

# Branded Calling: An Objective Analysis From Juniper Research

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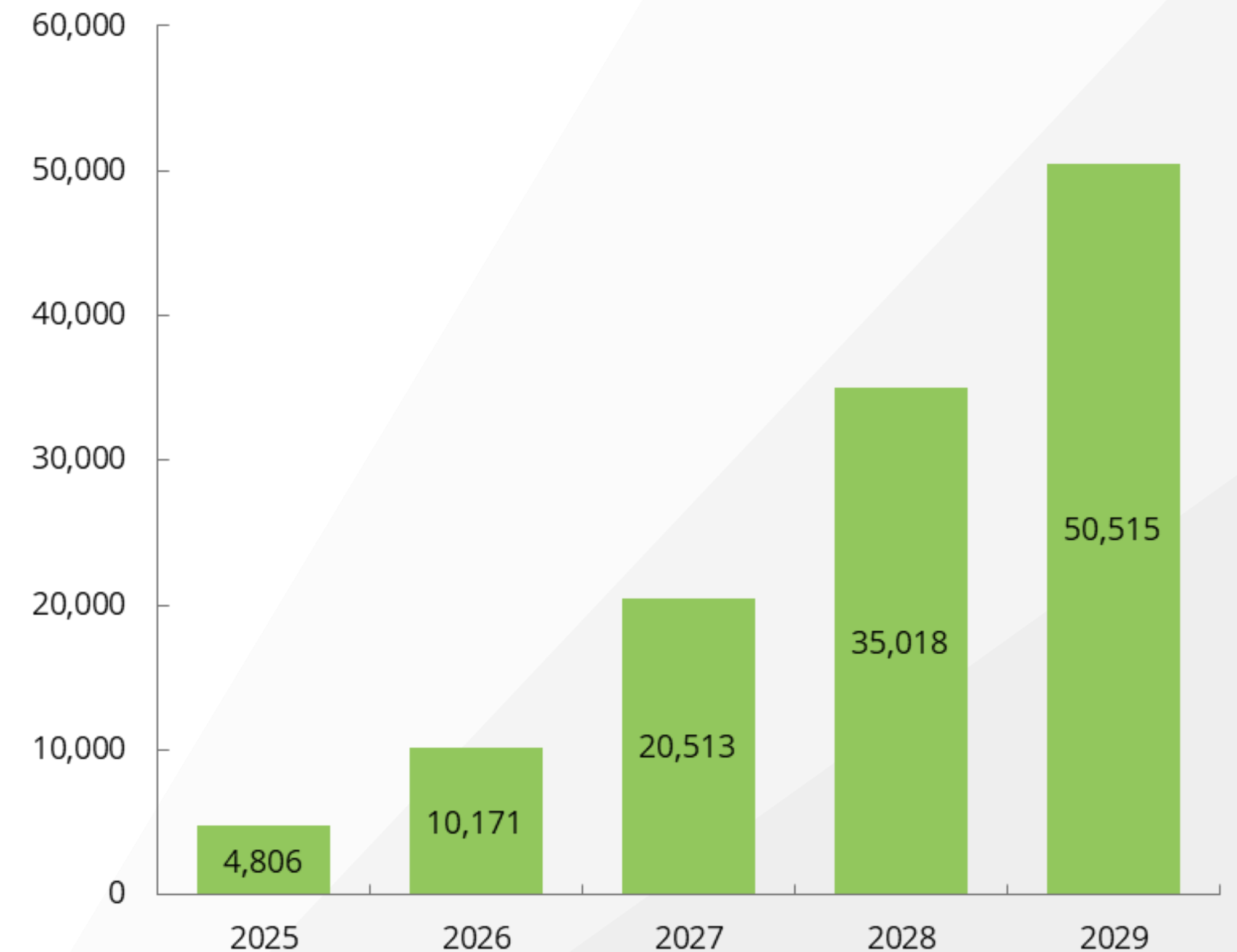
# Agenda

