Google Workspace vs. Microsoft 365

Why the choice of productivity tools matter

Introduction & Report Background

Google Workspace commissioned Hypothesis Group, an independent research and strategy firm, to examine and compare the experiences of organizations using either Google Workspace (Workspace) or Microsoft 365 (M365). Both are SaaS-based productivity applications; Workspace includes Gmail, Drive, Docs, Sheets, Slides, and Meet, while M365 includes Outlook, SharePoint, Word, Excel, PowerPoint, and Teams.

Hypothesis Group designed and executed the methodology, which included documentation of what employees across roles and lines of business had to say about their use of their organization's respective productivity solutions, inclusive of integrated AI features, rather than comparing specific Google Workspace and Microsoft 365 features.

This comparison was conducted via a blinded quantitative survey among full-time employees aged 18+ who use Workspace or M365. The survey was conducted online from June 16–July 9, 2025 in the United States, United Kingdom, Germany, France, India, Japan, and Brazil at organizations of various sizes: Small Businesses (5–99 employees), Medium/ Mid-Market (100–999 employees), and Enterprise (1,000+ employees).

The survey was conducted among 1,600 respondents, a sufficient sample to achieve statistical confidence in our findings. The sample included approximately equal numbers of Workspace and M365 users, ensuring a valid comparison between similar samples.

To support the comparison, the sample reflected an equivalent mix of firmographics, including company size, industry vertical, country, ratio of individual contributors to managers, job functions, and departments to ensure the results were representative and not impacted by a skew in the sample.

A detailed look at the profiles of the survey respondents is contained in Appendix A, and a full list of the survey questions and answer choices is included in Appendix B. All data metrics not included in the main paper can be found in Appendix C.

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Key Findings

Value of AI Features

Organizations using Google Workspace with Gemini report greater benefits from AI than organizations using Microsoft 365 with Copilot

- 82% of Workspace users find AI features valuable (vs. 66% M365 users)
- Google Workspace with Gemini users report greater confidence effectively integrating AI into their work (+17pp vs. Microsoft Copilot users)

Security & IT Management Costs

Compared to organizations with Microsoft 365, organizations with Google Workspace cite stronger IT and Security management benefits

- Workspace users are more likely to say that Workspace lowers IT management costs (77% vs. 64% M365)
- 33% of Workspace users say the number of security incidents has decreased over the last 24 months (vs. 22% M365)

Employee Satisfaction & Retention

Google Workspace users report an enhanced employee experience at both the individual and organizational level

- 76% of Workspace users report that it improves employee retention (vs. 58% M365)
- 85% of Workspace users say it improves employee satisfaction (vs. 76% M365)

Employee Productivity & Business Growth

Organizations using Google Workspace report enhanced productivity, innovation, and revenue growth, compared to organizations using Microsoft 365

- 85% of Workspace users say the suite makes their team more productive (vs. 75% M365 users)
- Two-thirds of Workspace users say their revenue has increased in the past two years (+14pp vs. M365)...and 75% of them say that Workspace played an important role in doing so (+13pp vs. M365)

Throughout this paper, you'll see data points marked with the following icons:

Organizations that have switched to Google Workspace

Organizations that have switched to Google Workspace are seeing more business growth and gains with AI than organizations that have migrated to Microsoft 365.

Organizations that have switched to Workspace report significantly stronger AI experiences (vs. those who switched to M365):

- 60% say that AI provides a high ROI (+14pp)
- 61% report confidence integrating AI into work (+15pp)

Companies that have switched to Workspace see higher rates of employee retention (+9pp vs. those who switched to M365)

Enterprise organizations

Among organizations with 1,000+ employees, Google Workspace performs stronger than Microsoft 365 on lowering IT costs, security incidents, and mobile device compatibility.

Enterprise organizations that use Workspace are more likely to report AI value, integration, and efficiencies (vs. enterprise organizations using M365):

- 85% of enterprise orgs using Workspace say that it provides "AI features provide value, not just hype" (+19pp)
- 82% of enterprise orgs using Workspace say that it "Integrates with other software I use (e.g., Slack, CRM)" (+23pp)
- 79% of enterprise orgs using Workspace note that Workspace "Lowers our IT management costs" (+17pp)
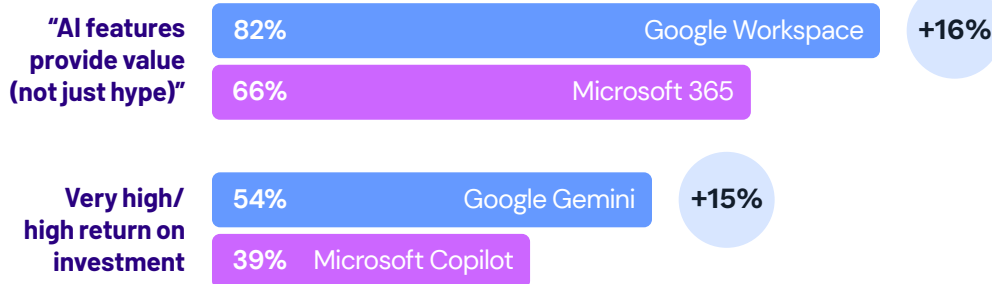
1 Value of AI Features

Adoption of AI within organizations has grown rapidly. Among those surveyed, 88% are adopting or exploring AI technologies for their organizations.

Organizations with Google Workspace are more likely to see benefits from AI than organizations with Microsoft 365. Overall, 82% of Workspace users say the apps have "AI features that provide value (not just hype)" compared to 66% of M365 users (+16%). The gap is larger among individual contributors (ICs), with 67% of ICs who use Workspace agreeing compared to 44% of ICs who use M365 (+22%).

