Cloud Business Email Market, 2024-2028

SCOPE

This study provides an analysis of the Cloud Business Email market in 2024, 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.

  o **Hosted Microsoft Exchange Partners** are a sub-segment of Cloud Business Email providers that offer Hosted Microsoft Exchange services to their subscribers.

  o **Google Workspace** 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.

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.

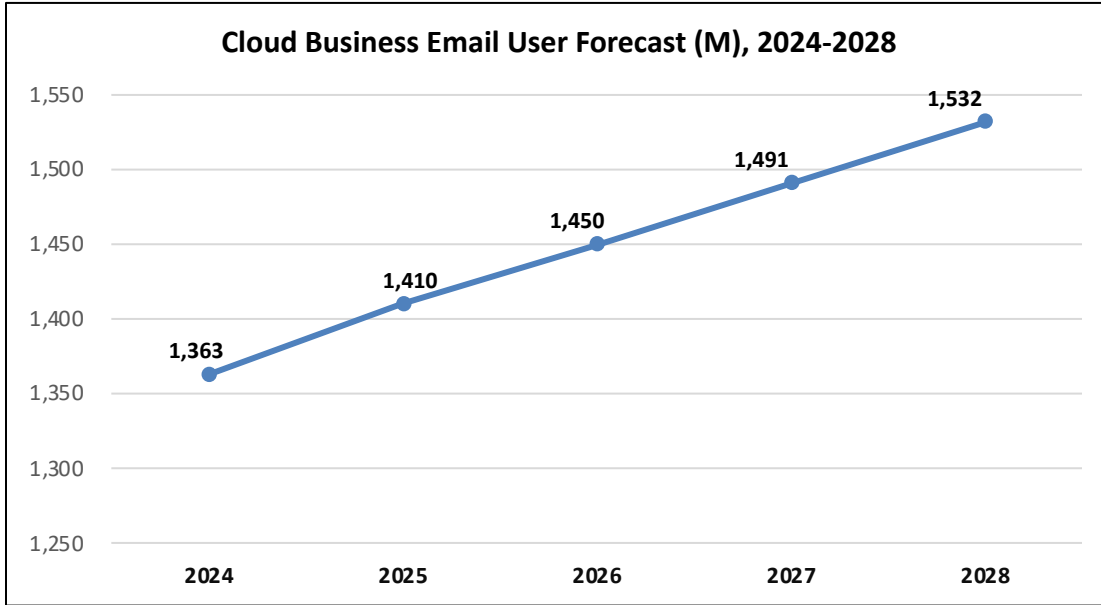Our research processes and methodologies are proprietary and confidential.

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 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.

- SMBs are no longer the main adopters of Cloud Business Email solutions. 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. Key adoption drivers for organizations of all sizes, besides cost and ease of administration, include:

  o Cloud email services are a simple way for businesses to connect geographically dispersed work teams or regional offices with a common infrastructure.

  o 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.

  o 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.

  o 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 users will grow from over 1.3 billion in revenues in 2024, and to over $1.5 billion by 2028.

Cloud Business Email User Forecast (M), 2024-2028

Year	Users (M)
2024	1,363
2025	1,410
2026	1,450
2027	1,491
2028	1,532

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