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Cloud Business Email Market, 2020-2024

SCOPE

This study provides an analysis of the Cloud Business Email market in 2020, 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.

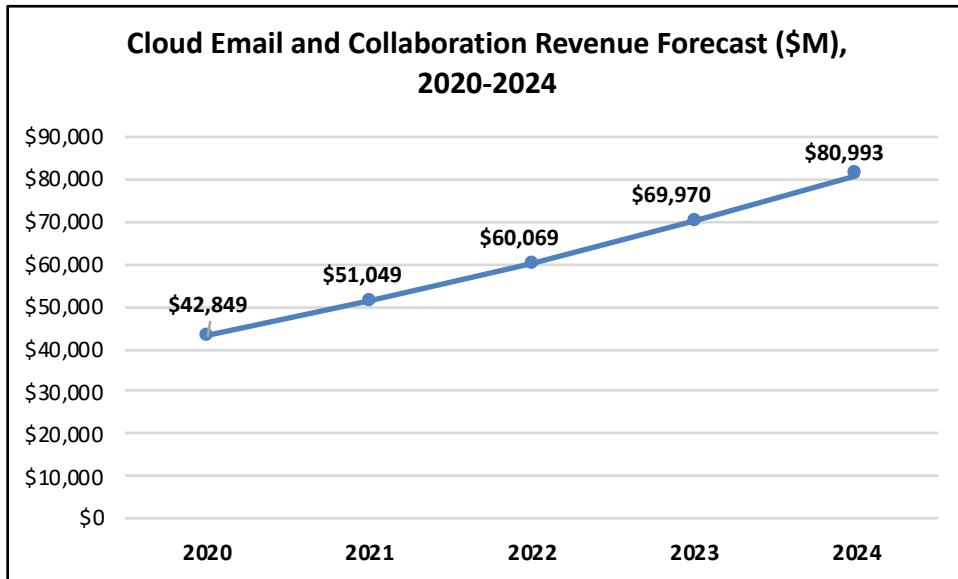
EXECUTIVE SUMMARY

- 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, or may be available as dedicated deployments, which allow for a much more customizable cloud environment.

- Cloud Business Email services deliver many important benefits to organizations, which include:
 - *No Large Upfront Investment* – cloud email and collaboration services allow organizations to avoid investing in costly hardware and software. In addition, cloud-based services typically require little to no IT resources on the customer's side, enabling organizations to reduce IT costs.
 - *Lower Deployment and Implementation Costs* – cloud email and collaboration services typically cost organizations much less per seat than on-premises deployments, where organizations incur costs for initial design, planning, set-up, deployment, and on-going upkeep.
 - *Predictable On-Going Costs* – Cloud Business Email providers typically charge customers on a user/month basis, allowing organizations to more easily keep track of the costs associated with their cloud services.
 - *Smaller Onsite IT Staffs* – Cloud Business Email providers are responsible for all of the management and maintenance of their customers' services, allowing organizations to refocus their IT staffs on other important tasks.
 - *Higher uptime* – Cloud Business Email providers are responsible for all the management and maintenance of their customers' services, allowing organizations to refocus their IT staffs on other important tasks.
 - *Timely Upgrades* – Cloud Business Email providers typically deploy patches and software updates as soon as they are made available, whereas on-premises solutions must be upgraded by the organization's IT staff, and can easily be delayed due to budget, time, and many other constraints.

- *Uniform Policies across Devices and Geographic Regions* – Cloud Business Email services allow administrators to more easily apply uniform policies to all users. This is particularly useful when managing the growing number of devices that users utilize on a daily basis. In particular, organizations with large geographically dispersed work forces can more easily apply the same policies to all users, across all locations.
- Cloud Business Email services now deliver the high level of security, scalability, and customization that was once only available in on-premises solutions. These improvements have made cloud-based solutions suitable for organizations of all sizes.
- Figure 1, shows that the worldwide Cloud Business Email market will grow from over \$42.8 billion in revenues in 2020, and to over \$80.9 billion by 2024.



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