Email Archiving Market, 2011-2015

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SCOPE

This study provides an analysis of the email archiving market in 2011 and its potential growth over the next four years. It provides a detailed analysis of market trends, market size, market share by vendor, forecasts, regulations, as well as vendor products and strategies.

Email archiving solutions integrate with corporate email servers and provide *interactive*, long-term storage of email in a separate, centralized file store. Email messages are indexed for easy search and retrieval. Authorized users and compliance officers are able to access and work with messages archived in their original form at any time.

This study looks at two segments of the market:

- **Email Archiving Solutions** – include email archiving solutions offered as on-premises products for enterprise deployment.

- **Cloud Email Archiving Services** – include hosted email archiving solutions delivered as services.

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

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. in 2011. It consists of information collected from vendors, solution providers and corporations via interviews and surveys.

The focus of the research was worldwide with a heavy emphasis on the North American and European markets where most key developments in email archiving are currently occurring.

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

EXECUTIVE SUMMARY

- Email archiving solutions integrate with corporate email servers and provide *interactive*, long-term storage of email in a separate file store where, email messages are tagged and indexed for easy search and retrieval. Authorized users and compliance officers are able to access and work with messages archived in their original form at any time.

- Over the last 12 months, email archiving vendors have continued to expand their archiving portfolios through the addition of support for other electronic content sources beyond simply email. Many vendors are now offering support for the following content sources: Microsoft SharePoint, social media, and file archiving.

- The increase in the number of content sources that archiving products can now support has lead to greater search functionality and more centralized management features. Federated search allows users or administrators to search, manage, and retrieve data across all content sources with a single search query. The management of content repositories is also simplified as administrators can apply corporate policies and rules across all archived content.

- On-premises email archiving solutions are still the dominant deployment model with most businesses. Over 73% of all email archiving users are utilizing an on-premises solution today, while only 27% of users are relying on a cloud email archiving service.

- The market for cloud based archiving services, however, has continued to grow at a much more rapid pace than on-premises archiving solutions. More businesses have turned to cloud services during the recent economic downturn because these services offer more predictable monthly costs and require smaller initial investments.

- Archiving vendors today often offer a variety of add-on and complementary solutions that integrate with their email archiving products. Some of these solutions include security, email management, advanced search, and more. Two new add-on solutions that more email archiving vendors are offering are social media and Microsoft SharePoint archiving. eDiscovery and Data Loss Prevention (DLP) solutions offered by the archiving vendor or through 3rd party solutions, also continue to be most often deployed alongside email archiving solutions.

  - *eDiscovery* solutions enable organizations to identify, collect, analyze, process, and present data stored in various corporate repositories. The data may be collected in response to lawsuits, internal investigations, or regulatory compliance requests.

  - *Data Loss Prevention (DLP)* solutions are advanced electronic data supervision products and services that enable companies to prevent non-compliant activity from occurring.

- Figure 1, shows the worldwide Email Archiving market revenue from 2011 to 2015. The worldwide archiving market, including both on-premises and cloud (i.e. hosted) solutions, is expected to reach nearly $2.5 billion in revenues by the end of 2011, and grow to over $4.8 billion by 2015.
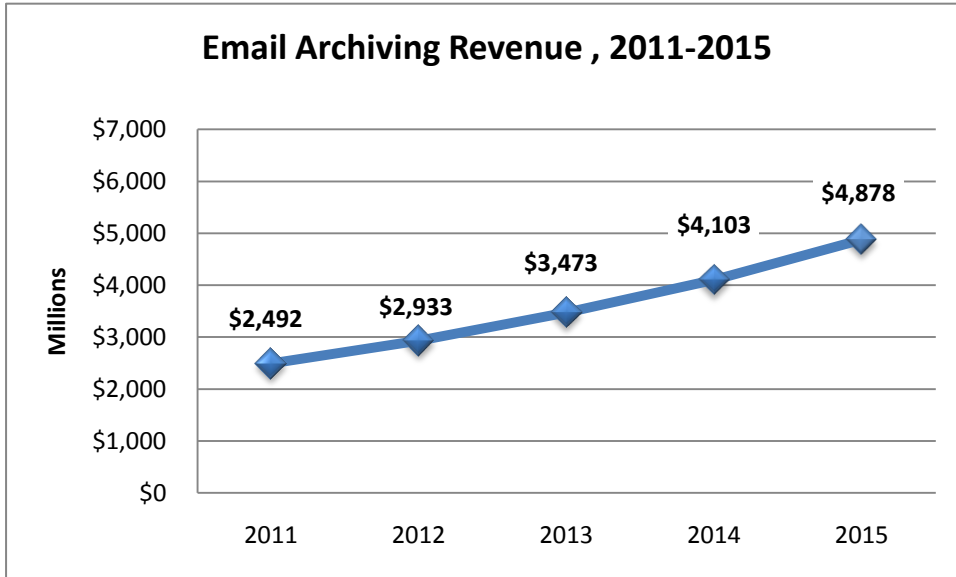
Email Archiving Revenue , 2011-2015

Figure 1: Worldwide Email Archiving Revenue, 2011-2015

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