MASS-MARKET HOSTING
FALL 2012

IIR | INTERNET
INFRASTRUCTURE
SERVICES

451 Research

REPORT SNAPSHOT

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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

1&1 Internet	cPanel	GSI Hosting
100TB.com	Cracked.com	Heart Internet
2e2 Group	Dada SpA	Hetzner 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
AT&T	Easyspace	IdeaOne Telecom
AWS	eHow	iMeet
Axamba	Endurance International	Insight Technologies
Banamex	Engine Yard	Intelicloud
Battery Ventures	eNom	intergenia
Bessemer Venture Partners	EQSN	Intermedia
Black Lotus	EvoSwitch	Intuit
Blacknight Solutions	Facebook	Involta
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 Capital
Codero	Google	
Concentric Cloud Solutions	Group NBT	Locaweb
		Lunarpages

COMPANIES INCLUDED IN THIS REPORT

M247

Mamut

MaximumASP

Media Temple

MegaPath

Megaupload

Melbourne IT

Mesh Digital

Microsoft

midPhase Services

Montagu Private Equity

Moonfruit

Myspace

NaviSite

NBC Universal

NeoSpire

NetBenefit

Netfirms

Network Solutions

NEW WORLD APPS

Newtek Business Services

Nokia Growth Partners

NTT

Oakley Capital Private Equity

The Ocom Group

OpenSRS

OpenStack

Open-Xchange

Orange Business Services

Outright Inc

OVH

Parallels

Pastebin

PEER 1 Hosting

Pinterest

Pipex

Rackspace

Red Bull

Red Fox Hosting

RedCoruna

Register.com

Register.it

Rise

salesforce.com

Samsung

Scopevision

SendGrid

ServePath

Server.lu

ServerOrigin Communications

Serverstream

SharePoint911

NTT

Silver Lake Partners

SingleHop

Siteocity

Six Degrees Group

Slice Networks

SoftLayer Technologies

SolutionPro

Sony

Squarespace

Strato

Switch Media

Technology Crossover
   Ventures

Telefonica

The Go Daddy Group

The Planet

Time

Triangle Capital

T-Systems

Tucows

Twitter

UK2 Group

Ultraspeed

United Internet AG

Vanticore

Verio

VeriSign

viaVerio

VISI

Vistaprint

Volkswagen

Voxel

VPS.NET

Walmart

Web.com

WebsPlanet

Webzilla

Weebly

WestHost

Windstream Communications

XBT Holding

XO Communications

Yahoo

Yahoo Small Business

Yammer

Yellowpages.com

Yola

Zoho

TABLE OF CONTENTS

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