

The Long-Term RCS Opportunity (2019-2028)

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About Mobilesquared

Leading analysts in Business Messaging

We provide definitive data and expert insight

We work with the leading mobile and tech companies across the mobile ecosystem, from regulators, mobile operators, service providers, brands, agencies, start-ups ... to understand mobile and engagement. We do this through extensive research, deep analysis based on years of experience, and forecasting market opportunities based on actionable numbers.

Accurate data. No hype.



Mobilesquared updates its business messaging forecasts on a bi-annual basis. These are based on on-going research, discussions and interviews with the SMS / RCS / WhatsApp / Apple ecosystem. This presentation contains our latest forecasts, published between November 2019 – May 2020.

- **Global A2P SMS Business Messaging Databook, Nov 2019**
 - **Global RCS Business Messaging Databook, Feb 2020**
 - **WhatsApp Business Messaging Databook, Apr 2020**
- **Long-Term Global RCS Forecasts Databook, 2018-2028, May 2020**
 - **What If Apple Did RCS Report, May 2020**

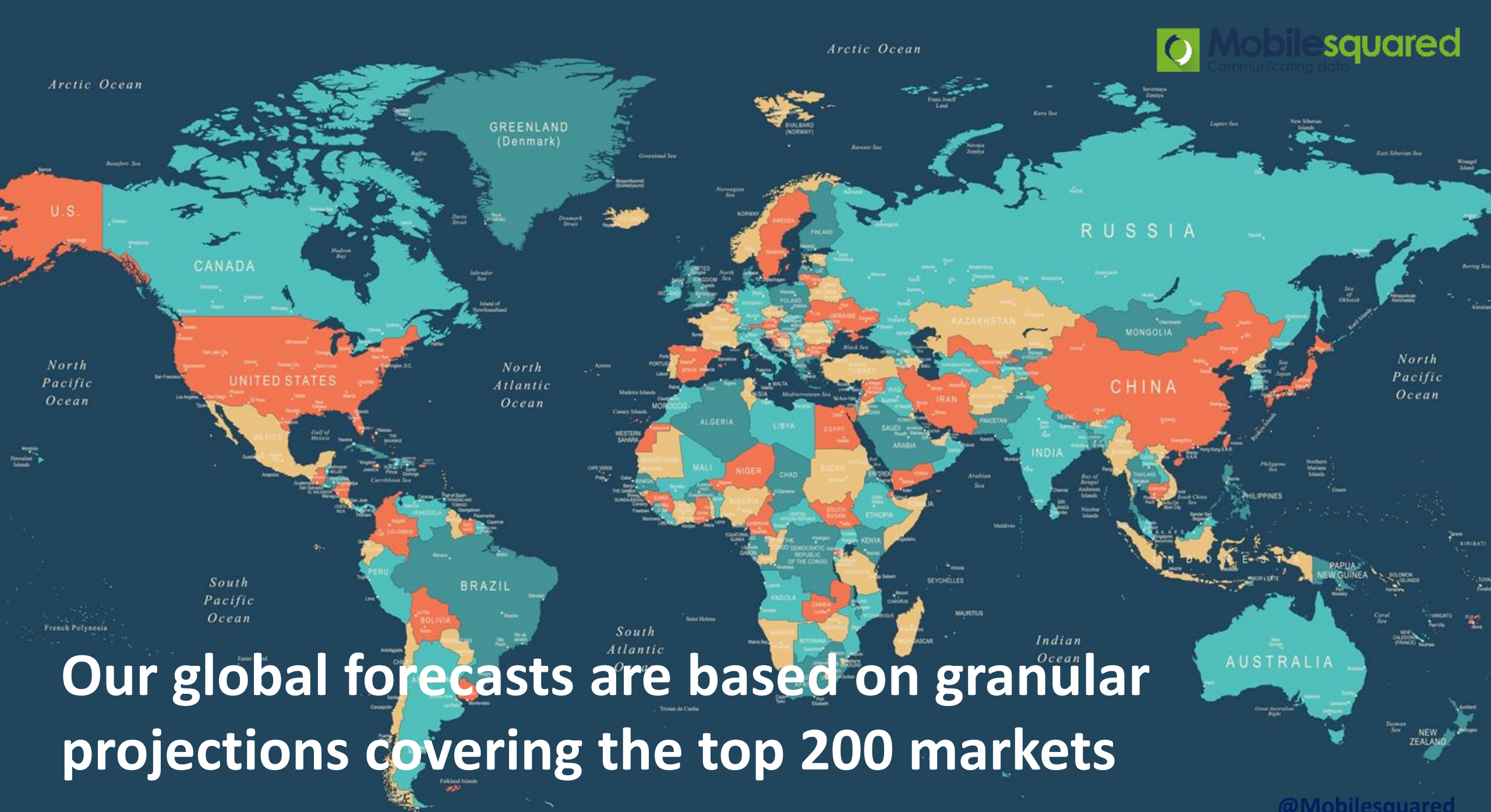
Our next updates will be based on COVID-19 impact published from June 2020.



COVID-19 RESEARCH

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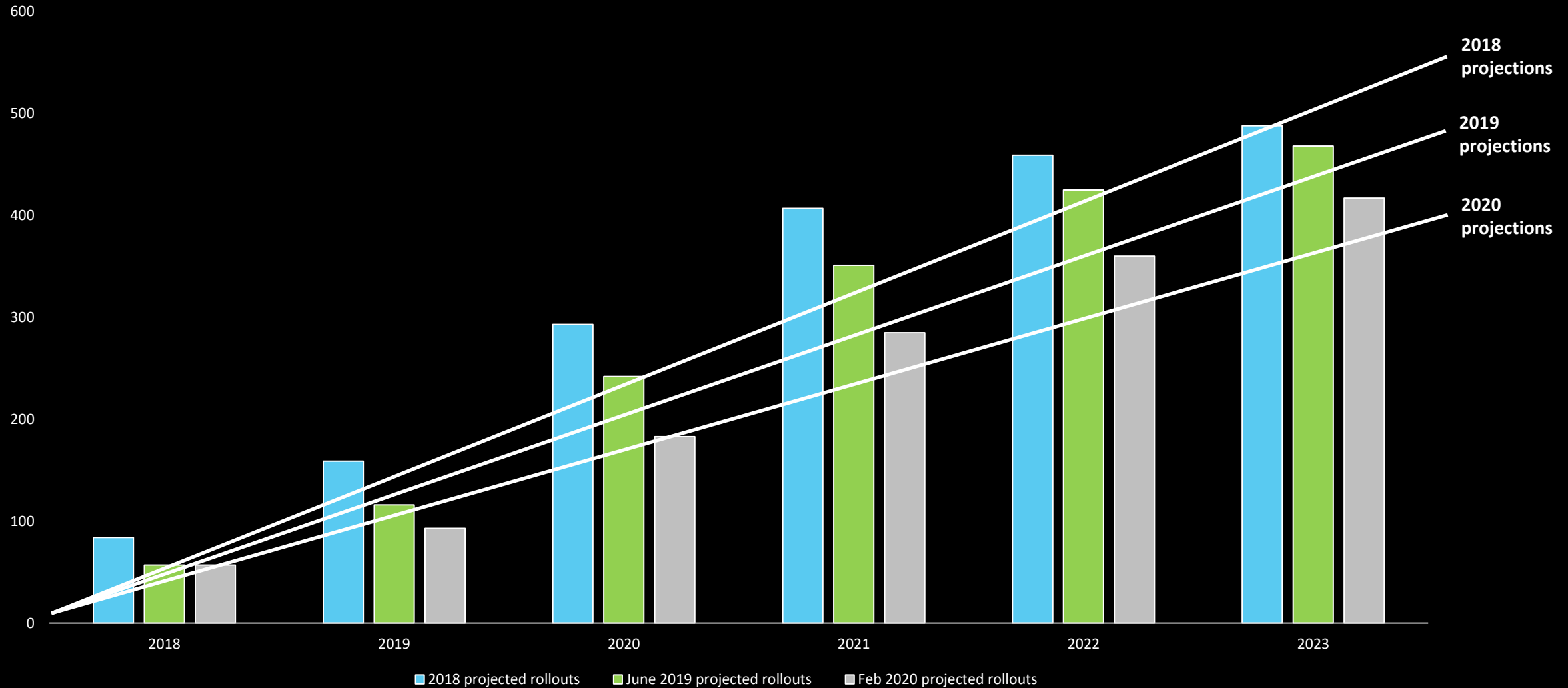
Our global forecasts are based on granular projections covering the top 200 markets

