

Market Analysis

CEO DESK – AI research Report

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The Market

A trend towards adapting employee needs to the modern workplace environment.

Two horizontal lines of different lengths, the top one being longer than the bottom one, positioned on the left side of the slide.A decorative wavy line that spans the width of the slide, separating the main content area from the dark blue footer.

Market Overview

As society changes, so does the business world, each day moving towards being more adaptable, global, and diverse in terms of its workforce. In this ever-changing world, where organisations strive towards a boundary-less abode, engaging, enhancing, and retaining the workforce has become challenging. The digital age defines the concept of workplace 4.0. With advancements in technology and globalisation, the workplace concept has changed dramatically. Technology has allowed people to work remotely and hire talent from other countries, which was not previously the case a few decades ago. In workplace 4.0, getting teams digitally proficient and growing their capabilities with the correct communication technology and hardware has become a pressing need. Over the last two decades, we have seen a shift from satisfied employees to dedicated employees who are not prone to turnover but are deeply invested in the organisation's mission and success and frequently serve as the driving force behind it.

Employee experience becomes a crucial notion because of the necessity to reinterpret policies to improve the link between the staff and the organisation. The focus must move from traditional "transactional" human resource strategies to "transformational" ones that focus on individual employees' needs, wants, anxieties, and emotions. Employee experiences directly impact employee satisfaction, engagement, commitment, and, ultimately, performance.

A motivated employee well serves a consumer. The customer is satisfied, so they return, which benefits the shareholders. It is not one of history's great mysteries; it is just the way things work.

Key Workplace Trends:

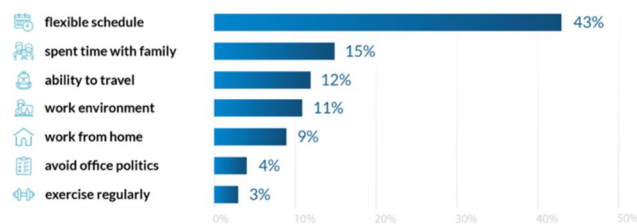
1 The Effects of positive workplace environment

Source: AON 2018



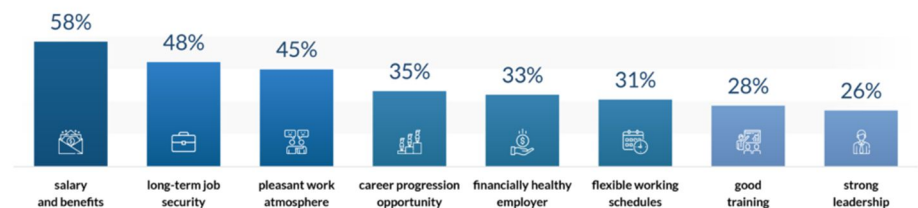
2 Reasons for increased interest in remote work

Source: Buffer State of Remote Work 2018



3 Factors that attract employees to a potential employer

Source: Randstad 2017



A) The Digital Workplace Market

The global digital workplace market size was valued at \$ 27.3 billion in 2021, \$ 30.7 billion in 2022 and is expected to expand at a compound annual growth rate (CAGR) of 22.5% from 2022 to 2030. The current growth can be attributed to the increased digitalisation, increasing demand for desktop-as-a-service, and growing demand for employees for greater flexibility in terms of work-life balance. With the outbreak of the COVID-19 pandemic, businesses have shifted to remote working and transformed their technologies to create a digital workplace to ensure business continuity. The pandemic has necessitated the widespread use of video and web conferencing, which has led to the development of new methods of communication and facilitating team bonding and collaboration. Furthermore, due to the ease with which pandemics can spread, several organisations have made long-term investments in workplace transformation for the hybrid work model, necessitating cloud-based solutions to enable remote working with secure access.

The digital workplace provides several benefits with the increasing digital technology of smart assets to help employees work efficiently without compromising ongoing operations. The rising adoption of advanced technologies, such as Bring Your Own Device (BYOD) and enterprise mobility by organisations, contribute to market growth. It boosts flexibility and mobility while decreasing time spent on hardware and software licensing and device management for business-owned devices. It alters the nature of workplaces and processes, aided by organisational restructuring, and reduces the operational expenditure of businesses.

Furthermore, with the help of Artificial Intelligence (AI), the Internet of Things (IoT), and Virtual Reality (VR), workplaces are expected to implement more cloud-based and flexibility-enhancing accessibility solutions. These advantages and advancements will drive the industry's growth during the forecast period.

