across global operations.

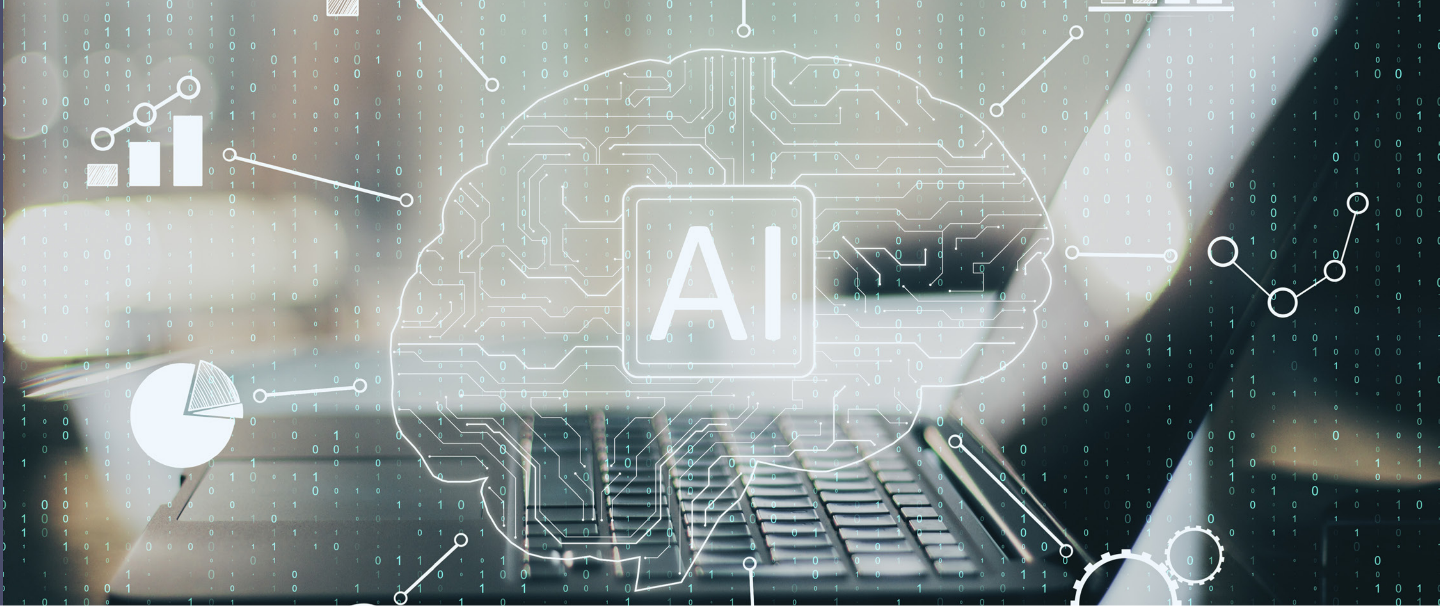
Artificial intelligence has become the central operating system of global CX. Gartner highlights that AI is rapidly reshaping customer service, with the firm predicting that by 2028, at least 70% of customers will use a conversational AI interface to begin their service journey, signaling the mainstreaming of AI-mediated interactions[11]. IDC, meanwhile, forecasts that global spending on AI-centric systems will exceed US$300 billion by 2026, growing at a 26.5% CAGR, with customer-facing applications such as augmented customer service agents among the largest areas of investment[12].

Among Chinese outbound firms, TP's experience shows that Chinese outbound brands are rapidly expanding enterprise AI adoption, using it to streamline global operations, enhance decision-making through predictive analytics, improve multi-market adoption, and strengthen governance and quality assurance across regions.

AI's greatest strength lies in augmenting and orchestration, not replacing, human service. When integrated intelligently, AI becomes the connective layer across global operations.

AI enables organizations to anticipate needs, route interactions intelligently, surface context instantly, and orchestrate the entire customer-facing experience across regions.