1. Introduction to Branded Calling
2. Future Outlook
3. The Value of the Voice Channel
4. Regulatory Intervention
5. Addressing Fragmentation
6. The Impact of AI
7. Omnichannel Attacks
8. Why Enterprise Verification Is Not Just Relevant to the Voice Channel

# The Future Outlook of Branded Calling

- Branded Calling adoption will grow geographically, as there is greater knowledge surrounding its success and benefits.
  - This will require analytics surrounding conversion rates and first contact resolution rates to encourage the adoption of Branded Calling.
- There will be greater recognition by mobile operators and enterprises of the threat to the voice channel.
- Increased deployment of 'call reason displays' to give subscribers more insight into the call they are receiving before it is answered.
- Branded Calling will be combined with robocall mitigation and spoof protection.
- The industries adopting Branded Calling will widen; from initial deployments in healthcare and financial services.
- Analytics will be crucial to quantifying conversion rates with Branded Calling.

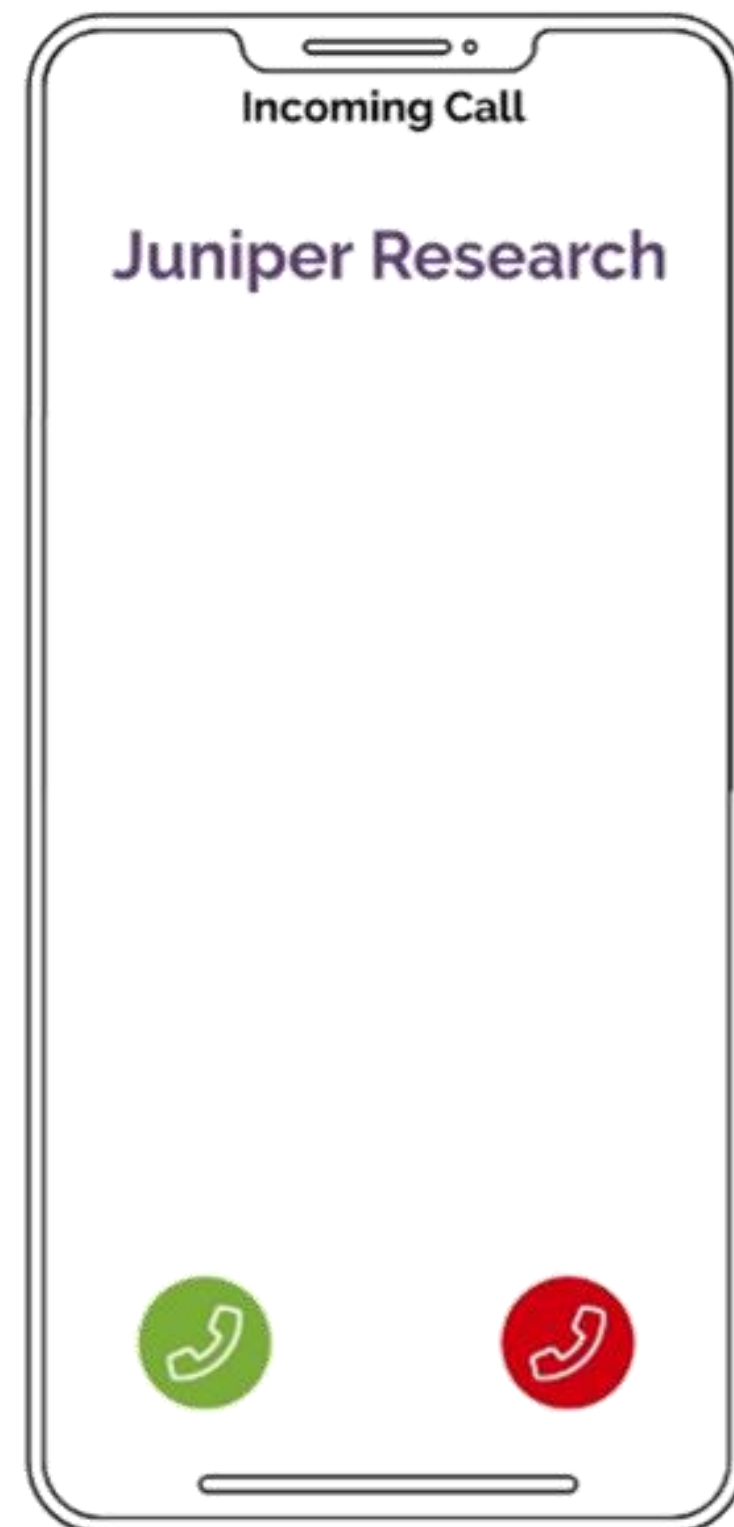
Total Branded Calling API Calls (m), 2025-2029, Global



