



# **Report: Google Workspace vs. Microsoft 365**

## **Impact on Business**

March 2022

# Introduction and Landscape

## CURRENT CLIMATE

Productivity software solutions can define how an organization works, and the last two years have revolutionized almost all aspects of how teams collaborate using their productivity software. Two major trends have emerged:



### REMOTE & HYBRID WORKING

COVID-19 drastically redefined the workplace as employees everywhere were sent home. Desk workers quickly adapted to work-from-home policies and procedures. Remote work has become a standard that will likely persist long after the pandemic ends. Hybrid and full work-from-home models are here to stay.



### THE GREAT RESIGNATION

Throughout 2021, increasing numbers of employees left their jobs. Looking specifically at desk workers, we see increased frustration surrounding communication in the remote world of work. Additionally, work-life balance has become harder to define as homes became workplaces. Increasing burnout has led many desk workers to reconsider their professions altogether.

**The rise in hybrid/remote work models has shone a spotlight on the need for productivity software that enables collaboration, communication, and the building of workplace culture—from anywhere. Based on our survey data, Google Workspace can play a pivotal role in supporting organizations as they adopt new ways of working.**

## SURVEY BACKGROUND

Google commissioned Quadrant Strategies to examine and compare the experiences of organizations using either Google Workspace or Microsoft 365. We did this by documenting what users had to say about their own use of their organization's respective productivity solution, rather than comparing specific Microsoft 365 and Google Workspace features. Conducting this comparison through a quantitative survey provided statistical confidence to our findings.

To make sure we were getting a true comparison, we carefully balanced the two groups of respondents: those using only Microsoft 365, and those using Google Workspace. The goal was to make sure the groups had comparable samples across all characteristics that could influence the results—company size, industry vertical, country, age, ratio of managers to non-managers, and range of job functions and departments within their companies. These comparable samples provided us the assurance that differences are due to experiences with the productivity solutions, rather than differences due to sample. A detailed look at the profiles of the survey respondents is contained in Appendix B.



## KEY FINDINGS

### CULTURE CHANGE

**Google Workspace can create a culture of collaboration** and help drive innovation.

### NETWORK EFFECT

**Businesses that adopt Google Workspace are more likely to report greater productivity, innovation, and increasing revenue** than businesses that adopt Microsoft 365.

### PROOF IN THE SWITCH

**Google Workspace switchers\*** have a more positive view of the solution's impact on collaboration and communication compared to Microsoft 365 switchers.\*

### MOBILE WORK

**The ability to work from devices** other than a computer is a **key differentiator for Google Workspace**, which can allow for **higher remote work** and **deskless productivity** in an increasingly remote and hybrid work world.

### ENGAGES EMPLOYEES

**Switching to Google Workspace was reported with increased innovation, productivity, and improved collaboration.**

### USE LEADS TO PREFERENCE

**The more Google Workspace tools a user employs, the greater their preference for the solution.** Users also report smoother integration and adoption when compared to Microsoft 365.

*\*A switcher is someone who switched from another solution to Google Workspace or M365 during their tenure*



# CREATING A CULTURE OF COLLABORATION

Google Workspace can drive collaboration benefits that positively influence information sharing and innovation.

The greater degree of collaboration associated with Google Workspace was reported to lead to noticeable increases in innovation.

These benefits are allowing employees to work together more efficiently.



## INNOVATION

**82% of Google Workspace switchers\*** say after switching *“my team has become more innovative”*

vs.

**47% of Microsoft 365 switchers\*<sup>1</sup>**



## POSITIVE IMPACT

Google **58%**

Microsoft **29%**

Showing % Yes, [Google Workspace/Microsoft 365] made a significantly positive impact<sup>2</sup>

Ease of sharing information and real-time co-creation in documents helps drive a broader culture of collaboration.

Google Workspace consistently outperformed Microsoft 365 on attributes related to collaboration. Google Workspace users are more likely to agree that real-time collaboration has become the norm on their team.