With the recent focus on digital workplaces and remote working, AI and automation technological proliferation play a vital role in automating manual processes and creating new opportunities for organisations to improve productivity and streamline the process.

The pandemic has proven it:

The modern workplace is an urgent necessity

74%

of companies polled offered their employees remote work options – as opposed to just 19% before the pandemic

82%

of companies polled found that they saved time when employees worked remote as compared to on-site

77%

of digitally advanced could react quickly and flexibly to the pandemic – but only 36% of other firms said the same

The advancement in mobile technologies, changing workforce demographics, and the rising trend of connected workplaces are the driving forces of the digital workplace transformation services industry. Several future workspaces are increasingly adopting cloud services such as Infrastructure as a Service (IaaS), Backend as a Service

(BaaS), Platform as a Service (PaaS), Software as a Service (SaaS) or the all-in-one Workplace as a Service (WaaS), to support their business needs and get the work done smoothly.

Furthermore, using cloud services, organisations can provide instant access to business-critical data and enterprise applications on a variety of devices, such as tablets, smartphones, and laptops, while maintaining security restraints. These factors are expected to provide growth opportunities for the key players operating in the global digital workplace market over the forecast period.

The solution segment held a market share of 67.6% in 2021. The segment growth can be attributed to the adoption of workplace solutions, such as social and collaborative tools, cloud storage tools, and content management systems among end-users to enhance resource usage and productivity. It enables a workplace social network, fosters collaborations and team building across the organisation, and provides access to social media for posting corporate messages. Furthermore, it enhances productivity and efficiency with self-service capabilities for the IT departments in the organisation. These benefits provided by digital workplace solutions will supplement the growth of the segment during the forecast period.

The services segment is expected to grow at a CAGR of 23.5% during the forecast period. It includes consulting services, training support and maintenance, and integration and implementation services. These services help organisations to align their digital workplaces efficiently and effectively.

Moreover, they deliver cost-effective support for technical queries and prevent downtime caused by implementing digital workplace solutions. Also, it helps organisations maintain a competitive edge in the market by providing several benefits, such as stable operating environments and reducing governance and compliance risks. These factors will further boost the adoption of digital workplaces during the forecast period.



B) Overview of the Microsoft Surface Opportunity

Microsoft Surface is a series of touchscreen-based personal computers, tablets and interactive whiteboards designed and developed by Microsoft, running the Microsoft Windows operating system, apart from the Surface Duo, which runs on Android.

- The devices are manufactured by original equipment manufacturers, including Pegatron, and are designed to be premium devices that set examples for Windows OEMs.
- It comprises seven generations of hybrid tablets, 2-in-1 detachable notebooks, a convertible desktop all-in-one, an interactive whiteboard, and various accessories, all with unique form factors.
- The majority of the Surface lineup features Intel processors and is compatible with Microsoft's Windows 10 or Windows 11 operating system.

History:

- Microsoft first announced Surface at an event on June 18, 2012, presented by former CEO Steve Ballmer. Surface was the first major initiative by Microsoft to integrate its Windows operating system with its own hardware and is the first PC designed and distributed solely by Microsoft.
- In November 2012, Ballmer described the distribution approach to Surface as "modest", and on November 29 of that year, Microsoft revealed the pricing for the 64 GB and 128 GB versions of Surface with Windows 8 Pro. Though there was less demand for the 64GB version because of the much smaller available storage capacity, supplies of the lower-cost unit were almost as tight.
- The following year, in 2015, it announced the Surface 3, a more compact version of the Surface Pro 3. In September 2015, Microsoft announced the "Surface Enterprise Initiative", a partnership between Accenture, Avanade, Dell Inc., and HP, to "enable more customers to enjoy the benefits of Windows 10." As part of the cooperation, Dell will resell Surface Pro products through its business and enterprise channels and offer its existing enterprise services (including Pro Support, warranty, and Configuration and Deployment) for the Surface Pro devices it sells.
- Microsoft announced the next generation Surface Pro 4 and the all-new Surface Book, a hybrid laptop, at Microsoft October 2015 Event. Microsoft began shipping Surface Hub devices on March 25, 2016. In June 2016, Microsoft confirmed that production of the Surface 3 would stop in December of the same year. No replacement product has been announced.
- Immediately following the announcement of the Surface Laptop at the #MicrosoftEDU event in 2017, Microsoft announced the fifth-generation Surface Pro at a special event in Shanghai.
- In 2018, Microsoft announced the Surface Hub 2, featuring a new rotating hinge and the ability to link multiple Hubs together.
- In June 2018, Microsoft announced the Surface Go, a \$400 tablet with a 10-inch screen and 64 or 128 GB of storage.
- In 2019, Microsoft announced the Surface Pro 7, the Surface Laptop 3, and the Surface Pro X. Both the Surface Pro 7 and the Surface Laptop 3 come with a USB-C port. The Surface Pro X comes with the Microsoft SQ1 ARM processor. Microsoft also teased upcoming products: the Surface Neo, a dual-screen tablet originally planned to run Windows 10X; and the Surface Duo, a dual-screen mobile phone that runs Android. Both products were initially announced to be released in 2020, though reports suggest the release of the Surface Neo will be delayed until 2021. The Surface Duo was released on September 10, 2020.
- In 2021, Microsoft announced the Surface Pro 8, the Surface Duo 2 and the Surface Laptop Studio.
- In November 2022, Microsoft released the Surface Pro 9, Surface Laptop 5, as well as the much-anticipated Surface Studio 2+.

