



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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Mobile Statistics Report, 2014-2018

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SCOPE

This report brings together statistics and forecasts for Mobile Users, Mobile Devices including phones and tablets, Mobile Email Users, and Mobile IM usage. It includes data on both business and consumer mobile adoption.

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

Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World. This report does not contain country breakouts but these may be obtained from The Radicati Group at an extra charge.

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.

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:

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- 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

- In 2014, the number of worldwide mobile users including both business and consumers will reach over 5.6 billion. By the end of 2018, the number of worldwide mobile users is expected to increase to over 6.2 billion. Roughly 84% of the world population will be using mobile technology by year-end 2018.
 - Mobile devices in use, including both phones and tablets, will grow from over 7.7 billion in 2014 to over 12.1 billion by 2018.

	2014	2015	2016	2017	2018
Worldwide Mobile Users (M)	5,674	5,808	5,945	6,085	6,228
Total Mobile Devices* (M)	7,733	8,627	9,628	10,825	12,165
Mobile Devices Per Business User	1.36	1.49	1.62	1.78	1.95

Table 1: Worldwide Mobile Users vs. Mobile Devices, 2014-2018

(*) Note: Includes both phones and tablets.

- The Mobile Email market continues to grow rapidly. Growth within this market can be attributed to both consumer and business users who are increasingly accessing their email accounts from their mobile devices, particularly on popular smartphone Apple iOS and Google Android powered devices. The number of users that use a mobile device for both personal and professional purposes has led to a significant increase in the number of mobile email users around the world. This strong growth is expected to continue over the next four years.
- In 2014, worldwide Mobile email users will total over 1.1 billion. Currently, 46% of email users access their email via a mobile device. By the end of 2018, worldwide mobile email users are expected to total over 2.2 billion due to the proliferation of mobile devices. By this time, we expect 80% of email users will access their email accounts via a mobile device.

	2014	2015	2016	2017	2018
Worldwide Mobile Email Users* (M)	1,152	1,422	1,732	2,002	2,282
<i>% Growth</i>		23%	22%	16%	14%

Table 2: Worldwide Mobile Email User Forecast (M), 2014-2018

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

- Mobile IM, which refers to instant messaging services designed primarily for use on mobile devices will also show strong growth over the next four years. These services have become immensely popular as the worldwide population of smartphone devices continues to increase. Mobile IM services are primarily used by consumers, with the exception of BlackBerry Messenger which is used primarily by business users.
 - The Mobile IM market will show strong growth over the next four years, growing from 1,423 million accounts in 2014, to over 3.8 billion accounts by the end of 2018. This represents an average annual growth rate of about 29%.

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