Google users

Microsoft users

Google/Microsoft allows me to **quickly and easily** get what I need from team members.<sup>3</sup>

56%

43%

Real-time collaboration on document creation has become standard practice for my team using Google/Microsoft.<sup>4</sup>

53%

34%

The average number of collaborators per document in Google Workspace is nearly double the number for Microsoft 365.

## Avg. Collaborators per Document<sup>5</sup>

**13.4**

Google Workspace

**7.2**

Microsoft 365



\*Those who have switched to Google Workspace/Microsoft 365 in their tenure



# NETWORK EFFECT




The positive impacts of Google Workspace are seen among companies of all sizes, but large businesses report an outsized influence on communication and productivity. Google switchers from large businesses are more likely to report innovation and increasing revenue than Microsoft switchers from large businesses.

## COMMUNICATION

Google Workspace users report higher levels of communication than Microsoft 365 users. Additionally, the impact of communication grows with company size for Google.

People on my team think the communication platforms we use on Google/Microsoft facilitate meaningful conversations.<sup>6</sup>

Showing % Strongly Agree

	Google users	Microsoft users
 <b>Small Business</b>	<b>43%</b>	<b>27%</b>
 <b>Mid-Sized Business</b>	<b>48%</b>	<b>45%</b>
 <b>Large Business</b>	<b>54%</b>	<b>40%</b>

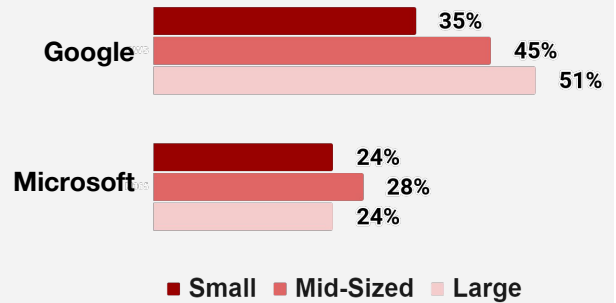
## PRODUCTIVITY

The communication environment created by Google Workspace enabled somewhat higher levels of productivity

Rate your team's productivity<sup>7</sup>

Showing % "5 - Very Productive" (on a 1-5 scale)

The positive impact of Google Workspace on team productivity was greater with company size. Small businesses using Google Workspace report being more productive than small businesses using Microsoft 365, but report less productivity gains compared to larger companies using Google Workspace.



Large businesses that have adopted Google Workspace are more likely to report greater innovation and increasing revenue compared to large businesses that have adopted Microsoft 365.



### INNOVATION

**84%** of Google switchers\* from large businesses say that their company has become "more innovative" since switching software

vs.

**42%** of Microsoft switchers\* from large businesses<sup>8</sup>



### HIGHER REVENUE

**68%** of Google switchers\* from large businesses say that their company's revenue has increased since switching software

vs.

**28%** of Microsoft switchers\* from large businesses<sup>9</sup>

\*Those who have switched to Google Workspace/Microsoft 365 in their tenure



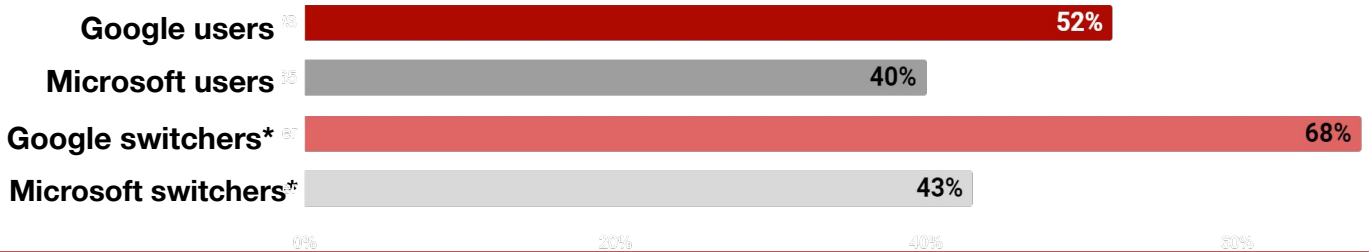
# PROOF IN THE SWITCH

Google Workspace switchers\* report the largest positive impact on how people work together.

Across attributes related to communication and collaboration, Google switchers\* were the most satisfied, even when compared to standard Google Workspace users.