> The majority of enterprise organizations using Workspace also report that Workspace offers AI features that provide value (85%), far more than enterprise organizations using M365 (66%).

Google Workspace users report **greater return on investment** from Gemini vs. Microsoft 365 users (+15%).

"AI features provide value (not just hype)"
- 82% Google Workspace — +16%
- 66% Microsoft 365

Very high/ high return on investment
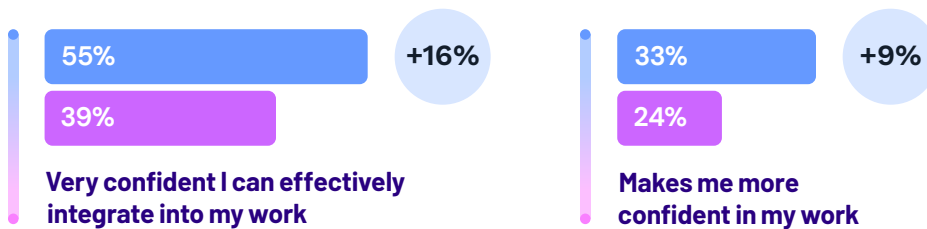- 54% Google Gemini — +15%
- 39% Microsoft Copilot

Additionally, 44% of Workspace users say they've actively deployed AI across multiple functions, compared to 37% of M365 users.* Google Gemini users are more likely than Copilot users to say Gemini is useful for real, everyday users like themselves.

53%
Google Gemini is useful for real, everyday users like me
(VS. 43% MICROSOFT COPILOT)

Moreover, Google Gemini boosts confidence more than Microsoft Copilot.

🟦 Google Gemini 🟪 Microsoft Copilot

55% (Google Gemini) **+16%**	**33%** (Google Gemini) **+9%**
39% (Microsoft Copilot)	**24%** (Microsoft Copilot)
Very confident I can effectively integrate into my work	**Makes me more confident in my work**

Workspace is more likely than M365 to have AI capabilities that help in a variety of real, tangible ways. Workspace outperforms M365 on a variety of features, including conducting deep research, organizing data, and automating repetitive tasks. This is especially true for individual contributors who use Workspace, compared to ICs who use M365.
🔒 This trend holds true in enterprise organizations.

AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365	% GAP FOR TOTAL	% GAP FOR INDIVIDUAL CONTRIBUTORS
Helps with deep research by using generative AI	**+22%**	**+29%**
Organizes data with generative AI	**+21%**	**+30%**
Leverages generative AI to create and summarize text or images	**+21%**	**+26%**
Helps with automating repetitive tasks by using generative AI	**+20%**	**+28%**
Increases productivity with generative AI	**+18%**	**+24%**
Unlocks creativity more easily with generative AI	**+18%**	**+27%**
Facilitates quick learning with generative AI	**+18%**	**+19%**
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	**+18%**	**+19%**
Unlocks knowledge more easily with generative AI	**+18%**	**+27%**

Organizations that switched to Workspace report more tangible outcomes than their M365 counterparts, particularly in supporting complex work and unlocking knowledge. They are more likely to report strong return on investment (ROI) from AI and express greater confidence in integrating AI into their work.

Users of Google Gemini have better perceptions of its impact versus Microsoft Copilot users. Gemini is more accessible/easy to use across devices, makes users value AI more, and is easy to integrate into their workflow, making it more than just for basic productivity tasks. Individual contributors are even more likely to feel this way.

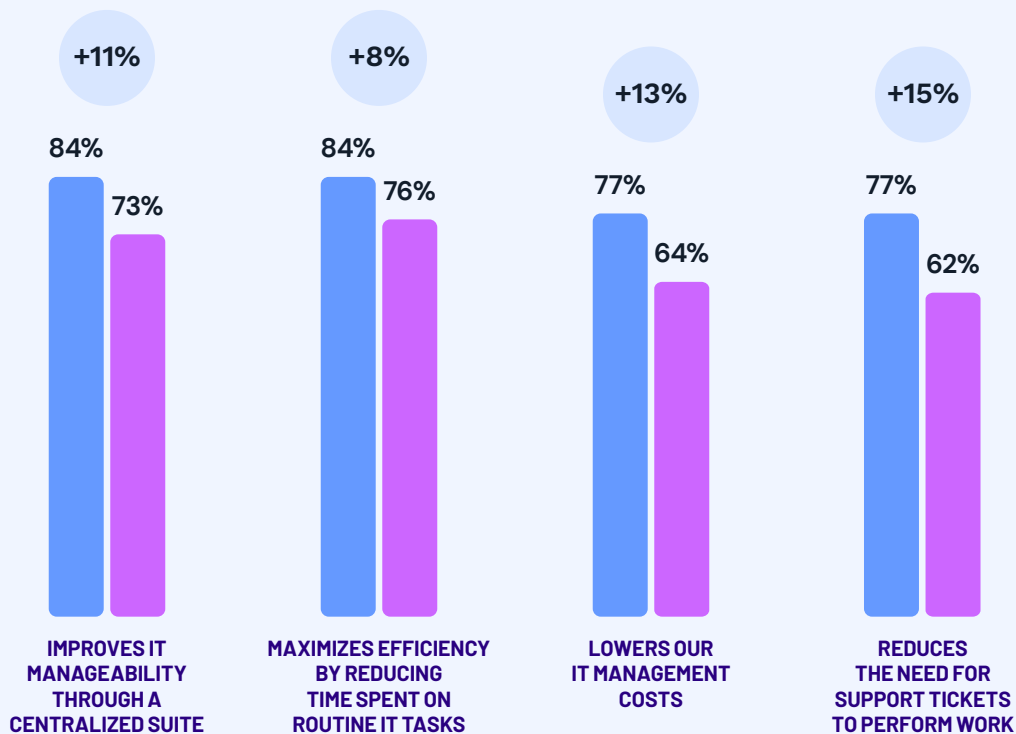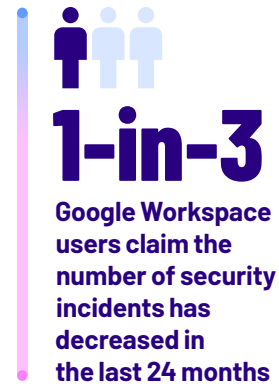| % AGREE WITH STATEMENTS ABOUT GOOGLE GEMINI VS. MICROSOFT COPILOT	% GAP FOR TOTAL	% GAP FOR INDIVIDUAL CONTRIBUTORS
Makes me value artificial intelligence (AI) more	+13%	+17%
Is easy to integrate into my workflow	+12%	+18%
Is accessible and easy to use on both desktop and mobile devices	+11%	+13%
Is useful for real, everyday users like me	+10%	+29%
Is for more than just basic productivity tasks	+10%	+13%
Demonstrates the value of generative AI	+9%	+16%
Has strong security and privacy protection	+9%	+20%
Is intuitive to use	+9%	+23%
Increases innovation at my company	+9%	+18%
Increases employee collaboration	+9%	+24%

