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RCS: Igniting business messaging with rich conversations



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Summary

RCS is poised to grow revenue for enterprises and telcos

Apple's forthcoming support of rich communication services (RCS) on iOS 18 signals a brighter future for the telco-based rich messaging service—and for enterprises' interaction with their customers. RCS has been around for a while, but its 15-year history has seen patchy support among telcos and other messaging players, fragmented rollouts, and a general hesitancy from telcos to cannibalize their application-to-person (A2P) SMS revenue. These barriers have so far suppressed RCS, but this is all about to change. Apple's upcoming support fills in a vital missing piece: the universality of RCS across devices.

As a business-to-consumer messaging channel, RCS delivers significant benefits for enterprises. The most important feature for both enterprises and consumers is the verified sender, where each message is branded with the enterprise's logo, and the sender (the enterprise) is verified by the carrier, enhancing consumer trust in the message.

RCS also enables media-rich messages and more engaging two-way interactions with consumers via chatbots. The RCS feature set means it can more effectively compete with messaging apps as a business-to-consumer (B2C) communications channel, with the extra advantage of being a trusted telco messaging service. It may not achieve the same global reach as SMS, but it will come a close second, and being a universal, native messaging channel, it is poised to exceed the addressable market for any single messaging app, including WhatsApp. The combination of these complementary telco messaging services will provide enterprises with the at-scale business messaging channels they need to address multiple use cases across industry verticals.

Meanwhile, telcos have seen their person-to-person (P2P) SMS traffic and revenue decline. They will see their A2P (a.k.a B2C) SMS traffic and revenue follow suit as messaging apps focus on also embedding themselves among enterprises as a customer engagement communications channel. Telcos are realizing they need to work with other telcos and the wider messaging ecosystem to drive awareness of RCS among enterprises and consumers, including how to use RCS and the benefits it offers compared to SMS and MMS. They are also realizing that they need to align on pricing models for RCS. Doing so provides commercial certainty for enterprises exploring the use of RCS for customer engagement; this will also ultimately help drive the growth of RCS as a business messaging channel.

This white paper provides a concise overview of RCS, contextualizing it as a necessary and important channel in any business communication strategy. RCS opens richer, more interactive use cases, enabling new use cases over SMS.

RCS: An overview

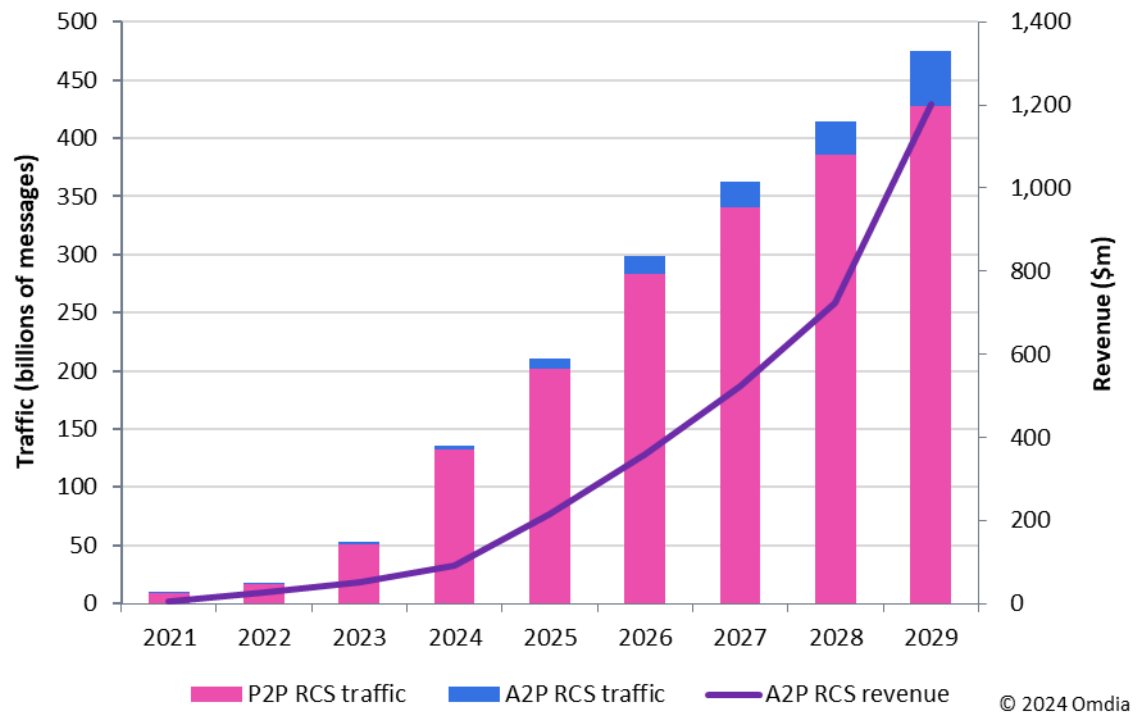
RCS: The rich messaging upgrade to SMS

Rich communication service (RCS) is the next iteration of the telco messaging service, SMS. Like SMS, RCS is a GSM Association (GSMA) communications standard. Unlike text-based SMS, however, RCS will enable consumers and businesses to send and receive rich messages via a data connection or Wi-Fi using the standard SMS inbox. Apple will support RCS from its iOS 18 software update, which is due to roll out in September 2024. This development has been long-awaited, since without RCS support on iPhones, it could not be a true successor to SMS. When this happens, Omdia estimates that RCS will immediately have a cross-platform reach (i.e., across Android devices and iPhones) of an estimated 2.5 billion monthly active users (MAUs)—representing a global addressable market of consumers that is close to WhatsApp’s estimated global MAU user base of 2.8 billion in 2024.

