



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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Email Statistics Report, 2013-2017

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SCOPE

This report brings together statistics and forecasts for Email, Instant Messaging (IM), Social Networking, Mobile Email, and Mobile IM usage. It includes data on both business and consumer usage.

All figures in this report represent a ‘snap shot’ of key statistics in 2013. If a discrepancy occurs between numbers in this report and any numbers in our annual market research studies, the annual report should be considered the final authoritative source. For a full list of our annual reports which contain in-depth quantitative and qualitative analysis of each industry segment we cover, please refer to our list of publications at <http://www.radicati.com>.

All of the numbers in this study represent worldwide figures, unless otherwise indicated. All financial data is expressed in \$USD.

Installed base numbers throughout this report represent *active* accounts, which have been actually installed (vs. shipped) and accessed at least once within the last 3 months.

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METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- The total number of worldwide email accounts is expected to increase from nearly 3.9 billion accounts in 2013 to over 4.9 billion accounts by the end of 2017. This represents an average annual growth rate of about 6% over the next four years.
- Email remains the go-to form of communication in the Business world. In 2013, Business email accounts total 929 million mailboxes. This figure is expected to grow at an average annual growth rate of about 5% over the next four years, and reach over 1.1 billion by the end of 2017. The majority of Business email accounts are currently deployed on-premises. However adoption of Cloud

Business email services, particularly Google Apps and Microsoft Office 365, is expected to rapidly increase over the next four years.

- Consumer email accounts currently make up the vast majority of worldwide email accounts, accounting for 76% of worldwide email accounts in 2013. Consumer email accounts are typically available as free offerings. Consumer email accounts’ market share is expected to steadily increase over the next four years, as more people come online on a worldwide basis and email continues to be a key component of the online experience. Email accounts are required for users to sign up for social networking sites, such as Facebook and Twitter, instant messaging, and more.

	2013	2014	2015	2016	2017
Worldwide Email Accounts (M)	3,899	4,116	4,353	4,626	4,920
Business Email Accounts (M)	929	974	1,022	1,078	1,138
<i>% Business Email Accounts</i>	<i>24%</i>	<i>24%</i>	<i>23%</i>	<i>23%</i>	<i>23%</i>
Consumer Email Accounts (M)	2,970	3,142	3,331	3,548	3,782
<i>% Consumer Email Accounts</i>	<i>76%</i>	<i>76%</i>	<i>77%</i>	<i>77%</i>	<i>77%</i>

Table 1: Business vs. Consumer Email Accounts (M), 2013–2017

- In 2013, the majority of email traffic comes from business email, which accounts for over 100 billion emails sent and received per day. Email remains the predominant form of communication in the business space. This trend is expected to continue, and business email will account for over 132 billion emails sent and received per day by the end of 2017.
 - Consumer email traffic, on the other hand, is expected to decrease over the next four years. Despite a growing number of Consumer email accounts and users, Consumers are now opting to use social networking sites, instant messaging, Mobile IM, and text messaging for instantaneous communication with family and friends.

Daily Email Traffic	2013	2014	2015	2016	2017
Total Worldwide Emails Sent/Received Per Day (B)	182.9	191.4	196.4	201.4	206.6
<i>% Growth</i>		5%	3%	3%	3%
Business Emails Sent/Received Per Day (B)	100.5	108.8	116.2	123.9	132.1
<i>% Growth</i>		8%	7%	7%	7%
Consumer Emails Sent/Received Per Day (B)	82.4	82.6	80.2	77.5	74.5
<i>% Growth</i>		0%	-3%	-3%	-4%

Table 2: Worldwide Daily Email Traffic (B), 2013-2017

- Instant Messaging (IM) is also showing slower growth due to increased usage of social networking, text messaging, Mobile IM, and other forms of communication by both Business and Consumer users. In 2013, the number of worldwide IM accounts totals over 2.9 billion.
 - Mobile IM, however, is expected to show strong growth over the next four years, primarily due to increased mobile adoption by Consumers on a worldwide basis. In 2013, worldwide Mobile IM is expected to total 460 million accounts.
- Social Networking will grow from about 3.2 billion accounts in 2013 to over 4.8 billion accounts by the end of 2017. The majority of social networking accounts still come from the Consumer space, however, business-oriented Enterprise Social Networks are also showing strong adoption.

	2013	2014	2015	2016	2017
Worldwide Social Networking Accounts (M)	3,190	3,615	4,078	4,459	4,861
<i>%Growth</i>		13%	13%	9%	9%
Worldwide Social Networking Users* (M)	1,091	1,202	1,319	1,443	1,573
<i>% Growth</i>		10%	10%	9%	9%
Average Accounts Per User	2.9	3.0	3.1	3.1	3.1

Table 3: Worldwide Social Networking Accounts and User Forecast (M), 2013-2017

(*) *Note: Includes both Business and Consumer Social Networking users.*

- The Mobile Email market has shown strong growth over the past year, a trend that is expected to continue. Anywhere access has become a common feature for all users, who now access their mail from a number of devices, at any time and from any location. Growth of Mobile email use is driven by affordable and advanced mobile devices, which allow users to easily access their email accounts from their mobile devices. In 2013, worldwide mobile email users, including both Business and Consumer users, total 897 million.

	2013	2014	2015	2016	2017
Worldwide Mobile Email Users* (M)	897	1,152	1,422	1,632	1,779
<i>% Growth</i>		28%	23%	15%	9%

Table 4: Worldwide Mobile Email User Forecast (M), 2013-2017

(*) *Note: Includes both Business and Consumer Mobile email users.*

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