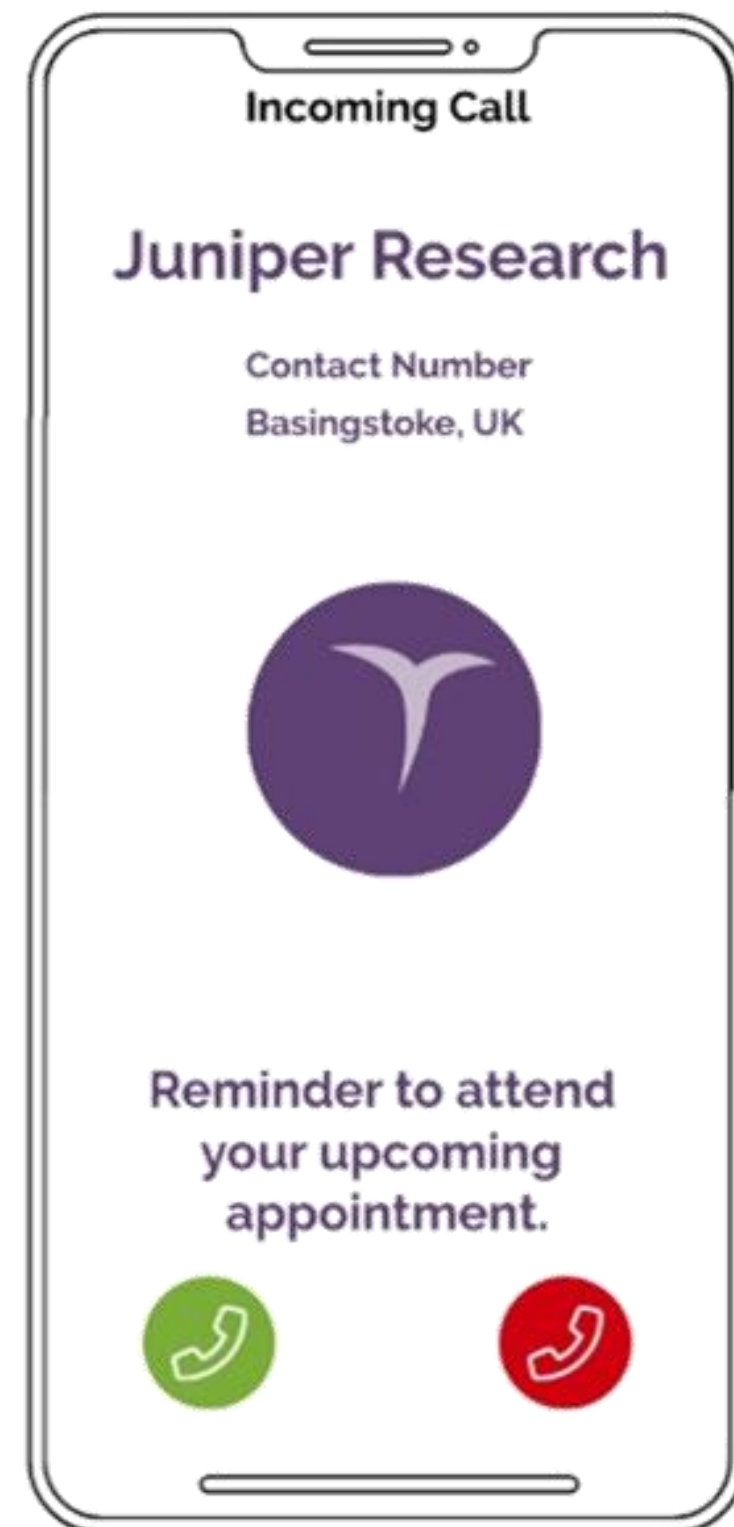
Source: Juniper Research

## Why will Branded Calling Grow?

### CNAM



### Branded Calling



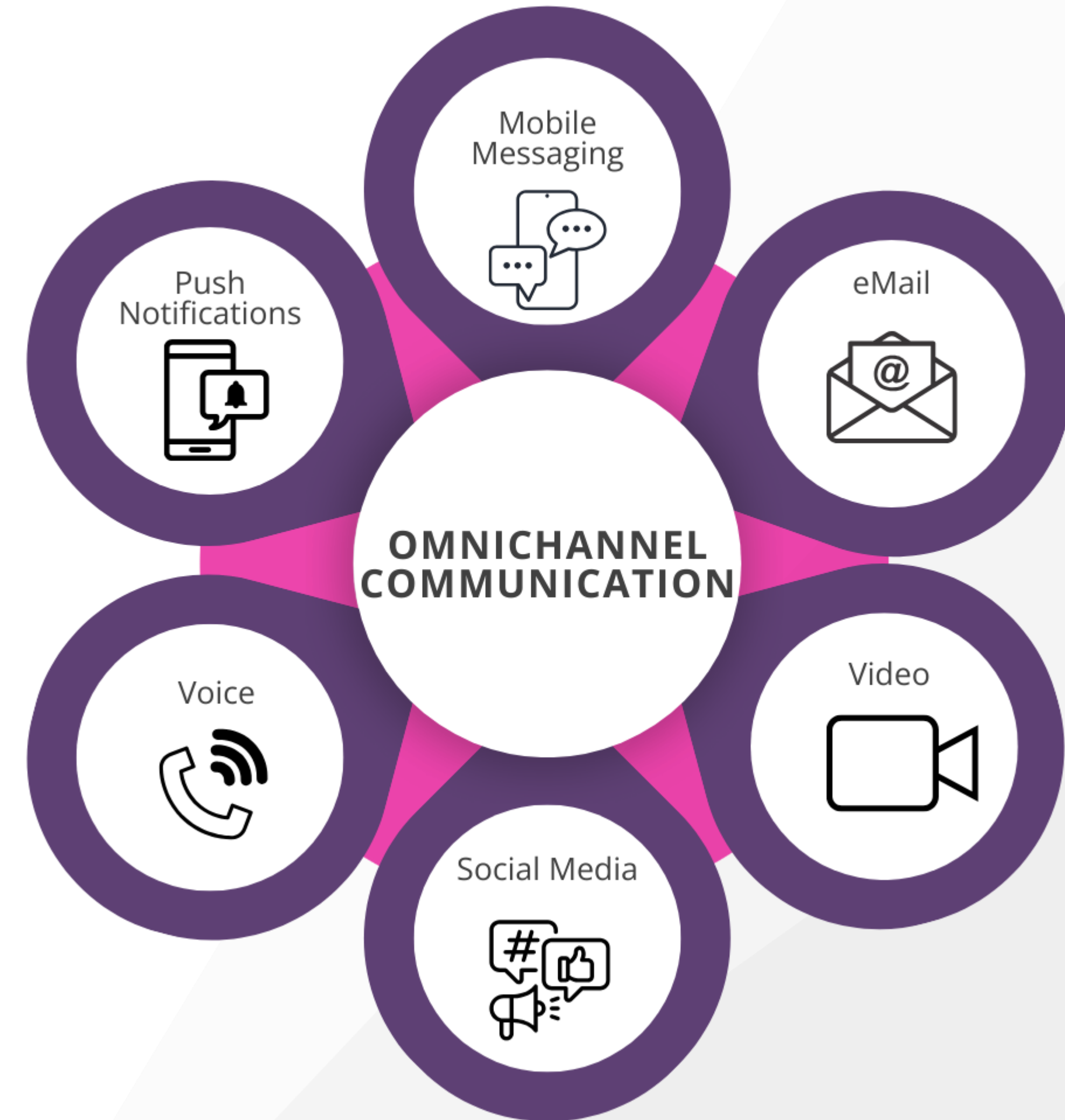
- Trust in the voice channel continues to diminish.
- Must remain an important channel for enterprises' communications with their end customers.
- Complex ecosystem of players
  - Disparate approaches to the development of services
- Initial adoption is in North America
  - Slower adoption in other countries, but Europe expected to follow.