LONG-TERM FORECASTS



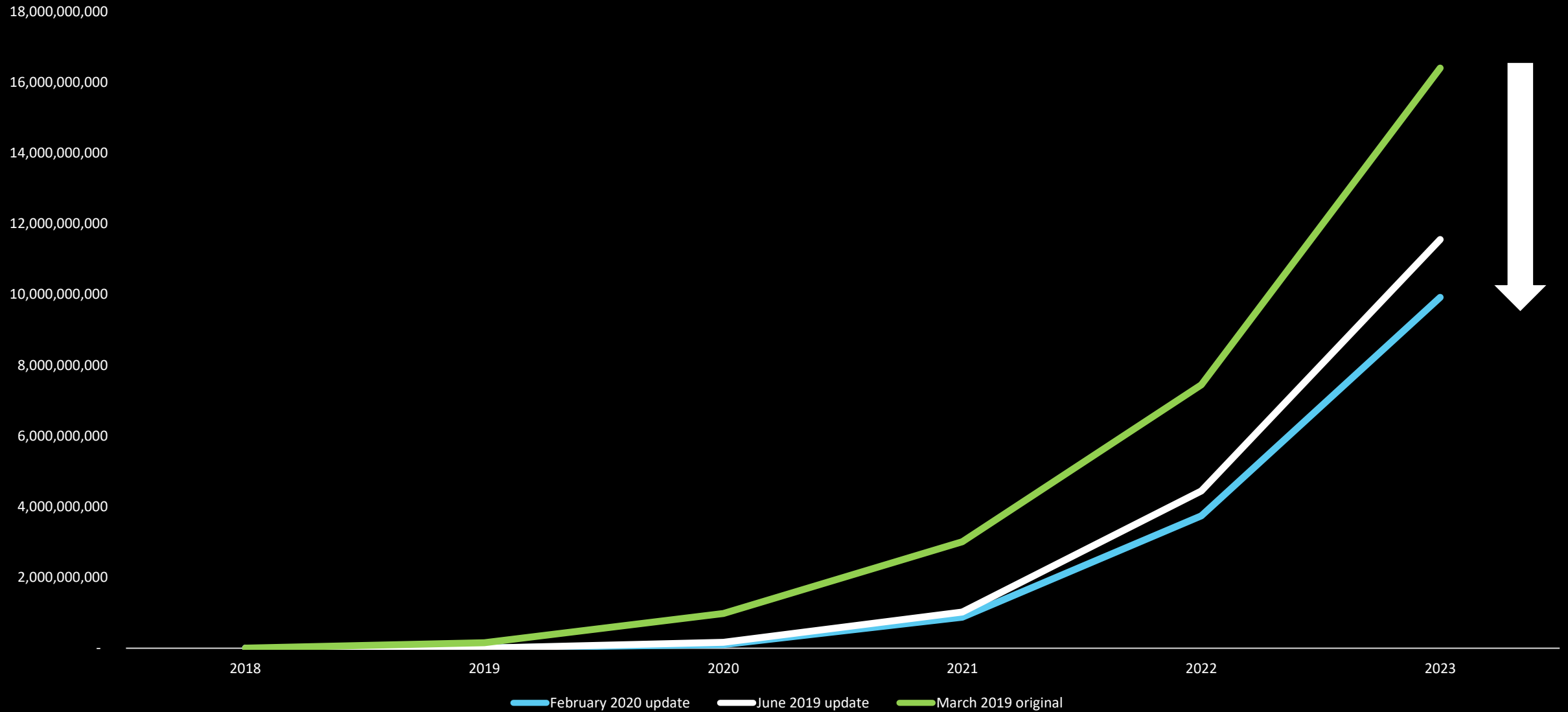
Why the need for 10-year forecasts

RCS MNO launches, by year



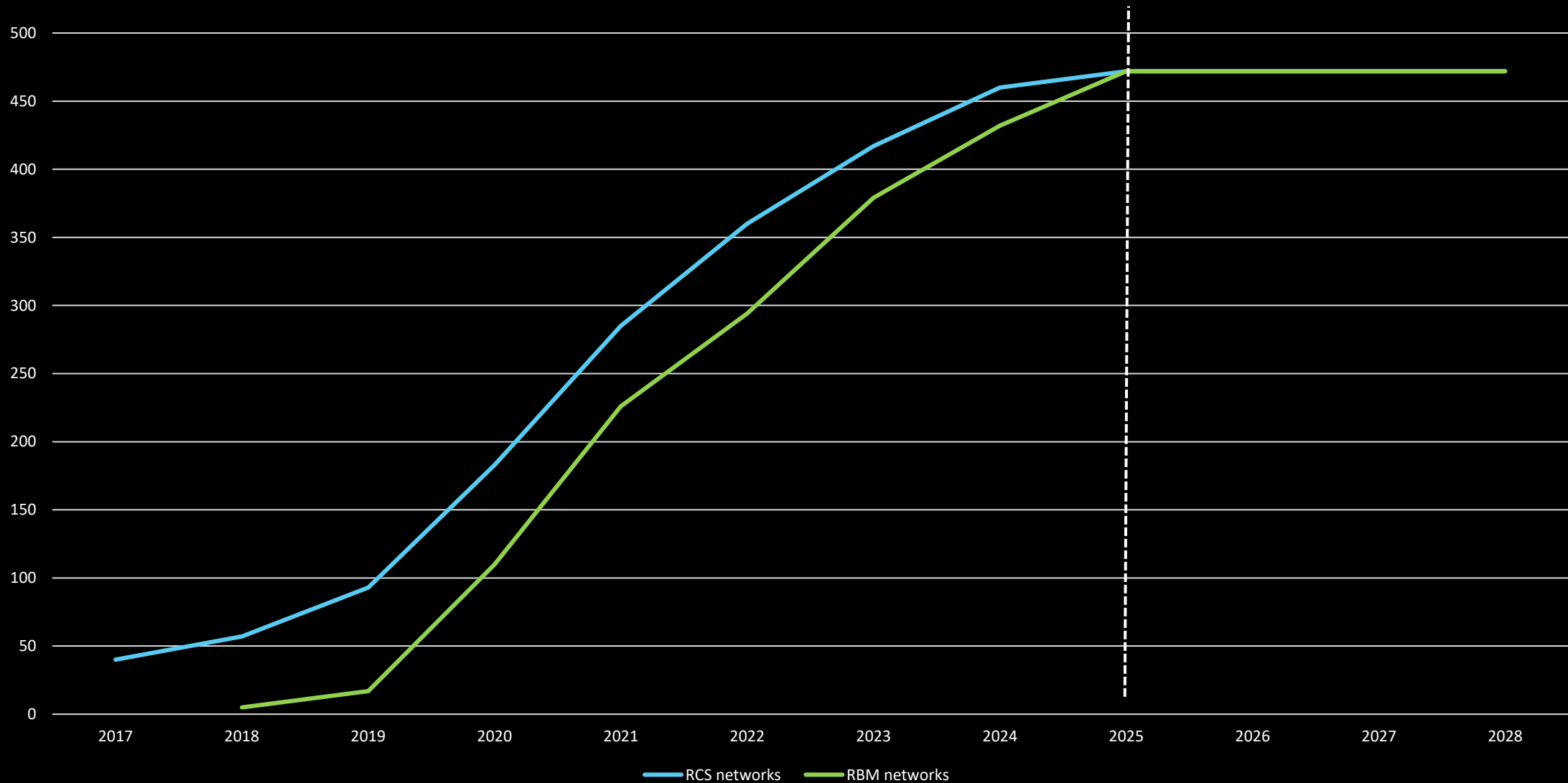
Why the need for 10-year forecasts

RBM spend declining before its even started (\$)



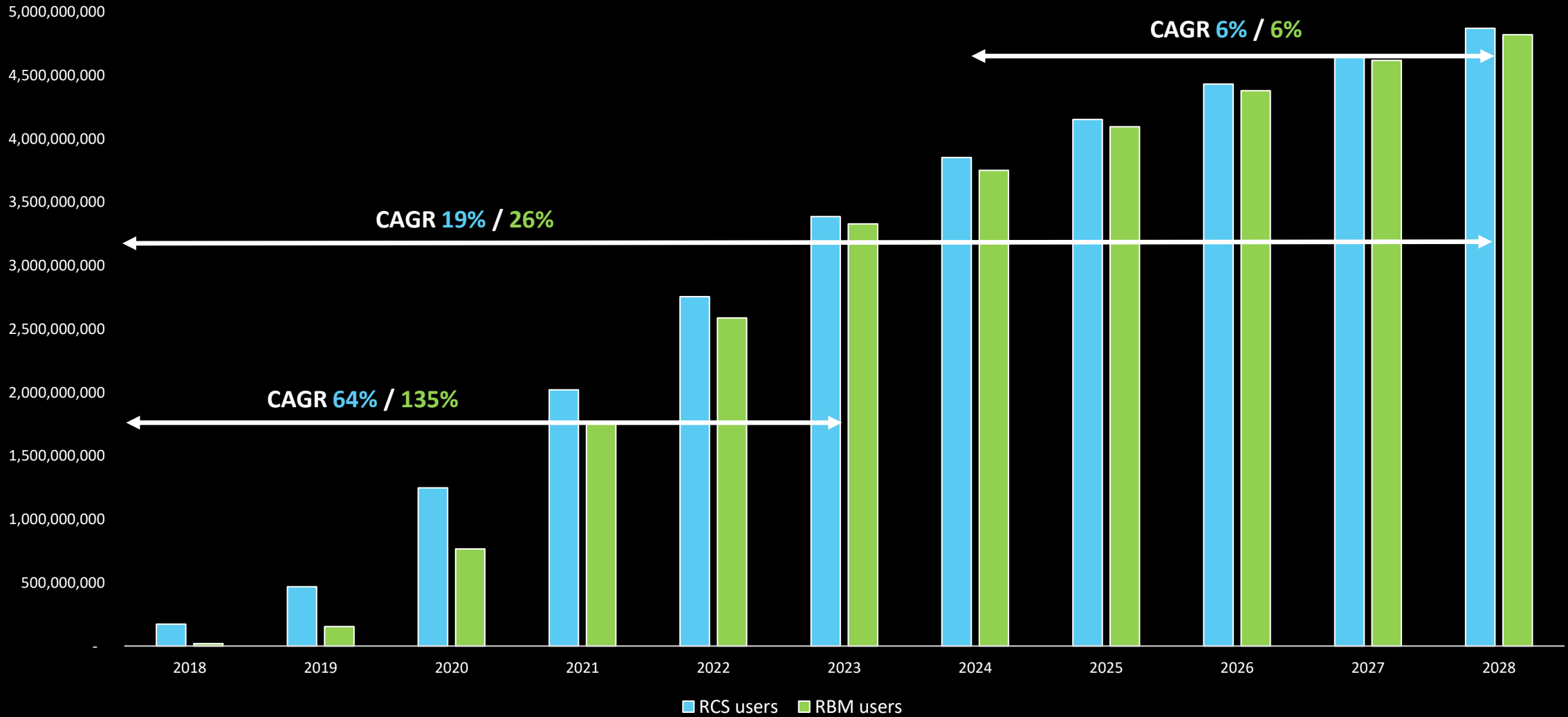
Global RCS / RBM deployments, 2017-2028

Ceiling reached 2025



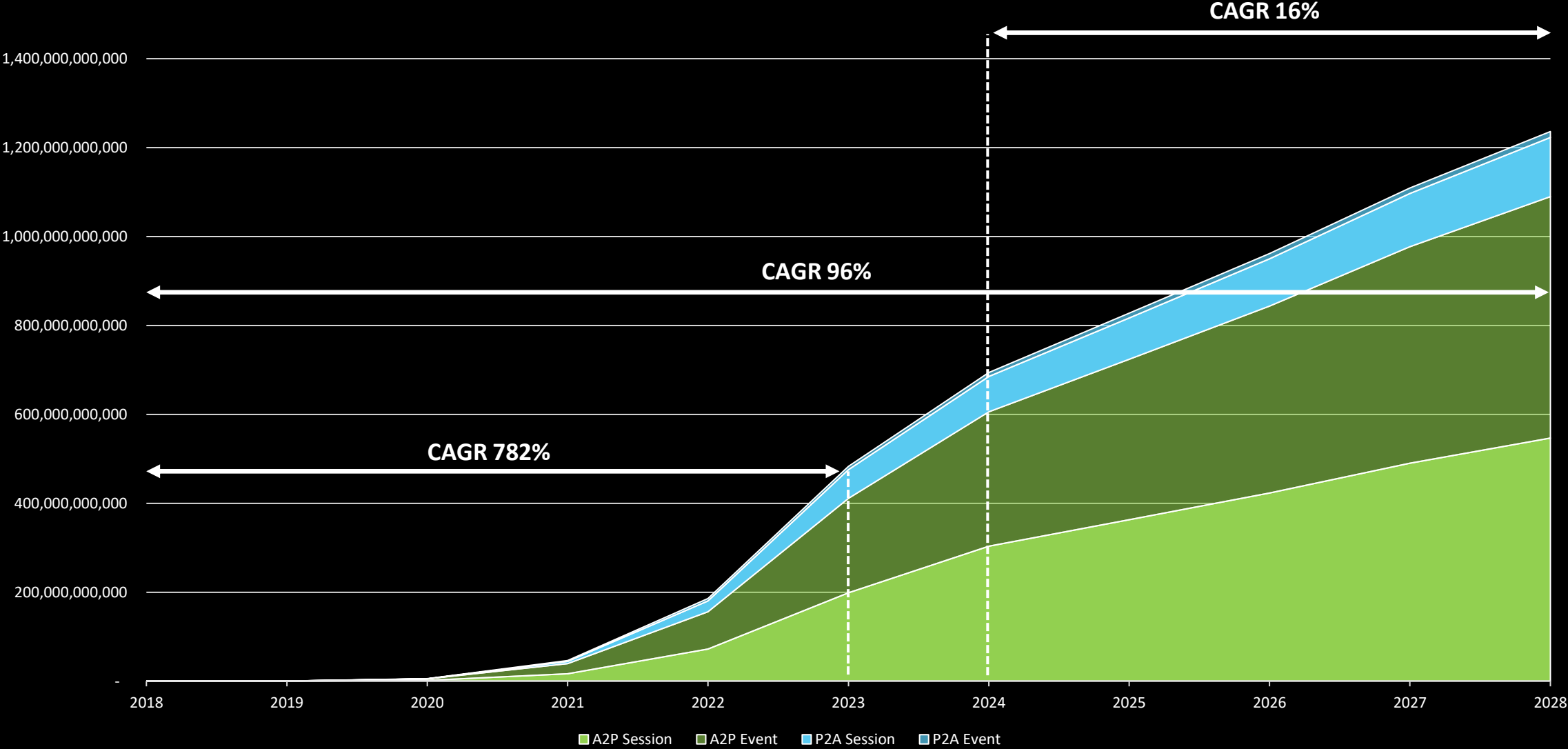
Global RCS / RBM users, 10-year forecasts

