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Wireless Email Market, 2009-2013

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SCOPE

This study covers the Worldwide Wireless Email market in 2009, and its expected growth over the next four years. In this study, we focus on the market for ‘push’ email products. ‘Pull’ email, SMS text messaging, and paging are not included in this report.

We provide data on current worldwide installed base, vendor installed base, and revenue market share, as well as worldwide forecasted market growth in terms of both installed base and revenue from 2009 to 2013.

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information present in this study represent worldwide figures, geographical breakouts are also provided. 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. It consists of information collected from vendors, network operators, 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

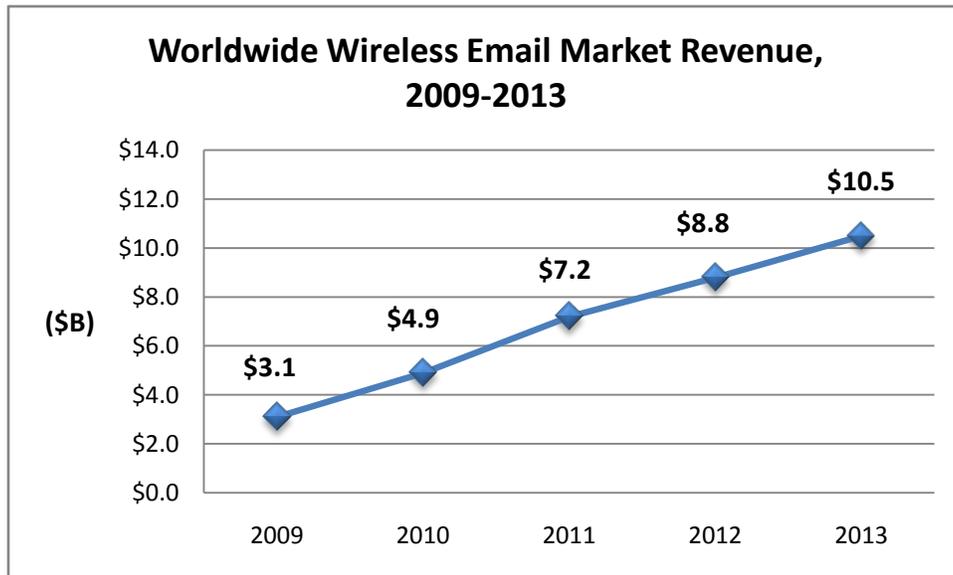
- This report provides an analysis of the Worldwide Wireless Email market in 2009, and its potential growth over the next four years. It focuses primarily on **Wireless ‘Push’ Email solutions**, which provide real-time access to email messages without user intervention.
- In 2009, the wireless email market will total 139 million users. Over the next four years, we expect this figure to increase at an average annual rate of 68%, totaling over 1 billion mailboxes by year-end 2013.
- This report focuses on three segments of the wireless Email market:
 - **Enterprise Wireless Email Solutions:** This segment includes wireless email solutions aimed primarily at business users with strict security needs, and a high-level of manageability features.
 - **Consumer Wireless Email Solutions:** This segment includes more basic email solutions targeted at the prosumer/consumer market. Consumer Wireless Email solutions focus less on business-grade security, and management capabilities, striving instead for accessibility via low-cost devices.
 - **Wireless OS Platforms:** This segment includes mobile operating systems that enable wireless messaging on mobile devices.
- Email continues to be a vital application for all businesses, and it is often the primary line of communication. Just as Unified Communications solutions have made mobile devices an extension of worker desktop phones, wireless email solutions have become an extension of worker desktop email applications.
- The Wireless Email market is a complex ecosystem made up of software and hardware vendors, wireless carriers, mobile device manufacturers, and OS

platform suppliers. Each is an important player in delivering wireless email to users.

- Explosive growth within the smartphone market has contributed to the increase in wireless email users. Smartphones are now viewed as powerful application platforms, more similar to a computer than a device used to simply make calls. Smartphones are built with more powerful processors, some even capable of running multiple applications simultaneously. Application developers have recognized the tremendous amount of potential within this segment, and the explosion in downloadable applications has proven this.
- While the Wireless Email market is dominated by smartphones, the sheer number of consumer-oriented feature phones around the world has also caught the attention of many wireless email vendors, and network operators. A broad range of different solutions are emerging to deliver wireless email to non-smartphones.
- Tremendous growth is expected for the Consumer Wireless Email solutions segment. The availability of low cost solutions, along with growing demand from the consumer/prosumer sector will lead the Consumer segment to nearly double each year through 2013.
- ISP, and Webmail providers have a great opportunity to excel within the Consumer Wireless Email solutions segment because of their large existing installed base of subscribers. Just a small fraction of current subscribers are currently taking advantage of the wireless messaging functionality, but this fraction already translates into millions of users.
- The Wireless OS Platform segment remains a key component of the Wireless Email market. The operating systems are what make the push email process possible on mobile devices. Rapid advances have been made over the last 12 months which have contributed to enhanced services, more powerful devices, improved end-user experiences, and more.
- The mobile device application market has rapidly grown over the last 12 months. All of the major smartphone OS developers have some type of online application marketplace where users can download applications to their devices. The actual

process of downloading an application has been simplified. Users can search, browse, and purchase applications from their mobile devices, or from an online portal via desktop computer. All applications can be downloaded over-the-air directly to a mobile device.

- The worldwide market for Wireless Email, including Enterprise Wireless Email solutions, and Consumer Wireless Email solutions, will total over \$3 billion in 2009, and grow to \$10.5 billion in 2013.



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