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Global Office Software Market: Analysis By Type (Spreadsheet Software, Word Processing Software, Visualization Software, Presentation Software and Others), By Deployment (Cloud and On Premise), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global office software market was valued at US$24.45 billion in 2022. The market value is forecasted to grow to US$37.06 billion by 2028. The office software market is a part of software industry that includes a range of software applications designed to help individuals and organizations create, edit, manage, and share digital content. Office software market is associated with provision of suite of applications by entities (organizations, sole traders and partnerships) including database management systems, graphics software, spreadsheet applications, and word processors. Office software has two categories – basic and collaborative.

Factors such as growing working class population, rising disposable income, increasing number of businesses and startups, rising IT spending, increased demand for cloud-based software and applications, rising adoption of BYOD policy etc. are expected to drive the overall market growth in the forecasted period. Collaboration is the new trend for the office software industry. Collaborative software provides customers with overall solutions, including document editing and data sharing, storage, real-time communication, and mobile office. The market is anticipated to grow at a CAGR of approx. 7% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

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By Type: The report provides the bifurcation of the market into five segments based on type: spreadsheet software, word processing software, presentation software, visualization software and others. Spreadsheet segment holds the largest share of global office software market owing to growing use of spreadsheet software by companies for storing, organizing, and analyzing data in tabular format, escalating tendency of SMEs to use spreadsheet office software while working with various e-commerce players, wide range of applications of these software in development teams, marketing, accounting, etc., growing adoption of work from home culture and ongoing technological advancements in the IT sector.

By Deployment: The report provides the bifurcation of the market into two segments based on deployment: on premise and cloud. Cloud office software market is both the largest and fastest growing segment, owing to increased flexibility, scalability and resilience offered by cloud collaboration platforms, lower capital & operational costs, shift in consumer's preference towards subscription cloud-based office software and rise in adoption of work from home culture.

By Region: The report provides insight into the office software market based on the regions namely North America, Europe, Asia Pacific, and Rest of the World. North America office software market holds the largest share of global office software market owing to increasing internet penetration, growing SME expenditures in the SaaS and cloud industry, growing demand for cost effective, easy to use and customizable office software solutions among businesses, increasing advancements in office software solutions and rising consumer awareness about collaborative office software. The US office software market is further divided into five segments by type, namely, spreadsheet software, word processing software, presentation software, visualization software and others, where the spreadsheet segment holds the largest share.

Asia Pacific office software market in the fastest growing region of global office software market owing to rapidly expanding working class population, rising number of startups and new businesses, increasing disposable income, growing demand for automated and efficient software tools and higher emphasis of regional governments on digitalization of operations. China office software market have great potential. In recent years, China's desktop market has developed rapidly, with Microsoft and Kingsoft the two leading players but other brands such as Yozosoft and Standard Software are catching up.

Market Dynamics:

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Growth Drivers: The global office software market has been growing over the past few years, due to factors such as rising adoption of cloud computing, increasing internet penetration, growing usage of mobile devices, increasing demand for productivity tools, globalization, etc. Office software like Microsoft Office, Google Docs, Zoho Workplace, etc. are available for both iOS and Android mobile devices, allowing users to create, edit, and share documents on the go while also providing benefits such as increased mobility, convenience, improved productivity and real-time updates and notifications related to office tasks and work deadlines. So with office software for mobile devices being associated with increased accessibility, ease of installation and ongoing integration of a number of advanced functionalities such as intranet security, document management, etc., there has been an increased demand for office software applications that are specifically designed for mobile devices, such as note-taking apps and mobile scanning apps that allow users to easily create, edit, and share documents directly from their mobile devices, positivity contributing to the growth of global office software market.

Challenges: However, the market growth would be negatively impacted by various challenges such as compatibility issues, high risk of data thefts and software malfunction, etc. Companies must ensure that their software is compatible with a wide range of devices and operating systems to maximize its market appeal and reach wider consumer base as there has been instances where office software companies release ongoing updates with advanced capabilities, that are often incompatible with customer’s machine and the available devices are not equipped to handle such sophisticated software. Therefore, problems associated with file format compatibility, operating system compatibility, hardware & software compatibility, and different version compatibility will continue to hinder the growth of global office software market in the forecasted years.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as integration of artificial intelligence (AI), technological advancements, increasing demand for collaboration software, rising demand from SMEs, etc. AI in office software suites like G Suite, Microsoft Office, etc., are used to automate and personalize repetitive tasks, such as data entry, scheduling meetings, replying to emails, document processing, etc., saving time, streamlining workflows and allowing employees to focus on higher-level tasks, improving overall efficiency and productivity. So, increasing integration of AI in office software suits is expected to boost the growth of global office software market.

Impact Analysis of COVID-19 and Way Forward:

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COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. With widespread adoption of remote work and a sudden shift towards work from home culture in response to lockdown restrictions and social distancing policy imposed by governments of various countries, many businesses shifted their operations online, relying heavily on office software solutions to automate and streamline tasks while maintaining productivity and collaboration, boosting the demand for office software solutions and accelerating the growth of global office software market in 2020.

Competitive Landscape:

Office software market is consolidated with few dominant players holding a significant market share. For instance: Microsoft Office holds around 90% share of the global basic office software market. Other players include Google (G-Suite), Apple (iWork) and others. Similarly, Kingsoft's WPS Office holds around 90% share in China's mobile market, but has a limited global footprint. Although market is dominated by a few major players, there are many smaller vendors offering niche solutions and diverse innovative offerings to remain competitive in the market. The key players of the market are:

Kingsoft Corporation Limited

Microsoft Corporation

Alphabet Inc. (Google LLC)

Apple Inc.

Corel Corporation (Alludo)

The Apache Software Foundation

Nevron Software LLC

MobiSystems, Inc.

Collabora Ltd.

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Yongzhong Software Co., Ltd. (Yozosoft)

The leading players of the market are adopting various key development strategies to meet the increased demand from various industries, including increased R&D investment, strategic partnerships, mergers, acquisition & collaboration as well as developing new solutions in order to broaden and strengthen their current portfolios, while attracting new customers.

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