

Google Workspace vs. Microsoft 365

Why the choice of AI tools matter

GLOBAL AI INSIGHTS

hypothesis

Google Workspace

JANUARY 2026

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, Google Workspace or Microsoft 365. **This report focuses specifically on AI features, usage, and outcomes in the workplace, inclusive of both Google Gemini and Microsoft Copilot.**

The 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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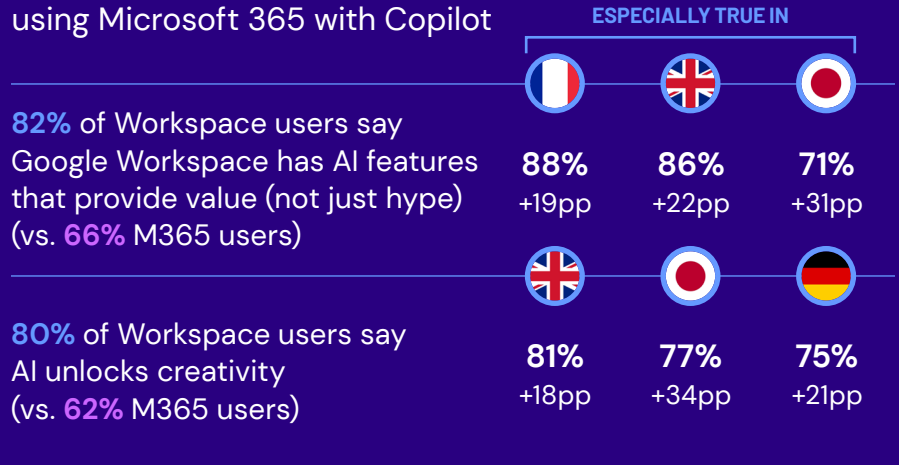
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Key Findings (1 of 2)

