Instant Messaging Market, 2010-2014
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SCOPE

This study examines the market for Instant Messaging (IM) solutions from 2010 to 2014. It provides extensive data regarding current installed base as well as four year forecasts, broken out by region, business size, and other variables. This report also examines IM solution features, business strategies, plus product strengths and weaknesses.

All market numbers, such as market size, forecasts, installed base, and any financial information presented in this study represent worldwide figures, unless otherwise indicated. All pricing numbers are expressed in $USD.

METHODOLOGY

The data and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of data collected from vendors and corporate enterprises via interviews and surveys.

Secondary research sources have also been used to cross-check the data collected. These include company annual reports and market size information from various related market segments of the computer industry.

The focus of this research was worldwide.

EXECUTIVE SUMMARY

- This study looks at the Instant Messaging market as comprising four different market segments:
Public IM networks – This segment includes IM services for consumers. Public IM networks are usually free of charge, and also offer more features that go beyond simple instant messaging. Key vendors in this segment include: AOL, Facebook, Google, Microsoft, Skype, Tencent, Yahoo!, and others.

Enterprise IM platforms – This segment includes IM services tailored for business users, and include rich collaboration features, enhanced security, and integration with other business systems such as Unified Communications, Messaging and Collaboration platforms, and more. Key vendors of this segment include: Cisco, IBM, Microsoft, Novell, and others.

IM Management and Security vendors – This segment includes security and management solutions that protect the IM network from external threats, and manage IM usage within the corporate network to prevent data leakage and maintain worker productivity. Key vendors of this segment include: FaceTime, Quest Software, Symantec, and others.

IM Aggregators – This segment includes vendors that connect to multiple IM networks through a single unified client. This allows users to communicate with their contacts on different IM networks simultaneously, all from the IM Aggregator client. Key vendors of this segment include: eBuddy, Meebo, Pidgin, Trillian, and others.

All segments of the Instant Messaging market have experienced growth in the past year even as competing services such as social networking, webmail, and mobile services are growing in popularity.

Today, most Instant Messaging services go beyond basic IM and have implemented a variety of features that expand the scope of IM products and services to include all types of real-time communication, such as voice calls, voice chat, video chat, and more.

Social networking and instant messaging are becoming more integrated as Public IM clients bring social networking feeds onto their interfaces, and social networking services embed native IM services onto their websites.

Mobile IM usage continues to grow as many Public IM providers have increased their range of mobile support and have introduced new features onto their mobile applications. Continued
growth in the smartphone market and the mobile applications market will continue to motivate Public IM providers to support mobile IM functionality.

- The Enterprise IM market has experienced solid growth in the last year. More and more businesses are looking for a secure IM solution with enhanced collaboration features. IM is becoming a staple of business communications as it allows workers to collaborate in real-time and increases worker productivity.

- Enterprise IM solutions are slowly becoming assimilated into larger business software platforms such as Unified Communications, Messaging and Collaboration, and Archiving and Compliance. Some Enterprise IM offerings allow users to escalate an IM conversation into a phone call with click-to-call features, while others allow users to receive email notifications within IM conversations. Some automatically archive each instant message in compliance with government regulations and stringent corporate policy.

- Worldwide IM accounts are expected to grow from 2.3 billion in 2010 to well over 3.4 billion in 2014 at a 10% average growth rate. Worldwide IM users are expected to grow from around 1.1 billion in 2010 to over 1.6 billion in 2014 at a 10% average growth rate.

- Table 1, shows the growth in the number of worldwide IM accounts and users from 2010 to 2014. Worldwide IM accounts shown below include both Public IM and Enterprise IM.

<table>
<thead>
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<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<tr>
<td><strong>Worldwide IM Accounts (M)</strong></td>
<td>2,358</td>
<td>2,570</td>
<td>2,830</td>
<td>3,125</td>
<td>3,461</td>
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<tr>
<td>% Change</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td><strong>Worldwide IM Users (M)</strong></td>
<td>1,136</td>
<td>1,240</td>
<td>1,368</td>
<td>1,513</td>
<td>1,680</td>
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<tr>
<td>% Change</td>
<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>11%</td>
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</tr>
<tr>
<td>Average Accounts / User</td>
<td>2.08</td>
<td>2.07</td>
<td>2.07</td>
<td>2.07</td>
<td>2.06</td>
</tr>
</tbody>
</table>

Table 1: Worldwide IM Accounts and Users, 2010-2014

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