

Securing the SMB opportunity in Australia and New Zealand



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Executive summary

Two trends are converging to create a pressing need in the market and an opportunity for Microsoft partners in Australia and New Zealand.

Small and medium-sized businesses (SMBs) are accelerating their digital transformation journeys.

SMBs are turning to platform solutions to help them do more with less.

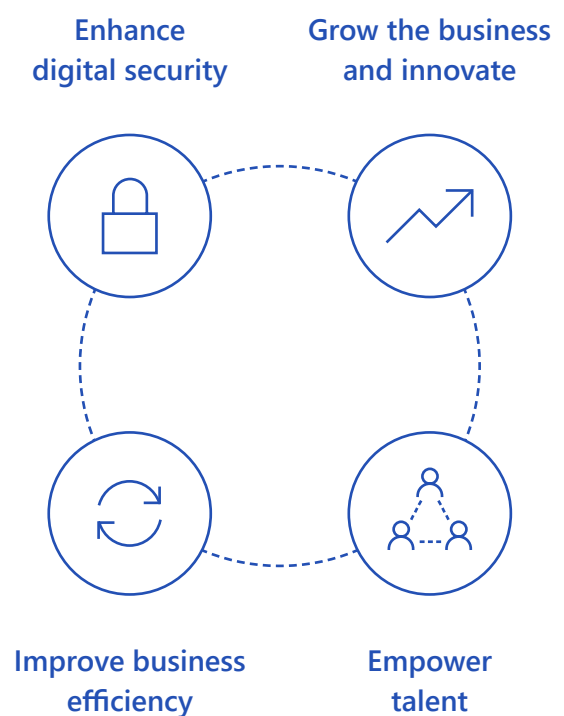
These trends are strongly connected. Many SMBs recognise that digitally transforming their activities and consolidating vendors can act as deflationary forces in an inflationary economy. As pressures from the evolving global economy increase, many SMBs are reducing costs through vendor consolidation and by optimising operations. As they continue to shift to a world of hybrid work, SMBs are looking to do more with less.

With nearly 65 per cent of SMBs preferring to purchase a suite of software solutions that meets all their business needs, Microsoft partners have a real opportunity to help customers navigate this environment through the Microsoft platform.

This paper brings together research commissioned by Microsoft to provide a detailed breakdown of the SMB market in Australia and New Zealand (ANZ). It unpacks the opportunity areas for partners by customer segment and business need. We estimate that the total addressable market (TAM) for SMB digital transformation technology and services in ANZ is A\$16.7 billion a year (as of 2022).

The core business needs highlighted in this paper are shown in Figure 1.

Figure 1:
SMBs' core business needs



Enhance digital security: SMBs can achieve this with the help of an end-to-end solution that supports security, compliance, identity management and privacy needs. They can also use managed services to help them remotely manage employees' mobile devices, security and storage.

Grow the business and innovate:

Attracting new business and driving innovation with the help of digital marketing automation; low-code and no-code tools; and better customer relationship management (CRM) and enterprise resource planning (ERP) solutions.

Empower talent through hybrid work:

SMBs will continue to invest in collaboration solutions to support working from home, building on the solutions that many have put in place over the past two years.

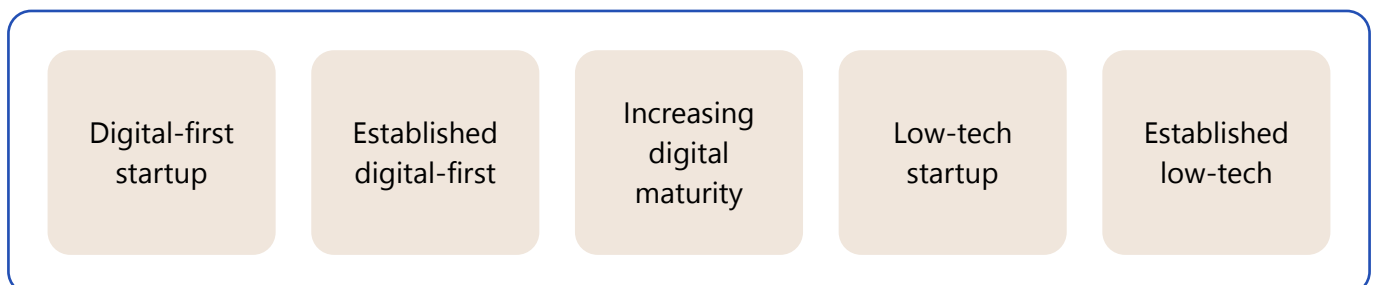
Improve business efficiency: Support for SMBs' digital transformation initiatives may involve migrating on-premises workloads (such as servers, storage and networking) to the cloud.

Through our research, we have identified a practical way to segment the SMB market by examining SMBs' digital maturity and business longevity. The largest opportunity to tap into comprises startups and digital-first businesses, many of which are independent software vendors (ISVs) operating under the software-as-a-service (SaaS) model. We have isolated five customer segments, each with different technology priorities, critical workloads and outsourcing preferences, as shown in Figure 2.

"The SMB market presents an enormous opportunity for our partner community to grow their businesses while making a positive economic and social impact across Australia and New Zealand at a critical time."

Vanessa Sorenson
Chief Partner Officer ANZ and Managing
Director Microsoft New Zealand

Figure 2:
Microsoft's five SMB customer segments



Serving SMBs in a changed world

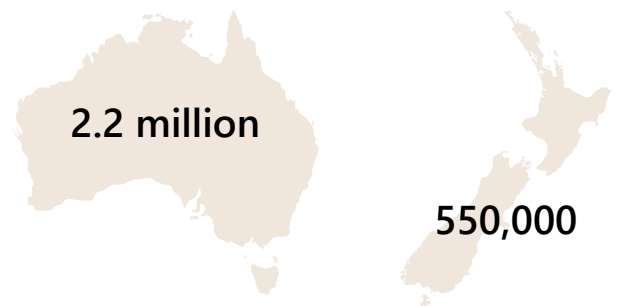
SMBs account for 95 per cent of companies worldwide¹, 65 per cent of the world's employment and 40–70 per cent of gross domestic product in their respective countries.²

While exact definitions of 'SMB' vary, these businesses typically range from sole traders to organisations with up to 300 employees.

SMBs make up the largest commercial segment in our region. There are more than 2.2 million SMBs in Australia³ and more than 550,000 in New Zealand.⁴

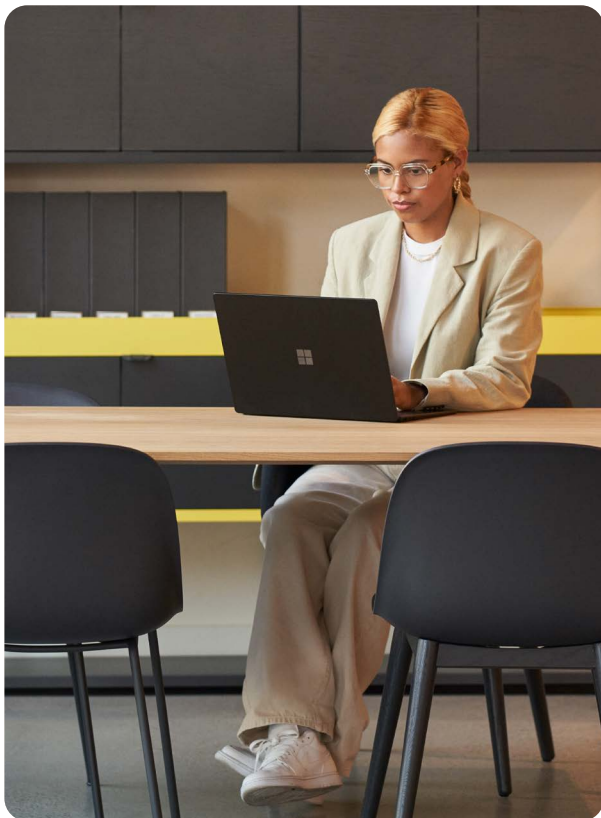
It is not an exaggeration to say they are the cornerstone of every community.

Figure 3:
Number of SMBs in ANZ.



Technology investment as a deflationary force

Two trends are converging to create a pressing need in the market and an opportunity for Microsoft partners in Australia and New Zealand: the global economy has entered a period of slower growth and high inflation, and SMBs are accelerating their digital transformation journeys.



