# Businesses at Work

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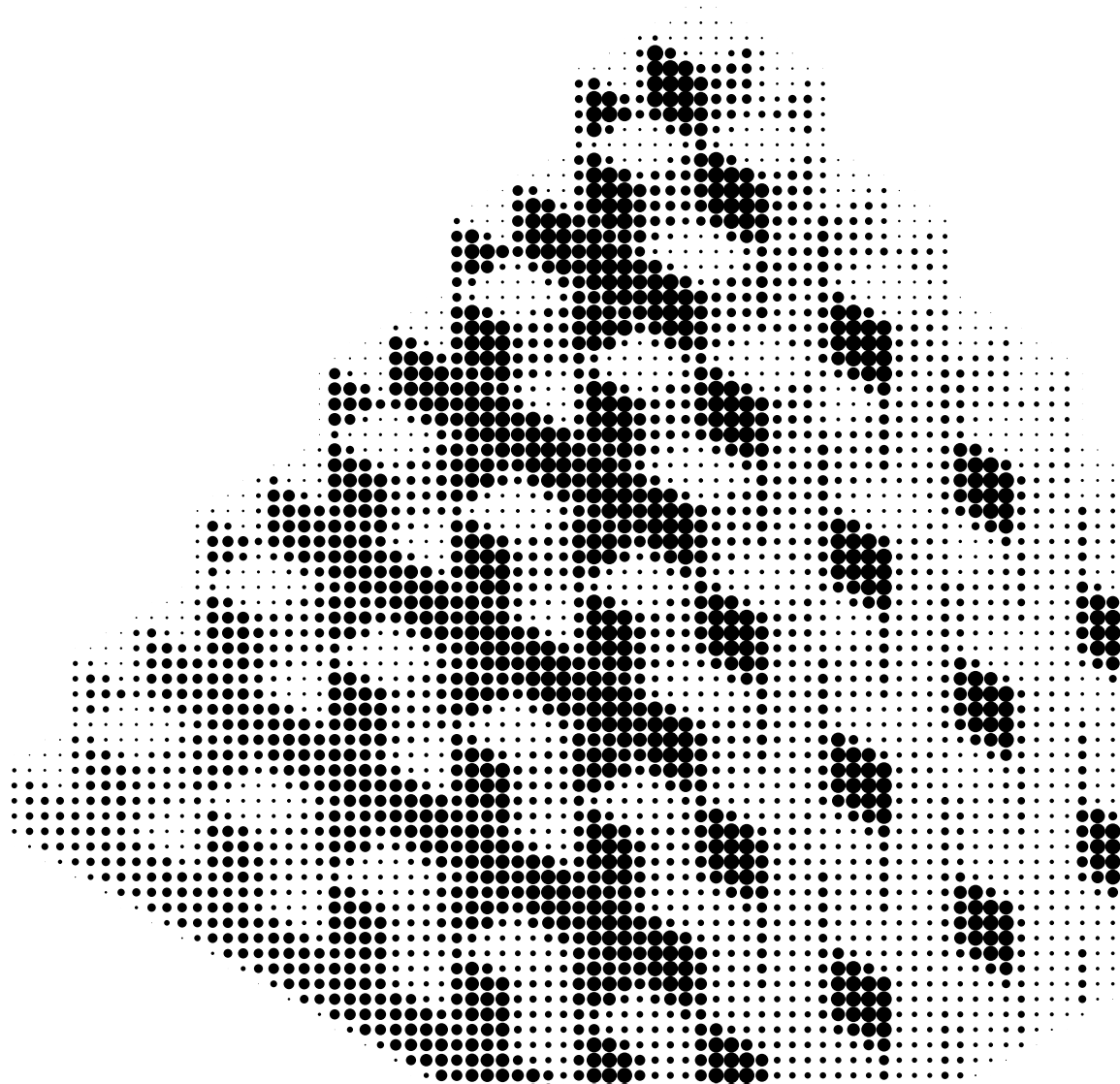
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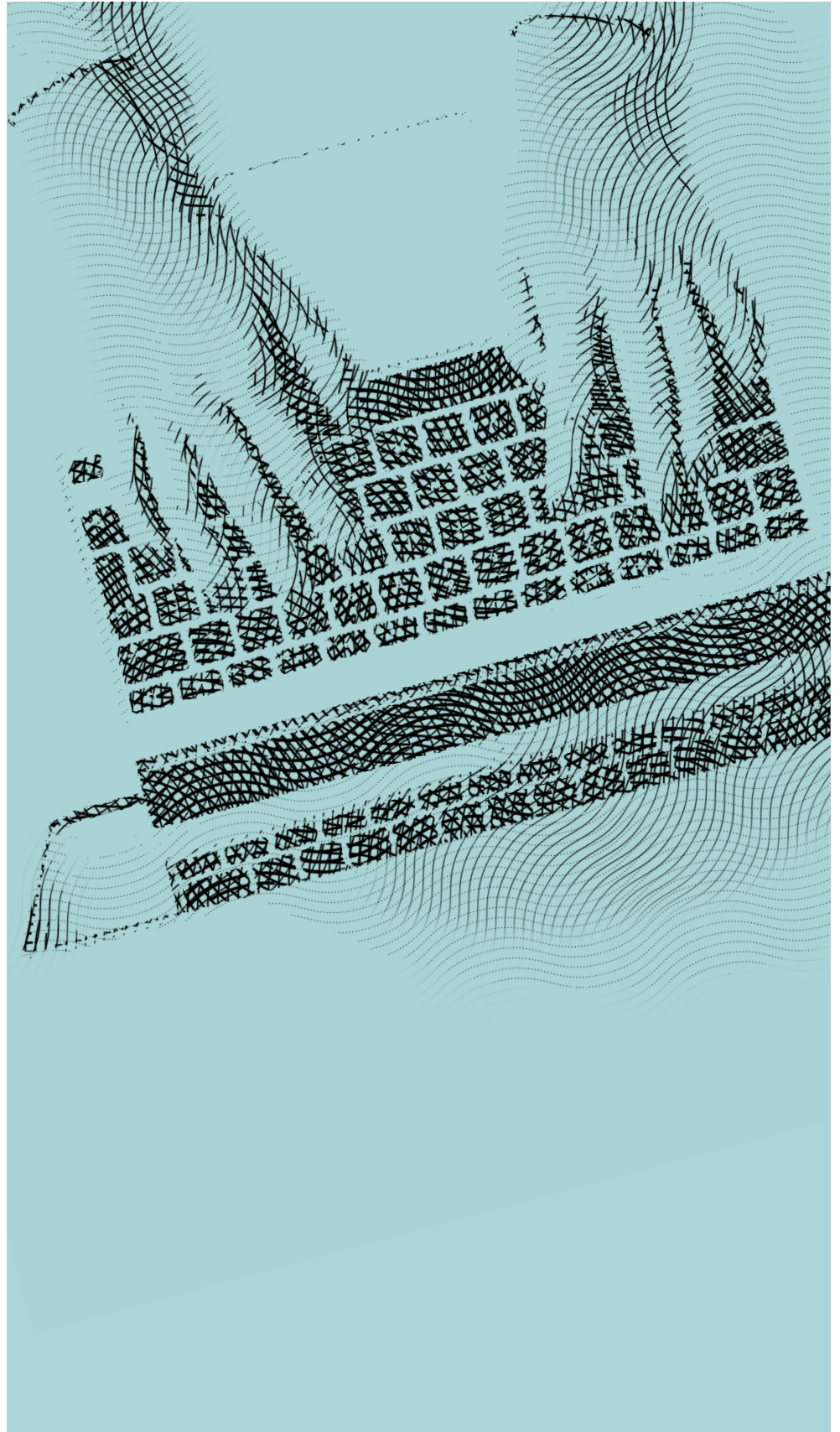
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Contents

