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Cloud Business Email Market, 2019-2023

SCOPE

This study provides an analysis of the Cloud Business Email market in 2019, 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.

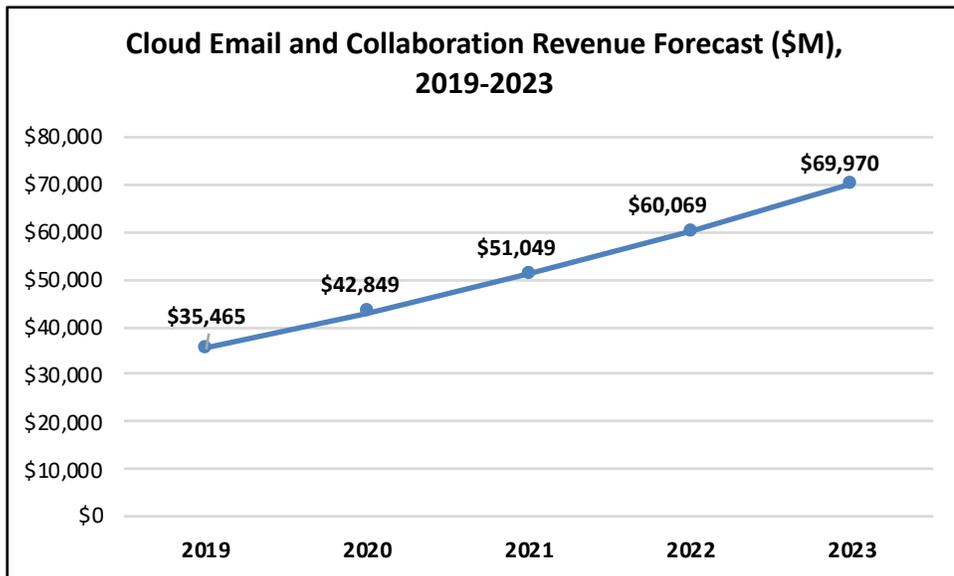
EXECUTIVE SUMMARY

- Cloud Business Email Providers offer cloud-based email and collaboration services that provide feature-rich services to organizations of all sizes. These services are typically hosted as a multi-tenant solution in the provider’s own data centers. Some

providers also offer dedicated cloud services (i.e. private cloud), which allows for a much more customizable cloud environment. We categorize among three distinct types of cloud business mailboxes:

- Cloud Microsoft Exchange mailboxes offered directly by Microsoft through Office 365 (including Education); Office 365 offered through Cloud Solution Provider (CSP) partners; and Hosted Exchange mailboxes offered through Hosting Partners.
- Google G Suite mailboxes, which bring together Gmail for email, Google Calendar for scheduling, Google Docs for productivity, Google Drive for cloud storage and synchronization, and much more. It includes G Suite for Education, G Suite for Government, and G Suite for Non-Profits.
- POP Email mailboxes are basic POP/IMAP solutions used mostly by SOHOs and SMBs. These solutions are typically very inexpensive and offer a very simplified email experience when compared with enterprise-grade cloud email solutions, such as Google G Suite or Cloud Microsoft Exchange.
- SMBs are no longer the main adopters of Cloud Business Email solutions. Increasingly mid-size and larger organizations are also rapidly 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.
- Figure 1, shows that the worldwide Cloud Business Email market will grow from over \$35.4 billion in revenues in 2019, and to over \$69.9 billion by 2022.



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