A key advantage of RCS for consumers is that they do not need to download a messaging app like WhatsApp to send and receive photos or videos. Enterprises can use RCS to send richer communications to their customers and to verify their brand as the sending identity. For enterprises, rich messages can be as simple as sending an image alongside some marketing text. The messages can be more interactive—for example, they could include buttons that allow consumers to send a quick reply, open a web link, or dial a phone number. Finally, they can also be conversational, such as using an RCS chatbot to engage in a transactional journey with a consumer (e.g., purchasing a product). RCS represents a significant functional enrichment of SMS, with a high potential to deliver improved KPIs on enterprises’ marketing and sales campaigns, enhanced and trusted consumer experiences, and higher-quality customer engagement.

Since P2P RCS is being rolled out to consumers at a much faster pace than A2P RCS, Omdia forecasts that P2P traffic will make up the vast majority of RCS traffic over the next five years (see **Figure 1**). However, A2P RCS will see steady growth and generate revenue of \$4.2bn by 2029. This is much smaller than A2P SMS revenue, which will total \$51.3bn in 2029, but A2P SMS revenue is flatlining while A2P RCS is on the cusp of breaking into the business messaging market.

Figure 1: Global A2P RCS traffic and revenue, 2021–29



Source: Omdia

RCS allows for much more diverse message types than SMS. Business models will likely coalesce around three messaging types (see **Figure 2**). Text-based and simple media messages will be sold at a similar price point to SMS and MMS. Rich media messages will be priced at a premium, and conversational messages will command a higher premium, which will depend on how telcos define a session. Business models will differ across markets, but the consistency of models within a country will make it easier to sell RCS to enterprises.

Figure 2: RCS message types



Basic: A2P RCS messages that are either text-based or branded with a brand or logo to verify the sender. These messages are upgrades to SMS messages.



Single: Messages that include richer media than a simple image. Examples include messages with actionable marketing, advertising, and location sharing, and the use of carousels and videos in messages.



Conversational: Messages that enable two-way interactions between brands and consumers. Examples include conversational commerce; location sharing for receiving special offers, finding a nearby store, or being located for purposes of receiving assistance; and two-way technical support/troubleshooting (e.g., sending how-to videos).

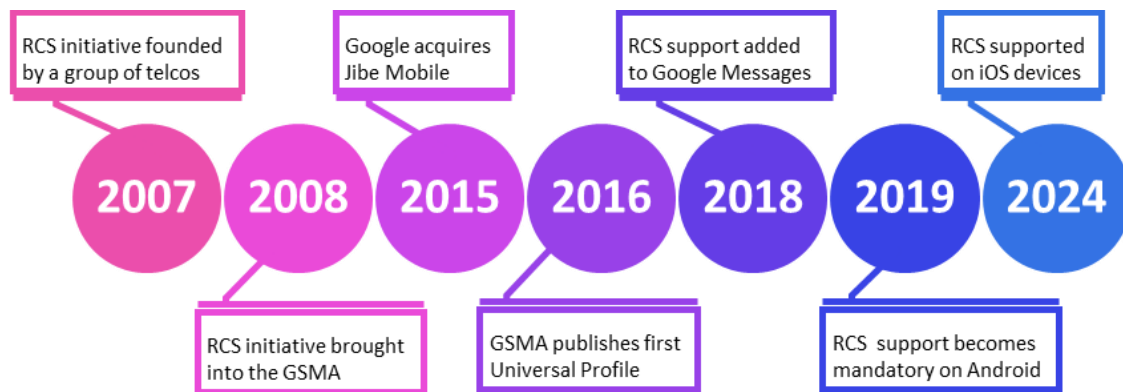
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Source: Omdia

Google Messages takes RCS mainstream on Android

Google has played a key role in the growth of RCS since 2016, when it acquired the RCS channel and hosting vendor Jibe Mobile (see **Figure 3**). The Jibe platform allows telcos to deploy hosted RCS services, meaning they do not need to invest in their own RCS infrastructure—reducing deployment costs and minimizing risk. The acquisition of Jibe allowed Google to position itself as a leader in the RCS ecosystem, alongside the GSMA. For instance, Google worked with the GSMA to produce the first Universal Profile to tackle RCS fragmentation.

Figure 3: RCS timeline



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Source: Omdia

Google was able to intervene in the P2P RCS market with Google Messages, bypassing telcos, primarily because telcos accepted that they would not generate significant revenue from it. Consumers were already used to free messaging via apps and unlimited messaging plans. However, Google has chosen not to do the same with A2P RCS. Instead, Google has chosen to work with the telcos on their deployments of A2P RCS to keep RCS as a telco-operated messaging service rather than just another over-the-top (OTT) messaging channel.

Apple support is a vital step forward for RCS universality

Until November 2023, Apple steadfastly insisted it would not add RCS support to iOS. Apple Messages seemed destined to remain a walled garden, with consumers having to use third-party apps (such as WhatsApp or Messenger) to reach their friends with rich media or to fall back to SMS or MMS. It also meant enterprises would have to use Apple Business Messaging or another messaging app to target iOS device owners with rich media and interactive messages.

With the addition of Apple support, RCS will be the new universal messaging channel and a true evolution of SMS. The universal availability of RCS across devices has the potential to be a significant advantage for RCS over OTT messaging apps.