Welcome to a supplemental Businesses at Work report, prepared for the GGV Capital Evolving Enterprise conference. Our report dives into how organizations and people work today — exploring workforces and customers, and the applications and services they use to be productive. Our most recent annual **Businesses at Work report** launched in January 2021. This update dips into fresh data, revealing some important changes in how companies are gearing up for 2021.

Last spring, as the pandemic became a global concern, our worlds were flooded with change. We turned to technology to stay afloat. Families scrambled to get equipped for remote learning, companies rushed to support their remote workforces, and organizations quickly developed new online experiences for customers. As the pandemic accelerated, tech solutions once preferred only by "early adopters" became survival tools for companies across all industries, and the population as a whole.

It's from this unprecedented lens that we view the data from Okta's more than 10,000 customers and the Okta Integration Network (OIN), which includes over 7,000 integrations with cloud, mobile and web apps, as well as IT infrastructure providers.

Our top apps underscore the new necessities of remote work: collaboration, security, employee engagement... and a well-equipped home office. In our latest data, hot collaboration tool Miro has moved up from second place to become our fastest growing app. Amazon Business, which held the distinction in 2020, now claims second place, just ahead of collaboration tool Figma and project management tool monday.com. For the first time ever, we see AI-based sales and marketing tools in our fastest growing rankings with the arrival of Gong and Salesforce Marketing Cloud. Organizations are still moving quickly to protect remote workers with next-gen security tools, such as Fortinet FortiGate. And HR teams continue to invest in employee engagement tools such as Lattice to supplement their existing resources.

## Methodology: how did Okta create this report?

To create our **Businesses at Work reports**, we rely on data from Okta customers. We anonymize Okta customer data from our network of thousands of companies, applications, and IT infrastructure integrations, as well as millions of daily authentications and verifications from countries around the world. Our customers and their employees, contractors, partners, and customers use Okta to log in to devices, websites, apps and services, and leverage security features to protect their sensitive data. They span every major industry and vary in size, from small businesses to some of the world's largest organizations, with hundreds of thousands of employees or millions of customers.

As you read this report, keep in mind that this data is representative of Okta's customers, the applications and integrations we connect to through the OIN, and the ways in which users access these tools through our service. The terms "app" and "tool" are used throughout this report to refer to applications, services, and integrations that are available through the OIN. The trends we describe for Okta's Microsoft 365 customers may differ for those Microsoft 365 customers who do not use Okta (i.e., those using Azure Active Directory or other identity platforms that do not provide strong cross app integration support.)

Each year, we look at app popularity in two different ways: first, by number of customers with an app deployed, and second by the number of active unique users, defined as users who have logged into an app via Okta at least one time in the past 30 days.

We have worked carefully to standardize our data. Unless otherwise noted, this report presents and analyzes data from February 1, 2020 to January 31, 2021.