2 Security & IT Management Costs

The survey shows that Google Workspace helps IT manageability and security needs better than Microsoft 365. 84% of Workspace users report that Workspace **improved IT management**, compared to 73% for M365 users. Even more, Workspace users are more likely to say that it **maximizes IT efficiency and reduces the need for support tickets and IT costs.**

FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365

■ Workspace Users   ■ M365 Users

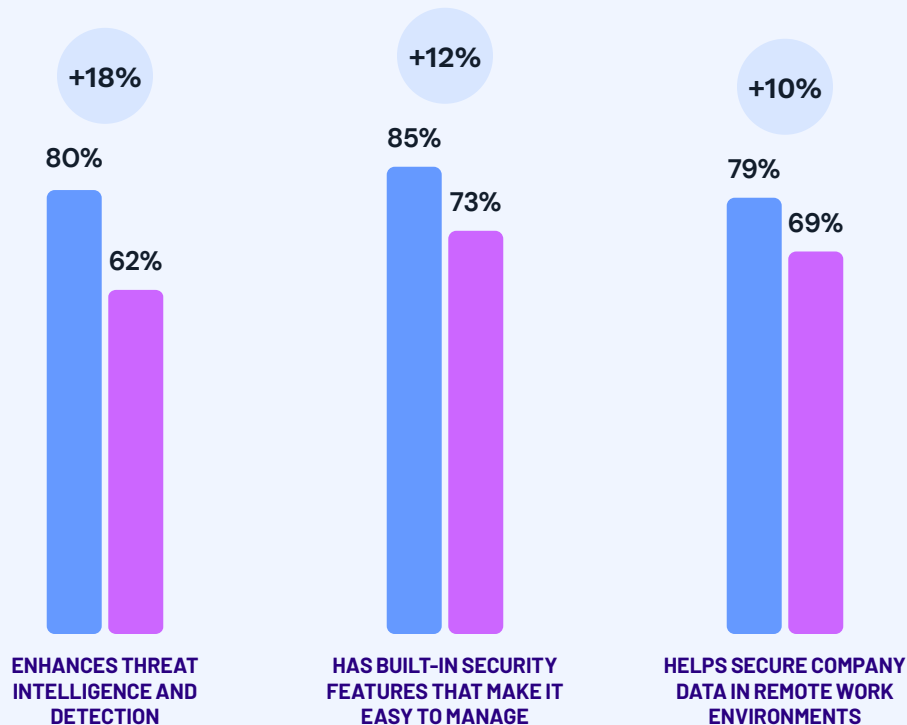|			
+11%	**+8%**	**+13%**	**+15%**
84% / 73%	84% / 76%	77% / 64%	77% / 62%
IMPROVES IT MANAGEABILITY THROUGH A CENTRALIZED SUITE	**MAXIMIZES EFFICIENCY BY REDUCING TIME SPENT ON ROUTINE IT TASKS**	**LOWERS OUR IT MANAGEMENT COSTS**	**REDUCES THE NEED FOR SUPPORT TICKETS TO PERFORM WORK**

Organizations with Workspace are more likely to realize security benefits. Workspace users specifically cite that Workspace enhances threat intelligence and detection, provides built–in security features, and helps to secure company data. Additionally, more Workspace organizations claim their number of security incidents have decreased in the last 24 months compared to M365 organizations (33% vs. 22%).

