



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

1900 EMBARCADERO ROAD, SUITE 206. • PALO ALTO, CA 94303

TEL. 650 322-8059 • FAX 650 322-8061

Mobile Email Market, 2011-2015

Editor: Sara Radicati, Ph.D; Principal Analyst: Todd Yamasaki

SCOPE

This study covers the Worldwide Mobile Email market in 2011, and its expected growth over the next four years. It encompasses the market for mobile 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 2011 to 2015.

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. All market numbers represent worldwide figures, unless otherwise indicated.

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.

EUROPE: 29E FITZJOHNS AVE • LONDON NW3 5JY • TEL. +44 (0)207 794 4298 •
FAX. +44 (0)207 431 9375 e-mail: sara@radicati.com <http://www.radicati.com>

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

- Mobile Email is one of the hottest technology markets today and is set to triple in users over the next four years. Email access is currently one of the most widely used apps on users' smartphones and tablets. Growth is expected to increase rapidly within all regions worldwide as the cost of mobile devices including phones and tablets continue to decrease.
- Mobile email is unique market which involves a diverse collection of vendors, device manufacturers, carriers, and developers, which come together to deliver seamless email connectivity between user inboxes and mobile devices.
- This report focuses on three segments of the Mobile Email market:
 - **Enterprise Mobile Email Solutions:** This segment includes Mobile Email solutions which typically offer robust security policies, comprehensive management controls, sophisticated encryption for data in transit, as well as many other features intended to meet the strict security and reliability requirements of business users.
 - **Consumer Mobile Email Solutions:** This segment includes Mobile Email solutions which provide push email functionality to users of ISP/Webmail services. These solutions are generally targeted at the prosumer/consumer market.
 - **Mobile OS Platforms:** This segment includes the software that enables mobile email on smartphones, tablets, and feature phones. Mobile OS vendors may develop their own device hardware, or they may license their software to other device manufacturers.

- It has become much more common for businesses to allow employees to bring in and connect their own personal devices to the company's network. While this was an idea which many businesses resisted for quite some time, technological advancements and an overwhelming push from employees has led many businesses to change their attitudes on this. Allowing employees to bring in their own personal devices also enables businesses to save on the carrier contracts and mobile device fees.
- The proliferation of personal use devices within the enterprise has brought on a new set of security and management concerns for IT staffs and administrators. Previously, managing mobile devices within a business was much simpler. There were usually one or two set devices that an employee could choose which simplified the management process and enforcement of security policies. Now, with so many devices from different manufacturers and multiple OS platforms, it has become much more challenging to set up and manage all of these devices.
- As mobile technology has advanced, so has the number of mobile email-enabled devices available to users today. A significant number of new devices have been introduced over the last year which has helped push the Mobile Email market to new heights. Mobile OS's such as Apple's iOS and Google's Android have been at the forefront of this new wave of mobile technology. Android devices, in particular, have become increasingly affordable and now many of these devices cost the same as some basic feature phones.
- On the higher-end of the mobile device spectrum, tablets have seen tremendous growth over the last year. Lead by Apple's iPad, the tablet market has seen great uptake by consumers and business users. The form factor of tablets along with their familiar OS's has helped the device become quite popular. Businesses are still trying to figure out how exactly they can incorporate tablets alongside other mobile devices such as smartphone and laptops. We expect the growth in tablet deployments to soon mirror that of smartphones in the enterprise.

- The worldwide market for Mobile Email, including all segments, will total \$4.6 billion in 2011, and is expected to grow to \$10 billion by 2015.

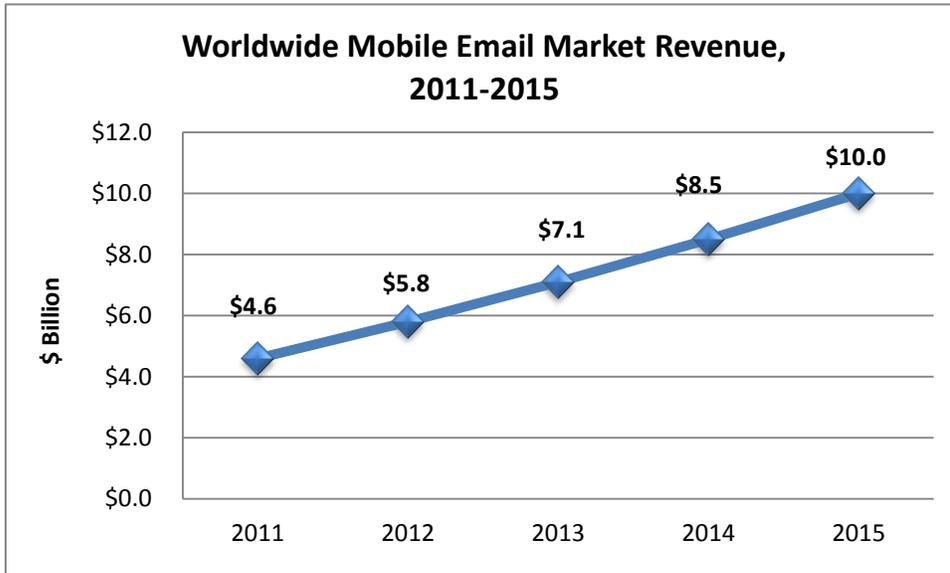


Figure 1: Worldwide Mobile Email Market Revenue, 2011 - 2015

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