The data included in this report is limited to Okta customers that have deployed at least one app through the Okta Integration Network. This report looks at apps deployed for corporate use.
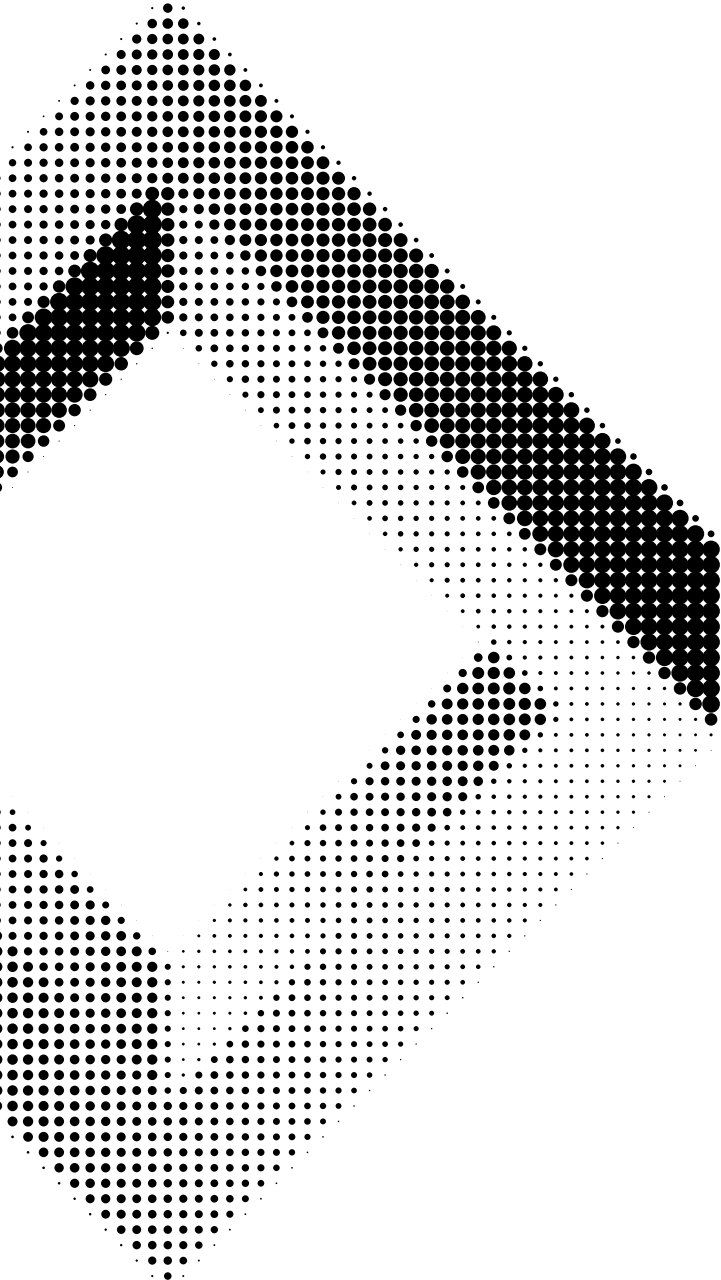
## Apps at work: our most popular apps

**Remote work and security tools have the wind in their sails**

We have seen some exciting changes in our top ranks. Cloud platform AWS has risen steadily from sixth place five years ago to become the second most popular app by number of customers. Tools enabling collaboration, including Zoom and DocuSign, have also jumped in the ranks.

Customers have been investing in the tools they need to ride out a challenging year. Looking at the most popular apps by number of customers, tools enabling collaboration and security have seen the largest gains.

Microsoft 365 continues to hold the top spot, but the past year has seen a significant shakeup in the overall ranks. With 36% year-over-year growth since last January, AWS jumped into the second place spot, which had previously been held by Salesforce since our first report in 2015. Salesforce now takes third. Google Workspace holds onto its fourth place position for the fourth year in a row, but in the lower ranks, the waters are churning.

With 64% year-over-year growth, driven in part by the global move to remote work, Zoom surged past the steady growth of Slack and the Atlassian Product Suite to claim fifth place — especially impressive considering Zoom first joined the ranks as recently as 2018. In the past year, DocuSign jumped three spots to eighth place as people everywhere needed to sign documents digitally. And after three years as a fastest growing app, KnowBe4, which provides security awareness training, graduated to become one of the most popular apps by number of customers.

Note: the Atlassian Product Suite now includes Trello, as well as Confluence, Jira, and Bitbucket, which are frequently accessed together via a subscription to Atlassian Access.

## Most Popular Apps by Number of Customers

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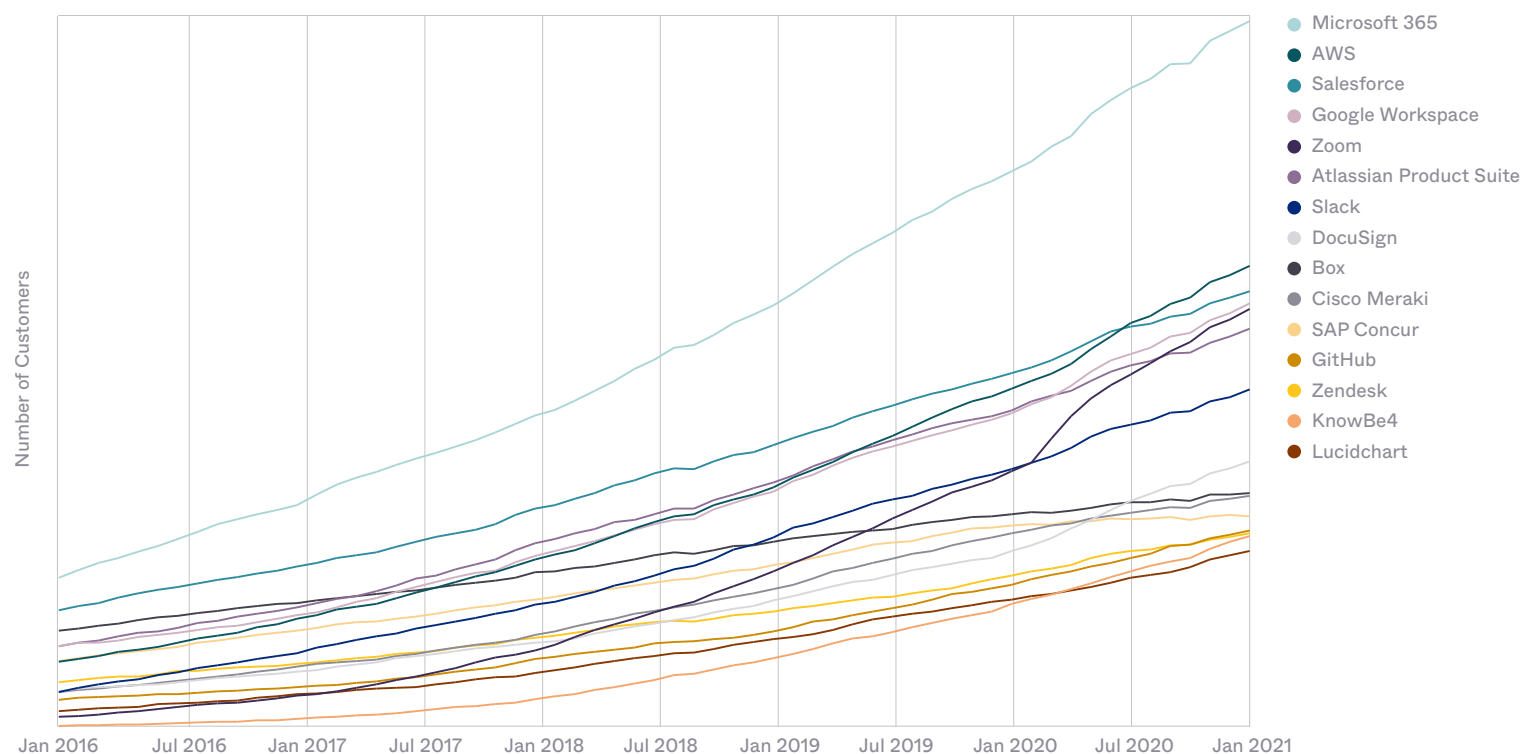
**Apps make the world go 'round**

