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Wireless Email Market, 2010-2014

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SCOPE

This study covers the Worldwide Wireless Email market in 2010, and its expected growth over the next four years. It encompasses the market for wireless email solutions including both business and consumer offerings.

We provide data on current worldwide market size, installed base and revenue market share by vendor, as well as worldwide market growth forecasts in terms of both installed base and revenue from 2010 to 2014.

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.

EXECUTIVE SUMMARY

- This report provides an analysis of the Worldwide Wireless Email market in 2010, and its potential growth over the next four years. While it focuses extensively on Wireless ‘Push’ Email solutions available on smartphones, it also covers email access from mobile web browsers.
- The Wireless Email market has continued to mature, with the number of wireless email users worldwide increasing significantly over the last year. This increase in users can be attributed to organizations providing wireless email connectivity to more of their employees, extending mobile messaging beyond high-level executives and a few select departments, to encompass a broader range of their workforce.
- This report focuses on four segments of the Wireless Email market:
 - **Enterprise Wireless Email Solutions:** This segment includes wireless email solutions aimed primarily at business users with strict security requirements, who need a high-level of manageability features.
 - **Consumer Wireless Email Solutions:** This segment includes more basic wireless email solutions targeted at the prosumer/consumer market. Consumer Wireless Email solutions focus less on business-grade security, and management capabilities, striving instead for ubiquitous access via high-end smartphones, middle-tier smartphones, low-cost feature phones, and tablets.
 - **Wireless Email for Service Providers:** This segment includes vendors that develop wireless email technology and license it primarily to mobile operators and/or device manufacturers.
 - **Wireless OS Platforms:** This segment includes the mobile operating systems that enable wireless messaging on mobile devices.
- The increase in “personal use” devices within the enterprise has led to a rise in mobile device management technology. The use of multiple devices, and mobile operating systems has increased the workload for administrators responsible for monitoring, and managing all employee-used devices. Support for multiple mobile platforms has become a key requirement for most organizations that now allow more than just one company-sanctioned mobile device.

- Tablets have also made a big splash over the last year, most notably Apple's iPad. The tablet is an intriguing device, sitting somewhere in between a smartphone and a netbook. Most tablets being developed lack a physical keyboard, and incorporate a touchscreen, and mobile OS to power the device. Average tablets have screens that range from seven to ten inches. For now, most manufacturers are producing tablets that include a mobile OS, but lack voice functionality. Calling capabilities, however, may be added to some devices in the future. Many wireless email vendors have already begun or plan to add support for tablets as their popularity continues to grow.
- The Consumer Wireless Email segment has also exploded over the last year. Most ISP/Webmail providers now offer free services with more features that are easy to download and use with most mobile devices. Formerly premium features, such as synchronization of calendar and contacts, are now standard features that ISP/Webmail providers offer for free, in addition to wireless email capabilities.
- The Wireless Email for Service Providers segment has shown strong growth over the last year. Mobile operators are now more than ever interested in bundling wireless email technology into their service offerings. The massive amount of email users buying devices, coupled with lucrative profit sharing plans have caused many mobile operators to turn to a wireless email for service providers vendor.
- The explosion in smartphone growth over the last year can be partly attributed to the rapid decline in price for mobile devices with smartphone OS's. Mobile device manufacturers have been able to integrate these smartphone platforms into lower end, cheaper devices. Google's Android platform is the most notable OS that has found its way into lower end devices over the last 12 months. The open source nature of the OS makes it easier for device manufactures to modify, and integrate the platform into devices that have less powerful processors, and lower resolution screens.
- The worldwide market for Wireless Email, including all segments, will total \$3.7 billion in 2010, and grow to \$8.3 billion in 2014.

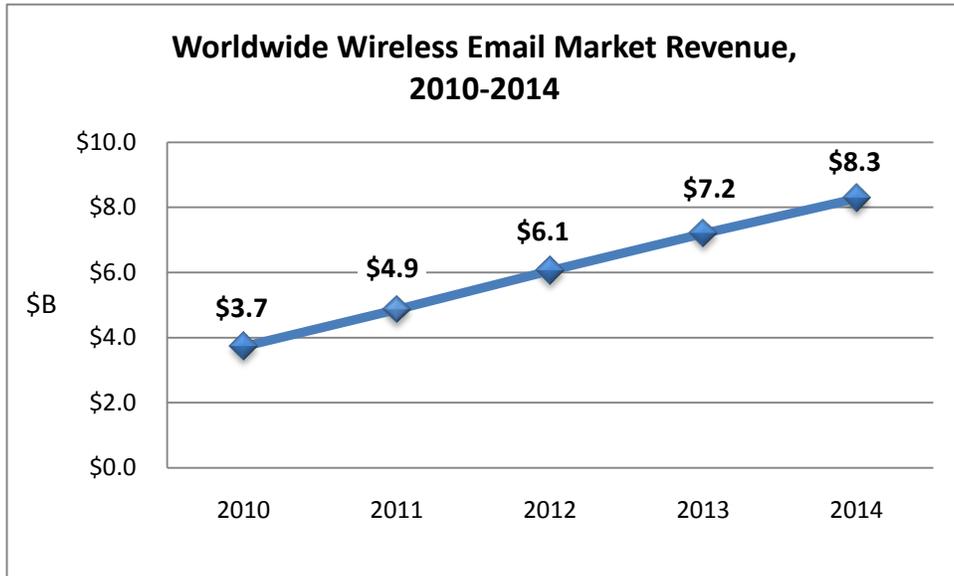


Figure 1: Worldwide Wireless Email Market Revenue, 2010-2014

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