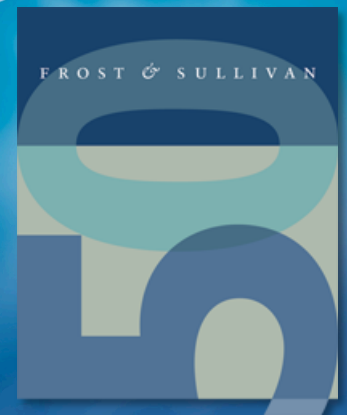


State of the Google Apps Ecosystem

Frost & Sullivan in Conjunction with
the Cloud Alliance for Google Apps



February 2014

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Source: Frost & Sullivan

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Source: Frost & Sullivan

Research Objectives and Methodology

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Research Objectives

Overall, identify trends in usage and satisfaction with Google Apps and the successful adoption of a cloud-based infrastructure with the help of third-party applications.

Specifically the objectives are as follows:

- Identify trends and areas for growth in the adoption of the Google Apps Marketplace.
- Determine how third-party applications can facilitate the successful implementation of the Google Apps suite and address challenges associated with maintaining a cloud infrastructure.
- Highlight the factors which impact overall satisfaction and usage rates of Google Apps and third-party applications.
- Examine challenges which IT administrators face when migrating users to Google Apps, particularly from Microsoft products.
- Review trends in the growth of *bring-your-own-device* policies to facilitate movement towards a mobile workforce.

Source: Frost & Sullivan

Methodology

Interviews were completed online between December 2013 and January 2014. Detailed analytics were compiled using factor analysis and binary logistic regression analysis.

Sample Description

1,158 interviews were completed, with specific subsamples of user segments as follows:

- Administrators, IT: 455
- Administrators, non-IT: 283
- End users: 420

Reporting Notes

Due to rounding errors, percentages in charts and tables may not sum to 100.

Source: Frost & Sullivan

Executive Summary

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After an average of more than two years on Google Apps, 89% of users are satisfied.

Of these users, 60% say that their already high satisfaction with Google Apps has increased since their initial adoption.

Very satisfied with Google Apps 53%

Somewhat satisfied with Google Apps 36%

To complement their positive Google Apps experience, users look to third-party applications. In particular, they are driven to those that are reliable, easy to use, secure, relevant, and well integrated with other apps in the ecosystem.

% of respondents who cite these drivers as very important to their satisfaction

Relevance 62%

Reliability 55%

Ease of use 51%

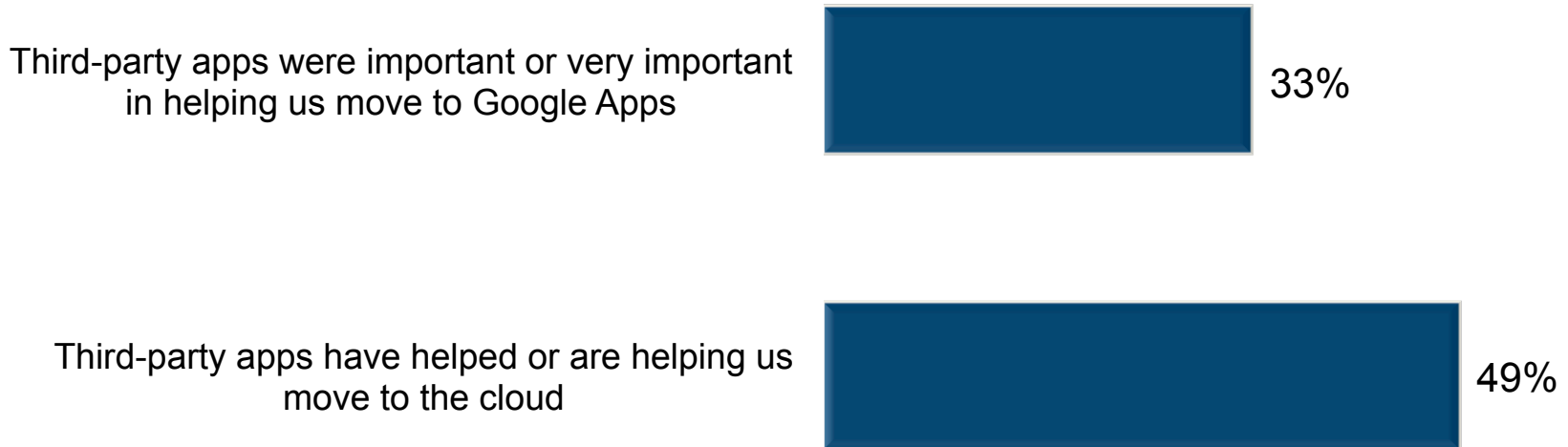
Integrated capabilities 51%

Security 50%

Source: Frost & Sullivan

Having successfully moved to Google Apps, 49% of admins are still using third-party apps to assist in their complete adoption of the cloud.

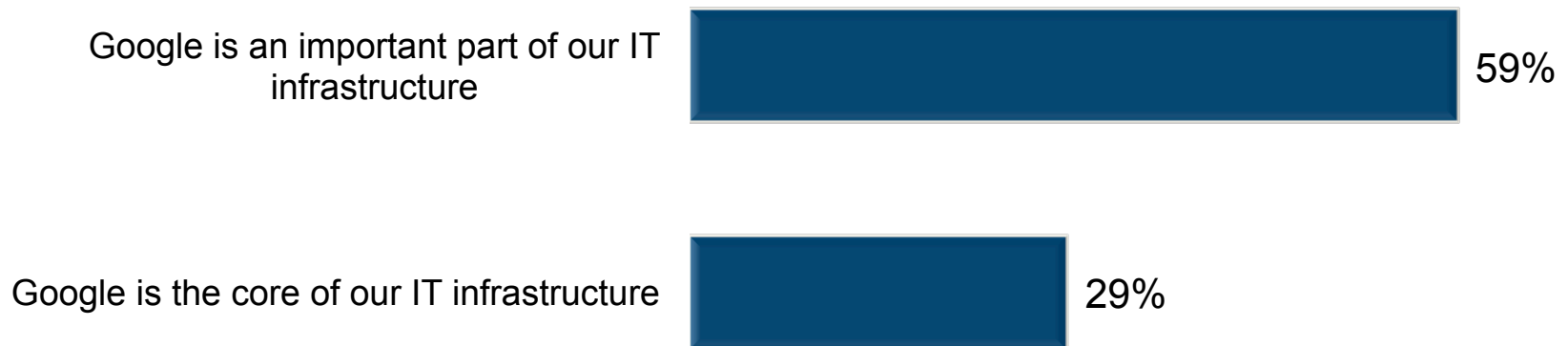
In fact, 33% of administrators overseeing corporate IT infrastructure cite third-party applications as playing an important or very important role in their organization's adoption of Google Apps and in their move to the cloud.



Source: Frost & Sullivan

Over half of administrators say that Google plays a key role within their corporate IT infrastructure.

59% of admins say that Google plays a key role in their organizational IT infrastructure—with another 29% saying that it is the core.



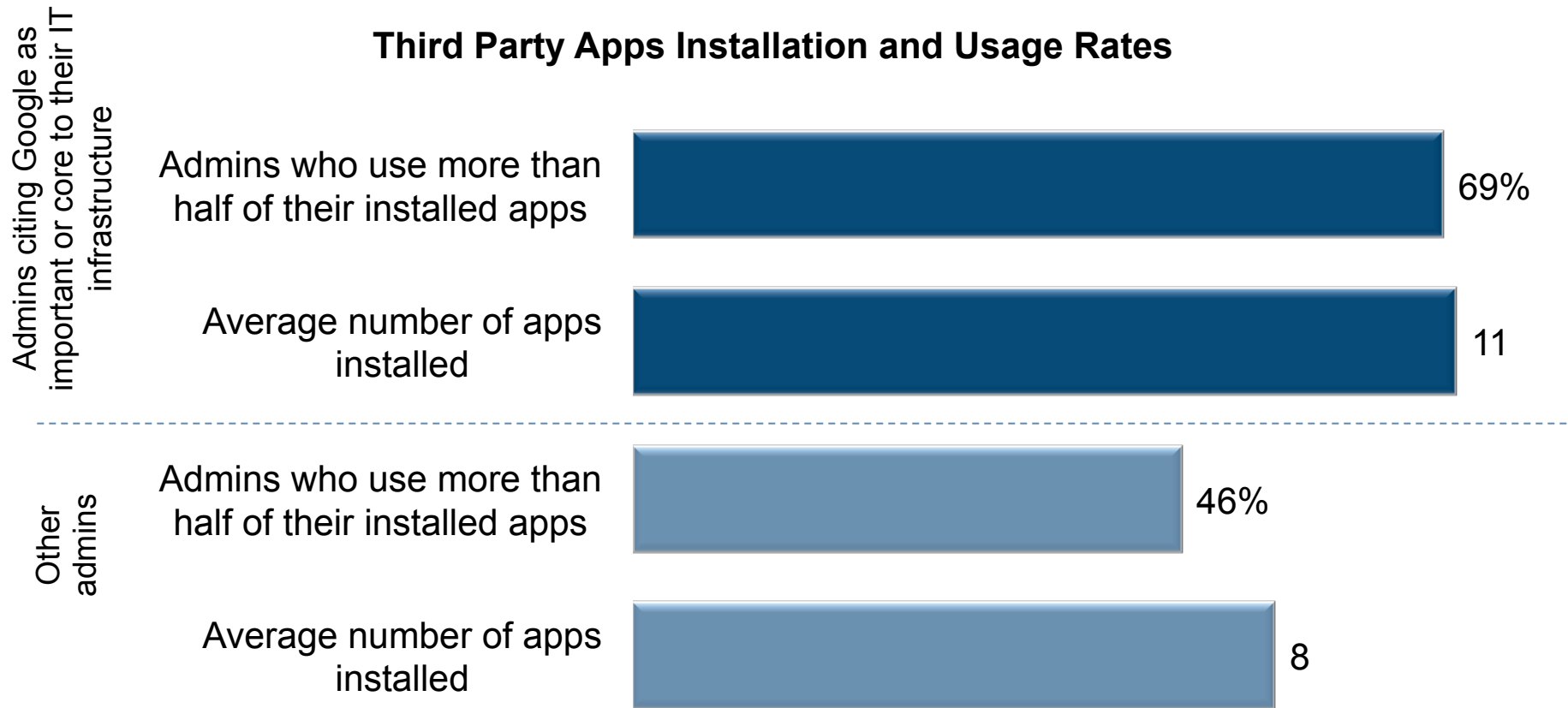
Evidence suggests that these third-party apps are making a big impact on migration, use, and overall satisfaction with Google Apps.

Source: Frost & Sullivan

Admins who adopt Google into their IT infrastructure install and use more apps overall

Admins who cite Google as the core or an important part of their IT infrastructure typically install more third-party applications, and continue to use them for a longer period of time.

Third Party Apps Installation and Usage Rates



Source: Frost & Sullivan

60% of Google Apps users are willing to spend their own money to purchase applications that optimize their workplace experiences.

For these users, enhanced productivity is worth personal financial investment.

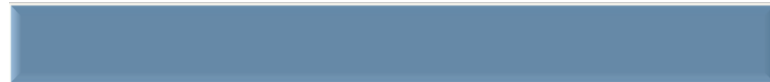
Willing to spend personal funds on ideal work apps



60%

65% of admins citing the Google Apps Marketplace as their most used marketplace for finding new applications, 5% above the next leading marketplace, the Google Apps ecosystem is well positioned for future growth.

Use the Google Apps Marketplace



65%

Use the next leading marketplace



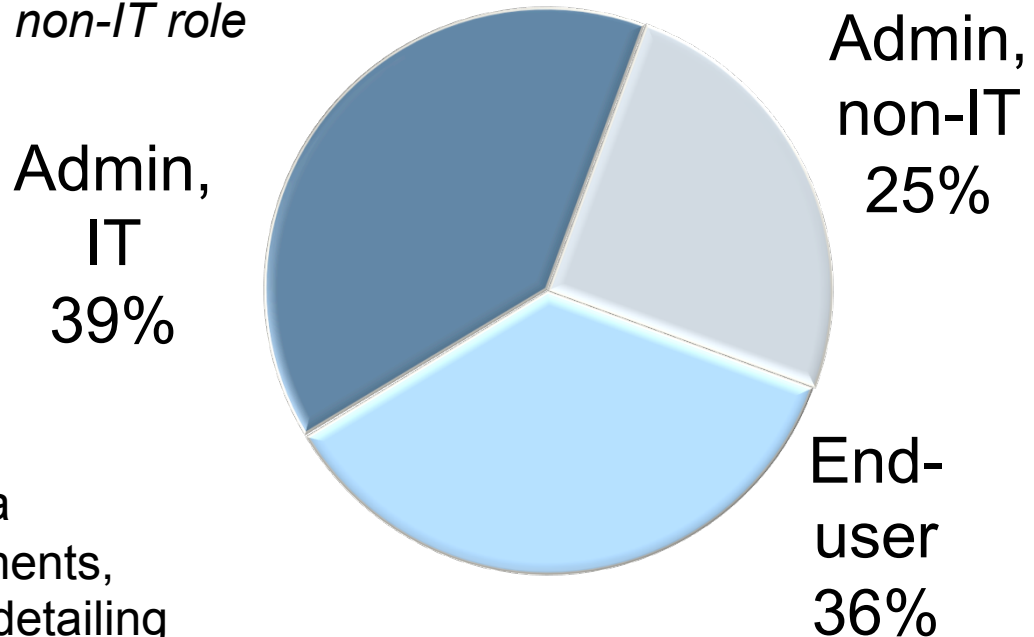
60%

Source: Frost & Sullivan

Survey Respondent Role Breakdown

Analysis focuses on three segments of users, who are classified according to their role in their organization:

- Admin, IT: *IT professional in an IT administrator role*
- Admin, non-IT: *Non-IT professional working as an IT administrator*
- End-user: *end user in a non-IT role*



Each section begins with a summary of the user segments, and a hypothetical profile detailing what a typical user in that segment would be like.

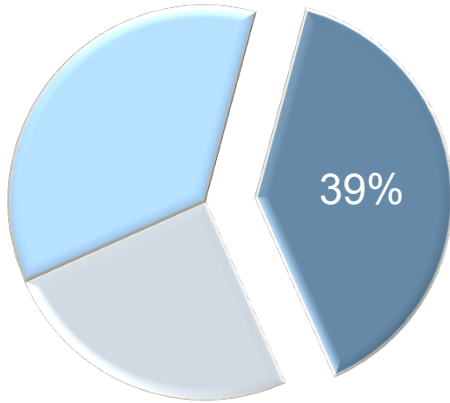
Source: Frost & Sullivan

Summary of Administrators

- Most admins work in small companies focused in industries that deal directly with clients, particularly technology and consulting.
- Most are owners or managers, with relatively more non-IT admins being owners of small companies who manage many aspects of their business.
- Nearly all have been on Google Apps for over one year, and most consider Google to play at least an important role in their organization.
- In the process of adopting Google Apps, approximately one third of admins find third-party applications to be important or very important, with another third finding them to still be helpful in the transition.
- Since migrating to Google Apps, nearly half of admins in IT positions, and over half of those in non-IT positions cite third-party applications as helping their organization to move or to have moved to cloud-based infrastructure.
- Admins typically use Google Apps both at home and at work, and are a developed customer base that appear keen to further adopt cloud computing solutions that can provide efficiency gains in supporting a mobile workforce and that integrate easily with their current infrastructure.

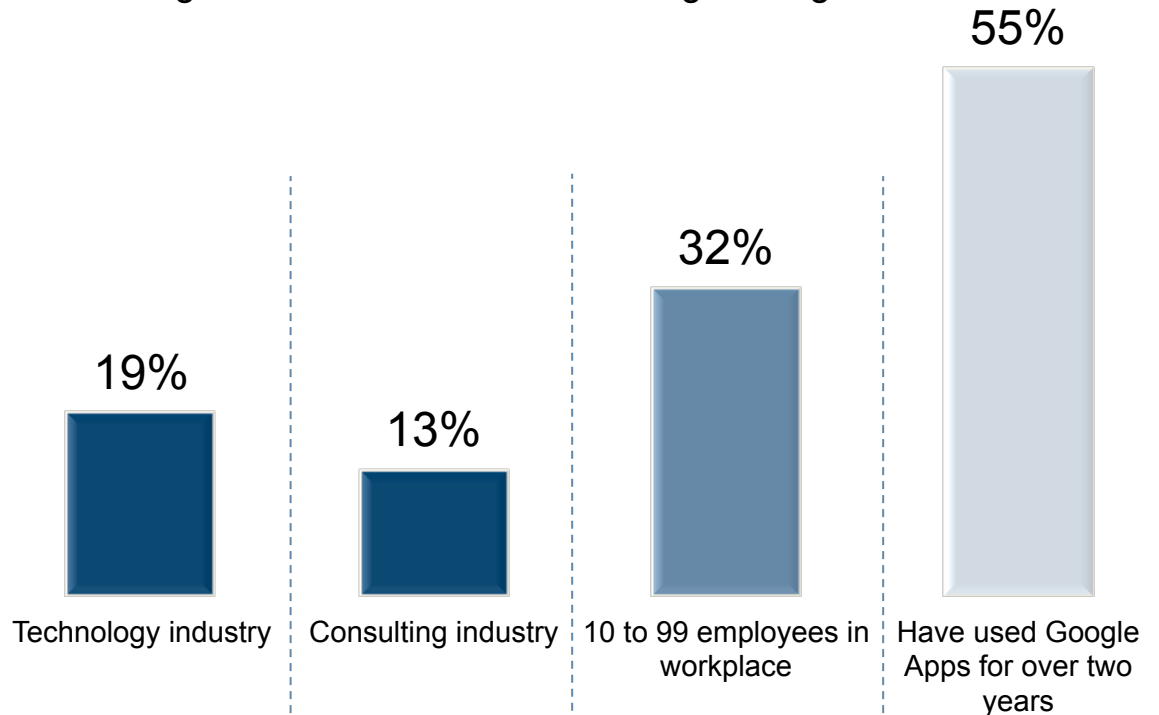
Source: Frost & Sullivan

Profile of Administrators (IT)



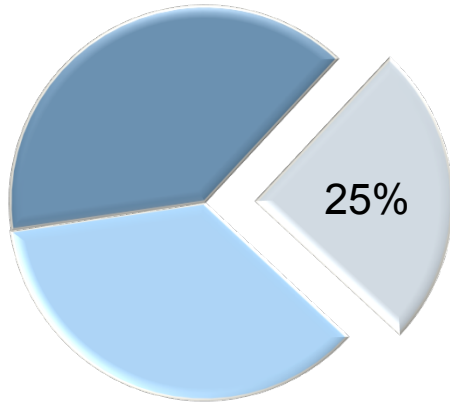
I am an IT professional working as an administrator. I am quick to adopt new apps into my own lifestyle, and keen to migrate my user base. I typically work for a small or mid-sized company in a tech-savvy industry. I have used the Google Apps suite for a while, and am looking to migrate my user base to the cloud. I am particularly satisfied with communication and networking solutions like Gmail and Google Hangouts.

I rely on third-party applications that surround the Google Apps suite, and take the advice of Google Enterprise professionals. I also have a strong relationship with vendors and resellers, and will take their advice. After so many good experiences, I trust Google Apps.



