

THE RADICATI GROUP, INC.  
A TECHNOLOGY MARKET RESEARCH FIRM

## Google Email and Collaboration Market Analysis, 2011-2015

<http://www.radicati.com>

Cost – US \$3,000 by company P.O. or \$2,500 by credit card

A comprehensive analysis of the market penetration of Google Messaging and Collaboration solutions, including Google Gmail, Google Apps, Google Message Security, Google Message Discovery, Google Talk, Google Voice, and Google Android in the business and consumer markets. The study includes:

- ☒ Installed Base, Revenue and Four-Year Forecasts
  - Version Breakouts – Installed Base and Forecasts
  - Business Size Breakouts – Installed Base and Forecasts
  - Regional Breakouts for North America, EMEA, APAC, and Rest of the World – Installed Base and Forecasts
- ☒ Product Analysis, including Strength and Weaknesses for Google Gmail, Google Apps, Google Message Security, Google Message Discovery, Google Talk, Google Voice, and Google Android.

This report is intended for Organizations, Vendors, and Investors who need to make informed decisions about Google Messaging and Collaboration solutions.

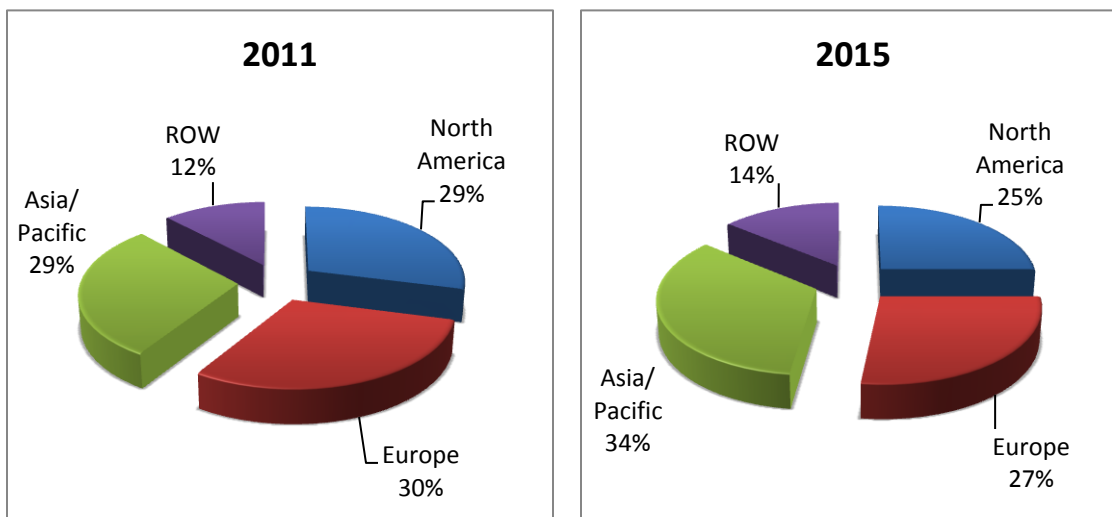


Figure 1: Google Gmail Installed Base by Region, 2011 vs. 2015

Headquarters: 1900 Embarcadero Road, Suite 206  
Palo Alto, CA 94303  
phone: (650) 322-8059  
fax: (650) 352-2201

Europe: 29E Fitzjohns Avenue  
London NW3 5JY, UK  
phone: +44 (0) 20 7794-4298  
fax: +44 (0) 20 7431-9375



