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THE SALESFORCE ECONOMIC IMPACT:

9 Million New Jobs by 2026, $1.6 Trillion of New Revenues for Customers

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Preface

For a decade now, IDC has been quantifying the economic impact of cloud computing in terms of the revenues it creates for companies and the jobs generated by those revenues. This White Paper is the fifth major study conducted for Salesforce during that time.

IDC's methodology takes economic inputs from government sources and IDC's IT and cloud market forecasts to feed a model that uses assumptions about the amount of IT and business innovation cloud computing engenders, the available IT resources that can be freed up, and the penetration of IT itself in the economy. It also relies on surveys, in this case a survey of 525 enterprises across eight countries on cloud deployment and the benefits and challenges of cloud computing.[1]

It's a well-tested process, and one conducted many times. Update inputs, validate assumptions, turn the crank.

But then came COVID-19.

In roughly a six-month period beginning in March 2020, IDC began conducting biweekly surveys and making monthly adjustments to its major market forecasts in response to rapidly changing market conditions. Forecasts are *still* evolving, though not quite so dramatically.

The good news is that this White Paper has the advantage of all this re-forecasting, with fresh inputs taking forecasts out to 2026. The bad news is that no useful comparison can be made between this and earlier studies. The market has taken too many turns.

But, onward. This year's study has much to tell.

[1]See the Methodology section for a description. Two hundred sixty-four of the respondents reported that Salesforce was their primary cloud services supplier.

Executive Summary

→ The growth of cloud software[2] suffered little from the pandemic, growing 22% worldwide in 2020, while on-premises software growth fell to zero. This year, cloud-delivered software will be 43% of the software market, and by 2026, it will be 61%.

→ Cloud computing will be a major component of enterprise digital transformation efforts. IDC forecasts that cloud-related technologies will account for 27% of digital transformation IT spending this year, growing to 37% in 2026. Of 74% of survey respondents who said their organizations had a formal digital transformation strategy, 51% rated cloud computing "very important" to that strategy.

→ IDC forecasts that the use of cloud services of Salesforce and its ecosystem will create new revenues for customers that will add up to $1.56 trillion worldwide by 2026. This revenue will lead to the creation of 9.3 million new jobs, including 3.8 million direct jobs and 5.5 million indirect/induced jobs.

→ IDC forecasts that nearly two-thirds of those direct jobs will require occupational skills and that the need for specific digital skills will grow from 23% of those new jobs this year to 37% in 2026.

→ The ecosystem of companies supporting Salesforce customers' implementations is five times as big as Salesforce itself today and will be more than six times as big in 2026. With 2026 ecosystem revenue forecast to be 3.5 times that in 2020, the challenge will be finding talent.

→ Salesforce customers surveyed reported that their organization's investments in cloud computing were allocated as follows: 30% for customer-facing activities, 25% on operations, 23% toward productivity improvements, and 22% to support innovation and product development.

→ When surveyed, Salesforce customers said the top two benefits of the company's cloud services were support for a more rural/suburban workforce (47%) and adding to brand value (42%) (refer to **Figure 7**).

→ Cloud computing, with its reliance on efficient hyperscale datacenters, can also help organizations reduce carbon emissions (see How Cloud Computing Cuts CO_2 Emissions sidebar). In fact, as shown in **Figure 7**, 39% of Salesforce customers surveyed rated the use of Salesforce cloud services as a top benefit in supporting their sustainability efforts.

[2] Excludes IaaS

Cloud Computing to the Rescue

Behind the economic engine of Salesforce — and its ecosystem of partners — is the economic engine of cloud computing itself.

IDC's underlying premise is that by freeing up IT resources, cloud computing enables IT and business innovation. And while external IT spending typically only accounts for 2–5% of a company's expenses, its footprint easily extends to 50–90% of a company's operations. A small change in the IT department can have a big impact.

Figure 1 shows the relentless growth of cloud as the new paradigm for the distribution of software.

FIGURE 1

Software Moves to the Cloud

(worldwide versus on-premises software revenues ($B))
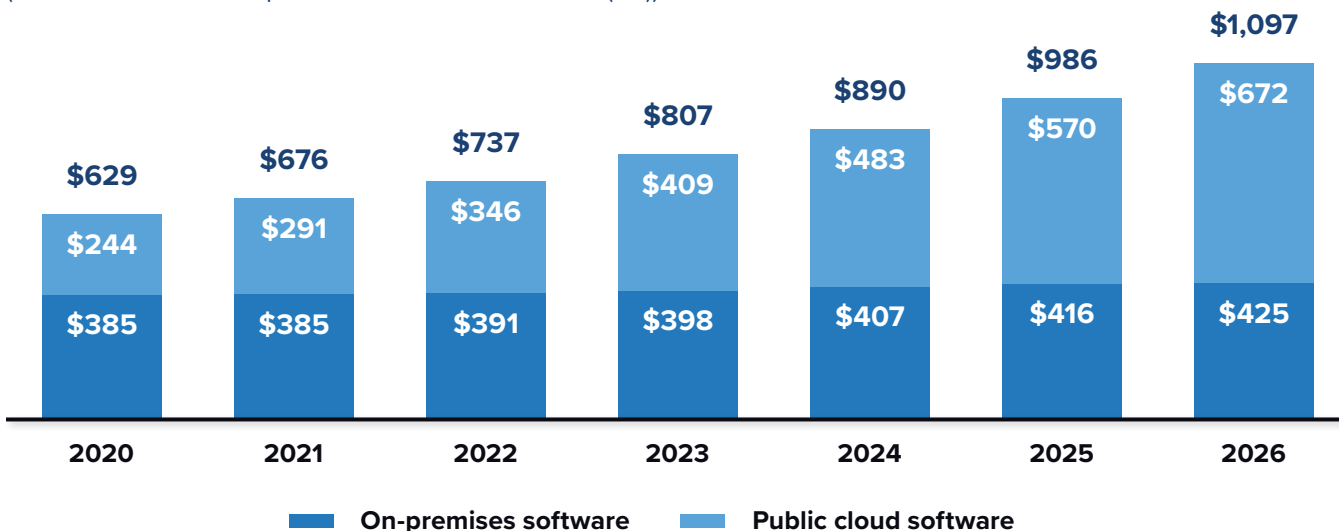
Source: IDC, 2021