# The Role of Regulatory Intervention

- Protecting the value of the voice channel is centred on protecting mobile subscribers.
- The onus is on both operators and telecommunications regulatory bodies to make sure that technologies are in place to accomplish this.
- There are additional sources of fraud over the voice channel, such as SIM swap and call forwarding fraud, that must be considered alongside Branded Calling.
- Protecting consumers against AI-generated voice fraud can also be aided by Branded Calling.

# The Value of the Voice Channel for Businesses

- The accessibility and ubiquity of the voice channel are key, as businesses can contact any mobile subscriber through this channel.
- Evolution of networks is creating opportunities for the voice channel – operators are currently underutilising the voice channel.
- In some instances, voice remains necessary; for example, in the healthcare industry.
- Progression to omnichannel strategies is occurring, and voice will remain a critical constituent.

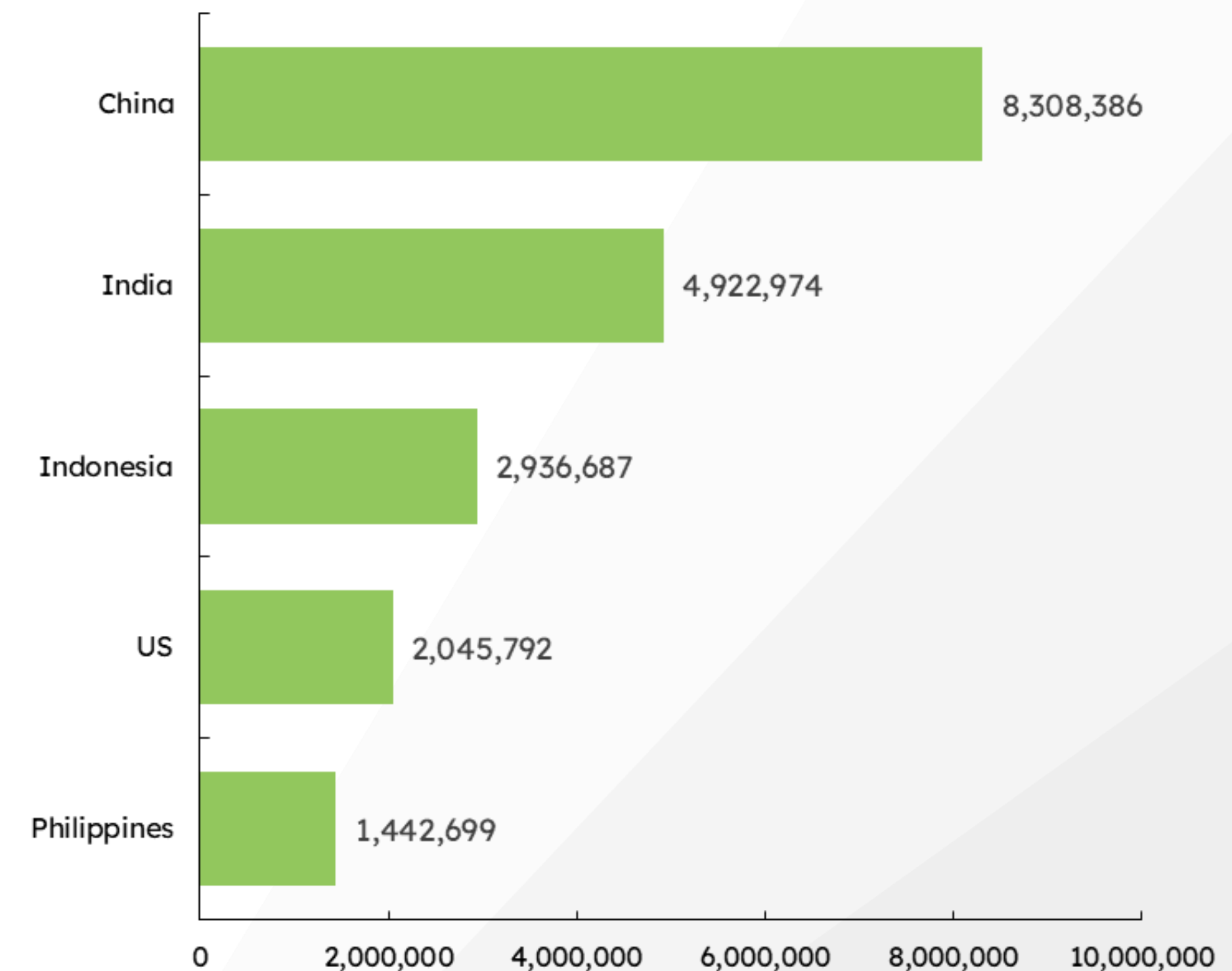




# Disparities in Branded Calling Technologies Create Large Degrees of Fragmentation

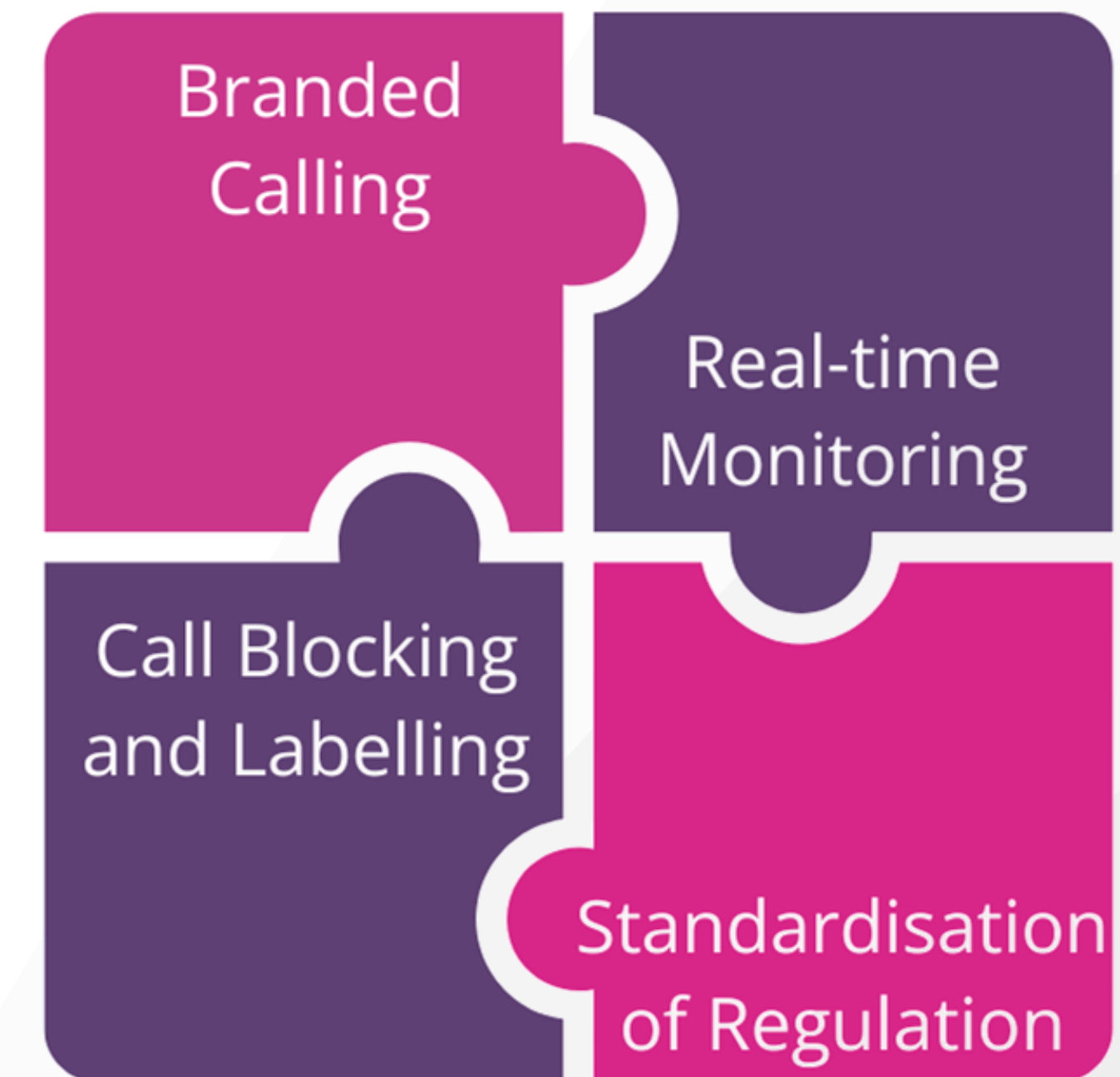
- Branded Caller ID adoption varies significantly across regions, with uneven implementation.
- It enables enterprises to display their name, logo, and call reason on recipients' phones.
- The US leads in anti-fraud efforts due to its long-standing battle with robocalls and fraud over the voice channel.
- Other countries are developing their own frameworks, separate from the US-centric STIR/SHAKEN standards.
- This global divergence may drive the need for international regulation within the next five years.

Total Number of Voice Calls from Mobile Devices in 2025 (m), Split by 5 Select Countries



