

## The Future of Human Resources: Analytics software companies have importance in the post-pandemic world, but barriers to uptake remain

### MarketLine Case Study

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# 1. Overview

## 1.1. Catalyst

The COVID-19 pandemic has accelerated a number of profound changes that have been brewing in the world of work in recent years, including technological transformation, the transition to more flexible working patterns, and the embrace of diversity, inclusion, and sustainability objectives. This has created an increasingly complex landscape through which employees and leaders alike must navigate, meaning that the human resource (HR) function has evolved from a primarily administrative role to one which lies at the heart of strategic business development and employee engagement. In response, many HR departments have sought the services of designated HR and workforce software analytics companies, which collect, organize, and analyze vast amounts of data to highlight trends and patterns within a given company. This can then be acted upon to improve productivity, employee satisfaction, and operational efficiency. Amid strong demand, HR and workforce analytics software companies have experienced a surge in growth and investment over the past couple of years. However, this case study proposes that several barriers to the use of analytics software in HR remain, namely an incongruence in data analysis and application, and issues pertaining to data privacy. Finding a solution to these problems is imperative if the use of analytics is to truly revolutionize the world of work.

## 1.2. Summary

Factors such as digital innovation and the COVID-19 pandemic have accelerated changes that were already well underway in the world of work, creating a more complex and diverse landscape than ever before. As a result, the services delivered by HR and workforce analytics software companies have become highly sought after, enabling businesses to adapt to evolving trends and thrive in this new working environment. This is further reflected by the significant investment such companies have received in recent years.

Major multinational technology giants such as Google, Microsoft, and IBM have been at the forefront of the HR and workforce analytics software trend, harnessing their extensive capabilities and expertise to attract clients. However, smaller providers and start-ups are acting as an increasingly disruptive force as demand for analytics software grows. This has created a highly competitive operating environment.

Moreover, as the initial impact of the pandemic begins to ease and companies maneuver a gradual return to the workplace, new challenges are emerging. It is predicted that demand for HR and workforce analytics software will remain on an upward trajectory in a post-pandemic world of work as employers contend with new trends such as hybrid working, the 'Great Resignation', and the ever-increasing importance of Diversity, Equity, and Inclusion outcomes.

Nevertheless, some critics have raised concerns regarding the current use of analytics software, which act as barriers to future growth in the market. Key issues highlighted relate to a dissonance between data production and application, and the degree of privacy required when collecting personal data. By taking the time to collaborate with employees and other stakeholders, HR departments will be able to better identify any concerns and areas for improvement pertaining to the use of workforce analytics software. This should help to overcome any existing hurdles and contribute to its long-term use in the world of work.

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## 2. Analytics has become an increasingly important trend in business, leading to rapid growth in the HR and workforce analytics software market

Factors such as digital innovation and the COVID-19 pandemic have accelerated changes that were already well underway in the world of work, creating an increasingly complex landscape through which employers must navigate. As a result, the services delivered by HR and workforce analytics software companies have become highly sought after, enabling businesses to adapt to evolving trends and thrive in this new working environment.

### 2.1. The function of human resources has undergone a fundamental transformation in recent years

Human resources (HR) refers to the division of a business or organization that is responsible for overseeing matters such as recruitment, payroll, absence, employment policies, compensation, and employee concerns. The majority of companies now have some form of HR department in place; however, the role of HR has evolved significantly over the past decade, with different organizations adapting to this change with varying degrees of success. Historically, HR has been primarily relegated to the realm of administrative activities concerned with personnel management, but today the responsibilities of a HR officer are considered to be far more nuanced. This shift has been driven by broader social, cultural, and economic changes in the world of work.

Most recently, the COVID-19 pandemic, which first emerged in late 2019 and has continued to impact daily life ever since, has generated unprecedented challenges for HR, as HR officers (HROs) have had to rapidly adopt a more strategic organizational focus in order to support businesses and employees in the face of widespread layoffs, furlough schemes, remote working, tightened budgets, and high levels of uncertainty. According to KPMG's 2020 Future of HR survey, which collected data from over 1,300 HR executives globally, three in five HR leaders stated that the HR function needed to rapidly modernize its approach to understanding and planning for the future needs of the workforce in order to avoid becoming irrelevant. This indicates that the expectations and requirements of the HR function have become irreversibly complex due to the pandemic, necessitating a shift in the way such departments operate.

