



# The state of apps by Microsoft identity:

Azure AD app gallery apps that powered the way we work, learn and collaborate in 2020



2020 was an unprecedented year, to say the least. The COVID19 global pandemic drastically changed how we work, learn, and collaborate. Organizations had to find new ways to connect and maintain productivity while providing secure access to critical apps and resources. Our own Microsoft services, like Teams, served as the lifeline for remote and hybrid work and learning during the pandemic – growing rapidly from [44 million daily active users in March 2020](#) to [115 million daily active users this past October](#). But we know that businesses need many tools and apps to succeed, and [our commitment is to ensure that solutions work seamlessly and securely across platforms and extend to all clouds and apps](#).

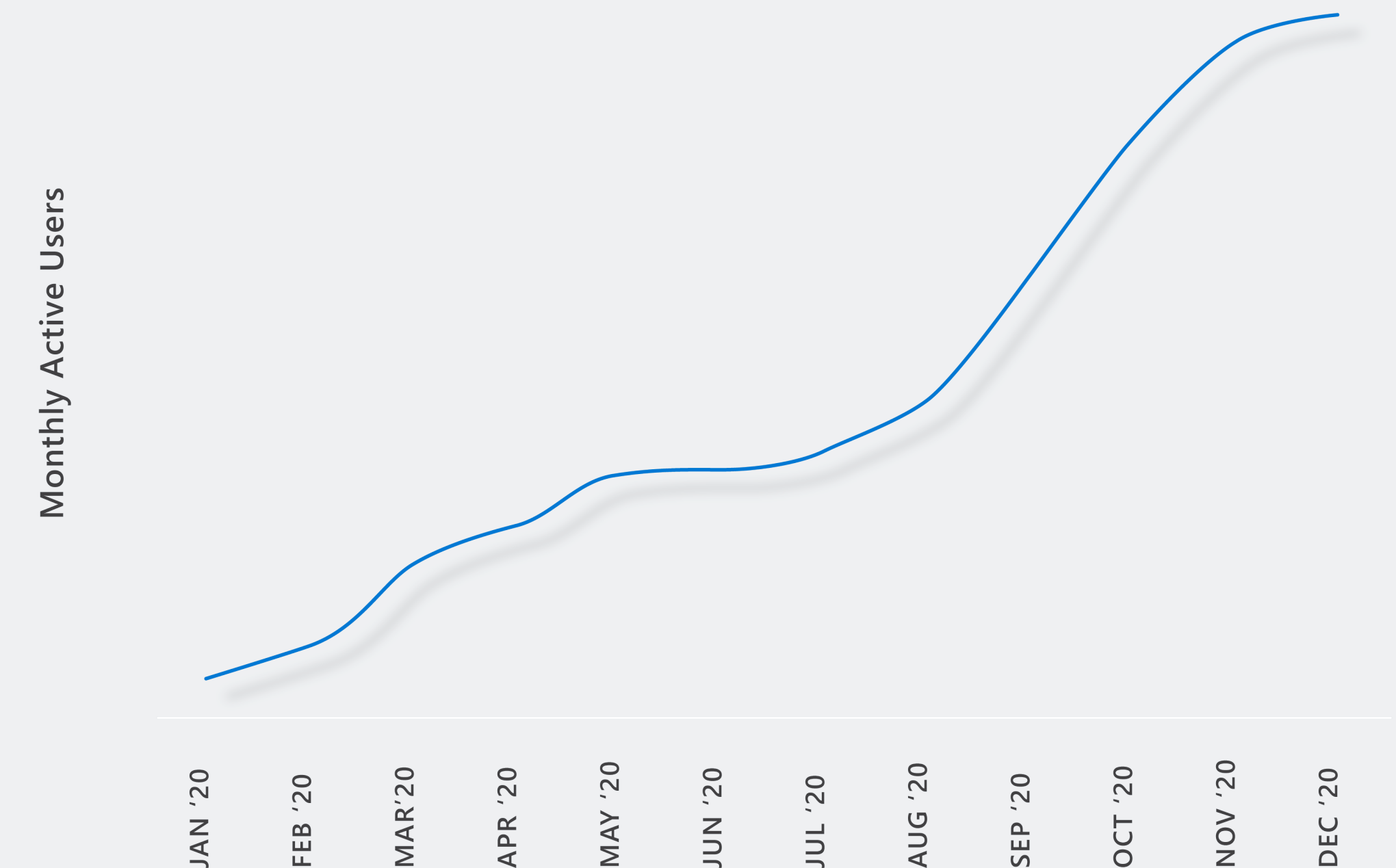
Recently, we analyzed enterprise cloud app usage and took a deeper look on how and what applications organizations are securing with Azure AD. In our analysis we looked at organizations' application usage within our [Azure AD app gallery](#), excluding Microsoft applications such as Azure, Dynamics, Office 365, and Teams. Our Azure AD app gallery enables organizations to quickly secure and manage apps of all types and includes thousands of pre-integrated apps. We're seeing customers of all sizes integrate all their apps with Azure AD to give their workforce a more convenient and secure experience. Read on for insights into how app usage shifted in 2020 compared to the years prior.