RCS business messaging enhances B2C communications

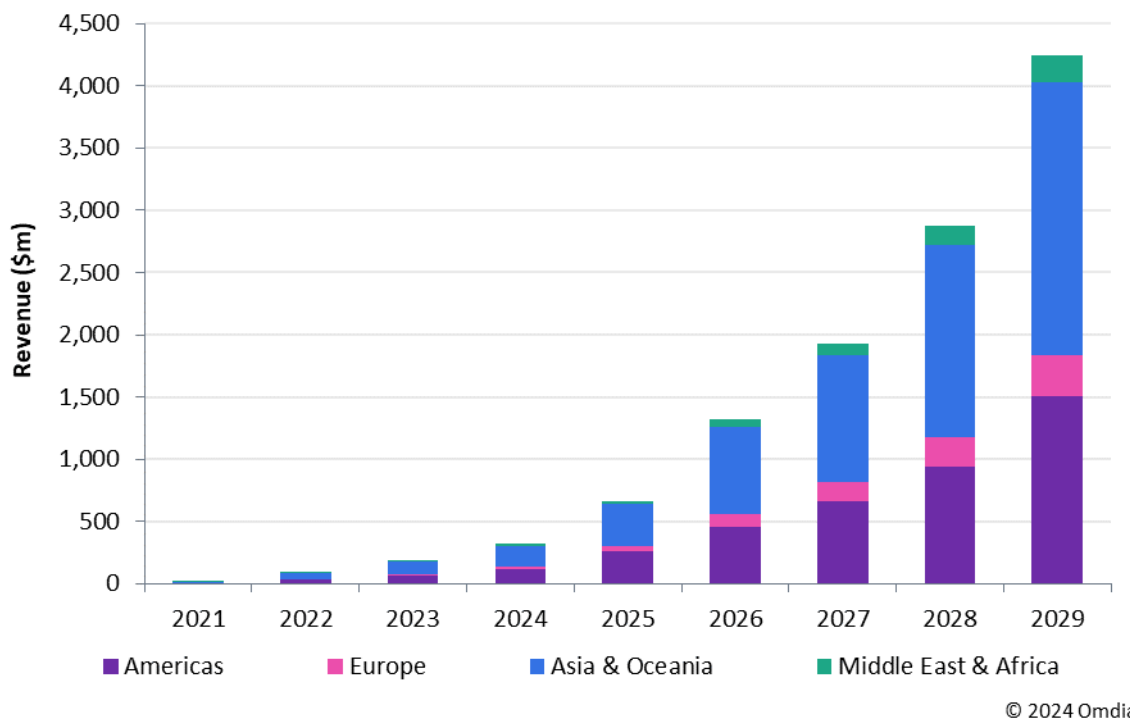
RCS plays a key role in the future of business messaging

RCS Business Messaging (RBM) will breathe fresh life into telco messaging options for enterprises. RCS offers enterprises the ability to enable a more interactive and engaging customer experience with rich features like:

- Verified sender
- Pictures and videos
- Interactive menus and carousels
- Read receipts
- Typing indicators
- Chatbot support
- Advanced analytics

The above features will make RCS a business messaging hero. Omdia expects to see global A2P RCS revenue of **\$4.2bn** by 2029, up from just **\$317m** in 2024, representing a CAGR of 68%. A2P RCS traffic will also increase significantly over the forecast period, from just **12 billion** messages in 2024 to **138 billion** in 2029. The installed base will grow from **666 million** in 2024 to **1.5 billion** in 2029. The installed base for A2P RCS represents those who own RCS-capable devices connected to a network that has enabled A2P RCS; this installed base will send and receive a rapidly increasing amount of traffic over the next five years. Figures 4 and 5 demonstrate the speed with which global A2P RCS revenue and traffic will grow by 2029.

Figure 4: Global A2P RCS revenue by region, 2021–29



Source: Omdia

Omdia sees two regions as the primary drivers of A2P RCS traffic and revenue over the coming years: the Americas and Asia & Oceania. In the Americas, A2P RCS revenue will grow from **\$113m** in 2024 to **\$1.5bn** in 2029, with A2P RCS traffic leaping from just **4.7 billion** messages in 2024 to **54 billion** messages in 2029. Omdia expects the bulk of A2P RCS traffic in the Americas to come from the US, which will see 47 billion messages sent in 2029.

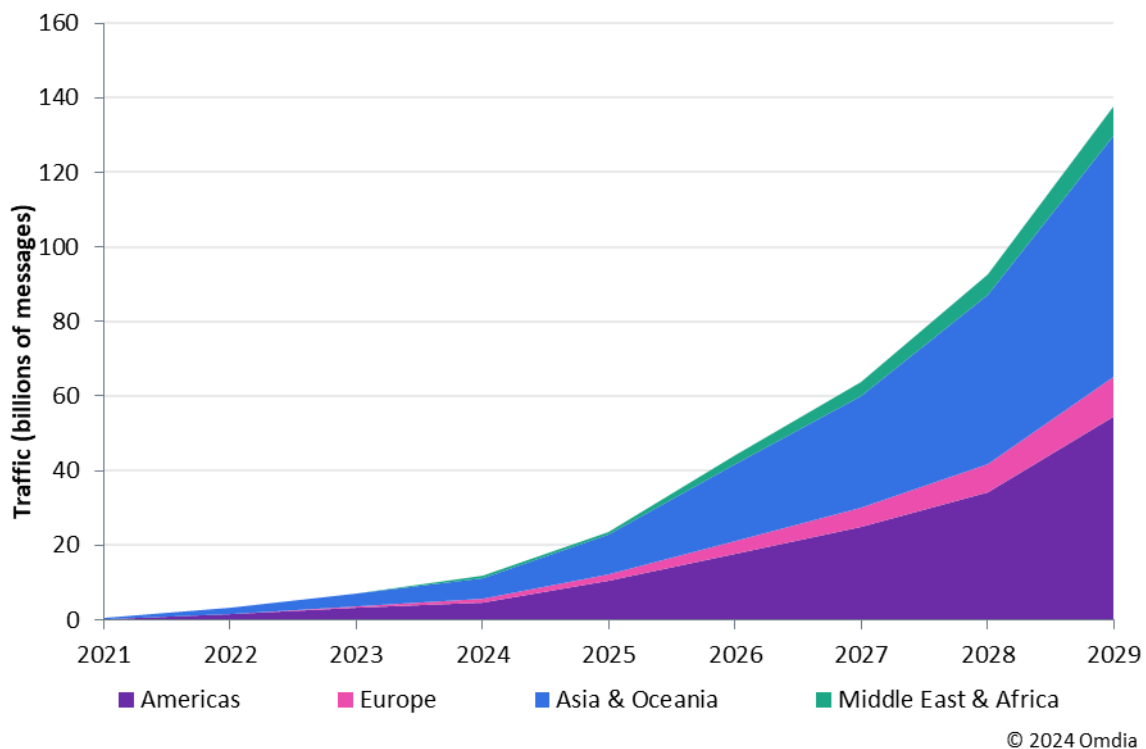
High iOS penetration in the US (37% of active mobile installed base according to Omdia's *Smartphone OS, Active Installed Base – 2Q24*) has suppressed RCS growth so far, but once enabled on iOS devices, RCS becomes a much more enticing prospect for enterprises. US consumers are also still wedded to the default messaging inbox on their phone, and remain heavy users of SMS and MMS, bucking the global trend of declining P2P and A2P SMS and MMS traffic and revenue in most countries. This means messaging apps have not gained as big a foothold in the US as they have in other countries—leaving it wide open for RCS to also become a default telco messaging channel for consumers and enterprises across iOS and Android devices in the US.