1 World Bank, World Bank SME Finance.

2 US Small Business Administration, *Annual Report of the Office of Economic Research, FY 2019 – SBA's Office of Advocacy.*

3 Australian Bureau of Statistics, *Counts of Australian Businesses, including Entries and Exits, July 2018 – June 2022.*

4 Stats NZ, New Zealand business demography statistics: At February 2021.

The World Bank has predicted growth in advanced economies will sharply decline from 5.1 per cent in 2021 to 2.6 per cent in 2022, and then further moderate to 2.2 per cent in 2023.⁵ This reflects the unwinding of fiscal and monetary policy support from governments during the pandemic, as well as disruptions to investment and trade caused by the war in Ukraine.

Many SMBs recognise that now is an ideal time to increase their focus on transforming traditional economic activities using technology, to build smart and agile digital economies. As Microsoft CEO Satya Nadella has put it,

“The case for digital transformation has never been more urgent or clearer. Digital technology is a deflationary force in an inflationary economy.”⁶



51%

Just over half of SMBs expect their technology partners to proactively recommend new solutions.

Barriers to digital transformation or opportunities for partners?

Despite this, market research commissioned by Microsoft shows that 75 per cent of small businesses have at least one barrier to them meeting their digital acceleration goals. Cost is a concern for nearly half (47 per cent) of SMBs, but a large proportion also struggle with comparing solutions and making decisions, technical concerns or understanding the business impact of technology investments (38 per cent in each case).⁷

Herein lies the opportunity. We know that SMBs look to partners as trusted technology enablers, for advice on the best, most secure solutions and to provide the implementation capabilities they lack internally. Just over half of SMBs (51 per cent) expect their technology partners to proactively recommend new solutions.⁸ This is why SMBs' IT spend on managed service providers (MSPs) and system integrators will grow 12 per cent annually until 2025.⁹



SMBs' IT spend on MSPs and system integrators will grow 12 per cent annually until 2025.

5 World Bank, Global Growth to Slow through 2023, Adding to Risk of 'Hard Landing' in Developing Economies.

6 Swiss Fund & Finance Platform, Cloud Computing: 'Digital Technology is a Deflationary Force in an Inflationary Economy.'

7 Microsoft, Microsoft small and medium business (SMB) voice and attitudes to technology study.

8 Ibid.

9 Analysys Mason, SMB IT spending 2022: new 5-year priorities, insights and opportunities.

Connecting technology to business priorities

SMBs in Australia and New Zealand are experiencing rapid change and growth. They're reinventing their business and operating models in response to the pandemic, growing cybersecurity threats, the shift to remote working, evolving customer needs, the shift to remote working, and new sources of economic uncertainty such as climate change.

During the early and peak stages of the pandemic, SMBs were focused on survival – cutting costs and ensuring employees could continue to work remotely. Now, many are revisiting their technology choices to see if they have the right systems in place to achieve their long-term business goals. Analysys Mason estimates SMBs' worldwide spending on IT products and services will grow by 5.9 per cent in 2022, increasing to 8.0 per cent year-on-year by 2027.¹⁰

SMB business objectives

Enhance digital security

Like larger organisations, SMBs need to protect customer data and intellectual property from cyberthreats stemming from distributed and remote workforces and the rise of 'bad actors'.

Grow the business and innovate

To attract new customers and increasing revenue from their existing customer base, SMBs must spot emerging trends and act quickly to bring new offers to market.

Empower talent through hybrid work

This is increasingly important as we all navigate a world with fully remote or hybrid working environments for the foreseeable future. 80 per cent of SMBs expect to have a hybrid workforce for at least the next two years.¹¹

Improve business efficiency

By having one platform on which they can run their business from end to end, SMBs can reduce complexity and avoid unnecessary costs and overheads.

¹⁰ Analysys Mason, SMBs' IT spending will increase to USD1.4 trillion in 2022.

¹¹ Microsoft, Small and medium-sized businesses growing fast by embracing digital technologies.

Technology solutions

SMBs will prioritise investment and technology choices in the next few years to fulfil the following needs.

Enhancing digital security

SMBs will continue to spend on cybersecurity to prevent malicious attacks and protect vital data assets. They will look for end-to-end platform solutions that span security, compliance, identity, management and privacy. They may also look to managed services to help them remotely manage employee's mobile devices, security and storage.

Customer growth and innovation through business applications

SMBs will continue to drive growth and innovation by increasing their spending on CRM and ERP solutions, digital marketing automation, and low-code and no-code tools.

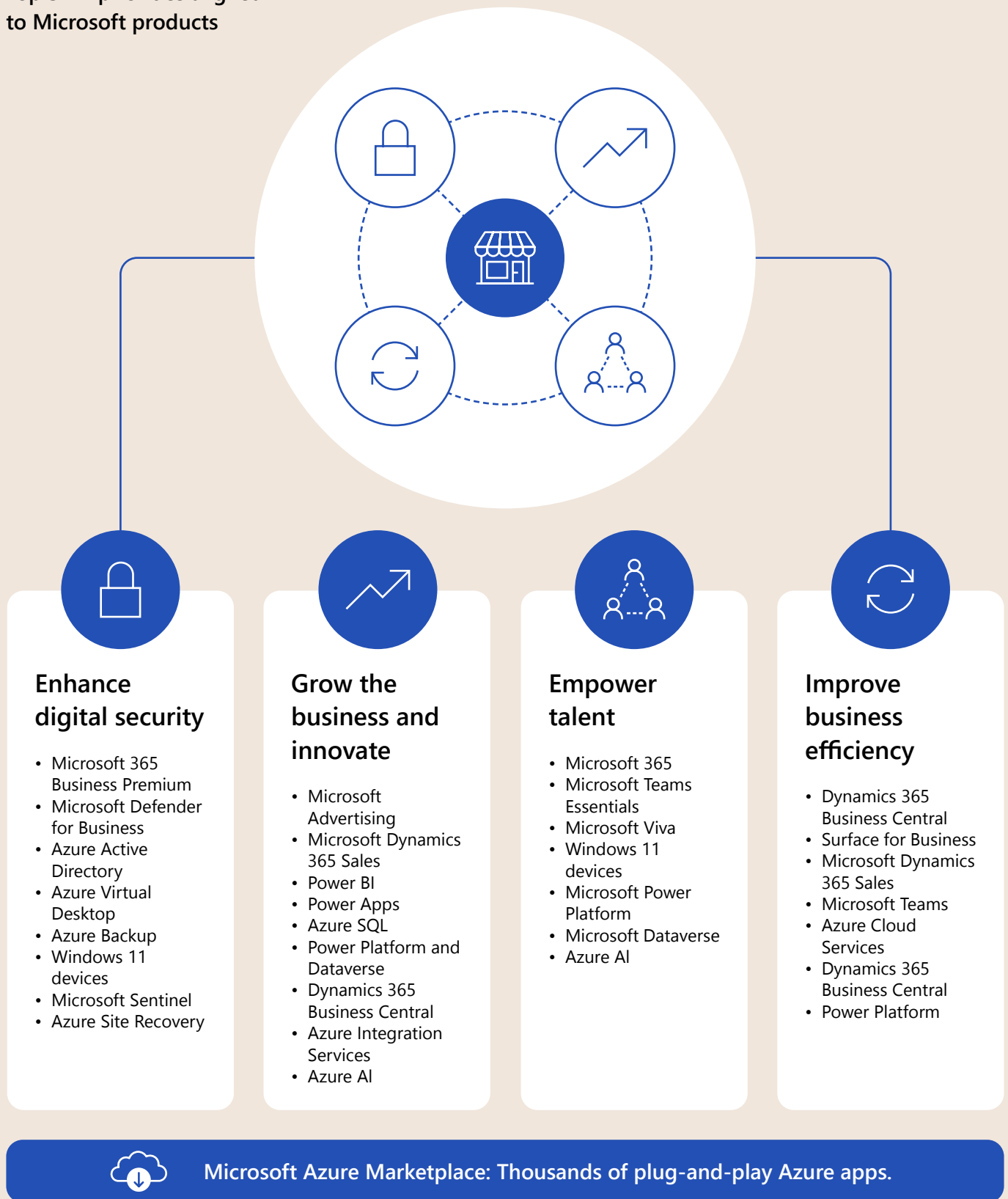
Empowering teams through hybrid work

Recognising that fully remote or hybrid working arrangements are not just a pandemic-related aberration, SMBs will continue to invest in collaboration solutions to support working from home, building on the solutions that many have put in place over the past two years.

Increasing efficiency by moving to the cloud

To improve operational efficiency, SMBs will invest in digital transformation initiatives that involve migrating on-premises workloads (such as servers, storage and networking) to the cloud. Two-thirds of their spending on business applications will come from SaaS solutions in 2023.¹²

Figure 4:
Top SMB priorities aligned
to Microsoft products



Understanding the SMB market

Not surprisingly, the 2.7 million SMBs across ANZ are not all the same. They don't behave the same when it comes to running their business, making decisions, or buying and using technology.