# The rise of security and collaboration apps to enable remote work

The challenges of 2020 forced leaders to rethink their priorities to ensure their teams can securely access apps from anywhere, anytime. The statistics reflect this. For example, the number of monthly active users of Azure AD app gallery apps has increased 109 percent year-over-year. And last year, when [Microsoft surveyed](#) 800 business leaders about their views of the pandemic threat landscape, they listed “Providing secure remote access to resources, apps, and data” as their #1 challenge.

## Azure AD App Gallery usage has grown 109% year-over-year



**Source:** Data sourced from applications available in the Azure AD app gallery, December 2020. Microsoft owned applications such as Office 365, Teams, Azure, Dynamics and other Microsoft apps have been excluded.





It's no surprise, then, that apps and services that help ensure secure, remote access to on-premises and cloud resources grew tremendously last year. Organizations have recognized that remote access to all apps including legacy, on-premises apps have become critically important in the new way of work. Security tools like Citrix ADC, Palo Alto Networks Prisma Access, and Zscaler Private Access, which help employees securely access any app regardless of location, have become business critical, making them some of the fastest growing applications in our app gallery this past year.

In addition to increasing investments in the security space, communication and collaboration apps have been instrumental to ensure business continuity. We recognize that securing any app is a team effort, so we work closely with app providers of all types to integrate with Azure AD, even Microsoft competitors. Apps like Cisco Webex, Google Cloud / Google Workspace, Workplace from Facebook, and Zoom are some of the top apps Azure AD secures to help organizations maintain productivity while helping people feel more connected.

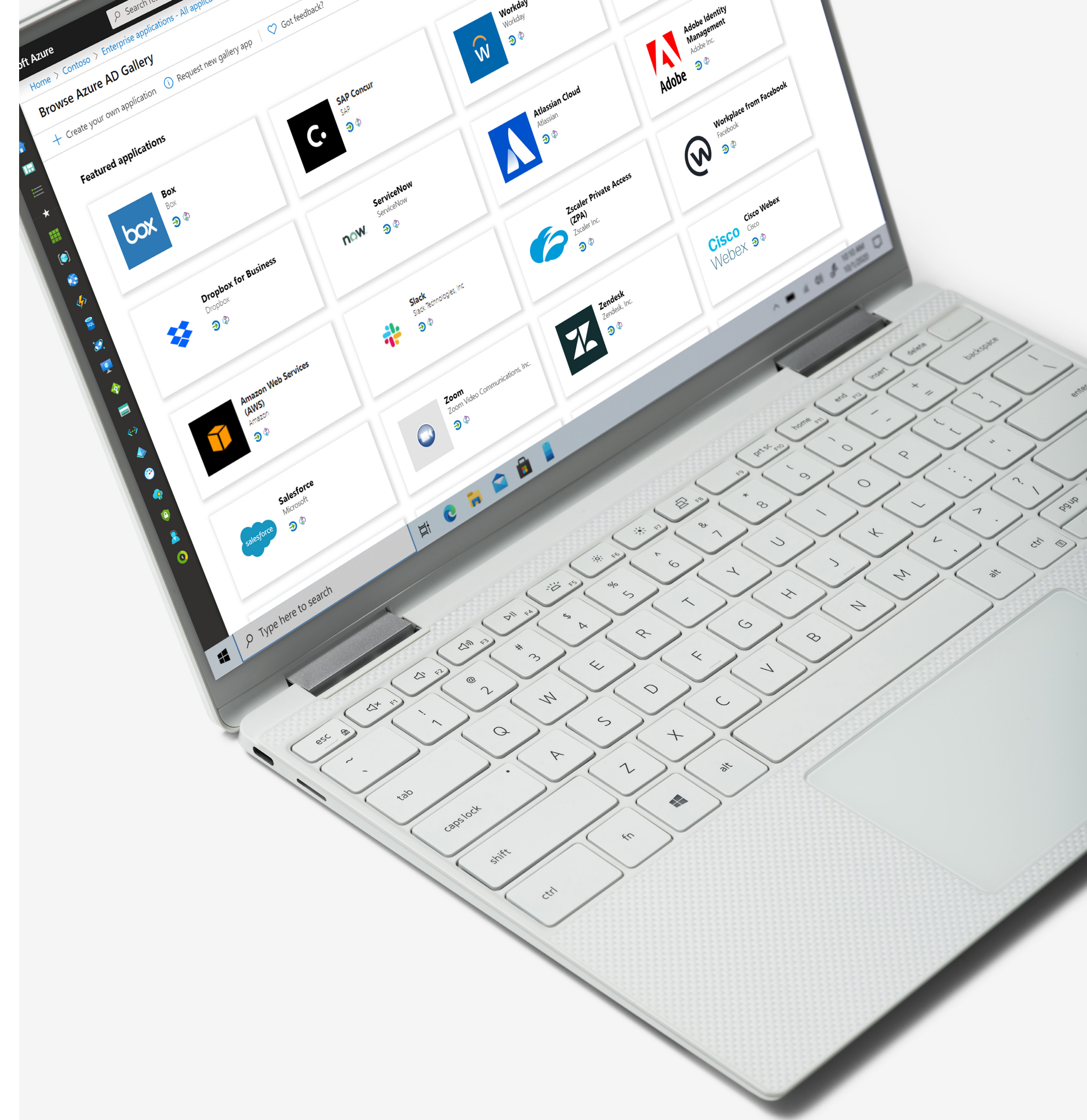
We've also continued to see a few apps consistently in our most popular apps list. Human Resource apps like SAP SuccessFactors and Workday and IT Service Management apps like ServiceNow continued to see widespread usage among our customers in 2020.