Short-term / full-term / long-term outlook



Global RBM total traffic, 2018-2028

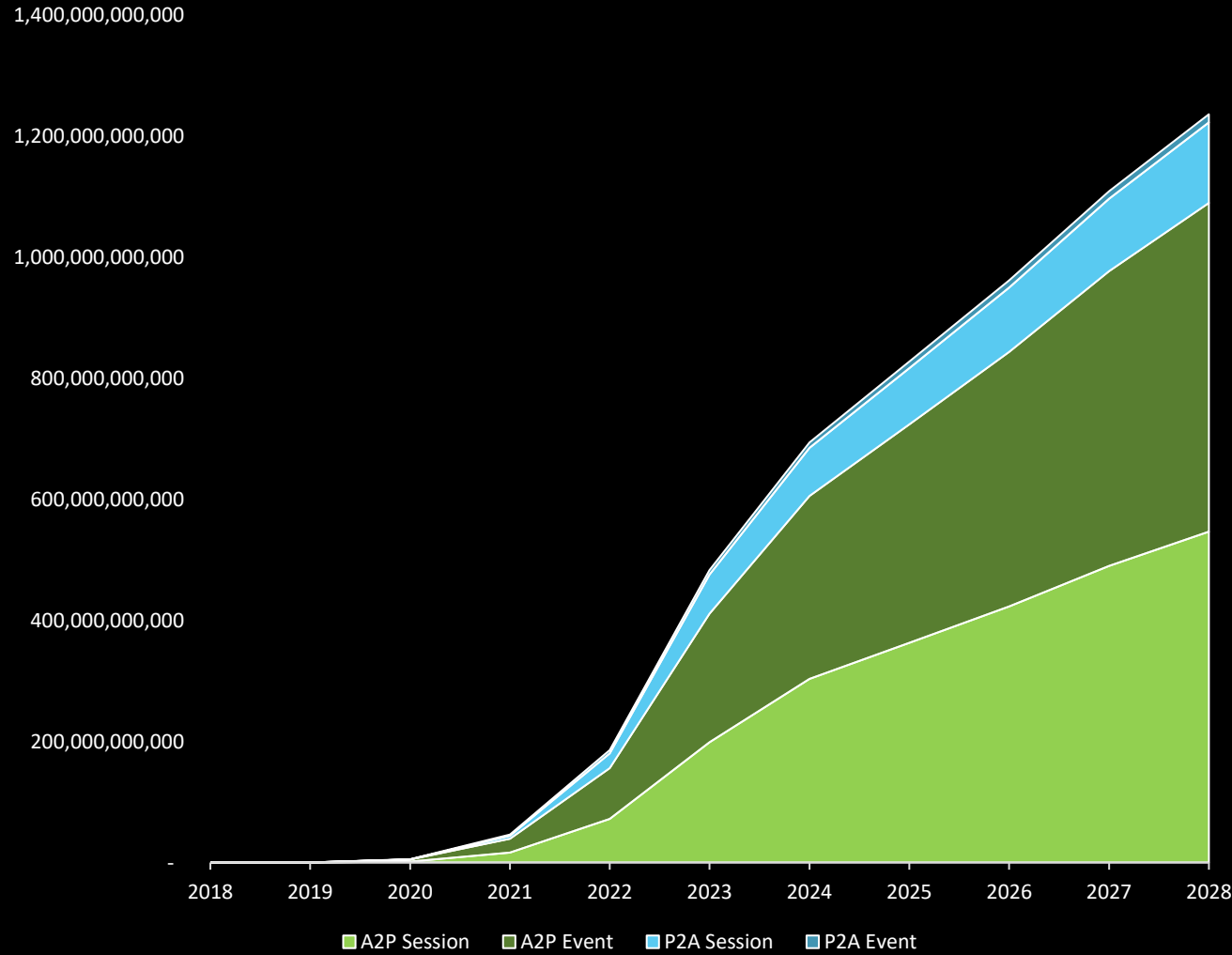
Short-term / full-term / long-term outlook