#### 2.1.1. The use of analytics has become increasingly integral to the HR function

A key trend that has emerged amid an evolving HR landscape is that of HR and workforce analytics. While these concepts are not new, having previously been applied in the realms of marketing, finance, and production, they have gained a newfound resonance amongst leaders and industry professionals in the HR domain as companies seek to generate value and strengthen their operations in an ever-more precarious business climate. The HR Research Institute broadly defines analytics as 'the process of collecting and analyzing people-related data for the purpose of producing insights and improving decision making. It generally includes the use of statistical methodologies, technologies, and expertise...and it may include the analysis of both big data and smaller data sets'. Analytics has a range of applications, with the most commonly cited being compensation, recruitment and selection, and employee engagement. HR analytics tends to focus on the functioning of the HR team itself, whereas workforce analytics looks to the whole company, and these terms are also often replaced by people or talent analytics. Overall, though, analytics has become a useful tool for generating insights and painting a comprehensive picture of a company's operations, as well as identifying where any potential improvements can be made.

The growing relevance of analytics is reflected in research documenting its uptake among companies. For instance, the Insight222 People Analytics Trends survey of over 100 global business leaders indicates that six in every ten companies grew their analytics team in the twelve months to June 2021, with each individual analytics team having one designated analytics professional per 2,900 employees (up from one in every 4,000 in the twelve months prior). Similarly, the HR Institute found that 82% of respondents surveyed as part of its Future of HR Function 2021 report believed that leveraging HR analytics was important or essential for their business. This demonstrates the high priority placed on analytics in supporting strategic company growth, as well as its future potential.

### 2.1.2. The advent of Big Data has supported the application of analytics to the workplace

The emerging trend of analytics in the workplace has been bolstered by the rapid proliferation of advanced technology in recent years. In particular, Big Data (that is, extremely large data sets generated and made available through digital channels) has had a transformative impact on HR and the wider workforce due to its potential to supply huge amounts of information on a given topic at the click of a button, and with little cost. According to the HR Research Institute, over half of the HR executives surveyed as part of its 2020 report, The State of Today's HR Tech Stack, believed that use of technology can improve HR productivity and efficiency, as well as the overall employee experience. This indicates the benefits of using new technology to enhance business operations and gain an advantage over competitors. Nevertheless, one of the biggest challenges for businesses is how to collate and apply the vast amount of data generated to suit its unique needs and generate the most productive outcomes, identifying a gap in the market in which distinct HR and workforce analytics software companies can thrive.

## 2.2. HR and workforce analytics software companies have experienced strong investment as demand for services has grown

In order to effectively collect and analyze the vast amounts of data that new technology has the potential to harness from businesses and employees, many HR divisions are now turning to specific HR and workforce analytics software companies for support. Generally, HR and workforce analytics software companies undertake the task of generating data themselves via digital tools, the findings of which are then fed back to industry professionals to strategically inform future business decisions in areas such as planning, productivity, management, recruitment, and finance. Some more advanced analytics software companies may also offer recommendations based upon trends and patterns in the data. There are a number of companies operating in this field, ranging from established names in tech, such as Google, Microsoft, IBM, and Oracle, to smaller start-ups. One example of the latter is eqtble, Inc., an online software platform launched in 2020 that works alongside more than 150 HR and human capital management systems to synthesize workplace data on topics such as Diversity, Equity, and Inclusion (DEI), goal setting, and attrition reduction.

Strong demand for HR and workforce analytics software is reflected by the significant investment such companies have received in recent years. For instance, in October 2021, SkyHive Technologies, a software-as-a-service (SaaS) platform delivering workforce planning and labor market development guidance secured \$40m in a series B funding round, bringing the company's total funding to \$48m. Similarly, a report by Insight222 conducted in 2021 indicates that of the 114 companies that it surveyed, all but one planned to expand its investment in analytics over the next eighteen to 24 months. These findings are even more significant given the wider contraction of the global economy during the COVID-19 pandemic, which has placed immense budgetary constraints on many businesses. As such, it appears that the services of software analytics platforms are becoming increasingly integral to the future of the HR function, in a move to what multinational technology corporation, IBM, describes as 'HR 3.0'.

## 2.2.1. Big tech companies are leading the way in the HR and workforce software analytics market

Major multinational technology giants have been at the forefront of the HR and workforce analytics software trend, harnessing their extensive capabilities and expertise to attract clients. One such example is Google, which has been experimenting with workforce (or what the company describes as 'people') analytics as early as 2008 through its 'Project Oxygen' initiative. Project Oxygen sought to generate an analysis of the leadership traits of managers, identifying the most important and productive qualities through qualitative interviews and surveys with employees, which were then coded and ranked. The findings were then used as a basis to inform future management hiring decisions, as well as to support internal training and development programs. Since this early foray into the use of analytics to enhance business outcomes, Google has further expanded its capabilities and offers advice and guidance to other businesses and industry professionals under its re:Work platform.