# The top apps of 2020

The global pandemic clearly had an impact on which apps were used the most. Companies shifting to remote work improved productivity with apps that strengthened communication, collaboration, and security.

For the first time, security apps like Palo Alto Networks Prisma Access and Zscaler Private Access made their way to the top 15 apps by monthly active users. Other newcomers to the top 15 apps list include collaboration and communication apps Workplace from Facebook and Zoom. Zoom not only made its 2020 debut within the top 15 on this list, it catapulted to #5.





## Top 15 apps by monthly active users

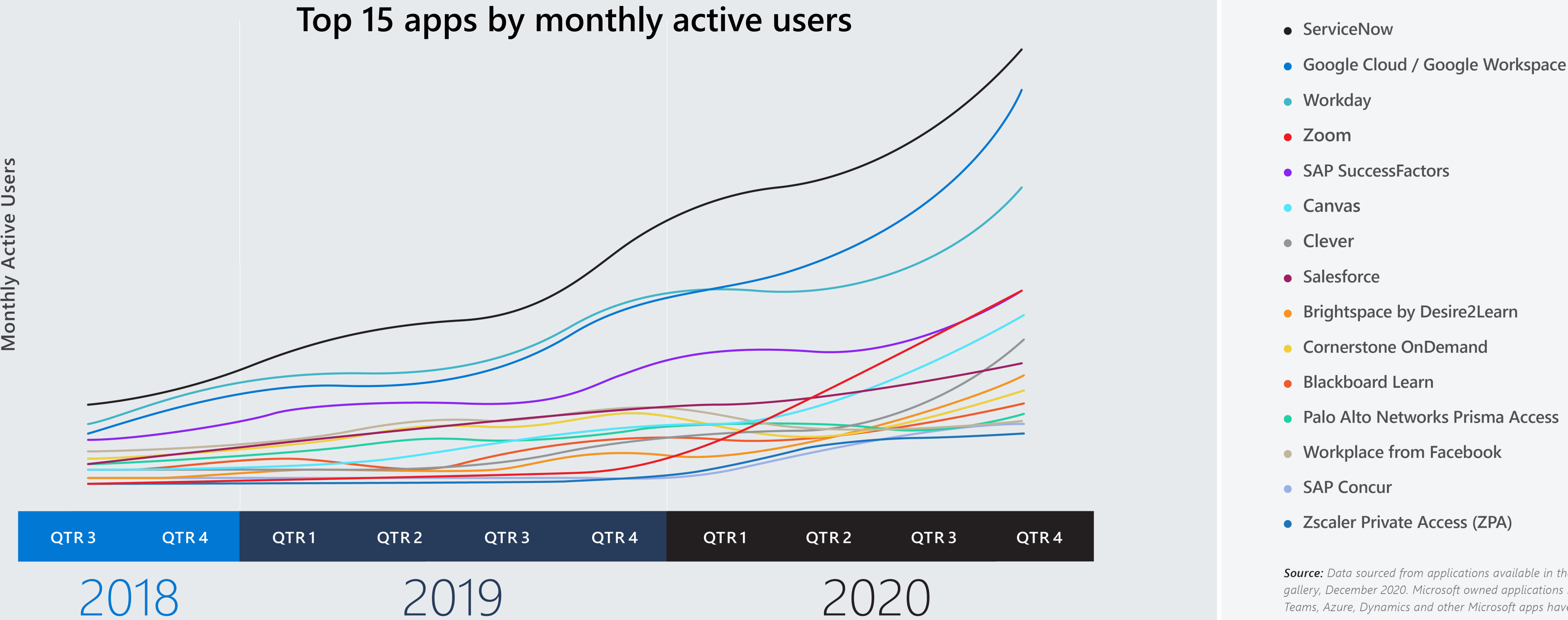
Rank	2020	2019	2018
1	ServiceNow	ServiceNow	ServiceNow
2	Google Cloud / Google Workspace	Workday	Workday
3	Workday	Google Cloud / Google Workspace	Google Cloud / Google Workspace
4	SAP SuccessFactors	SAP SuccessFactors	SAP SuccessFactors
5	Zoom	Salesforce	SAP Concur
6	Canvas	SAP Concur	Salesforce
7	Clever	Clever	Canvas
8	Salesforce	Canvas	Clever
9	Brightspace by Desire2Learn	Blackboard Learn	Blackboard Learn
10	Cornerstone OnDemand	Cornerstone OnDemand	Cornerstone OnDemand
11	Blackboard Learn	Box	Box
12	Palo Alto Networks Prisma Access	Brightspace by Desire2Learn	SAP NetWeaver
13	Workplace from Facebook	SAP NetWeaver	Cisco Webex Meetings
14	SAP Concur	Cisco Webex Meetings	Brightspace by Desire2Learn
15	Zscaler Private Access (ZPA)	UltiPro	UltiPro