In addition, Omdia expects major brands will work with US-based global marketing platforms to develop RCS-based campaigns. These companies will act as RCS trailblazers, identifying key RCS use cases and filtering their learnings down to subsidiaries in other countries. Consequently, Omdia forecasts A2P RCS revenue in the US to reach **\$1.2bn** in 2029, with an installed base of **204 million**.

In Asia & Oceania, China is a closed shop as far as RCS is concerned, with Google (and consequently the RCS-based Google Messages) banned in that country. This means that in Asia & Oceania, India is the more interesting market. Indeed, of the **\$2.2bn** generated by A2P RCS in APAC in 2029, **\$544m** will come from India alone. A2P RCS will take hold in India due to the market's large Android penetration, which stands at 90% in 2024, according to the latest Omdia data. By 2029, India will have an A2P RCS installed base of **254 million**.

In Latin America, Brazil and Mexico are leading the way in RBM adoption, and there is already strong interest and use among enterprises like Comex (see below). A2P RCS traffic will grow to **1.3 billion** messages and **2.3 billion** messages in these countries, respectively, by 2029. A2P RCS revenue in Brazil will hit **\$130m** in 2029, up from **\$10m** in 2024, growing at a CAGR of 66%. In Mexico, revenue will grow from **\$6m** in 2024 to **\$57m** in 2029, at a CAGR of 57%.

Figure 5: Global A2P RCS traffic by region, 2021-29



Source: Omdia

Europe will see its A2P RCS installed base grow from **66 million** in 2024 to **145 million** in 2029. This growth will drive traffic from just **800 million** messages per year in 2024 to **11 billion** in 2029, at a CAGR of 69%, and revenue from **\$22m** to **\$324m**, at a CAGR of 72%. France is expected to be the largest market for A2P RCS, with revenue expected to reach **\$73m** by 2029, followed by Germany (**\$36m**), the UK (**\$28m**), and Spain (**\$20m**). France, with its 73% Android penetration compared to 67% in Germany and 68% in the UK, has an advantage in terms of its existing user base creating a

head start for RBM. Spain has a high Android penetration at 88%, but its smaller overall population makes it less of a priority for operators in rolling out RBM. Omdia expects that many of the smaller countries in Europe will be much slower to roll out A2P RCS.

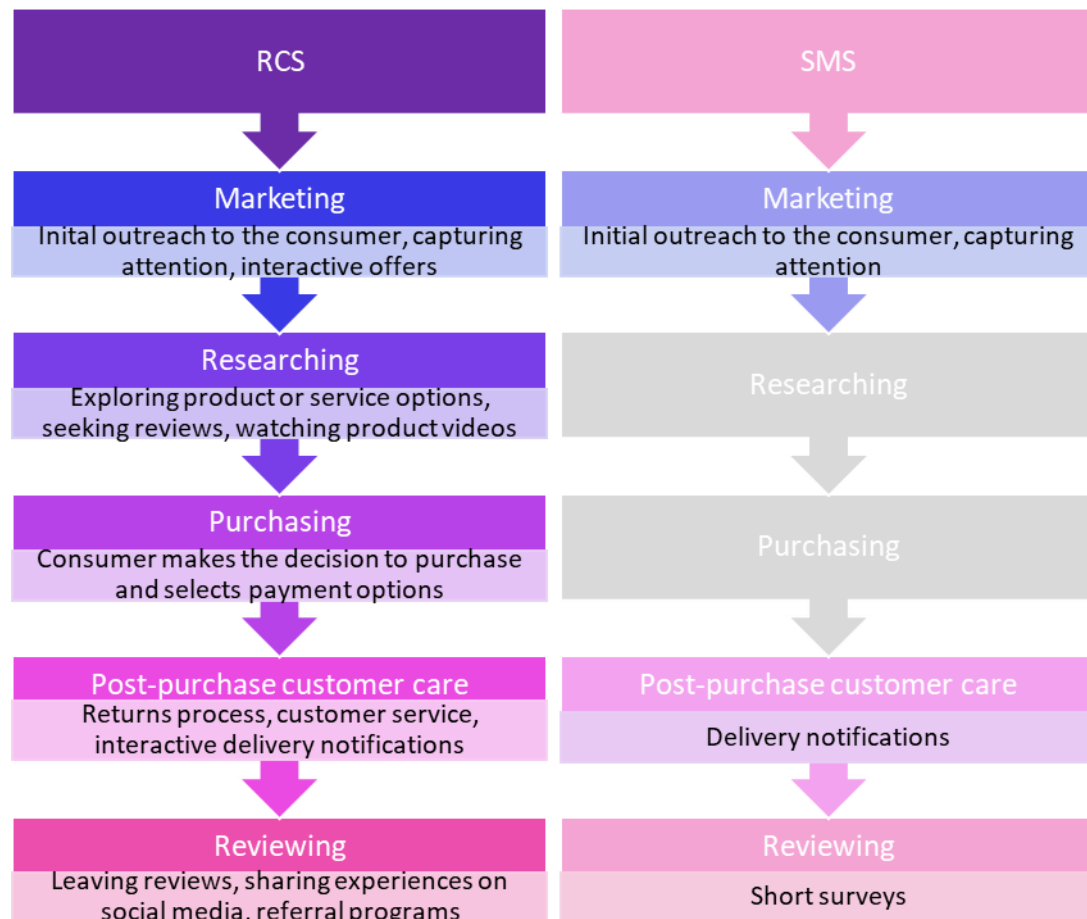
The Middle East & Africa will be the smallest region for A2P RCS, but revenue in this region will grow fastest. A2P RCS revenue in the Middle East & Africa will grow from **\$13m** in 2024 to **\$220m** in 2029, at a CAGR of 76%. Omdia expects to see lower price points per message and per conversation in the Middle East & Africa, which will keep overall revenue low. The Middle East & Africa will have a larger installed base than Europe by 2029, at **219 million**, but lower A2P RCS traffic, at **8 billion** messages per year in 2029.