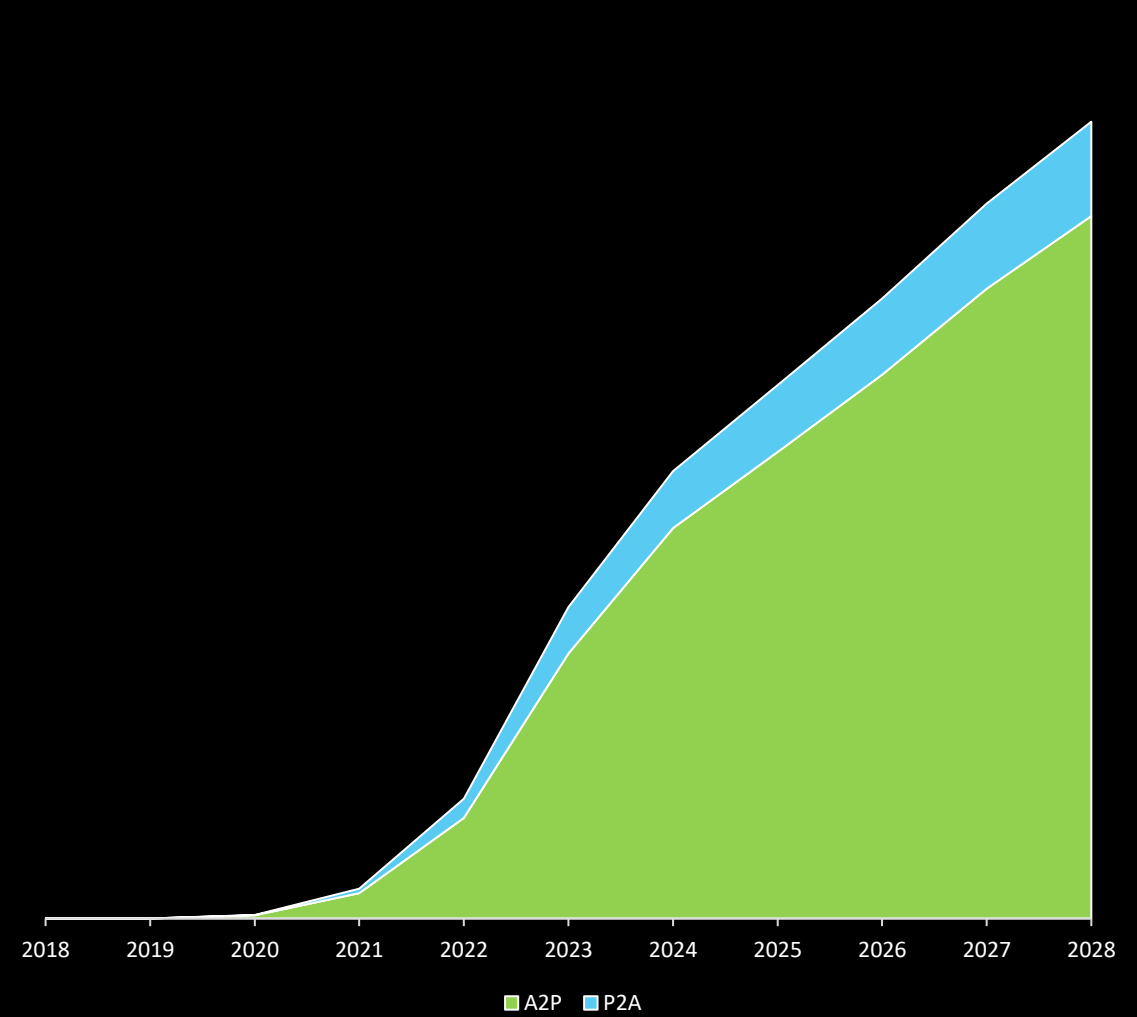
Global RBM traffic, 2018-2028

By type / initiation

RBM event / session

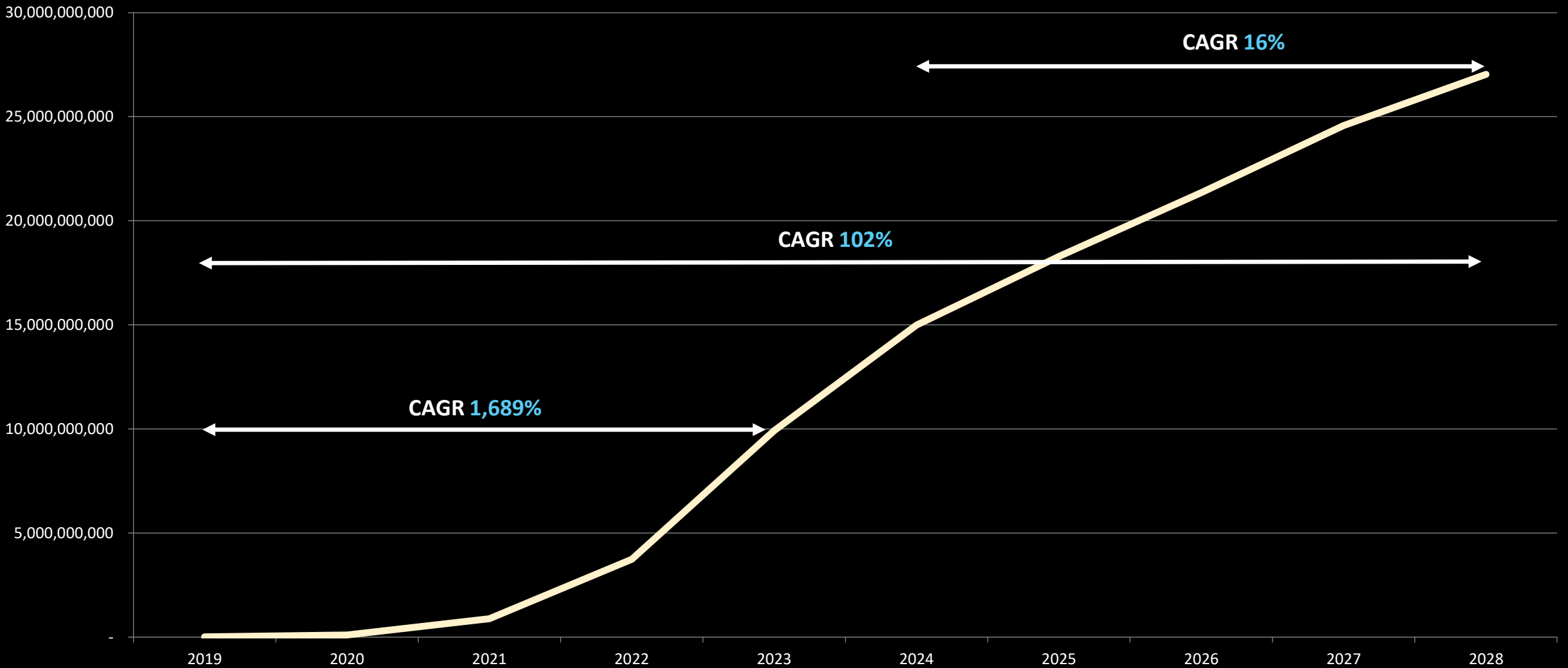


RBM A2P / P2A

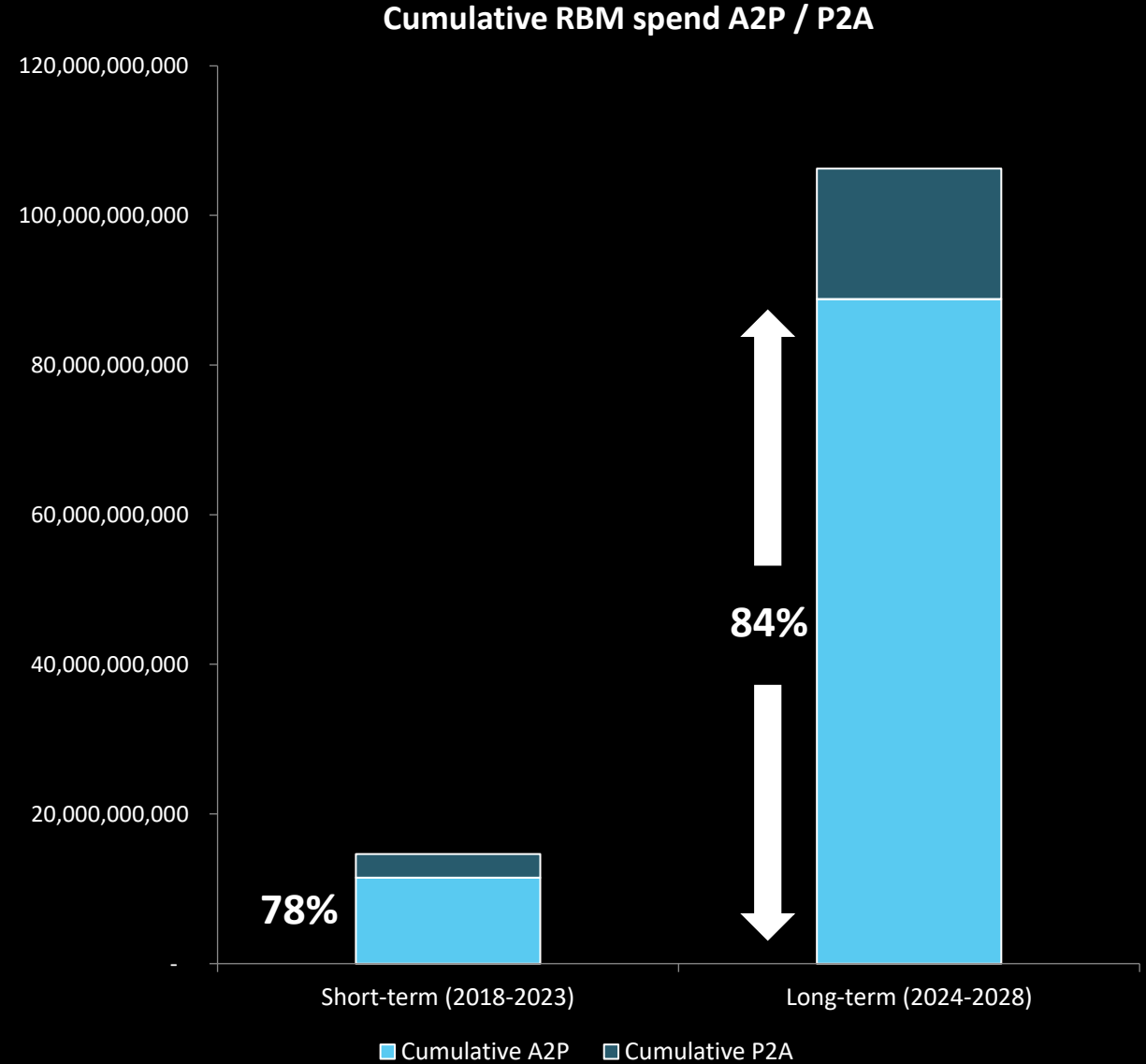
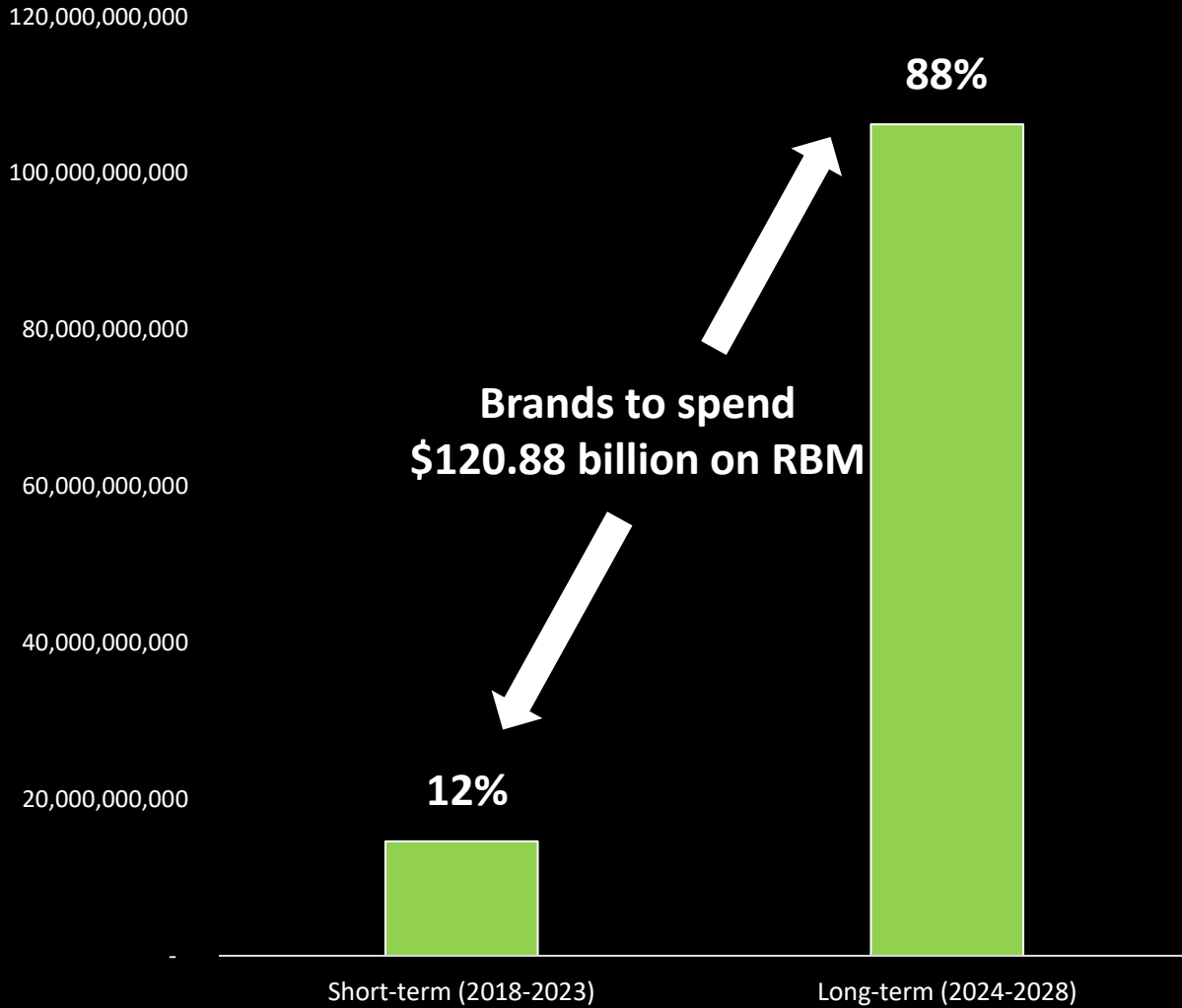


Global RBM spend, 10-year forecasts

(\$)



Cumulative RBM spend, short term vs long term (\$)



