

# Cloud Computing - UK - 2022

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- How the already dynamic growth of cloud computing was further accelerated by the COVID-19 economic disruption and is ideally suited for further uncertainties.
- How cloud computing is emerging from its embryonic state and incorporating an ever-increasing range of services.
- How cloud offerings are equating the competitive landscape for SMEs who now have access to technologies such as AI and ML that would previously have proved prohibitively expensive.
- How cloud computing can contribute to corporate environmental initiatives.
- How the American and Chinese technology giants are competing for global positioning.

The growth of cloud computing continues to gain pace globally, with the vast majority of companies adopting hybrid and multi-cloud strategies, thereby circumnavigating early concerns of supplier lock-in. The vast majority of multi-cloud adopters have moved to a hybrid strategy (80%), with just 2% using multiple private clouds and 7% using multiple public clouds.

Cloud computing is an architecture that is ideally situated to economic vagaries, and the uncertainties created by the Ukraine conflict and the consequent inflation are making its flexibility and scalability even more attractive while actively contributing to superior cyber security and productivity.

While there are few challenges to the growth of cloud computing, individual corporate challenges continue with the most frequently identified issues including understanding app dependencies, assessing the technical feasibility of cloud computing and comparing the costs with on-premise alternatives.

One of the benefits of opting for cloud computing is that it enables cost-effective access to emerging technologies for both enterprises and SMEs alike.



“Cloud computing remains in its developing stages of adoption, but has proved a highly attractive architecture during the disruption of the pandemic and is ideally placed to address the current economic disruptions mainly caused by the fuel-based inflation resulting from the Ukraine conflict.”

– **Terry Leggett, Senior Analyst, September 2022**

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



Many of these technology developments such as AI, ML, IoT, and VR are voracious producers of further computing capacity, which effectively furthers the appeal of the architecture.

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **Market context**
- **Products covered in this Report**

### EXECUTIVE SUMMARY

- **The five-year outlook for cloud computing**  
Figure 1: Cloud outlook, 2022-27
- **The market**
- **Market size and forecast**  
Figure 2: Market size for cloud computing, 2016-26
- **Multi-cloud strategies dominate**  
Figure 3: Cloud strategies, 2022
- **SaaS leads revenues**  
Figure 4: Global public cloud service revenues, by service, 2021 (\$ billion)
- **Challenges to cloud migration continue**  
Figure 5: Cloud migration challenges, 2021 and 2022  
Figure 6: Cloud migration challenges, by size of company, 2022
- **Companies and brands**
- **A globally concentrated market**  
Figure 7: Development of the four major cloud providers' revenues, 2019-22 (\$ billion)  
Figure 8: Global market shares of IaaS public cloud services, 2019-21

### ISSUES AND INSIGHTS

- **Cloud growth drivers beyond economic conditions**  
Figure 9: Actual cloud usage compared with expectations, 2022
- **The cloud is helping sustainability**  
Figure 10: Global trends in internet traffic, data centre workloads and data centre energy use, 2010-2019

### MARKET SIZE AND PERFORMANCE

- **A market in rapid growth**  
Figure 11: Market size for cloud computing, 2016-21  
Figure 12: Cloud migration challenges, 2021 and 2022  
Figure 13: Cloud Migration challenges, by size of company, 2022

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### MARKET FORECAST

- **External disruption stimulates cloud migration**

Figure 14: Cloud outlook, 2022-27

- **Strong growth prospects irrespective of economic conditions**

Figure 15: Market forecast for cloud computing, 2021-26

- **Forecast methodology**

### MARKET SEGMENTATION

- **Hybrid approach leads market**

Figure 16: Cloud strategies, 2022

Figure 17: Hybrid cloud strategies, 2022

Figure 18: Public cloud workloads, 2022

Figure 19: Public cloud data location, 2022

- **Differences in use by size of company**

Figure 20: Public cloud workloads, by size of company, 2022

- **Public cloud spending**

Figure 21: Global public cloud service revenues, by service, 2021 (\$ billion)

Figure 22: Forecast global public cloud service revenues, by service, 2023 (\$ billion)

### MARKET DRIVERS

- **The economy**
- **Inflation is the key concern for consumers and brands...**
- **... and will weigh down the post-COVID recovery**
- **Consumer spending power will be curbed**
- **The conflict in Ukraine is hurting the UK economy in a number of ways**
- **Employment has held up better than expected**
- **Consumers' financial wellbeing has fallen from the highs of 2021...**

Figure 23: Household financial wellbeing index, 2016-2022

- **...and most people are feeling the effects of price rises**
- **The mini-budget/fiscal event of 23 September will boost higher earners' take-home pay**
- **Digitisation**
- **The key to productivity**

Figure 24: Labour productivity changes in the UK and other major economies, 2010-20

- **A post-COVID-19 improvement**

Figure 25: UK labour productivity, output per hour and per worker, Q1 2016-Q2 2022

- **Internet usage**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Global expansion**

Figure 26: Worldwide internet usage, by region, 2022  
(millions and %)

- **UK expansion**

Figure 27: UK adult internet usage, 2013–20  
Figure 28: Percentage of companies and charities with digital services, 2021

- **5G continues to roll-out**

- **The Internet of Things**

## INDUSTRY STRUCTURE

- **The UK structure**

Figure 29: Changes in the structure of the data processing, hosting and related activities industry, 2016–21  
Figure 30: Employment structure of the data processing, hosting and related activities industry, 2021

- **Global market shares**

Figure 31: Development of the major four cloud providers' revenues, 2019–22 (\$ billion)  
Figure 32: Global market shares of IaaS public cloud services, 2019–21  
Figure 33: Global turnover growth in IaaS public cloud services, by company, 2020–21 (\$ million)

## COMPANY PROFILES

- **Amazon Web Services**

- **Activity**

- **Performance**

Figure 34: Turnover development of Amazon Web Services, 2016–21  
Figure 35: Quarterly Amazon Web Services revenues, 2019–22

- **Strategy**

- **Microsoft Corporation**

- **Activity**

- **Performance**

Figure 36: Revenue development of Microsoft's Intelligent Cloud, 2016–22  
Figure 37: Quarterly revenues of Microsoft's Intelligent Cloud, 2019–22

- **Strategy**

- **Alibaba Group Holdings**

- **Activity**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **Performance**

Figure 38: Quarterly revenues of Alibaba Cloud, 2019-22

- **Strategy**

- **Google**

- **Activity**

- **Performance**

Figure 39: Quarterly revenues of Google Cloud Platform, 2019-22

- **Strategy**

- **IBM**

- **Activity**

- **Performance**

Figure 40: Segmentation of IBM revenues, 2021 (\$ million)

Figure 41: Quarterly software revenues of IBM, 2019-22

- **Strategy**

- **Oracle Corporation**

- **Activity**

- **Performance**

Figure 42: Segmentation of Oracle Corporation revenues, 2022 (\$ million)

Figure 43: Quarterly cloud revenues of Oracle Corporation, 2019-22

- **Strategy**

## APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

### APPENDIX: FORECAST METHODOLOGY

- **Market forecast and prediction intervals**

Figure 44: Market forecast for cloud computing, 2021-26

- **Market drivers and assumptions**

- **Forecast methodology**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.