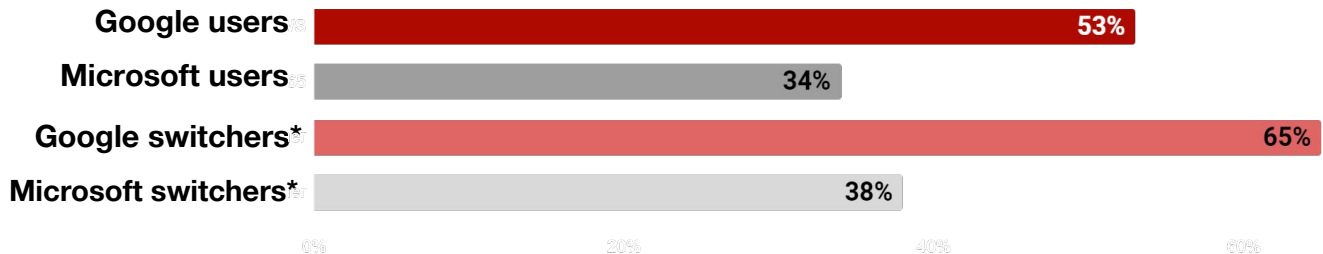
## COMMUNICATION

The communication platforms on [Google/Microsoft] facilitate meaningful conversations.<sup>10</sup>  
Showing % Strongly Agree



## COLLABORATION

Real-time collaboration on document creation has become standard practice for my team using Google Workspace/Microsoft 365.<sup>11</sup>  
Showing % Strongly Agree



## SWITCHERS' PERSPECTIVE

Switchers have a unique perspective since they have experienced their current role under multiple productivity suites. Google Workspace switchers, those whose company adopted Google Workspace during their tenure, consistently report a positive impact on collaboration.



\*Those who have switched to Google Workspace/Microsoft 365 in their tenure



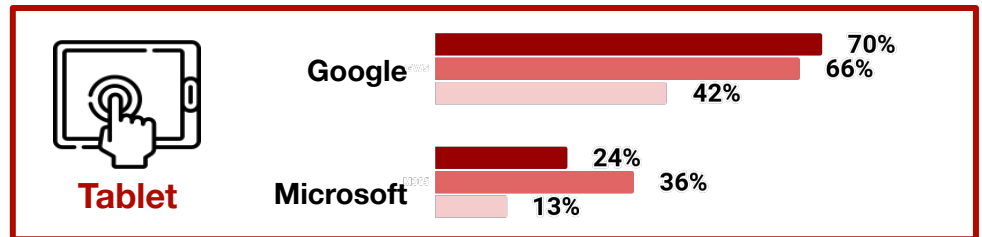
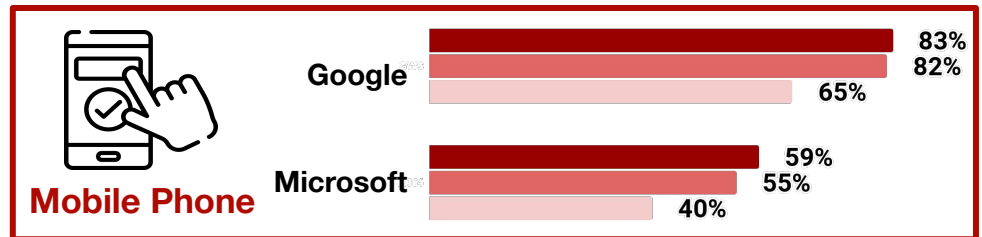
# MOBILE WORK

As many workers transitioned to a remote or hybrid work model, the ability to be productive on devices other than a computer has increased in importance. Our data shows that Google Workspace can deliver a more productive mobile and remote working experience than Microsoft 365.

**52% of Google Workspace users reported that their teams work “very productively” when remote, compared to only 44% of Microsoft 365 users.**<sup>12</sup> Google Workspace users of all ages are working from their phones and tablets more frequently than their Microsoft 365 counterparts. By empowering employees to work from mobile devices anywhere, Google Workspace can increase remote and deskless productivity.