## TABLE OF CONTENTS

<b>SCOPE .....</b>	<b>6</b>
<b>METHODOLOGY.....</b>	<b>7</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>8</b>
<b>CHAPTER 1: GOOGLE EMAIL AND COLLABORATION MARKET DATA .....</b>	<b>10</b>
1.1 GOOGLE SERVICES .....	11
1.2 GOOGLE COMPETITORS .....	13
1.3 EMERGING GOOGLE SERVICES .....	15
1.4 GOOGLE GMAIL .....	17
1.4.1 GMAIL INSTALLED BASE.....	18
1.4.1.1 GMAIL INSTALLED BASE BY REGION .....	19
1.5 GOOGLE APPS .....	22
1.5.1 GOOGLE APPS INSTALLED BASE.....	25
1.5.2 GOOGLE APPS INSTALLED BASE BY TYPE OF EDITION.....	29
1.5.3 GOOGLE APPS INSTALLED BASE BY REGION .....	31
1.5.4 GOOGLE APPS INSTALLED BASE BY BUSINESS SIZE .....	32
1.6 GOOGLE MESSAGE SECURITY .....	35
1.6.1 GOOGLE MESSAGE SECURITY INSTALLED BASE .....	36
1.6.1.1 GOOGLE MESSAGE SECURITY INSTALLED BASE BY REGION.....	38
1.6.1.2 GOOGLE MESSAGE SECURITY INSTALLED BASE BY BUSINESS SIZE.....	40
1.6.2 GOOGLE MESSAGE SECURITY FOR SERVICE PROVIDERS INSTALLED BASE.....	43
1.7 GOOGLE MESSAGE DISCOVERY .....	46
1.7.1 GOOGLE MESSAGE DISCOVERY INSTALLED BASE.....	47
1.7.1.1 GOOGLE MESSAGE DISCOVERY INSTALLED BASE BY REGION .....	50
1.7.1.2 GOOGLE MESSAGE DISCOVERY INSTALLED BASE BY BUSINESS SIZE .....	51
1.8 GOOGLE TALK .....	54
1.8.1 GOOGLE TALK INSTALLED BASE.....	55
1.8.1.1 GOOGLE TALK INSTALLED BASE BY REGION .....	56
1.9 GOOGLE VOICE .....	58
1.9.1 GOOGLE VOICE INSTALLED BASE.....	58
1.9.2 GOOGLE VOICE INSTALLED BASE BY REGION .....	60
1.10 GOOGLE ANDROID .....	62
1.10.1 GOOGLE ANDROID OS INSTALLED BASE .....	63
1.10.1.1 GOOGLE ANDROID OS INSTALLED BASE BY REGION.....	65
<b>CHAPTER 2: GOOGLE EMAIL &amp; COLLABORATION SOLUTIONS OVERVIEW.....</b>	<b>67</b>
2.1 GOOGLE CONSUMER EMAIL AND COLLABORATION SOLUTIONS .....	68
2.1.1 GMAIL .....	68
2.1.2 GOOGLE TALK .....	69
2.1.3 GOOGLE VOICE.....	70
2.1.4 ANDROID MOBILE OS.....	71
2.1.5 GOOGLE BUZZ .....	72
2.2 GOOGLE CONSUMER SOLUTIONS STRENGTHS AND WEAKNESSES.....	72

2.2.1 STRENGTHS .....	72
2.2.2 WEAKNESSES.....	74
2.2.3 GOOGLE CONSUMER SOLUTIONS ANALYSIS .....	74
2.3 GOOGLE BUSINESS SOLUTIONS .....	77
2.3.1 GOOGLE APPS.....	77
2.3.2 GOOGLE APPS FOR BUSINESS .....	78
2.3.3 GOOGLE APPS FOR GOVERNMENT.....	79
2.3.4 GOOGLE APPS FOR EDUCATION.....	80
2.3.5 GOOGLE POSTINI SERVICES.....	80
2.3.6 PRICING.....	81
2.4 GOOGLE APPS STRENGTHS AND WEAKNESSES .....	82
2.4.1 STRENGTHS .....	82
2.4.2 WEAKNESSES.....	84
2.4.3 GOOGLE APPS ANALYSIS.....	85

## LIST OF FIGURES

<i>FIGURE 1: GOOGLE GMAIL INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	9
<i>FIGURE 2: PENETRATION OF GMAIL vs. ISP/WEBMAIL MAILBOXES, 2011 - 2015</i> .....	19
<i>FIGURE 3: GOOGLE GMAIL INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	21
<i>FIGURE 4: PENETRATION OF GOOGLE APPS vs. BUSINESS HOSTED EMAIL MAILBOXES, 2011 - 2015</i> .....	26
<i>FIGURE 5: GOOGLE APPS vs. HOSTED BUSINESS EMAIL REVENUES, 2011 - 2015</i> .....	27
<i>FIGURE 6: WORLDWIDE GOOGLE APPS REVENUE FORECAST, 2011 - 2015</i> .....	28
<i>FIGURE 7: GOOGLE APPS INSTALLED BASE BY EDITION, 2011 vs. 2015</i> .....	30
<i>FIGURE 8: GOOGLE APPS INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	32
<i>FIGURE 9: GOOGLE APPS INSTALLED BASE BY BUSINESS SIZE, 2011 vs. 2015</i> .....	34
<i>FIGURE 10: PENETRATION OF GOOGLE MESSAGE SECURITY vs. HOSTED EMAIL SECURITY, 2011 - 2015</i> .....	37
<i>FIGURE 11: WORLDWIDE GOOGLE MESSAGE SECURITY REVENUES, 2011 - 2015</i> .....	38
<i>FIGURE 12: GOOGLE MESSAGE SECURITY INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	40
<i>FIGURE 13: GOOGLE MESSAGE SECURITY INSTALLED BASE BY BUSINESS SIZE, 2011 vs. 2015</i> .....	42
<i>FIGURE 14: PENETRATION OF GOOGLE MESSAGE SECURITY vs. EMAIL SECURITY FOR SERVICE PROVIDERS, 2011 - 2015</i> .....	44
<i>FIGURE 15: PENETRATION OF GOOGLE MESSAGE SECURITY vs. EMAIL SECURITY FOR SERVICE PROVIDERS REVENUES, 2011 - 2015</i> .....	45
<i>FIGURE 16: PENETRATION OF GOOGLE MESSAGE DISCOVERY vs. HOSTED EMAIL ARCHIVING, 2011 - 2015</i> .....	48
<i>FIGURE 17: WORLDWIDE GOOGLE MESSAGE DISCOVERY REVENUES, 2011 - 2015</i> .....	49
<i>FIGURE 18: GOOGLE MESSAGE DISCOVERY INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	51
<i>FIGURE 19: GOOGLE MESSAGE DISCOVERY INSTALLED BASE BY BUSINESS SIZE, 2011 vs. 2015</i> .....	53
<i>FIGURE 20: WORLDWIDE GOOGLE TALK vs. PUBLIC IM USERS, 2011 - 2015</i> .....	56
<i>FIGURE 21: GOOGLE TALK USER INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	57
<i>FIGURE 22: GOOGLE VOICE USER INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	61
<i>FIGURE 23: GOOGLE ANDROID OS IB vs. MOBILE OS PLATFORMS IB, 2011 - 2015</i> .....	64
<i>FIGURE 24: GOOGLE ANDROID INSTALLED BASE BY REGION, 2011 vs. 2015</i> .....	66

