

2025 MARKET OPPORTUNITIES Report

Region:

United States



Market:

Advanced Analytics

Market



2025 Advanced Analytics Market-Market Opportunities Report ADV2020

United States

Table of Contents

Methodology and Notes

Market Definitions and Trends

Market Segments

Market Share of Market Segments

Products and Services Types

Market Share of Products and Services Types

Application Types

Market Share of Application Types

End Users Types

Market Share of End Users Types

Current Market Trends

Market Drivers

Market Restraints

Major Players

Market Opportunities

Market Opportunities from Gross Domestic Product Changes

Market Opportunities from GDP per Capita Changes

Market Opportunities from Population Changes

Market Opportunities from Manufacturing Sector

Market Opportunities from Research Sector

Market Opportunities from Computer Sector

Market Opportunities from Computer Programming Industry

Market Opportunities from Management Consulting Industry
Market Opportunities from Computer Systems Design Industry
Market Opportunities from Changing Inflation
Market Opportunities from Changing Interest Rates
Market Opportunities from Competitive Markets

Appendix

Methodology and Notes

Methodology

Barnes Reports' Global Market Opportunities Markets report series provide estimates of the size and characteristics of the highest growth advanced market in the largest 10 global countries. These estimates are produced by a proprietary economic model that is based on a number of sources and factors:

1. The size of global market from the executive interviews, internet search, and government statistical databases over the last five years.
2. Estimate current and forecast size of global high-tech market using regression analysis.
3. Adjust estimates and forecasts using the most current global manufacturing, service, and retail sector data and trends. This adjustment adds vertical (industry) analysis to the forementioned horizontal (trend) analysis.
4. Global estimates use trend GDP data and the ratio of manufacturing, service, and retail sectors to GDP by country from World Bank databases to compare U.S. versus global countries size and trends.

About this Report

Estimates on equipment or material sales (product shipments value) are published for six historical years and two forecast years. Product shipments include the total value of all products produced and shipped by all producers. For selected products, this can represent value of receipts, value of production, or value of work done.

These estimates product shipment values are also considered "market potentials" because the calculations assume efficient, free markets. Estimates can vary in countries with inefficient, closed markets with such issues as oppressive regulations and tariffs, black markets, and political problems impacted a regular business cycle.

Published annually, this report provides a unique and accurate estimate on market sizing for this equipment/material using a proprietary economic model that integrates historical trends (horizontal analysis) and longitudinal analysis of incorporated industries (vertical analysis).

Product shipments value are presented in US Dollars and local currency units for historical and forecast years.

Product shipments values are also broken down by related costs, such as cost of materials, cost of fuels/electricity and value added, as well as capital expenditures, such as expenditures on buildings, machinery, vehicles and computers.

Market Definitions and Trends

Market Segments

The advanced analytics market has experienced significant growth in recent years, driven by the increasing volume of data generated across various industries. Companies are leveraging advanced analytics techniques to transform raw data into actionable insights, enabling better decision-making and strategic planning. The market can be segmented based on various factors, including deployment type, organization size, industry vertical, and geographical region.

1. Deployment Type:

Advanced analytics solutions can be deployed in two primary formats: on-premises and cloud-based. On-premises solutions provide organizations with greater control over their data and analytics processes, often preferred by industries with stringent regulatory requirements, such as finance and healthcare. However, cloud-based solutions are rapidly gaining traction due to their flexibility, scalability, and cost-effectiveness. They enable organizations to access advanced analytics tools without the need for extensive IT infrastructure, making them particularly appealing to small and medium-sized enterprises (SMEs).

2. Organization Size:

The advanced analytics market can also be segmented by organization size, typically categorized into large enterprises and SMEs. Large enterprises often have the resources to invest in sophisticated analytics tools and hire specialized data science teams to leverage these technologies fully. They utilize advanced analytics for a wide range of applications, such as customer segmentation, predictive maintenance, and risk management. In contrast, SMEs are increasingly adopting advanced analytics solutions to gain a competitive edge. These organizations benefit from user-friendly, cost-effective tools that empower them to analyze data and derive insights without needing extensive technical expertise.