Rather than automating tasks in isolation, AI acts as an operating layer that harmonizes people, processes, and data to deliver better global engagement.



EXAMPLE

A leading e-commerce client partnered with TP to deploy a cloud-based, AI-powered solution integrating guided conversations, a multilingual comprehension engine, and knowledge-supported interactions. This seamless, scalable setup enabled intelligent triage, routing, and resolution across markets resulting in culturally attuned engagement, ~30% faster response times, and improved resolution efficiency.

TP INSIGHT

"AI fluency – the ability to orchestrate people and processes through technology – will define the ChuHai global leaders of the next decade."

Romeo Solas
VP Transformation, TP APAC.

KEY TAKEAWAYS

— **AI is now mission-critical for global CX.** Adoption has shifted from experimentation to enterprise orchestration, driving measurable gains in scale, consistency, and the ability to adapt quickly across markets.

— **Human + AI integration defines success.** Leading ChuHai brands use AI to augment human judgment and enhance cultural relevance, rather than replace the human connection that builds trust.

— **Readiness gaps remain.** Cross-market AI deployment is still evolving for many enterprises, creating room for organizations that advance faster to differentiate through consistency and scale.

3 Winning CX Strategies for Global Expansion

Customer experience has become the new growth currency for ChuHai brands.

Across industries, experience leadership has become a more reliable predictor of growth than product innovation alone.

McKinsey notes that companies that excel in customer experience consistently achieve higher revenue growth and stronger profitability than their peers, as superior journeys drive deeper engagement, loyalty and lifetime value[13].

For ChuHai brands, this means mastering three strategic imperatives:

1 End-to-end journey design

Mapping the customer journey across markets ensures consistency and cultural relevance along with seamless experience across markets.

2 Omnichannel integration

Omnichannel integration has become a powerful driver of customer retention and loyalty. Brands that deliver a unified online-offline experience benefit from deeper engagement, more consistent interactions and stronger long-term customer relationships, as integrated journeys link marketing, commerce, community and care into a single, reinforcing experience.

3 Empowered local teams

TP internal data shows that multilingual, cross-trained teams deliver better first-contact resolution, which means faster, more accurate, and more culturally fluent support directly driving satisfaction and retention.

EXAMPLE

A TP client in the technology sector re-engineered its global customer support, unifying voice, chat, and social care channels. Result: ~30% faster resolution and an +18 NPS uplift – improvements that strengthened loyalty and contributed to measurable commercial gains across several markets.

TP INSIGHT

"Experience is the frontier where global ambition meets local reality. The brands that lead with empathy, backed by data, will own the global customer relationship."

Daniel Wei

SVP Infinity, TP APAC

KEY TAKEAWAYS

— **CX excellence drives growth.** Brands that prioritize customer experience achieve higher revenue growth.

— **Integration and empowerment are critical.** Seamless journeys and culturally fluent teams supported by AI and insight create loyalty and operational resilience.

— **Data and empathy must co-exist.** The next generation of ChuHai leaders will balance AI-driven intelligence with human-centered, locally attuned CX design.

4 Compliance and Trust Without Borders

Regulation has evolved from a constraint to a catalyst for sustainable expansion.

With data-privacy, ESG, and consumer-protection regulations proliferating worldwide, compliance has shifted from a cost center to a critical driver of credibility and market acceptance. For global brands, cross-border transactions increasingly involve navigating overlapping regulatory regimes, making strong compliance capabilities an enabler of speed, trust, and sustainable market entry.

Companies that build proactive, integrated compliance frameworks consistently expand more effectively, avoid regulatory disruption and strengthen long-term resilience.

For ChuHai brands, building "trust by design" into their entire operating system is now a competitive necessity.

TP brings together experts from legal, security, compliance, IT, and operations to embed governance, cybersecurity, and data-privacy controls across customer, commerce, and content workflows. This cross-functional approach transforms compliance from a reactive obligation into a proactive enabler of global growth.