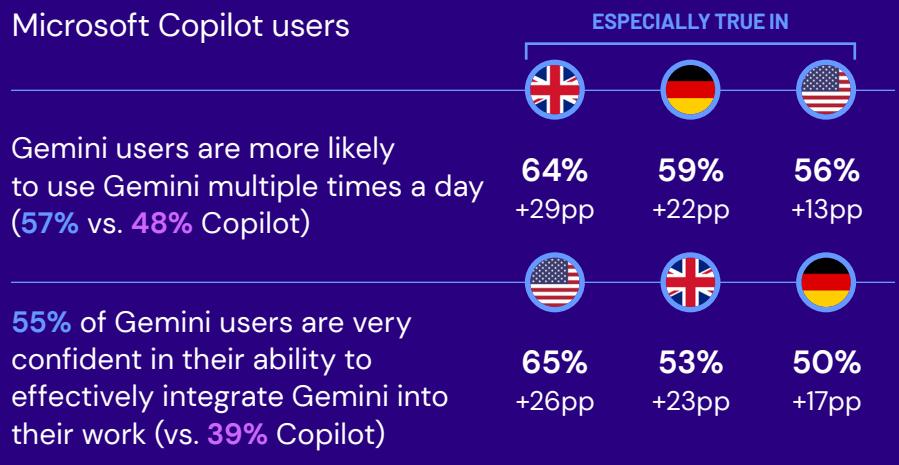
Value of AI Features

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



AI Usage & Confidence

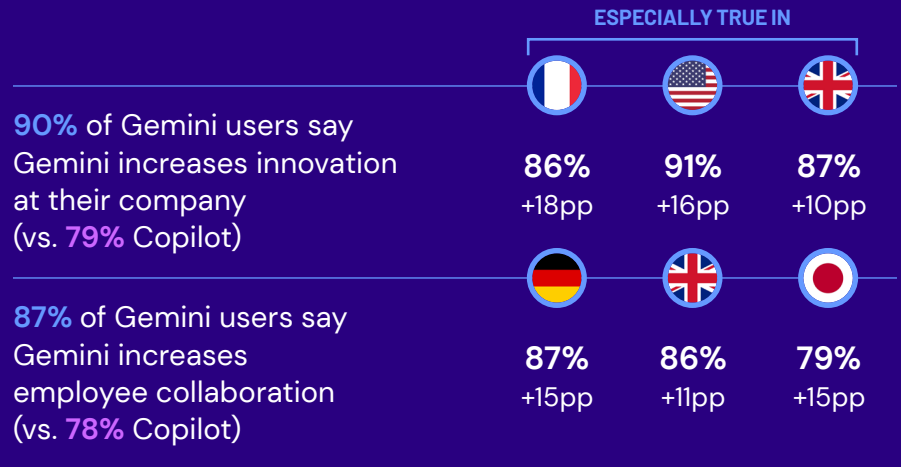
Organizations using Google Gemini are more frequent and confident AI users versus Microsoft Copilot users



Key Findings (2 of 2)

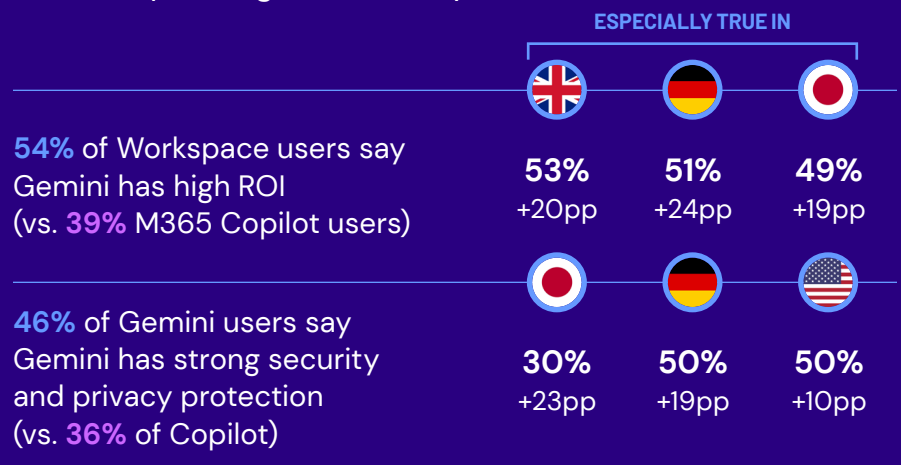
Employee Innovation and Efficiency

Organizations using Gemini experience more benefits around innovation and efficiency versus those using Copilot



Impact on Business Outcomes

Gemini organizations have stronger ROI, positive impact on business planning, and security



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



Individual contributors

Individual contributors (non-decision-makers) who use Google Gemini are more likely to report a variety of benefits from Gemini (vs. Copilot).

Google Gemini users are more likely to say **Gemini increases collaboration and creativity**:

- 81% say Gemini improves collaboration (+19pp)
- 67% say AI unlocks creativity (+27pp)

Among individual contributors who use Gemini, their **frequency of usage and confidence in integrating it into their workflow** is higher than individual contributors using Copilot:

- 46% say they use Gemini multiple times a day (+12pp)
- 46% report confidence integrating Gemini into work (+28pp)



Enterprise organizations

Among organizations with 1,000+ employees, Google Gemini performs stronger than Microsoft Copilot on providing value, increasing innovation, and ROI.

- 85% of enterprise orgs using Workspace say that its "AI features provide value, not just hype" (+19pp)
- 60% of enterprise orgs using Gemini say it has high ROI (+20pp)

Enterprise organizations that use Workspace with Gemini are also more likely to report that they are using Gemini to **build or interact with AI agents and that Gemini has strong security** (vs. enterprise organizations using M365 Copilot):

- 37% say they are building or interacting with AI agents with Gemini (+13pp)
- 48% say Gemini has strong security and privacy protection (+14pp)

1 Value of AI Features


Adoption of AI within organizations has grown rapidly. Across all markets surveyed, over 80% are adopting or exploring AI technologies for their organizations.