IBM is another example of a multinational technology company with a strong analytics offering, which is deployed by its artificial intelligence (AI) powered 'Watson' suite. The company describes Watson as a 'portfolio of enterprise-ready, pre-built applications and tools designed to reduce the costs and hurdles of AI adoption through industry-leading natural language processing, automation, and trust in our responsible use of AI'. In terms of the workplace, IBM delivers Watson Talent Insights, which aims to guide businesses through a range of HR-related challenges using analytics and pre-determined research questions. Some of the key features of Watson Talent Insights include the collation of internal and externally generated data, pattern analysis, and an easy-to-use sharing platform to disseminate research findings. The significant success of IBM's platform is demonstrated in the fact that the overall Watson suite has increased its number of client engagements to 40,000 across twenty industries in 2021.

Figure 1: GlobalData's top ten global software companies, ranked according to leadership across ten key industry themes

| Application Software<br>(45 Companies) |                     |          |         | Thematic Screen            |          |            |               |                       |     |                 |                           |          |                   |                     |  |  |
|----------------------------------------|---------------------|----------|---------|----------------------------|----------|------------|---------------|-----------------------|-----|-----------------|---------------------------|----------|-------------------|---------------------|--|--|
| Weightings:                            |                     |          |         | 15%                        | 15%      | 5%         | 10%           | 10%                   | 5%  | 10%             | 10%                       | 10%      | 10%               | 10%                 |  |  |
| Company                                | Mkt Cap<br>(US\$ M) | Ticker   | Country | Artificial<br>Intelligence | Big Data | Blockchain | Cybersecurity | Internet<br>Of Things | ESG | Hybrid<br>Cloud | Multi-Cloud<br>Management | COVID-19 | Future Of<br>Work | Thematic<br>Ranking |  |  |
| Microsoft                              | 2,349,968           | MSFT     | USA     | 5                          | 4        | 5          | 4             | 4                     | 5   | 4               | 4                         | 4        | 5                 | 1                   |  |  |
| Alphabet                               | 1,964,973           | GOOGL    | USA     | 5                          | 5        | 4          | 4             | 4                     | 3   | 4               | 4                         | 4        | 5                 | 2                   |  |  |
| IBM                                    | 123,085             | IBM      | USA     | 5                          | 5        | 5          | 4             | 4                     | 4   | 5               | 4                         | 3        | 4                 | 3                   |  |  |
| Amazon                                 | 1,527,655           | AMZN     | USA     | 5                          | 5        | 4          | 4             | 5                     | 1   | 3               | 4                         | 4        | 5                 | 4                   |  |  |
| Splunk                                 | 19,181              | SPLK     | USA     | 4                          | 5        | 3          | 5             | 5                     | 3   | 5               | 4                         | 3        | 3                 | 5                   |  |  |
| Apple                                  | 2,869,611           | AAPL     | USA     | 5                          | 4        | 3          | 4             | 5                     | 2   | 3               | 4                         | 4        | 4                 | 6                   |  |  |
| Salesforce                             | 221,634             | CRM      | USA     | 4                          | 5        | 4          | 3             | 4                     | 5   | 3               | 3                         | 4        | 4                 | 7                   |  |  |
| Baidu                                  | 55,087              | BIDU     | China   | 5                          | 5        | 4          | 3             | 4                     | 1   | 4               | 3                         | 3        | 4                 | 8                   |  |  |
| Oracle                                 | 225,529             | ORCL     | USA     | 4                          | 5        | 4          | 4             | 3                     | 3   | 4               | 3                         | 3        | 4                 | 9                   |  |  |
| Cloudera                               | Unlisted            | Unlisted | USA     | 4                          | 5        | 2          | 4             | 4                     | 3   | 4               | 3                         | 2        | 4                 | 10                  |  |  |