When we break out our most popular apps by region, we find some striking differences. At the top of our ranks, we see that the second-place global rank for AWS is driven by its strong growth in EMEA and APAC, where it has seen over 33% growth since April, 2020, compared to 25% growth in North America during the same time period. This is a significant gain, even since this year's annual report, which observed 25% growth in APAC and EMEA and 16% growth in North America between April and October.

For many apps, their popularity in North America drives their rank on the charts. Salesforce and Zoom's global ranks are underpinned by their popularity in North America: each ranks two spots lower in APAC and three spots lower in EMEA.

But some apps find their sweet spots outside of North America. While the Atlassian Product Suite (headquartered in Sydney, Australia) ranks sixth on our global list and in North America, it ranks third in APAC and fourth in EMEA, beating out such popular tools as Salesforce and Zoom. Other examples of higher rankings in EMEA include Slack (1 spot higher than in North America), Zendesk (6 spots higher), and GitHub (3 spots higher).

Some apps that don't appear in our global rankings make cameo appearances in regional breakdowns. Jamf Pro, our #1 fastest growing app in 2018 and a recurring fastest growing app through 2020, appears in the EMEA top 15 where it recently overtook social media giant Twitter. Twitter left our global top apps in 2017, but still claims a #14 rank in EMEA. And APAC customers' deployment puts Mimecast (email security), ServiceNow (IT service management support), Palo Alto Networks GlobalProtect (network security), and Xero (small business accounting, headquartered in Wellington, NZ), into APAC's top 15.

App rankings change quickly. We see some significant jumps just in the period since this year's annual report. In EMEA, Google Workspace passed Atlassian Product Suite to take the #3 spot, an interesting contrast to its #5 rank in North America and APAC. DocuSign saw some ups and down, with gains in EMEA (up one spot since this year's annual report, now ahead of GitHub), but a drop in APAC (down 2 spots). Since our annual report, the APAC ranks show Palo Alto Networks GlobalProtect moved up two spots to #11, Box moved up a spot to #13, and GitHub joined at #14.

## Most Popular Apps by Number of Customers, by Region

▲ **Increase vs global**
▼ **Decrease vs global**

| | Global | North America | EMEA | APAC |
|---|---|---|---|---|
| 1 | Microsoft 365 | Microsoft 365 | Microsoft 365 | Microsoft 365 |
| 2 | AWS | Salesforce ▲ | AWS | AWS |
| 3 | Salesforce | AWS ▼ | Google Workspace ▲ | Atlassian Product Suite ▲ |
| 4 | Google Workspace | Zoom ▲ | Atlassian Product Suite ▲ | Salesforce ▼ |
| 5 | Zoom | Google Workspace ▼ | Salesforce ▼ | Google Workspace ▼ |
| 6 | Atlassian Product Suite | Atlassian Product Suite | Slack ▲ | Zoom ▼ |
| 7 | Slack | Slack | Zoom ▼ | Slack |
| 8 | DocuSign | DocuSign | Zendesk ▲ | Mimecast ▲ |
| 9 | Box | Box | DocuSign ▼ | ServiceNow ▲ |
| 10 | Cisco Meraki | Cisco Meraki | GitHub ▲ | DocuSign ▼ |
| 11 | SAP Concur | SAP Concur | Cisco Meraki ▼ | Palo Alto Networks GlobalProtect ▲ |
| 12 | GitHub | KnowBe4 ▲ | Box ▼ | Zendesk ▲ |
| 13 | Zendesk | GitHub ▼ | Jamf Pro ▲ | Box ▼ |
| 14 | KnowBe4 | Zendesk ▼ | Twitter ▲ | GitHub ▼ |
| 15 | Lucidchart | Lucidchart | Lucidchart | Xero ▲ |

**Different apps for different folks**

It's no surprise that sectors flock to unique sets of apps. We see differences not only in the absolute ranks, but also in the distance between them.

In every sector, Microsoft 365 takes the top spot among users. In the tech sector, AWS takes an extremely close second, within striking distance of the number deploying Microsoft 365. (In contrast, looking at all industries together, the number of customers deploying Microsoft 365 is 53% greater than those deploying AWS.) Of all industries, the tech sector has the smallest distance between Microsoft 365 and the second-ranked app.

Tech customers prioritize Google Workspace and the Atlassian Product Suite ahead of Salesforce and Zoom. Within the tech sector, Microsoft 365 only claims 14% more Okta customers than does Google Workspace, in contrast to all industries together, where Microsoft 365 claims 67% more customers.