As shown in **Figure 1**, while on-premises software will grow at 2% a year over the next five years, cloud software will grow at 18%.

Not shown is how growth of the two components changed in 2020 as a result of COVID-19. In 2019, on-premises software grew 5% and in 2020, 0%. Meanwhile, cloud software grew 25% in 2019 and 22% in 2020.

One of the reasons cloud computing has such blistering growth is its importance to digital transformation — the process of transforming ad hoc IT implementations into comprehensive all-digital approaches for every facet of the business.

Figure 2 shows the rapid growth of cloud software in support of digital transformation and the reason IDC calls cloud computing a "pillar" of what IDC calls the "3rd Platform."[3]

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[3] The 1st Platform was mainframe computing, and the 2nd Platform was distributed computing with PC and networking.

FIGURE 2

Cloud Drives Digital Transformation

(worldwide digital transformation software spending ($B))

Noncloud software   Cloud software
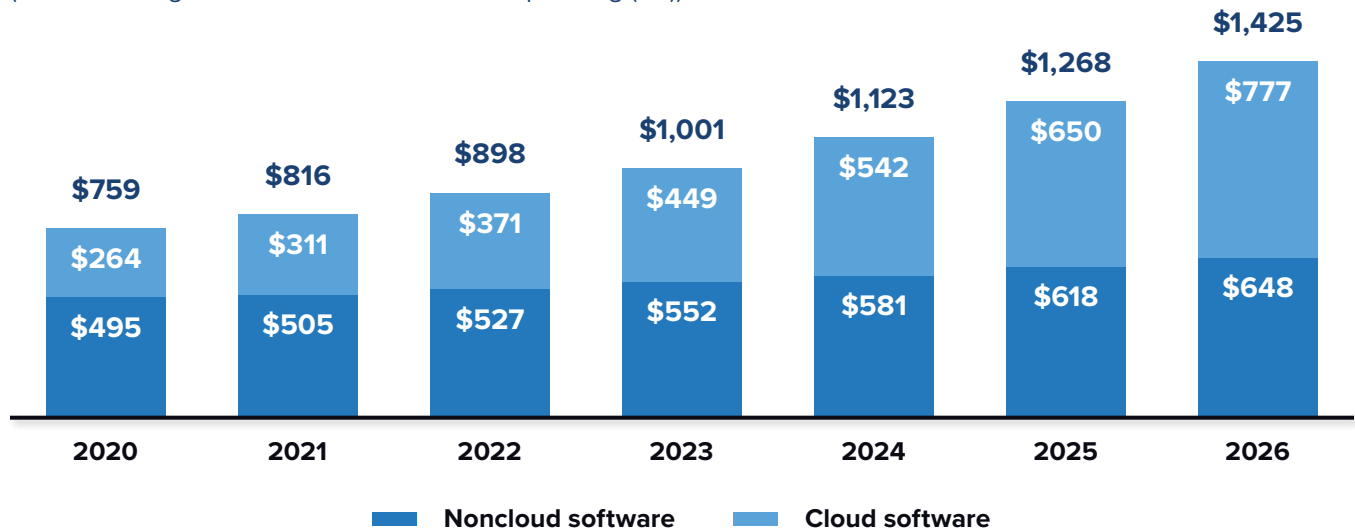
Source: IDC, 2021

Some of the specific ways cloud computing supports digital transformation in a time of uncertainty were laid out in a study conducted for Salesforce in July 2020.[4] Here, IDC learned of many ways cloud computing helped Salesforce customers adjust to uncertainty, from enabling remote work and remote contact with customers to developing new products in weeks, not months.

In the survey for this study, 74% of respondents said they had a formal digital transformation strategy and 51% said cloud computing was "very important" to that plan.

The Benefits of Salesforce Cloud to the Economy

Taking the overall economic benefits of cloud computing and winnowing them down to those tied to Salesforce and its ecosystem yields an impressive picture. IDC predicts that the use of Salesforce and its ecosystem's cloud services will generate $308 billion in the customer base this year and more than double that in 2026 at $724 billion.