One traditional way to segment SMBs and their technology needs is by number of employees, as shown in Table 1.

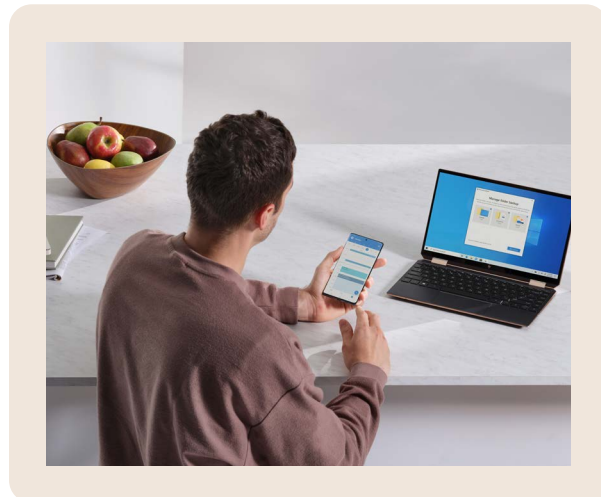
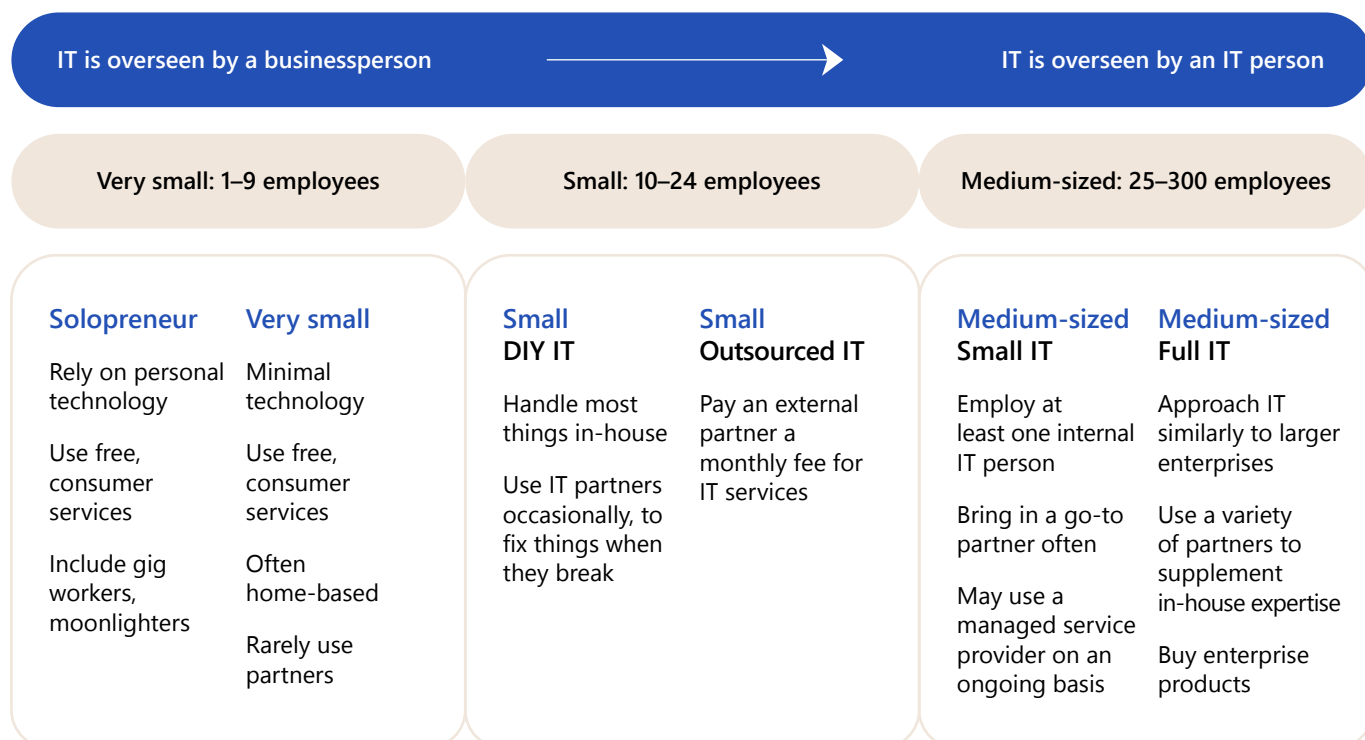


Table 1:
Segmenting SMB technology needs by number of employees



Digital maturity vs business longevity

Our research used a more practical way to look at SMBs based on their technology needs and how you can best serve them using Microsoft technology.

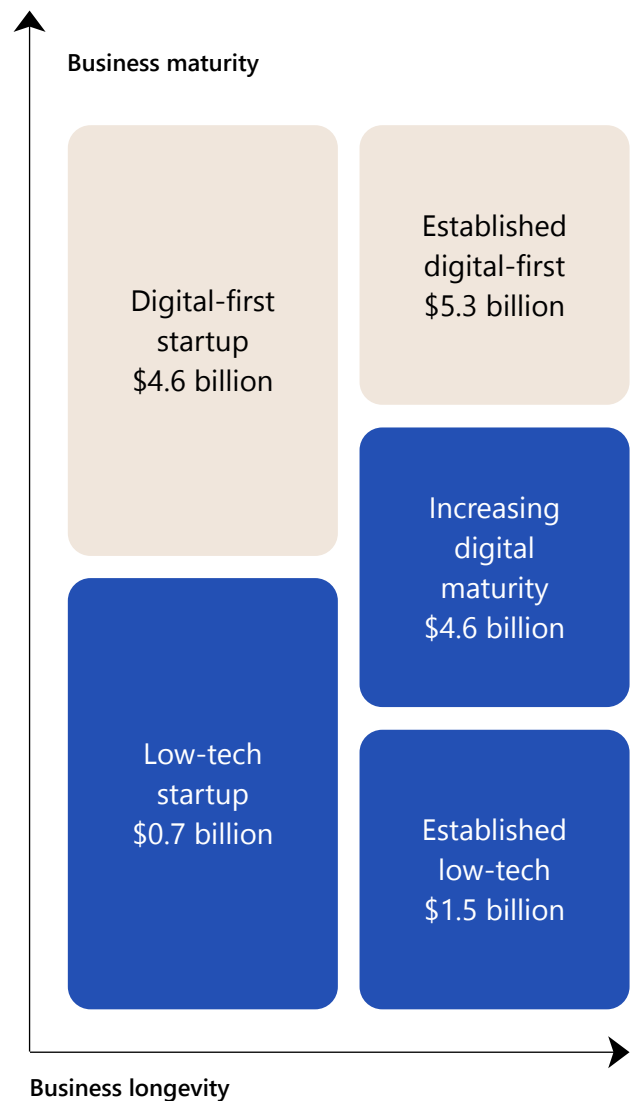
Over the past 15 years, we have seen an increasing number of digital-first businesses whose products or services have been built on enabling technologies. Many are known as ISVs or SaaS businesses.

These businesses use a greater amount and a wider range of technology than the typical SMB. A digital-first business:

- is built around modern technologies and data across all aspects, from operations to business models to customer engagement
- uses agile methodologies and may have a dedicated DevOps team
- scales its operations and innovates much faster than traditional businesses
- relies heavily on its digital infrastructure to operate smoothly and serve its customers.¹³

In addition to digital maturity, we differentiate businesses based on their longevity. Those that have been around for fewer than seven years tend to have different technology approaches and needs than their more established counterparts. This results in the segmentation shown in Figure 5.

Figure 5:
Segmenting SMBs based on digital maturity and business longevity, with the TAM for each segment.



Following is a summary of each segment. For more detailed profiles, see 'Appendix: SMB segments in detail' on page 23.



Digital-first startup

Customers in ANZ	TAM	Digital transformation	Likely investments in next 1–2 years
50,000	\$4.6BN	<div><div></div></div>	<ul style="list-style-type: none"> • Analytics • Marketing automation • Security

Digital-first startups are those that have been in business fewer than seven years. They are innovative and tech-savvy, with a desire for high growth and venture capital investment. Business drivers include cost, business growth with agility, growing the value of its intellectual property, and investing in technology for innovation.