Microsoft's market share of the global tablet market is still relatively small, but the trend is growing.



In Microsoft's most recent fiscal year, the Surface generated \$6.7 billion of the company's total revenue of \$198 billion.

Microsoft Surface are among the most popular pieces of computer hardware on the market. They've earned a reputation for excellence within the business sphere thanks partly to Microsoft's trusted brand identity. Microsoft is synonymous with computer hardware in public psychology. Alongside Apple, Microsoft is easily one of the biggest names in computer equipment.

C) Overview of the Global Productivity Software Opportunity

The global productivity software publishing market grew from \$81.16 billion in 2021 to \$91.86 billion in 2022 at a compound annual growth rate (CAGR) of 13.2%. The market is expected to reach \$132.94 billion in 2026 at a CAGR of 9.7%.

Cloud-based technology drives the productivity software publishing market. The cloud-based productivity software allows all the team members to share, collaborate and communicate on projects effectively, not having to physically meet/share anything on disc/USB. The cloud-based software enhances the workflow by making it more straightforward to work with.

- This easy platform could deliver many applications involving graphics software, spreadsheet applications, database management systems and word processors to the end users. Also, the cloud-based software controls, safeguards and installs the software automatically without having to physically monitor it.
- Due to the software's ability to turn the technical power of these software tools into strategic action, managers are better positioned to gain visibility into how workers are fulfilling their responsibilities and take steps to ensure they reach crucial milestones. Examples of cloud-based productivity software include Microsoft Office 365, Zoho office online suite, Apple iWork and more.

One of the leading providers in the global productivity software market is Microsoft. Microsoft has a wide variety of products that provide tools to improve work productivity. These products include Outlook, Word, Excel, PowerPoint, and Access.

- Overall, there is a growing demand for the productivity software market across all business sectors. As efficiencies continue to increase, so will the popularity of these products.
- Windows-based productivity applications (59%) and Macs (26%) were the most popular platforms for productivity software, followed by iOS devices (19%). Office 365 (25%) was the most popular productivity application across all platforms in the productivity software market.

The global market for Cloud Based Office Productivity Software, estimated at US\$12.6 Billion in the year 2020, is projected to reach a revised size of US\$50.7 Billion by 2026, growing at a CAGR of 25.5% over the analysis period.

- In recent years, there has been a significant increase in the adoption and subscription of cloud-based office productivity software, which is driving growth in the market.
- The cloud-based office productivity software is growing in prominence due to the large number of applications that end-users, including word processors, graphics software, spreadsheets and database management systems, can use.
- In addition, progressions in information investigation and business knowledge have been fueling market growth. COVID-19 has accelerated demand for cloud-based offerings due to the drastic and sudden shift to remote working. Cloud computing infrastructure and software helped keep businesses online, communicating and functioning with minimal disruption.
- Even after the pandemic, the migration to cloud office suites is expected to continue, with the growing realisation among organisations that the flexibility and resilience offered by cloud collaboration platforms are greater than the advantage of control provided by on-premise software implementations.

Conclusion:

The global Cloud Based Office Productivity Software market has immense growth opportunities that key vendors can tap into, especially in developed regions. The presence of prominent, small, and local vendors creates a competitive environment. Key Players dominate the market; these vendors are consolidating their position by acquiring smaller companies and expanding their business operations by leveraging their product portfolio across the globe.

Microsoft continues to dominate the market for cloud productivity suites. That's probably a given. But Google continues to take 1% to 2% of market share annually, often through additive spending rather than competitive takeouts.

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