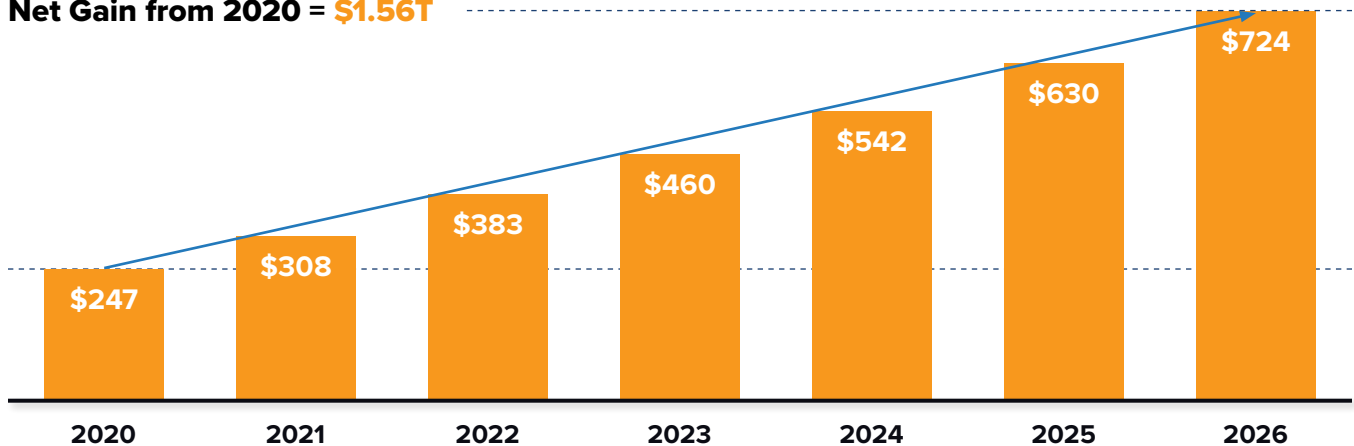**Figure 3** shows the yearly progression.

How Salesforce Fuels the Economy

(worldwide business revenues generated from the use of Salesforce Cloud ($B))

Net Gain from 2020 = $1.56T

2020	2021	2022	2023	2024	2025	2026
$247	$308	$383	$460	$542	$630	$724

Source: IDC, 2021
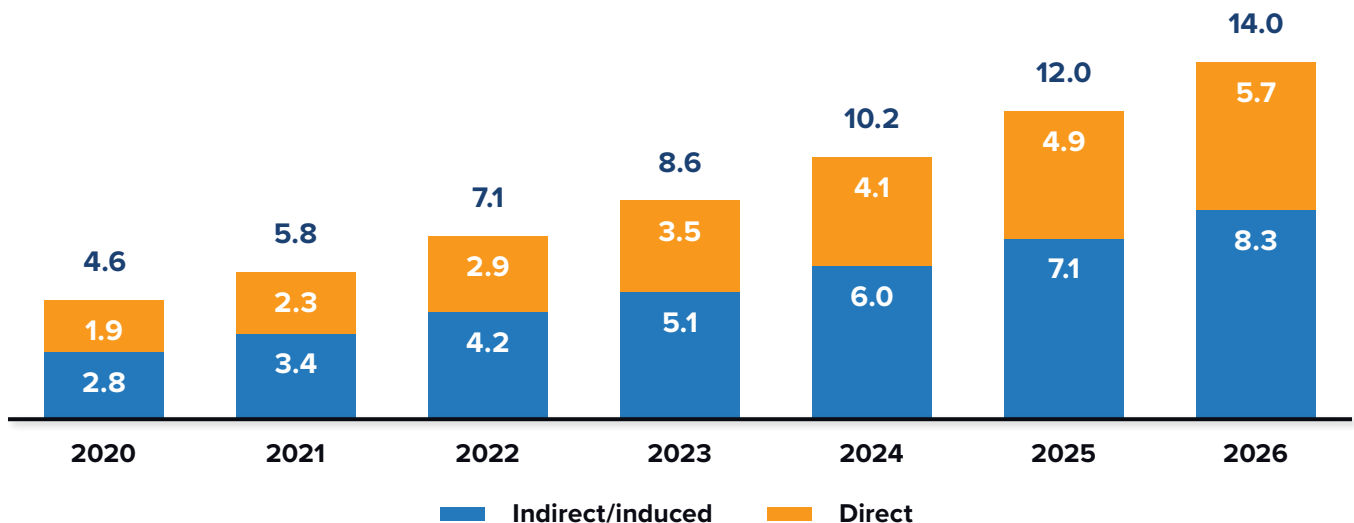
If one considers only the *new* revenues created since last year (2020), the aggregate above that level comes to $1.56 trillion.

The commensurate job creation driven by those revenues is shown in **Figure 4**. Here, the aggregate number of new cloud-generated jobs is 9.3 million.

How Salesforce Drives Job Growth

(# of worldwide jobs generated from the use of Salesforce Cloud (M))

	2020	2021	2022	2023	2024	2025	2026
Total	4.6	5.8	7.1	8.6	10.2	12.0	14.0
Direct	1.9	2.3	2.9	3.5	4.1	4.9	5.7
Indirect/induced	2.8	3.4	4.2	5.1	6.0	7.1	8.3

Indirect/induced ▮ Direct ▮

Note: Total shown may not match the sum of components shown because of rounding
Source: IDC, 2021

Note that there are two classes of jobs:

→ "Direct" jobs are those created in the Salesforce customer base from the revenues generated by the use of Salesforce and its ecosystem's cloud services.

→ "Indirect/induced" jobs are those created in the economy by people filling the direct jobs (induced) and by spending on local goods and services by Salesforce and its ecosystem (indirect).