Companies in the healthcare and pharmaceuticals, finance and banking, and education sectors are more likely to deploy Zoom than our overall customer base. This trend existed a year ago, but has become more pronounced: a year ago, when Zoom was our seventh most popular app overall, the video conferencing favorite ranked sixth for healthcare and pharmaceuticals, finance and banking, and fifth for education. Now, while Zoom is the fifth most popular app overall, it ranks as the second most popular app in healthcare and third in finance and banking, and education.

Each industry has its own specific needs, and fills them with a few apps which do not appear in the overall top 15 rankings:

- The technology sector ranks PagerDuty at #12 and Jamf Pro at #14
- Healthcare ranks Smartsheet at #11, Veeva Vault at #13, ServiceNow at #14, and Mimecast at #15
- For finance and banking, Mimecast, ServiceNow, and Webex takes #13, #14, and #15, respectively
- Retail ranks Dropbox at #10

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## The fastest growing apps in the tech sector:

## KnowBe4, **70%**

## Jenkins, **66%**

## Palo Alto Networks GlobalProtect and Zoom, **47%**

Year-over-year growth

## Most Popular Apps by Number of Customers, by Industry

▲ Increase vs all
▼ Decrease vs all

| | All Industries | Technology | Healthcare/ Pharmaceuticals | Finance/ Banking | Retail | Education |
|---|---|---|---|---|---|---|
| 1 | Microsoft 365 | Microsoft 365 | Microsoft 365 | Microsoft 365 | Microsoft 365 | Microsoft 365 |
| 2 | AWS | AWS | Zoom ▲ | Salesforce ▲ | Atlassian Product Suite ▲ | Google Workspace ▲ |
| 3 | Salesforce | Google Workspace ▲ | Salesforce | Zoom ▲ | Google Workspace ▲ | Zoom ▲ |
| 4 | Google Workspace | Atlassian Product Suite ▲ | AWS ▼ | AWS ▼ | AWS ▼ | Salesforce ▼ |
| 5 | Zoom | Salesforce ▼ | SAP Concur ▲ | Atlassian Product Suite ▲ | Slack ▲ | AWS ▼ |

## The fastest growing apps

**Companies flock to tools that support remote work**

The past year has been an anomaly for so many reasons, and that's reflected in the record-setting turnover in our fastest growing apps and integrations. This year's annual report was the first time 90% of our fastest growing apps were brand new to the top 10. Now a few months later, two of those apps have already been replaced: in another first, we see AI-based sales and marketing tools in our fastest growing with the arrival of Gong and Salesforce Marketing Cloud. Only data warehousing provider Snowflake, our #1 fastest growing app in 2019 and #7 in 2020, has been able to hold a spot in the fastest growing since 2019.
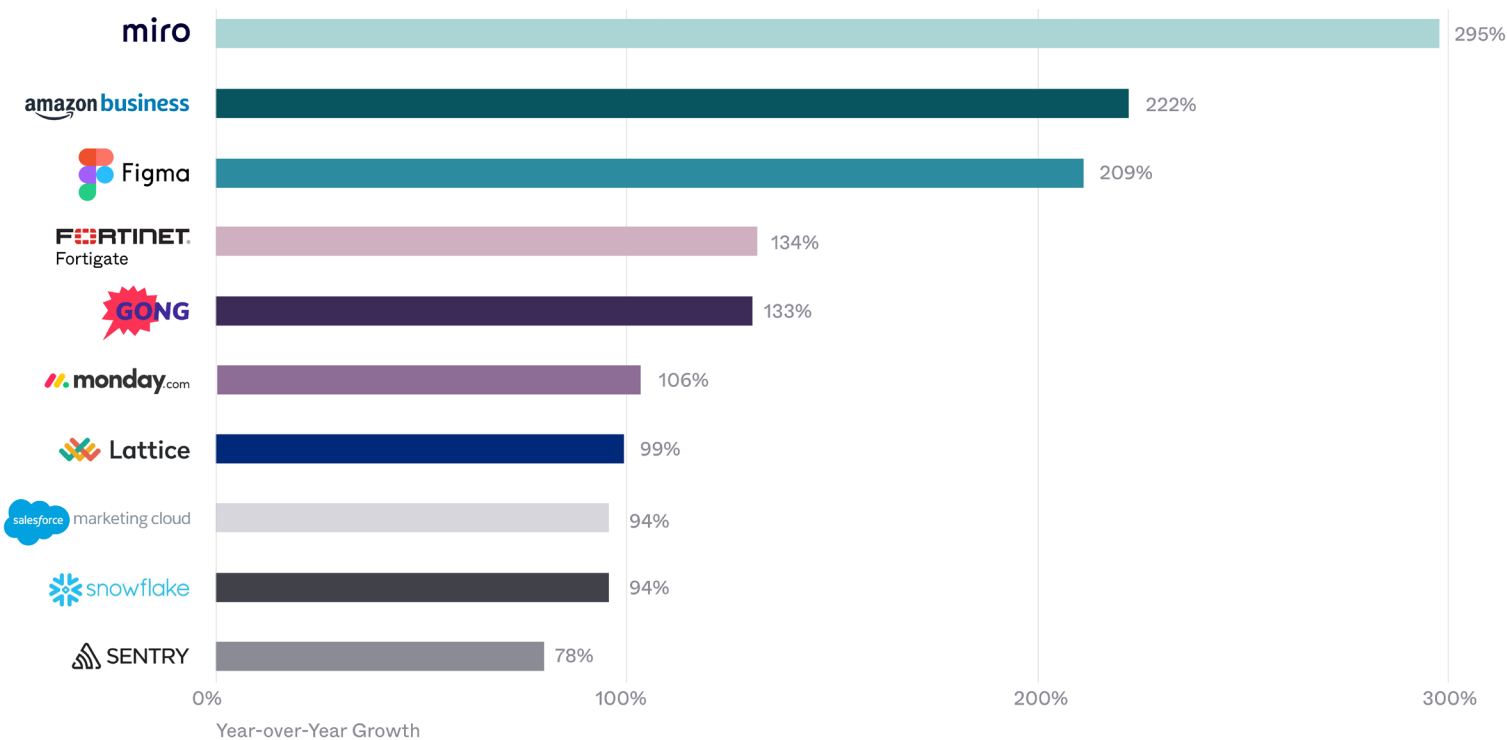
While we always expect frequent turnover — it's tough to maintain explosive rates of growth over multiple years — we see a shift in the type of apps that customers are adopting. In last year's annual report we noted that collaboration apps were being replaced by data- or security-focused tools. This past

year companies needed to enable remote work, which meant supporting at-home workspaces and virtual collaboration, as well as helping employees thrive as they work apart from one another.