**Source:** Data sourced from applications available in the Azure AD app gallery, December 2020. Microsoft owned applications such as Office 365, Teams, Azure, Dynamics and other Microsoft apps have been excluded.



ServiceNow continues to lead in monthly active users for the third year in a row. Google Cloud / Google Workspace, SAP SuccessFactors, and Workday have maintained their leading ranks through the years, as organizations of all sizes need HR, IT Service Management, and general productivity applications.

From Q1 2020 to Q2 2020, as the global pandemic hit, many of these top apps accelerated in usage to help provide secure remote access for users and to help manage their digital workflows.



## Top 15 apps by number of organizations

We also noticed some subtle differences when comparing the most popular apps by monthly active users with the most popular apps by number of organizations. Popularity by number of organizations looks at the apps most used among our customers. With organizations relying more heavily on video conferencing, Zoom made the jump from #10 in 2018 to #1 in 2020, pushing list leaders like Google Cloud / Google Workspace and Salesforce from the top two spots.

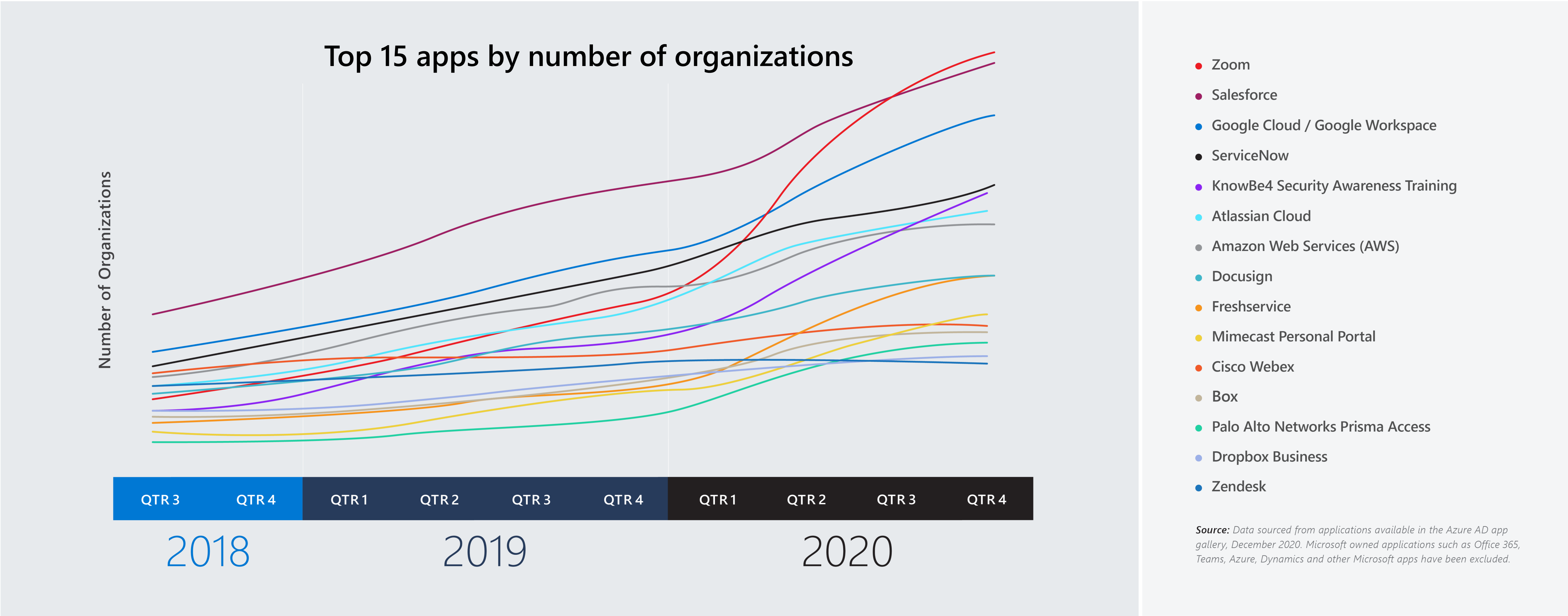
In addition to Zoom, KnowBe4 Security Awareness made its way to the top 5 apps in 2020. It rose from #12 in 2018 to #8 in 2019, increasing steadily in usage from the beginning of Q2 2020 to the end of the year, stressing the importance of security training and awareness within the workforce.