The Benefits of Salesforce Cloud to Customers

Figures **3** and **4** depict general economic impact, but what about benefits to individual companies? What did the survey show?
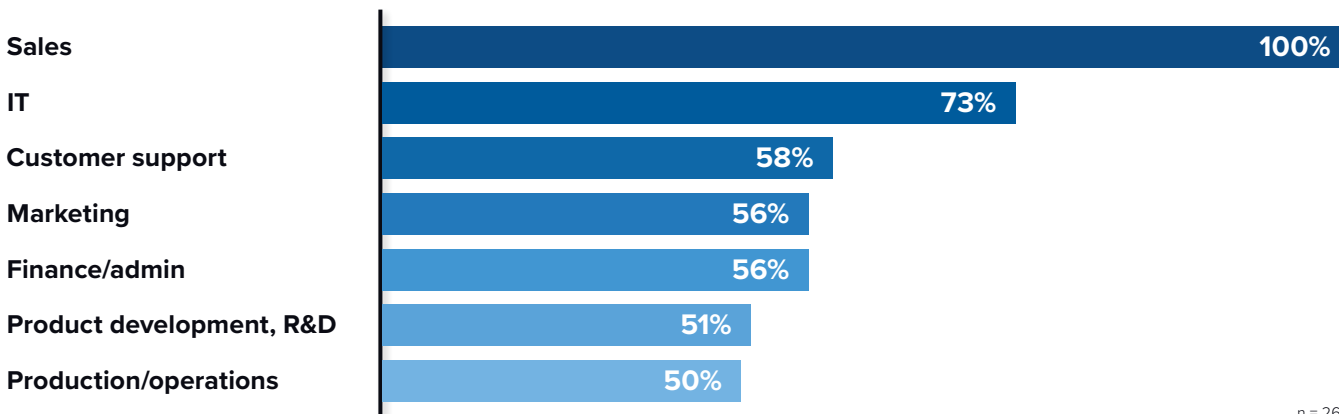
For one, **Figure 5** shows how well distributed Salesforce is within its customer base, with the average Salesforce customer using Salesforce solutions in more than four departments.

FIGURE 5

The Salesforce Reach

(% using Salesforce Cloud solutions by department)

Number of departments per respondents = 4.4

Department	%
Sales	100%
IT	73%
Customer support	58%
Marketing	56%
Finance/admin	56%
Product development, R&D	51%
Production/operations	50%

n = 264
Source: IDC Survey, August 2021

Salesforce customers further classified their implementations as 30% customer facing, 25% targeted at operational improvement, 23% at improving employee productivity, and 22% at research and development (R&D) and product development.

Those customers also allocated benefits, as shown in **Figure 6**, along with the expected improvement — in other words, what percentage expected what type of benefit, and then by what percentage they expected the use of Salesforce cloud to improve the activities driving those benefits.

FIGURE 6

How Salesforce Customers Benefit

(% of expected benefits)   (% of expected improvement)
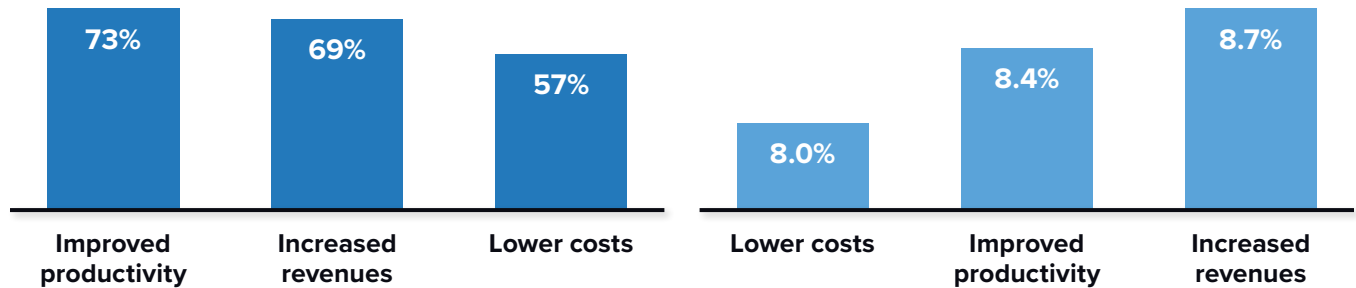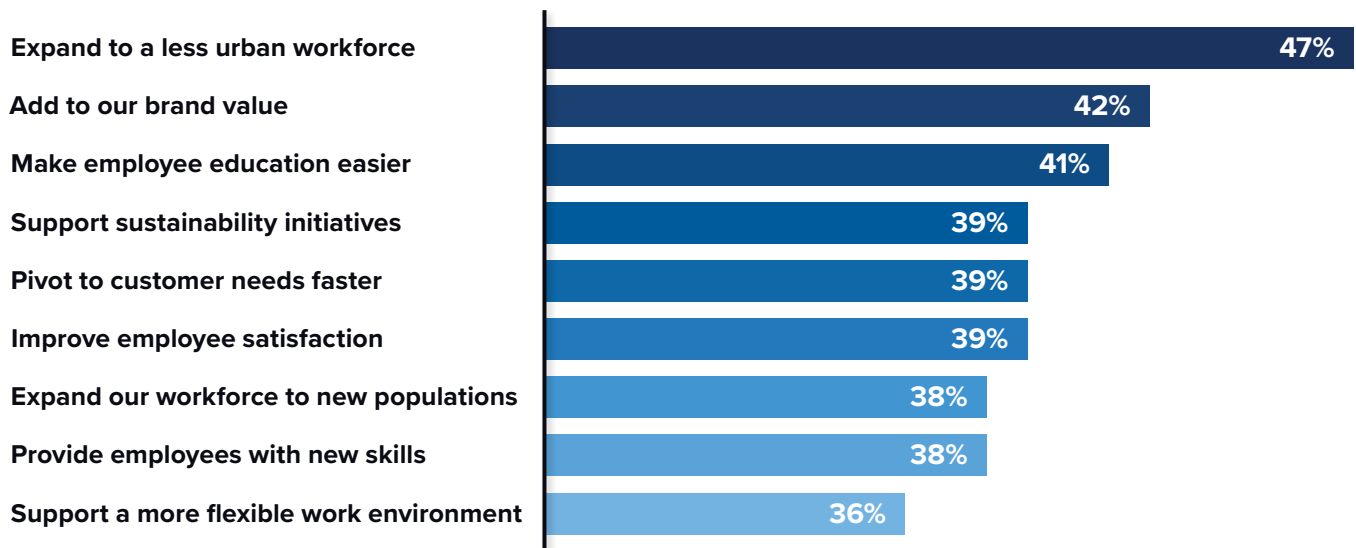