Companies continue to invest in security tools as well, but our new arrivals displaced two of the four security-centric apps in our 2020 fastest growing. The debut of sales and marketing tools indicates that companies may be gearing up for new business in the coming months, and they are investing in AI-based tools.

In an era of remote work, collaboration tools are white hot. Congratulations to Miro, an app offering digital whiteboard functionality for teams, which now ranks as our fastest growing app. Miro experienced 295% year-over-year growth; measured by unique users, it was the second fastest growing app (behind Amazon Business) with 562% year-over-year growth. Our third fastest growing app by number of customers is Figma, an interface design and prototyping software that has also been

## Fastest Growing Apps



| App | Year-over-Year Growth |
|---|---|
| miro | 295% |
| amazon business | 222% |
| Figma | 209% |
| FORTINET Fortigate | 134% |
| GONG | 133% |
| monday.com | 106% |
| Lattice | 99% |
| salesforce marketing cloud | 94% |
| snowflake | 94% |
| SENTRY | 78% |

Year-over-Year Growth

adopted by remote workers who need a virtual whiteboard or presentation tool. Both Miro and Figma secured $50 million in funding in April, 2020, a **Series B** for Miro and **Series D** for Figma. And in fourth place, project management tool monday.com gives remote workers a way to collaborate on project management.

This spring, as workers around the world collectively discovered that kitchen bar stools don't make good office chairs, organizations raced to launch tutorials on ergonomics and build online company stores selling stand-up desks and quality webcams. Amazon Business offered an immediate solution to employees who were already comfortable with shopping on Amazon for personal use. This delivered 222% year-over-year growth for the Amazon Business app, making them the second-fastest growing app and the first shopping-centric tool to ever join the ranks.

The fastest growing security tools provide diverse forms of protection. Our fourth fastest growing app, Fortinet FortiGate, provides next-generation firewalls. In tenth place, Sentry provides application monitoring. With employees working remotely, HR departments are providing additional support. Our seventh fastest growing app is Lattice, a people management platform that helps managers develop teams and keep employees engaged, from anywhere. It's noteworthy that an app supporting employee culture is ranking as a fastest growing app. The last HR-related tool to appear in this category was BambooHR, in 2016.

Who's missing? After being the top fastest growing app in 2016 and maintaining a presence on the list for an unprecedented total of four years, Zoom fell off the top 10 list. (Yep, even with a pandemic it's hard to sustain the initial hefty growth achieved by fastest growing apps!) But when broken out by region, Zoom still takes the fastest growing prize in EMEA, and when measured by global unique users, Zoom takes ninth place with 172% year-over-year growth.

## Fastest Growing Apps, by Region

| Region | By Number of Customers | By Unique Users |
|---|---|---|
| North America | Miro<br>**270%** | Amazon Business<br>**716%** |
| EMEA | Zoom<br>**94%** | DocuSign<br>**545%** |
| APAC | AWS<br>**49%** | AWS<br>**71%** |

Year-over-Year Growth

## Remote work: winners and consumer's choice awards

**Taking care of business with apps deployed company-wide**

As COVID-19 spread rapidly in the spring of 2020 and an unprecedented **half of the world's population, over four billion people, went into lockdown**, companies quickly deployed new tools to enable employees to work remotely. Collaboration tools come in every size, color, and flavor, but sometimes having too many options can be overwhelming. What do our customers choose to deploy company-wide for specific collaboration needs? These tools easily walk away with top honors for their specific functionality. This year gave rise to the latest tech stack everyone needs to support a new way of working.

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Top surveying tool SurveyMonkey has seen nearly 21% growth since January 2020, as companies rushed to understand what their employees needed to work remotely.

## Remote Work Stack

| | | | |
|---|---|---|---|
| **Project Management** | smartsheet | **Messaging** | slack |
| **File Sharing** | box | **Wireframing** | Lucidchart |
| **Video Conferencing** | zoom | **Whiteboarding** | miro |
| **Electronic Signatures** | DocuSign | **Note Taking** | Evernote |
| **Surveying** | SurveyMonkey | **Employee Engagement** | Culture Amp |

**Highlights of our remote work stack:**

- Deployment of project management app Smartsheet has grown 161% over the past three years. It boasts around 1.5 times as many Okta customers as its nearest competitor, Asana.

- Box is the top file sharing app, with 57% more Okta customers than its nearest competitor, Dropbox.

- DocuSign is far and away the most popular option for electronic signatures. Deployment has grown 215% in the past three years, and 51% in the past year alone as digital signatures became critical to completing all kinds of transactions. DocuSign has more than eight times as many Okta customers as second-place Adobe Document Cloud.

- Top surveying tool SurveyMonkey has seen nearly 21% growth since January 2020, as companies rushed to understand what their employees needed to work remotely. SurveyMonkey has more than three times as many Okta customers as second-place Typeform.

- Slack ranks clearly as the top messaging tool, with 176% growth in the past three years. Slack has more than ten times as many Okta customers as the second most popular messaging app, Workplace by Facebook.