These businesses are already a long way into their digital transformation journey. Their straightforward, rapid approach to technology purchasing decisions will make it relatively easy for you to help with the transformation process. A large proportion of these businesses are SaaS companies, also known as ISVs.



Established digital-first

Customers in ANZ	TAM	Digital transformation	Likely investments in next 1–2 years
47,000	\$5.3BN	<div><div></div></div>	<ul style="list-style-type: none"> • Security • CRM • Hybrid work • Marketing • Analytics

Digital-first SMBs that have been around for more than seven years seek to continue to grow and scale, acquire new customers, improve profitability, save time, and optimise their business processes.

These SMBs are always looking to capitalise on new transformation opportunities, but their decision-making processes are more complex than those of younger companies. Still, it will be easier for you to win digital transformation deals with companies like these than with more traditional SMBs. A large proportion of these businesses are SaaS companies, also known as ISVs.



Increasing digital maturity

Customers in ANZ	TAM	Digital transformation	Likely investments in next 1–2 years
74,000	\$4.6BN		<ul style="list-style-type: none"> • Security • Hybrid work • Inventory management • Marketing automation

These established businesses are often based on a bricks-and-mortar model but are looking to digitise more operations to increase their reach and scale, find new opportunities, and improve profit margins.

These SMBs will likely have already achieved some quick wins in digitally transforming parts of their business. For this reason, it will be a challenge to get them to accept your help with their digital transformation. However, there is still a large addressable market among companies of this kind.



Low-tech startup

Customers in ANZ	TAM	Digital transformation	Likely investments in next 1–2 years
230,000	\$0.7BN		<ul style="list-style-type: none"> • Security • Inventory management • Analytics

These less mature SMBs are likely to be entrepreneurs or self-starters with fewer than 20 employees. They typically work in areas such as services, consulting and small-scale retail.

This segment of SMBs is least likely to view technology as critical to business. They might be interested in digital transformation but don't know where to start. They may have been forced into adopting technology due to changing regulations or market conditions.

This is the most challenging segment to help with digital transformation, leading to a much smaller TAM than for other types of SMBs.

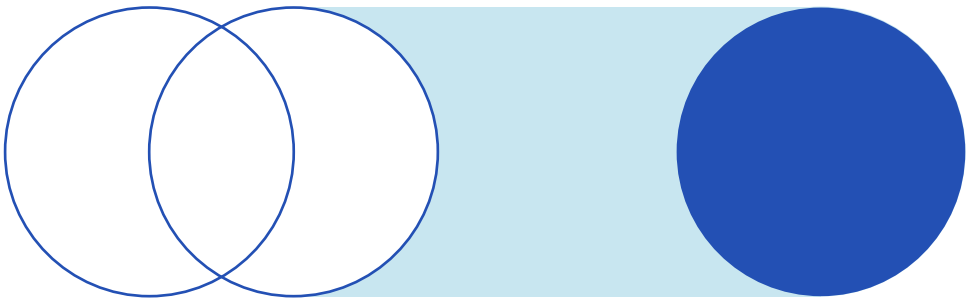


Established low-tech

Customers in ANZ	TAM	Digital transformation	Likely investments in next 1–2 years
360,000	\$1.5BN		<ul style="list-style-type: none">• Hybrid work• Inventory management• Security• Marketing automation

These SMBs have been in business for more than seven years and are pleased to maintain their market position or steadily grow. These are technology laggards that want exceptional value from their IT products and services.

Their basic technology skills and complex decision-making processes make them a challenging segment to help with digital transformation. However, there are opportunities given the vast number of these SMBs in the ANZ market.



SMBs will look to partners that match their needs

SMBs are increasingly looking for help to build a digital transformation strategy in line with their business goals and aspirations. As previously mentioned, 51 per cent of SMBs expect their technology partners to proactively recommend new solutions.¹⁴

Many will turn to IT service providers as a source of trusted advice and guidance. There is a A\$16 billion opportunity here for partners, but you may need to evolve your offering to meet the needs of SMBs in a commercially beneficial way.

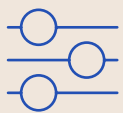
What partners deliver



Trusted
advice



Industry
expertise



Customised
solutions



ESG
impact

SMBs are looking for partners to deliver:

Trusted advice

SMBs want partners that can help them build the technology that will enable them to evolve their services as their business grows, and achieve their long-term strategic business goals. You can support them with Microsoft solutions and ISV solutions available through the Microsoft app marketplace.

Industry expertise

You can help SMBs bring possibilities to life by tailoring technologies, services and governance frameworks that align to their target industry. This will help your customers stand out as experts in their domain, and to attract and retain the best people. Priority industries are financial services, retail, manufacturing, energy, healthcare, education and clean tech.

Customised solutions

Many SMBs want role-specific workflows and interfaces that reflect the needs of different teams within their organisation, or options to customise existing solutions in a way that helps to differentiate them from their competitors. You have a big market opportunity in tailoring solutions that were designed for enterprise to reflect SMB needs.

Environmental, social and governance impact

There are opportunities to deliver solutions that help SMBs meet their environmental, social and governance (ESG) goals, such as for sustainability, diversity and inclusion, ethical supply chains and privacy. Expect customers to be interested in your own ESG priorities and achievements in considering you as a supplier.

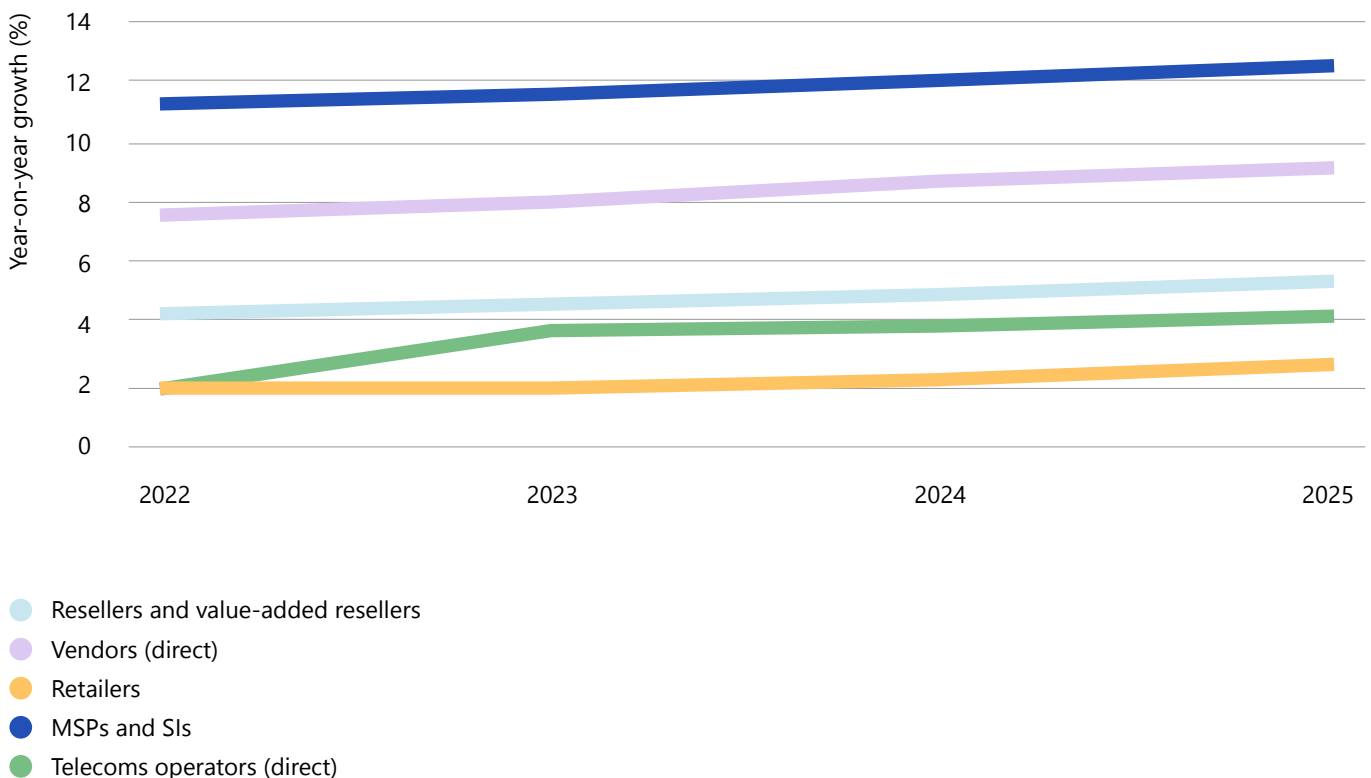
¹⁴ Microsoft, Microsoft small and medium business (SMB) voice and attitudes to technology study.