3. Industry Vertical:

Different industry verticals have unique needs and applications for advanced analytics, leading to further segmentation. Key sectors include:

- Retail: Retailers use advanced analytics for inventory management, customer behavior analysis, and personalized marketing strategies. Predictive analytics helps them anticipate demand and optimize supply chains.
- Healthcare: In healthcare, advanced analytics plays a crucial role in patient care optimization, treatment effectiveness analysis, and operational efficiency. Predictive models help identify at-risk patients and improve outcomes.
- Finance: Financial institutions leverage advanced analytics for fraud detection, risk assessment, and customer relationship management. Techniques such as machine learning are employed to analyze transaction patterns and detect anomalies.
- Manufacturing: In manufacturing, advanced analytics is utilized for predictive maintenance, quality control, and supply chain optimization. By analyzing machine data, manufacturers can reduce downtime and enhance productivity.
- Telecommunications: Telecommunications companies use advanced analytics for network optimization, customer churn prediction, and service personalization. Understanding customer usage patterns allows them to tailor offerings and improve retention.

4. Geographical Region:

The advanced analytics market can also be segmented geographically, with significant variations in adoption and growth across regions. North America, particularly the United States, leads the market due to the presence of major technology companies and a high level of digital transformation. Europe follows closely, with a focus on regulatory compliance and data privacy driving advanced analytics adoption. The Asia-Pacific region is witnessing rapid growth, fueled by increasing investments in technology and a surge in data generation from emerging economies.

Market Share by Market Segment

The advanced analytics market has experienced substantial growth in recent years, driven by the increasing demand for data-driven decision-making across various industries. Advanced analytics encompasses a range of techniques, including predictive analytics, prescriptive analytics, machine learning, and big data analytics. As organizations harness the power of data, understanding the market

share of different segments within this domain becomes essential for stakeholders, including businesses, investors, and policymakers.

The advanced analytics market can be segmented based on deployment type, organization size, application, and region. Each of these segments plays a crucial role in shaping the overall landscape of the market.

1. **Deployment Type:** The advanced analytics solutions are typically deployed in two main environments: on-premises and cloud-based. The cloud-based segment has been gaining significant traction due to its scalability, flexibility, and cost-effectiveness. Organizations are increasingly adopting cloud solutions to leverage advanced analytics without the heavy upfront investments associated with on-premises deployments. Market analysis indicates that the cloud segment holds a substantial share, and its growth trajectory is expected to outpace that of the on-premises segment as more businesses transition to digital platforms.

2. **Organization Size:** The advanced analytics market also segments based on the size of the organization—small and medium-sized enterprises (SMEs) versus large enterprises. While large enterprises have traditionally dominated the market due to their extensive resources and data capabilities, SMEs are rapidly catching up. The increasing availability of affordable analytics tools and platforms tailored for smaller businesses is enabling SMEs to leverage advanced analytics for competitive advantage. Consequently, the market share of SMEs in the advanced analytics domain is expected to grow significantly, contributing to overall market expansion.

3. **Application:** Advanced analytics finds applications across various sectors, including healthcare, finance, retail, manufacturing, and telecommunications. The finance and banking sector holds a considerable share of the market, primarily driven by the need for risk assessment, fraud detection, and customer insights. However, industries like healthcare are witnessing accelerated adoption as organizations seek to improve patient outcomes through predictive analytics and personalized medicine. The retail sector is also leveraging advanced analytics for customer segmentation and inventory optimization. Each application segment contributes differently to the market, with finance and healthcare currently leading, but with retail and manufacturing showing promising growth potential.

4. **Geographical Segmentation:** Geographically, North America has historically dominated the advanced analytics market, largely due to its technological advancements and the presence of key market players. However, regions like Asia-Pacific are emerging rapidly, driven by increasing digital transformation initiatives and a burgeoning startup ecosystem. Countries like China and India are investing significantly in analytics capabilities, further reshaping the market dynamics.