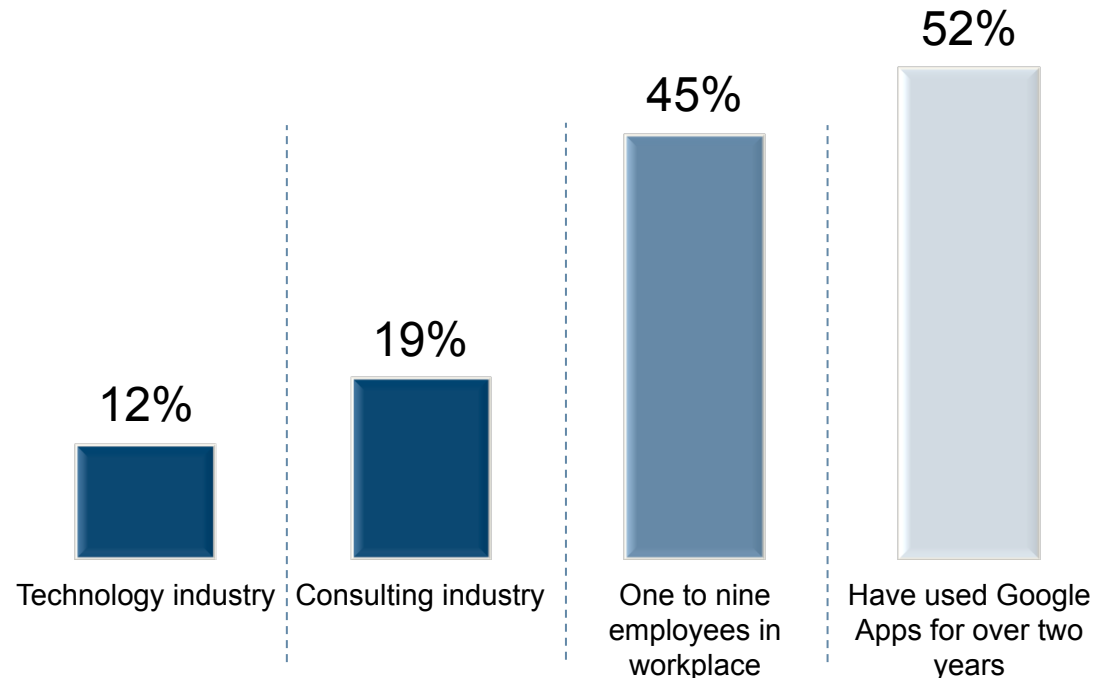
Source: Frost & Sullivan

Profile of Administrators (non-IT)



I am a small business owner who is forced to wear many different hats, including managing the IT infrastructure of my company. My time is very valuable, so I appreciate any apps that provide multiple, streamlined communications options like Google Hangouts and Google+. It is important that my apps are reliable and easy to use; and I would be willing to spend my own money on them if they are good enough.

When looking for new Marketplace apps, I typically trust the recommendations of colleagues who have had positive experiences with Google and third-party applications.



Source: Frost & Sullivan

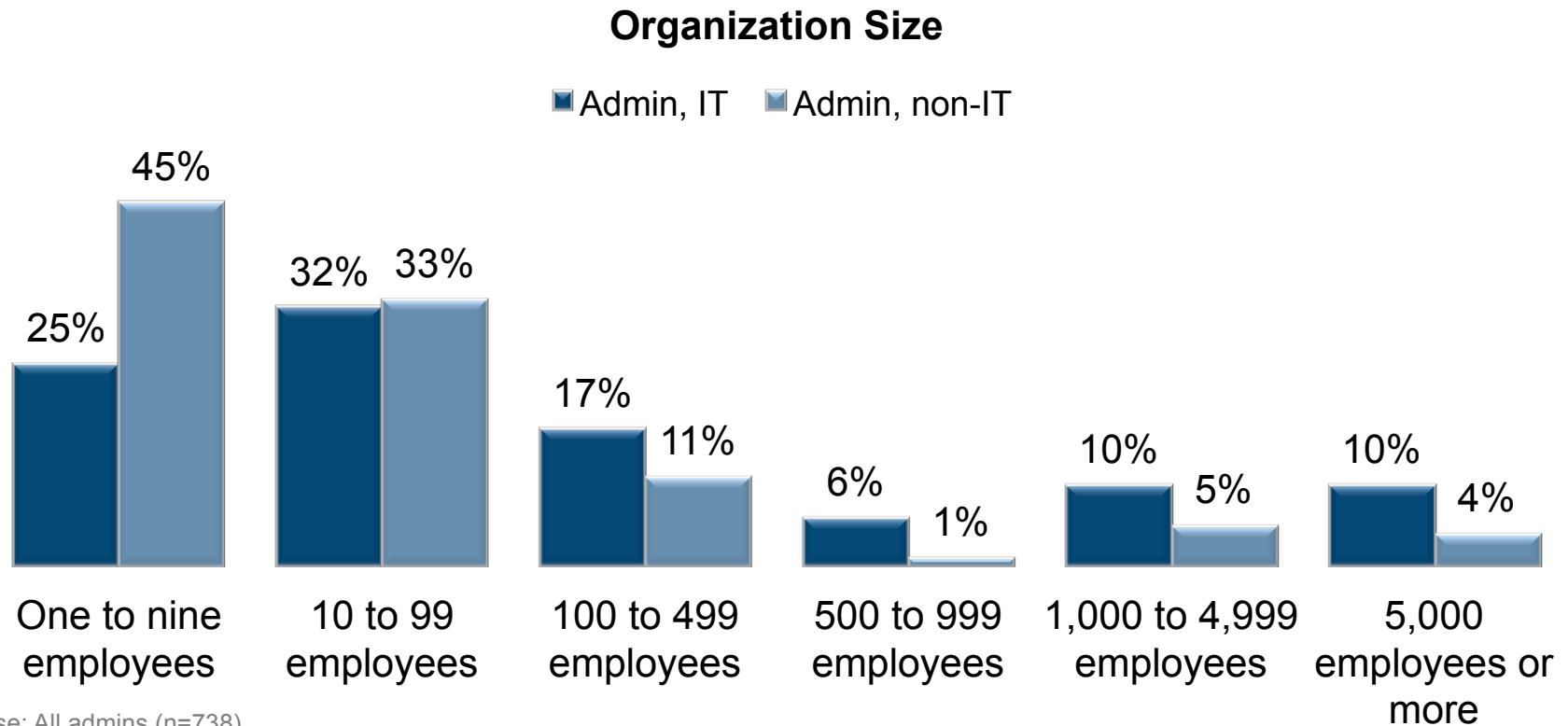
Demographic Profile

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Organization Size

They also typically work in companies that are larger than the national average, with a median of 60 employees compared to the national average of 21.



Base: All admins (n=738).

Q30. What is the number of employees across your entire organization worldwide, including all of its branches, divisions, and subsidiaries?

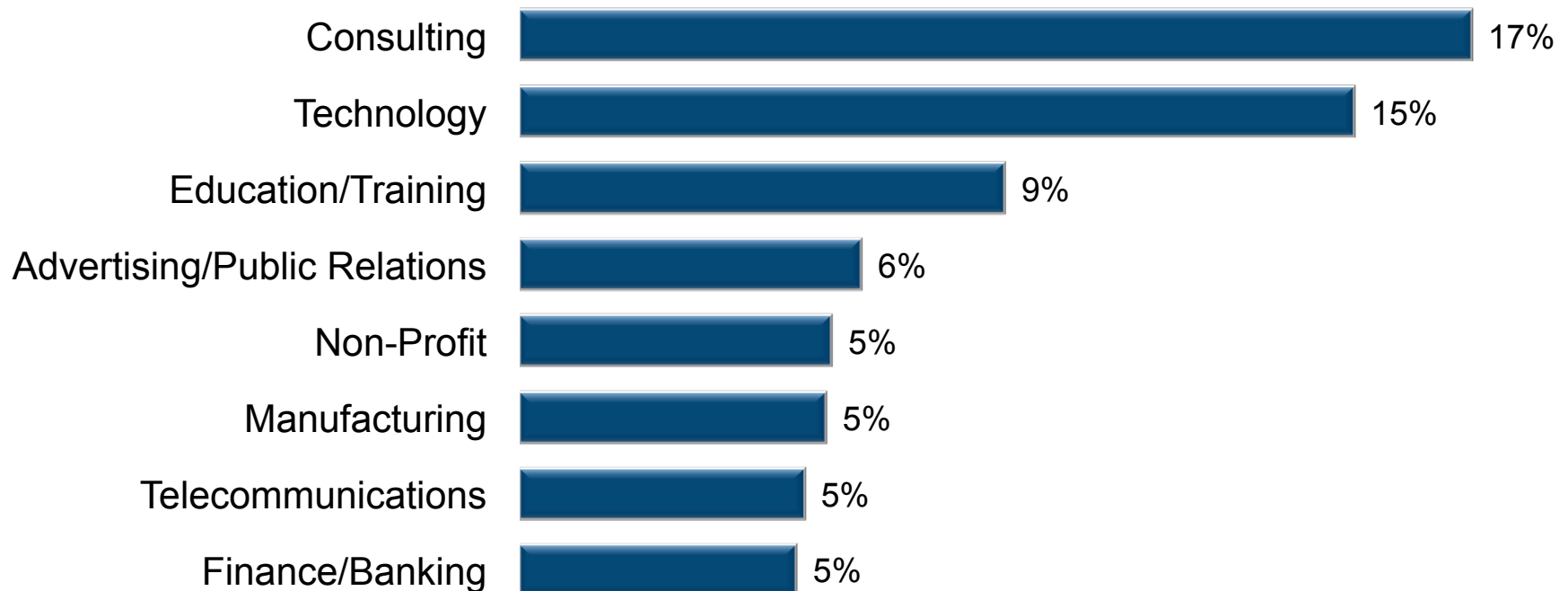
The national average is calculated using data from the Statistics of U.S. Business for 2008, according to the United States Census Bureau.

Source: Frost & Sullivan

Industry Sector

These companies typically focus on technology or consulting business practices, and more generally are in industries that regularly communicate with clients. This, in turn, underscores the importance that these organizations place on having a mobile workforce.

Top Industry Sectors



Base: All admins (n=738).

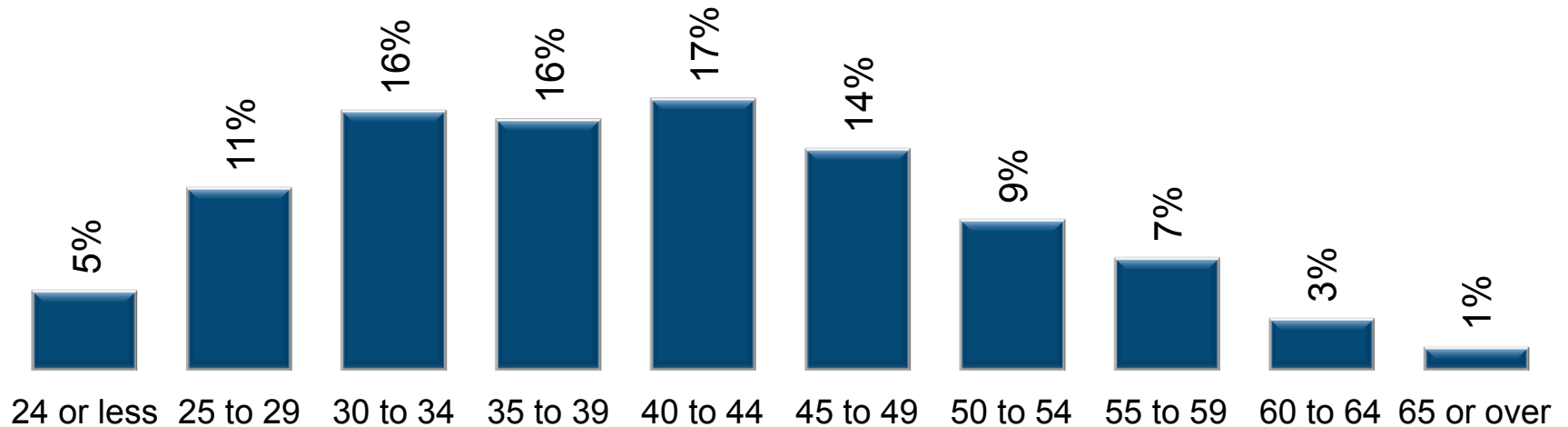
Q31. Which of the following industry sectors best describes your company?

Source: Frost & Sullivan

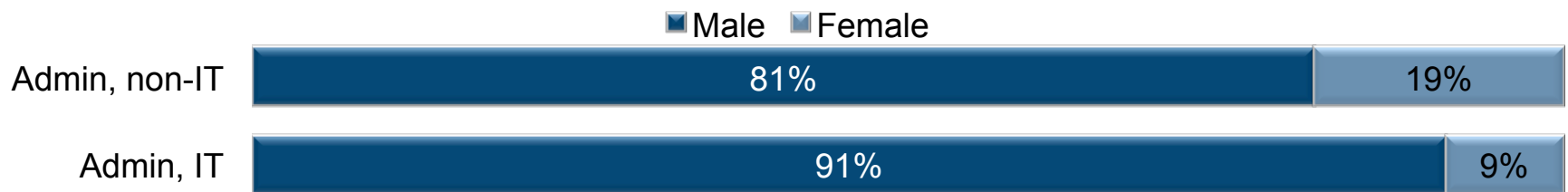
Respondent Age and Gender

Most respondents are in the age range of 30 to 44, with more females being non-IT administrators and more men being in an IT role.

Respondent Age



Respondent Gender



Base: All admins (n=738).

Q33. Which of the following categories contains your age?

Source: Frost & Sullivan

Application Usage and Satisfaction

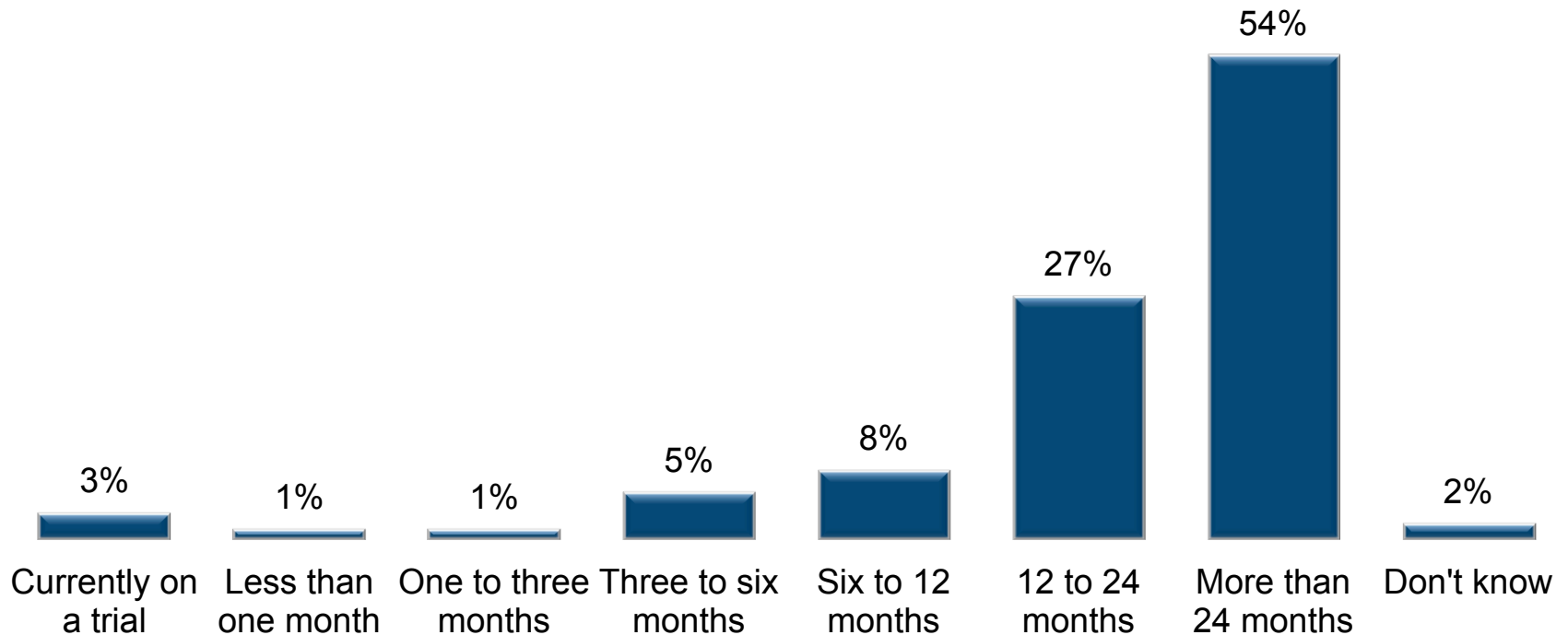
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Time Spent on Google Apps

Nearly all respondents have been using Google Apps for at least one year, with over 50% having passed the two-year usage mark.

Time Spent on Google Apps



Base: All admins (n=738).

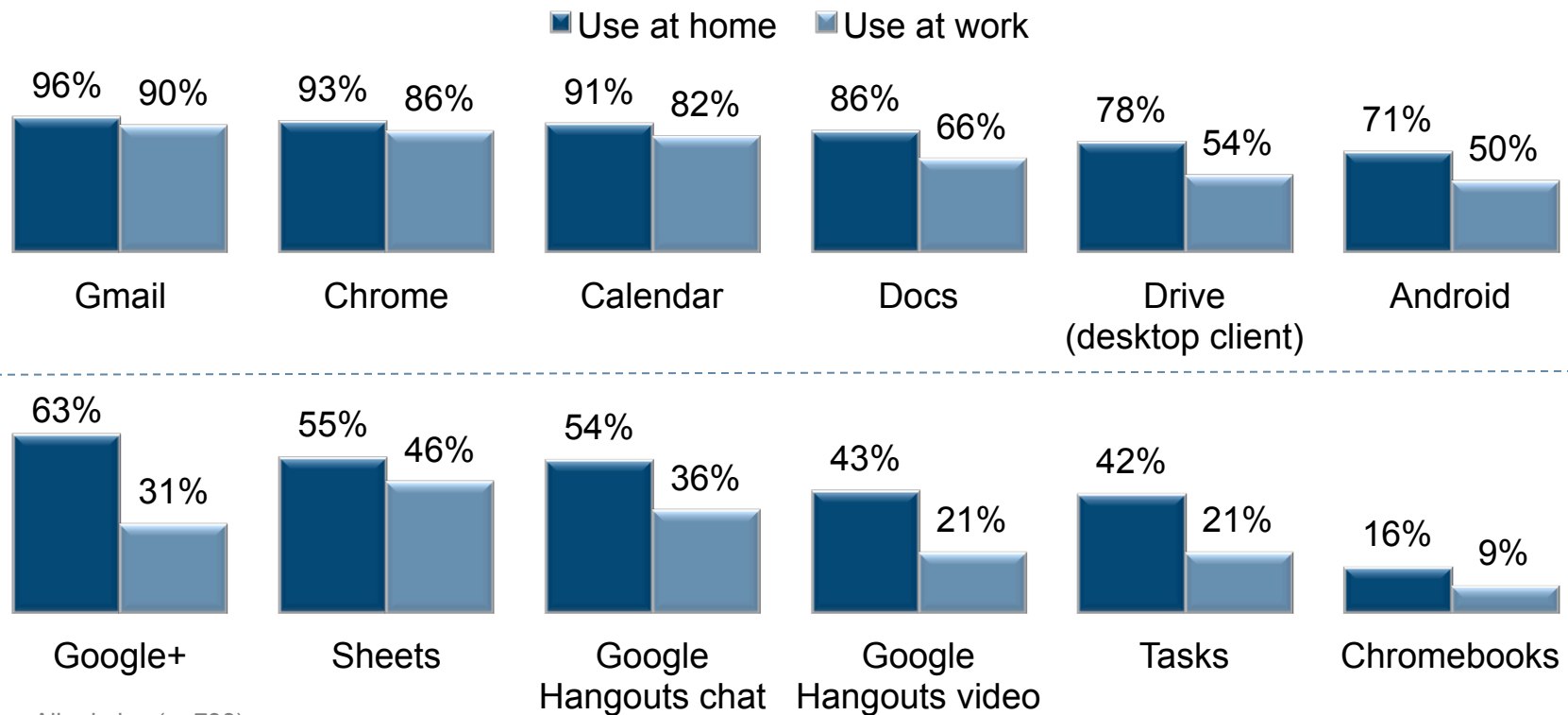
Q3. How long has your organization been using Google Apps?