n = 264
Source: IDC Survey, August 2021

The average Salesforce customer reported project payback of one year; 58% reported payback in *less* than a year.

IDC also asked about less quantifiable benefits of using Salesforce cloud services, as shown in **Figure 7**.

FIGURE 7

What Salesforce Allows Customers to Do

(% using Salesforce Cloud services allows us to…)

Expand to a less urban workforce	47%
Add to our brand value	42%
Make employee education easier	41%
Support sustainability initiatives	39%
Pivot to customer needs faster	39%
Improve employee satisfaction	39%
Expand our workforce to new populations	38%
Provide employees with new skills	38%
Support a more flexible work environment	36%

n = 264
Note: Rating 9 or 10 on Scale 1-10, 10 highest
Source: IDC Survey, August 2021

Figure 7 is a somewhat dry and static representation of a major undercurrent in technology deployment, showing a focus on employee as well as customer needs, adaptation to a world with more distributed workforces, the upskilling and reskilling of employees, and the making of sustainability core to a company's mission. Both sidebars in the document provide more details on this sea change.

The Power of the Ecosystem

Supporting the juggernaut that is Salesforce is a constellation of companies selling ancillary products and services, from add-on cloud subscriptions and software to IT services, networking, security, hardware, training, and support. It's an ecosystem, and it is large, a juggernaut itself.

In fact, IDC sizes this global Salesforce ecosystem as five times as big as Salesforce itself this year and expects it to grow to more than six times as big by 2026.
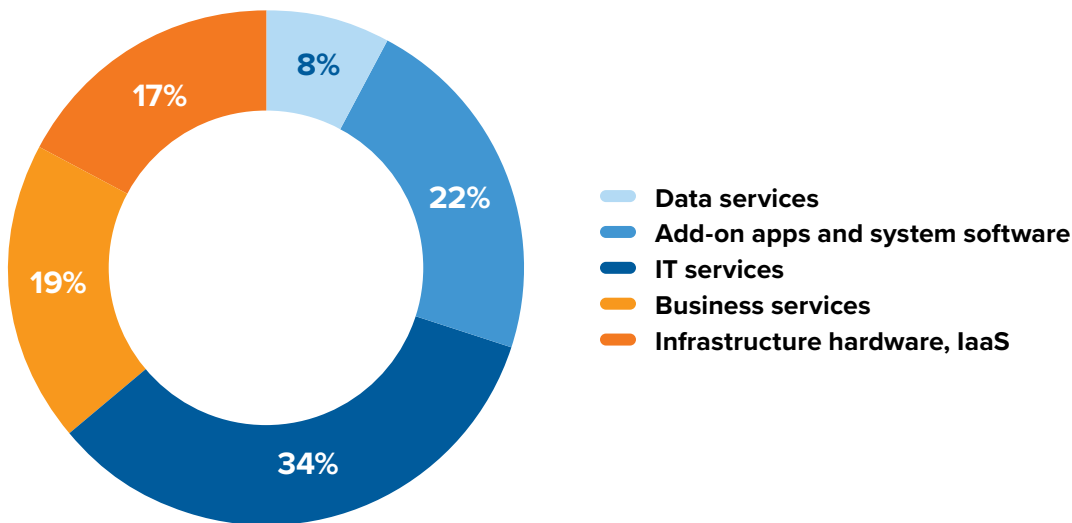
To be specific, for every dollar Salesforce makes this year, the ecosystem will make $4.96. And that is expected to grow to $6.19 by 2026.

These revenues are broken down by offering, as shown in **Figure 8**.

FIGURE 8

The Ecosystem Fills in the Blanks

(% revenues in 2021 in the ecosystem's supporting products and services)

- Data services
- Add-on apps and system software
- IT services
- Business services
- Infrastructure hardware, IaaS

Source: IDC Survey, 2021

These categories' shares are expected to remain relatively stable over time, although IDC expects some IT services to migrate to business services as digital transformation efforts progress. There are also differences by region, with business services being a smaller share in emerging geographies, and IT services, and hardware and networking being higher.

Figure 8 also gets at the complexity of modern cloud implementations. The applications touch many parts of the organization and many other IT products. In fact, when given a selection of attributes of Salesforce partners they valued, respondents reported that even more valuable than industry expertise or knowledge of the Salesforce products being implemented was the ability to "integrate across Salesforce solutions."

Note: The White Paper referenced in footnote 4 has a deep discussion of the importance of integration and the economic payoff in digital transformation efforts.

But between now and 2026, the Salesforce ecosystem faces a significant opportunity: $817 billion in net-new revenue above the 2020 level, or 20% growth a year.