A rich set of use cases for a richer communications channel

Beyond marketing to supporting the whole customer journey

SMS works very well for marketing messages when it comes to reaching the widest possible audience with reliable and speedy delivery. However, RCS gives enterprises a telco messaging option that allows them to take consumers through the entire customer journey from the initial marketing pitch right through to purchase and beyond (see **Figure 6**).

Figure 6: RCS vs. SMS through the customer journey



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Source: Omdia

Of course, enterprises can engage with their customers using messaging apps or an enterprise's own dedicated app. However, different messaging apps are popular in different countries. There is also fragmentation of messaging apps within countries—two or three apps may have similar penetration levels, which impacts the size of an app's addressable market within a country and, consequently, its accessibility to enterprises. Consumers may also be unwilling to engage with brands on their preferred messaging app, wishing to use it only for personal communications. Meanwhile, dedicated brand apps rely on consumers to download and install them on their devices.

RCS, on the other hand, will be available on almost any smartphone regardless of the operating system. With a verified sender on RCS (i.e., a verified brand), consumers can also be sure that they are having a genuine interaction with the business sending the message.

Enabling the entire user journey on one channel, RCS allows for a seamless consumer experience.

Authentication makes RCS an ideal channel for secure communications

In Omdia's view, RCS's verified sender feature is a key factor in its potential to be the messaging channel of choice for enterprises. With RCS verified sender, consumers can be sure they genuinely have received a message from their bank, and they can then respond appropriately rather than ignoring the message because they think they are being scammed. Furthermore, because the verification is carried out by telcos, which have elevated levels of consumer trust, this gives RCS an edge against any verification that messaging apps perform when onboarding enterprises to their channel.

End-to-end encryption (E2EE) for A2P RCS messages is up in the air due to Apple's decision not to use Google's solution for E2EE. However, should the GSMA add E2EE into RCS Universal Profile, then this would boost the security profile of RCS. Unlike messaging apps, however, any telco messaging service must be compliant with domestic telco regulations, which typically include lawful interception for security and law enforcement agencies.

Innovation is key to maximizing the business benefits of RCS

For businesses to get the most out of RCS, they need to explore all the channel's options. While it is sensible to start with the known use cases—such as migrating simple text-based messages or messages with a single image from SMS and MMS to RCS—businesses should experiment with the channel's richer media capabilities. Two-way, conversational messaging opens another door for enterprises looking to get the most out of business messaging. RCS features such as the following allow for a multitude of interactive and rewarding experiences:

- Adding brand colors and integrating a logo into conversations
- Sharing documents
- Videos
- Menu carousels
- Rich cards
- Maps

Looking to the future: The role of AI and GenAI in RCS

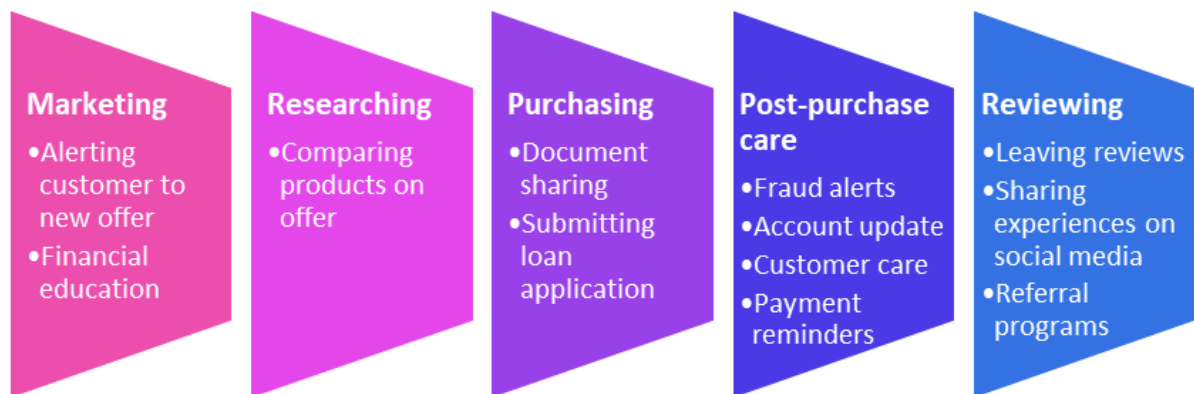
Personalization moves a marketing campaign from generic to highly relevant and is exceptionally engaging for consumers. GenAI can enable enterprises to tailor the offers they present to a consumer and how they present those offers. A business can analyze which kinds of interactions a particular consumer responds to most and use that information to personalize every experience to the individual. While a consumer might be able to fill in a survey to show how they *think* they prefer to communicate, anyone familiar with consumer behavior knows that what consumers say they prefer is not always the option they choose.