**Google Workspace users are more likely to report working on their phone and tablet compared to Microsoft 365 users.**<sup>13</sup>

Google users of all ages report working on their mobile devices and tablets.



■ Age 18-34 ■ Age 35-54 ■ Age 55+ Showing % who “often” use each device

**Google Workspace users are significantly more mobile than Microsoft 365 users.**<sup>14</sup> Google users were more likely to regularly complete all of the tasks we asked about on their phone or tablet. This difference is especially true when it comes to more involved tasks, like editing spreadsheets and providing feedback.



	Google users	Microsoft users
Check email	71%	65%
Reply to email	65%	59%
Review documents	57%	37%
Schedule meetings	54%	43%
Participate in meetings	54%	47%
Review spreadsheets	50%	30%
Edit documents	49%	28%
Edit spreadsheets	44%	25%
Provide feedback to another employee	42%	29%



# ENGAGES EMPLOYEES

Switching to Google Workspace positively impacts productivity and innovation across age groups, especially for younger (18-34 year old) employees.

## GOOGLE WORKSPACE IMPACT ON ORGANIZATIONS



### PRODUCTIVITY

**70%** of Younger Google switchers\* strongly agree that Google Workspace “saves me time so I’m able to focus on my work”

vs.

**52%** of Younger Microsoft switchers\* <sup>15</sup>



### INNOVATION

**82%** of Younger Google switchers\* say since adopting Google Workspace “my team become more innovative”

vs.

**66%** Younger Microsoft switchers\* <sup>16</sup>

These trends hold true for older employees as well.

## Has [Google/Microsoft] made an impact on the way you work?<sup>17</sup>

Showing % Yes, a significantly positive impact

**18-34**  
Years old

**52%**  
of Microsoft switchers\*     **66%**  
of Google switchers\*

**35-54**  
Years old

**29%**  
of Microsoft switchers\*     **51%**  
of Google switchers\*

**55+**  
Years old

**17%**  
of Microsoft switchers\*     **57%**  
of Google switchers\*

Productivity software has the largest positive impact on the way younger employees work, across Microsoft and Google users. Thus, younger employees derive more positive impacts from Google Workspace, followed closely by older age groups.

\*Those who have switched to Google Workspace/Microsoft 365 in their tenure

Employees of all ages say their teams are more innovative after switching to Google Workspace, and switchers\* report saving more time

Employees of all ages see the positive impacts of Google on the way they work





# USE LEADS TO PREFERENCE

The more Google Workspace tools a user employs, the greater their preference for the solution. Google Workspace users also report smoother integration and adoption when compared to Microsoft 365 users.

## USAGE → PREFERENCE

As users' reliance on Google Workspace tools increases, so does their preference for Google Workspace.<sup>18</sup>

41%

Of those who use only one Google Workspace product category, 41% would prefer to use Google Workspace at work

53%

This increases to 53% for those who use 2 or 3 Google Workspace product categories

68%

And among those who use 4 Workspace product categories, 68% say they would prefer to use Google Workspace at work



## IMPLEMENTATION

### SMOOTH INTEGRATION

1

Google Workspace can be used alongside existing software and integrates well with other software solutions (including Microsoft 365). **Compared to Microsoft 365 users, Google Workspace users report that the solution integrates and interacts more easily with other software.**

**48%**  
*Google Users*

vs.

**25%**  
*Microsoft Users*

report that their software solution interacts "very well" with other software that their team uses.<sup>19</sup>

2

### EASY ADOPTION

50% of Google Workspace switchers\* said their teams felt comfortable using Google Workspace in less than a month.

**50%**  
*Google Switchers*

vs.

**37%**  
*Microsoft Switchers*

said their teams felt comfortable using Google Workspace in less than a month.<sup>20</sup>

## Appendix A: Impact on users by country

### Outcomes for users in the U.S.

Users from the U.S. tended to feel most positively about their productivity software compared to users in France and the U.K.

#### Among GWS users in the U.S.:



60% strongly agree that “[Google Workspace] allows people on my team to get what they need from others at my company quickly and easily”.<sup>21</sup>



64% report that their team works together “very well” using Google Workspace.<sup>22</sup>

### Outcomes for users in the U.K.

Google Workspace users from the U.K. felt more confident in the security and integration of their productivity software than Microsoft 365 users from the U.K.