## LIST OF TABLES

TABLE 1: WORLDWIDE GOOGLE GMAIL MAILBOX FORECAST, 2011 - 2015 .....	18
TABLE 2: GOOGLE GMAIL INSTALLED BASE - BREAKOUT BY REGION, 2011 - 2015.....	20
TABLE 3: UPDATED GOOGLE APPS PRODUCT NAMES .....	23
TABLE 4: WORLDWIDE GOOGLE APPS MAILBOX FORECAST 2011 - 2015.....	25
TABLE 5: WORLDWIDE GOOGLE APPS REVENUE FORECAST (\$M), 2011 – 2015.....	27
TABLE 6: WORLDWIDE GOOGLE APPS MAILBOXES - BREAKOUT BY EDITION, 2011 - 2015 ....	30
TABLE 7: GOOGLE APPS INSTALLED BASE – BREAKOUT BY REGION, 2011 – 2015.....	32
TABLE 8: WORLDWIDE GOOGLE APPS MAILBOXES - BREAKOUT BY BUSINESS SIZE, 2011 - 2015 .....	33
TABLE 9: WORLDWIDE GOOGLE MESSAGE SECURITY FORECAST, 2011 - 2015.....	36
TABLE 10: WORLDWIDE GOOGLE MESSAGE SECURITY REVENUE FORECAST (\$M), 2011 – 2015 .....	37
TABLE 11: GOOGLE MESSAGE SECURITY INSTALLED BASE – BREAKOUT BY REGION, 2011 – 2015.....	39
TABLE 12: WORLDWIDE GOOGLE MESSAGE SECURITY USERS - BREAKOUT BY BUSINESS SIZE, 2011 - 2015.....	41
TABLE 13: WORLDWIDE GOOGLE MESSAGE SECURITY FORECAST, 2011 – 2015.....	43
TABLE 14: WORLDWIDE GOOGLE MESSAGE SECURITY REVENUE FORECAST (\$M), 2011 – 2015 .....	45
TABLE 15: WORLDWIDE GOOGLE MESSAGE DISCOVERY FORECAST 2011 - 2015.....	47
TABLE 16: WORLDWIDE GOOGLE MESSAGE DISCOVERY REVENUE FORECAST (\$M), 2011 – 2015.....	49
TABLE 17: GOOGLE MESSAGE DISCOVERY INSTALLED BASE – BREAKOUT BY REGION, 2011 – 2015.....	50
TABLE 18: WORLDWIDE GOOGLE MESSAGE DISCOVERY USERS - BREAKOUT BY BUSINESS SIZE, 2011 - 2015.....	52
TABLE 19: WORLDWIDE GOOGLE TALK INSTALLED BASE FORECAST, 2011 - 2015.....	55
TABLE 20: GOOGLE TALK USER INSTALLED BASE - BREAKOUT BY REGION, 2011 - 2015.....	57
TABLE 21: WORLDWIDE GOOGLE VOICE USER FORECAST, 2011 - 2015.....	59
TABLE 22: GOOGLE VOICE USER INSTALLED BASE BREAKOUT BY REGION, 2011 - 2015 .....	60
TABLE 23: WORLDWIDE GOOGLE ANDROID OS INSTALLED BASE FORECAST, 2011 - 2015....	63
TABLE 24: GOOGLE ANDROID OS INSTALLED BASE - BREAKOUT BY REGION, 2011 – 2015 ...	65