Source: GlobalData

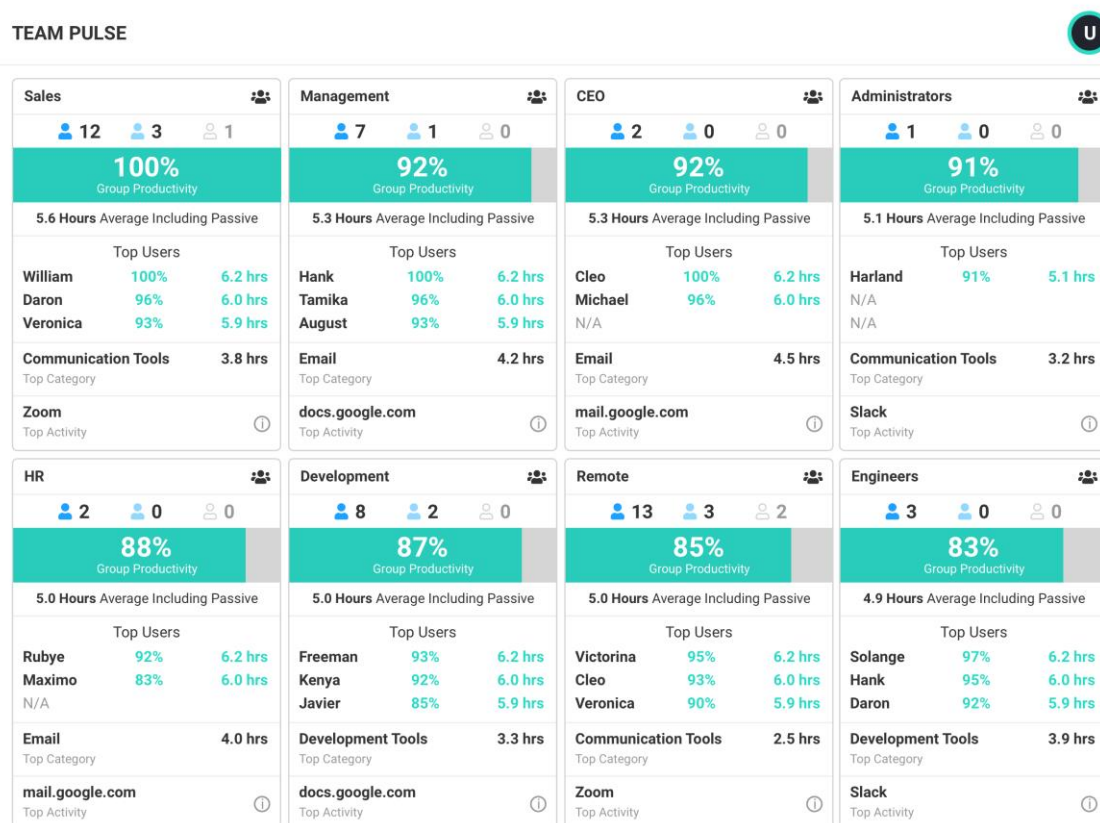
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## 2.2.2. Smaller companies are beginning to disrupt the stronghold of big tech on the market, intensifying competition

While large global technology companies have experienced strong success amid rising demand for HR and workforce analytics software, comparatively smaller providers and start-up companies are acting as an increasingly disruptive force. For instance, ActivTrak, Inc., a workforce productivity and analytics software company that aims to deliver insights for the

'modern workplace' experienced record growth in 2020 as companies around the world adapted to a new way of working during the COVID-19 pandemic. The company reported year-on-year revenue growth of 140% and increased its customer base to 8,500. It also grew its partner program by 325% across all categories of solution providers, distributors, and managed service providers and received a number of awards, including the Deloitte Technology Fast 500 award, PC Mag Editors' Choice award, and Brandon Hall Group Silver Medal for Excellence in Technology. The expansion of both less established and major analytics software providers in the past couple of years suggests that competition is heating up at all ends of the market.

Figure 2: An example of ActivTrak's productivity monitoring platform



Source: ActivTrak

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### 2.2.3. Partnerships are helping analytics software companies stand out in an increasingly saturated market

As demand for analytics software in the workplace has grown rapidly, the market has seen an influx of companies offering services in this field. This has inevitably led to an increasingly overcrowded market, making it more difficult for less well-

known names to stand out and attract clients. ActivTrak has overcome this by engaging in a number of lucrative partnerships in recent years to extend its product offering and gain a competitive edge over its peers. For instance, in December 2021, the company joined the Google Cloud Partner Advantage program, which will enable Google Cloud customers to purchase ActivTrak's products directly on the Google Cloud Marketplace. This should extend ActivTrak's product reach and expand its customer base. Moreover, in January 2022, ActivTrak announced that it plans to work alongside Salesforce, a Customer Relationship Management (CRM) software provider, to integrate its workforce productivity data capabilities with Salesforce's metrics to increase sales. Ultimately, by aligning itself with highly reputable brands, whilst simultaneously harnessing their skills and expertise, ActivTrak is able enhance its product and service offering and bolster its overall growth.