#### Among users in the U.K.:



60% of Google Workspace users reported feeling that their documents, files, and conversations are “very secure” vs. only 47% of Microsoft 365 users.<sup>23</sup>



42% of Google Workspace users felt that their productivity software interacts “very well” with other software, compared to only 12% of Microsoft 365 users.<sup>24</sup>

### Outcomes for users in France

After switching to Google Workspace, users in France found access to information became notably simpler.

#### Among users in France:



76% of Google Workspace switchers\* reported that it became easier to find information, compared to only 43% of Microsoft 365 switchers.<sup>25</sup>



62% of Google Workspace switchers\* agreed that accessing files through search became easier after switching, compared to only 38% of Microsoft 365 switchers.<sup>26</sup>

## Appendix A: Impact on users by country cont.

### Outcomes for users in India

Google Workspace users in India tended to feel highly positive about their productivity software and are significantly more productive on mobile than Microsoft 365 users.

#### Among users in India:



74% of Google Workspace users felt that their team works together “very well” using Google Workspace.<sup>27</sup>



79% of Google Workspace users reported being able to be “very productive” while remote, compared to only 52% for Microsoft 365.<sup>28</sup>

### Outcomes for users in Brazil

Google Workspace users in Brazil are much more likely to complete intensive tasks with their mobile devices than their Microsoft 365 counterparts.

#### Among users in Brazil:



67% of Google Workspace users regularly participate in meetings through their phone or tablet, compared to only 53% of Microsoft 365 users.<sup>29</sup>



64% report working on their phone “very often” compared to only 44% of Microsoft 365 users.<sup>30</sup>

### Outcomes for users in Japan

Collaboration is less popular among Google Workspace users in Japan with smaller shares finding collaboration to be standard practice.

#### Among users in Japan:



Only 22% strongly agree that real time collaboration has become the norm on their team using Google Workspace.<sup>31</sup>



68% report working “independently on a single document and then [passing] it to the next person” using Google Workspace.<sup>32</sup>

## Appendix B: Methodology

This study was commissioned by Google and conducted by Quadrant Strategies. We surveyed 1,400 desk workers across six countries from November through December 2021 as the basis of this report. In total, participants answered 104 questions.

We matched the two halves of the sample across a broad range of characteristics (outlined in the table below) in order to ensure that sample differences were not driving the results. With a 95% confidence interval, the margin of error is  $\pm 3.7\%$  for Google Workspace users and  $\pm 3.7\%$  for Microsoft 365 users.

Category		Google Workspace users	Microsoft 365 users
Company size	Small (5-99 employees)	19%	10%
	Medium (100-999 employees)	41%	32%
	Large (1,000+ employees)	40%	59%
Manager	Manager	88%	66%
	Non-manager	11%	33%
	Other	1%	1%
Age	18-24	7%	6%
	25 to 34	41%	27%
	35 to 44	31%	28%
	45 to 54	11%	29%
	55 to 64	9%	9%
	65+	1%	1%
Industry	Technology + Media	26%	20%
	Banking + Financial + Insurance	16%	12%
	Consulting + Legal	5%	5%
	Healthcare	6%	8%
	Real estate	4%	4%
	Manufacturing + Automotive + Transportation	18%	17%
	Retail + Food and beverage	10%	8%
	Education + Government + Not-for-profit	11%	13%
	Engineering + Energy + Telecommunications	12%	12%
Other	10%	10%	
Department	Administration	14%	8%
	Management	19%	8%
	Operations	13%	17%
	Finance	14%	8%
	Client Services	8%	6%
	Sales	10%	6%
	IT	38%	41%
	Research	6%	4%
	Legal	6%	3%
	Human Resources	12%	5%
	Marketing or Public Relations	7%	4%
	Engineering	8%	8%
Other	4%	6%	
Country	US	N=200	N=200
	UK	N=100	N=100
	France	N=100	N=100
	India	N=100	N=100
	Japan	N=100	N=100
	Brazil	N=100	N=100

In each group, we identified people as switchers if they had moved from a different productivity suite to either Microsoft 365 or Google Workspace in their tenure at their company. 34% (240 respondents) of our Google Workspace users and 77% (542 respondents) of the Microsoft 365 users met this definition of *switcher*, and were asked the questions covering their experience of switching. For questions related to switchers, the margin of error with a 95% confidence interval is  $\pm 6.33\%$  for Google Workspace switchers and  $\pm 4.21\%$  for Microsoft 365 switchers.

