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## ***Cloud Business Email Market, 2017-2021***

### **SCOPE**

This study provides an analysis of the Cloud Business Email market in 2017, and its potential growth over the next four years. It provides detailed market trends, market share, market size, forecasts, and an analysis of key Cloud Business Email providers.

This study segments the market as follows:

- **Cloud Business Email** are cloud-based email services targeted at business organizations of all sizes, for use in a multi-tenant or dedicated (i.e. private cloud) environment.
  - **Hosted Microsoft Exchange Partners** are a sub-segment of Cloud Business Email providers that offer Hosted Microsoft Exchange services to their subscribers.
  - **G Suite** (formerly Google Apps for Work) is its own segment and is included in this report with forecasts and detailed breakouts.

Revenues, pricing, and all currency figures presented in this study are expressed in \$USD, unless otherwise indicated.

All market numbers represent worldwide figures, unless otherwise indicated.

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Installed base mailbox figures represent *active* mailboxes, which we define as mailboxes that are used at least once every three months. Email aliases are not counted as a separate unit.

*Note: The terms “installed base,” “accounts,” “seats,” and “mailboxes” are used interchangeably in this report.*

## **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.

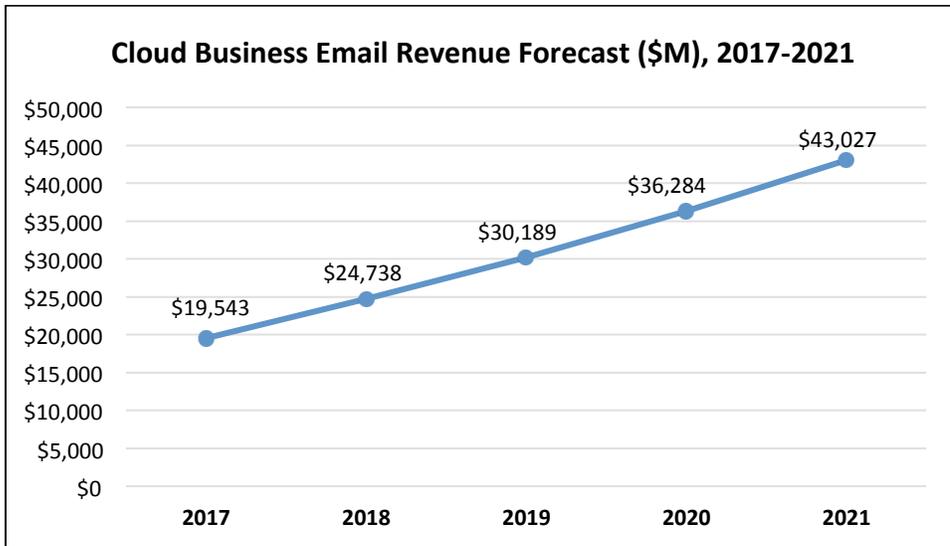
Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

## **EXECUTIVE SUMMARY**

- Cloud Business Email solutions are seeing strong worldwide adoption, as mid-size and large organizations are increasingly moving to cloud email. Key drivers for organizations of all sizes, besides cost and ease of administration, include:

- Cloud email services are a simple way for businesses to connect geographically dispersed work teams or regional offices with a common infrastructure.
  - Organizations often have a complex mix of various email systems obtained via acquisitions and mergers. Sometimes, the best way to unify these solutions is through a cloud solution. This can also help simplify existing licensing and hosting contracts.
  - Some organizations are adopting a cloud email service for redundancy as a secondary, back-up email solution in case their main on-premises email system fails.
  - Cloud email services give organizations the option to extend email and related services to non-office workers that have traditionally not had access to email in the past, such as retail or factory workers. Low price points and the ease of deployment make serving these employees feasible.
- Many email vendors offer hybrid solutions, which allow customers to deploy a mix of on-premises and cloud-based mailboxes. Hybrid solutions enable organizations to migrate to the cloud at their own pace; however, they are usually more complex to manage. Adoption of hybrid deployments has been mixed, some organizations view it as a useful stepping stone, while others prefer to keep all their mailboxes either on-premises or in the cloud.
  - Figure 1, shows the worldwide revenue forecast for Cloud Business mailboxes, from 2017 to 2021. The Cloud Business Email market is expected to generate over \$19.5 billion in revenues in 2017 and grow to over \$43.0 billion by 2021.



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