GenAI will allow enterprises to create ultra-personalized customer experiences, learning from every interaction with every individual to craft communications that are most likely to generate interest, prompt a sale, or provide enhanced customer care. And because an AI-powered chatbot can respond to conversational language, the interactions will feel genuine. This means GenAI will allow chatbots to shift from support conversations to personalized product recommendations and, from there, into a continuing cycle of customer engagement.

RCS in finance

Conversational banking allows financial institutions to turn a simple marketing campaign into an application and to provide customer service functionality within a chat. Banks can use AI to offer personalized financial advice, prompting customers to investigate additional products and services while checking on their current products. RCS conversations also enable customers to respond directly to important notifications like fraud alerts rather than having to call a customer service center.

Figure 7: RCS through the finance customer journey



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Source: Omdia

RCS in retail

A loyalty scheme run via RCS can prompt an entire user journey from initially approaching the customer with an offer right through to the review process. The user can browse products via a carousel and ask questions in the chat. That advice can prompt a sale, with order updates, review requests, and eventually more personalized offers.

Knowing what a customer has ordered, a retailer can send proactive guidance on how to use a product. Abandoned carts can be followed up not with an email but with a selection of offers tailored to the customer, who can then order directly in the conversation.

Figure 8: RCS through the retail customer journey



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Source: Omdia

RCS in travel

RCS can take a user on a communications journey before and after they've been on a trip. Starting with personalized itineraries based on previous bookings and search history, RCS then moves to destination guides, interactive carousels displaying hotel and flight options, and AI-based suggestions for added extras to increase upsell. Once a booking has been made, travel updates can be sent to customers, alerting them to flight changes, departure gates, and luggage carousel locations. Getting ahead of disruptions and offering proactive solutions can increase customer satisfaction.

Figure 9: RCS through the travel customer journey



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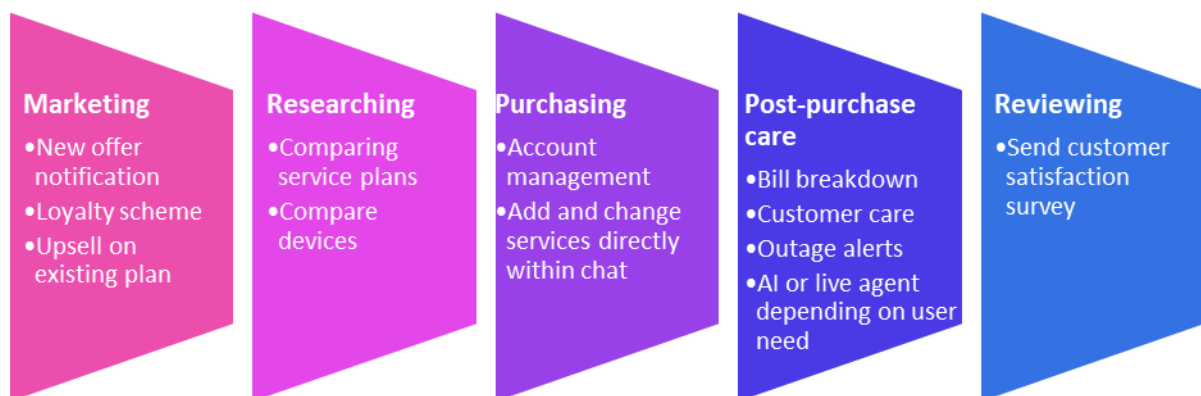
Source: Omdia

RCS in telcos

RCS is not just a means for telcos to make money. Telcos should also use RCS to communicate with their customers to get the most out of the platform. Interactive customer services and alerting customers to outages before they complain could help cut complaints. A GenAI-powered chatbot can provide personalized solutions to common problems and upsell customers with tailored offers based on existing usage.

Account management via RCS is also possible with interactive menus and carousels displaying options for new and upgraded service plans. Customers no longer need to research via the web but can do so directly within their default messaging apps.

Figure 10: RCS through the telco customer journey



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Source: Omdia

Understanding the business benefits of RCS

For enterprises: More effective marketing campaigns, enhanced customer care, and communications

RCS Business Messaging enables interesting use cases to enhance the customer journey, and it is proven to deliver higher KPIs.

