



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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## ***Instant Messaging Market, 2017-2021***

### **SCOPE**

This study examines the market for Instant Messaging (IM) and Mobile Messaging (also referred to as Mobile IM or Mobile Chat), from 2017 to 2021. It provides extensive data regarding current users and accounts, 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.

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## **METHODOLOGY**

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

- 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.

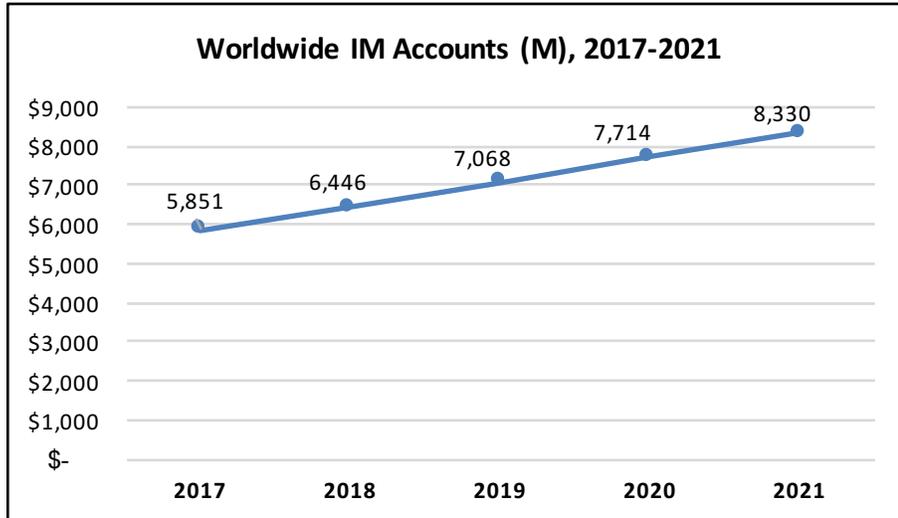
Our research processes and methodologies are proprietary and confidential.

## **EXECUTIVE SUMMARY**

- Instant Messaging (IM), often also referred to as “chat”, offers real-time communication between two or more users. IM solutions, today, include group chat, conferencing, voice, video, and much more. As this trend continues, it blurs the line

between IM and unified communications. IM is highly popular with both consumer and enterprise users.

- Mobile Messaging (also known as Mobile IM or Mobile Chat), defined as strictly mobile-to-mobile messaging, has emerged in recent years as a very popular form of communication, with exponential growth. While the boundaries between traditional desktop IM and Mobile Messaging are blurring due to increased interoperability, a significant user base still relies mainly on mobile IM networks such as WhatsApp, WeChat and many others.
- IM solutions have embraced integration with social networks by allowing users to post status updates directly from IM interfaces. In addition, many social networks embed their own IM services, resulting in a richer communication experience.
- Federation and interoperability between IM networks, which would allow users to access multiple networks through a single account, continues to lag. Therefore, the average user tends to have multiple IM accounts in order to communicate with contacts on different networks.
- IM also continues to see strong adoption in the workplace due to its immediacy and ease of use. Enterprise IM solutions, which offer enterprise-grade functionality and security as well as integration with conferencing and collaboration platforms, are gaining penetration with business organizations of all sizes.
- Worldwide IM user accounts are expected to grow from over 5.8 billion in 2017 to over 8.3 billion by year-end 2021, representing an average annual growth rate of 9%. Figure 1, shows the total growth of IM accounts worldwide comprising both Consumer and Enterprise IM accounts from 2017 to 2021. Mobile Messaging accounts are not included in these numbers and are treated separately in this report.



**Figure 1: Worldwide IM Accounts\*, 2017-2021**

*(\* does not include Mobile Messaging)*

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