RBM SPEND

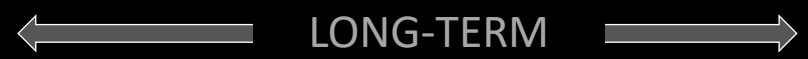
\$14.64 BILLION



\$120.88 BILLION



\$106.24 BILLION



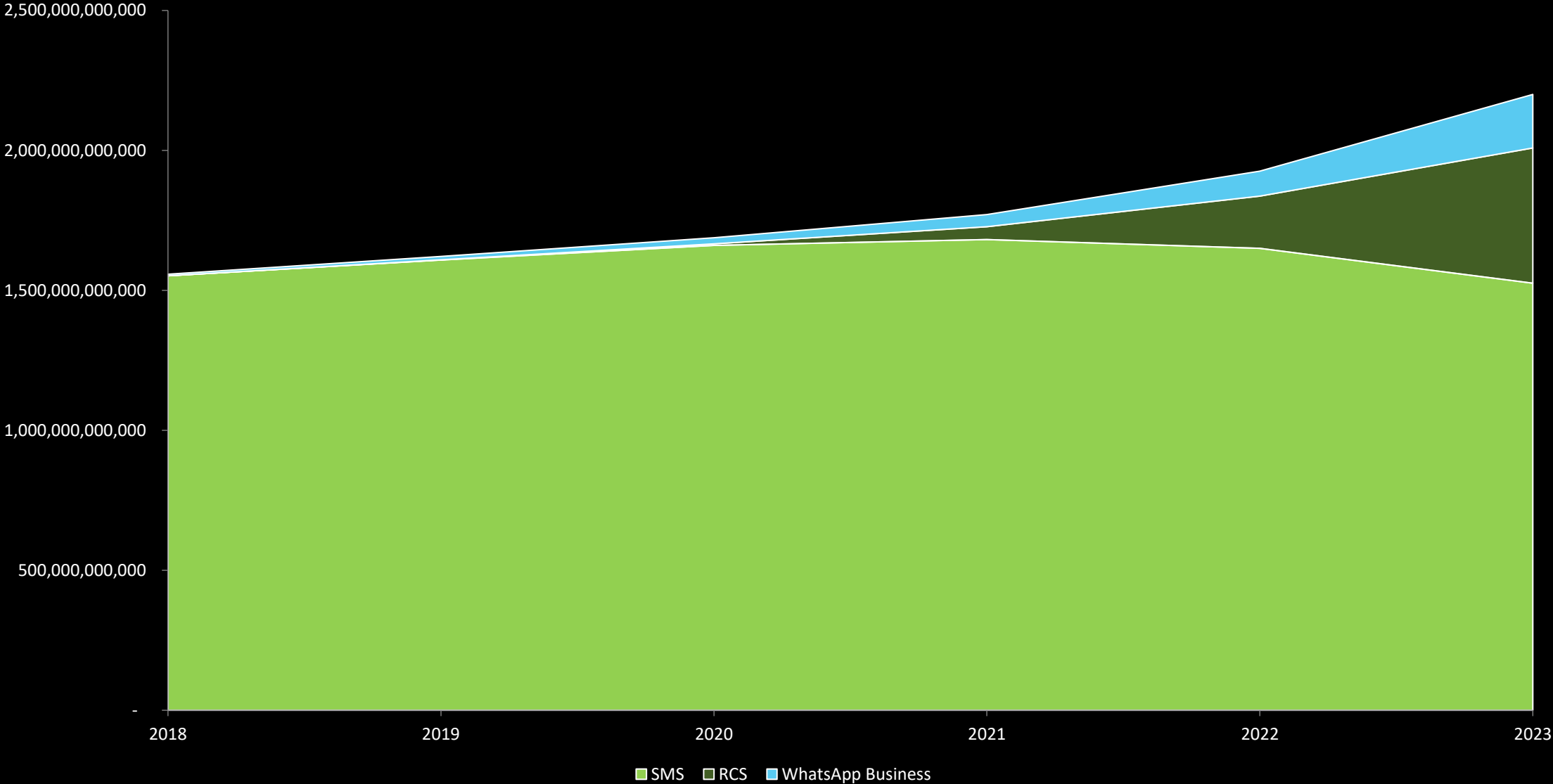
2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028

SHORT-TERM FORECASTS



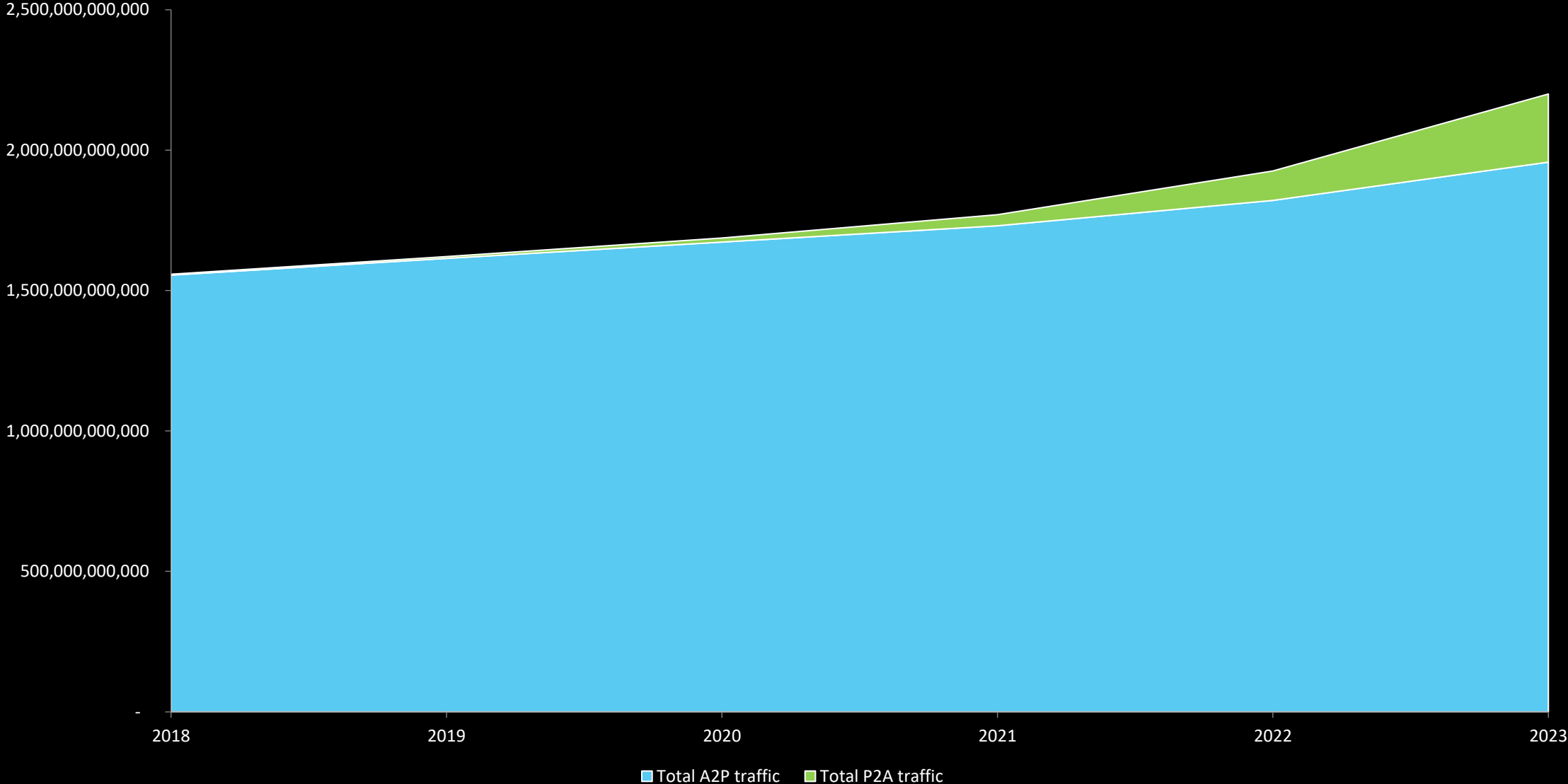
Global business messaging traffic, 2018-2023