1-in-3

Google Workspace users claim the number of security incidents has decreased in the last 24 months

FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365

■ Workspace Users   ■ M365 Users

+18%

80%

62%

ENHANCES THREAT INTELLIGENCE AND DETECTION

+12%

85%

73%

HAS BUILT-IN SECURITY FEATURES THAT MAKE IT EASY TO MANAGE

+10%

79%

69%

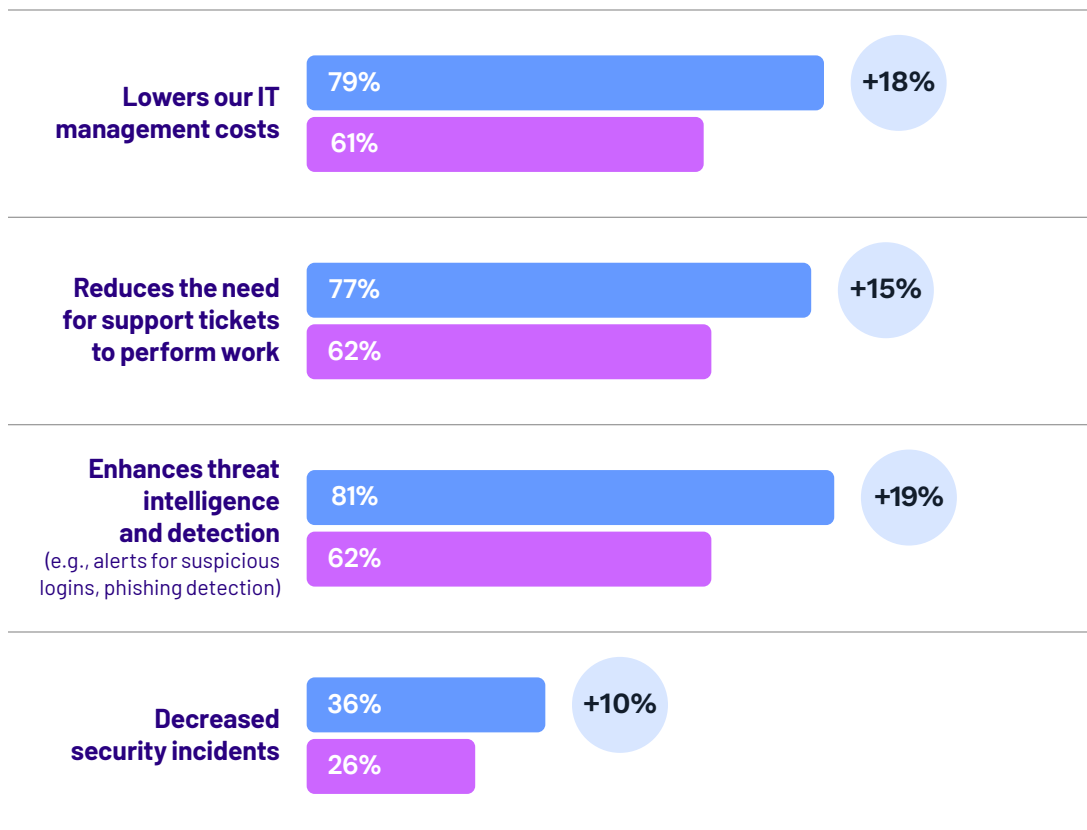**HELPS SECURE COMPANY DATA IN REMOTE WORK ENVIRONMENTS**

Enterprise organizations using Workspace are more likely to report benefits across IT and security. Compared to enterprise organizations using M365, enterprise organizations using Workspace more often claim lower IT costs and reduced need for IT tickets. Enterprise organizations using Workspace are more likely to report stronger security feature performance, including enhanced threat intelligence, and decreased security incidents.

BENEFITS: ENTERPRISE WORKSPACE USERS VS. M365 USERS

■ Workspace Users   ■ M365 Users

Lowers our IT management costs
- Workspace Users: 79%
- M365 Users: 61%
- +18%

Reduces the need for support tickets to perform work
- Workspace Users: 77%
- M365 Users: 62%
- +15%

Enhances threat intelligence and detection
(e.g., alerts for suspicious logins, phishing detection)
- Workspace Users: 81%
- M365 Users: 62%
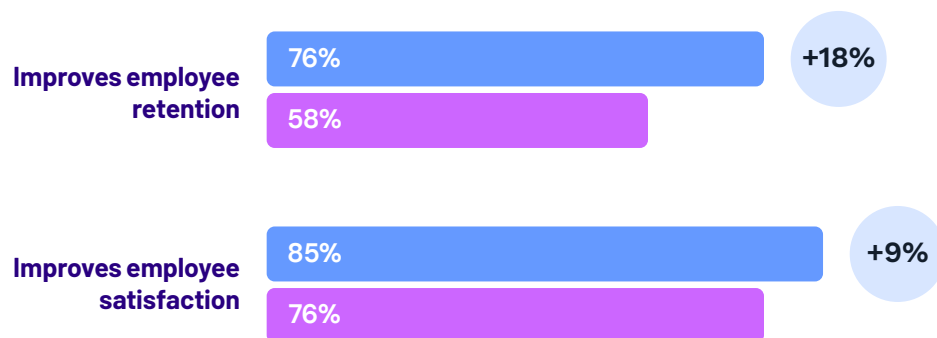- +19%

Decreased security incidents
- Workspace Users: 36%
- M365 Users: 26%
- +10%

3 Employee Satisfaction & Retention

Organizations that use Google Workspace claim that Workspace improves the employee experience, helping with retention and job satisfaction. ☉ **This trend is consistent in enterprise organizations.**
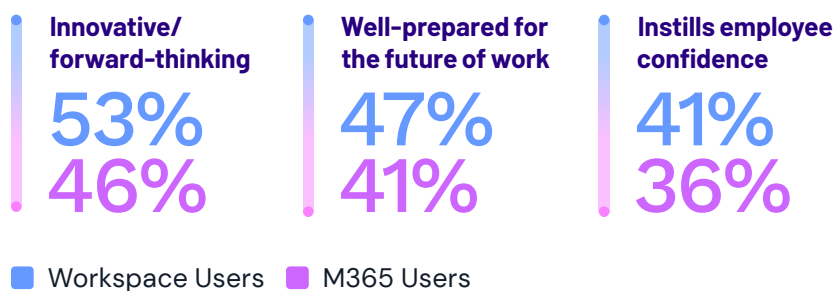
■ Workspace Users ■ M365 Users