Source: Frost & Sullivan

Google Applications Used at Home and in the Workplace

Over half of admins have adopted cloud-based office suite apps like Google Docs and Drive into their workplace. Notably, 16% of admins have already begun using very new technology like Chromebooks at home.

Google Applications Used at Home and in the Workplace



Base: All admins (n=738).

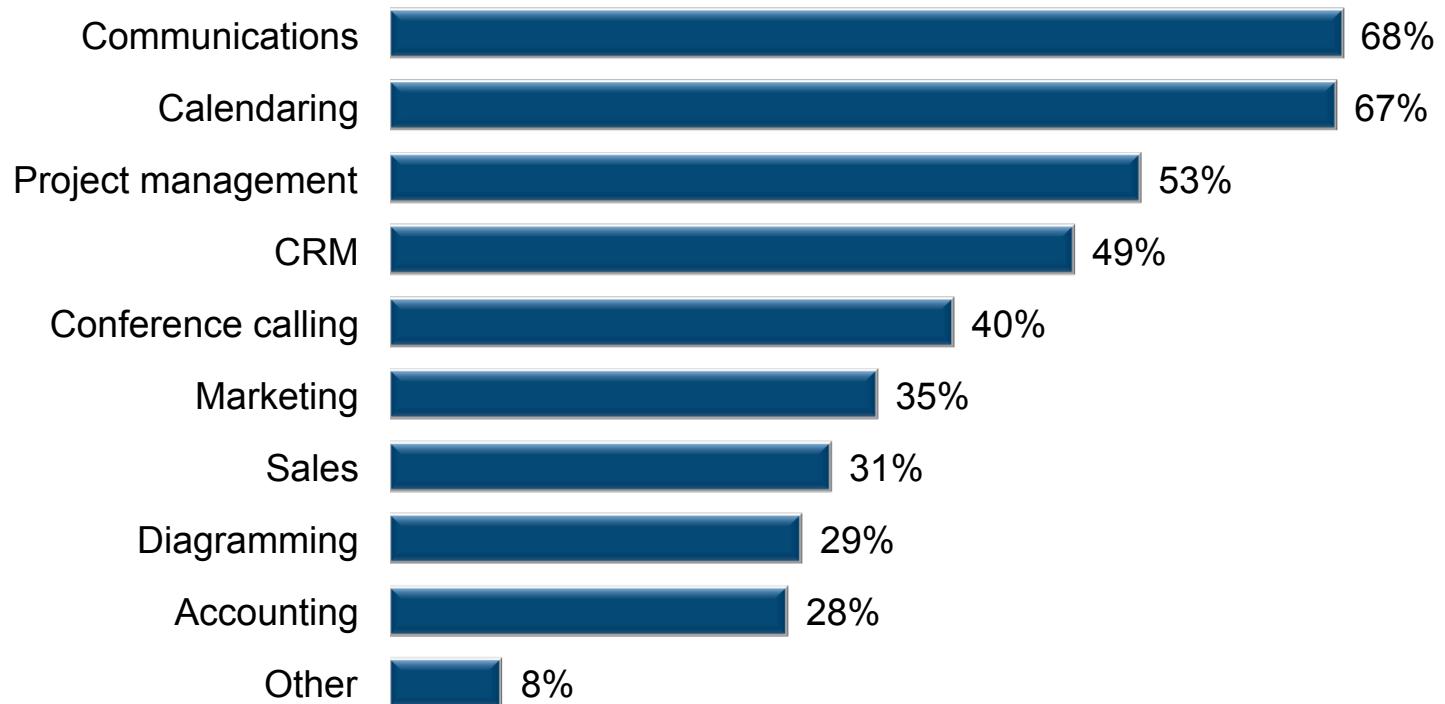
Q4. Which of the following Google Apps or products do you use for either business or personal use?

Source: Frost & Sullivan

Web Applications in the Workplace

Most admins use calendar, communication, and project management apps—likely to support their mobile, remote workplace.

Types of Web Applications Used



Base: All admins (n=738).

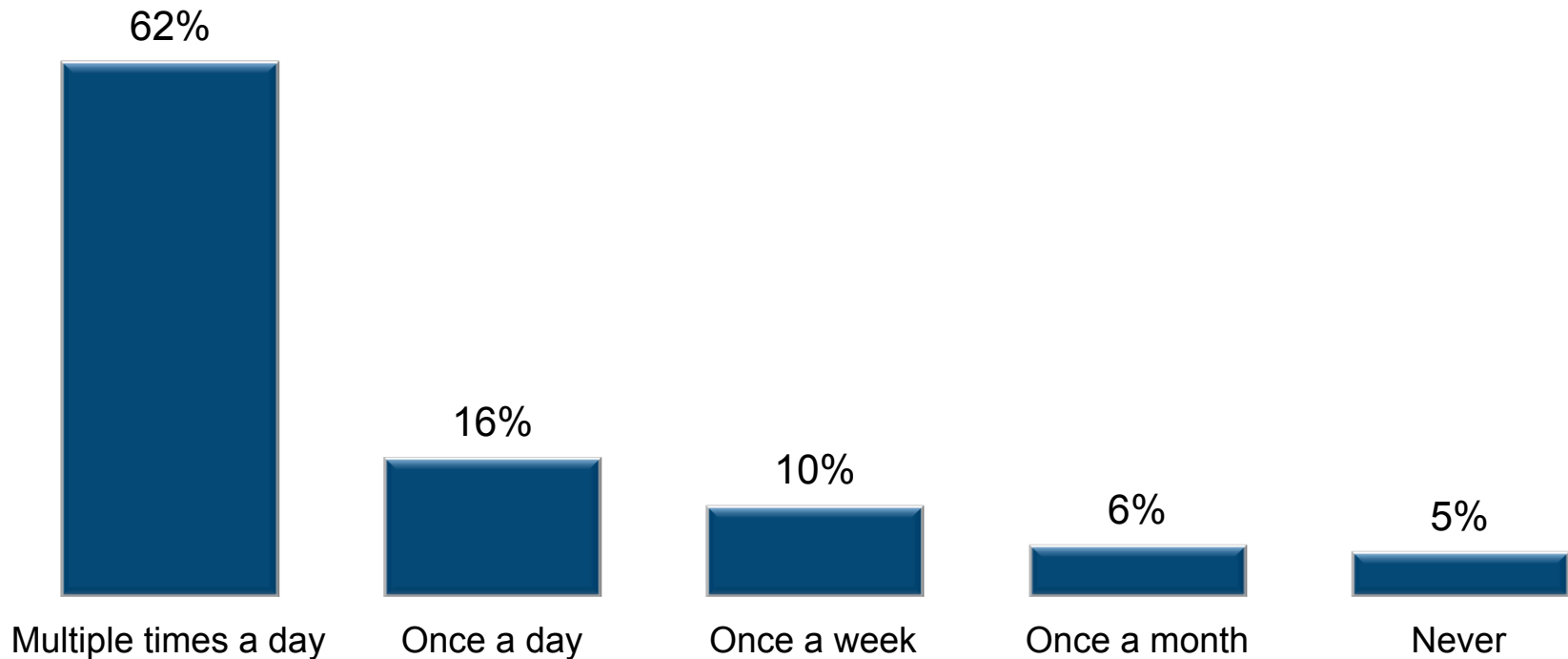
Q21c. What type of web applications do you use?

Source: Frost & Sullivan

Frequency of App Usage

Over three quarters of administrators use their applications on at least a daily basis, with nearly two thirds using them multiple times per day.

Frequency of Apps Usage



Base: All admins (n=738).

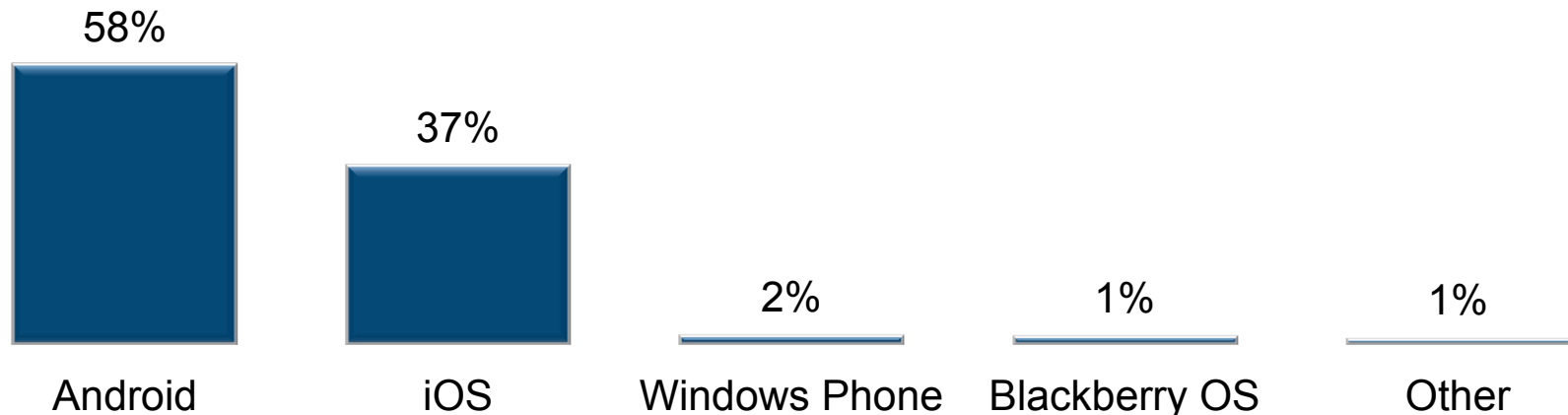
Q23. How often do you use the applications that you have installed?

Source: Frost & Sullivan

Mobile Operating System Used Most Often

With over three quarters of admins being free to choose their own workplace mobile operating system, 58% opt for devices running Google's Android operating system.

Mobile Operating System Used Most Often



Organizational Policy Towards Mobile Operating Systems



Base: All admins (n=738).

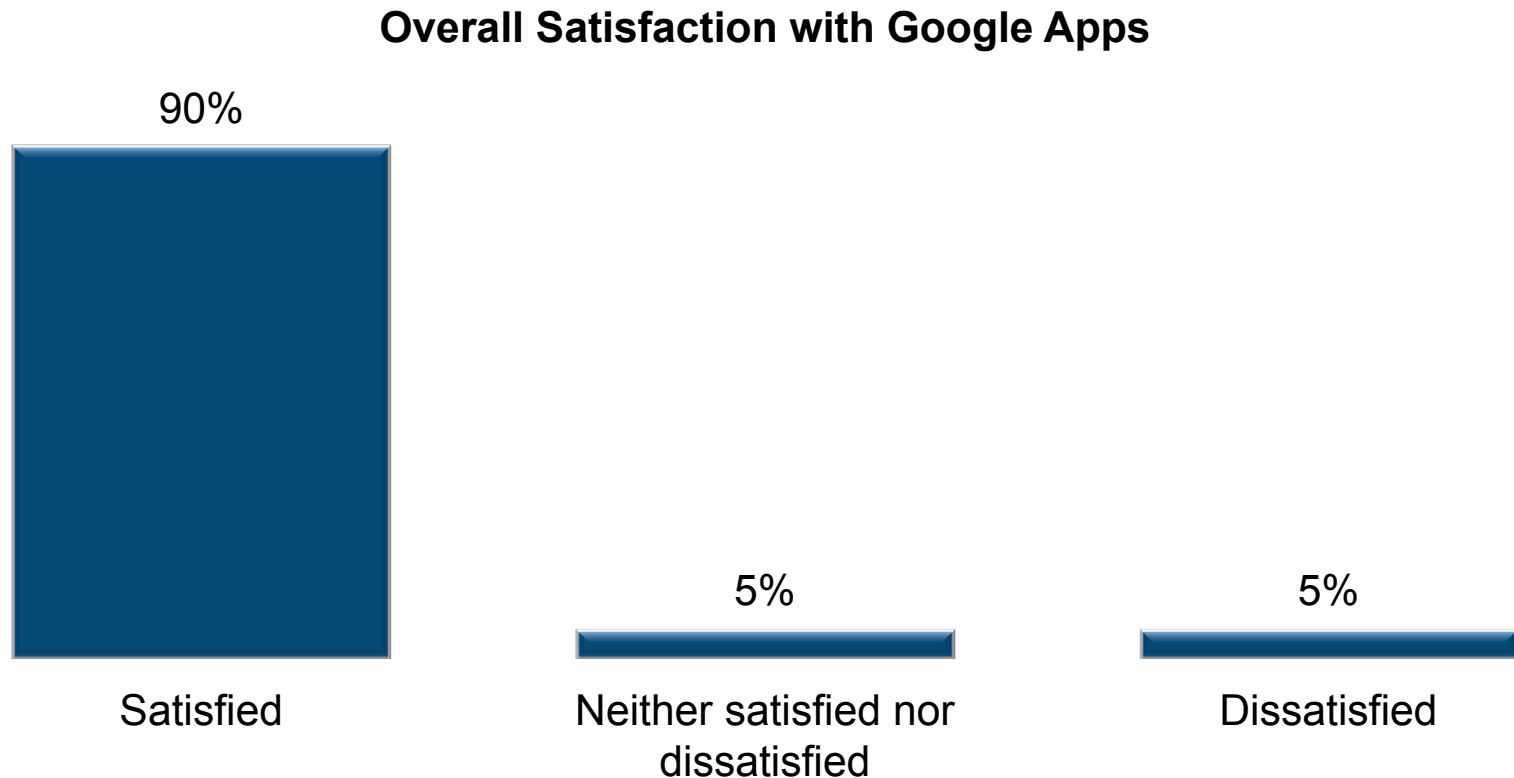
Q17. Which one of the following mobile operating systems do you use most often? Select one answer only.

Q18. Is the mobile operating system you use most often mandated by your company?

Source: Frost & Sullivan

Overall Satisfaction with Google Apps

Nearly all administrators (90%) are satisfied with Google Apps—with over half of those rating their experience as very satisfying.



Base: All admins (n=738).

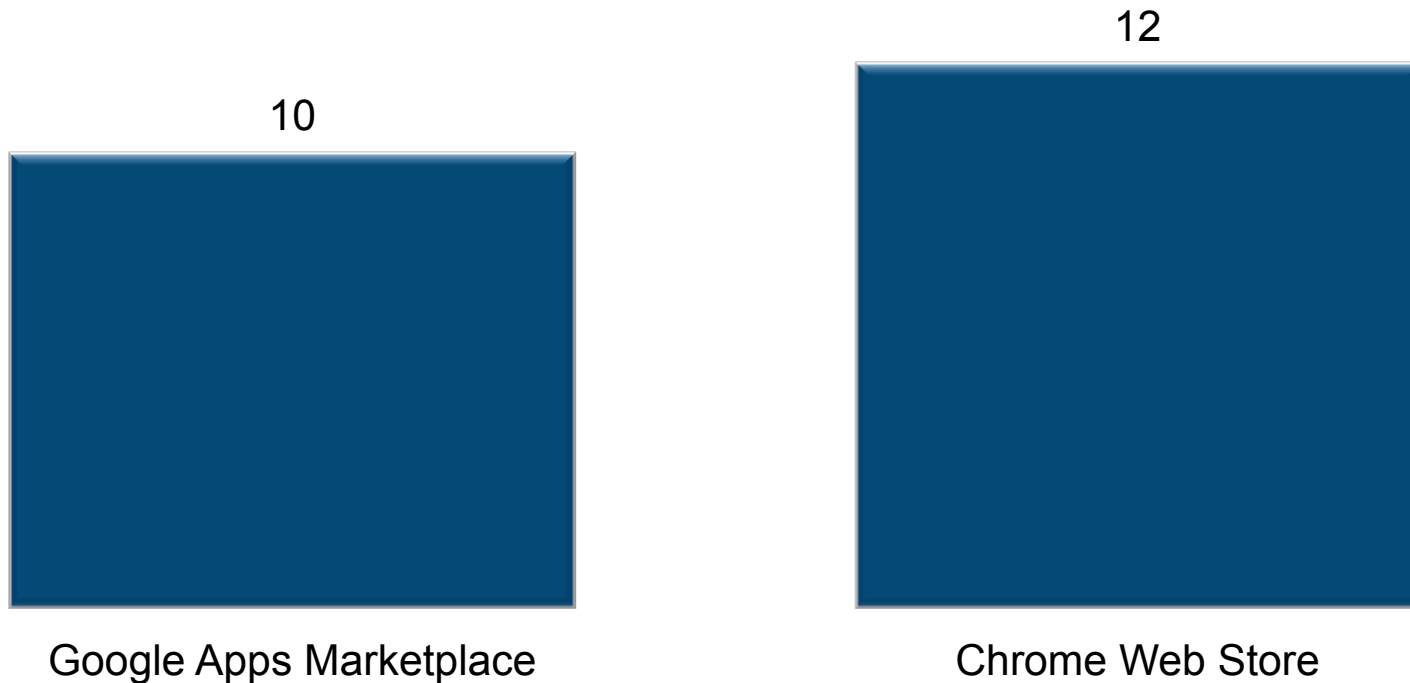
Q5. Which of the following best describes your overall satisfaction with Google Apps?

Source: Frost & Sullivan

Average Number of Installed Apps

On average, admins install almost as many applications from the Google Apps Marketplace compared to the Chrome Web Store, which is more easily accessible directly through the Chrome browser.

Average Number of Apps Installed



Base: Filtered respondents, admins who have used the Google Apps Marketplace (n=562) and Chrome Web Store (n=478)

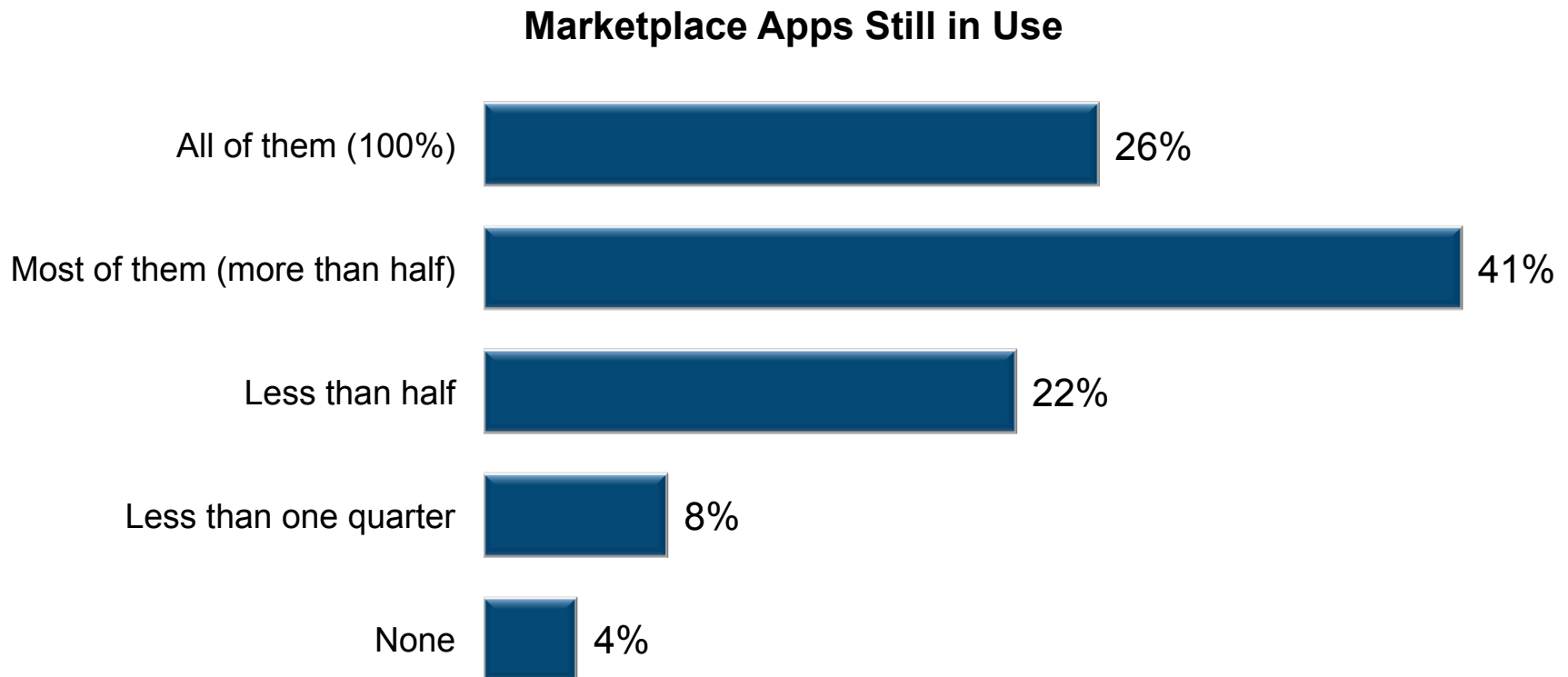
Q20a. How many apps have you installed from Google Apps Marketplace?

