



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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Instant Messaging Market, 2015-2019

SCOPE

This study examines the market for Instant Messaging (IM) and Mobile Messaging (also referred to as Mobile IM or Mobile Chat) solutions, from 2015 to 2019. 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 provides an overview of leading IM and Mobile Messaging vendor offerings.

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.

Regional breakouts are provided for: North America, Europe, Asia Pacific, and Rest of World. This report does not contain country breakouts but these may be obtained from The Radicati Group at an extra charge.

Installed base numbers throughout this report represent *active* accounts, which have been accessed at least once within the last month.

METHODOLOGY

The information and analysis in this report are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

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- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- This study looks at the Instant Messaging market as comprising four different 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: *Facebook, Google, Microsoft, Tencent, Yahoo!*, and others.
 - **Enterprise IM Platforms** – are IM communication platforms deployed by organizations of all sizes, which provide security and privacy features that cannot typically be attained through Public IM networks. Key Enterprise IM vendors include: *Bloomberg, Cisco, IBM, Microsoft, Novell, 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, Good Technology*, and others.

- **Mobile Messaging (also referred to as Mobile IM or Mobile Chat)** – 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, Facebook WhatsApp, Kik Interactive*, and others.
- Instant Messaging continues to see strong growth across all four segments of the market in 2015, particularly the Mobile Messaging segment, which is fueled by strong adoption of mobile technology. Instant Messaging is generally free, or inexpensive, it is immediate, easy to use, and pervasive on a wide range of different platforms and devices.
- IM vendors are increasingly blurring the boundaries between IM, social networking and unified communications, by implementing features, which transform IM into a central hub for communication and social activity. Almost all IM solutions include some degree of interoperability or federation with social networks, such as Facebook, Twitter, and LinkedIn. Users are able to access these social networks without leaving the IM interface, and, in some cases, can post status updates and more.
- Moving beyond text-only communication, all Public IM networks now offer audio/visual forms of communication, not only through emoticons, stickers, picture and video sharing, but also through live video and voice. Public IM networks are starting to emulate unified communications services.
- Enterprise IM networks also continue to show steady adoption, as more organizations opt for enterprise-grade functionality and security that cannot be attained with Public IM solutions.
- Mobile Messaging (also known as Mobile IM or Mobile Chat) has emerged in recent years as a very popular form of mobile-to-mobile communication, which has shown explosive growth. While the boundaries between traditional desktop IM and Mobile Messaging are blurring due to increased interoperability, a significant user base still remains on mobile-only IM networks such as WhatsApp, WeChat and many others.

As the worldwide population of smartphone devices continues to increase so does the use of Mobile Messaging.

- Worldwide IM user accounts are expected to grow from over 3.2 billion in 2015 to over 3.8 billion by year-end 2019, representing an average annual growth rate of about 4%. Figure 1, shows the total growth of IM accounts worldwide comprising all segments: Public IM and Enterprise IM accounts from 2015 to 2019. Mobile Messaging accounts are not included in these numbers and are treated separately in this report.

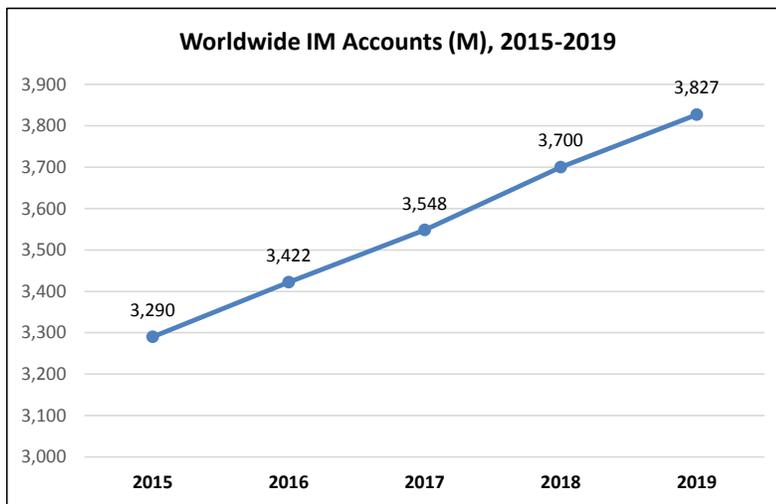


Figure 1: Worldwide IM Accounts*, 2015-2019

(does not include Mobile Messaging)*

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