Rank	2020	2019	2018
1	Zoom	Salesforce	Salesforce
2	Salesforce	Google Cloud / Google Workspace	Google Cloud / Google Workspace
3	Google Cloud / Google Workspace	ServiceNow	ServiceNow
4	ServiceNow	Adobe Creative Cloud	Amazon Web Services (AWS)
5	KnowBe4 Security Awareness Training	Amazon Web Services (AWS)	Atlassian Cloud
6	Atlassian Cloud	Zoom	Adobe Creative Cloud
7	Amazon Web Services (AWS)	Atlassian Cloud	Dropbox Business
8	Docusign	KnowBe4 Security Awareness Training	Box
9	Freshservice	Freshservice	Freshservice
10	Mimecast Personal Portal	Box	Zoom
11	Cisco Webex	Dropbox Business	SAP Concur
12	Palo Alto Networks Prisma Access	SAP Concur	KnowBe4 Security Awareness Training
13	Box	Slack	Citrix ShareFile
14	Dropbox Business	Zendesk	Slack
15	Zendesk	Citrix ShareFile	Zendesk



Cisco Webex, DocuSign, Mimecast Personal Portal, and Palo Alto Networks Prisma Access made their first appearance on this list in 2020, reinforcing the shifts we've seen throughout our analysis.

Unlike the security and collaboration apps that topped the list, apps like SAP Concur, a travel and expense management service, dropped off the top 15 list. Due to travel restrictions, those use to traveling regularly for work have swapped out face-to-face meetings for virtual calls from home.



# The most popular apps by organization size

When we analyzed the most popular apps used based on organization size, we found several apps commonly deployed in organizations of all sizes: Google Cloud / Google Workspace, Salesforce, and Zoom.

In contrast, deployment of HR and IT service management apps, necessary to ensure business continuity during the pandemic, differ based on the organization size. These apps have not only helped enable remote onboarding and offboarding, they've also helped IT teams fulfill employee requests for applications, devices, or services.

While enterprise and mid-market organizations use HR apps such as SAP SuccessFactors and Workday, small businesses commonly use BambooHR. And HR apps like UltiPro and Cornerstone OnDemand are used more by mid-market businesses.

Enterprise and mid-market organizations regularly deploy the IT service management app ServiceNow, while small businesses predominantly use Freshservice.

Enterprise (5000+ monthly active users)	Mid-market (250-4,999 monthly active users)	Small Business (<250 monthly active users)
ServiceNow	Google Cloud / Google Workspace	Google Cloud / Google Workspace
Google Cloud / Google Workspace	ServiceNow	Zoom
Workday	Workday	Salesforce
SAP SuccessFactors	Zoom	Atlassian Cloud
Zoom	Salesforce	BambooHR
Cornerstone OnDemand	SAP SuccessFactors	KnowBe4 Security Awareness Training
Salesforce	UltiPro	Box
Workplace from Facebook	Palo Alto Networks Prisma Access	Freshservice
SAP Concur	KnowBe4 Security Awareness Training	Palo Alto Networks Prisma Access
Zscaler Private Access (ZPA)	Cornerstone OnDemand	Zendesk



# The most popular apps by industry

The same broad trends and app usage apply to the most popular apps by industry. Apps like Google Cloud / Google Workspace, Salesforce, ServiceNow, Workday, and Zoom are popular across all industries. Security, collaboration, and workflow management were priorities this past year despite the differences between each industry.

One industry, education, had a distinct set of popular apps, with apps like Brightspace, Canvas, and Clever ranking in the top five. These learning management systems helped schools and institutions adapt to remote learning and became central hubs for digital instruction this past year.

For shift-based industries that rely on [frontline workers](#), like Retail and Healthcare, Kronos is a popular app to help with workforce management activities like employee scheduling.