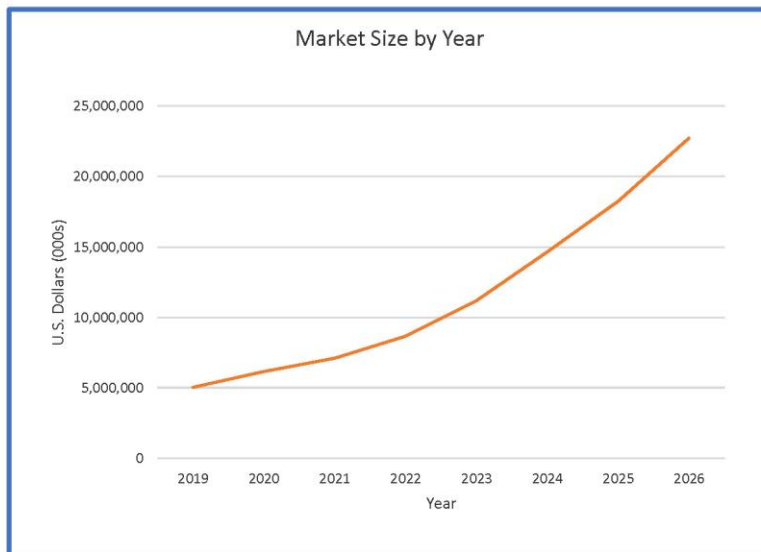
United States

Product/Service Type: Advanced Analytics Market

The market for this equipment worldwide is estimated to be \$18,261.8 million dollars in 2025 and is expected to change by 24.5 percent from 2025 to 2026.

Market Sales (000s)		
Year	US Dollars	Euros
2019	5,037,262.1	4,130,554.9
2020	6,166,418.1	6,361,739.4
2021	7,100,866.7	6,718,960.8
2022	8,672,317.4	8,030,565.9
2023	11,198,146.8	10,369,483.9
2024	14,650,484.3	13,566,348.5
2025	18,261,840.8	16,910,464.6
2026	22,735,551.5	21,053,120.7
2031	64,171,541.1	59,422,847.0
Y-to-Y Chg	US Dollars	Euros
2019-2020	22.4%	54.0%
2020-2021	15.2%	5.6%
2021-2022	22.1%	19.5%
2022-2023	29.1%	29.1%
2023-2024	30.8%	30.8%
2024-2025	24.7%	24.7%
2025-2026	24.5%	24.5%
CAGR 2026-2031	36.5%	36.5%

Source: Barnes Reports *2024-2025 Forecasts; 2026-2031 Projections



United States

Product/Service Type: Advanced Analytics Market

Operating Costs Estimates

The annual payroll for this market worldwide will be \$8,400.45 million dollars in 2025 and the lease and rental payments for the market will be \$913.09 million dollars. The operating expenses for this market is expected to reach \$13,732.90 million dollars in 2025.

2025 Operating Costs	US Dollars (000s)
Annual Payroll (\$1,000)	8,400,446.8
Operating Expenses (\$1,000)	13,732,904.3
Employer Costs for Fringe Benefits (\$1,000)	1,333,114.4
Contract Labor Costs including Temporary Help (\$1,000)	566,117.1
Cost of Insurance (\$1,000)	255,665.8
Taxes and License Fees (\$1,000)	127,832.9
Lease and Rental Payments (\$1,000)	913,092.0

Cost of Services Estimates

The cost of transportation for this market worldwide will be \$182.62 million dollars in 2025 and the cost of printing services for the market will be \$127.83 million dollars. The cost of repair and maintenance for this market is expected to reach \$91.31 million dollars in 2025.