Organizations with Google Workspace are more likely than organizations with Microsoft 365 to say they are driving AI adoption across multiple functions and experiencing benefits from it.

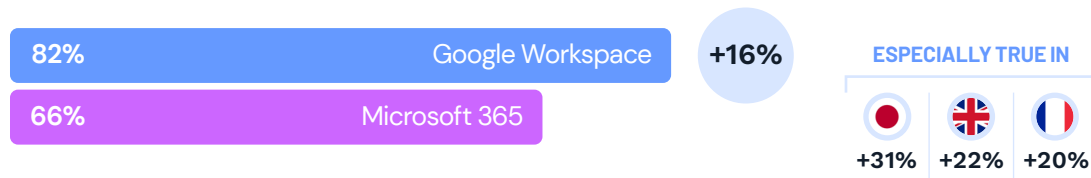
44% of Workspace users say they've actively deployed AI across multiple functions, compared to 37% of M365 users.*

And, 82% of Workspace users say the apps have "AI features that provide value (not just hype)" compared to 66% of M365 users (+16%).

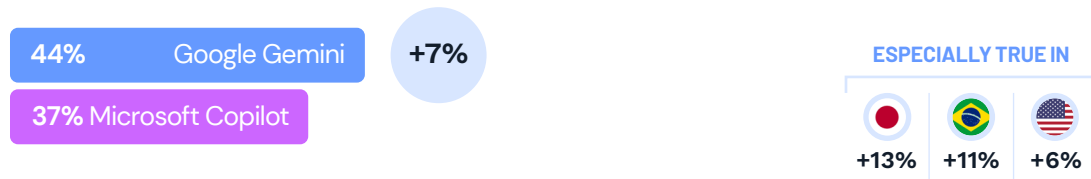


-  The majority of enterprise organizations using Workspace also report that Workspace offers AI features that provide value (85%), far more than enterprise organizations using M365 (66%).

"AI features provide value (not just hype)"






Actively deploying AI across multiple functions*



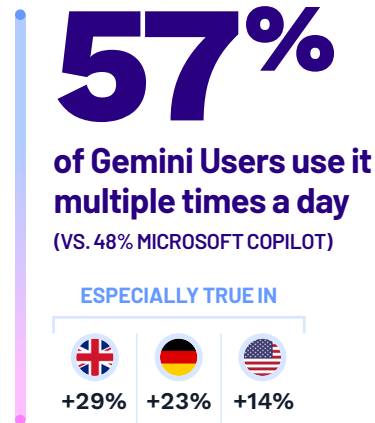
*Among organizations with paid Google Workspace vs. organizations with paid Microsoft 365

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 in countries such as Japan, Germany, and the UK. 🙌🤖 **This trend also holds true for individual contributors and in enterprise organizations.**

AI FEATURE PERFORMANCE GAP: GOOGLE WORKSPACE VS. MICROSOFT 365	TOTAL	ESPECIALLY TRUE IN		
				
Helps with deep research by using generative AI	+22%	+31%	+24%	+30%
Organizes data with generative AI	+21%	+29%	+32%	+24%
Leverages generative AI to create and summarizes text or images	+20%	+27%	+32%	+24%
Helps with automating repetitive tasks by using generative AI	+20%	+30%	+36%	+19%
Increases productivity with generative AI	+18%	+23%	+31%	+21%
Unlocks creativity more easily with generative AI	+18%	+34%	+21%	+18%
Facilitates quick learning with generative AI	+18%	+30%	+21%	+24%
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	+18%	+29%	+25%	+16%
Unlocks knowledge more easily with generative AI	+18%	+21%	+22%	+19%