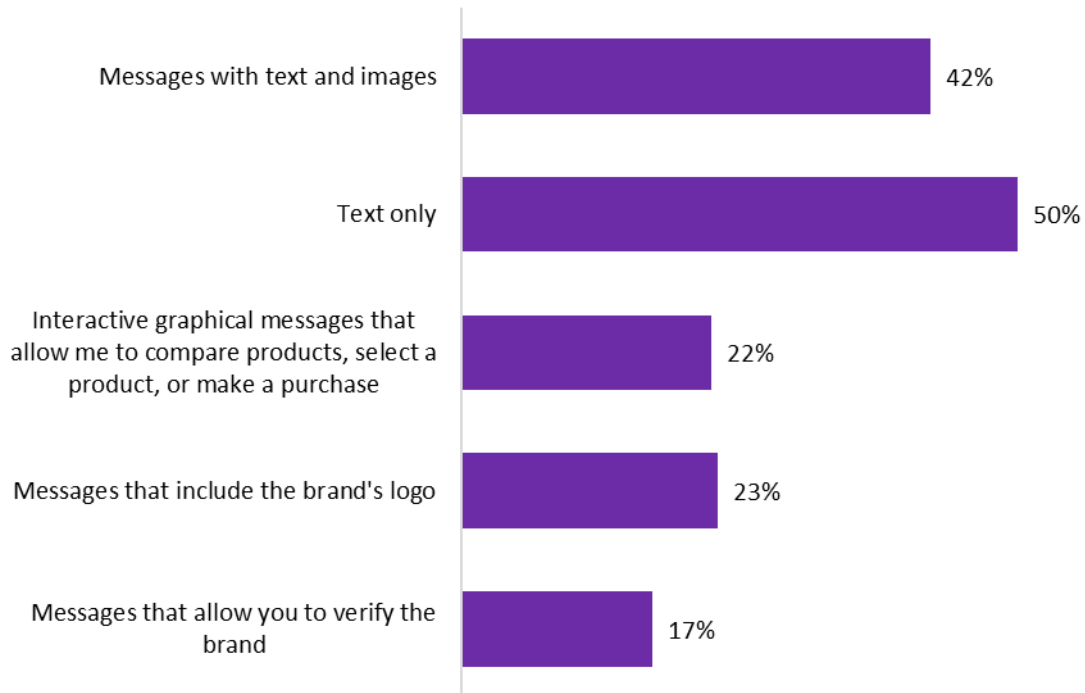
Conversations open a variety of options for enterprises across many verticals. The entire customer care journey, for instance, could take place in an RCS conversation, with AI providing a more genuine and humanized experience by enabling the chatbot to understand conversational language and reply in kind. Retailers can create interactive product catalogs directly within a chat and send personalized recommendations within retargeting messages. In finance, RCS allows banks to send personalized fraud alerts and enables consumers to act on the alert within their RCS-based messaging app or call the bank with the tap of a button rather than searching for the number. RCS can be used within healthcare to combine appointment scheduling with personalized healthcare advice, telehealth services, and medication reminders.

Conversational customer experience platform Infobip has helped businesses deliver successful RCS campaigns, and they have reported real increases in outcomes. Covéa Group moved from using SMS and email to drive traffic to their website to using a conversational approach with RCS to generate leads for an agent callback. 11% of RCS message recipients asked for a callback, and just one person asked to unsubscribe. The same campaign delivered via email resulted in a 0.05% conversation rate.

A Deutsche Telekom RCS campaign raising awareness about a Spotify Premium offer performed twice as well as the SMS campaign run at the same time. Meanwhile, Club Comex saw a ten-fold increase in click-through rates and a 115% increase in revenue by switching from SMS to media-rich RCS messages.

Some enterprises might hold back from using RCS out of fear that consumers do not want to receive RCS Business Messages, but Omdia's *Digital Consumer Insights 2024* survey (see **Figure 11**) shows that even though most consumers have limited exposure to media-rich business messaging, nearly a quarter of global consumers are interested in messages that allow them to perform the research stage of the customer journey. Nearly half are interested in messages that combine text and images. Omdia expects consumers to prefer more interactive messages as they become exposed to them.

Figure 11: What format of marketing/notification messages from businesses do you most prefer?



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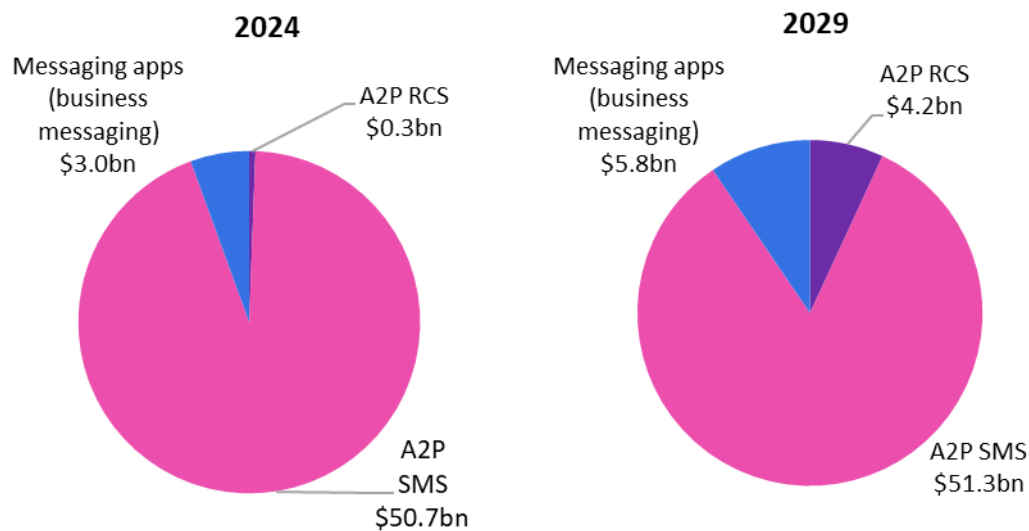
Notes: Survey conducted in Australia, Brazil, Canada, China, Egypt, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Saudi Arabia, South Africa, South Korea, Spain, Turkey, United Kingdom, and United States. Total respondents: 16,277

Source: Omdia

For telcos: Mitigate against A2P SMS revenue loss to messaging apps

A2P SMS revenue will decline, and while telcos in some countries might be able to fight the decline for longer than others, there is no doubt that A2P SMS cannot last forever. Indeed, Omdia is forecasting A2P SMS revenue to begin declining globally starting in 2028. Telcos no longer hold the monopoly on business messaging, and messaging apps can provide a richer, more interactive, and more engaging business messaging experience.

