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Instant Messaging Market, 2011-2015

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SCOPE

This study examines the market for Instant Messaging (IM) solutions from 2011 to 2015. It provides extensive data regarding current installed base as well as four year forecasts, broken out by region, business size, and other variables. This report also examines IM solution features, business strategies, plus product strengths and weaknesses.

All market figures, such as market size, forecasts, installed bases, and any financial information presented in this study represent worldwide figures, unless otherwise indicated. All pricing numbers are expressed in \$USD.

METHODOLOGY

The data and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of data collected from vendors and corporate enterprises via interviews and surveys.

Secondary sources have been consulted to cross-check the data collected. These include company annual reports and market size information from various related market segments of the technology industry.

The focus of this research was worldwide.

EXECUTIVE SUMMARY

- This study looks at the Instant Messaging market as comprising four different market segments:
 - *Public IM networks* – This segment includes IM services aimed at consumers. Public IM networks are typically free to use, and also offer more features that go beyond simple instant messaging. Key vendors in this segment include: *AOL, Facebook, Google, Microsoft, Skype, Tencent, Yahoo!*, and others.
 - *Enterprise IM platforms* – This segment includes IM services aimed at business users that include rich collaboration features, enhanced security, and deep integration with other applications, such as Unified Communications, Messaging and Collaboration platforms, and more. Key vendors of this segment include: *Cisco, IBM, Microsoft, Novell*, and others.
 - *IM Management and Security vendors* – This segment includes security and management solutions that protect IM networks from external threats, and manage IM usage within the corporate network to prevent data

leakage and maintain worker productivity. Key vendors of this segment include: *Actiance*, *Global Relay*, *Symantec*, and others.

- *IM Aggregators* – This segment includes vendors that connect to multiple IM networks through a single unified client. These services allow users to communicate with their contacts on different IM networks, all from the IM Aggregator client. Key vendors of this segment include: *eBuddy*, *Meebo*, *Pidgin*, *Trillian*, and others.
- All segments of the IM market are continuing to grow at a healthy rate even as competing services such as social networking, webmail, and mobile services are growing in popularity.
- IM networks are adding new features, such as group video chat, that are blurring the line even further between IM and unified communications (UC). It is difficult to find an IM solution that does not include some level of UC capabilities.
- The integration of social networks with IM solutions is making the IM experience much more personalized. Both consumers and business users can deeply personalize their IM experience with Facebook, Twitter, and LinkedIn updates.
- IM is no longer limited to stationary use at a personal computer. It is now available everywhere there is an Internet connection via smartphones, tablets, and other mobile devices. Native mobile apps and mobile Web browsers have extended IM capabilities to a much broader audience.
- The Enterprise IM market has experienced solid growth in the last year as more businesses switch over from Public IM networks. Enterprise IM solutions have richer collaboration features and, more importantly, have better security and privacy options than those offered on Public IM networks.
- Regulatory requirements regarding the preservation of IM content have continued to increase as the use of IM in the enterprise has become more widespread. This is driving growth in the IM Management and Security segment as organizations need to meet compliance requirements.

- Worldwide IM accounts are expected to grow from over 2.5 billion in 2011 to more than 3.3 billion by 2015, representing an average growth rate of nearly 7%. Table 1, shows the growth in the number of worldwide IM accounts from 2011 to 2015. Worldwide IM accounts shown below include Public IM and Enterprise IM.

| | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------------------------------|-------|-------|-------|-------|-------|
| Worldwide IM Accounts (M) | 2,575 | 2,772 | 2,960 | 3,142 | 3,318 |
| % Change | | 8% | 7% | 6% | 6% |

Table 1: Worldwide IM Accounts, 2011-2015

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