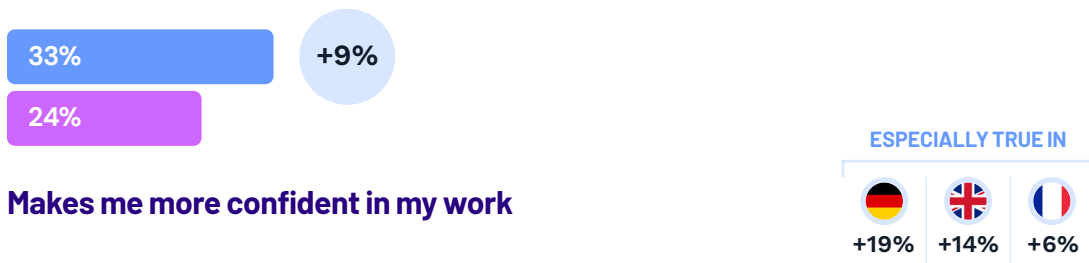
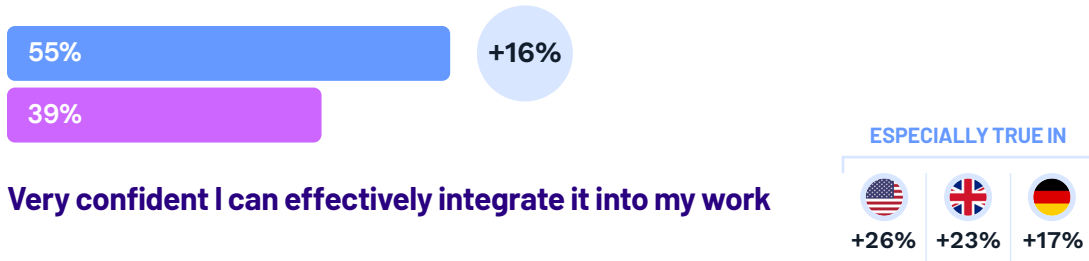
2 AI Usage and Confidence

The survey shows that Google Gemini is used more frequently than Microsoft Copilot. 57% of Gemini users report they use Gemini multiple times a day compared to 48% of Microsoft Copilot users. And, 40% of Gemini users say Gemini makes it easier to become familiar with AI, versus 32% of Copilot users.



Moreover, Google Gemini boosts confidence more than Microsoft Copilot.

- Gemini Users
- Copilot Users



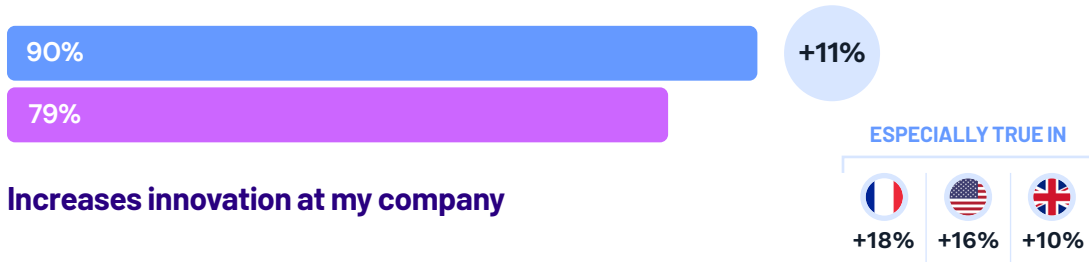
- The confidence in effectively integrating Gemini into their work is especially true for individual contributors (+28%) and enterprise organizations (+19%).

3 Employee Innovation and Efficiency

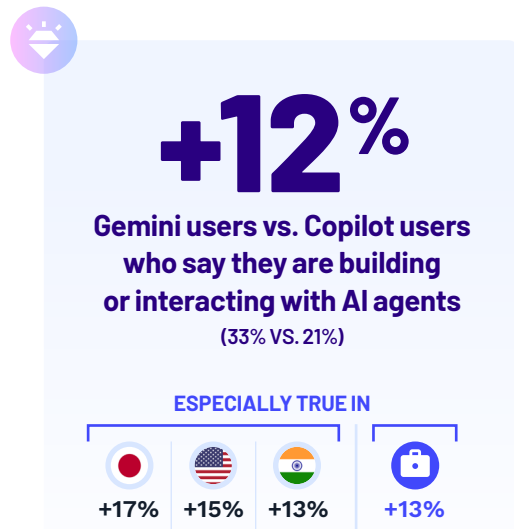
Organizations with Gemini are more likely to be using it to drive innovation within their organization. Gemini users specifically cite that Gemini increases innovation and identifies GenAI opportunities at their company.