# Appendix C: Endnotes

## Page 4:

1. Q67: Since you adopted [Google Workspace/Microsoft 365], your team has become:
  - a. More innovative
  - b. Less innovative
  - c. No different
2. Q72: Has [Google Workspace/ Microsoft 365] made an impact on the way you work?
  - a. Yes, a significantly negative impact
  - b. Yes, a somewhat negative impact
  - c. No, no impact
  - d. Yes, a somewhat positive impact
  - e. Yes, a significantly positive impact
3. Q23a: Please indicate how much you agree or disagree with the following statements: [Google Workspace/Microsoft 365] makes it quick and easy for me to get what I need from other team members
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
4. Q21: How much do you agree or disagree with the following statement: Real time collaboration on document creation has become standard practice for my team using [Google Workspace/Microsoft 365].
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
5. Q12: On average, how many people do you collaborate on a document with, before it is finalized? (Open end numeric).

## Page 5:

6. Q31c: Please indicate how much you agree or disagree with the following statements: People on my team think the communication platforms we use on [Google Workspace/Microsoft 365] facilitate meaningful conversations.
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
7. Q90: How would you rate your team's productivity on the following scale of 1-5?
  - a. 5 - Very productive
  - b. 4
  - c. 3 - Somewhat productive
  - d. 2
  - e. 1 - Not productive
8. Q67: Since you adopted [Google Workspace/Microsoft 365], your team has become:
  - a. More innovative
  - b. Less innovative
  - c. No different
9. Q68: Since you adopted [Google Workspace/ Microsoft 365], your company has:
  - a. Increased its revenue
  - b. Had no change in revenue
  - c. Decreased its revenue
  - d. Don't know

# Appendix C: Endnotes

## Page 6:

10. Q31c: Please indicate how much you agree or disagree with the following statements: People on my team think the communication platforms we use on [Google Workspace/Microsoft 365] facilitate meaningful conversations.
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
11. Q21: How much do you agree or disagree with the following statement: Real time collaboration on document creation has become standard practice for my team using [Google Workspace/Microsoft 365].
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree

## Page 7:

12. Q42: How productive is your team able to be while working remotely using [Google Workspace/ Microsoft 365] tools?
  - a. We never work remotely
  - b. Not at all productive
  - c. Not very productive
  - d. Somewhat productive
  - e. Very productive
13. Q41. How often do you work on:
  - a. A mobile phone
  - b. A tablet
  - c. A computer
    - i. Very often
    - ii. Somewhat often
    - iii. Not very often
    - iv. Not at all
14. Q40. Which of the following tasks do you regularly complete through your phone or tablet?
  - e. Check email
  - f. Reply to email
  - g. Review documents
  - h. Review spreadsheets
  - i. Edit documents
  - j. Edit spreadsheets
  - k. Provide feedback to another employee
  - l. Schedule meetings
  - m. Participate in meetings
  - n. None of the above

# Appendix C: Endnotes

## Page 8:

15. Q65: How much do you agree or disagree with the following statement: [Google Workspace/ Microsoft 365] saves me time so I'm able to focus on my work.
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
16. Q67: Since you adopted [Google Workspace/Microsoft 365], your team has become:
  - a. More innovative
  - b. Less innovative
  - c. No different
17. Q72: Has [Google Workspace/ Microsoft 365] made an impact on the way you work?
  - a. Yes, a significantly negative impact
  - b. Yes, a somewhat negative impact
  - c. No, no impact
  - d. Yes, a somewhat positive impact
  - e. Yes, a significantly positive impact