A2P SMS / RBM / WhatsApp Business



Global business messaging traffic, 2018-2023

A2P SMS / RBM / WhatsApp Business

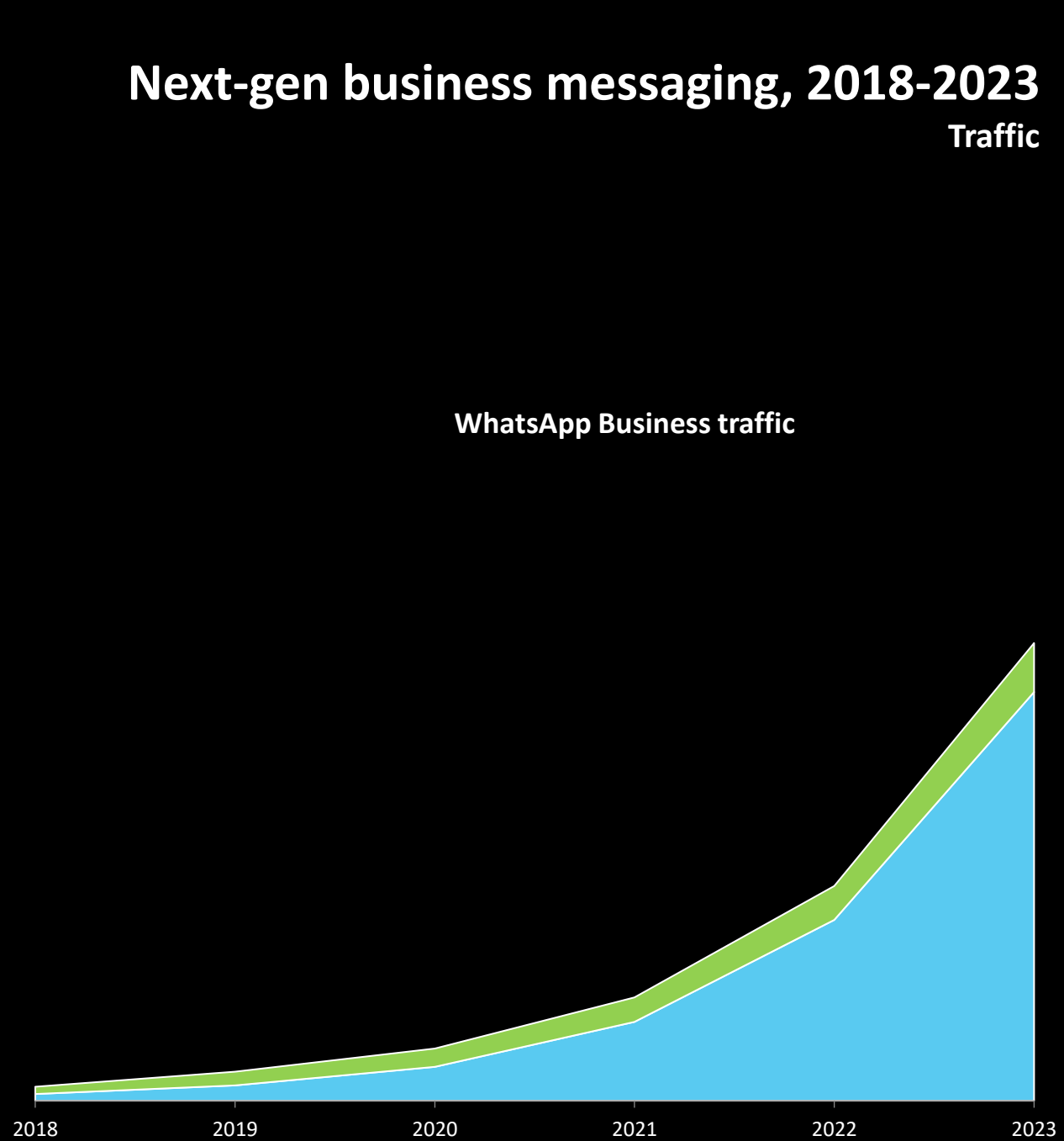
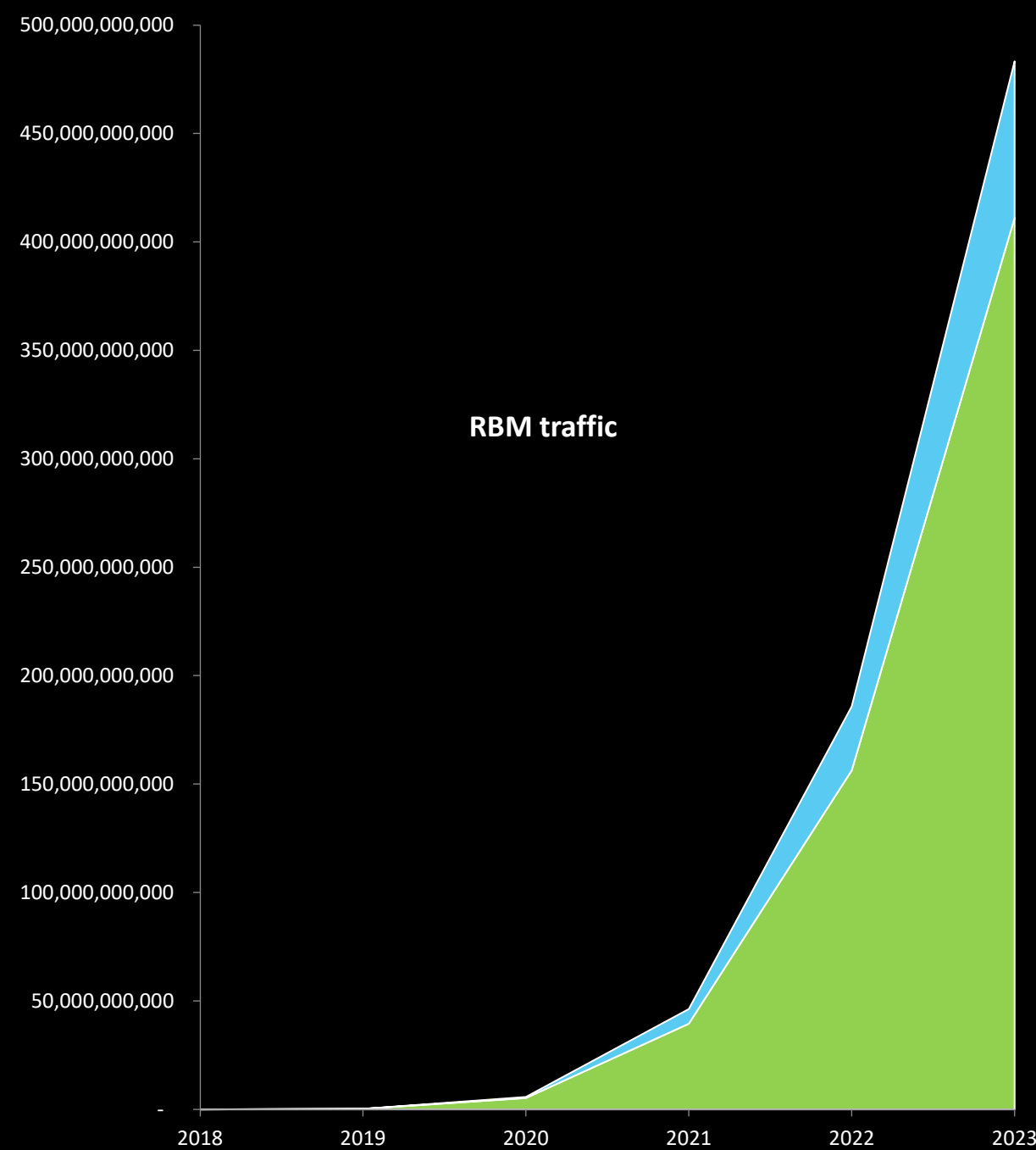


Next-gen business messaging, 2018-2023

Traffic

RBM traffic

WhatsApp Business traffic



A2P

P2A

SMS

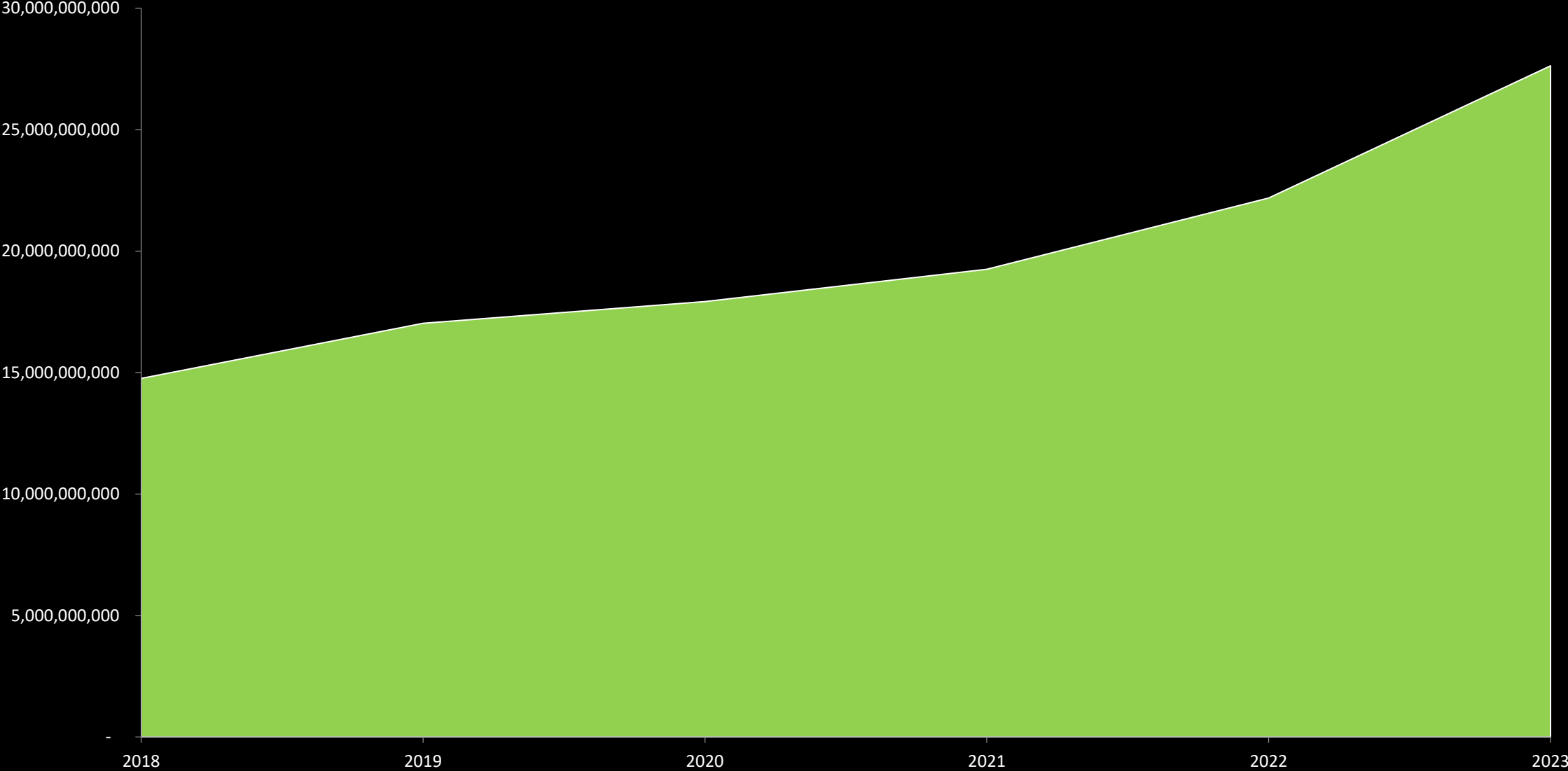
RBM

WhatsApp

ABC

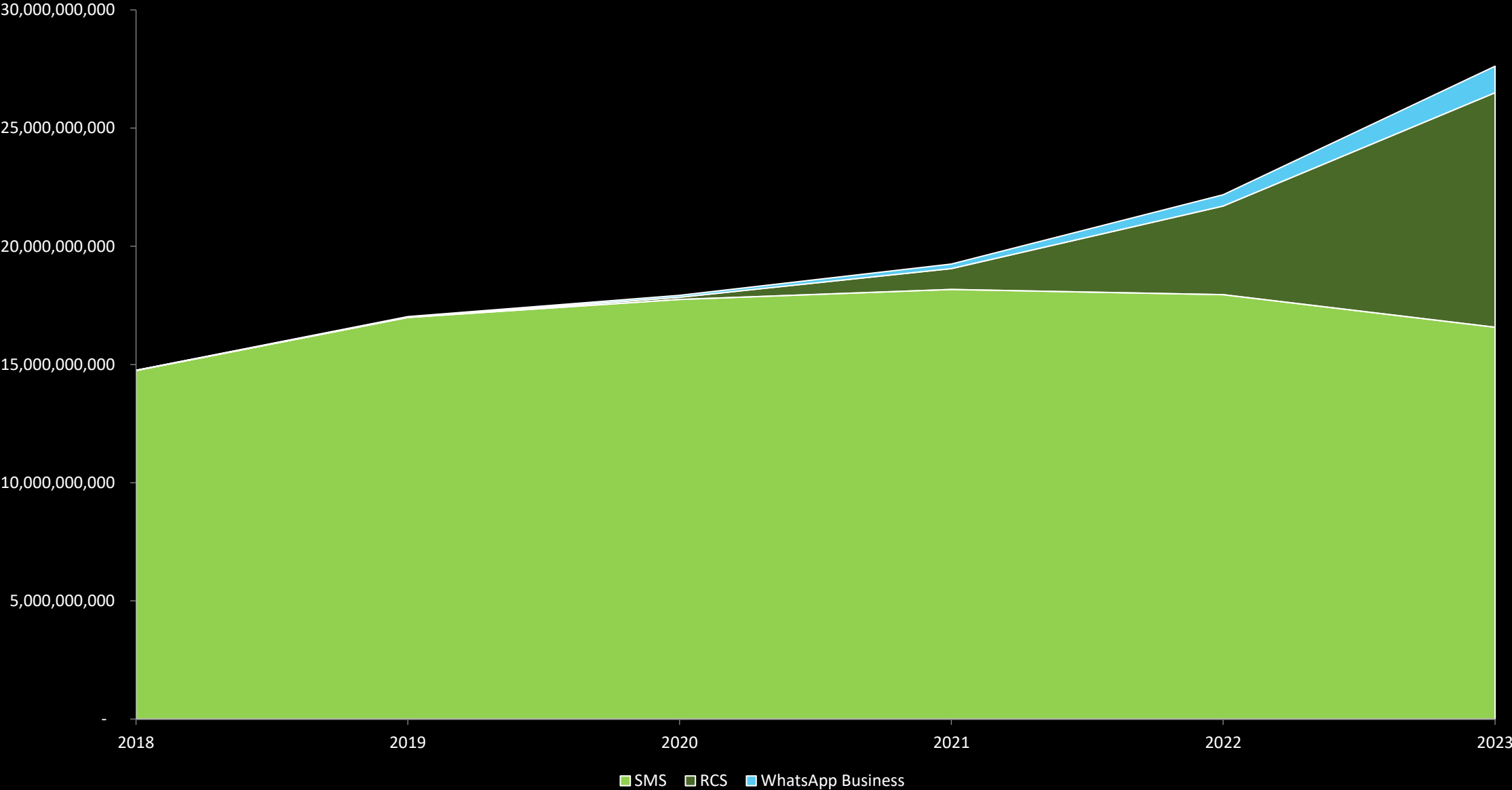
Total global business messaging spend 2018-2023