2025 Cost of Services	US Dollars (000s)
Cost of Purchased Transportation & Warehousing (\$1,000)	182,618.4
Cost of Purchased Repair & Maintenance Svcs (\$1,000)	91,309.2
Cost of Purchased Printing Services (\$1,000)	127,832.9
Cost of Purchased Advertising & Promotional Svcs (\$1,000)	255,665.8
Cost of Purchased Legal Services (\$1,000)	146,094.7
Cost of Purchased Accounting and Auditing Svcs (\$1,000)	91,309.2

*2024-2026 Forecasts
Source: Barnes Reports

Products and Services Types

The Advanced Analytics Market has gained significant traction in recent years, driven by the increasing volume of data generated by organizations, the growing need for data-driven decision-making, and advancements in technology. This market encompasses a wide range of product and service types that cater to various analytical needs across industries. Here's a detailed look at the primary product and service types in this burgeoning market.

1. Predictive Analytics

Predictive analytics involves using statistical algorithms and machine learning techniques to identify the likelihood of future outcomes based on historical data. This product type is widely utilized across sectors such as finance, healthcare, marketing, and supply chain management. Applications include customer behavior forecasting, risk management, and operational efficiency analysis. Software solutions often integrate data mining, forecasting, and regression analysis to help organizations make informed decisions.

2. Descriptive Analytics

Descriptive analytics provides insights into past performance by analyzing historical data. This type of analytics is crucial for organizations looking to understand trends, patterns, and anomalies within their data sets. Common tools include dashboards and reporting software that visualize data metrics, allowing businesses to monitor key performance indicators (KPIs) and derive actionable insights. Descriptive analytics serves as a foundation for more advanced analytical techniques.

3. Prescriptive Analytics

Prescriptive analytics goes a step further by recommending actions based on data analysis. It utilizes a combination of predictive analytics and optimization techniques to advise organizations on the best course of action. This product type is particularly valuable in fields such as logistics, manufacturing, and finance, where decision-making is complex and multifaceted. By simulating different scenarios, prescriptive analytics helps organizations optimize operations and improve decision quality.

4. Text Analytics and Natural Language Processing (NLP)

With the exponential growth of unstructured data, text analytics and NLP have become critical components of advanced analytics. These tools analyze and extract meaningful information from textual data sources, such as social media, customer feedback, and emails. Organizations leverage these capabilities to gain insights into customer sentiments, market trends, and competitive intelligence, enhancing their ability to respond to changing market dynamics.

5. Visual Analytics

Visual analytics combines data visualization with advanced analytics techniques to help users interpret complex data sets. This product type focuses on transforming data into interactive visual formats, enabling stakeholders to explore data intuitively. It plays a vital role in business intelligence, allowing organizations to identify trends, outliers, and correlations quickly. Popular tools in this category include Tableau, Power BI, and QlikView.

6. Big Data Analytics

Big data analytics refers to the process of examining large and varied data sets—often in real-time—to uncover hidden patterns, correlations, and trends. This product type utilizes technologies like Hadoop and Spark to process vast amounts of data efficiently. Industries such as telecommunications, healthcare, and retail leverage big data analytics to enhance customer experience, improve operational efficiency, and drive innovation.

7. Cloud-based Analytics Services

With the shift towards cloud computing, many organizations are adopting cloud-based analytics services. These platforms offer flexibility, scalability, and cost-effectiveness, allowing businesses to analyze data without the need for extensive on-premises infrastructure. Leading providers, such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud, offer a suite of advanced analytics tools, including machine learning services, data warehousing, and real-time analytics solutions.

Market Share of Products and Services Types

The Advanced Analytics Market has witnessed significant growth in recent years, driven by the increasing demand for data-driven decision-making across various industries. Advanced analytics encompasses a range of techniques, including predictive analytics, prescriptive analytics, text analytics, and machine learning, among others. As organizations strive to leverage data for competitive advantage, the market share of different product and service types within this sector has evolved, reflecting both technological advancements and changing consumer needs.

1. Product Types:

In the realm of advanced analytics, several product types dominate the market. Software solutions, which include platforms for data mining, statistical analysis, and machine learning, hold a substantial share. These tools allow businesses to analyze vast datasets quickly and derive actionable insights. Leading players like SAS, IBM, and SAP have established a strong foothold in this area, offering comprehensive analytics solutions that cater to various industries, including finance, healthcare, and retail.

