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Cloud Business Email Market, 2018-2022

SCOPE

This study provides an analysis of the Cloud Business Email market in 2018, 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 and collaboration 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.
 - **Google G Suite** 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.

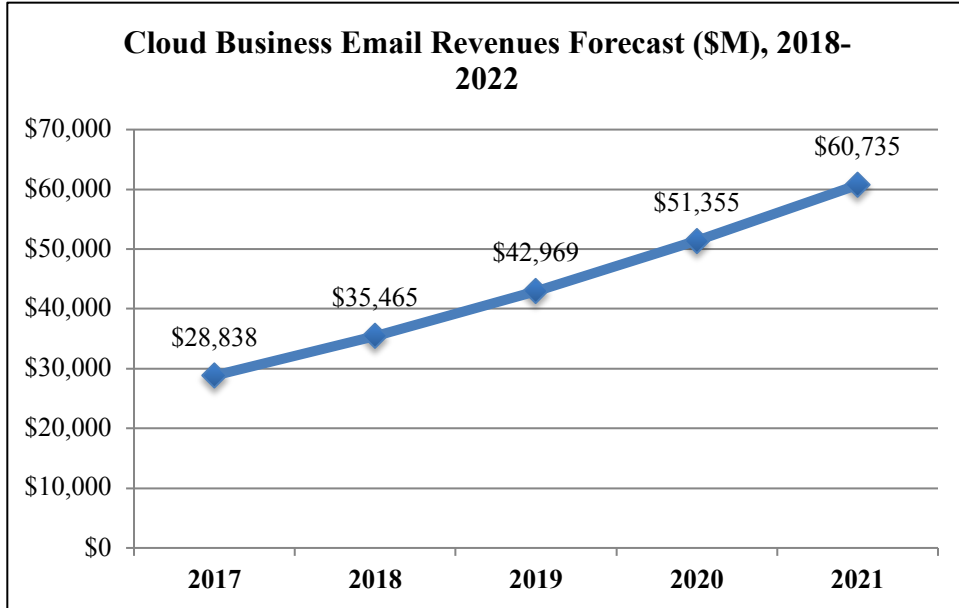
Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- The Business Email market, defined as email and collaboration, continues to see rapid growth on a worldwide basis. While social networks, Instant Messaging (IM), chat, web conferencing and other methods of communication are increasingly being used

by businesses, email remains the most pervasive form of business communication for organizations of all sizes.

- Business email and collaboration is rapidly shifting from on-premises deployments to the cloud. By the end of 2022, Cloud Business Email accounts are expected to account for 87% of all Business Email accounts. SMBs are no longer the main adopters of Cloud Business Email solutions, increasingly organizations of all sizes across all verticals are also moving to the cloud.
- Cloud Business Email Providers offer cloud-based email and collaboration services that provide feature-rich services to organizations of all sizes. These services typically include contact management, calendar/scheduling, task management, security (anti-virus, anti-spam, anti-phishing and more), online storage, document editing and collaboration, unified communication, instant messaging and/or chat, social networking integration, and more. Cloud Business email and collaboration solutions are available as either multi-tenant solutions (i.e. Public Cloud), hosted in the provider's own data centers, or as dedicated cloud deployments (i.e. Private Cloud), which deliver a more customized customer experience.
- There is a strong increase in the adoption of full-featured cloud business suites, which offer a wide range of business collaboration services beyond email. Google G Suite, Microsoft Office 365, and Hosted Microsoft Exchange are all seeing strong traction. Ongoing competition between Google, Microsoft and all providers continues to drive down prices. However, most of the price pressure is on basic entry packages, while premium services continue to command higher price points and generate strong revenues.
- Figure 1, shows that the worldwide Cloud Business Email market is expected to generate over \$28.8 billion in revenues in 2018, and grow to over \$60.7 billion by 2022.



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