(\$)



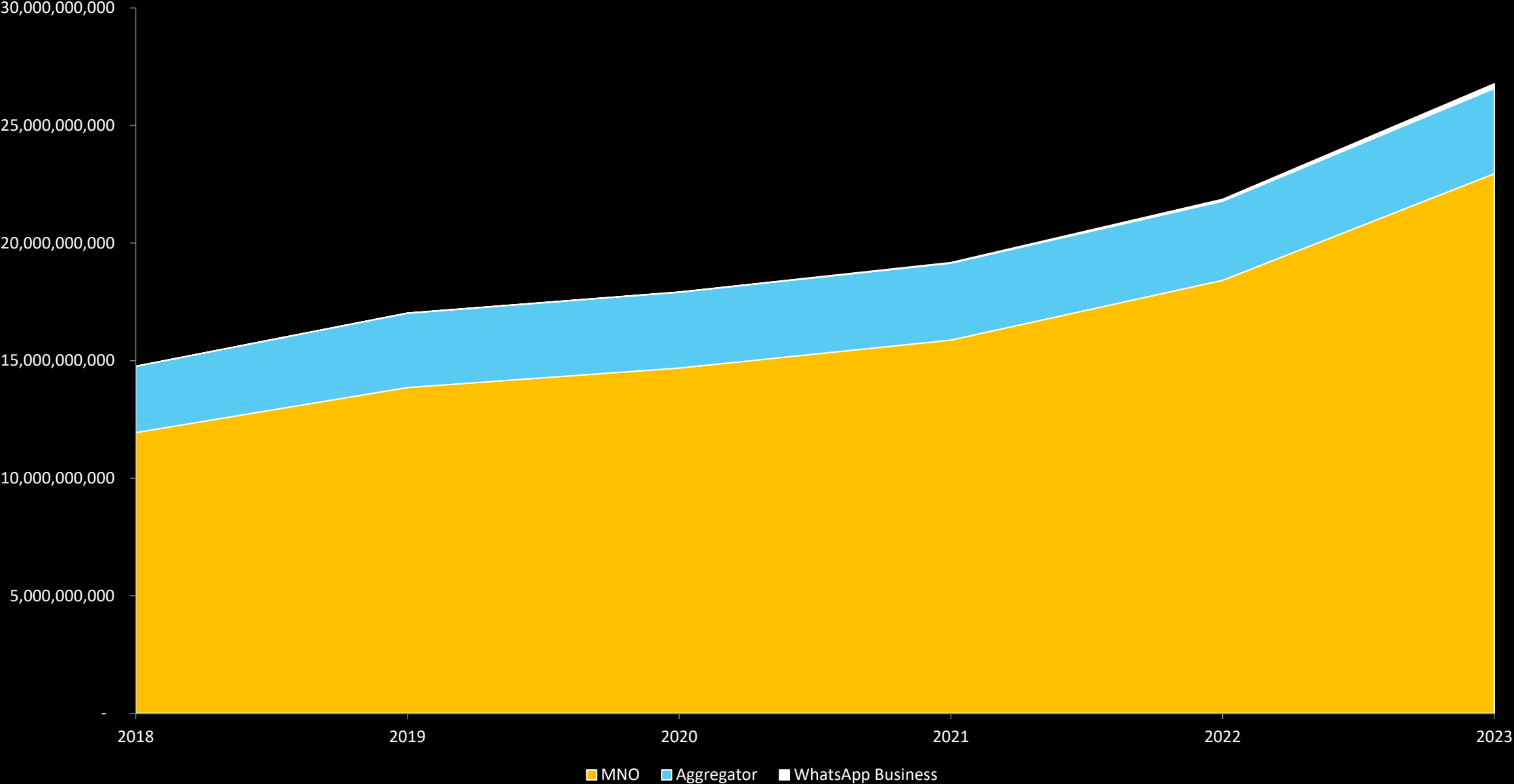
Global RBM spend 2018-2023

(\$)



Global business messaging value chain

A2P SMS / RBM / WhatsApp Business

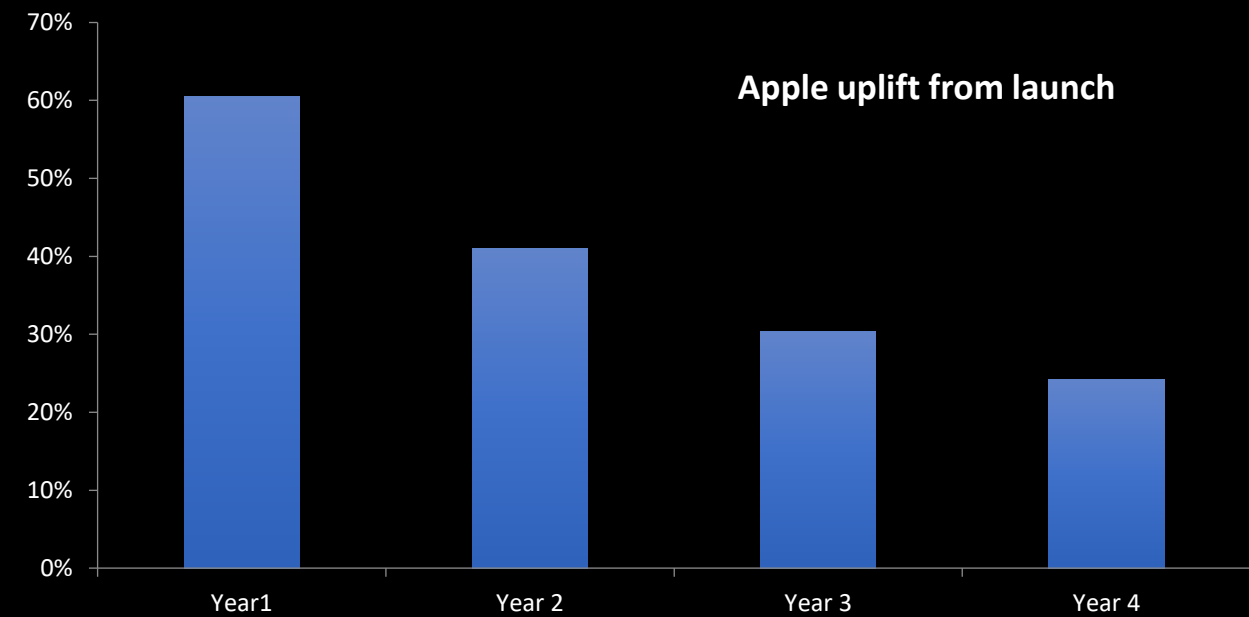
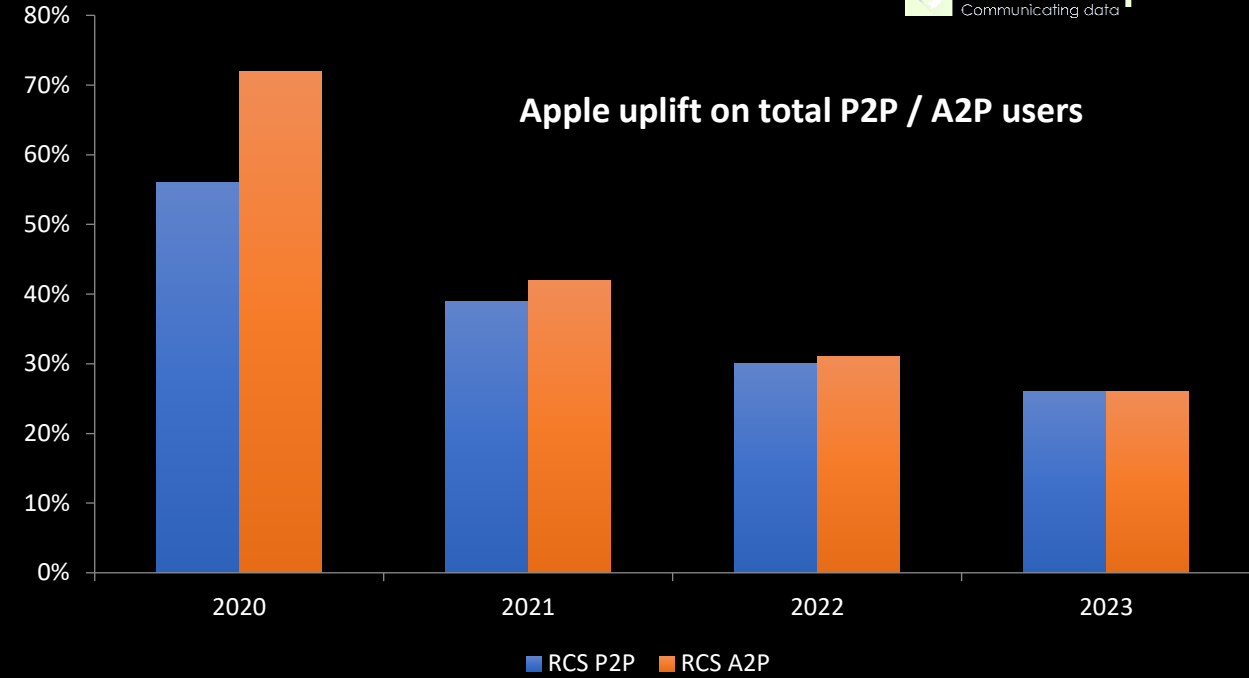
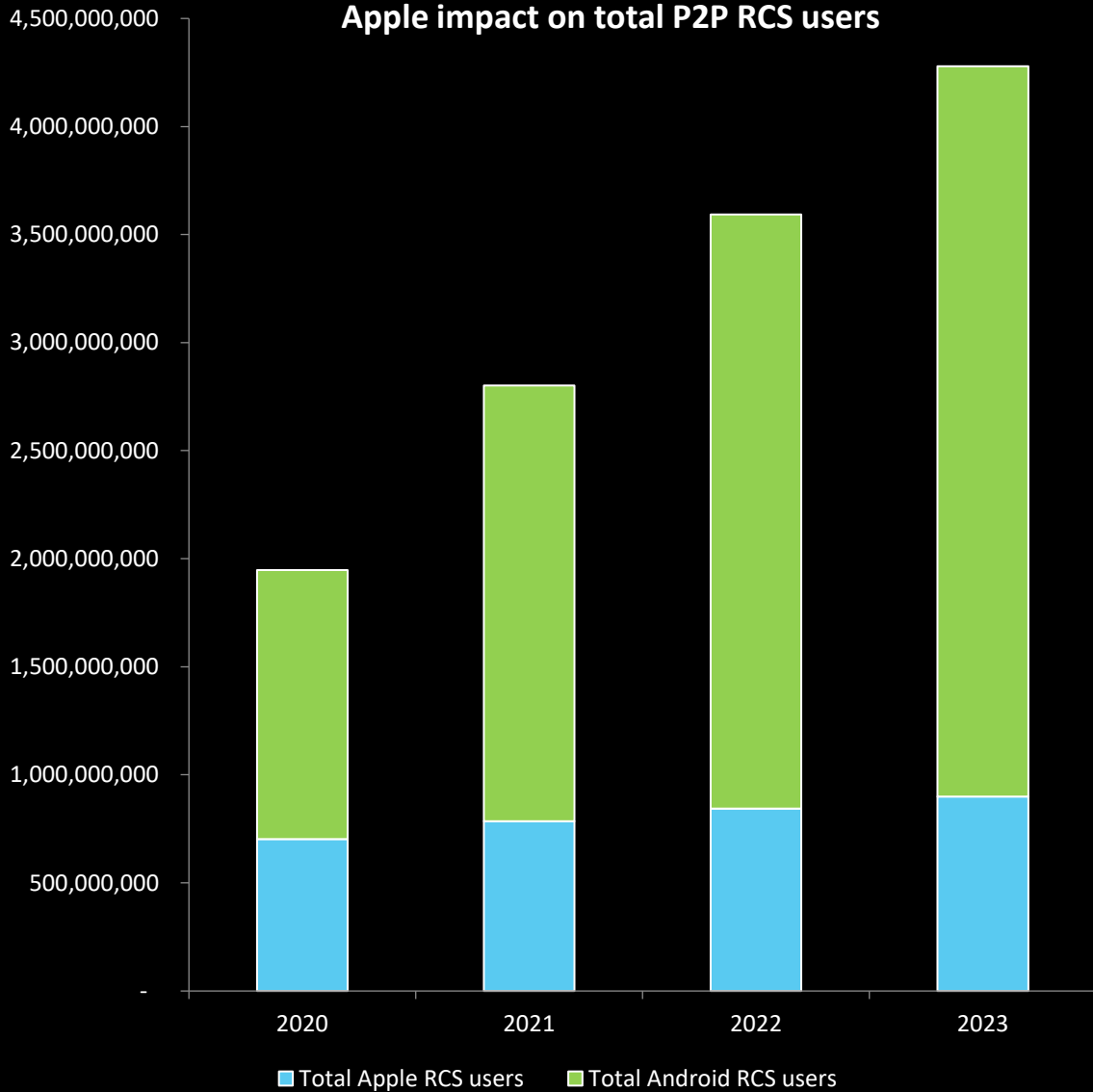