SMBs prefer to work with MSPs and systems integrators (SIs) that can provide informed advice and deliver technology capabilities, not just sell products. SMBs' spending on MSPs and SIs will grow 12 per cent annually between 2021 and 2025, according to forecasts by Analysys Mason, while retailers' business will only grow by 2 per cent and resellers' by 5 per cent (see Figure 6).¹⁵

The preference for managed services is corroborated by internal Microsoft customer and partner surveys, which show that customers who work with partners that offer full service are the most satisfied.

However, research from Analysys Mason strikes a tone of caution for partners: up to **40 per cent of SMBs surveyed reported switching IT services suppliers in the past year because they were not satisfied with the services received.**¹⁶

Figure 6:
Managed services providers and systems integrators will grow faster than other partners
(Analysys Mason SMB IT spending by channel, worldwide, 2022–25)



¹⁵ Analysys Mason, SMB IT spending 2022: new 5-year priorities, insights and opportunities.

¹⁶ Analysys Mason, IT service providers in the USA are experiencing high levels of customer churn: business survey 2022.

Untapped opportunities for partners

There are huge untapped opportunities for Microsoft partners to expand their business and create unique value propositions for SMBs. In fact, we will need to grow our partner ecosystem to meet customer demand by helping existing partners expand their reach across our solution areas and adding new partners to the Microsoft partner ecosystem.

Significant growth areas for partners to unlock customer value include:

delivering cross-cloud solutions that leverage the complete Microsoft platform

expanding from software licensing towards services, with security as a priority

packaging intellectual property to create scalable out-of-the-box solutions built for SMBs

leveraging Microsoft's partner ecosystem and app marketplace

unlock digital-first startups customers (ISVs).



Microsoft Cloud
for Financial Services



Microsoft Cloud
for Healthcare



Microsoft Cloud
for Manufacturing



Microsoft Cloud
for Nonprofit



Microsoft Cloud
for Retail

Microsoft Cloud for Sustainability

Microsoft Cloud



Modern
work



Business
applications



Infrastructure



Digital and app
innovation



Data and AI



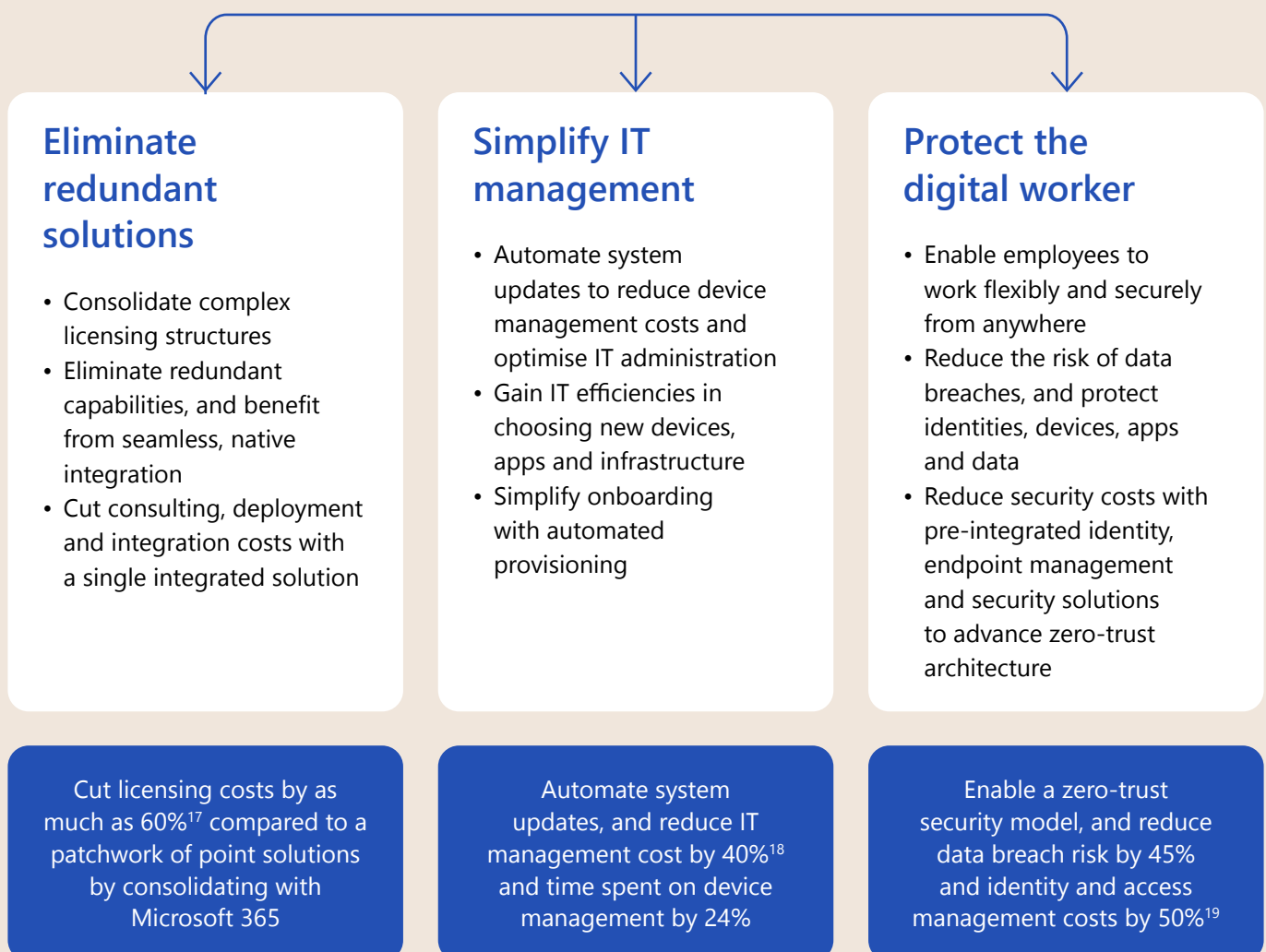
Security

Deliver cross-cloud solutions: doing more with less

Microsoft seeks to bring the value of the Microsoft Cloud to every SMB customer. SMBs have typically built a patchwork of technology solutions from different vendors, but Microsoft's comprehensive technology stack offers the opportunity to do more with fewer solutions.

Figure 7:

How Microsoft cloud solutions empower customers to do more with less.



¹⁷ Microsoft internal analysis.

¹⁸ Enterprise Strategy Group, *Exploring the Economic Benefits of Windows 365*.

¹⁹ Forrester Consulting, *The Total Economic Impact™ of Securing Apps With Microsoft Azure Active Directory*.

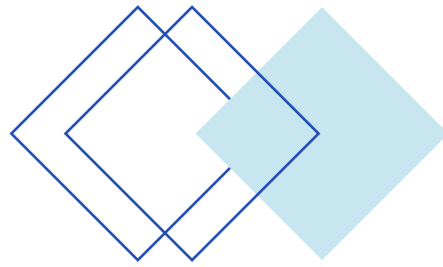
Expand services with security as a priority

SMBs are expanding their technology footprints through digital transformation. In doing so, they're looking for easy-to-use platform solutions to address key business priorities. Partners have a rapidly growing market opportunity to expand their services offering to include advanced workloads such as data, AI, analytics and business applications. Traditional MSPs will need to add these complementary workloads to keep up with customer needs.

90% of SMBs buy endpoint security²⁰

Security, governance and compliance remain foundational to partner offerings. Security is a key priority for SMBs as they look to mitigate the risks from cybersecurity threats.