Cloud-based analytics solutions are rapidly gaining traction, accounting for a growing portion of the market share. The shift to cloud computing has enabled organizations to access advanced analytics tools without significant upfront investments in infrastructure. This trend has been particularly beneficial for small to medium-sized enterprises (SMEs), which can now leverage sophisticated analytics capabilities to enhance their operations. Companies like Microsoft and Amazon Web Services (AWS) are key players in the cloud analytics space, providing scalable solutions that facilitate real-time data analysis.

2. Service Types:

In addition to software products, the advanced analytics market is supported by a diverse range of service types. Consulting services play a crucial role, as businesses often require expert guidance to implement advanced analytics strategies effectively. Consulting firms specializing in data science and analytics help organizations identify relevant use cases, develop customized models, and integrate analytics into their decision-making processes. This segment is significant, as it not only supports the adoption of advanced analytics but also drives innovation within organizations.

Managed services are another critical component of the market, allowing organizations to outsource their analytics needs to specialized providers. This model is particularly appealing to companies that lack the internal resources or expertise to manage advanced analytics initiatives. By leveraging managed services, organizations can benefit from the latest analytics technologies and methodologies while

focusing on their core business operations. This segment is expected to see considerable growth as the demand for advanced analytics continues to rise.

3. Market Trends and Dynamics:

The market dynamics of advanced analytics are also influenced by several trends. The increasing emphasis on artificial intelligence (AI) and machine learning has propelled the adoption of advanced analytics solutions. Businesses are investing in AI-driven analytics tools to enhance predictive capabilities and automate decision-making processes. As a result, products that integrate AI and machine learning functionalities are capturing a larger market share.

Furthermore, the rise of big data has compelled organizations to adopt advanced analytics solutions to extract meaningful insights from unstructured and structured data. Industries such as healthcare, finance, and e-commerce are particularly active in adopting advanced analytics, which is reflected in their significant market shares.

Application Types

The Advanced Analytics Market has seen significant growth and diversification in recent years, driven by the increasing availability of big data, advancements in machine learning algorithms, and the need for organizations to make data-driven decisions. This market encompasses a range of applications across various industries, each leveraging advanced analytical techniques to extract meaningful insights from vast datasets. Here, we explore some key applications in the Advanced Analytics Market.

1. Predictive Analytics

Predictive analytics is one of the most prominent applications in the advanced analytics landscape. Organizations utilize predictive models to forecast future events based on historical data. This is particularly valuable in sectors like finance, where banks and investment firms predict market trends and customer behaviors. Retailers employ predictive analytics to optimize inventory management and enhance customer experience by anticipating shopping patterns.

2. Customer Analytics

Understanding customer behavior is critical for businesses aiming to improve engagement and retention. Advanced analytics tools allow organizations to analyze customer data, segment their audience, and personalize marketing strategies. By using techniques such as sentiment analysis and clustering, companies can tailor their offerings and communication strategies to meet the specific needs of different customer segments.

3. Operational Analytics

Organizations are increasingly using advanced analytics to streamline operations and enhance efficiency. This application involves analyzing data related to supply chain management, production processes, and resource allocation. For instance, manufacturing companies use operational analytics to identify bottlenecks in production lines and optimize processes, leading to reduced costs and improved productivity.

4. Risk Management

In sectors such as finance and insurance, risk management is crucial for ensuring stability and compliance. Advanced analytics helps organizations assess potential risks by analyzing historical data and identifying patterns that could indicate future threats. Financial institutions use advanced risk modeling techniques to evaluate credit risk, market risk, and operational risk, thereby making informed decisions to mitigate potential losses.

5. Healthcare Analytics

The healthcare industry has embraced advanced analytics to improve patient outcomes and operational efficiency. Applications range from predictive modeling for patient diagnosis to analyzing treatment effectiveness. By examining large volumes of patient data, healthcare providers can identify trends in disease outbreaks, optimize treatment plans, and enhance resource allocation in hospitals.

6. Fraud Detection

Fraud detection is another critical area where advanced analytics plays a vital role. Financial institutions and e-commerce platforms employ sophisticated algorithms to analyze transaction patterns and detect anomalies that may indicate fraudulent activity. Machine learning models can learn from historical fraud data to enhance detection accuracy, significantly reducing financial losses.