## The most popular apps by industry

Travel	Telecom	Retail	Professional Services
ServiceNow	Workplace from Facebook	Workday	ServiceNow
Cornerstone OnDemand	SAP SuccessFactors	SAP SuccessFactors	Workday
Workday	ServiceNow	ServiceNow	Salesforce
SAP SuccessFactors	Workday	Kronos	Zscaler Private Access (ZPA)
Dynamic Signal	Slack	Workplace from Facebook	Zoom
Manufacturing	Healthcare	Government	Financial Services
ServiceNow	ServiceNow	ServiceNow	ServiceNow
Workday	Workday	SAP SuccessFactors	Workday
SAP SuccessFactors	Kronos	Zoom	Salesforce
Salesforce	SAP SuccessFactors	Google Cloud / Google Workspace	SAP SuccessFactors
SAP Concur	Google Cloud / Google Workspace	Workday	Zoom
Education	Consumer Goods	Automotive	Energy
Google Cloud / Google Workspace	ServiceNow	ServiceNow	ServiceNow
Canvas	SAP SuccessFactors	Workday	SAP SuccessFactors
Clever	Workday	Cisco Webex	Workday
Zoom	Workplace from Facebook	Cornerstone OnDemand	Palo Alto Networks Prisma Access
Brightspace by Desire2Learn	SAP Cloud Platform Identity Authentication	SAP SuccessFactors	Zscaler Private Access (ZPA)



# The most popular apps by category

This year, we also analyzed the most popular apps across app categories based on monthly active users. We looked at the top 5 apps across 10 app categories, ranging from education apps to security apps to IT service management apps, as summarized in the table:

Education	Human Resources	Security	IT Service Management	Data Services
Canvas	Workday	Palo Alto Networks Prisma Access	ServiceNow	Tableau
Clever	SAP SuccessFactors	Zscaler Private Access (ZPA)	Freshservice	Domo
Blackboard Learn	Cornerstone OnDemand	KnowBe4 Security Awareness Training	TOPdesk	SAP Analytics Cloud
Brightspace by Desire2Learn	UltiPro	Cisco AnyConnect	Dialpad	Splunk Enterprise and Splunk Cloud
Apple School Manager	Kronos	Citrix ADC	Ivanti Service Manager (ISM)	Snowflake
Travel and Expenses	CRM	Communication and Collaboration	Content Management	Project Management
SAP Concur	Salesforce	Google Cloud / Google Workspace	Box	Smartsheet
Coupa	Zendesk	Zoom	Templafy OpenID Connect	Atlassian Cloud
Expensify	FreshDesk	Cisco Webex	Docusign	Workfront
Certify	HappyFox	Workplace from Facebook	Citrix ShareFile	Miro (formerly RealtimeBoard)
GetThere	UserVoice	Slack	Dropbox Business	MindMeister





## 2020's Fastest Growing Apps



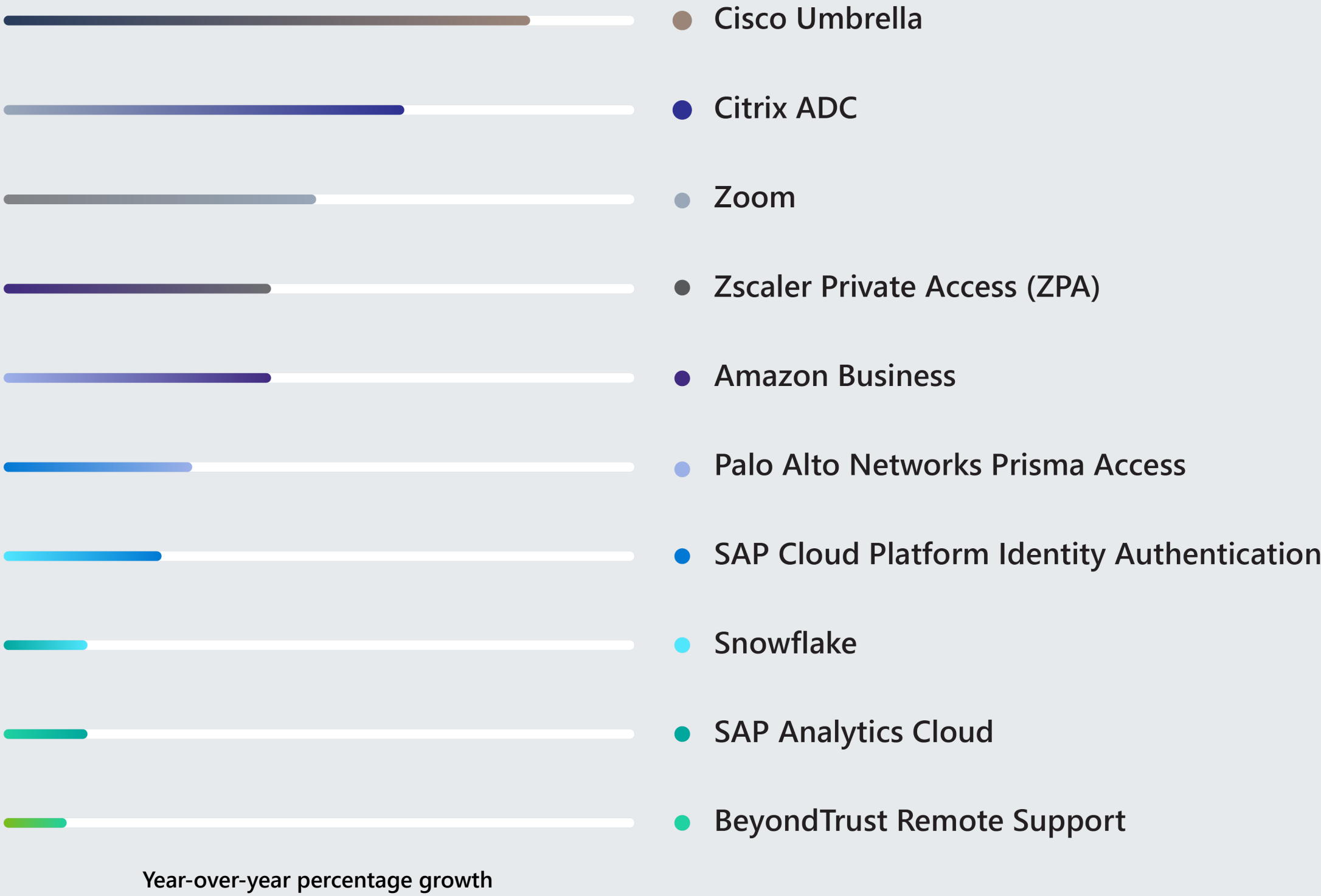
Apps that help employees with secure remote work are not only some of the most popular, but also among the fastest-growing. Half of the top 10 fastest growing apps in 2020 were security-focused. Apps from our [secure hybrid access](#) partnerships - Citrix ADC, Palo Alto Networks Prisma Access, and Zscaler Private Access - which enable customers to access legacy and on-premises apps, have also grown quickly. Other security apps include Cisco Umbrella, the fastest growing app this past year, and BeyondTrust Remote Support.