90% of customers say they will switch IT partners if they are offered better security²¹

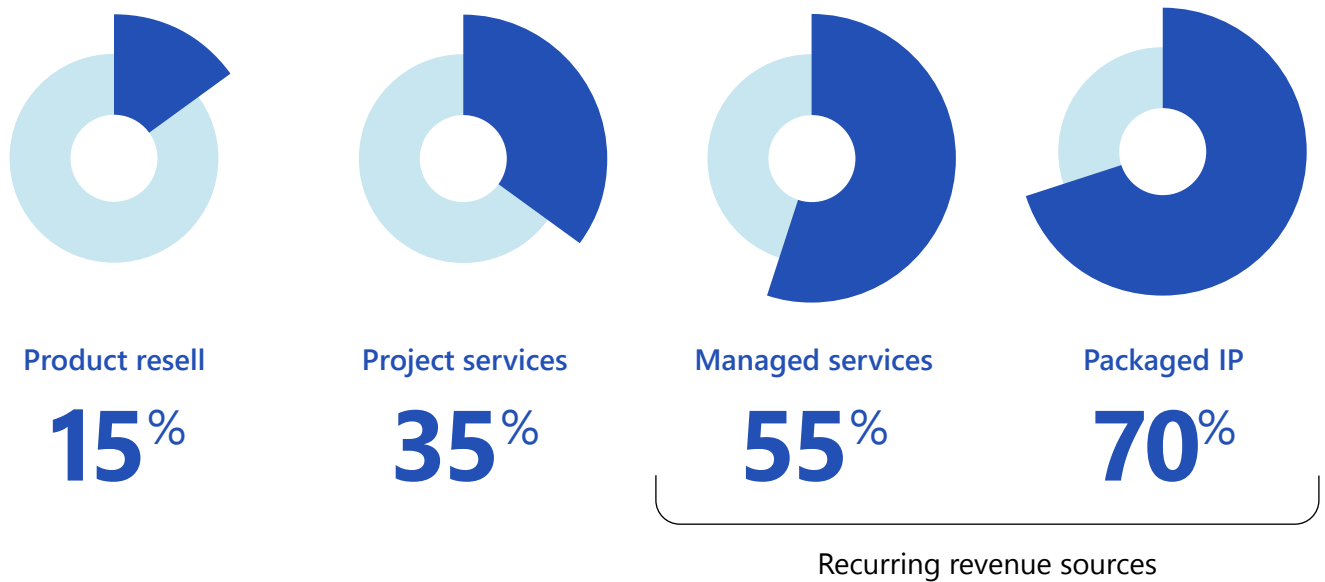


Package intellectual property to drive profitability

Partners have opportunities to develop and package the intellectual property (IP) around the ways they leverage Microsoft solutions to build unique and scalable customer offerings. This IP ranges from methods of automating business processes using Power Automate to sophisticated, industry-aligned solutions built on Microsoft's cloud services. These solutions create customer value and increase partner revenue and customer stickiness.

Packaging this IP makes it possible to build a solution once and apply it to other use cases or other customers as a recurring revenue source. Having done the hard work of architecting the solution and distilling its essence, you can reapply it elsewhere much faster and at lower cost.

Figure 8: Profit margins from different revenue streams.



Leverage Microsoft's partner ecosystem and app marketplace

Being part of the Microsoft partner ecosystem gives you the opportunity to work with other Microsoft partners who have the platforms, services and technical expertise to help you deliver complex solutions, reduce your overheads and expand your offerings.

Our global network of qualified indirect providers can help you get your unique cloud solution to market faster. Indirect providers can take care of customer billing and support, allowing you to focus on building your reseller business.

There are thousands of Microsoft-fuelled apps on the Microsoft app marketplace. Partners can support customers' end-to-end needs by plugging in apps to compliment their Microsoft platform. This will create a seamless and secure experience for customers.

Unlock digital-first SaaS, ISV customers

The largest customer opportunity by TAM is start-ups and digital-first businesses, many of which are independent software vendors (ISVs) operating under the software-as-a-service (SaaS) model. An average SaaS startup's (up to 100 employees) cloud spend is a staggering \$1.16m annually, growing to \$4.87m (up to 1000 employees). ISVs are prioritising Services Partners to help them modernise and build the next generation of intelligent solutions, making them one of the fastest growing segments.

Together we can achieve more

We hope this paper has given you a better understanding of the SMB market and the significant opportunities that exist to help empower SMBs to achieve more by leveraging the Microsoft platform.

“Microsoft is a partner-led business, and we are grateful for your ongoing partnership. We invite you to think about the needs of SMBs in Australia and New Zealand and how you’re set up to serve them. I’m confident you’ll be able to pick a range of opportunity areas outlined in this paper to meet those needs and grow your business now and in the future.”

Vanessa Sorenson
Chief Partner Officer ANZ and Managing
Director Microsoft New Zealand

Appendix A:

About the research



Microsoft commissioned Capitalis to conduct research for this paper in the first quarter of 2022.

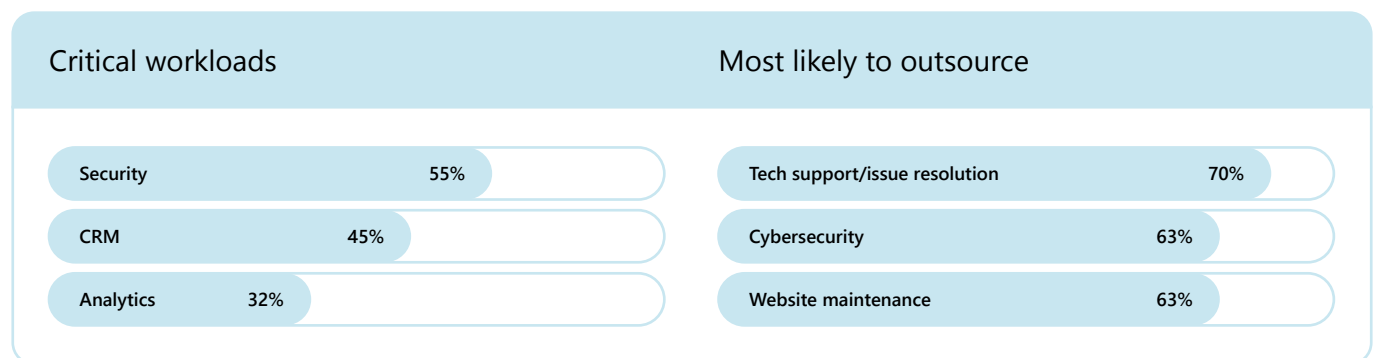
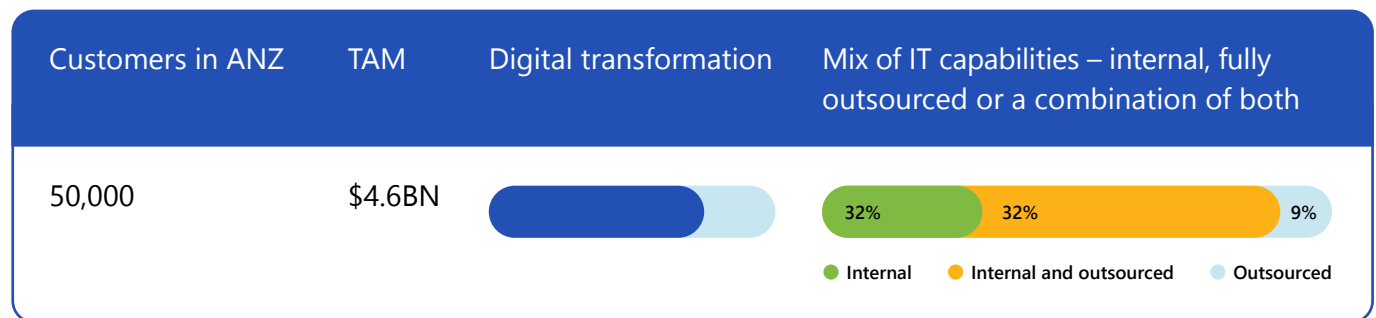
We surveyed 308 SMBs in Australia and New Zealand, including a mix of current Microsoft customers and those relying on other vendors. We asked them about:

- their current and planned technology use
- which technology vendors they used and which they trusted
- their mix of in-house and outsourced technology services
- their business priorities
- their expectations of technology vendors.

We also conducted in-depth qualitative interviews with 27 SMBs in Australia and 8 in New Zealand, as well as 7 Microsoft partners in Australia and 5 in New Zealand. These interviews provided depth and colour to the statistical analysis.