The Talent Challenge

The Salesforce ecosystem's challenge getting to 2026 will be one of dealing with that 20% growth rate. Salesforce alone has more than 60,000 employees. Straight-line math would say the ecosystem has 300,000 (although IDC has not sized the ecosystem workforce for this project). Doubling those numbers in a handful of years will drive a race for talent.

Now add in the job gains expected in the customer base.

Here, IDC has sized the workforce and, along the way, classified this future workforce by occupation. This data is available via Salesforce's Tableau visualization engine. To access, click here.

While estimating the job counts by occupation, IDC also analyzed both the percentage needing skills functional to the occupation, such as certification, schooling, or extensive on-the-job training, and the percentage that will need significant new digital skills above and beyond the ones they have now.

As a percentage of the total, the two categories turned out to be quite different. Functional skills come with the occupation — doctors, teachers, skilled craftspersons, and so forth.[5] People aren't in the occupation if they don't have (or quickly learn) the required skills. The functionally skilled jobs sit steady at 66–68% of total jobs created from the use of Salesforce cloud services.

The percentage of new Salesforce economy direct jobs (refer back to **Figure 4**) leveraging new digital skills, on the other hand, will grow over time, as shown in **Figure 9**.

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[5] And these are workers at companies with computers, companies big enough and sophisticated enough to warrant the use of Salesforce cloud services. This cuts out whole classes of unskilled jobs.

FIGURE 9

Digital Skills Will Need to Grow

(% of new jobs needing supplemental digital skills)
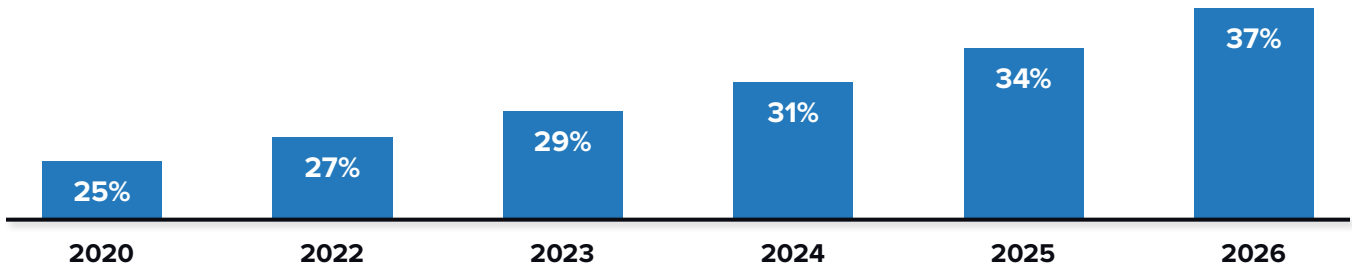
Source: IDC, 2021

What are these digital skills? They vary by occupation, including dealing with Internet of Things in the trades, new automation tools in medicine, or interfacing with complex applications that require time and attention. These could be learning new collaboration tools, creating chatbots, or working with new AI-assisted programs.

The talent crunch is upon us.

The Salesforce Helping Hand

The relentless pace of growth of use of cloud services will bring all sorts of challenges for Salesforce customers, from simply integrating new technology with the old to retraining workers or hiring new ones.

Here, Salesforce has made some significant moves that should help.

The acquisition of Tableau Software and MuleSoft have added analytical and integration tools into the product line, key technologies for advancing digital transformation and taking some of the load off IT departments. The 2021 acquisition of Slack Technologies adds next-generation collaboration into the mix, again taking the load off customers facing a radical "future of work."

Then there is the Salesforce AppExchange, a marketplace where technology partners can offer products that integrate with the Salesforce platform and consulting partners can offer implementation services, all of which are available as listings on AppExchange. For customers, it serves as an "app store" for solutions that fit specific business needs.

According to the survey, more than 80% of customers have used the service to obtain products or services.

But Salesforce has also invested heavily in its free online user training program, called Trailhead, which, as of the time of the publication of this White Paper, has issued 35 million training completion "badges" to 3.6 million users from 30+ countries. The survey showed wide awareness of the Trailhead program, with 74% of responding Salesforce customers saying they were aware of Trailhead.

Conclusions, Musings, and Advice

The conclusions are clear. Salesforce and its ecosystem are doing something right, with a broad positive impact on local economies and within their customers' organizations. Their growth and customer support are indicative of that. So is leadership in support of customer digital transformation efforts and increased investment in helping customers upskill their workers.

It's also clear that dealing with growth, the post-pandemic transformation of work, and the need for talent will be challenges — for Salesforce, its ecosystem, and its customers.

So far, Salesforce seems to be successfully facing those challenges, but the past may not be prologue to the future. Knitting acquisitions into the organizations and their offerings into the Salesforce platforms will take work. And helping customers deal with not only the transformation of IT in digital transformation but also the transformation of the organization itself may fall outside Salesforce's wheelhouse. But customers will nevertheless look for help.

Customers will be looking inside, outside, and everywhere for help. The first stop will be Salesforce and its partners. But this won't be the last.

A Word About Data

While this White Paper is replete with data, what's shown is just the tip of a data iceberg. The full study dataset is available via Salesforce's Tableau visualization engine. To access, click here.

How Cloud Computing Cuts CO_2 Emissions

Salesforce has made very public commitments to sustainability, including to the United Nation's Sustainable Development Goals around clean energy and climate action. Specifically, in its 2021 *Stakeholder Impact Report*, Salesforce set out a goal of consuming 100% renewable energy by next year with net-zero carbon emissions from its cloud computing.

Worthy goals.

Salesforce is also helping its customers support their own sustainability goals, as shown in **Figure 7**, where 39% of respondents rated Salesforce cloud services as a major support of their own sustainability objectives.