### 3. The COVID-19 pandemic has drastically altered the world of work, suggesting demand for analytics software is here to stay

As highlighted in this case study so far, analytics software companies have benefitted from a surge in growth during the early stages of the pandemic, as HR departments have been forced to navigate complex changes such as working from home, lay-offs, furlough, and employee mental health. However, as the initial impact of the pandemic begins to lift and companies maneuver a gradual return to the workplace, new challenges are emerging. It is predicted that demand for HR and workforce analytics software will remain on an upward trajectory in a post-pandemic world of work.

#### 3.1. Workforce analytics software has the potential to support a more flexible working pattern in the long-term

While some businesses had already begun to explore a more flexible approach to work prior to the pandemic, nationwide lockdown measures and social distancing restrictions have caused wholly or partially working from home to become the new norm for many. Employees have seen a number of benefits as a result of this, such as greater work-life balance, reduced time and expenditure on commuting, and improved flexibility in working hours. As a result, many are now demanding a hybrid approach to working in the long-term, with the option to work from home, a café, or co-working space on some days and in the office on others. According to GlobalData research, 48% of employees stated that they want a hybrid working model upon returning to work, compared to 30% who want to return to the office full-time and 22% who want to work from home permanently. Many companies are responding to this demand, with Twitter announcing that staff will be allowed to work from home if they choose and Facebook suggesting that around half of its workforce will have the option to work remotely in the next five to ten years.

However, as working patterns appear set to become ever-more flexible and individualized, the role of HR becomes undoubtedly more complex. In a hybrid scenario, it is more difficult for HROs to check-in on employees' wellbeing and job satisfaction, as well as monitor productivity and engagement. Some employees may also be more reluctant to report issues or seek help virtually as opposed to face-to-face. Workforce analytics software attempts to bridge this gap and overcome such issues, demonstrating its long-term potential. For instance, SaaS-based IT operations and analytics company, Scalable Software, has launched the Acumen platform which tracks employee usage of a company's systems and technology investments to identify whether they are being used correctly and if any employees are struggling to adapt to the changes. Similarly, ActivTrak platform allows HROs to track data across four key features (employee engagement and experience, benchmarks and goals, technology usage, and personal skill development) to identify any areas for improvement as employees spend more time out of the office.

#### 3.2. Analytics software can help to identify talented candidates in an increasingly competitive labor market

As initial economic uncertainty and job insecurity resulting from the pandemic has started to ease, many businesses have seen a significant increase in the number of people changing jobs. The pandemic has caused many employees to re-evaluate their lives at both a work and non-work level, leading to what is being described as the 'great resignation' or a 'turnover tsunami'. A survey conducted by UK-based recruitment company Randstrand in 2021 found that 69% of respondents felt confident about moving into a new job role in the next few months, with 24% planning a change in the next three to six months. This was well above the annual average of 11% typically expected by the company. Similarly, the US Department of

Labor reported a record number of four million resignations in the US in April 2021 alone. This highlights a strong role for analytics software companies, which are able to harness data to rapidly review job applications to attract and retain talented new candidates in an increasingly competitive climate.

### 3.2.1. Companies can use analytics software to improve DEI outcomes and attract new employees

DEI has gained strong resonance in the business world over the past decade as organizations seek to foster an accepting workforce that capitalizes on employees' unique skills and talents to boost productivity and innovation. Issues such as race and gender inequality have become ever-more visible in recent years due to widespread social protest movements, such as Black Lives Matter in 2020. Companies that are able to demonstrate inclusivity and sensitivity to these pressing social and political issues are more likely to attract employees (particularly from the millennial and post-millennial generation), meaning that from a business perspective aligning with DEI objectives has become more important than ever during the current resignation trend. Given that workforce analytics software is able to collect a range of data on the make-up of an organization and its employees, it has the potential to identify where companies lag behind in terms of inclusion on factors such as age, gender, religion, and race. These findings can then be used by HR departments to develop strategies to build a more diverse and sustainable workforce.