INNOVATION METRICS: GOOGLE GEMINI VS. MICROSOFT COPILOT


■ Gemini Users ■ Copilot Users



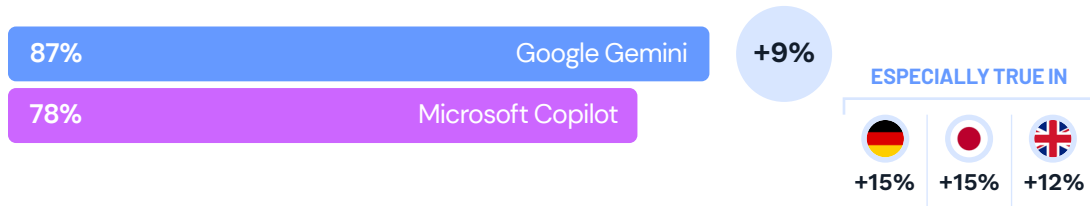
Additionally, more Workspace with Gemini organizations state they are **building or interacting with AI agents** with Gemini versus Copilot users.



Gemini also supports efficiency by helping to increase collaboration. 87% of Gemini users say Gemini increases employee collaboration, versus 78% of Copilot users (+9%).

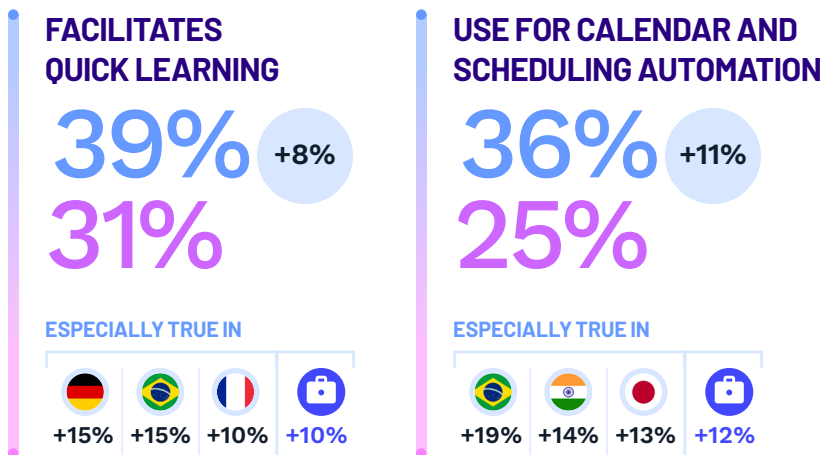
 Gemini increasing collaboration is even stronger for individual contributors (+19%) and enterprise organizations (+10%).

Increases employee collaboration



Gemini users are also more likely to say that Gemini **facilitates quick learning** and that they're able to use Gemini for **calendar and scheduling automation**.