Example

A TP client in the financial-services sector deployed an AI-assisted system ensuring adherence to GDPR and local data regulations, cutting compliance incidents by 45% year-on-year and improving regulatory alignment across markets.

TP INSIGHT

"Trust has become the universal business language. Embedding compliance into every part of the operating model and CX design, accelerates growth, builds loyalty, and protects reputation."

Alexander Volkerding,

Information Security Vice President,
TP North America, Philippines & APAC

KEY TAKEAWAYS

— **Compliance is now a growth accelerator.** Robust frameworks enable faster, safer market entry and strengthen brand reputation.

— **Trust by design creates competitive advantage.** Integrating governance and data-privacy principles across all customer-facing and operational domains turns compliance into a differentiator.

— **Regulatory complexity demands partnership.** ChuHai brands that collaborate with global compliance and CX experts will navigate multi-market environments more efficiently.

5 Localization as a Growth Engine

Cultural fluency is now as valuable as operational efficiency and increasingly the deciding factor in global competitiveness.

The most successful global Chinese brands are those that speak not just new languages, but new cultures. Deep cultural localization, adapting products, content, service and community engagement to local expectations, has become one of the strongest drivers of customer retention and advocacy in overseas markets.

Brands that invest in cultural fluency consistently build deeper trust, stronger loyalty and more active fan communities than those relying on standardized, one-size-fits-all global approaches.

Effective localization extends far beyond translation; it encompasses product-market fit, brand expression, service expectations, emotional nuance, and trust cues.

TP's multilingual global delivery frameworks enable Chinese clients to deliver service in 300 languages across 170+ markets, combining global systems with local insights and cultural fluency.

Example

A leading Chinese cross-border marketplace scaled rapidly across Europe, including Türkiye, Russia, and key Eastern European markets. TP supported this expansion by setting up a regional service hub in Europe with culturally fluent teams. The model delivered measurable impact, customer satisfaction rose by +12pp and advocacy strengthened, demonstrating how localization accelerates both trust and growth.

TP INSIGHT

"Localization isn't about changing the message; it's about ensuring the message feels native and authentic. Cultural understanding is a core engine of sustainable global growth."

Mohamed Tawfik
CEO, TP Egypt

KEY TAKEAWAYS

— **Cultural connection drives loyalty.** Brands that localize beyond language achieve higher retention.

— **Localization is strategic, not cosmetic.** True success depends on adapting product experience, communications, service expectations, and community engagement.

— **Global scale requires cultural depth.** Local teams paired with global systems create the foundation for borderless growth.

6 Sector Spotlights

Different industries, one constant:
Global Relevance demands operational excellence.

E-Commerce & Retail

Cross-border digital retail remains one of China's most dynamic export engines. According to recent data, China's cross-border e-commerce trade reached RMB 2.38 trillion in 2023, with exports rising 19.6% year-on-year to RMB 1.83 trillion, underscoring the accelerating role of digital commerce platforms in driving outbound growth[14].

TP data shows bilingual support and local payment integration boost conversion by ~25% . Success increasingly depends on frictionless commerce operations including local payments, fulfillment responsiveness, trust & safety, and culturally relevant engagement which directly influence conversion and loyalty.

EV & Mobility

The latest IEA Global EV Outlook 2025 shows that China now accounts for around 40% of global electric-vehicle exports, reflecting its growing weight in the global automotive supply chain[15].

As competition intensifies, differentiation is shifting from product innovation to post-sale experience and brand trust. Local service infrastructure, technical support and community reputation increasingly determine buyer confidence in overseas EV markets, making customer experience a critical driver of long-term competitiveness.

Media & Entertainment

PwC's Global Entertainment & Media Outlook 2025–2029 highlights the strong global growth of digital content industries, with video game revenues alone projected to rise from US$224 billion in 2024 to around US$300 billion by 2029[16]. Chinese gaming and streaming firms are well positioned in this expansion:

those that localize storytelling, community management and in-market engagement are achieving breakthrough traction with overseas audiences.