Improves employee retention
- 76%
- 58%

+18%

Improves employee satisfaction
- 85%
- 76%

+9%

Organizations that use Workspace are more likely to believe they have a company culture that is **innovative or forward-thinking, well-prepared for the future of work, and instills employee confidence.**

WHICH OF THE FOLLOWING DESCRIBES YOUR COMPANY CULTURE?*

Innovative/ forward-thinking	Well-prepared for the future of work	Instills employee confidence
53%	47%	41%
46%	41%	36%

■ Workspace Users ■ M365 Users

*Among organizations with paid Google Workspace vs. organizations with paid Microsoft 365
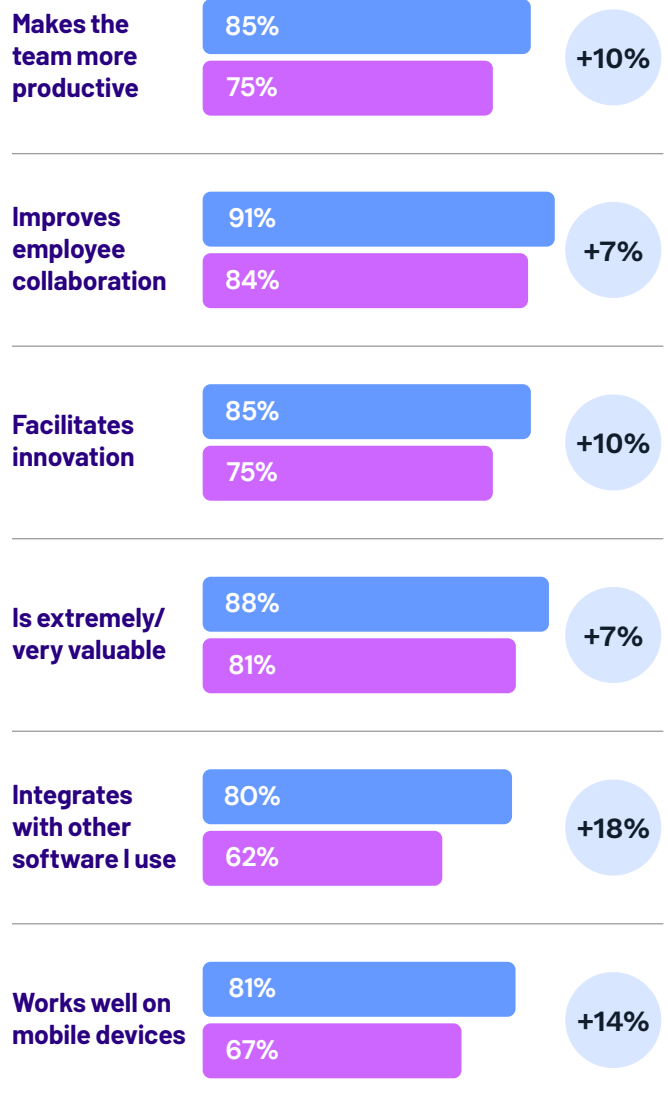
4 Employee Productivity & Business Growth

Google Workspace delivers clear benefits to organizations and their employees. Workspace users are more likely than Microsoft 365 users to report **higher productivity** among their teams. **Collaboration** is also a strength, with the survey showing nearly all Workspace users saying it improves how teams work together. And, Workspace users are more likely than M365 users to report that their productivity tool helps **facilitate innovation** and is **extremely/very valuable.**

Google Workspace shows notable advantages in how it integrates and works on mobile devices. Compared to M365 users, Workspace users are more likely to report strong **integration with other software** they use, as well as working well on **mobile devices.**

Indeed, Workspace users are more likely than M365 users to be conducting work on their smartphone (34% vs. 22%) and tablets (24% vs. 12%).

BENEFITS CLAIMED
AMONG WORKSPACE USERS VS. M365 USERS

■ Workspace Users   ■ M365 Users

Makes the team more productive
Workspace Users: 85%
M365 Users: 75%
+10%

Improves employee collaboration
Workspace Users: 91%
M365 Users: 84%
+7%

Facilitates innovation
Workspace Users: 85%
M365 Users: 75%
+10%

Is extremely/very valuable
Workspace Users: 88%
M365 Users: 81%
+7%

Integrates with other software I use
Workspace Users: 80%
M365 Users: 62%
+18%

Works well on mobile devices
Workspace Users: 81%
M365 Users: 67%
+14%

Among enterprise organizations, the differences are even more pronounced. Enterprise organizations using Workspace are more likely to report stronger outcomes across business benefits, with large gaps versus M365 on integrating with software used, working well on mobile devices, and improving employee satisfaction.

BENEFITS: ENTERPRISE WORKSPACE USERS VS. M365 USERS

🟦 Workspace Users   🟪 M365 Users

Integrates with other software I use
(e.g., Slack, CRM)

82%
59%
+23%

Works well on mobile devices

82%
66%
+16%

Improves employee satisfaction

85%
72%
+13%

Workspace users say Workspace enables employees to work more easily and quickly as compared to M365 users.

BENEFITS: WORKSPACE USERS VS. M365 USERS	GAP
Saves me time so I'm able to focus on my work	**+13%**
Is more than for just basic productivity tasks	**+9%**
Is intuitive/easy to use	**+9%**
Is easy to integrate into my workflow	**+6%**

In addition, organizations that have switched to Workspace are also more likely to say Workspace saves time (+6%) and is intuitive or easy to use (+6%), compared to those that have switched to M365.