Appendix B: SMB segments in detail

Digital-first startups

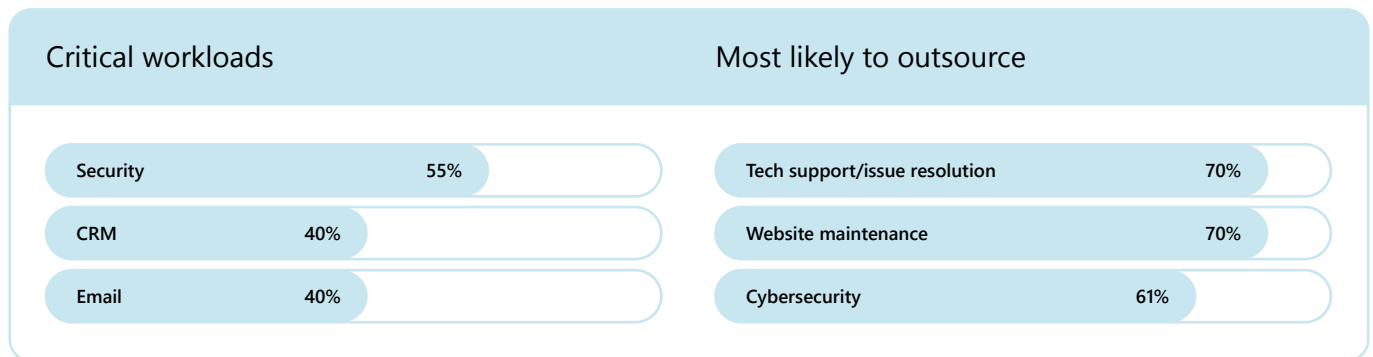
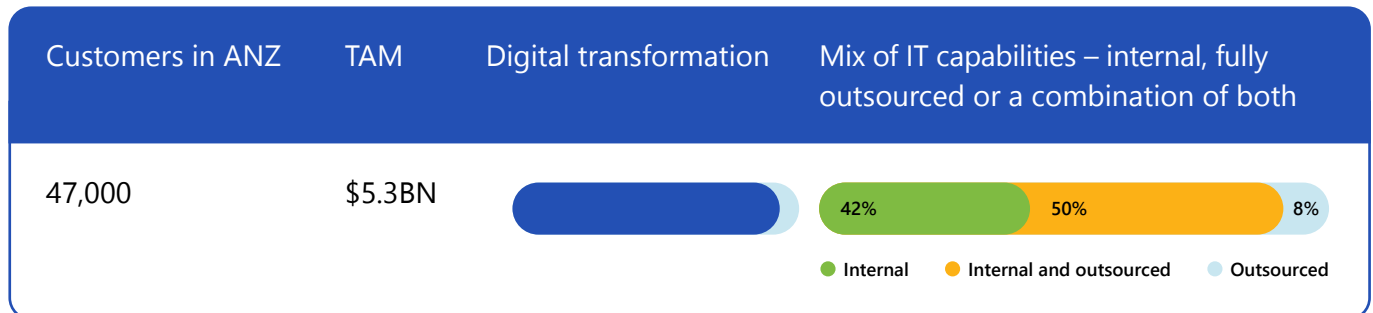


Digital-first startups that have been in business for less than seven years are often innovative and tech-savvy, with a desire for high growth and venture capital investment. Their business drivers include cost, business growth with agility, growing the value of their IP and investing in technology for innovation.

A company of this kind is already a long way into its digital transformation journey. They may have already transformed many business functions and have plans to continue along that path. Their straightforward, rapid approach to technology decisions will make the digital transformation process about as easy as it gets.

Likely investments in next 1–2 years	Key Microsoft solution areas
<ul style="list-style-type: none">• Analytics• Marketing automation• Security	<ul style="list-style-type: none">• Microsoft 365 Business Premium (with an emphasis on Teams)• Microsoft Defender for Business• Microsoft Dynamics 365• Microsoft Power BI• Microsoft Azure

Established digital-first businesses

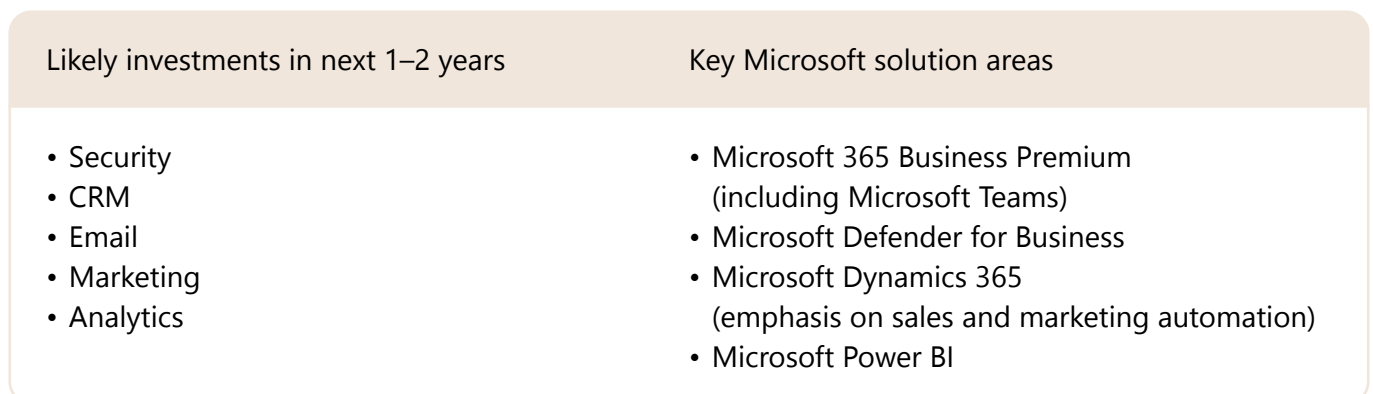


Digital-first SMBs that have been around for more than seven years seek to continue growing and scaling their business, for example by selling globally or offering new products or services. They seek to acquire new customers, improve profitability, save time, and optimise their business processes.

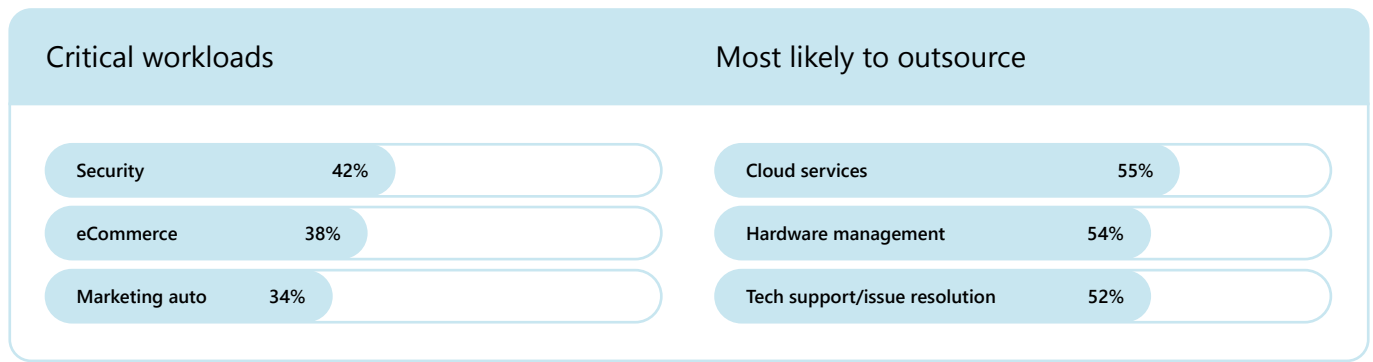
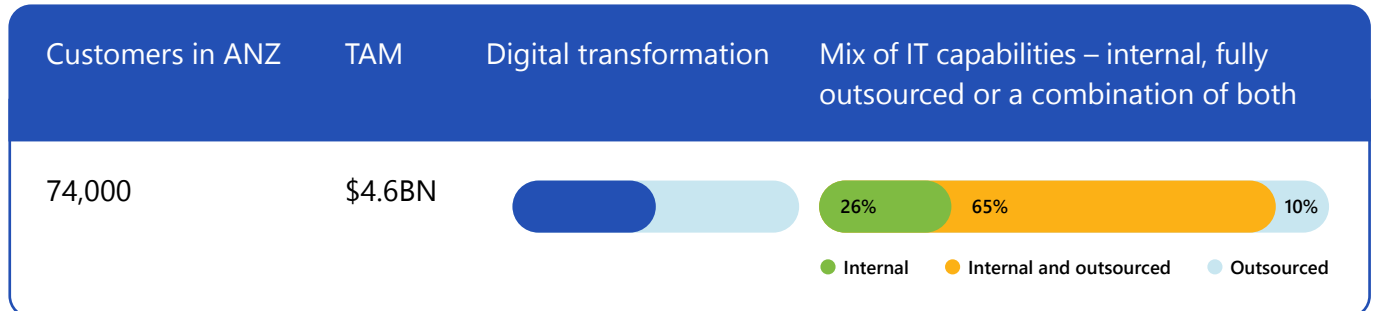
They tend to use point solutions from multiple technology vendors, with a focus on optimising their customer and employee experiences.

These SMBs have digitally transformed many aspects of their business already but are always looking to capitalise on new transformation opportunities.

However, their decision-making processes are more complex than those of younger companies, involving stakeholders from the leadership team, IT, finance, human resources and marketing. This still leads to a relatively easy technology transformation process compared to those of less digitally mature businesses.