Across all sectors, operational resilience, localization depth and trust have become the critical levers of sustainable global growth.

TP INSIGHT

" Across industries, one constant remains: brands achieve global relevance when operational excellence turns their promise into everyday reality. The ones that deliver trust, consistency, and locally resonant experiences will define the next wave of ChuHai leadership."

Dr. Anubha Upadhyay

SVP Marketing & Sales, TP APAC

KEY TAKEAWAYS

— **Operational Excellence defines sector leadership.** Whether in retail, mobility, or media, customer experience maturity is now the deciding factor in global competitiveness.

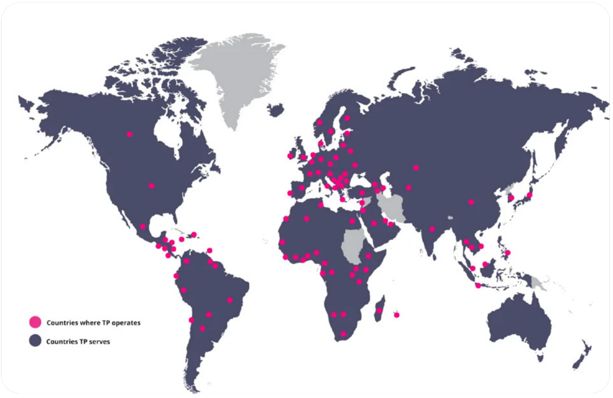
— **E-commerce remains the growth front-runner.** Digital retail expansion continues at double-digit rates, supported by AI-driven service and localization.

— **EV and media sectors highlight the importance of brand trust and engagement.** As Chinese EVs and digital content expand overseas, success increasingly depends on post-sale service, local reputation, and culturally localized experiences that keep customers and audiences engaged.

7 Looking Ahead: The ChuHai Outlook 2026

As China's outbound expansion matures, the ChuHai movement is shifting from speed to sophistication.

Growth in 2026 will be defined not only by market entry, but by how effectively brands integrate intelligence, compliance, and local relevance into their operations. The ChuHai Global Outlook 2026 identifies five macro trends shaping this next phase – and introduces the inaugural **TP ChuHai Confidence Index (CCI)**, a composite measure of optimism and readiness among Chinese brands expanding abroad.



1 The Global Expansion Reset

After two years of volatility, globalization is recalibrating rather than retreating.

China's outward investment continues to expand, with firms prioritizing more sustainable, capability-led growth rather than scale alone. UNCTAD's World Investment Report 2025 highlights a clear diversification trend, with Chinese investors shifting capital away from traditional markets in North America and Europe toward ASEAN, the Middle East and Latin America, reflecting a more risk-balanced and opportunity-driven approach to global expansion[17].

Outbound growth is increasingly driven by tech-enabled companies seeking global reach through lighter, more flexible operating models rather than heavy infrastructure footprints.

TP INSIGHT

"The next phase of ChuHai isn't defined by size but by agility. Chinese brands are learning to go global in smarter, more capital-efficient and operationally resilient ways, balancing ambition with operational resilience."

Kevin Xu,

General Manager of Infinity, TP China

2 AI as the Core of Global Competitiveness

Artificial intelligence has evolved from pilot implementations to a foundational driver of global competitiveness.

A Gartner survey published in December 2024 reported that 85% of customer service leaders expected to explore or pilot customer-facing conversational GenAI in 2025, underscoring how quickly AI has become embedded in service and support operations worldwide[18].

Among China's outbound brands, AI-enabled capabilities such as conversational interfaces, predictive analytics and automation are increasingly being deployed in overseas markets, helping improve responsiveness, personalization and overall customer experience performance.

3 Trust and Regulation as Growth Catalysts

As data-sovereignty, privacy and consumer-protection laws proliferate worldwide, compliance has become a critical differentiator for global expansion.