Organizations that use Google Workspace are more likely to say they've **experienced increased annual revenue, headcount growth, and scaled up infrastructure.** Even more, they say that **Google Workspace played an important role** in these outcomes. This is also true for organizations that switched to Workspace.

% OF USERS WHO EXPERIENCED EVENT IN PAST 2 YEARS

INCREASED ANNUAL REVENUE	HEADCOUNT GROWTH	SCALED UP INFRASTRUCTURE OR TECH INVESTMENTS
66%	58%	56%
52%	42%	40%

% OF WORKSPACE USERS SAY WORKSPACE PLAYED AN IMPORTANT ROLE IN...

INCREASED ANNUAL REVENUE	HEADCOUNT GROWTH	SCALED UP INFRASTRUCTURE OR TECH INVESTMENTS
75%	67%	77%
(VS. 61% M365 USERS)	(VS. 48% M365 USERS)	(VS. 64% M365 USERS)

■ Workspace Users ■ M365 Users

Additional Details

Methodology

Survey Design

- Fielded June 16 – July 9, 2025
- 15 minutes
- Mobile optimized
- N=1,602 globally
    - United States (N=402)
    - United Kingdom, Germany, France, India, Japan, Brazil (N=200 each)

We spoke with 1,602 full–time employees aged 18+ across countries who use Google Workspace and/or Microsoft 365. We captured a mix of company sizes, manager status, industries, and departments.

		WORKSPACE USERS	M365 USERS
COMPANY SIZE	Small Business (5-99 employees)	15%	16%
	Medium/Mid-Market (100-999 employees)	39%	37%
	Enterprise (1000+ employees)	46%	47%
DECISION-MAKERS	Decision-Maker (Manager+ position)	86%	80%
	Individual Contributor (Non-Manager/Non-Decision-Maker)	14%	20%
INDUSTRY	Technology & Media	26%	23%
	Consulting, Legal, Architecture	3%	3%
	Manufacturing, Auto, Transportation/Logistics	14%	15%
	Retail, Food & Beverage	8%	8%
	Education, Government, Non-Profit	11%	12%
	Engineering, Energy, Telecom	6%	6%
	Banking, Financial, Insurance	9%	9%
	Healthcare & Pharmaceuticals	6%	6%
	Real Estate	1%	1%
	Other*	15%	15%
DEPARTMENT	IT/Security	44%	42%
	Line of Business	56%	58%
COUNTRY	United States	24%	25%
	United Kingdom	12%	12%
	Germany	12%	13%
	France	12%	12%
	India	15%	13%
	Japan	10%	13%
	Brazil	15%	13%

*Other, Agriculture, Construction, Facilities Management, Hospitality, Trade and Professional Services

End Notes

PAGE 4

Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Has AI features that provide value (not just hype)
– It improves employee retention
– It improves employee satisfaction

Q33 How confident do you feel in your ability to effectively integrate Google Gemini/Microsoft Copilot into your work today? Select one.

1. Very confident
2. Somewhat confident
3. Neither confident nor unconfident
4. Somewhat unconfident
5. Very unconfident

Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365...

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Lowers our IT management costs

Q46 Has the number of security incidents at your organization changed over the past 24 months?

– It has increased
– Stayed the same
– It has decreased
– Not sure

End Notes

Q5 When using Google Workspace/Microsoft 365, how would you rate your team's productivity on the following scale of 1–5?

1. 1 – Not productive
2. 2
3. 3 – Somewhat productive
4. 4
5. 5 – Very productive

Q13A Has your company gone through any of the following events in the past 2 years?

– Increased annual revenue

Q13B To what extent has Google Workspace/Microsoft 365 played a role in each of the following?

1. Critical role – it enabled the change, and the change would have been difficult without it
2. Important role – it played a key supporting role in making this change happen
3. Moderate role – helped indirectly but was not central
4. No meaningful role – it did not contribute to the change

– Increased annual revenue

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Q48 How would you rate the return on investment (ROI) for Googe Gemini/Microsoft Copilot at your company?

1. Very high ROI
2. High ROI
3. Moderate ROI
4. Low ROI
5. No ROI at all
6. Not sure

Q33 How confident do you feel in your ability to effectively integrate Google Gemini/ Microsoft Copilot into your work today? Select one.

1. Very confident
2. Somewhat confident
3. Neither confident nor unconfident
4. Somewhat unconfident
5. Very unconfident

End Notes

Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Has AI features that provide value (not just hype)
– It improves employee retention

Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365…

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Integrates with other software I use (e.g., Slack, CRM)
– Lowers our IT management costs

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Q47 Which of the following describes your company's perspective on the adoption of generative AI technologies (e.g., GenAI, automation, machine learning) at work?

1. Actively driving generative AI adoption across multiple functions
2. Encouraging generative AI adoption, but only in certain areas or departments
3. Exploring generative AI options, but not yet fully committed
4. Generative AI adoption is not a current priority
5. The company is not pursuing generative AI adoption at all

Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Has AI features that provide value (not just hype)

End Notes

Q48 How would you rate the return on investment (ROI) for Googe Gemini/Microsoft Copilot at your company?

1. Very high ROI
2. High ROI
3. Moderate ROI
4. Low ROI
5. No ROI at all
6. Not sure

Q53 Please indicate how much you agree or disagree with the following statements when it comes to using Googe Gemini/Microsoft Copilot at your work?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Is useful for real, everyday users like me

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Q33 How confident do you feel in your ability to effectively integrate Google Gemini/ Microsoft Copilot into your work today? Select one.

