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Cloud Business Email Market, 2016-2020

SCOPE

This study provides an analysis of the Cloud Business Email market in 2016, and its potential growth over the next four years. It provides detailed market trends, market share, market size, forecasts, and an analysis of key Cloud Business Email providers.

This study segments the market as follows:

- **Cloud Business Email** are cloud-based email services targeted at business organizations of all sizes, for use in a multi-tenant or dedicated (i.e. private cloud) environment.
- **Hosted Microsoft Exchange Partners** is a sub-segment of Cloud Business Email providers that offer Hosted Microsoft Exchange services to their subscribers.

The report also includes forecasts and detailed breakouts for **Google Apps for Work**.

Revenues, pricing, and all currency figures presented in this study are expressed in \$USD, unless otherwise indicated.

All market numbers represent worldwide figures, unless otherwise indicated.

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Installed base mailbox figures represent *active* mailboxes, which we define as mailboxes that are used at least once every three months. Email aliases are not counted as a separate unit.

Note: The terms “installed base,” “accounts,” “seats,” and “mailboxes” are used interchangeably in this report.

METHODOLOGY

The information and analysis in this report is 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.

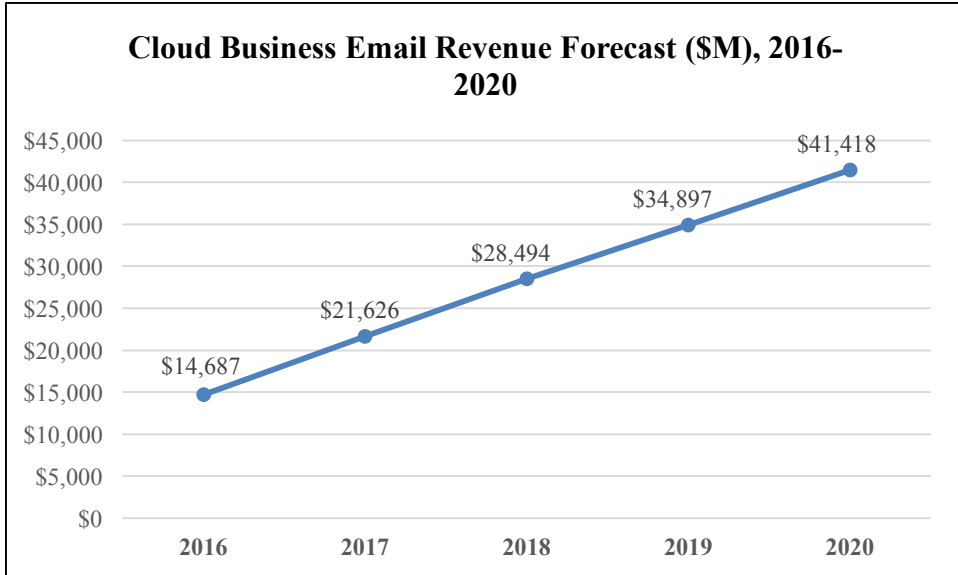
Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Business email is rapidly shifting from on-premises deployments to the cloud. SMBs are no longer the main adopters of Cloud Business Email solutions, increasingly mid-market and large organizations are also rapidly moving to cloud email.

- We categorize the Cloud Business Email market according to the following segments:
 - **Cloud Business Email Providers** offer cloud-based email and collaboration services that provide feature-rich services to organizations of all sizes.
 - **Hosted Microsoft Exchange Partners:** is a sub-segment of Cloud Business Email providers, which offer Hosted Microsoft Exchange services to their subscribers.
- Cloud Business Email services are available through different models which include:
 - *Multi-tenant* – in a public cloud model, email and other services for different customers reside concurrently on the service provider’s infrastructure. Multi-tenancy allows Cloud Business Email providers to offer highly attractive price points to customers.
 - *Dedicated* – in a private cloud model, Cloud Business Email providers host all of a single organization’s services on dedicated servers. Dedicated deployments allow for much more flexibility in terms of customization, and ensure better privacy. Dedicated deployments are, however, typically more costly.
- Multi-tenancy is currently the most common form of Cloud Business Email deployment. However, Dedicated (i.e. private cloud) deployments are also seeing strong growth as more mid-market and enterprise organizations migrate to the cloud and prefer the higher level of customization that a dedicated option provides.
- Figure 1, shows the worldwide revenue forecast for Cloud Business mailboxes, from 2016 to 2020. The Cloud Business Email market is expected to generate over \$14.6 billion in revenues in 2016 and grow to over \$41.4 billion by 2020.



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