Beyond Salesforce and its ecosystem and customer efforts to support sustainability, there is another force at work: the inherent carbon emission reduction in migrating from on-premises computing to the cloud.

This year, in a first-of-its-kind study, IDC forecast the potential reduction of carbon emissions resulting from the migration to the cloud.[6] Over the four years from 2021 to 2024, that could be as much as 1 billion metric tons of CO_2.[7] The driving forces include the migration of computing from individual company datacenters to more efficient hyperscale datacenters and specific efforts by cloud vendors to use more sustainable power and cooling.

IDC has not yet sized the contributions of individual vendors to this 1 billion metric tons nor the ratio of CO_2 emissions reduced from the use of cloud to CO_2 emissions reduced in other ways, but as a major provider of cloud services, Salesforce's contribution is nontrivial.

And that's not even counting the tools Salesforce offers its clients to support their own carbon reduction emissions, such as the Sustainability Cloud, or its actions as a vendor asking suppliers to set sustainability goals.

These actions can be seen as force multipliers for the CO_2 reduced from the migration to the cloud.

The data presented in The Impact of COVID-19 sidebar tells the story.

In short, COVID-19 has had a disruptive impact, and from the looks of **Figure 10**, some of that impact on society and the economy will be permanent. Yet, not all disruption is bad — especially for those organizations already working on managing the disruption entailed in digital transformation.

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[6] *Worldwide CO_2 Emissions Savings from Cloud Computing Forecast, 2021–2024: A First-of-Its-Kind Projection* (IDC #US47426420, February 2021)

[7] According to the U.S. EPA, 1 billion metric tons of CO_2 is the equivalent of the CO_2 produced by 2.5 trillion miles driven by passenger cars (www.epa.gov/energy/greenhouse-gas-equivalencies-calculator).

The Impact of COVID-19

In the survey conducted for this White Paper, IDC asked specifically about the impact of COVID-19 on respondents' cloud implementations and learned this: 17% of Salesforce respondents said that COVID-19 slowed their cloud deployments and 26% said it accelerated them. The rest said it had no impact. Details are provided in the bullet lists that follow.

The Impact of COVID-19 on Cloud Deployments: Accelerated

→ Cloud allowed us to respond to customers faster: **71%**

→ The pandemic drove us to cloud to be competitive: **63%**

→ Supporting remote work drove us to the cloud: **43%**

→ Customer/market disruption drove us to the cloud: **48%**

→ The pandemic forced us to take a more omni-directional approach: **42%**

The Impact of COVID-19 on Cloud Deployments: Delayed

→ Disruption of our workforce slowed deployment: **63%**

→ Spending priorities changed our deployment schedule: **56%**

→ We lacked the technology to support a remote workforce: **46%**

→ Revenue fell off so we had to slow investments: **41%**

FIGURE 10

The Impact of COVID-19 on Remote Work (all respondents)

(% of cloud-using employees working remotely)

Before the pandemic	During the pandemic	In 2022	In the next five years (2026)
6%	51%	37%	26%
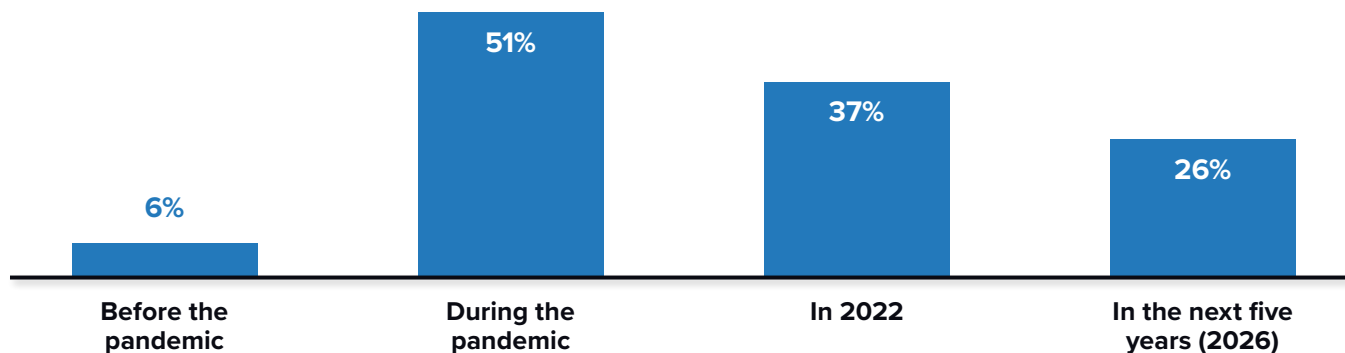
Source: IDC, 2021

Methodology

IDC's EIM and the Benefits of Cloud Computing

IDC maintains an internal model (the Economic Impact Model, or EIM) that takes inputs from IDC's market research on IT spending, spending on cloud computing, exchange rates, vendor market share, and inputs from external sources on GDP, population, disposable income, and labor forces. Using research-driven algorithms, the model forecasts the revenues in a geography created in user organizations from the use of cloud computing.

IDC then takes those revenues and computes, using research on GDP, gross output, and disposable income per worker, the number of jobs supported by those revenues in the current year. IDC uses standard growth rate ratios between revenue growth and job growth to quantify job creation in future years. Typically, if revenues grow x% a year, commensurate job growth will be 0.5–0.7 times x. In other words, new jobs grow more slowly than revenues.[8]

The Salesforce Economy

As a major vendor of cloud services, Salesforce accounts for a significant share of the benefits to the general economy from cloud computing.