Q21a. How many apps have you installed from Chrome Web Store?

Source: Frost & Sullivan

Marketplace Apps Still in Use

They typically use at least half of installed Marketplace apps, with one quarter of admins continuing to use all installed apps.



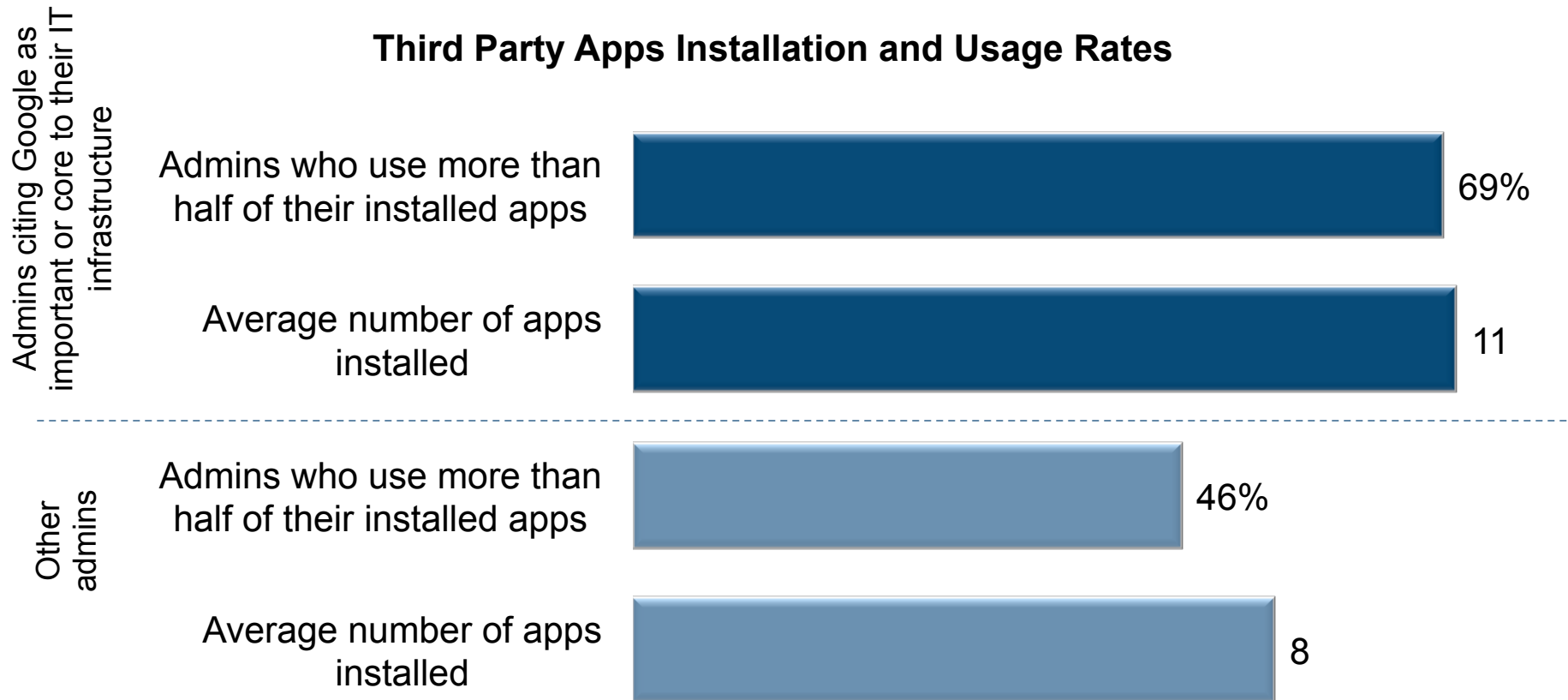
Base: Filtered respondents, admins who have used the Google Apps Marketplace (n=562).
Q20b. How many of the apps that you installed from Google Apps Marketplace do you still use?

Source: Frost & Sullivan

Third Party Apps Installation and Usage Rates by Organizations Embracing Google

Admins who cite Google as the core or an important part of their IT infrastructure typically install more third-party applications, and continue to use them for a longer period of time.

Third Party Apps Installation and Usage Rates



Base: All admins who have downloaded apps from the Google Apps Marketplace (n=562).

Q20a. How many apps have you installed from Google Apps Marketplace?

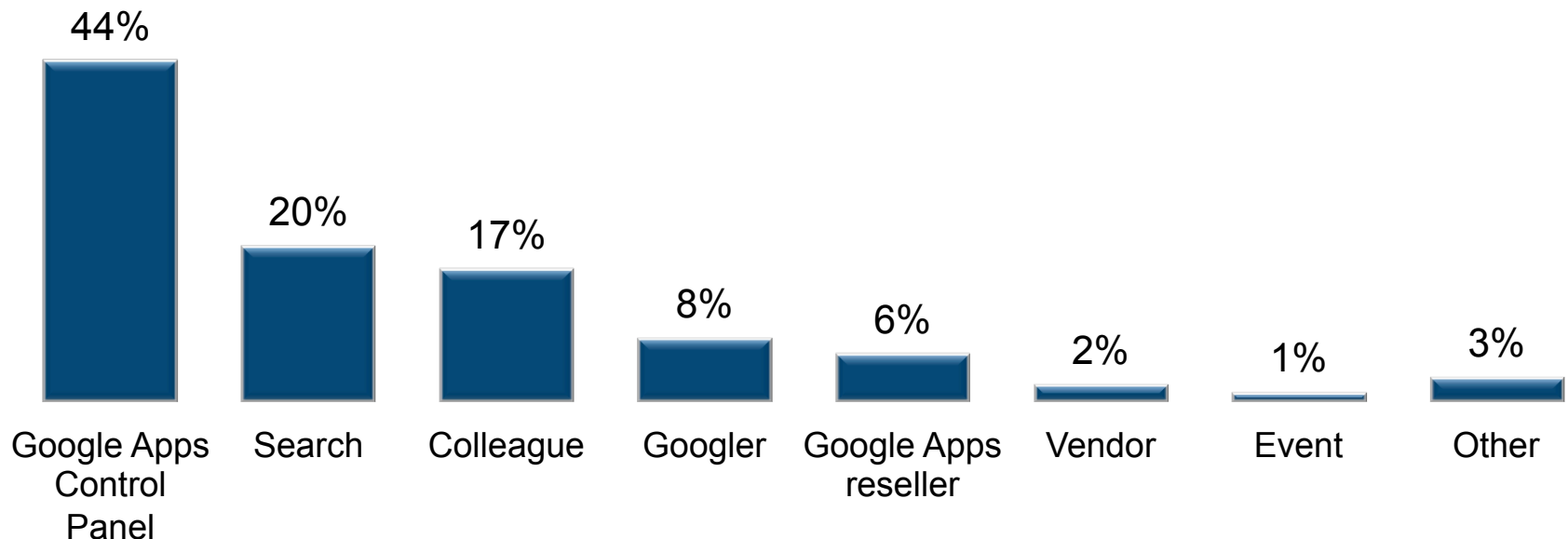
Q20b. How many of the apps that you installed from Google Apps Marketplace do you still use?

Source: Frost & Sullivan

Factors Prompting Awareness of the Google Apps Marketplace

The most prominent source for prompting awareness of the Google Apps Marketplace is the Google Apps Control Panel, which accounts for the primary source of awareness for 44% of administrators.

Factors Prompting Awareness of the Google Apps Marketplace



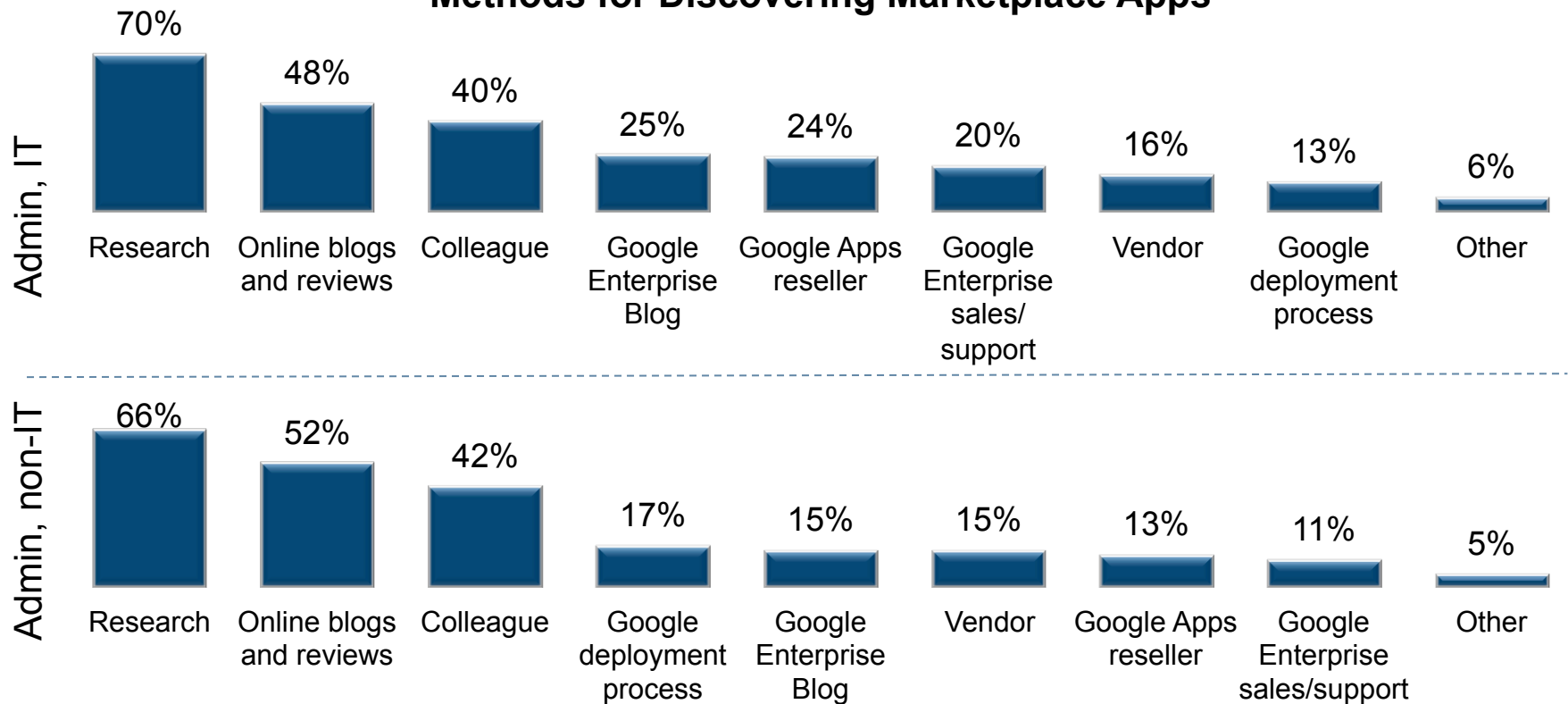
Base: Filtered respondents, admins who have used the Google Apps Marketplace (n=562).
Q20c. How did you first become aware of the Google Apps Marketplace?

Source: Frost & Sullivan

Methods for Discovering Marketplace Apps

Independent research, online reviews, and colleague recommendations are the most popular methods among administrators for discovering new apps in the Google Apps Marketplace. Admins in a non-IT role, who typically work higher up in their organization, rely relatively more on positive experiences from other users to guide their choices.

Methods for Discovering Marketplace Apps



Base: All admins (n=738).

Q9a. What methods for discovering Google Apps Marketplace applications do you find valuable?

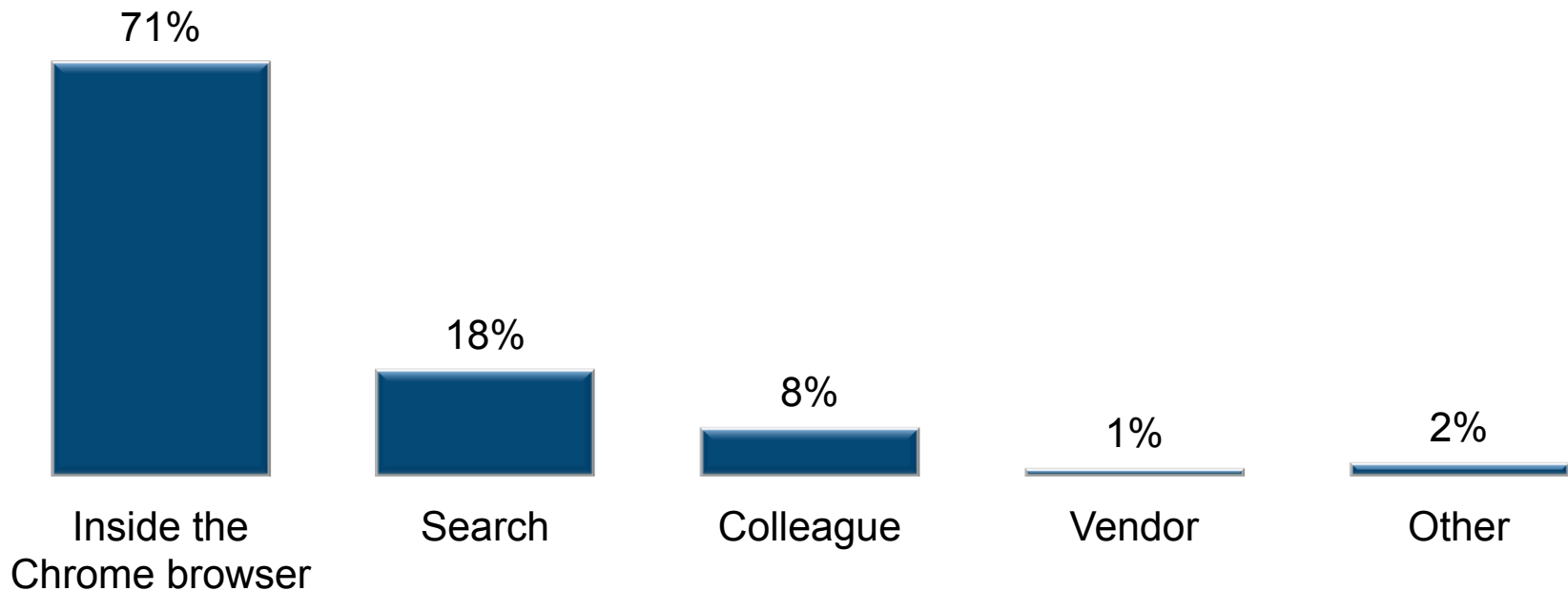
Q9b. What is the one method for discovering Google Apps Marketplace applications that you find most valuable?

Source: Frost & Sullivan

Factors Prompting Awareness of the Chrome Web Store

Nearly three quarters of administrators first discover the Chrome Web Store through the Chrome browser, which itself is used by over 90% of admins.

Factors Prompting Awareness of the Chrome Web Store



Base: Filtered respondents, admins who have used the Chrome Web Store (n=478).
Q21b. How did you first become aware of the Chrome Web Store?

Source: Frost & Sullivan

Cloud Adoption and Other Infrastructure Changes

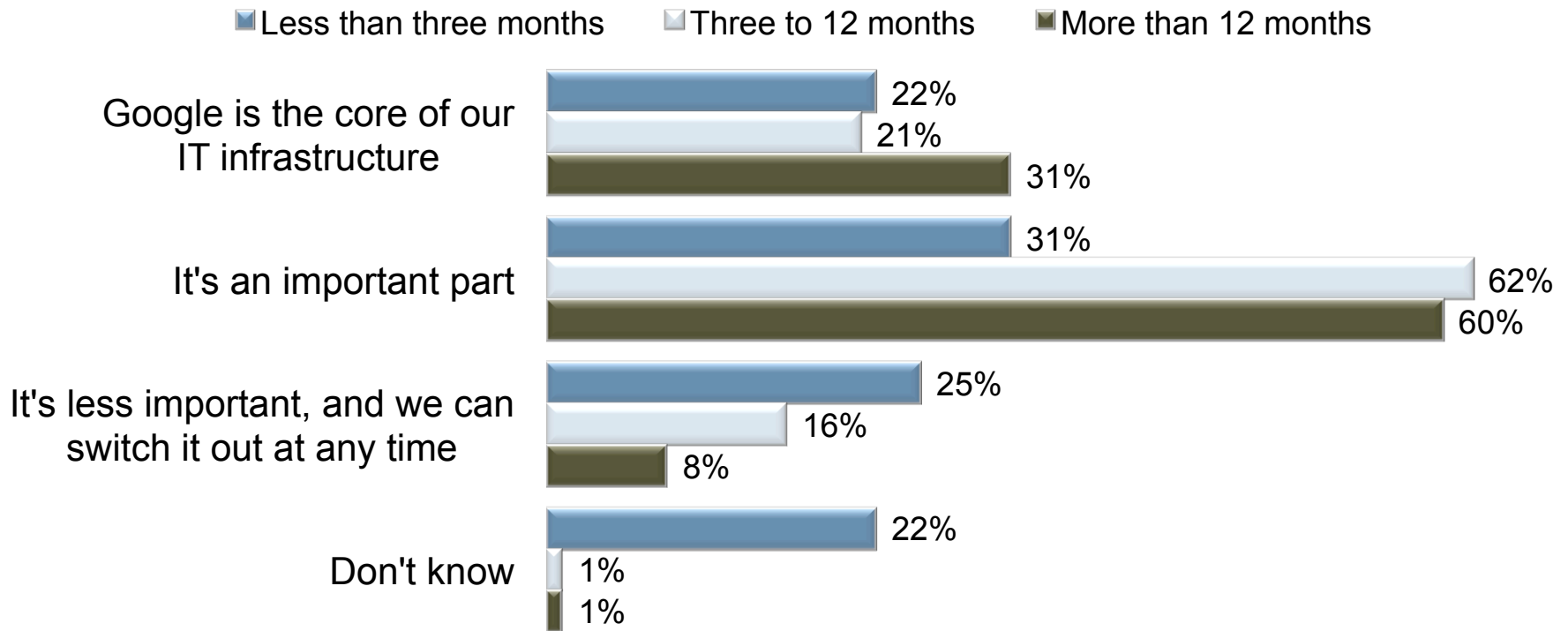
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Google's Impact on IT Infrastructure

Most administrators, especially those who have used Google Apps for at least a year, consider Google to be an important part of their IT Infrastructure. Nearly one third of these admins even cite Google as the core of their system.