## The Role of AI in Fraud is Growing – Branded Calling Must Respond

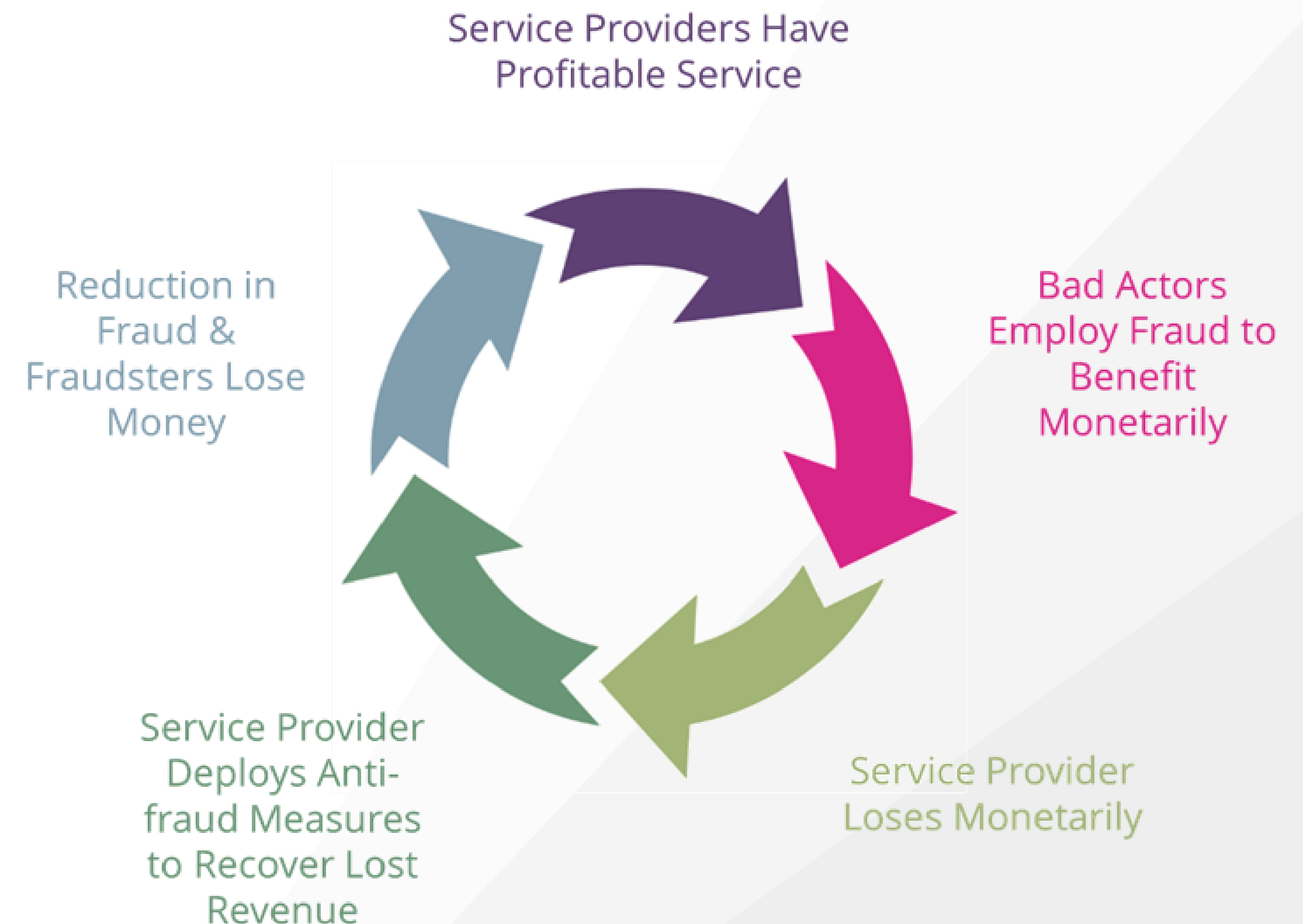
- AI is accelerating the sophistication of fraud; enabling attackers to mimic legitimate branding and caller behaviour more convincingly.
- Branded Calling solutions must evolve to counter AI-driven threats by enhancing verification and authentication mechanisms.
- Real-time analytics and adaptive defences are essential to detect and respond to AI-generated spoofing attempts.
- Cross-industry collaboration is needed to share threat intelligence and develop unified standards against AI-enabled fraud.
- Consumer trust hinges on transparency and security; making it critical for Branded Calling to stay ahead of emerging AI threats.





# Omnichannel Attacks Necessitate Closer Collaboration

- With the rise of omnichannel communications, there is always an opportunity for fraudulent players to capitalise.
- Indeed, the voice channel has become a key channel in which fraudulent players can commit fraud.
- Circular nature of fraud means that fraud will never fully disappear, rather migrate to other channels.
- Making the voice channel more appealing is not about eliminating voice fraud over the channel, but rather **increasing friction to the point where fraud over voice channels is unprofitable.**



## Enterprise Verification Relevant to More Than the Voice Channel

- Today, customers can be reached through a variety of channels.
- Customer preference has never been as valuable as it is today.
- Omnichannel communication solutions are well-established amongst B2C enterprises.
- However, current enterprise verification methods must be streamlined:
  - Amongst operators in each country
  - Amongst technologies in the omnichannel communication stack.
- Enterprise verification must be 'essential' for customer engagement moving forward.

**Questions?**

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