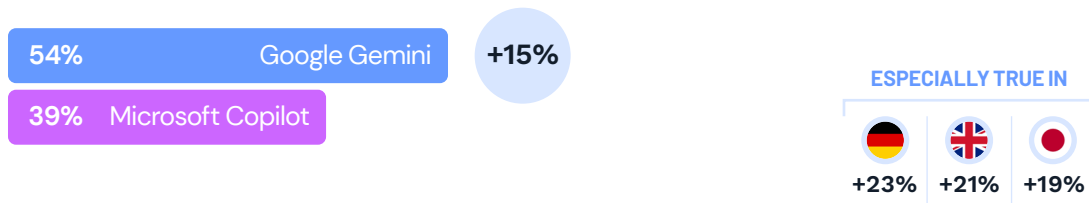
■ Gemini Users ■ Copilot Users



4 Impact on Business Outcomes

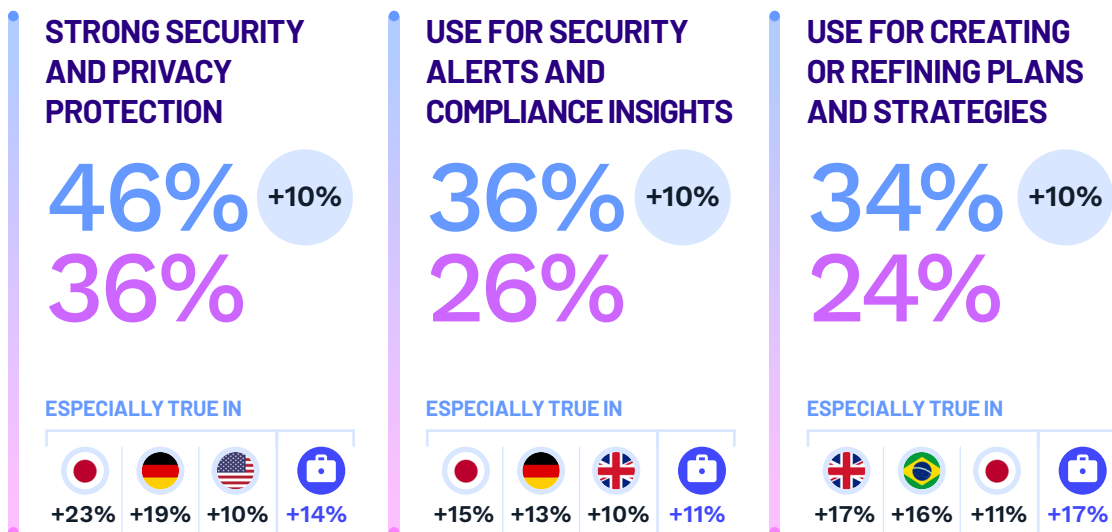
Gemini users report greater return on investment from Gemini vs. Microsoft Copilot users. 🛡️ This trend is consistent in enterprise organizations (+20%).

Very high/high return on investment



Organizations that use Gemini are more likely to cite that Gemini has a positive impact on security and business planning.

■ Gemini Users ■ Copilot Users



Additional Details

APPENDIX A

Methodology

APPENDIX B

End Notes

APPENDIX C

Additional Data



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

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

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
- Unlocks creativity more easily with generative AI

Q49 How often do employees at your company use Google Gemini/Microsoft Copilot at work? Select one.

1. Multiple times a day
2. Once a day
3. Multiple times during the week
4. Only once per week
5. Less than once per week
6. Don't know

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

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

1. Strongly agree
 2. Somewhat agree
 3. Neutral
 4. Somewhat disagree
 5. Strongly disagree
- Increases innovation at my company
 - Increases employee collaboration
 - Has strong security and privacy protection

Q48 How would you rate the return on investment (ROI) for Google 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

Q52 How do employees at your company currently use Google Gemini/Microsoft Copilot at work? Select all that apply.

- Building or interacting with AI agents

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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

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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
- 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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Q49 How often do employees at your company use Google Gemini/Microsoft Copilot at work? Select one.

1. Multiple times a day
2. Once a day
3. Multiple times during the week
4. Only once per week
5. Less than once per week
6. Don't know

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

End Notes

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Q52 How do employees at your company currently use Google Gemini/Microsoft Copilot at work? Select all that apply.