Google's Impact on IT Infrastructure



Base: All admins (n=738).

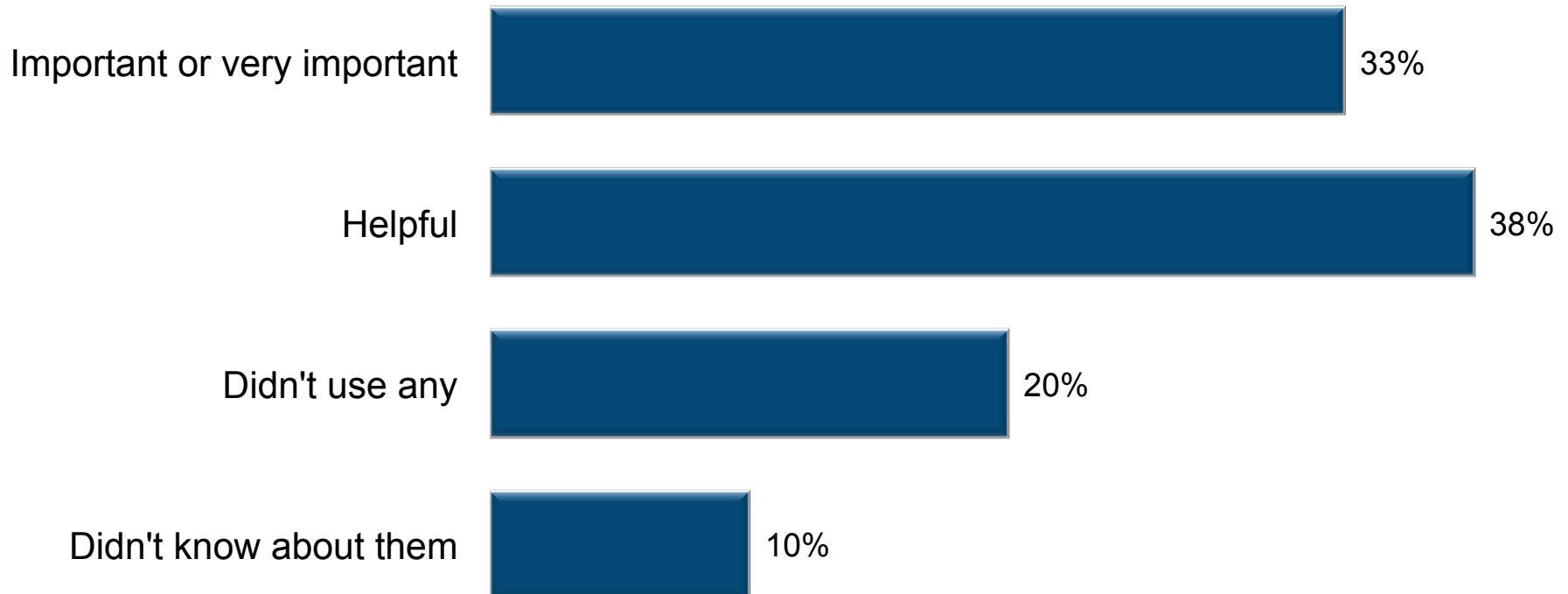
Q7. Which of the following best describes the impact of Google on your IT infrastructure?

Source: Frost & Sullivan

Importance of Third-Party Apps in Transition to Google Apps

In their transition to Google Apps, over one third of admins found third-party applications to be important or very important in facilitating their migration. A further third consider third-party applications to be helpful, although not integral to their successful move.

Importance of Third-Party Apps in Transition to Google Apps



Base: All admins (n=738).

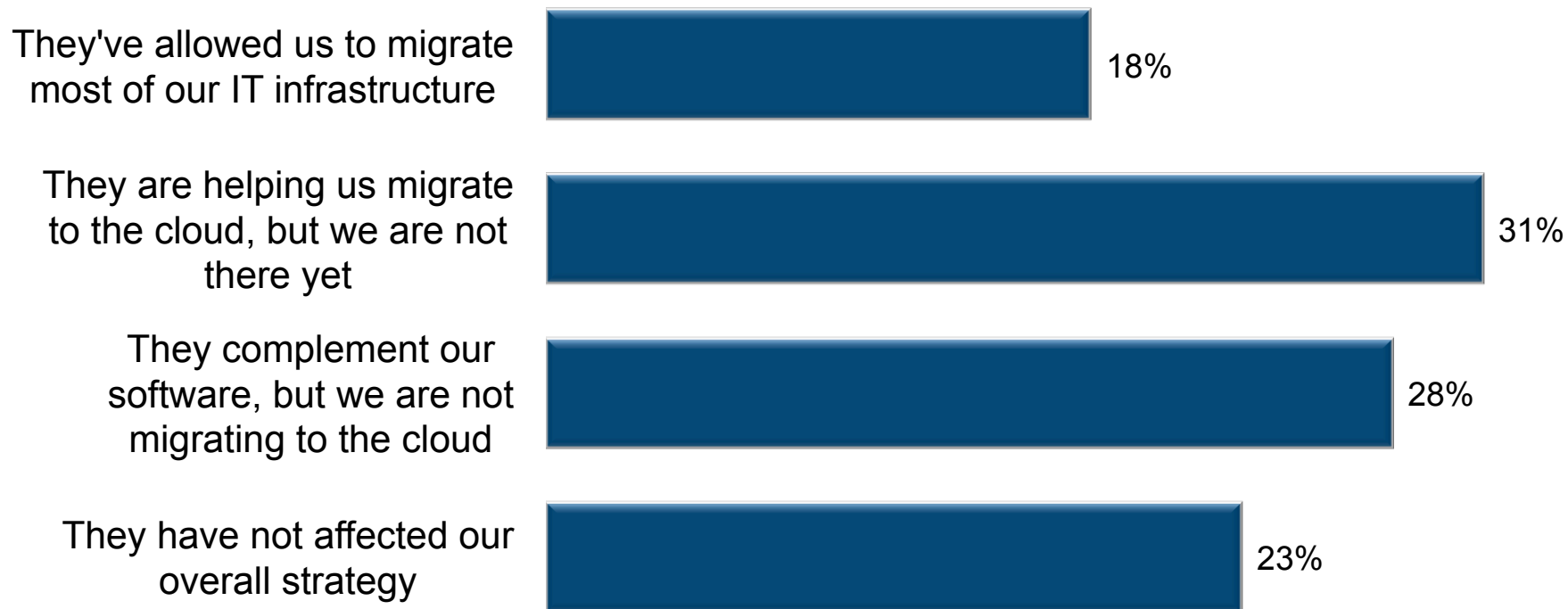
Q10. How important were third-party applications in your decision to move to Google Apps?

Source: Frost & Sullivan

Role of Third-Party Apps in Complete Adoption of the Cloud

After moving to Google Apps, nearly half of admins continue to use third-party apps to assist in the implementation and adoption of the cloud.

Role of Third Party Apps in Complete Adoption of the Cloud



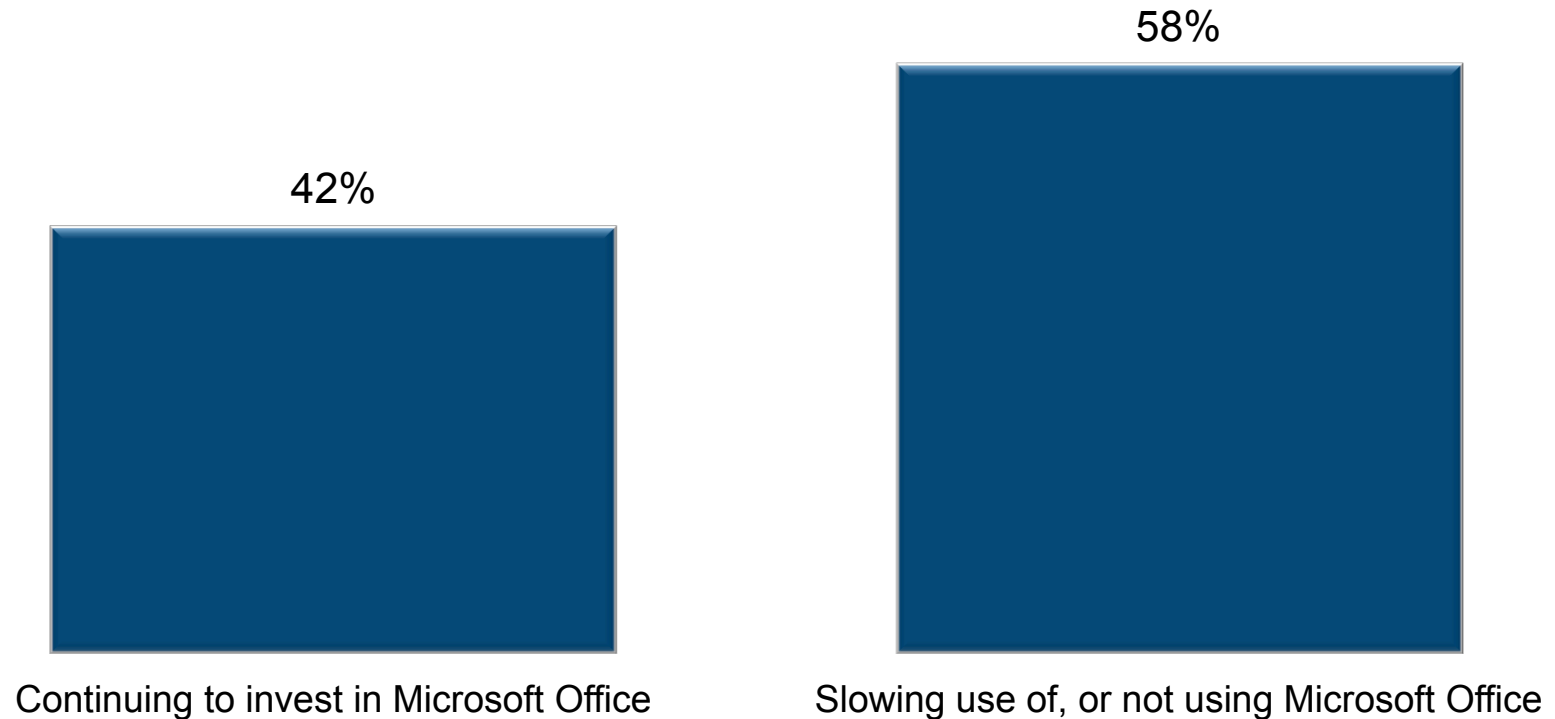
Base: All admins (n=738).

Q11. Now that you've migrated to Google Apps, how do third-party applications play into your overall IT strategy?

Source: Frost & Sullivan

Future Investment Plans for Microsoft Office

In continuing their move to cloud-based infrastructure, only 42% of administrators plan to continue investing in Microsoft Office products for the majority of their workforce.



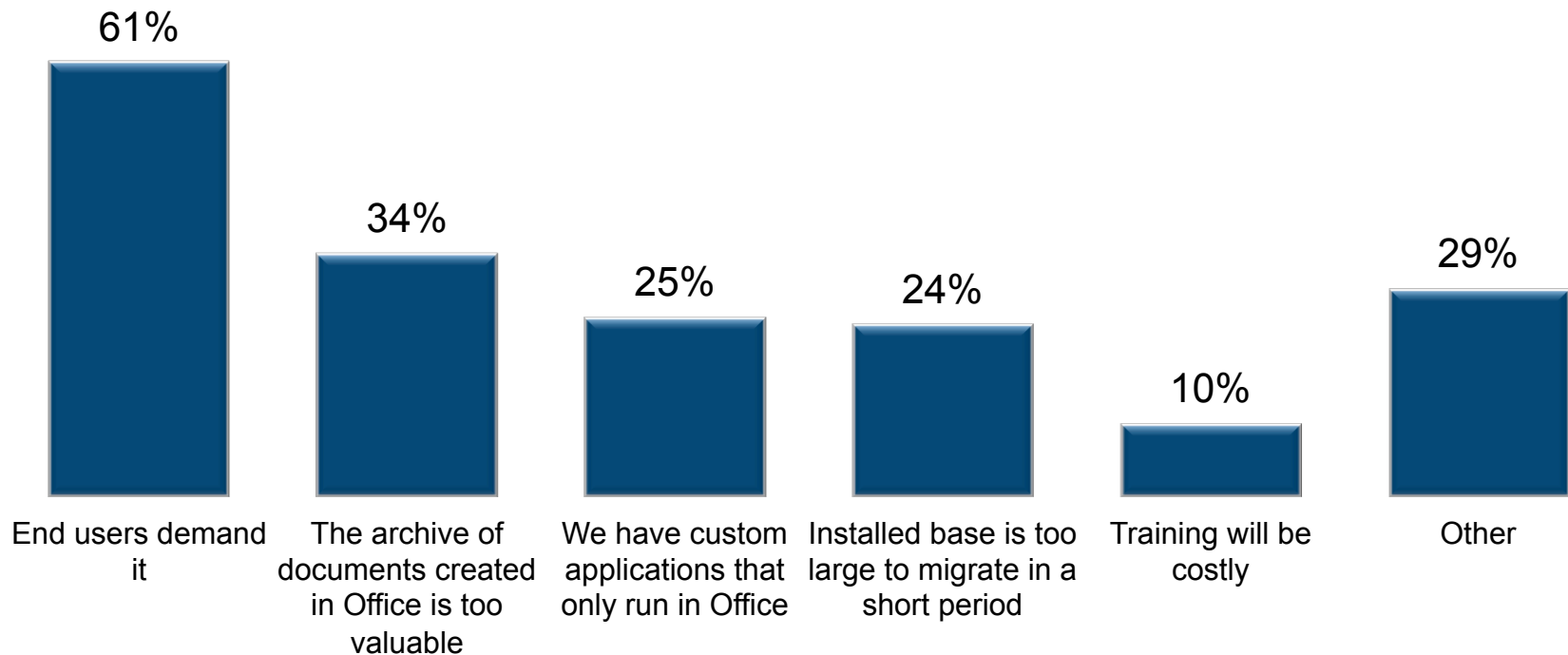
Base: All admins (n=738).

Q8a. How would you characterize your organization's strategy towards using and supporting Microsoft Office products? Source: Frost & Sullivan

Reasons for Continued Investment in Microsoft Office

Of those organizations that do continue to support the Microsoft suite, 61% cite demand from end users as their primary motivation, with another 34% needing to maintain access to their archive of Office documents.

Reasons for Continued Investment in Microsoft Office



Base: Filtered respondents, admins using Microsoft Office (n=667).

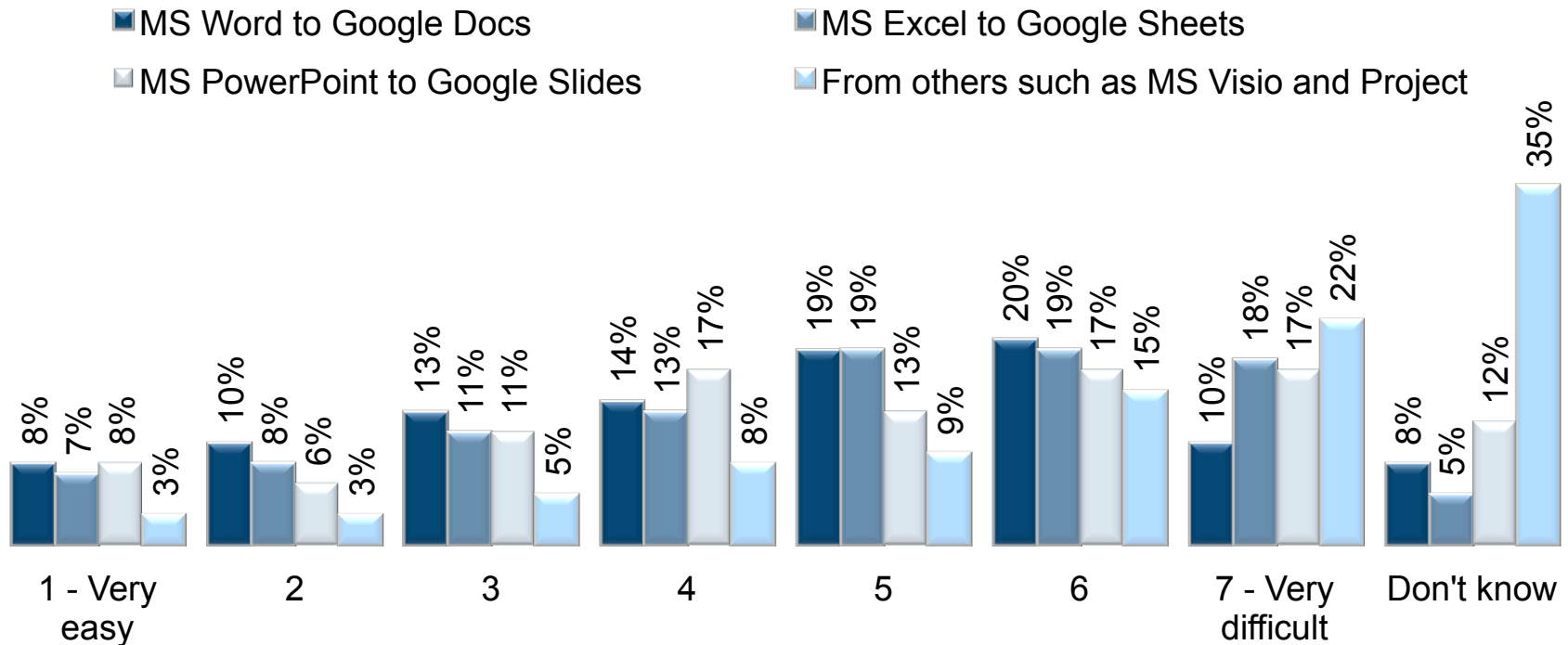
Q8b. What are the reasons for continuing to invest in and use MS Office applications?

Source: Frost & Sullivan

Migration from Microsoft Office to Google Apps

Of those administrators from organizations who did successfully migrate at least some of their infrastructure to Google Apps and the cloud, they cite the transition between Microsoft Word and Google Docs to be least difficult, relative to migrating away from the rest of the Microsoft Office suite.

Migration from Microsoft Office to Google Apps



Base: Filtered respondents, admins using Microsoft Word (n=613), Microsoft Excel (514), Microsoft PowerPoint (n=389), other Microsoft products (n=624)
Q8d. How difficult is it to migrate users in your organization from Microsoft Word/Excel/PowerPoint to Google Docs/Sheets/Slides?