Zoom saw extraordinary growth in 2020 as it rose to become the most popular app used in organizations. Its place as the third fastest-growing app this past year is particularly impressive given it was already popular and widely used. Data management and analytics solutions grew quickly this year too. Snowflake and SAP Analytics Cloud became the 8th and 9th fastest growing apps, respectively.

This past year also saw Amazon Business become one of the fastest-growing apps. Amazon Business is a marketplace that simplifies the purchasing process and helps get products into the hands of organizations. The pandemic accelerated online shopping for consumers and it's no different for businesses. Businesses have shifted their purchasing and procurement to online with Amazon Business becoming the 5th fastest growing app in 2020.

# Top 10 fastest growing apps by monthly active users

(Must have a minimum of 100 customers in 2019)





# Secure Digital Transformation

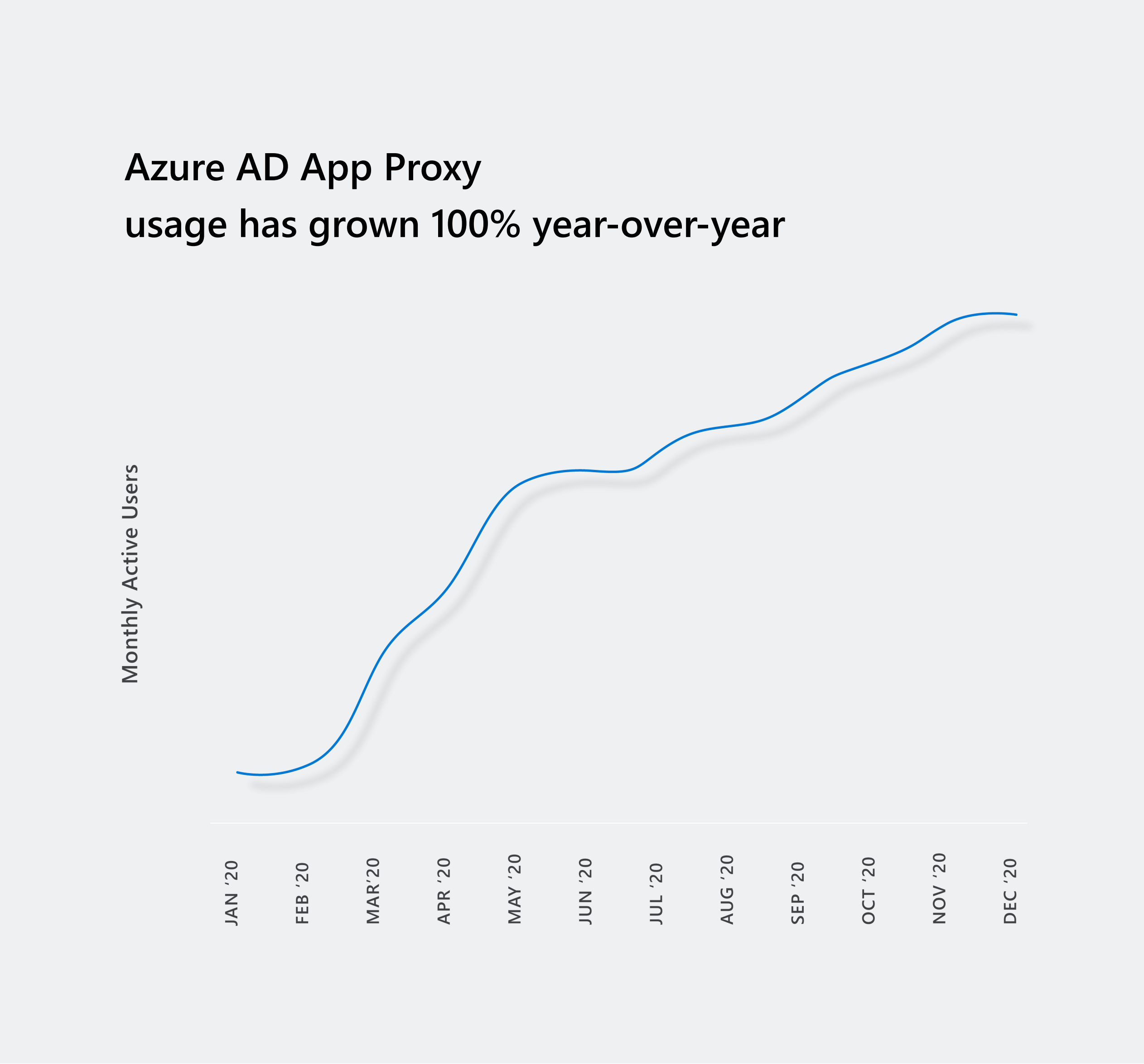
Whether we look at the most popular apps by monthly active users, number of organizations, industries, or customer type, or we look at the fastest growing apps of 2020, investment in security is an undeniable trend. The pandemic has both accelerated digital transformation timelines and increased the need for advanced security that organizations can rely on to provide secure access to their users wherever they may be working.

We've seen more users turn on security capabilities like multi-factor authentication (MFA) —the number of monthly active users utilizing MFA with Azure AD has grown 150% year-over-year. [Passwordless technology also experienced a breakthrough year](#). Passwordless usage in Azure AD went up by more than 50% for Windows Hello for Business, passwordless phone sign-in with Microsoft Authenticator, and FIDO2 security keys.





Our Azure AD App Proxy service, which helps organizations with remote access to critical on-premises apps, also experienced huge growth this past year. From February to March, the number of monthly active users spiked by roughly 60 percent as the global pandemic started to take hold. Since then, the number of monthly active users has continued to rise, increasing by roughly 100% between December 2019 and December 2020. Thanks to Azure AD App Proxy, organizations have been able to quickly provide secure, remote access to mission-critical apps that reside on-premises or use legacy authentication protocols like HTTP or header-based.