Table 1: Global software market value forecast: \$ billion, 2021-25

| Year | \$ billion | € billion | % Growth |
|------|------------|-----------|----------|
| 2021 | 606.8      | 532.1     | 4.5%     |
| 2022 | 646.8      | 567.1     | 6.6%     |
| 2023 | 701.9      | 615.5     | 8.5%     |
| 2024 | 770.7      | 675.8     | 9.8%     |
| 2025 | 830.5      | 728.2     | 7.8%     |

Source: MarketLine

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## 4. Despite the evident success of HR and workforce analytics software in recent years, there are some barriers to its continued success

Although it is clear that the uptake of HR and workforce analytics software has increased exponentially over the past couple of years, driven by rapid digital innovation and changes to the modern world of work during the pandemic, some critics argue that several barriers must be overcome before the use of analytics software will have a truly transformative impact on the workplace. The key issues highlighted are a dissonance between data production and application, and the degree of privacy required when collecting personal data.

### 4.1. There is an incongruency between data analysis and real-time application

The capability of HR and workforce analytics software companies to collect and organize vast amounts of data has been highly useful in enabling industry professionals to track trends and patterns pertaining to employees and wider business operations. However, it has been suggested that there is a disconnect between the accumulation of such data and how it is then applied to make productive improvements to business functioning. For instance, a study conducted by the HR Research Institute in 2021 found that only 29% of HR executives surveyed stated that they were good or very good at implementing positive changes based on analytics, while just 36% reported that their current analytics platform delivered actionable insights. Another report conducted by PwC in the same year found that 82% of HR personnel struggle to deliver actionable insights based on data findings. A critical stance of these figures suggests that the benefits of HR and workforce analytics software for companies are somewhat limited, indicating that analytics may in fact be just another business fad. However, a more productive interpretation can be taken, with the view that analytics software providers could differentiate themselves in the future by integrating a specific actionable recommendation function or delivering training tools to support HR departments in translating insight into action. This would strengthen their appeal and attract clients in an increasingly competitive market.

### 4.2. The use of Big Data raises issues concerning ethics and privacy

HR and workforce analytics is reliant on the harnessing of a wealth of personal data to identify trends in the workplace. This could range from internet browsing histories to electronic calendars, email and phone records, recordings of interactions with clients, as well as usage of certain online systems or tools. This inevitably raises questions of ethics and privacy, particularly in relation to the degree of access to personal data that employers are entitled to. Regulations regarding data monitoring vary globally, with some regions tending to favor the employer more than others. For instance, in the US, collecting personal data from employees is generally regarded as acceptable as long as the employer is able to prove legitimate and non-discriminatory motivations. In contrast, the recent General Data Protection Regulation implemented in the European Union provides employees with greater rights and protection.

The Chartered Institute of Personnel and Development suggests that analytics software companies, as well as HR departments themselves, can ease concerns regarding data privacy by being wholly transparent about what data is being collected and why. It also recommends working alongside employees to ensure that the data being collected is both relevant

and necessary. Some analytics software companies have already begun making progress in this area, with ActivTrak claiming to 'provide solutions that enhance visibility and productivity using an ethical approach that is focused on transparency and collaboration' and avoiding intrusive technologies such as keystroke logging and video surveillance. By taking the time to collaborate with employees and other stakeholders, HR departments will be able to better identify any concerns and areas for improvement pertaining to the use of workforce analytics software. This should help to overcome any existing barriers and contribute to its long-term use in the future world of work.

## 5. *Appendix*

### 5.1. Further reading

Global Software (2021) Marketline Industry Profile

The Future of Work: COVID-19 is accelerating technological and employment changes that were underway (2020) MarketLine Case Study

Alphabet Inc (2022) MarketLine Company Profile

International Business Machines (IBM) Corporation (2022) MarketLine Company Profile

Salesforce.Com Inc (2022) MarketLine Company Profile

## 6. Ask the analyst

We hope that the data and analysis in this case study will help you make informed and imaginative business decisions. If you have any questions or further requirements, MarketLine's research team may be able to help you. The MarketLine Research team can be contacted at [ReachUs@MarketLine.com](mailto:ReachUs@MarketLine.com).

## 7. *About MarketLine*

At MarketLine, we deliver accurate, up-to-date insights on over 100,000 companies, 3,500 industries, 215 countries, and 3,000 cities as well as the latest news and financial deal information from within your market and across the globe.

Established in 1997 when the Internet was in its infancy, we recognized the need for a convenient and reliable data service to help our clients understand local and global markets and the companies operating within them.

In today's information-rich world, sifting fact from fiction to pick out what's relevant and what's up to date has become the new 'holy grail' in business information provision.

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