SHORT-TERM FORECASTS: WHAT IF APPLE DID RCS?



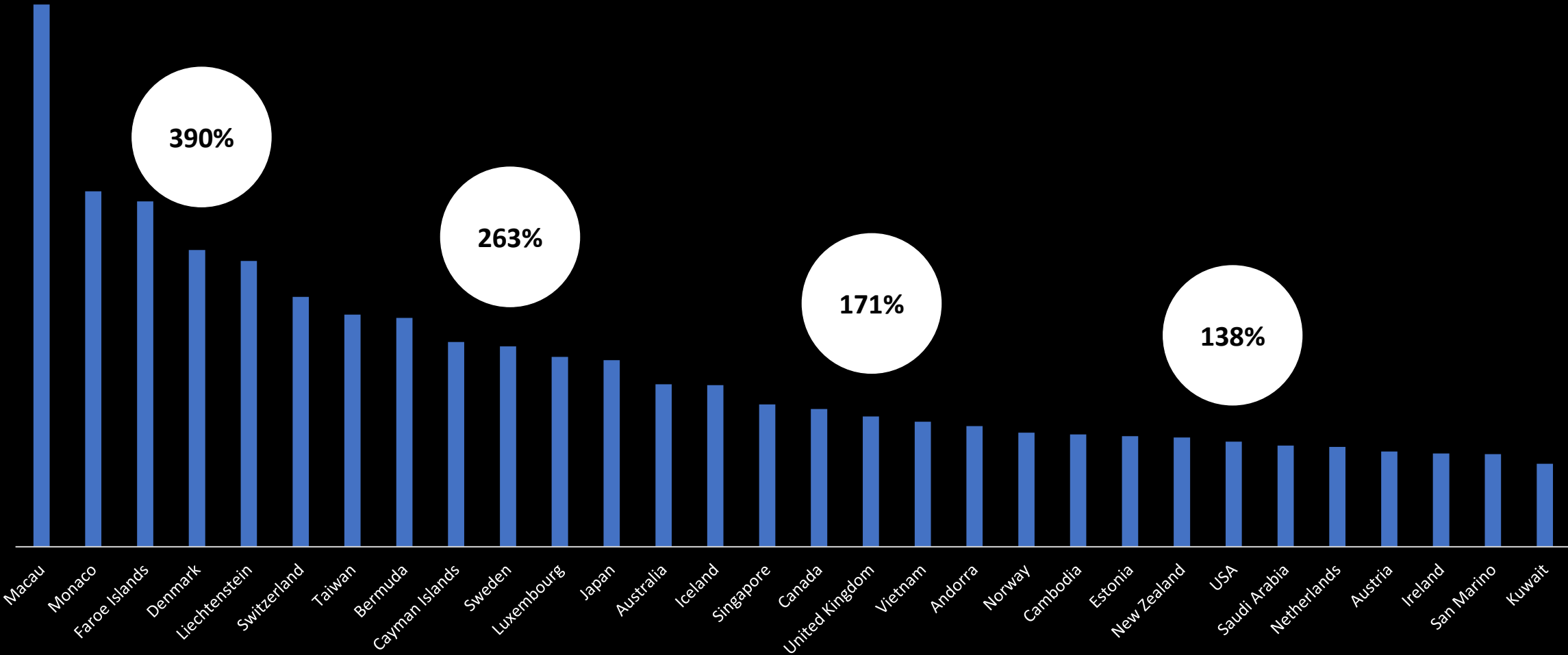
Apple's immediate impact

Short-term impact on RCS users



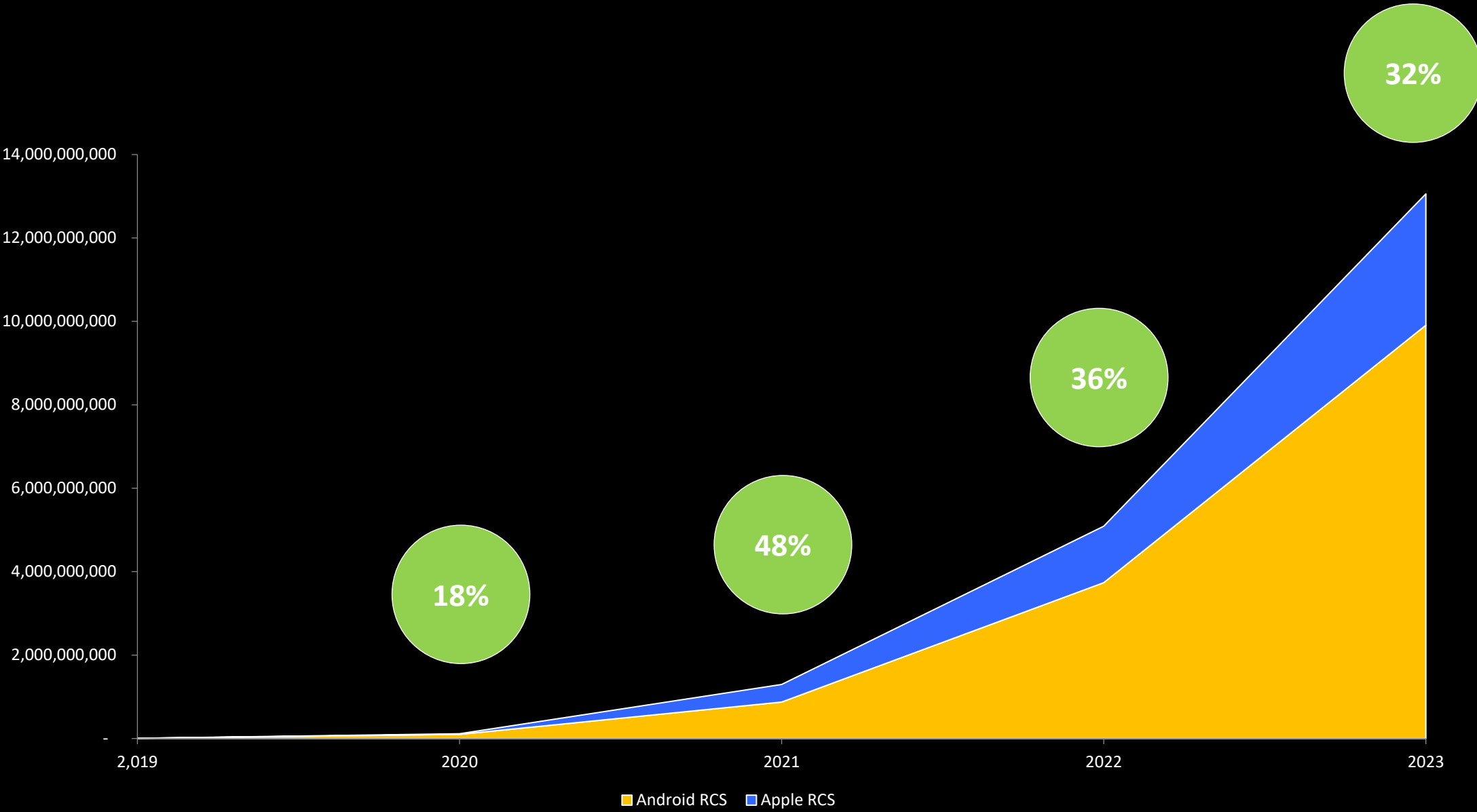
Apple RCS 1st year uplift, top 30 markets

(\$)



Apple uplift on RBM spend

(\$)



To learn more about all-things business messaging please get in touch.

Impact of COVID-19 on business messaging released June 2020

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