1. Very confident
2. Somewhat confident
3. Neither confident nor unconfident
4. Somewhat unconfident
5. Very unconfident

Q32 What are the benefits, if any, of using Google Gemini/Microsoft Copilot at work?

– Makes me more confident in my work

Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365…

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

End Notes

- – Helps with deep research by using generative AI
- – Organizes data with generative AI
- – Leverages generative AI to create and summarize text or images
- – Helps with automating repetitive tasks by using generative AI
- – Increases productivity with generative AI
- – Unlocks creativity more easily with generative AI
- – Facilitates quick learning with generative AI
- – Supports complex work using generative AI (e.g., analysis, coding, technical writing)
- – Unlocks knowledge more easily with generative AI

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Q53 Please indicate how much you agree or disagree with the following statements when it comes to using Googe Gemini/Microsoft Copilot at your work?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

- – Makes me value artificial intelligence (AI) more
- – It is easy to integrate into my workflow
- – Is accessible and easy to use on both desktop and mobile devices
- – Is useful for real, everyday users like me
- – Is for more than just basic productivity tasks
- – Demonstrates the value of generative AI
- – Has strong security and privacy protection
- – Is intuitive to use
- – Increases innovation at my company
- – Increases employee collaboration

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Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365...

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

End Notes

- – Improves IT manageability through a centralized suite, reducing reliance on multiple vendors/software tools
- – Maximizes efficiency by reducing time spent on routine IT tasks (e.g., built-in tools, automatic updates, real-time usage monitoring)
- – Lowers our IT management costs
- – Reduces the need for support tickets to perform work

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Q46 Has the number of security incidents at your organization changed over the past 24 months?

- – It has increased
- – Stayed the same
- – It has decreased
- – Not sure

Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365...

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

- – Enhances threat intelligence and detection (e.g., alerts for suspicious logins, phishing detection)
- – Has built-in security features that make it easy to manage (i.e. do not need additional third-party tools)
- – Helps secure company data in remote work environments (i.e., VPN, endpoint protection)

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Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365...

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

End Notes

–   Lowers our IT management costs
–   Reduces the need for support tickets to perform work
–   Enhances threat intelligence and detection
    (e.g., alerts for suspicious logins, phishing detection)

Q46 Has the number of security incidents at your organization changed over the past 24 months?

–   It has increased
–   Stayed the same
–   It has decreased
–   Not sure

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Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

–   It improves employee retention
–   It improves employee satisfaction

Q56 Which of the following terms describes your company's overall culture?

–   Innovative/forward–thinking
–   Well–prepared for the future of work (e.g. technological advancements)
–   Instills employee confidence

PAGE 13 & 14

Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

–   It improves employee collaboration

End Notes

Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365…

1.   Strongly agree
2.   Somewhat agree
3.   Neutral
4.   Somewhat disagree
5.   Strongly disagree

–   Facilitates innovation
–   Integrates with other software I use (e.g., Slack, CRM)
–   Works well on mobile devices

Q41 How would you rate the overall value for the money of Google Workspace/ Microsoft 365?

1.   Extremely valuable
2.   Very valuable
3.   Somewhat valuable
4.   Not very valuable
5.   Not valuable at all

Q6 When you/your company uses Google Workspace/Microsoft 365 at work, which devices are you primarily using to complete tasks?

1.   Smartphone
2.   Tablet

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Q15 Please indicate how much you agree or disagree with the following statements. Google Workspace/Microsoft 365…

1.   Strongly agree
2.   Somewhat agree
3.   Neutral
4.   Somewhat disagree
5.   Strongly disagree

–   Saves me time so I'm able to focus on my work

End Notes

Q42 Please indicate how much you agree or disagree with the following statements for Google Workspace/Microsoft 365?

1. Strongly agree
2. Somewhat agree
3. Neutral
4. Somewhat disagree
5. Strongly disagree

– Is for more than just basic productivity tasks
– Is intuitive/easy to use
– It is easy to integrate into my workflow

Q13A Has your company gone through any of the following events in the past 2 years?

– Increased annual revenue
– Headcount growth
– Scaled up infrastructure or technology investments

Q13B To what extent has Google Workspace/Microsoft 365 played a role in each of the following?

1. Critical role – it enabled the change, and the change would have been difficult without it
2. Important role – it played a key supporting role in making this change happen
3. Moderate role – helped indirectly but was not central
4. No meaningful role – it did not contribute to the change

– Increased annual revenue
– Headcount growth
– Scaled up infrastructure or technology investments

Additional Data

AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	WORKSPACE	M365	% GAP FOR TOTAL
Helps with deep research by using generative AI	**81%**	**59%**	**+22%**
Organizes data with generative AI	**83%**	**62%**	**+21%**
Leverages generative AI to create and summarize text or images	**82%**	**62%**	**+20%**
Helps with automating repetitive tasks by using generative AI	**84%**	**64%**	**+20%**
Increases productivity with generative AI	**84%**	**66%**	**+18%**
Unlocks creativity more easily with generative AI	**80%**	**62%**	**+18%**
Facilitates quick learning with generative AI	**80%**	**62%**	**+18%**
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	**82%**	**64%**	**+18%**
Unlocks knowledge more easily with generative AI	**81%**	**63%**	**+18%**

AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 USERS – INDIVIDUAL CONTRIBUTORS (Strongly/somewhat agree)	WORKSPACE	M365	% GAP FOR ICs
Helps with deep research by using generative AI	**65%**	**37%**	**+28%**
Organizes data with generative AI	**67%**	**37%**	**+30%**
Leverages generative AI to create and summarize text or images	**65%**	**39%**	**+26%**
Helps with automating repetitive tasks by using generative AI	**67%**	**39%**	**+28%**
Increases productivity with generative AI	**68%**	**44%**	**+24%**
Unlocks creativity more easily with generative AI	**67%**	**40%**	**+27%**
Facilitates quick learning with generative AI	**63%**	**44%**	**+19%**
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	**62%**	**42%**	**+20%**
Unlocks knowledge more easily with generative AI	**68%**	**41%**	**+27%**

Additional Data

AI FEATURE PERFORMANCE: ENTERPRISE WORKSPACE USERS VS. ENTERPRISE M365 USERS (Strongly/somewhat agree)	WORKSPACE	M365	% GAP
Helps with deep research by using generative AI	**85%**	**59%**	**+26%**
Organizes data with generative AI	**86%**	**66%**	**+20%**
Leverages generative AI to create and summarize text or images	**86%**	**64%**	**+22%**
Helps with automating repetitive tasks by using generative AI	**85%**	**66%**	**+19%**
Increases productivity with generative AI	**88%**	**66%**	**+22%**
Unlocks creativity more easily with generative AI	**84%**	**62%**	**+21%**
Facilitates quick learning with generative AI	**85%**	**64%**	**+21%**
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	**86%**	**65%**	**+21%**
Unlocks knowledge more easily with generative AI	**84%**	**63%**	**+21%**

AI FEATURE PERFORMANCE: ORGANIZATIONS THAT SWITCHED TO WORKSPACE VS. ORGANIZATIONS THAT SWITCHED TO M365	WORKSPACE	M365	% GAP
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	**49%**	**35%**	**+14%**
Unlocks knowledge more easily with generative AI	**49%**	**36%**	**+13%**

AI BENEFITS: ORGANIZATIONS THAT SWITCHED TO WORKSPACE & USE GEMINI VS. ORGANIZATIONS THAT SWITCHED TO M365 & USE COPILOT (Strongly agree)	GEMINI	COPILOT	% GAP
Very high/high return on investment	**60%**	**47%**	**+13%**
Very confident I can effectively integrate into my work	**61%**	**46%**	**+15%**

Additional Data

% AGREE WITH STATEMENTS ABOUT GOOGLE GEMINI VS. MICROSOFT COPILOT (Strongly agree)	GEMINI	COPILOT	% GAP FOR TOTAL
Makes me value artificial intelligence (AI) more	49%	36%	+13%
It is easy to integrate into my workflow	49%	37%	+12%
Is accessible and easy to use on both desktop and mobile devices	49%	39%	+10%
Is useful for real, everyday users like me	53%	43%	+10%
Is for more than just basic productivity tasks	48%	38%	+10%
Demonstrates the value of generative AI	46%	36%	+10%
Has strong security and privacy protection	46%	36%	+10%
Is intuitive to use	48%	39%	+9%
Increases innovation at my company	47%	38%	+9%
Increases employee collaboration	46%	37%	+9%

% AGREE WITH STATEMENTS ABOUT GOOGLE GEMINI VS. MICROSOFT COPILOT – INDIVIDUAL CONTRIBUTORS (Strongly agree)	GEMINI	COPILOT	% GAP FOR ICs
Makes me value artificial intelligence (AI) more	39%	20%	+19%
It is easy to integrate into my workflow	35%	24%	+11%
Is accessible and easy to use on both desktop and mobile devices	35%	23%	+12%
Is useful for real, everyday users like me	50%	29%	+21%
Is for more than just basic productivity tasks	43%	30%	+12%
Demonstrates the value of generative AI	35%	23%	+12%
Has strong security and privacy protection	39%	22%	+17%
Is intuitive to use	46%	26%	+20%
Increases innovation at my company	35%	19%	+16%
Increases employee collaboration	35%	21%	+14%

Additional Data

BENEFITS: ENTERPRISE WORKSPACE USERS VS. ENTERPRISE M365 USERS (Strongly/somewhat agree)	WORKSPACE	M365	% GAP
It improves employee satisfaction	85%	72%	+13%
It improves employee retention	87%	75%	+12%

BENEFITS: WORKSPACE USERS VS. M365 USERS (Strongly agree)	WORKSPACE	M365	% GAP
Saves me time so I'm able to focus on my work	52%	39%	+13%
Is more than for just basic productivity tasks	46%	37%	+9%
Is intuitive/easy to use	47%	38%	+9%
Is easy to integrate into my workflow	46%	41%	+5%

BENEFITS: ORGANIZATIONS THAT SWITCHED TO WORKSPACE VS. ORGANIZATIONS THAT SWITCHED TO M365 (Strongly agree)	WORKSPACE	M365	% GAP
Saves me time so I'm able to focus on my work	56%	50%	+6%
Is intuitive/easy to use	51%	45%	+6%

IMPACT ON BUSINESS: ORGANIZATIONS THAT SWITCHED TO WORKSPACE VS. ORGANIZATIONS THAT SWITCHED TO M365	WORKSPACE	M365	% GAP
% OF USERS WHO EXPERIENCED EVENT IN PAST 2 YEARS			
Increased annual revenue	71%	63%	+8%
Headcount growth	62%	47%	+15%
Scaled up infrastructure/tech	61%	51%	+10%
% OF USERS SAY WORKSPACE/M365 PLAYED AN IMPORTANT ROLE IN…			
Increased annual revenue	82%	71%	+11%
Headcount growth	74%	63%	+11%
Scaled up infrastructure/tech	81%	71%	+10%