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## ***Email Market, 2019-2023***

### **SCOPE**

This study provides an analysis of the 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 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 see strong use with business and consumer users worldwide. In business, email is the basis for most “official” communication. In the consumer realm, email accounts are required for any form of online presence from signing on to social media sites, to shopping online, to gaining access to all other forms of online communication.
- Table 1, shows the growth forecast for email users and revenues from 2019 to 2023.
  - Today, there are over 3.9 billion email users worldwide, and this figure is expected to grow to over 4.3 billion by year-end 2023.
  - Revenues for all segments of the Email Market combined are expected to total over \$39.6 billion in 2019, and will grow to over \$73.3 billion by year-end 2023, an average annual growth rate of 18%. This revenue growth is driven mainly by the migration of on-premises mailboxes to cloud mailboxes.

<b>Worldwide Email Market Forecast</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
Worldwide Email Users (M)	3,930	4,037	4,147	4,258	4,371
<i>% change</i>	3%	3%	3%	3%	3%
Worldwide Email Market Revenues (\$M)	<b>\$39,633</b>	<b>\$46,821</b>	<b>\$54,833</b>	<b>\$63,601</b>	<b>\$73,317</b>
<i>% change</i>	20%	18%	17%	16%	15%

**Table 1: Worldwide Email Market Forecast, 2019-2023**

- Cloud-based email services continue to see strong growth and draw organizations away from on-premises Enterprise Platform solutions. The gap in functionality between on-premises email and cloud email solutions has not only disappeared but in most cases cloud solutions now provide more advanced functionality than on-premises solutions. The benefits of cloud adoption for email and collaboration are clear to all organizations and increasingly organizations of all sizes, across all verticals, are moving to cloud services. As a result, the Enterprise Messaging

Platforms market is rapidly trending down in terms of installed base and revenues.

- Consumer email use continues to grow, especially as more people come online on a worldwide basis. Consumer Email is typically available free of charge (i.e. ad based) from service providers, or bundled in conjunction with a broad array of connectivity services. Most Consumer Email providers offer many additional services that go beyond basic email, such as instant messaging (IM), video chat, gaming and more, to increase the draw of their services.
- The total worldwide email traffic, including both Business and Consumer emails, is estimated to be over 293 billion emails/day by year-end 2019, growing to over 347 billion emails/day by the end of 2023.

Daily Email Traffic	2019	2020	2021	2022	2023
<b>Total Worldwide Emails Per Day (B)</b>	293.6	306.4	319.6	333.2	347.3
<i>% Change</i>	4%	4%	4%	4%	4%

**Table 2: Worldwide Daily Email Traffic, 2019-2023**

***To view the complete Table of Contents for this report, visit our website at [www.radicati.com](http://www.radicati.com).***