Organizations operating across borders increasingly face overlapping regulatory regimes, making governance a source of strategic advantage rather than a procedural obligation. PwC's Global Compliance Survey highlights how companies that invest early in robust compliance capabilities achieve stronger risk resilience, smoother market entry and greater stakeholder trust[19].

However, although AI delivers scale, personalization, and insight, its true power lies in augmenting human judgment and strengthening culturally relevant engagement.

For ChuHai enterprises, governance is no longer only a legal necessity, it has become a brand asset that shapes credibility, partnership readiness and long-term market viability.

TP INSIGHT

"AI fluency, the ability to harmonize technology and human understanding, will separate global leaders from local players. The most successful ChuHai brands will make AI invisible to the customer but invaluable to the experience."

Danny Kuivenhoven,

Chief Technology Officer, TP EMEA & APAC

TP INSIGHT

"Trust is the new trade route. Building compliance into the DNA of CX delivery doesn't just reduce risk, it accelerates entry, unlocks partnerships, and earns long-term loyalty."

Leah Zheng,

COO, TP China.

4 The Localization Premium

Cultural proximity is emerging as a decisive competitive advantage.

Brands that invest deeply in localization, adapting language, tone, service style, and in-market experience, consistently build stronger trust, retention and advocacy in overseas markets.

As global competition intensifies, localization is expected to become even more critical in 2026, often outweighing speed and price in sectors such as retail, digital services, media and mobility, where customer expectations are shaped by cultural norms and local behavior patterns.

5 Collaboration as a Growth Multiplier

Partnership is becoming a new superpower of Chinese globalization.

Outbound brands are increasingly collaborating with local service providers, technology partners and ecosystem platforms to accelerate market entry, strengthen localization and build trust in new markets. Co-built strategies enable faster capability acquisition, reduce execution friction and support more sustainable scaling, making partnership a core lever of long-term international success.

TP INSIGHT

"Localization isn't translation, it's transformation. Brands that build authentic, locally resonant experiences will be rewarded with trust that transcends language."

Joseph Wai,

Executive Chairman & CEO, TP China

TP INSIGHT

"No brand goes global alone. The ChuHai leaders of 2026 will be those who co-create, with partners who understand the local pulse and the global opportunity."

Yongqing Li,

VP Business Development China Bridge, TP EMEA

Introducing the TP ChuHai Confidence Index

As Chinese brands enter a more sophisticated phase of global expansion, understanding confidence and readiness has become as important as tracking outbound investment volumes or market entry counts.

To quantify this shift, TP has developed the **TP ChuHai Confidence Index (CCI)**, a proprietary, evidence-led framework designed to assess the preparedness of Chinese outbound enterprises as they scale internationally.

Rather than focusing on ambition alone, the CCI evaluates the operational foundations that increasingly determine global success.

What the CCI Measures

The index assesses outbound confidence across four interconnected dimensions:

—Market Opportunity

The strength of sector demand, global growth momentum, and structural tailwinds supporting overseas expansion.

—Compliance Maturity

Preparedness for multi-market regulatory environments, including data protection, privacy, payments, content governance, and consumer-protection requirements

—CX Readiness

The maturity of global customer-experience operations, including digital capability, AI adoption, omnichannel integration, and multilingual service readiness.

—Localization Capability

The depth of cultural, linguistic, and operational adaptation across overseas markets, extending beyond translation to service style, trust cues, and local engagement.

Each dimension is scored on a 1–10 scale, with the composite CCI score calculated as the average of the four indicators.

CCI 2026 Headline Result

Based on analysis of TP's outbound client portfolio across high-growth sectors, including e-commerce, consumer technology, mobility, digital entertainment, fintech, and cloud infrastructure:

TP ChuHai Confidence Index 2026: 7.8 / 10

Moderate–High Confidence

This score reflects strong global growth momentum and improving operational maturity, balanced by rising regulatory complexity and uneven compliance readiness across markets.

