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Instant Messaging Market, 2008-2012

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SCOPE

This study examines the market for Instant Messaging (IM) solutions from 2008 to 2012. It provides extensive data regarding current installed base, broken out by region, business size, and other variables, including four year forecasts. 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 information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from vendors, and users within global corporations via interviews and surveys.

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.

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EXECUTIVE SUMMARY

- In the past year, Instant Messaging vendors have seen a significant shift from enterprises using Public IM to purchasing and deploying Enterprise IM networks with enhanced security and robust administrative control functions.
- Enterprise IM platforms are also increasingly evolving into comprehensive real-time communication platforms, or unified communications solutions. Vendors have begun integrating IM with email, voice and video chat, and Web conferencing capabilities, enabling users to access several communication channels from a single point. The primary focus of this report, however, is on instant messaging, and not “unified communications” or “comprehensive real-time messaging solutions.”
- IM has also been widely-embedded onto social networking sites, and various other Web sites. The increasing trend is to integrate IM with other products, and offer it as part of a larger collaboration solution. This may indicate the end of stand-alone traditional IM as we know it.
- As the market has matured, IM providers have added various new features to keep consumers engaged. With an emphasis on Web 2.0 interactivity, providers have added features such as avatars, games, music, social networking capabilities, and various background designs.
- This study looks at the Instant Messaging market as comprising four segments:
 - *Public IM networks* which comprise consumer-focused IM such as AOL AIM, and Yahoo! Messenger, and others.
 - *Enterprise IM platforms* which provide businesses and organizations with more secure communication plus business-relevant IM functions and tools, without the consumer-IM product frills.
 - *IM Management and Security vendors* which offer enhanced IM security, protecting against malicious code, and provide compliance archiving capabilities.
 - *IM Aggregators* which enable users to sign-on to multiple public IM and enterprise IM accounts simultaneously to contact buddies from a single user-interface.
- IM security continues to be a concern for organizations, albeit, a relatively low one. Unlike email SPAM, IM users rarely come across SPIM. Plus, IT departments consistently keep an eye

out for any potentially threatening SPIM and quickly notify employees when they come across one. Users have mostly learned to ignore suspicious IM as well.

- We expect IM accounts to grow from 1.8 billion in 2008, to over 3.7 billion in 2012. The number of IM users is expected to rise from 759 million users in 2008, to a little over 1.5 billion in 2012.
- Table 1, shows the growth in the number of worldwide IM accounts and users from 2008 to 2012. Worldwide IM accounts include both Public IM and Enterprise IM.

Worldwide IM Accounts and Users, 2008-2012					
	2008	2009	2010	2011	2012
Worldwide IM Accounts (M)	1,892	2,486	3,022	3,381	3,754
% Change		31%	22%	12%	11%
Worldwide IM Users (M)	759	1,008	1,242	1,411	1,581
% Change		33%	23%	14%	12%
Average Accounts / User	2.5	2.5	2.4	2.4	2.4

Table 1: Worldwide IM Accounts and Users, 2008 – 2012

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