Businesses with increasing digital maturity



These types of SMBs are often established bricks-and-mortar businesses that want to digitise part of their operations to increase reach and scale, and find new growth opportunities. Typically, their business drivers are growing revenue and cutting costs to improve profit margins.

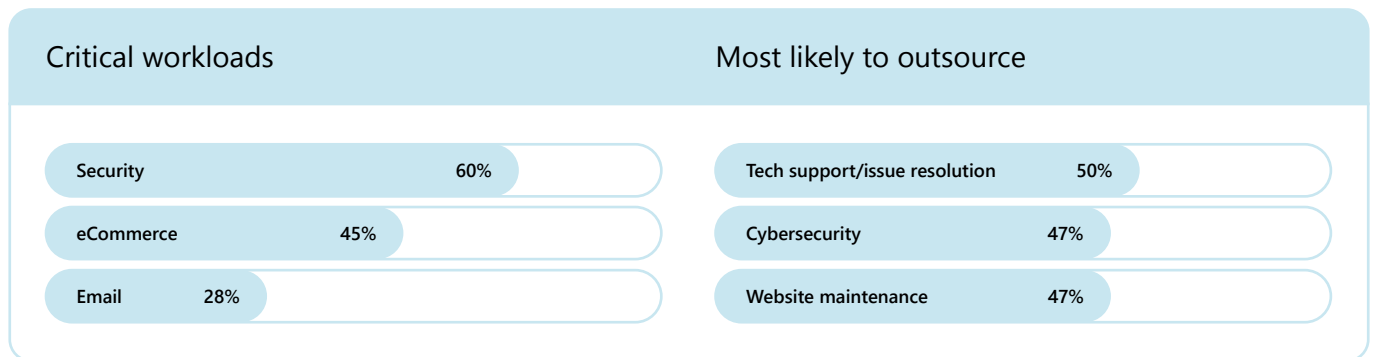
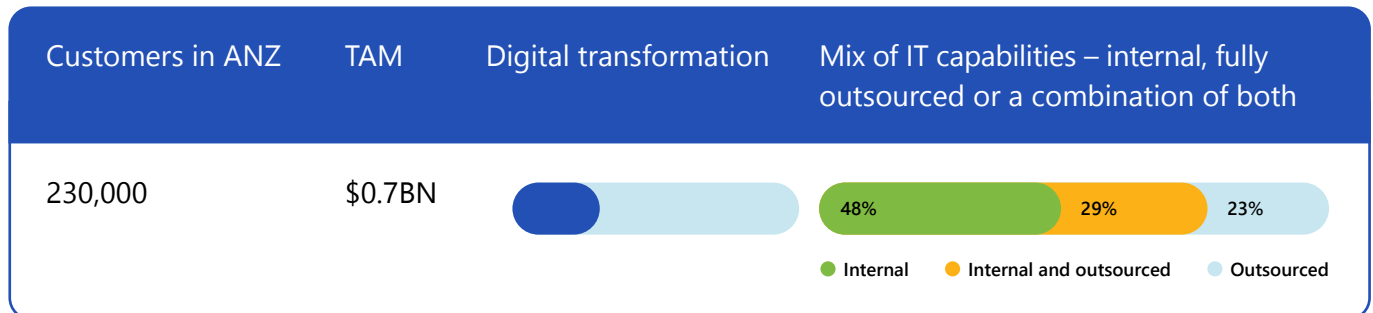
These SMBs have often digitally transformed some parts of the business already and are actively investigating how to digitise other functions.

However, their decision-making processes tend to be complex, involving owners, directors, the leadership team, multiple IT decision makers, finance, legal and human resources.

Having likely achieved some quick wins already, these SMBs will provide a challenge for you to help them with digital transformation. However, this segment still presents a large addressable market.

Likely investments in next 1–2 years	Key Microsoft solution areas
<ul style="list-style-type: none"> Hybrid work Inventory management Security Marketing automation 	<ul style="list-style-type: none"> Microsoft 365 Business Premium Microsoft Dynamics 365 (emphasis on marketing automation) Microsoft Defender for Business Microsoft Surface

Low-tech startups



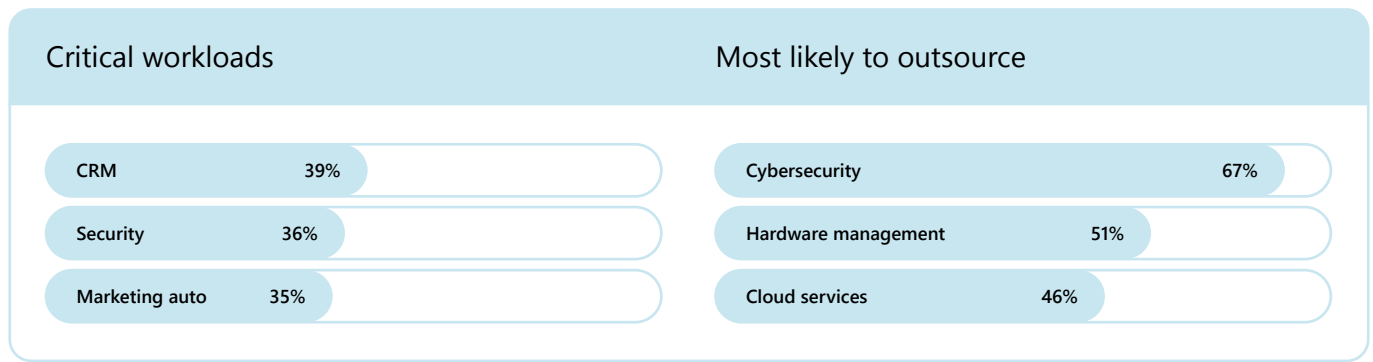
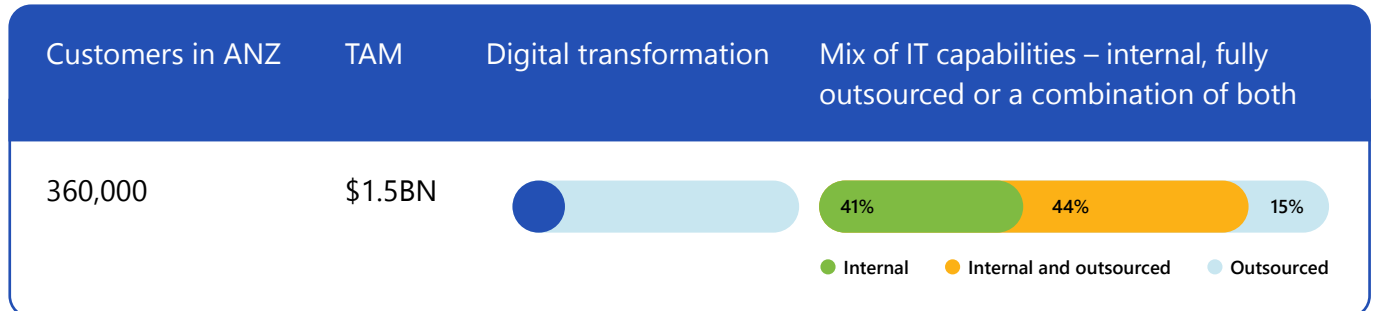
These less mature SMBs are likely to be entrepreneurs or self-starters with fewer than 20 employees. They typically work in areas such as services, consulting and small-scale retail. Their drivers for investing in digital transformation include avoiding business disruption and increasing business value. They may have been forced into technology adoption by changing regulations or market conditions.

This segment of SMBs is least likely to view technology as critical to business. They may be interested in digital transformation but don't know where to start.

Even though their decision-making process only involves a single owner or small leadership team, these SMBs present a challenge for partners seeking to help them with technology transformation.

Likely investments in next 1–2 years	Key Microsoft solution areas
<ul style="list-style-type: none"> Security Inventory management Analytics 	<ul style="list-style-type: none"> Microsoft 365 Business Premium Microsoft Power BI Microsoft Dynamics 365 Business Central

Established low-tech businesses



These SMBs have been in business for more than seven years and are happy to maintain their market position or grow steadily. These are technology laggards that want exceptional value from their IT products and services.

They tend to have basic technology skills combined with complex decision-making processes involving owners, directors, leadership teams, IT managers or IT teams, finance managers, incumbent technology partners, and business line managers.

Likely investments in next 1–2 years	Key Microsoft solution areas
<ul style="list-style-type: none"> Hybrid work Inventory management Security Marketing automation 	<ul style="list-style-type: none"> Microsoft 365 Business Premium Microsoft Dynamics 365 (emphasis on marketing automation) Microsoft Defender for Business Microsoft Surface