- Building or interacting with AI agents

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

1. Strongly agree
 2. Somewhat agree
 3. Neutral
 4. Somewhat disagree
 5. Strongly disagree
- Increases innovation at my company
 - Identifies generative AI opportunities for my company

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

1. Strongly agree
 2. Somewhat agree
 3. Neutral
 4. Somewhat disagree
 5. Strongly disagree
- Increases employee collaboration

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

- Facilitates quick learning

Q52 How do employees at your company currently use Google Gemini/Microsoft Copilot at work? Select all that apply.

- Calendar and scheduling automation

End Notes

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


1. Strongly agree
 2. Somewhat agree
 3. Neutral
 4. Somewhat disagree
 5. Strongly disagree
- Has strong security and privacy protection

Q52 How do employees at your company currently use Google Gemini/Microsoft Copilot at work? Select all that apply.

- Creating or refining plans and strategies (e.g., quarterly/annual business plan, project roadmaps)
- Security alerting and compliance insights using AI

Additional Data

PAGE 7 VALUE OF AI FEATURES: GOOGLE WORKSPACE VS. MICROSOFT 365

AI features provide value (not just hype)				Actively deploying AI across multiple functions			
	WORKSPACE	M365	% GAP		PAID WORKSPACE	PAID M365	% GAP
Japan	71%	40%	+31%	Japan	49%	36%	+13%
United Kingdom	86%	64%	+22%	Brazil	59%	48%	+11%
France	88%	68%	+20%	United States	37%	31%	+6%
 Enterprise	85%	66%	+19%				

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AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	GLOBAL TOTAL		
	WORKSPACE	M365	% GAP
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%

Additional Data

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AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	JAPAN		
	WORKSPACE	M365	% GAP
Helps with deep research by using generative AI	75%	44%	+31%
Organizes data with generative AI	77%	48%	+29%
Leverages generative AI to create and summarize text or images	79%	52%	+27%
Helps with automating repetitive tasks by using generative AI	81%	51%	+30%
Increases productivity with generative AI	83%	60%	+23%
Unlocks creativity more easily with generative AI	77%	43%	+34%
Facilitates quick learning with generative AI	76%	46%	+30%
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	72%	43%	+29%
Unlocks knowledge more easily with generative AI	78%	57%	+21%

AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	GERMANY		
	WORKSPACE	M365	% GAP
Helps with deep research by using generative AI	81%	57%	+24%
Organizes data with generative AI	83%	51%	+32%
Leverages generative AI to create and summarize text or images	84%	52%	+32%
Helps with automating repetitive tasks by using generative AI	87%	51%	+36%
Increases productivity with generative AI	88%	57%	+31%
Unlocks creativity more easily with generative AI	75%	54%	+21%
Facilitates quick learning with generative AI	76%	55%	+21%
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	81%	56%	+25%
Unlocks knowledge more easily with generative AI	76%	54%	+22%

Additional Data

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AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	UNITED KINGDOM		
	WORKSPACE	M365	% GAP
Helps with deep research by using generative AI	80%	50%	+30%
Organizes data with generative AI	79%	55%	+24%
Leverages generative AI to create and summarize text or images	77%	53%	+24%
Helps with automating repetitive tasks by using generative AI	80%	61%	+19%
Increases productivity with generative AI	83%	62%	+21%
Unlocks creativity more easily with generative AI	81%	63%	+18%
Facilitates quick learning with generative AI	85%	61%	+24%
Supports complex work using generative AI (e.g., analysis, coding, technical writing)	77%	61%	+16%
Unlocks knowledge more easily with generative AI	79%	60%	+19%


AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	INDIVIDUAL CONTRIBUTORS		
	WORKSPACE	M365	% GAP
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

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AI FEATURE PERFORMANCE: GOOGLE WORKSPACE VS. MICROSOFT 365 (Strongly/somewhat agree)	ENTERPRISE ORGANIZATIONS		
	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%	+22%
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%

PAGE 9 AI USAGE: GOOGLE GEMINI VS. MICROSOFT COPILOT

Use multiple times a day	GEMINI	COPILOT	% GAP
United Kingdom	64%	35%	+29%
Germany	59%	36%	+23%
United States	56%	42%	+14%
 Individual Contributors	46%	34%	+12%


