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Instant Messaging Market, 2009-2013

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SCOPE

This study examines the market for Instant Messaging (IM) solutions from 2009 to 2013. 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.

EXECUTIVE SUMMARY

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- This study looks at the Instant Messaging market as comprising four different market segments:
 - *Public IM networks* – This segment includes free IM services which primarily target consumers, but are also prevalent amongst business users. Vendors within the Public IM segment include: *AOL, Google, Microsoft, Skype, Tencent, Yahoo!*, and others.
 - *Enterprise IM platforms* – This segment includes enterprise instant messaging platform vendors which cater specifically to business environments by providing more secure communication and business-oriented tools, and robust management capabilities. Vendors within the Enterprise IM segment include: *Cisco, IBM, Microsoft, Novell*, and others.
 - *IM Management and Security vendors* – This segment includes products which are generally deployed on top of an IM platform, to provide enhanced security and robust administrative controls to protect against malicious code and information leakage. Vendors within the IM Management and Security segment include: *FaceTime, Quest Software, Symantec*, and others.
 - *IM Aggregators* – This segment includes vendors that offer services that aggregate multiple IM networks on one site or client, enabling users with multiple instant messaging accounts to log-in with a single screen-name and view all contacts on one consolidated buddy list. Vendors within the IM Aggregators segment include: *eBuddy, Meebo, Pidgin, Trillian*, and others.
- Over the last 12 months the Public IM market has experienced solid growth. Public IM networks continue to be quite popular among consumers due to free costs, feature-rich services, and interactive user experiences.

- Public IM services have advanced to become more than just text-based real-time communication. Standard features among most vendors now include video chat and conferencing, file sharing, games, social networking integration, and more.
- Strong growth in the use of mobile devices has led to an increase in Public IM vendors offering mobile services to their users. Growth within the smartphone market and mobile application market has made mobile IM services as downloadable applications very popular among consumers. Several Public IM services can also be accessed on non-smartphones through web-based applications.
- The Enterprise IM market has continued to grow over the last 12 months, experiencing strong growth in heavily regulated sectors such as government, and financial services. These strictly regulated industries require more stringent security features, and archiving capabilities which Public IM services are unable to provide.
- Growth of the Enterprise Unified Communications market has led to an increase in integrated functionality between IM services and other corporate communication services such as email, audio and video conferencing, and telephony. Integration within some Enterprise IM services allows users to escalate an IM conversation to a phone conference with a click-to-call feature. Other services allow users to receive new email message notifications within their IM client.
- The IM Management and Security market has continued to grow over the last 12 months as inbound and outbound threats via IM networks remain a concern for IT administrators. The most common inbound IM threat is malware, which is usually a result of a user accepting and downloading malicious content in the form of a file transfer via IM. Outbound threats include information leakage, and distribution of illicit content.
- The IM Aggregator market has seen tremendous growth over the last 12 months. IM Aggregator services, which allow users to sign into multiple accounts with access from a single interface, have rapidly evolved alongside the Social Networking market. Most IM Aggregators integrate with popular Social

Networking sites, and now support services such as Facebook Chat, and MySpace IM.

- We expect the number of IM accounts, including both Public and Private IM, to grow from 2.1 billion in 2009, to over 3.2 billion in 2013. The number of IM users is expected to rise from over 1 billion users in 2009, to over 1.5 billion in 2013.
- Table 1, shows the growth in the number of worldwide IM accounts and users from 2009 to 2013. Worldwide IM accounts shown below include both Public IM and Enterprise IM.

	2009	2010	2011	2012	2013
Worldwide IM Accounts (M)	2,144	2,396	2,685	2,955	3,260
% Change		12%	12%	10%	10%
Worldwide IM Users (M)	1,077	1,131	1,276	1,412	1,568
% Change		5%	13%	11%	11%
Average Accounts / User	2.0	2.1	2.1	2.1	2.1

Table 1: Worldwide IM Accounts and Users, 2009 – 2013

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