Source: Frost & Sullivan

Motivations and Needs

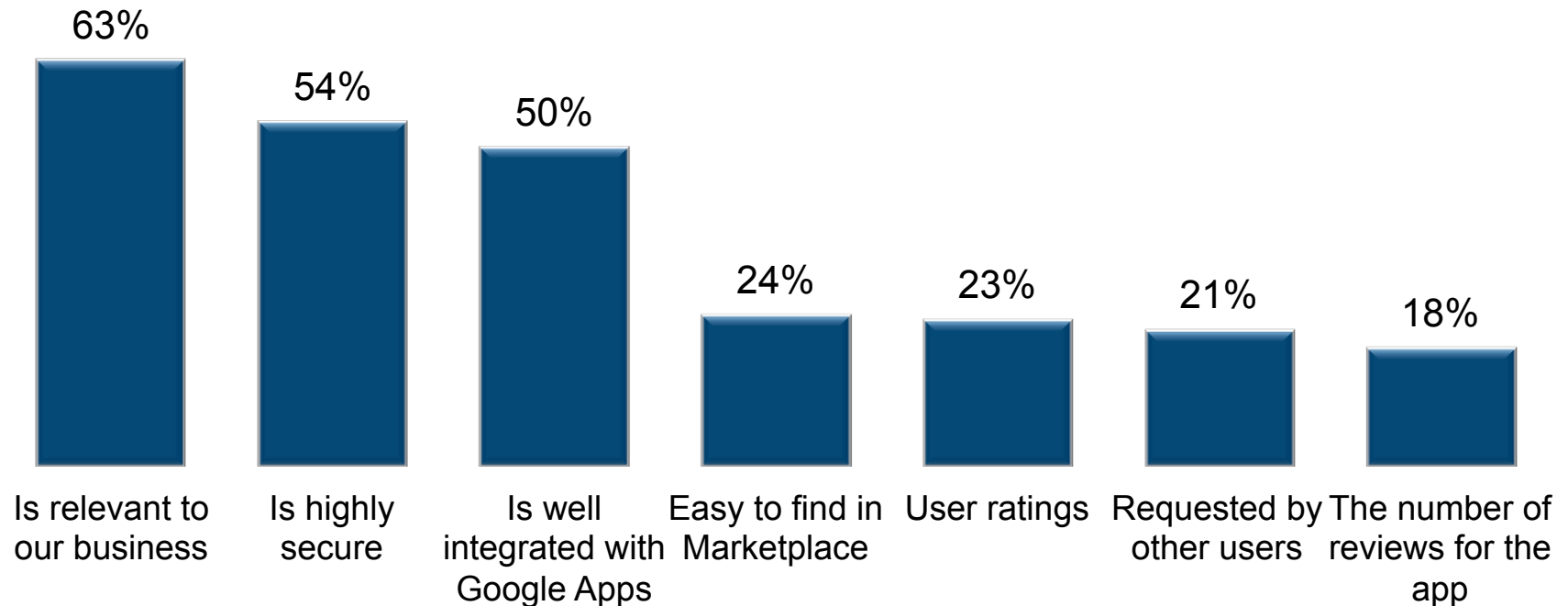
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Factors Influencing Installation of Marketplace Apps

Given the opportunity to install third-party applications, most would choose those that are relevant to their business and very secure. Half would also look for applications that integrate well with the Google Apps suite.

Factors Influencing Installation of Marketplace Apps (rated as Very Important)



Base: All admins (n=738).

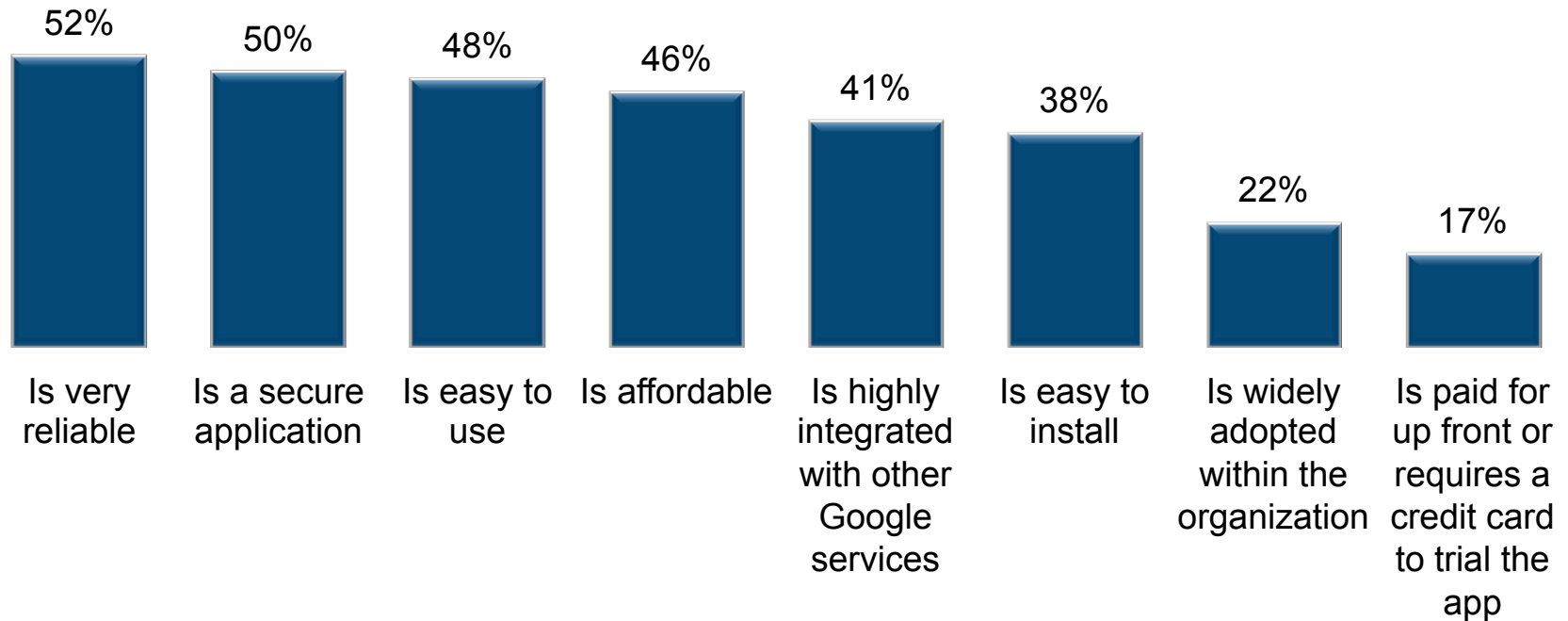
Q14. If the decision was entirely up to you to install an app from the Google Apps Marketplace how important is each of the following? Rated as Very important

Source: Frost & Sullivan

Factors Influencing Satisfaction with Marketplace Apps

They are primarily satisfied with apps that are reliable and secure, and are only minimally discouraged by applications that require payment up front or credit card information for a trial.

Factors Influencing Satisfaction with Marketplace Apps (rated as Very Influential)



Base: All admins (n=738).

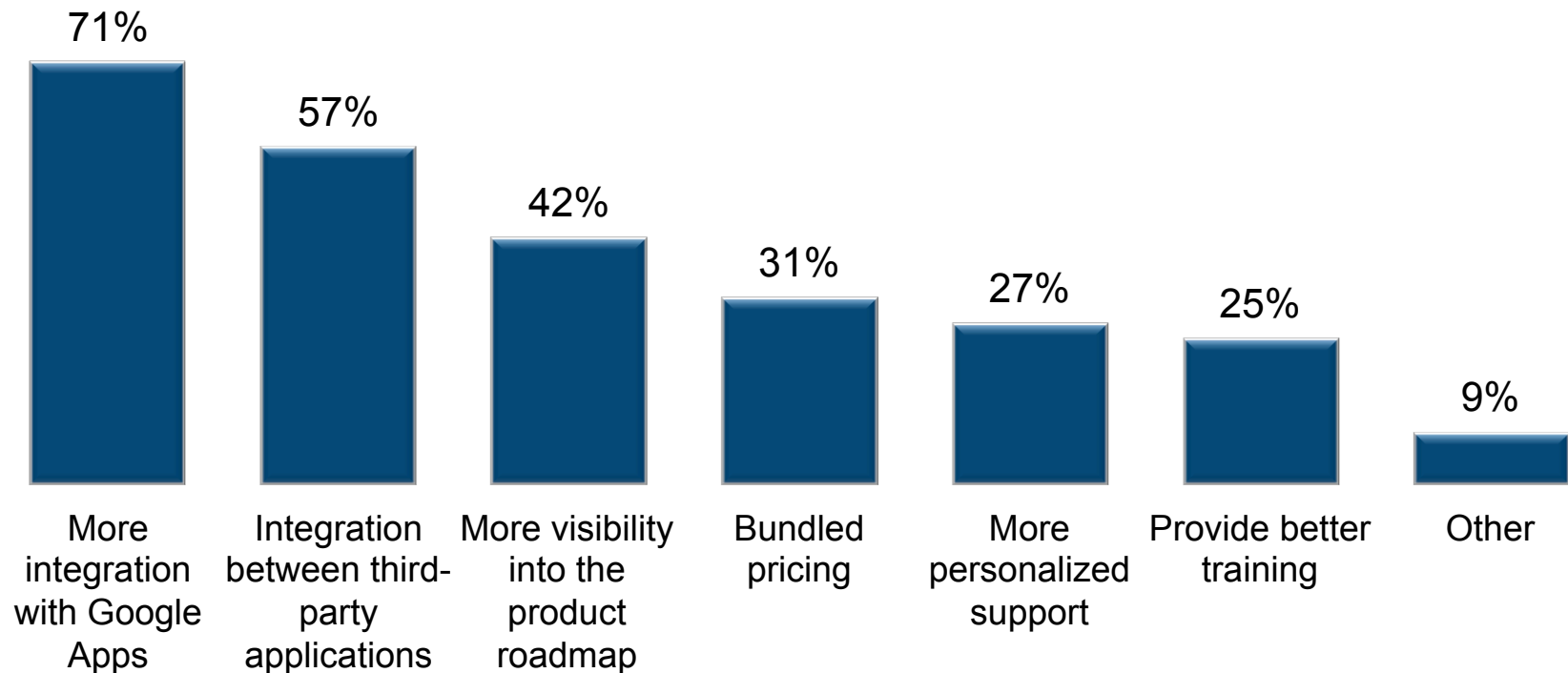
Q13. Please indicate how much influence each of the following has on your overall satisfaction with a Marketplace application? Rated as Very influential

Source: Frost & Sullivan

Desired Features of Marketplace Apps

When choosing Marketplace apps, admins see integration between third-party applications and Google Apps, or other third-party apps, as the most significant areas for improvement.

Desired Features of Marketplace Apps



Base: All admins (n=738).

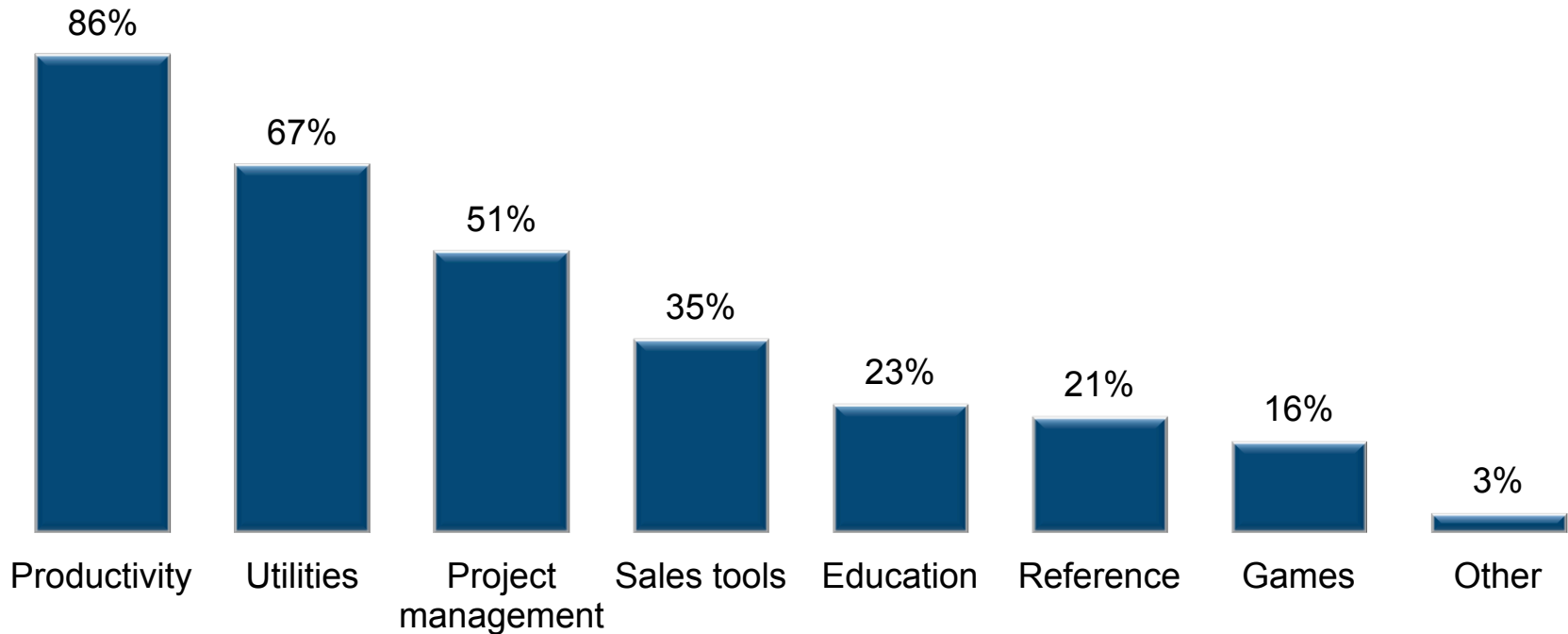
Q12. How can Marketplace application vendors improve to better fulfill customers' needs? Select as many as apply.

Source: Frost & Sullivan

Applications of Greatest Interest

Administrators are most likely to choose productivity or utilities apps.

Application Categories of Greatest Interest



Base: All admins (n=738).

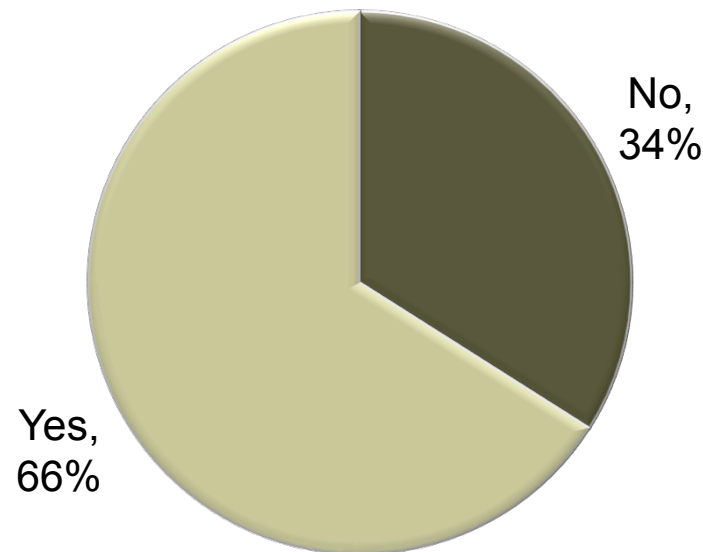
Q28. Which category of applications are you most interested in?

Source: Frost & Sullivan

Personal Funds Spent on Workplace Applications

Most administrators are willing to spend their own money on work-related apps that help improve their performance. Admins buy an average of 2.4 workplace applications with their own money—and IT admins, specifically, buy 4.

Willingness to Spend Personal Funds on Ideal Work App



Base: All admins (n=738).

Q25. For what you consider the ideal work application, would you pay for it out of your own pocket?

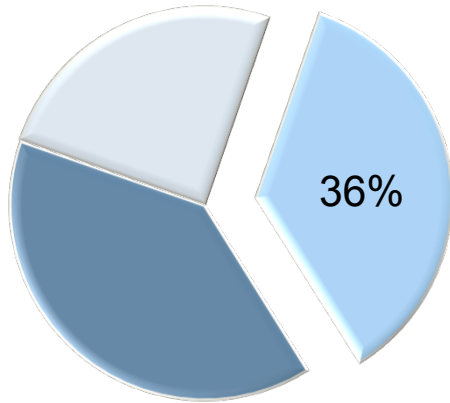
Source: Frost & Sullivan

End-users

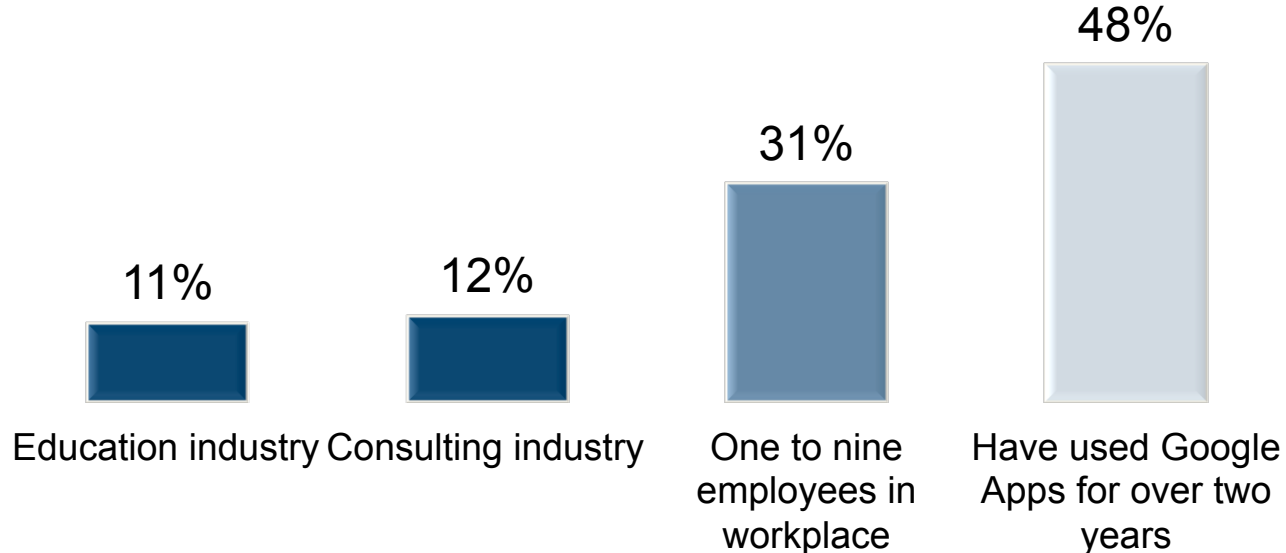
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Profile of End-users



I am an end-user of Google Apps—I work in a management position at a small company that regularly deals with clients. At home, I use basic apps like Gmail or social networking tools like Google+, and I don't have a need for anything more advanced. As my workplace moves to the cloud, I am keen to embrace the Google Apps suite even though I need to have some access to MS Office to maintain archived files.



