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Email Market, 2017-2021

SCOPE

This study provides an analysis of the 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 vendors and cloud providers.

This study segments the Email market as follows:

- **Enterprise Messaging Platforms** - on-premises email and collaboration platforms that cater to the needs organizations of all sizes.
- **Messaging Platforms for Service Providers** - messaging platforms deployed by business-oriented or consumer-oriented service providers to provide email services to their subscribers.
- **Cloud Business Email** - cloud-based email services targeted at business organizations of all sizes for use in a multi-tenant or dedicated environment.
- **Email Clients** – desktop or web-based interfaces for accessing and working with email.
- **Consumer Email** - cloud-based email solutions targeted at consumers.

All market numbers, such as market size, forecasts, revenue information, and any financial information presented in this study represent worldwide figures, geographical

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breakouts are also provided where appropriate. All revenue numbers are expressed in \$USD.

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.

Throughout this report the terms email and messaging are used interchangeably.

This study does not include data on the number of mobile email users.

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

- Email continues to show strong growth worldwide, in terms of both users and revenues. Table 1, shows the growth forecast for email users and revenues from 2017 to 2021.
 - Today, there are over 3.7 billion email users worldwide, and this figure is expected to grow to over 4.1 billion by year-end 2021.
 - Revenues for all segments of the Email Market combined are expected to total over \$23.8 billion in 2017, and will grow to over \$46.8 billion by year-end 2021, an average annual growth rate of 18%. Revenue growth is driven mainly by the migration of on-premises mailboxes to cloud mailboxes.

Worldwide Email Market Forecast	2017	2018	2019	2020	2021
Worldwide Email Users (M)	3,718	3,823	3,930	4,037	4,147
<i>% change</i>		3%	3%	3%	3%
Worldwide Email Market Revenues (\$M)	\$23,881	\$29,028	\$34,357	\$40,256	\$46,814
<i>% change</i>		22%	18%	17%	16%

Table 1: Worldwide Email Market Forecast, 2017-2021

- This report looks at the Email Market as comprising five segments:
 - **Enterprise Messaging Platforms** – on-premises email and collaboration platforms from vendors such as: *IBM, Microsoft*, and others.
 - **Messaging Platforms for Service Providers** – messaging platforms deployed by service providers to offer email to business or consumer subscribers. Leading platforms include: *Open-Xchange, Oracle, Synchronoss Messaging, Synacor (Zimbra)* and many others.
 - **Cloud Business Email** – are multi-tenant or dedicated hosted services that provide business email and collaboration services to organizations of all sizes. Leading providers include: *Intermedia, Google, Microsoft*, and many others.

- **Email Clients** – desktop or web-based interfaces for accessing and working with email, such as *IBM Notes*, *Microsoft Outlook*, and others.
- **Consumer Email** – email services geared to consumers. Leading consumer email services, include: *Google Gmail*, *Microsoft Outlook.com*, *Yahoo! Mail*, and many others.
- On-premises Enterprise Messaging Platforms are increasingly yielding market share to Cloud Business Email solutions. Cost, ease of use and low administrative overhead are the main drivers for cloud email adoption. However, organizations still voice concerns over the security and privacy of cloud email solutions.
- Consumer email use continues to grow worldwide, as more people gain access to the Internet on a worldwide basis. Email remains a key component of the online experience, as email accounts are required for any form of online activity ranging from signing up to social networking sites (e.g. Facebook and Twitter), accessing chat or instant messaging services, online shopping or any other type of online activity.
- The total worldwide email traffic, including both Business and Consumer emails, is estimated to be over 269 billion emails/day by year-end 2017, growing to over 319.6 billion emails/day by the end of 2021.

Daily Email Traffic	2017	2018	2019	2020	2021
Total Worldwide Emails Per Day (B)	269.0	281.1	293.6	306.4	319.6
<i>% Change</i>		4%	4%	4%	4%

Table 2: Worldwide Daily Email Traffic, 2017-2020

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