To compute the Salesforce-specific share of revenues and jobs created by the use of cloud computing, IDC relies on unpublished estimates of Salesforce's future revenues as a percentage of the revenues of all cloud vendors and IDC estimates of additional cloud services delivered by the ecosystem.

Note that the ecosystem may include companies that are not formal business partners of Salesforce but that nevertheless sell products or services associated with the Salesforce implementations.

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[8] For example, if revenues grow 5% from one year to the next, job growth would come in at 2.5–3.5%.

Occupational splits in the study were developed using forecasts from the U.S. Bureau of Labor Statistics on the head count and growth of 800+ occupations. IDC used previous studies to winnow down occupational counts to workers at companies with computers, then companies sophisticated enough to be using cloud computing. IDC then used adjustments based on external data on individual country economies to adjust occupational share of the workforce for that country. This is under an assumption that the workforces of companies using cloud computing will be less heterogeneous than the country economies as a whole.

The Salesforce Ecosystem

To size the Salesforce ecosystem, IDC starts with its estimates of Salesforce revenues by country by year, based on IDC tracker data for cloud software and professional services revenues by vendor. These, Wall Street estimates, and Salesforce financials are used to forecast past revenue and revenue a year out. The outer-year forecasts grow Salesforce revenues at the forecast growth rate of the various software submarkets in which IDC tracks Salesforce. This is the denominator of the ecosystem revenue ratio.

The numerator is calculated using IDC market studies, bulwarked by past and present surveys, that show relationships between product and service categories — for example, the ratio of IT services to application software, business services to IT services, network line charges to infrastructure hardware, and so on.

This information is encapsulated in an IDC proprietary model (The Salesforce Ecosystem Model) with a calculation page for each country.

The specific categories compared with Salesforce software as a service, platform as a service, and professional services revenues include:

→ Add-on applications, including additional cloud services

→ System software

→ IT services, including managed services, project-oriented services, training, and support

→ Business services and consulting

→ Infrastructure hardware (e.g., storage and network equipment)

→ Infrastructure as a service

→ Data services

The aggregate of the revenue components calculated in this way becomes the estimate of ecosystem revenues and the numerator of ratio.

For simplicity, IDC aggregates some categories for display in the published output (refer back to **Figure 8**).

Key Definitions in Support of Figures

→ Direct jobs are those created in the Salesforce customer base from the use of cloud computing.

→ Indirect/induced jobs are those created by spending in the general economy by people filling the direct jobs and by spending on local goods and services by Salesforce and its ecosystem.

→ Net gain in jobs is the difference from year-end 2020 to year-end 2026. For revenue, it is the aggregate difference from each year to 2020.

→ Business revenues are those created in the Salesforce customer base from the use of cloud computing. They do not equate directly to GDP.

Revenues from recent Salesforce acquisitions, including Slack Technologies, MuleSoft, and Tableau Software have been folded into the historical view of Salesforce revenues as well as forecasts.

Exchanges rates used in the modeling for this White Paper are those of full-year 2020. All views are in constant dollars.

The direct jobs created by the use of cloud computing are from spending in the region/country studied. The assumption is that those jobs will *also* be located in that region/country, but that may not always be the case.

Changing Inputs

Between the modeling done for the pre-COVID 2019 study and the current study, many inputs changed as the pandemic affected economic activity. The growth in worldwide revenues went from 2% in 2019 to -4% in 2020. IT spending also dropped, but not as much.

The significant input changes included:

→ Lower overall IT spending and cloud spending for 2020 than forecast in 2019 (Growth returned this year, but came from a smaller base.)

→ New Salesforce revenues and overall revenues created by cloud forecasts

→ Drastically different ratios of job growth compared with revenue growth (e.g., practically 0% in 2020, and less than 0.5 times revenue growth in 2021)

→ New third-party data on revenue per head in India that lowered the historical and forecast job count for India and, because of the size of its labor force, the total worldwide head count

→ At the country level, various changes in IDC cloud spending forecasts and Salesforce revenue estimates that affected individual countries in comparison to the levels in the 2019 study

Exchange Rates

All IDC modeling inputs and forecasts are in constant dollars at the average annual exchange rates of 2020.

The Survey

To support the assumptions driving the model and to present current real-world information about the Salesforce economy, IDC conducted an online survey in August 2021 of 531 decision makers familiar with their organization's cloud deployments across Australia, France, Germany, Japan, New Zealand, Singapore, the United Kingdom, and the United States.

Questions related to the penetration of cloud services in the deployments, the impact of the COVID-19 pandemic, the expectations of benefits from the use of cloud, and products and services involved in implementations.

About the Analysts

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As Senior Vice President of IDC, John Gantz has responsibility for IDC's worldwide demand-side research, global market models, and research quality control and standards. He is also a member of IDC's management committee, chief architect of IDC's Worldwide Digital Marketplace Model (formerly the Worldwide Internet Commerce Market Model, TM) IT Economic Impact Model, and PC Software Piracy research. He is one of IDC's chief spokespersons on broad technology and market issues at major forums in the United States and around the world.

More about John F. Gantz

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Alan Webber is Program Vice President for Digital Strategy and Customer Experience. In this role, Alan leads IDC's Customer Experience research program as well as supporting IDC's Chief Marketing Officer's research efforts. Specific areas of research interest for Alan are the impact that technology changes have on how business and customers engage and interact, the digital transformation of the customer experience, and the impact of algorithms and analytics.

More about Alan Webber

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