What the 2026 CCI Reveals

—Market Opportunity Is Exceptionally Strong

Across the portfolio, Market Opportunity scores are the highest-rated dimension, driven by structurally high-growth sectors such as cross-border e-commerce, digital platforms, cloud services, premium consumer electronics, and digital content.

This confirms that the demand side of ChuHai remains robust, even as global conditions become more complex.

—CX Readiness Is Solid, but Uneven

Most outbound brands now operate with digital-first service models and are accelerating the adoption of AI, automation, and data-driven decision-making across global operations.

However, readiness varies by organization and region. While leading brands demonstrate advanced orchestration of AI-enabled, multilingual CX at scale, others are still transitioning from region-by-region execution to fully integrated global models.

This gap highlights why CX maturity has become a key differentiator, rather than a baseline capability.

—Compliance Is the Primary Constraint on Confidence

Compliance maturity is the lowest-scoring dimension across the index.

Even globally experienced brands face challenges navigating overlapping data, privacy, payments, and content regulations across jurisdictions. As regulatory scrutiny intensifies, compliance readiness increasingly determines speed to market, partner trust, and long-term resilience.

This finding reinforces a central theme of the Outlook: compliance is no longer a barrier to growth, it is becoming a competitive accelerator.

—Localization Capability Is Strengthening

Localization scores indicate meaningful progress across the portfolio. Many outbound brands now invest in culturally fluent service models, local teams, and market-specific engagement strategies.

However, localization depth remains uneven, particularly among centralized or product-led organizations. As global competition intensifies, cultural fluency is emerging as a decisive advantage, especially in consumer-facing sectors.

Sector Sentiment Snapshot

The CCI also highlights variation by sector:

E-commerce & Retail — 8.1

Strong confidence driven by digital exports, AI-enabled operations, and mature localization playbooks.

EV & Mobility — 7.9

Innovation leadership and manufacturing strength offset by increasing regulatory and compliance complexity.

Media & Entertainment — 7.4

Significant cultural opportunity balanced against IP protection, content governance, and platform regulation challenges.

Why the CCI Matters

The TP ChuHai Confidence Index moves the globalization conversation beyond speed and scale. It provides a **practical lens** through which Chinese brands can assess what truly enables sustainable international success:

- Operational maturity
- Customer experience consistency
- Regulatory preparedness
- Cultural relevance

The CCI will be **updated biannually**, serving as an ongoing barometer of outbound momentum and readiness as the ChuHai landscape continues to evolve.

A detailed explanation of the methodology and scoring framework is provided in the Appendix.

Conclusion: Building Borderless Growth

The ChuHai movement has entered a new stage of sophistication.
The next generation of Chinese global brands will compete not only on price or innovation, but on **experience, trust, operational agility, and cultural empathy** – the capabilities that consistently define sustainable international success across this report.

"2026 represents an inflection point," says Assaf Tarnopolsky, Chief Business Development and Customer Officer, TP APAC. "Technology, trust, and talent are converging. At TP, our mission is to empower Chinese brands to **thrive globally, through intelligent, compliant, and human-centered customer experiences** that define the next era of borderless growth."

Appendix

Methodology & Sources

This report draws on a combination of verified public data, academic research, and TP proprietary insights.

TP Chuhai Confidence Index Methodology

Methodology Overview

The TP ChuHai Confidence Index (CCI) is a composite, directional index designed for thought leadership and market insight purposes. It does not audit or rank individual companies, nor does it rely on confidential client data.

Instead, it applies a structured expert-assessment methodology, commonly used in global confidence and maturity indices, combining:

- Sector-level benchmarks
- Publicly observable operating behaviors
- Regulatory exposure patterns
- TP's aggregated, anonymized operational insight

Scoring Framework

Each dimension is scored on a 1–10 scale:

- 1–4: Early-stage maturity
- 5–7: Developing to strong capability
- 8–10: Advanced or leading maturity

Market Opportunity

Assessed based on sector growth outlook, outbound investment trends, and competitive tailwinds.