Source: Frost & Sullivan

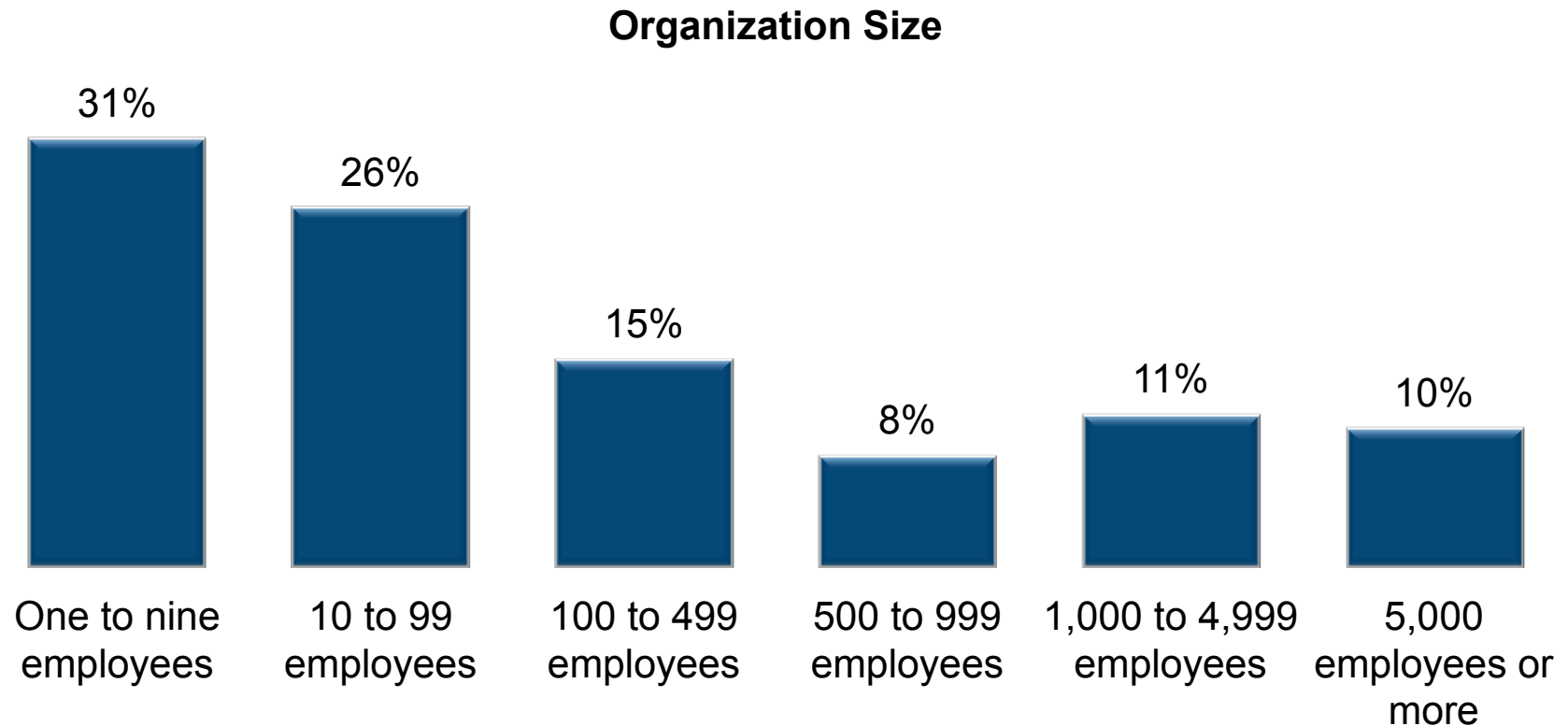
Demographic Profile

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Organization Size

They, too, work in small organizations, with 57% in a company of less than 100 employees and a median of 60 employees overall.



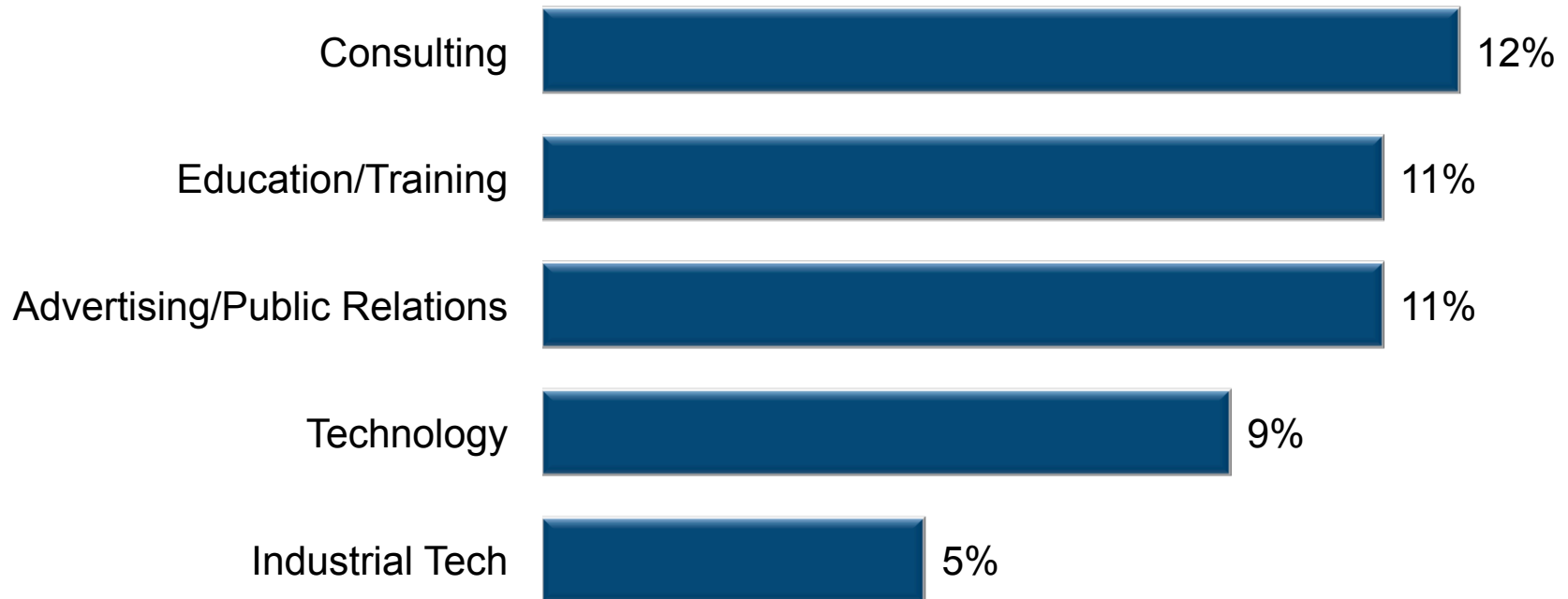
Base: End-users (n=420).

Q30. What is the number of employees across your entire organization worldwide, including all of its branches, divisions, and subsidiaries? Source: Frost & Sullivan

Industry Sector

They generally work in industries dealing directly with customers, such as consulting, education, or public relations.

Top Industry Sectors



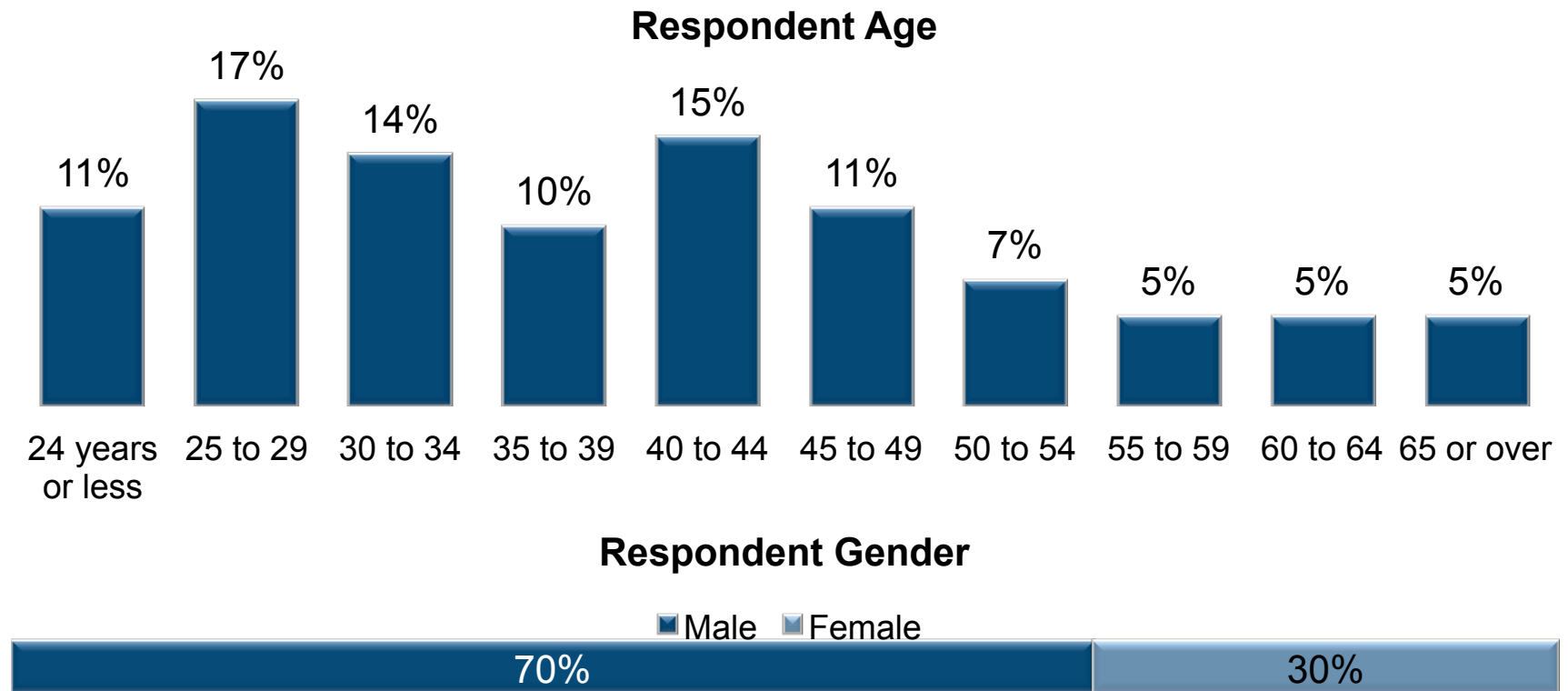
Base: End-users (n=420).

Q31. Which of the following industry sectors best describes your company?

Source: Frost & Sullivan

Respondent Age and Gender

They are younger, on average, than administrators—with a proportionately larger number of end-users in the 25 to 29 age bracket.



Base: End-users (n=420).

Q33. Which of the following categories contains your age?

Source: Frost & Sullivan

Application Usage and Satisfaction

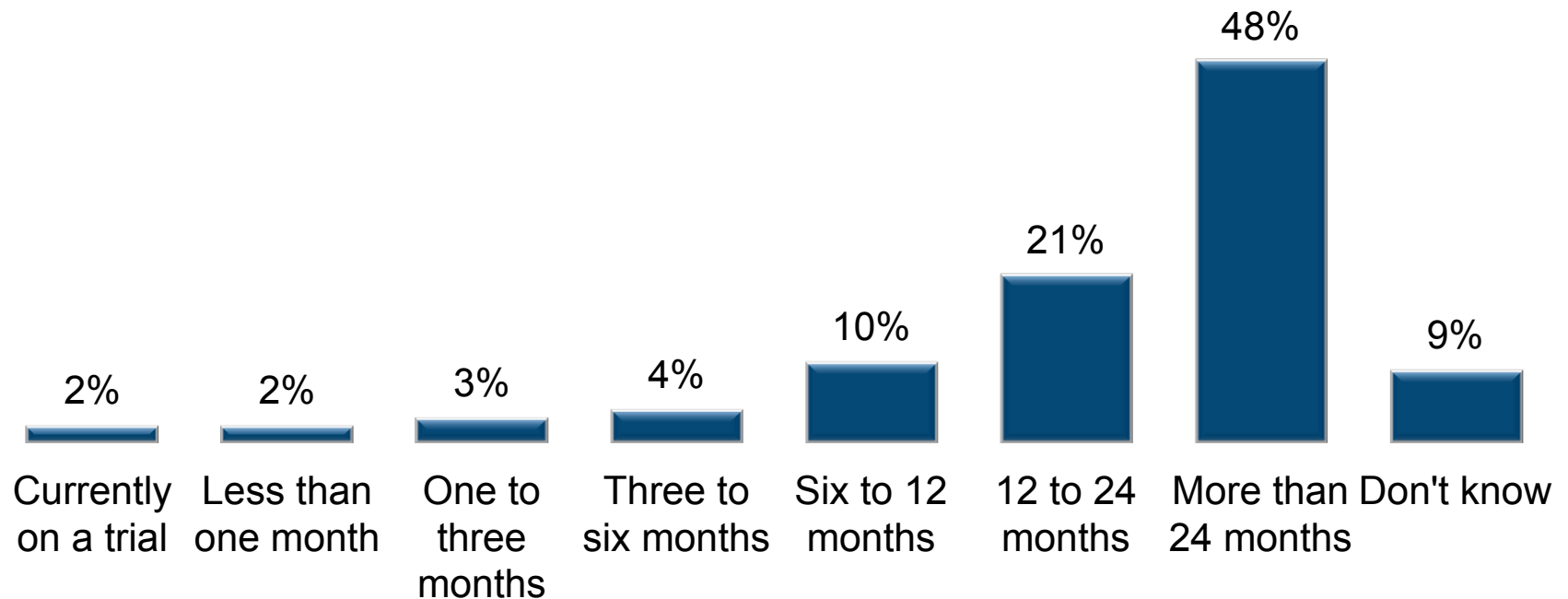
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Time Spent on Google Apps

Nearly 70% of end-users work in organizations that have used Google Apps for at least one year.

Time Spent on Google Apps



Base: End-users (n=420).

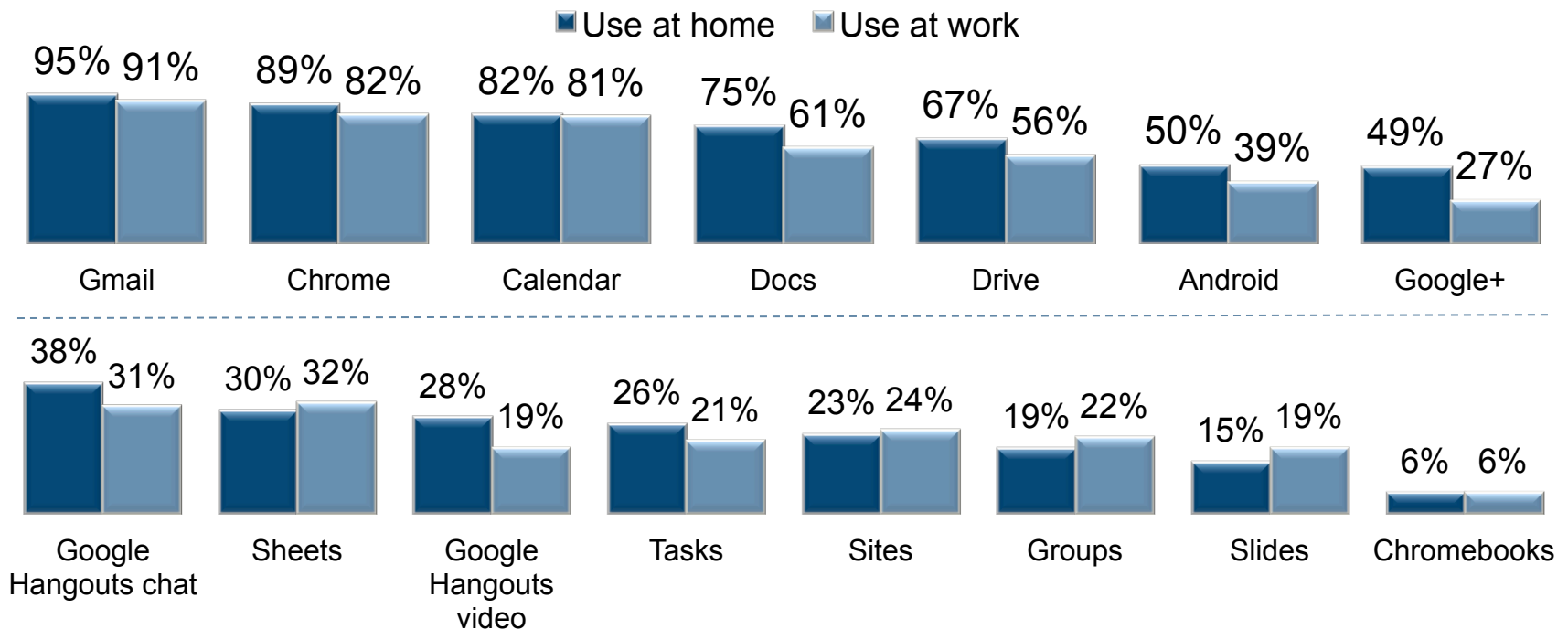
Q3. How long has your organization been using Google Apps?

Source: Frost & Sullivan

Google Applications Used at Home and in the Workplace

They typically use popular apps like Gmail and Chrome both at home and in the workplace. However, their usage of communication and networking apps like Google+ and Google Hangouts is significantly lower than admins.

Google Applications Used at Home and in the Workplace



Base: End-users (n=420).

Q4. Which of the following Google Apps or products do you use for either business or personal use?

Source: Frost & Sullivan

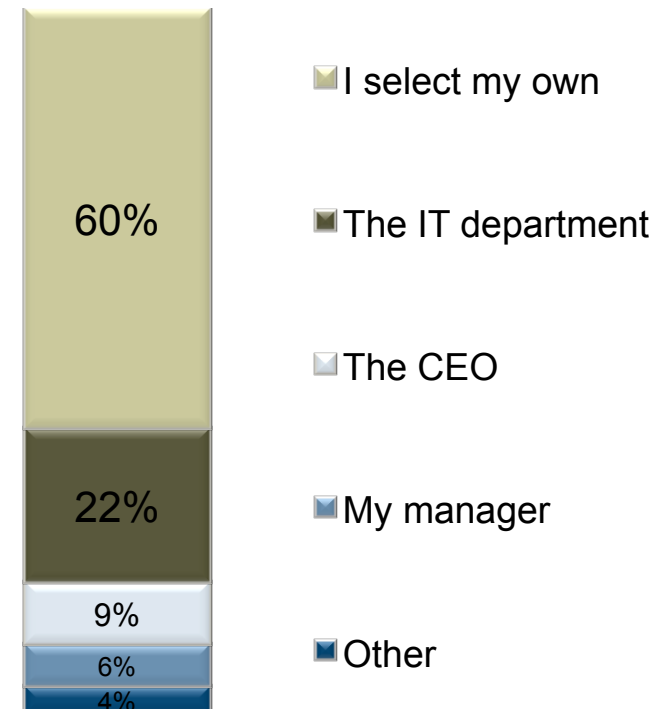
Web Applications in the Workplace

Like administrators, they are most likely to use calendar and communication web apps and 60% of end-users are responsible for choosing their own applications.

Types of Web Applications Used



Responsibility for Choosing Web Applications



Base: End-users (n=420).

Q21c. What type of web applications do you use?

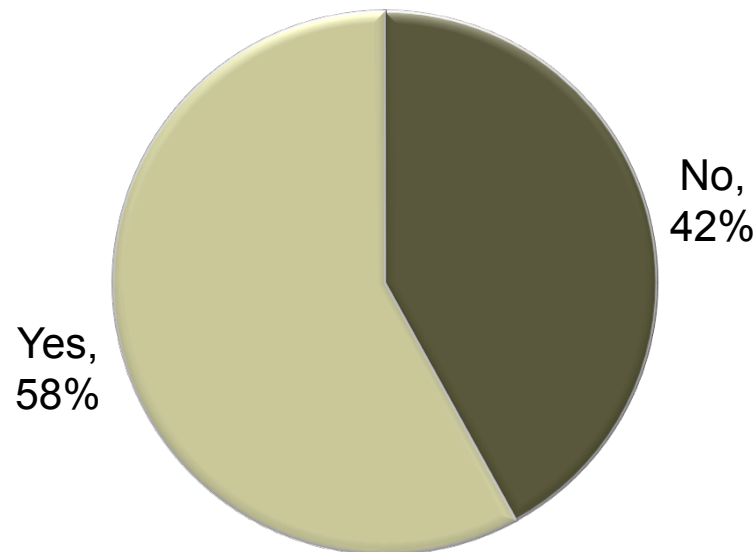
Q22. Who selects the web applications used at your workplace?

Source: Frost & Sullivan

Personal Funds Spent on Workplace Applications

On average, 58% of end-users are willing to spend their own money on the ideal work-related application—typically owning two workplace apps that they bought on their own.

Willingness to Spend Personal Funds on Ideal Work App



Base: End-users (n=420).