- Lucidchart is by far the most popular app for diagramming and wireframing. It has enjoyed 228% growth over the past three years, and has ranked as one of our top apps by unique users for the past two years. Lucidchart has three times as many Okta customers as both competitor InVision, and our third fastest growing app, Figma.

- The most popular note taking app, Evernote, has seen a rise and fall in popularity, and now has the same number of Okta customers it did three years ago. We'll keep our eye on competitor Notion, which is rising rapidly through the ranks.

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## **Developers at work:** the most popular tools for building digital experiences

If the first phase of COVID-related technology adoption was to support remote work, the second was to accelerate digital transformation projects and initiatives. Whether consumers are connecting with loved ones, depositing checks, tracking workouts, ordering groceries, or shopping, almost every interaction between consumers and brands is now happening online. This has driven organizations to invest in building delightful digital experiences that are frictionless, personalized, and seamless.

In addition to our workforce identity products, Okta also offers customer identity and access management (CIAM) solutions to help organizations build and scale seamless digital experiences for their customers. This is a growing area of focus for Okta. In this section, we dig into various aspects of how CIAM powers modern customer experiences.
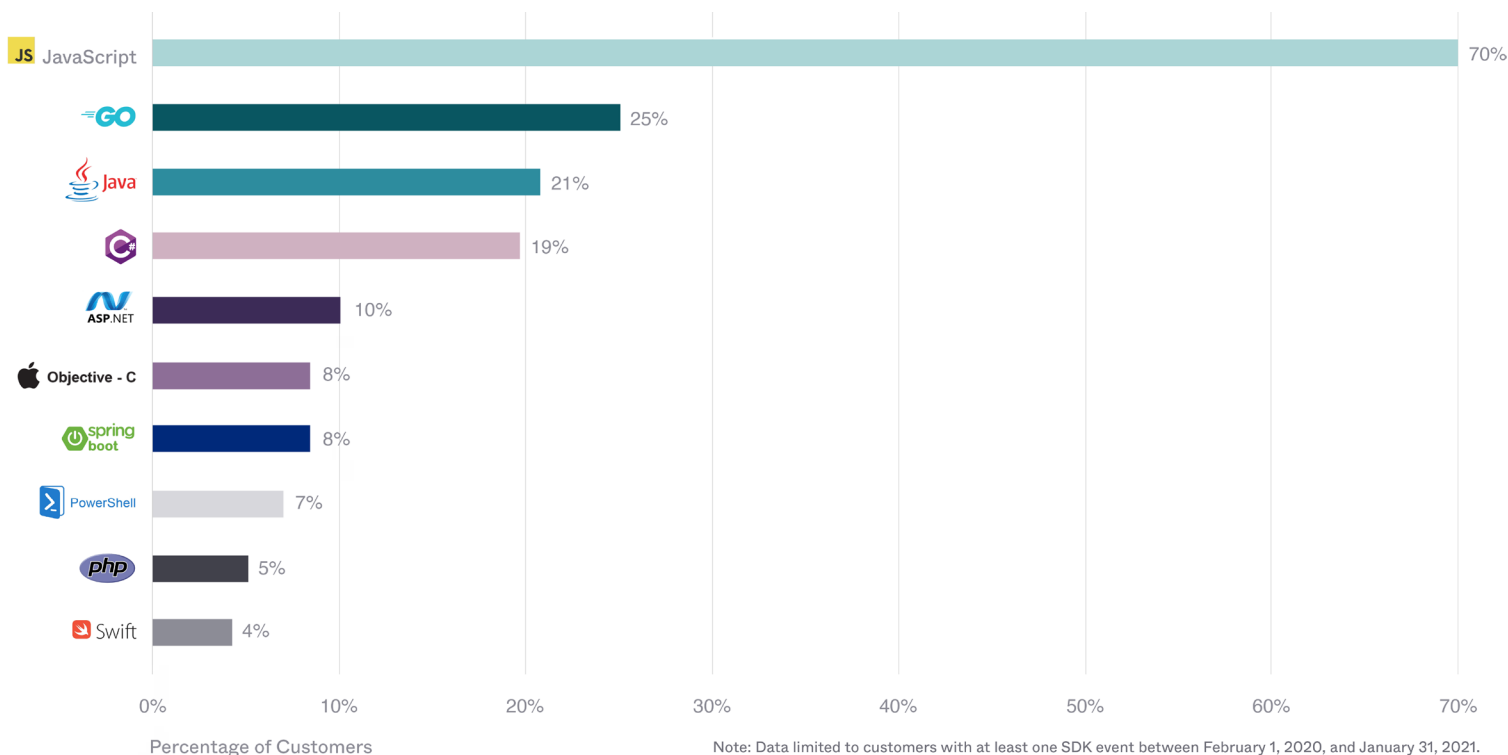
Okta's most popular SDK tools represent the tech stack developers are using to build applications. These tools are reflective of the broad set of environments and deeper integrations that Okta supports, and in this year's annual report, JavaScript moved to the top spot. Over 69% of customers using an SDK tool are now using JavaScript, a significant jump from the 24% we saw in 2019, and even a jump from the 63% we saw in 2020. Since 2019 we have seen the usage of Java, the enterprise king, slip from 27% to 21% in regards to SDK usage, mirroring an industry-wide trend shifting more development work to the front-end. Use of Go increased from 11% in 2019 to nearly 25% in January 2021; since this year's annual report, use of Go has surpassed use of Java to claim the #2 spot. And as expected, many organizations are using Windows and developing on C#.

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Use of Go has surpassed use of Java to claim the #2 spot.

## Customers Using SDK Tools



| SDK Tool | Percentage |
|---|---|
| JavaScript | 70% |
| Go | 25% |
| Java | 21% |
| C# | 19% |
| ASP.NET | 10% |
| Objective - C | 8% |
| spring boot | 8% |
| PowerShell | 7% |
| php | 5% |
| Swift | 4% |

Percentage of Customers

Note: Data limited to customers with at least one SDK event between February 1, 2020, and January 31, 2021.