CX Readiness

Evaluated through observable digital maturity, AI deployment patterns, omnichannel integration, and multilingual operational capability.

Compliance Maturity

Assessed via regulatory exposure, governance complexity, and the presence of structured compliance frameworks across markets.

Localization Capability

Measured through evidence of cultural adaptation, local operating models, language support, and market-specific engagement strategies.

Composite Score Calculation

The overall CCI score is calculated as:

(Market Opportunity + CX Readiness + Compliance Maturity + Localization Capability) ÷ 4

This ensures a balanced, transparent, and repeatable structure.

Portfolio-Level Results (Anonymized)

Across the analyzed outbound client portfolio:

Average Market Opportunity: 8.5

Average CX Readiness: 7.4

Average Compliance Maturity: 6.2

Average Localization Capability: 7.2

Composite Portfolio Score: 7.82 → rounded to 7.8

Data Sources & Validation

The CCI draws on

- Public global datasets (UNCTAD, IMF, IEA, PwC, McKinsey, Gartner, Statista)
- TP proprietary benchmarks (CX Digital Readiness, CX Performance Benchmarks)
- Aggregated, anonymized client-portfolio insights
- Expert interpretation of sector-level globalization maturity

The index is designed to be directional and comparative, supporting insight-led discussion rather than performance evaluation.

References

1. https://www.gartner.com/en/newsroom/press-releases/2024-12-09-gartner-survey-reveals-85-percent-of-customer-service-leaders-will-explore-or-pilot-customer-facing-conversational-genai-in-2025
2. https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/experience-led-growth-a-new-way-to-create-value
3. https://www.pwc.com/gx/en/issues/risk-regulation/global-compliance-survey.html
4. https://www.iea.org/reports/global-ev-outlook-2025/trends-in-the-electric-car-industry-3
5. https://www.china-briefing.com/news/chinas-cross-border-e-commerce-2023-performance-and-2024-outlook
6. https://www.pwc.com/gx/en/news-room/press-releases/2025/pwc-global-entertainment-media-outlook.html
7. https://www.mofcom.gov.cn/tjsj/gwjjhztj/art/2025/art_af4b0ccaa11f45ac89b7e718fe889aef.html
8. https://www.scmp.com/economy/china-economy/article/3335880/chinas-2025-growth-forecast-raised-5-imf-citing-resilience
9. https://www.jetro.go.jp/ext_images/hungary/pdf/globaltradeandinvestmentreport2025.pdf
10. https://unctad.org/publication/world-investment-report-2025
11. https://www.gartner.com/en/articles/customer-service-ai
12. https://www.businesswire.com/news/home/20220912005203/en/Worldwide-Spending-on-AI-Centric-Systems-Will-Pass-%24300-Billion-by-2026-According-to-IDC
13. https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/experience-led-growth-a-new-way-to-create-value
14. https://www.china-briefing.com/news/chinas-cross-border-e-commerce-2023-performance-and-2024-outlook
15. https://www.iea.org/reports/global-ev-outlook-2025/trends-in-the-electric-car-industry-3
16. https://www.reuters.com/business/media-telecom/ai-powered-ads-drive-growth-global-entertainment-media-industry-pwc-says-2025-07-24
17. https://unctad.org/publication/world-investment-report-2025
18. https://www.gartner.com/en/newsroom/press-releases/2024-12-09-gartner-survey-reveals-85-percent-of-customer-service-leaders-will-explore-or-pilot-customer-facing-conversational-genai-in-2025
19. https://www.pwc.com/gx/en/issues/risk-regulation/global-compliance-survey.html

About TP

TP is the global leader in digital business services, combining AI technology with human empathy to deliver exceptional customer experience.

With operations in **170+ markets** and expertise in **300 languages**, TP partners with China's fastest-growing brands to **accelerate their global expansion** through trusted customer experience, digital innovation, and local market intelligence.

tp.com