7. Social Media Analytics

With the rise of social media, organizations are tapping into social media analytics to gauge public sentiment and brand perception. By analyzing social media interactions, businesses can gain insights into customer preferences and market trends. This data is invaluable for shaping marketing strategies and improving customer relations.

8. Sports Analytics

The use of advanced analytics in sports has transformed how teams evaluate player performance and make strategic decisions. Teams analyze player statistics, game footage, and even biometric data to enhance training programs and game strategies. This data-driven approach allows teams to gain a competitive edge and improve overall performance.

Market Share of Application Types

The advanced analytics market has seen significant growth in recent years, driven by the increasing need for organizations to harness large volumes of data for strategic decision-making. With businesses across various sectors recognizing the value of data-driven insights, the demand for advanced analytics applications has surged, leading to a dynamic landscape characterized by diverse players and competitive strategies.

The advanced analytics market is segmented into various applications, including predictive analytics, prescriptive analytics, descriptive analytics, and diagnostic analytics. Each of these segments serves different business needs, and their market shares reflect the varying priorities and capabilities of organizations.

Predictive analytics has emerged as a dominant application within the advanced analytics market. Its ability to forecast future trends and behaviors based on historical data makes it invaluable for sectors such as finance, healthcare, and retail. For instance, financial institutions utilize predictive analytics for risk assessment and fraud detection, while retailers leverage it for inventory management and customer behavior prediction. As a result, predictive analytics holds a substantial market share, estimated to be around 40% of the overall advanced analytics market.

Descriptive analytics, which focuses on understanding past performance through data aggregation and mining, also commands a significant share. This application allows organizations to make sense of historical data and derive insights that can inform strategic decisions. The rise of business intelligence tools has bolstered the growth of descriptive analytics, contributing to its market share of approximately 25%. Many companies invest in descriptive analytics to enhance operational efficiency and improve customer engagement.

Prescriptive analytics, while newer than its counterparts, is gaining traction as organizations seek not only to understand what has happened and what is likely to happen but also what actions they should take. This application leverages algorithms and machine learning to recommend optimal actions. Though its market share is currently smaller, around 15%, it is growing rapidly as more businesses recognize its potential to enhance decision-making processes. Industries such as supply chain management and healthcare are increasingly adopting prescriptive analytics to optimize operations and improve outcomes.

Diagnostic analytics, which delves into the reasons behind past outcomes, accounts for about 10% of the market share. While it is crucial for understanding the causal relationships within data, its application is often intertwined with descriptive analytics, limiting its standalone growth potential. Nonetheless, organizations value diagnostic analytics for its role in root cause analysis and operational troubleshooting.

The remaining market share is comprised of niche applications, including text analytics, social media analytics, and real-time analytics. These applications are increasingly relevant as businesses look to leverage unstructured data from various sources, including social media platforms and IoT devices. The emergence of big data and the proliferation of data sources are driving innovation in these areas, further diversifying the advanced analytics landscape.

End Users Types

The Advanced Analytics Market is rapidly evolving, driven by the increasing need for organizations to extract meaningful insights from vast amounts of data. End users of advanced analytics span across various industries, each with distinct needs and applications. Understanding these end users is crucial for vendors and stakeholders aiming to tailor solutions effectively.

1. Corporate Enterprises

Corporate enterprises are among the largest end users of advanced analytics. These organizations leverage analytics to enhance decision-making, optimize operations, and improve customer experiences. For instance, in retail, companies utilize advanced analytics to analyze consumer behavior, manage inventory, and personalize marketing strategies. Similarly, in the financial sector, banks and investment firms use predictive analytics to assess risk, detect fraud, and identify investment opportunities. The need for real-time data processing and predictive modeling drives these enterprises to adopt advanced analytics solutions.