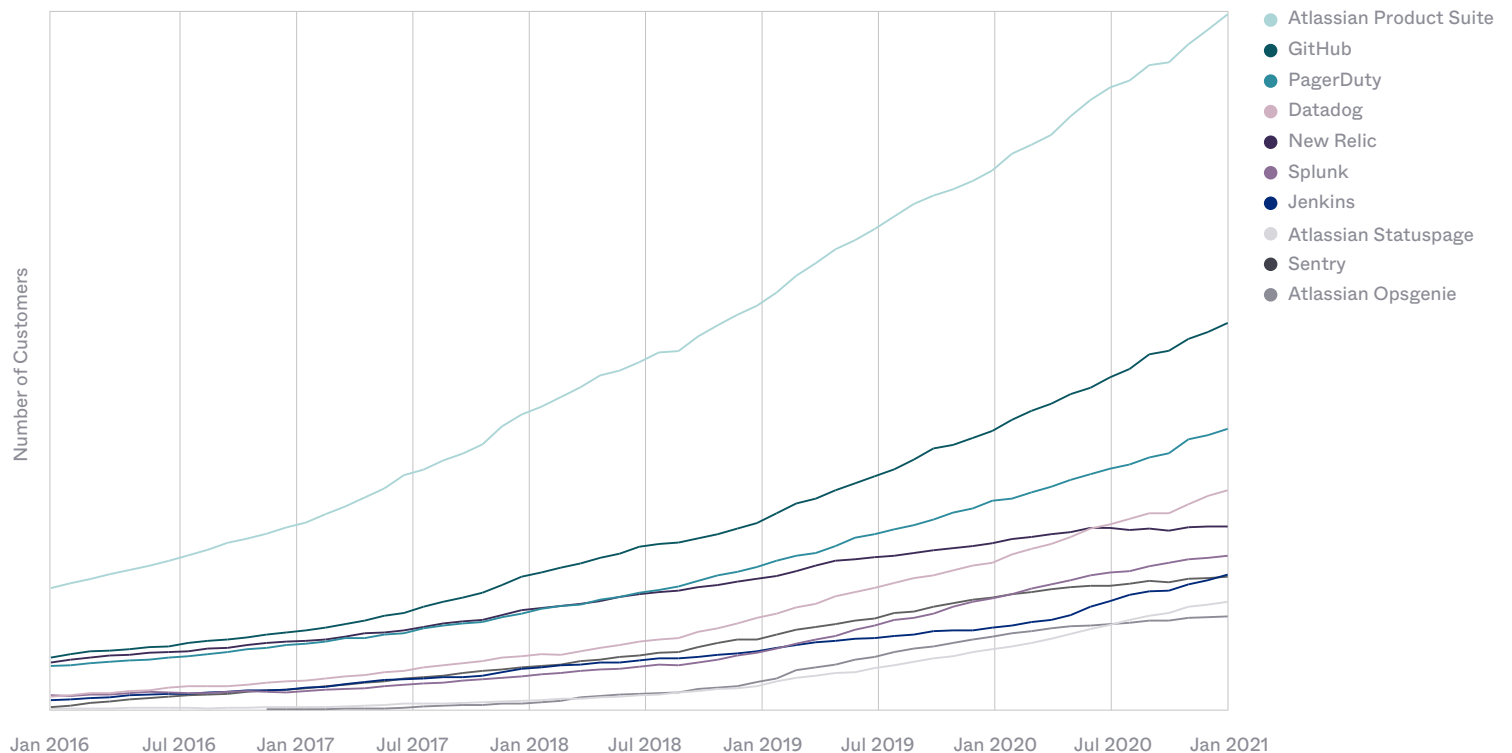**Developers expand their toolboxes to build the best user experiences**

Developers are expected to move quickly, and efficiently. And they need a deep toolbox to build the hottest apps.

Our top three developer tools have held their previous spots. The Atlassian Product Suite, whose rank as a developer tool includes customer deployments of Jira, Bitbucket, and Fisheye, continues to stand firmly in first place. Deployment of these tools in the Atlassian Product Suite has grown over 278% over the past four years. GitHub and PagerDuty have held tight in second and third place, respectively.

However, there is significant movement below the top three. Upstart Datadog, a monitoring, security and analytics platform,

pulled sharply ahead of Application Performance Monitoring (APM) tool New Relic in the past year to claim fourth place. We also see APM tool Splunk — our fourth fastest growing app in 2019, with 102% year-over-year growth — pull ahead of Atlassian's incident communication tool Statuspage to take sixth place. And deployment of the open source automation server Jenkins has grown 64% over the past year. Since this year's annual report, Jenkins has overtaken Statuspage to take seventh place. A notable recent addition to our top-ranking developer tools is Sentry, which is currently our tenth fastest growing app with 78% year-over-year growth.

## Most Popular Developer Tools



Legend:
- Atlassian Product Suite
- GitHub
- PagerDuty
- Datadog
- New Relic
- Splunk
- Jenkins
- Atlassian Statuspage
- Sentry
- Atlassian Opsgenie

Y-axis: Number of Customers

X-axis: Jan 2016, Jul 2016, Jan 2017, Jul 2017, Jan 2018, Jul 2018, Jan 2019, Jul 2019, Jan 2020, Jul 2020, Jan 2021

## Looking forward, moving ahead

Whether we think of the past twelve months as memorable, or as a year we would rather forget, we can all agree that this year has fundamentally changed how we work and how we live. As we experience the rise of the digital economy, companies are increasingly investing in the apps and tools needed to build the best customer experiences. And to support their workforces, organizations are reaching for tools that support the most important aspects of remote work, including collaboration, security, and employee engagement. In a world of shelter-in-place, we have relied on digital tools to bring us all back together.