Additional Data

PAGE 9 AI CONFIDENCE: GOOGLE GEMINI VS. MICROSOFT COPILOT

Very confident I can effectively integrate it into my work			
	GEMINI	COPILOT	% GAP
United States	65%	39%	+26%
United Kingdom	53%	30%	+23%
Germany	50%	33%	+17%
 Individual Contributors	46%	18%	+28%
 Enterprise Organizations	57%	38%	+19%

Makes me more confident in my work			
	GEMINI	COPILOT	% GAP
Germany	29%	10%	+19%
United Kingdom	37%	23%	+14%
France	25%	19%	+6%

PAGE 10 EMPLOYEE INNOVATION: GOOGLE GEMINI VS. MICROSOFT COPILOT

Use to build or interact with agents			
	GEMINI	COPILOT	% GAP
Japan	33%	16%	+17%
United States	31%	16%	+15%
India	40%	27%	+13%
 Enterprise Organizations	37%	24%	+13%



Additional Data

PAGE 10 EMPLOYEE INNOVATION: GOOGLE GEMINI VS. MICROSOFT COPILOT

Increases innovation at my company			
	GEMINI	COPILOT	% GAP
France	86%	68%	+18%
United States	91%	75%	+16%
United Kingdom	87%	77%	+10%


Identifies generative AI opportunities for my company			
	GEMINI	COPILOT	% GAP
United Kingdom	89%	64%	+25%
France	85%	64%	+21%
Japan	70%	52%	+18%


PAGE 11 EMPLOYEE EFFICIENCY: GOOGLE GEMINI VS. MICROSOFT COPILOT

Increases employee collaboration			
	GEMINI	COPILOT	% GAP
Germany	87%	72%	+15%
Japan	79%	64%	+15%
United Kingdom	86%	74%	+12%
 Individual Contributors	81%	62%	+19%
 Enterprise Organizations	89%	79%	+10%


Additional Data

PAGE 11 EMPLOYEE EFFICIENCY: GOOGLE GEMINI VS. MICROSOFT COPILOT

Facilitates quick learning			
	GEMINI	COPILOT	% GAP
Germany	41%	26%	+15%
Brazil	46%	31%	+15%
France	32%	22%	+10%
 Enterprise Organizations	41%	31%	+10%


Use for calendar and scheduling automation			
	GEMINI	COPILOT	% GAP
Brazil	43%	24%	+19%
India	40%	26%	+14%
Japan	34%	21%	+13%
 Enterprise Organizations	39%	27%	+12%


PAGE 12 IMPACT ON BUSINESS OUTCOMES: GOOGLE GEMINI VS. MICROSOFT COPILOT


Very high/ high return on investment			
	GEMINI	COPILOT	% GAP
Germany	51%	28%	+23%
UK	53%	32%	+21%
Japan	49%	30%	+19%
 Enterprise Organizations	60%	40%	+20%

Additional Data

PAGE 12 IMPACT ON BUSINESS OUTCOMES: GOOGLE GEMINI VS. MICROSOFT COPILOT

Strong security and privacy protection			
	GEMINI	COPILOT	% GAP
Japan	30%	7%	+23%
Germany	50%	31%	+19%
US	50%	40%	+10%
 Enterprise Organizations	48%	34%	+14%

Use for security alerts and compliance insights			
	GEMINI	COPILOT	% GAP
Japan	35%	20%	+15%
Germany	29%	16%	+13%
UK	33%	23%	+10%
 Enterprise Organizations	39%	28%	+11%

Use for creating or refining plans and strategies			
	GEMINI	COPILOT	% GAP
UK	37%	20%	+17%
Brazil	41%	25%	+16%
Japan	26%	15%	+11%
 Enterprise Organizations	38%	21%	+17%