# That's A Wrap on 2020

Users, organizations, and industries alike are investing in improving security and collaboration. Cloud-based apps that provide secure access and reliable communication have become a vital part of organizations' day-to-day operations.

App adoption is growing, and the changing digital landscape has changed the way people work. From security apps like Palo Alto Networks Prisma Access to education apps like Blackboard Learn and communication apps like Zoom or Teams, people are relying more heavily on cloud apps to get their work done. We expect these trends to continue past 2020 as security remains a top priority and remote work continues to require advanced communication and collaboration capabilities. In the wake of 2020, companies will continue to evaluate the cultural and business impact of the shift to remote work and to try to understand where that shift will take them in 2021.

Connecting all of your apps to Azure AD can help safeguard and streamline access while simplifying management and reducing costs. In fact, [Forrester estimates that customers can gain a 123% return on investment](#) by secure all apps with Azure AD. To learn how to help your employees working from home remain productive, visit our [secure remote work resources](#) or read the [Top 5 ways Azure AD can help you enable remote work](#). We hope you've enjoyed this year's app trends data report and we look forward to seeing you next year!

## Methodology

Microsoft takes privacy seriously. We remove all personal data and organization-identifying data, such as company name, from the data before using it to produce reports. We never use customer content such as information within an email, chat, document, or meeting to produce reports. Application usage and trend data in this report were analyzed based on applications available in the Azure AD app gallery. We excluded Microsoft owned applications from the data such as Office 365, Teams, Azure, Dynamics, LinkedIn, GitHub, and other Microsoft applications from this report. The report includes data from December 31st, 2018 – December 31st, 2020.







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