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Instant Messaging Market, 2012-2016

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SCOPE

This study examines the market for Instant Messaging (IM) solutions from 2012 to 2016. 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.

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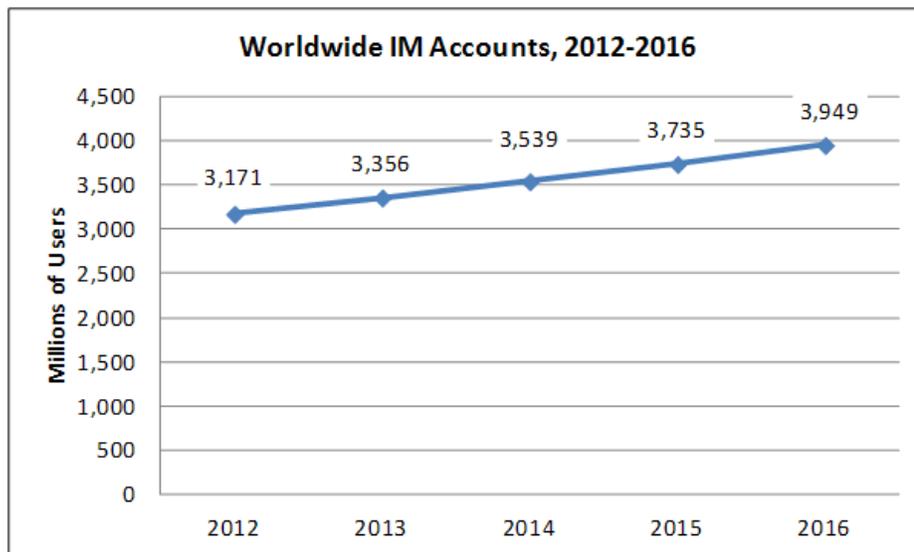
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EXECUTIVE SUMMARY

- This study looks at the Instant Messaging market as comprising four different market segments:
 - **Public IM Networks** – provide IM services primarily for the consumer market, but are also often used by business users. Key Public IM vendors include: *AOL, Facebook, Google, Microsoft, Skype, Tencent, Yahoo!*, and others.
 - **Enterprise IM Platforms** – which are deployed by organizations of all sizes, include improved security and privacy features that cannot typically be attained through Public IM networks. Key Enterprise IM vendors include: *Bloomberg, Cisco, Global Relay, Good Technology, IBM, Microsoft, Novell, and Thomson Reuters*, and others.
 - **IM Management and Security Vendors** – offer solutions that provide end-to-end security for all IM activity, integrate with Public IM services and Enterprise IM platforms, and provide granular controls for IT professionals to effectively monitor and manage users within the IM network. Key IM Management and Security vendors include: *Actiance, Symantec*, and others.
 - **Mobile IM** – refers to IM services that are developed specifically for use on mobile devices, and typically serve as alternatives to SMS messaging. The Mobile IM segment includes: *Apple iMessage, BlackBerry Messenger, WhatsApp Messenger*, and others.
- Over the past year, Public IM networks have added greater federation with other IM networks, more robust mobile capabilities, and integration with various popular social networks, such as Facebook and Twitter. While this greatly enriches the IM experience for users, it often also leads to an overlap in functionality between IM and social media networks.

- The Enterprise IM market has also responded to the growth in popularity of social networking by creating a much more social experience for users. For example, greater interoperability with various Public IM networks, such as AOL AIM, Google Talk, and others, allows organizations to communicate with all of their contacts, many of which reside on Public IM networks. These social features are also bringing a sense of collaboration to IM to create an experience that more closely aligns with unified communications.
- IM Management & Security vendors are evolving their business model. In the past year, Symantec and Global Relay have released Enterprise IM platforms that provide a secure communications pipe to customers, rather than simply being an add-on to existing Enterprise IM platforms.
- Today, an estimated 30% of worldwide mobile device users are utilizing various Mobile IM services, which typically include a number of features that cater to a mobile-centric user base. Users are becoming much more reliant on their mobile devices, and Mobile IM vendors are enabling advanced messaging and communication capabilities that are turning devices into mobile computers.
- Worldwide IM accounts are expected to grow from over 3.1 billion in 2012 to over 3.9 billion by year-end 2016, representing an average growth rate of about 6%. Figure 1, shows the total growth of Public IM, Enterprise IM, and Mobile IM accounts worldwide from 2012 to 2016.



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