Figure 12: Global business messaging revenue by messaging platform, 2023 vs. 2029



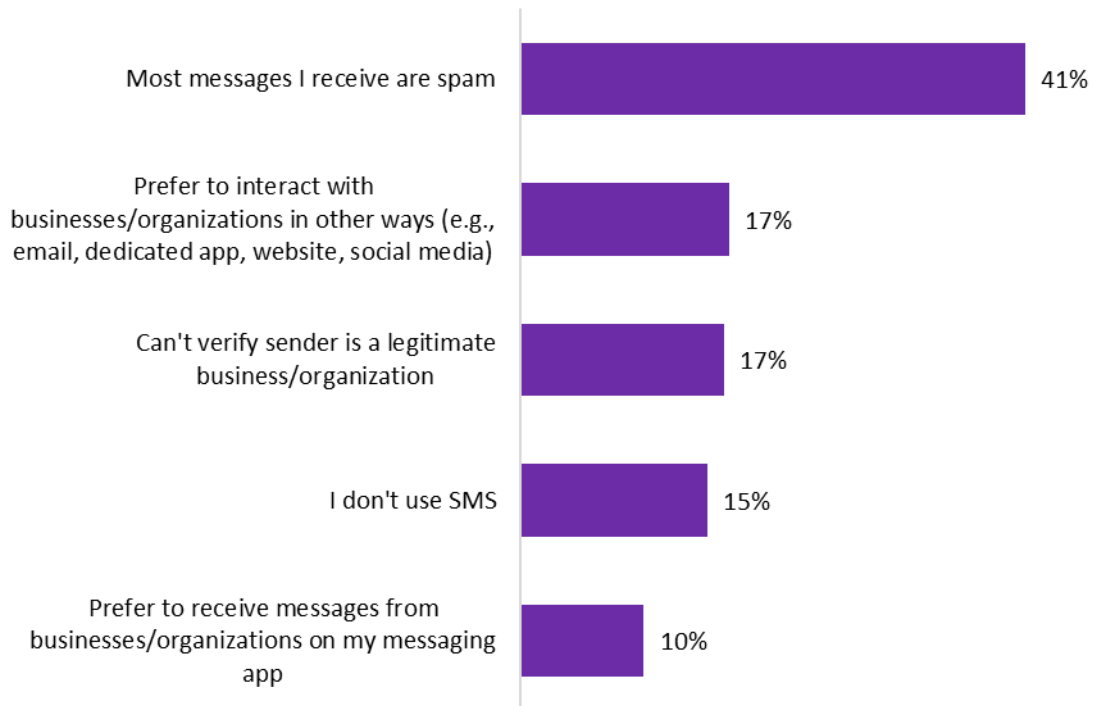
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Source: Omdia

RCS will give telcos the means to fight the competition from messaging apps offering business messaging services. It will take time for telcos to replace falling A2P SMS revenue with revenue from A2P RCS, but without RCS, that revenue will eventually all disappear to the messaging apps. **Figure 12** shows A2P RCS revenue growing from just 1% of total global business messaging revenue in 2024 to 7% by 2029, while messaging apps grow their market share from 6% to 10% in the same timeframe. One barrier to A2P RCS growth is telco caution, which slows down the onboarding of enterprises.

In addition to fighting to make sure they keep market share in the business messaging market, telcos must also face the reality of consumers not wanting to open SMS messages from unrecognized numbers. A2P SMS revenue has been affected by years of consumers receiving unsolicited and unwanted messages from unverified senders; responding to SMS from unverified senders is riddled with dangers.

Figure 13: Why don't you open messages from businesses/organizations on your mobile phone?



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Note: Survey conducted in Australia, Brazil, Canada, China, Egypt, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Saudi Arabia, South Africa, South Korea, Spain, Turkey, United Kingdom, United States. Total respondents: 3,750

Source: Omdia

Data from Omdia's *Digital Consumer Insights 2024* backs this up, with 41% of respondents telling us that they do not open messages from businesses because most of them are spam (see **Figure 13**). 17% said they do not open messages because they cannot verify that the sender is legitimate.

With verified sender on RCS, telcos can begin to gain consumers' trust once more, meaning consumers are more likely to open messages. In addition, because RCS has read receipts, enterprises can see exactly how effective their campaigns are.

Conclusions

Recommendations for enterprises

- Enterprises should explore RCS to enable communications throughout the customer journey.
 - Rich media keeps consumers engaged, and increasing messaging interactivity means that the customer can do more within an RBM conversation, whether it's making a purchase, troubleshooting a problem, or responding to a notification.
 - RCS is proven to increase the effectiveness of campaigns. Using RCS alone or as part of an omnichannel solution is a clear win once iOS devices can also receive RCS messages.
- Explore GenAI to make RCS experiences more personalized.
 - Personalization is the key to making campaigns more engaging to consumers—more engagement will lead to a higher rate of conversion.

Recommendations for telcos

- Telcos must work with the messaging ecosystem to raise RCS awareness among enterprises and consumers.
 - Enterprises need to understand what RCS is to understand how they can use it. They need to understand how it differs from other messaging options and how effective it can be for them.
 - While consumers do not have to understand RCS to receive RCS messages from other consumers, executives are consumers too, so raising RCS awareness among all consumers will help raise awareness among enterprise customers.
- Telcos should use RCS internally for marketing and customer care functions.
 - All the reasons why enterprises should use RCS equally apply to telcos. Plus, when telcos use RCS, it also helps raise awareness of what RCS is and how it can be used among consumers. As per the earlier recommendation, when consumers use RCS, it will help enterprises understand how they can use RCS.

Appendix

Methodology

This whitepaper uses survey data from Omdia's *Digital Consumer Insights 2024* as well as data and insights from Omdia's *RCS Users, Traffic and Revenue Forecast 2024–29*; *Messaging Apps Users, Traffic and Revenue Forecast 2024–29*; *Mobile Messaging Traffic and Revenue Forecast 2024–29* and *Smartphone OS, Active Installed Base – 2Q24*. It also draws on briefings from within telcos and key players in the messaging ecosystem.

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