## Page 9:

18. Q76: Given the choice, which would you prefer to use at work:
  - a. Microsoft 365
  - b. Google Workspace
19. Q56: How well does your [Google Workspace/ Microsoft 365] interact with other software that your team uses (e.g. CRM, Slack)?
  - a. Very poorly
  - b. Somewhat poorly
  - c. Somewhat well
  - d. Very well
20. Q70: How long did it take your team to feel comfortable using [Google Workspace/ Microsoft 365]:
  - a. Immediately
  - b. Less than 1 month
  - c. Between 1 and 3 months
  - d. Between 3 and 5 months
  - e. Between 6 months and 1 year
  - f. Between 1 and 2 years
  - g. More than 2 years
  - h. We still have not fully adopted [Google Workspace/ Microsoft 365]

## Page 10:

21. Q22a: Please indicate how much you agree or disagree with the following statements: [Google Workspace/Microsoft 365] allows people on my team to get what they need from others at my company quickly and easily
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
22. Q36: How well do you feel your team works together using [Google Workspace/Microsoft 365]?
  - a. Very well
  - b. Somewhat well
  - c. Not very well
  - d. Not at all well
23. Q51: How secure do you feel your documents, files and conversations are on [Google Workspace/Microsoft 365]?
  - a. Not at all secure
  - b. Not very secure
  - c. Somewhat secure
  - d. Very secure
24. Q56: How well does your [Google Workspace/ Microsoft 365] interact with other software that your team uses (e.g. CRM, Slack)?
  - a. Very poorly
  - b. Somewhat poorly
  - c. Somewhat well
  - d. Very well
25. Q61: Since you adopted [Google Workspace/Microsoft 365], it is easier to find information:
  - a. True
  - b. False
  - c. It is about the same
26. Q57: Since you adopted [Google Workspace/Microsoft 365], accessing files through search has become:
  - a. Simpler
  - b. More complex
  - c. No different



## Page 11:

27. Q36: How well do you feel your team works together using [Google Workspace/Microsoft 365]?
  - a. Not at all well
  - b. Not very well
  - c. Somewhat well
  - d. Very well
28. Q42: How productive is your team able to be while working remotely using [Google Workspace/Microsoft 365] tools?
  - a. We never work remotely
  - b. Not at all productive
  - c. Not very productive
  - d. Somewhat productive
  - e. Very productive
29. Q40: Which of the following tasks do you regularly complete through your phone or tablet? Select all that apply. Think of [Google Workspace/Microsoft 365] apps only for this question.
  - a. Check email
  - b. Reply to email
  - c. Review documents
  - d. Review spreadsheets
  - e. Edit documents
  - f. Edit spreadsheets
  - g. Provide feedback to another employee
  - h. Schedule meetings
  - i. Participate in meetings
  - j. None of the above
30. Q41a: How often do you work on: A mobile phone
  - a. Very often
  - b. Somewhat often
  - c. Not very often
  - d. Not at all
31. Q21: How much do you agree or disagree with the following statement: Real time collaboration on document creation has become standard practice for my team using [Google Workspace/Microsoft 365].
  - a. Strongly disagree
  - b. Somewhat disagree
  - c. Somewhat agree
  - d. Strongly agree
32. Q19: Does your team tend to:
  - a. Work independently on a single document and then pass it to the next person
  - b. Work simultaneously on the same document

## About Quadrant Strategies

**Quadrant Strategies** is a research-driven consultancy that helps Fortune 100 companies, major NGOs, and issue advocacy groups understand what drives their customers and stakeholders to take action. Our specialty is helping companies and organizations unearth and engage the core drivers of decisions for their target customers. We do this using carefully crafted research to create the strategy and tactics for companies to use to communicate with the people they care about in an authentic way.

Quadrant was founded on a very clear principle: clients must truly understand their target audience and their needs and perceptions to make informed and effective decisions. Our partners have advised over half of the Fortune 50 companies over the last two decades. We are not your traditional market research firm, and we won't deliver a pile of data—you will get clear, actionable advice. Since its founding, Quadrant has consistently grown each year at a rate that eclipses the industry overall and has been named to the 2021 Inc. Magazine list of the country's fastest growing companies.