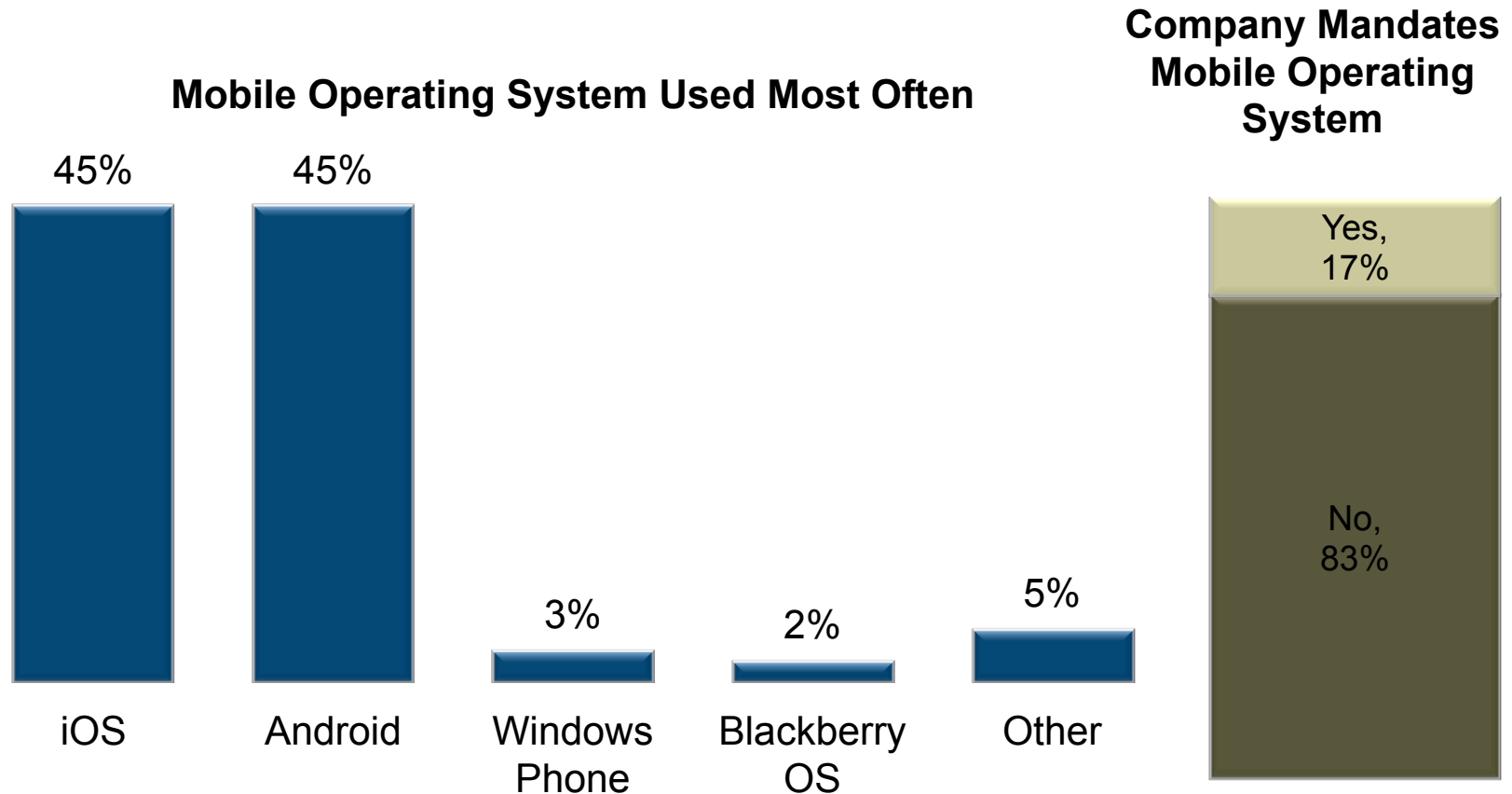
Q24. How many applications have you purchased with your own money to do your job? Do not include applications that you have later expensed to your company and were reimbursed.

Q25. For what you consider the ideal work application, would you pay for it out of your own pocket?

Source: Frost & Sullivan

Mobile Operating System Used Most Often

With most end-users not having a specific mobile operating system mandated by their company, 45% each choose Apple's iOS or Google's Android.



Base: End-users (n=420).

Q17. Which one of the following mobile operating systems do you use most often? Select one answer only.

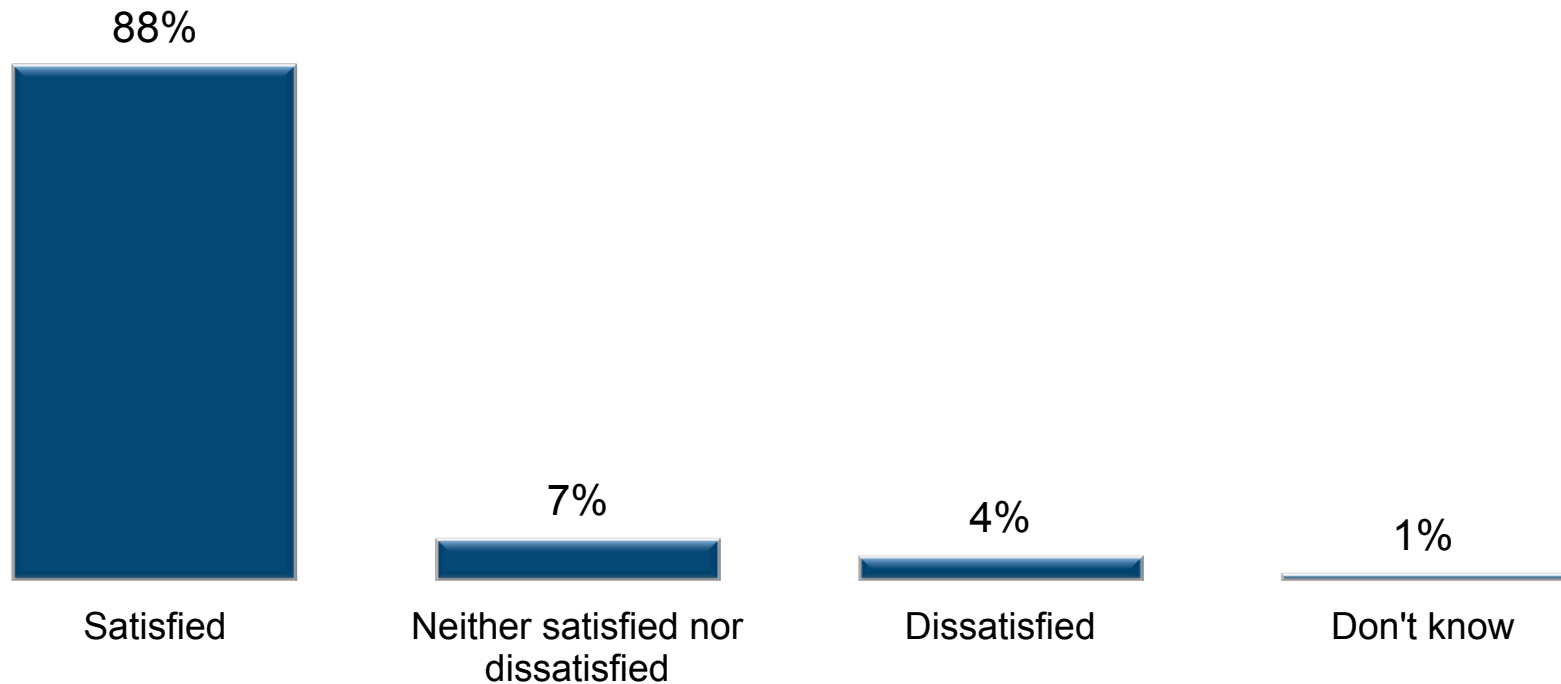
Q18. Is the mobile operating system you use most often mandated by your company?

Source: Frost & Sullivan

Overall Satisfaction with Google Apps

End-users are nearly as satisfied with Google Apps as administrators.

Overall Satisfaction with Google Apps



Base: End-users (n=420).

Q5. Which of the following best describes your overall satisfaction with Google Apps?

Source: Frost & Sullivan

Bring-Your-Own-Device Adoption

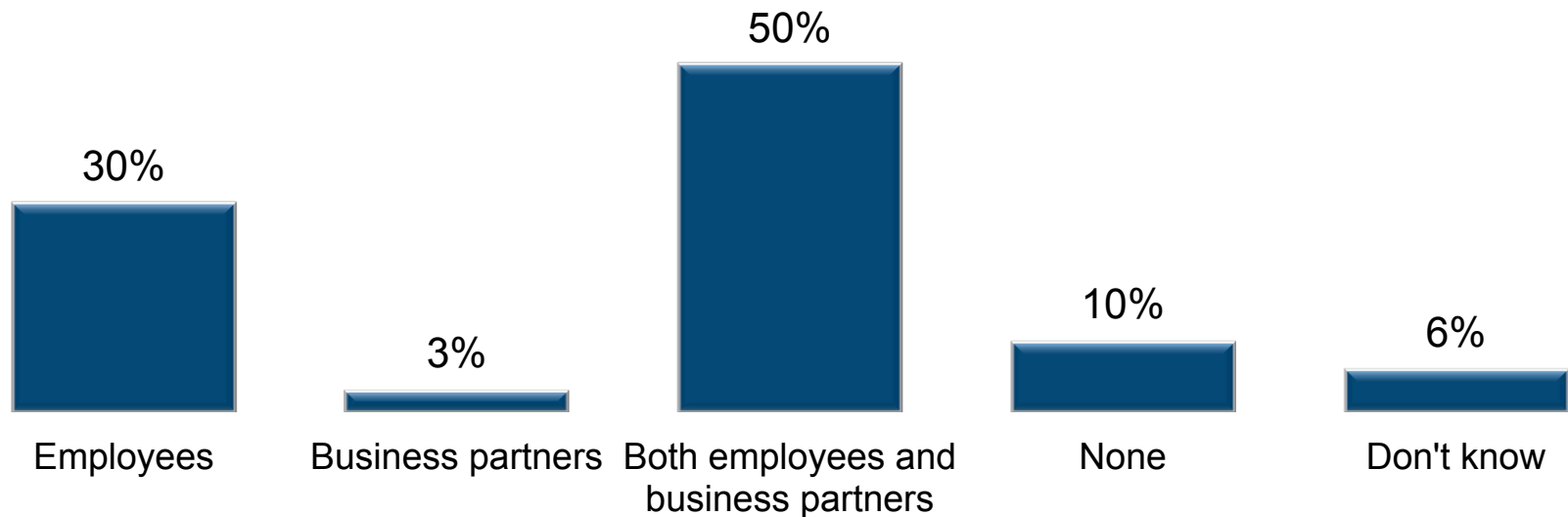
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Organizational *Bring-Your-Own-Device* Policy

Eighty-three percent of respondents work in organizations that support a *bring-your-own-device* (BYOD) policy, with nearly all of these supporting employee-owned devices.

Users Who Can Connect Mobile Devices in BYOD Network



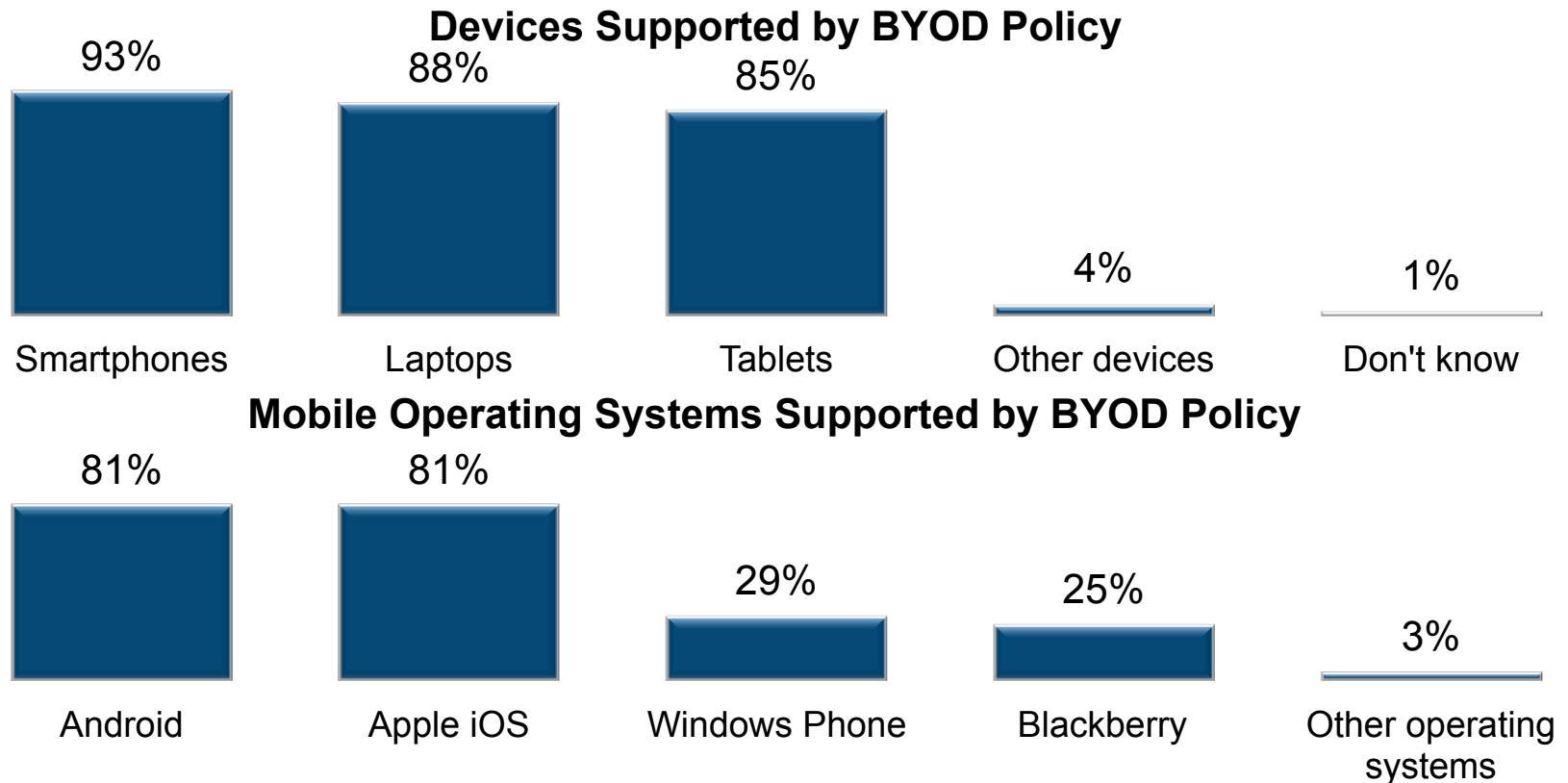
Base: All respondents (n=1,158).

Q19a. Does your organization allow users-either employees or business partners-to use their own device? This is sometimes called bring-your-own-device or BYOD.

Source: Frost & Sullivan

Bring-Your-Own-Device Support

Most BYOD networks allow smartphones, laptops, and tablets on the Android or Apple iOS operating systems.



Base: Filtered respondents, those from organizations which support BYOD policies (n=972).

Q19b. Which of the following user-owned devices are allowed to connect to your network?

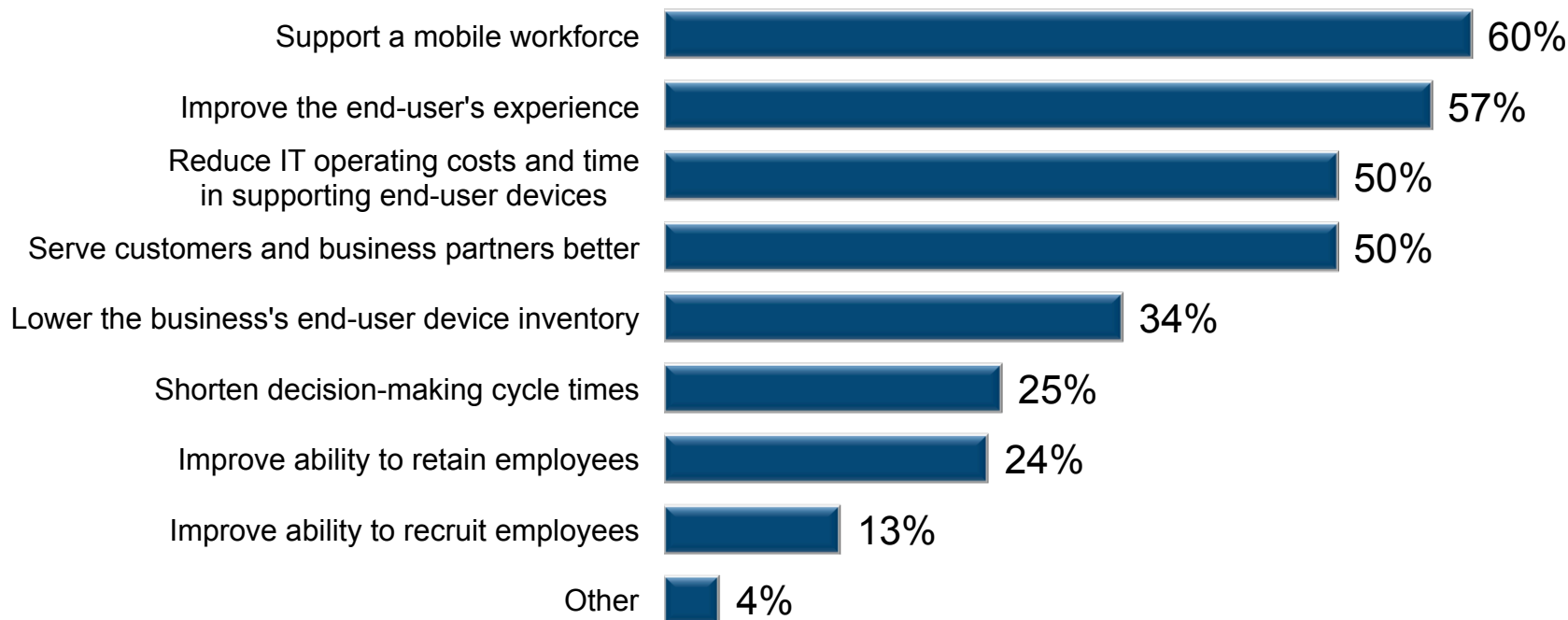
Q19c. What mobile operating systems are supported for employee, or partner, owned devices?

Source: Frost & Sullivan

Reasons for Supporting *Bring-Your-Own-Device* Policies

Admins from these organizations choose to support BYOD policies to facilitate a mobile, remote workforce and improve the experience of their end-users. Fifty percent also feel that BYOD policies reduce IT operating costs and allow for improved customer service.

Organizational Reasons for Supporting BYOD Policies



Base: Filtered respondents, admins from organizations which support BYOD policies (n=637).
Q19d. What are the primary business reasons for supporting employee or partner owned devices?

Source: Frost & Sullivan

Cloud Alliance for Google Apps

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Cloud Alliance for Google Apps

About the Cloud Alliance for Google Apps

The Cloud Alliance for Google Apps is comprised of the leading independent software vendors in the Google Apps ecosystem. Member companies provide software solutions covering a variety of objectives including management and security, backup, project management, productivity, unified communications, conference calling, workflow infrastructure, CRM, migration services and help desk support.

Our Members

BetterCloud

Esna

Fujitsu RunMyProcess

Insightly

Lucidchart

ShuttleCloud

Smartsheet

Spanning

Yesware

UberConference

Zendesk

Source: Frost & Sullivan

Cloud Alliance for Google Apps (continued)

Our Mission

Historically, application marketplaces have played a huge role in the adoption of many of the largest, most successful software platforms. As such, the Cloud Alliance for Google Apps strives to increase the visibility of the Google Apps Marketplace and Chrome Web Store by providing key resources, industry best practices and other market data to key stakeholders including independent software vendors, resellers, Googlers, IT admins, end-users and the Google Apps ecosystem as a whole.

One such resource includes the Cloud Alliance for Google Apps' bi-annual *State of the Google Apps Ecosystem* report conducted in partnership with Frost & Sullivan.

Source: Frost & Sullivan