2. Healthcare Providers

The healthcare industry is increasingly adopting advanced analytics to improve patient outcomes and streamline operations. Hospitals and healthcare providers analyze patient data to identify trends, optimize treatment plans, and predict disease outbreaks. Advanced analytics also plays a significant role in operational efficiency, helping organizations manage resources, reduce costs, and enhance patient care. For example, predictive analytics can be used to forecast patient admissions, enabling better staffing and resource allocation.

3. Government Agencies

Government agencies are significant end users of advanced analytics, utilizing data to enhance public services and make informed policy decisions. Analytics can help in various areas, such as public safety, transportation, and social services. For instance, law enforcement agencies employ predictive analytics to identify crime hotspots and allocate resources effectively. Similarly, transportation departments analyze traffic patterns to optimize road usage and reduce congestion. By harnessing advanced analytics, government agencies can improve transparency, accountability, and service delivery.

4. Manufacturing Sector

The manufacturing sector is increasingly embracing advanced analytics to optimize production processes and improve supply chain management. Companies use analytics to monitor equipment performance, predict maintenance needs, and reduce downtime. By analyzing production data, manufacturers can identify inefficiencies, enhance quality control, and streamline operations. Advanced analytics also supports demand forecasting, enabling manufacturers to align production schedules with market demand effectively.

5. Telecommunications

Telecommunications companies leverage advanced analytics to enhance customer experience and improve operational efficiency. By analyzing customer data, telecom providers can identify churn patterns, tailor service offerings, and optimize pricing strategies. Network performance analytics is also crucial for identifying issues and improving service delivery. This sector relies heavily on real-time data analysis to make swift decisions and maintain competitive advantages.

6. Energy Sector

The energy sector utilizes advanced analytics for resource management and sustainability efforts. Companies analyze data from various sources, such as smart meters and sensors, to optimize energy distribution, predict demand, and minimize waste. Predictive analytics can also assist in maintenance scheduling for infrastructure, ensuring reliability and efficiency in operations.

Market Share of End Users Types

The Advanced Analytics Market has witnessed significant growth in recent years, driven by the increasing need for organizations to harness vast amounts of data to enhance decision-making and optimize operations. Advanced analytics encompasses a wide range of techniques, including predictive analytics, data mining, machine learning, and artificial intelligence, which organizations leverage to uncover patterns, identify trends, and forecast future outcomes. Understanding the market share among end users is crucial for stakeholders, as it highlights the varying demands and applications of advanced analytics across different sectors.

One of the primary end-user segments in the Advanced Analytics Market is the financial services industry. Banks, investment firms, and insurance companies extensively utilize advanced analytics to

manage risk, detect fraud, and optimize trading strategies. The financial sector's drive towards automation and data-driven decision-making has resulted in a substantial market share. As regulations become more stringent, the need for robust data analysis tools to ensure compliance and improve customer experiences continues to grow.

Healthcare is another significant end-user segment, where advanced analytics is increasingly being adopted to enhance patient care, streamline operations, and reduce costs. Hospitals and healthcare providers use predictive analytics to anticipate patient admissions, manage resources effectively, and improve treatment outcomes. The rise of electronic health records (EHR) and the growing emphasis on personalized medicine have propelled the demand for advanced analytics solutions in this sector, positioning it as a key player in the market.

Retail and e-commerce also represent a considerable share of the Advanced Analytics Market. Companies in this sector leverage advanced analytics to gain insights into consumer behavior, optimize inventory management, and personalize marketing strategies. With the advent of big data and the increasing importance of customer experience, retailers are turning to advanced analytics to stay competitive. The ability to analyze customer data in real-time allows businesses to tailor their offerings and enhance customer satisfaction, further solidifying the retail sector's market share.

Moreover, the manufacturing industry is increasingly adopting advanced analytics to improve operational efficiency and predictive maintenance. By analyzing data from machinery and supply chains, manufacturers can reduce downtime, predict equipment failures, and streamline production processes. This proactive approach to analytics has led to considerable investments in advanced analytics tools, thus increasing the manufacturing sector's market share.

