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Google Email and Collaboration Market Analysis, 2011-2015

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SCOPE

This study looks at the penetration of Google messaging and collaboration solutions in both the enterprise and consumer markets. For all solutions, this study provides extensive data regarding installed base and four year forecasts, as well as breakouts by business size, region, and version as applicable. This report also examines the features, strategies, strengths and weaknesses of Google's leading messaging and collaboration offerings.

All market numbers, such as market size, forecasts, installed base, revenue information, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All revenue 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

- This study provides an analysis of Google’s messaging and collaboration services aimed at both consumer and business users. The study provides detailed market share, four-year forecasts, and breakout by region, version and business size as applicable for the following services:
 - **Google Gmail** – Google Gmail is a free, ad-based webmail service primarily aimed at the consumer market. Google released Gmail to the general public in 2007. Gmail tightly integrates with several other Google services such as Google Talk, Google Voice, and Google Buzz. Google’s mobile OS, Android, also tightly integrates the Gmail service into its mobile software, while also supporting wireless email on Windows Mobile, iPhone, BlackBerry, and other mobile devices.
 - **Google Apps** – The Google Apps platform is a web-based messaging and collaboration suite aimed mainly at businesses, and includes a broad range of business-oriented web applications.
 - **Google Message Security** – Google Message Security provides email security services powered by Google’s wholly owned subsidiary, Postini. The services protect against spam and messaging threats. Google’s security services are available as stand alone solutions for use with existing email servers and are also integrated into Google Apps for Business for use with Gmail.
 - **Google Message Discovery** – Google Message Discovery archiving services also powered by Postini. Archiving is available as a stand alone service for use with existing email servers, and is also integrated into Google Apps for Business for use with Gmail.
 - **Google Talk** – Google Talk is integrated into the Gmail client, enabling users to send and receive Instant Messages (IM) and SMS text messages. Google Talk is also available as a downloadable desktop client.
 - **Google Voice** – Google Voice is a web-based telecommunications and voicemail service. Google Voice provides PC to PC, PC to phone, and phone to PC voice and/or video calling anywhere around the world.

- **Google Android** – Google’s Android is an open, highly customizable mobile OS. Google has published Android’s source code in an effort to open up the mobile development process to hardware manufacturers, and application developers.
- Figure 1, shows the regional distribution of Google Gmail mailboxes in 2011, and in 2015. Google Gmail mailboxes are expected to grow from 236 million by year-end 2011 to 453 million in 2015.

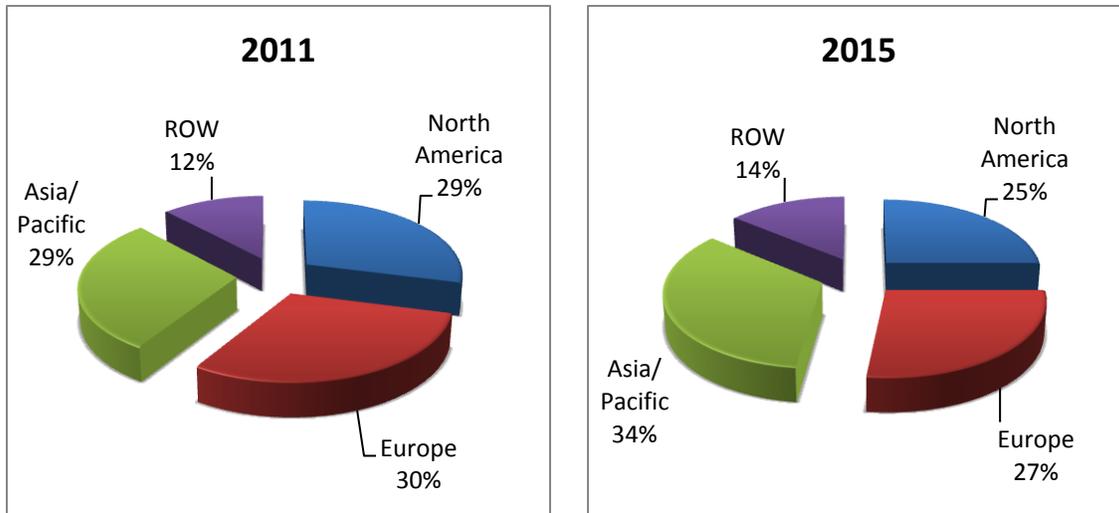


Figure 1: Google Gmail Installed Base by Region, 2011 vs. 2015

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