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Email Market, 2020-2024

SCOPE

This study provides an analysis of the 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 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 remains the most ubiquitous form of communication. Email accounts are required for any form of online presence from signing on to social media sites, to shopping online, to gaining access to online portals, as well as access to all forms of online communication.
- Table 1, shows the growth forecast for email users and revenues from 2020 to 2024.
 - Today, there are over 4.0 billion email users worldwide, and this figure is expected to grow to over 4.3 billion by year-end 2024.
 - Revenues for all segments of the Email Market combined are expected to total over \$46.8 billion in 2020, and will grow to over \$84.2 billion by year-end 2024, an average annual growth rate of 16%. This revenue growth is driven mainly by the migration of on-premises mailboxes to cloud mailboxes.

Worldwide Email Market Forecast	2020	2021	2022	2023	2024
Worldwide Email Users (M)	4,037	4,147	4,258	4,371	4,481
<i>% change</i>	3%	3%	3%	3%	3%
Worldwide Email Market Revenues (\$M)	\$46,821	\$54,833	\$63,601	\$73,317	\$84,242
<i>% change</i>	18%	17%	16%	15%	15%

Table 1: Worldwide Email Market Forecast, 2020-2024

- Cloud-based email services are seeing strong adoption and are drawing organizations away from on-premises Enterprise Platform solutions. The benefits of cloud adoption for email and collaboration are clear to all organizations and many organizations of all sizes are moving to cloud services. As a result, the on-premises Enterprise Messaging Platforms market is trending down in terms of both installed base and revenues.
- Consumer email use continues to grow, especially as more people come online on a worldwide basis, and email remains a key component of the online experience. Email

accounts are the main form of online presence and are required for users to sign up to social networking sites, such as Facebook and Twitter, chat and instant messaging services, shopping portals and any type of online service.

The total worldwide email traffic, including both Business and Consumer emails, is estimated to be over 306 billion emails/day by year-end 2020, growing to over 361 billion emails/day by the end of 2024.

Daily Email Traffic	2020	2021	2022	2023	2024
Total Worldwide Emails Per Day (B)	306.4	319.6	333.2	347.3	361.6
% Change	4%	4%	4%	4%	4%

Table 2: Worldwide Daily Email Traffic, 2020-2024

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