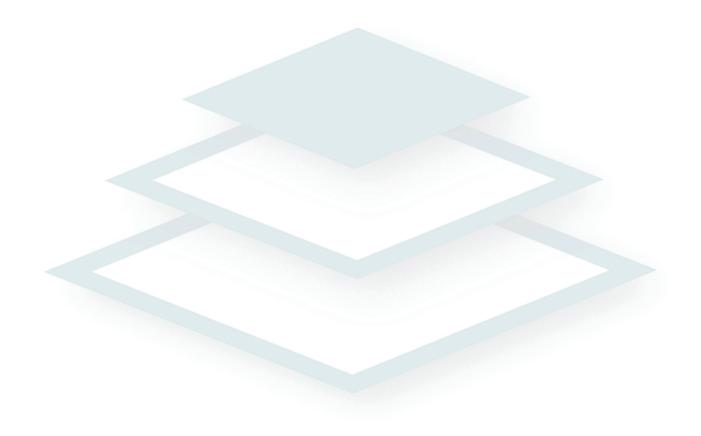


## **EXECUTIVE OVERVIEW**

# MASS-MARKET HOSTING FALL 2012







### REPORT SNAPSHOT

TITLE Mass-Market Hosting – Fall 2012

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#### ABOUT THIS REPORT

451 Research considers the entire realm of hosted infrastructure services – from shared, dedicated and virtual private server hosting to CDN, Web hosting and hosted application service providers – the mass market for IT infrastructure. The focus of this report is on the website and application hosting sector, not other kinds of IT infrastructure, although the lines between these sectors is rapidly blurring.

In this report, 451 Research analyzes the sector's most important developments, and assesses their impact on all parts of the value chain and the many tiers of the competitive landscape. We also take detailed looks at some of the key trends in the areas of product development, marketing, strategy and M&A.

This report provides snapshots of several leading and emerging players as we try to understand the dynamism of the sector and determine which companies will prevail over the long term. Finally, we try to provide perspective on where the sector is headed, while taking a retrospective look to identify some of the root causes of recent successes and failures in the sector.

#### COMPANIES INCLUDED IN THIS REPORT

18t1 InternetcPanelGSI Hosting100TB.comCracked.comHeart Internet2e2 GroupDada SpAHetzner Online

8 to infinity Datapipe HgCapital
AAPT DataXenter HickoryTech
Adobe Systems DediPower Managed Hosting Host Europe
Alchemy Communications Deluxe Hostbed

Amazon Demand Media Hosted Solutions

AppDirect Deutsche Telekom HostGator

Apple Donuts Inc Hosting.com

Apptix Dreamhost Hostopia.com

Arsys Internet Dropbox Hostway

Aruba SpA EarthLink IBM

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AWS eHow iMeet

Axamba Endurance International Insight Technologies

BanamexEngine YardIntelicloudBattery VentureseNomintergeniaBessemer Venture PartnersEQSNIntermediaBlack LotusEvoSwitchIntuitBlacknight SolutionsFacebookInvolta

BlueHost Fasthosts Internet iomart Group

Box.com FastServers iWeb Technologies

BT FiberRing Jimdo
Buongiorno Firstserv KKR
Cbeyond Funio Latisys

CBS Gandi.net Layered Technologies

Choopa.com GlobalGold Network LeaseWeb

Cincinnati Bell GMB Mezzanine Capital Limelight Networks

Cisco Systems GMO Internet Liquid Web
Claranet GoGrid Livestrong.com

CloudFlare goMobi Lloyds TSB Development

Codero Google Capital
Concentric Cloud Solutions Group NBT



#### COMPANIES INCLUDED IN THIS REPORT

M247 Pinterest Time

Mamut Pipex Triangle Capital

MaximumASPRackspaceT-SystemsMedia TempleRed BullTucows

MegaPathRed Fox HostingTwitterMegauploadRedCorunaUK2 Group

Register.com

Melbourne IT

Mesh Digital Register.it United Internet AG

Ultraspeed

Zoho

Microsoft Rise Vanticore
midPhase Services salesforce.com Verio

Montagu Private Equity Samsung VeriSign

Montagu Private Equity Samsung VeriSign

Moonfruit Scopevision viaVerio

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NBC Universal Server.lu Volkswagen

NeoSpire ServerOrigin Communications Voxel

NetBenefit Serverstream VPS.NET

Netfirms SharePoint911 Walmart

Network Solutions NTT Web.com

NEW WORLD APPS Silver Lake Partners WebsPlanet

Newtek Business Services SingleHop Webzilla
Nokia Growth Partners Siteocity Weebly

NTT Six Degrees Group WestHost

Oakley Capital Private Equity Slice Networks Windstream Communications

The Ocom Group SoftLayer Technologies XBT Holding

OpenSRS SolutionPro X0 Communications

OpenStack Sony Yahoo

Open-Xchange Squarespace Yahoo Small Business

Orange Business Services Strato Yammer

Outright Inc Switch Media Yellowpages.com

OVH Technology Crossover Yola
Ventures

Parallels Telefonica

Pastebin

PEER 1 Hosting The Go Daddy Group

The Planet

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#### ABOUT 451 RESEARCH

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