The telecommunications and IT services sectors are also noteworthy end users of advanced analytics. Telecommunications companies utilize these tools for network optimization, customer retention strategies, and churn prediction. Similarly, IT service providers leverage advanced analytics to enhance cybersecurity measures and improve service delivery. The proliferation of IoT devices and the vast amounts of data generated in these industries necessitate advanced analytics for effective management and operational insights.

Current Market Trends

The advanced analytics market is experiencing significant growth and transformation as organizations increasingly recognize the value of data-driven decision-making. As we move into 2023, several key trends and developments are shaping the landscape of advanced analytics.

1. **Rise of AI and Machine Learning:** One of the most profound trends in advanced analytics is the integration of artificial intelligence (AI) and machine learning (ML) technologies. Organizations are leveraging these tools to analyze vast amounts of data, uncover patterns, and make predictions with higher accuracy. Automated machine learning (AutoML) is gaining traction, enabling users with limited data science expertise to build models efficiently. This democratization of analytics is empowering more business users to derive insights from data.

2. **Cloud-based Analytics Solutions:** The shift to cloud-based analytics platforms is accelerating as organizations seek scalability, flexibility, and cost-effectiveness. Cloud solutions allow for real-time data processing and analysis, enabling businesses to respond quickly to market changes. Major providers such as AWS, Google Cloud, and Microsoft Azure are enhancing their analytics offerings, making it easier for companies to adopt advanced analytics without significant upfront investments in infrastructure.

3. **Data Privacy and Governance:** With the increasing focus on data privacy and regulations like GDPR and CCPA, organizations are prioritizing data governance in their analytics strategies. Companies are investing in solutions that ensure compliance while still enabling robust data analysis. This trend is fostering the development of privacy-preserving analytics methods, such as differential privacy and federated learning, which allow organizations to gain insights without compromising sensitive information.

4. **Real-time Analytics:** The demand for real-time analytics is growing as businesses strive to make timely decisions based on the most current data. Industries such as finance, retail, and healthcare are leveraging real-time analytics to enhance operational efficiency, improve customer experiences, and drive strategic initiatives. Technologies like stream processing and event-driven architectures are enabling organizations to analyze data as it is generated, facilitating immediate insights and actions.

5. **Increased Focus on Explainability and Transparency:** As advanced analytics and AI become more entrenched in decision-making processes, there is a heightened emphasis on the explainability of models and analytics outcomes. Stakeholders are demanding transparency to understand how insights are derived, especially in sensitive areas like healthcare and finance. This trend is prompting organizations to adopt more interpretable models and invest in tools that offer insights into the decision-making processes of AI systems.

6. Integration of IoT and Advanced Analytics: The Internet of Things (IoT) is generating an unprecedented volume of data, and businesses are increasingly turning to advanced analytics to make sense of it. By integrating IoT data with analytics, companies can monitor operations in real-time, predict maintenance needs, and enhance customer experiences. This trend is particularly evident in sectors like manufacturing, where predictive maintenance powered by advanced analytics can significantly reduce downtime and costs.

7. Emphasis on Skills and Talent Development: As the demand for advanced analytics professionals continues to grow, organizations are focusing on upskilling their existing workforce and attracting new talent. Initiatives such as mentorship programs, partnerships with educational institutions, and online training platforms are becoming common as companies seek to bridge the analytics skills gap.

Market Drivers

The Advanced Analytics Market has experienced substantial growth in recent years, driven by a confluence of technological advancements, evolving business needs, and increasing data volumes. Organizations across various sectors are leveraging advanced analytics to gain actionable insights, enhance decision-making, and maintain a competitive edge. Several key market drivers are shaping the trajectory of this dynamic industry.

1. Data Explosion

The exponential growth of data generated from various sources, including social media, IoT devices, and enterprise applications, is a primary driver for advanced analytics. Organizations are sitting on vast amounts of structured and unstructured data, necessitating sophisticated analytics solutions to extract meaningful insights. This data deluge creates a pressing need for tools that can analyze and interpret data effectively, leading to the adoption of advanced analytics technologies.

2. Increased Demand for Real-time Analytics

In today's fast-paced business environment, the ability to make real-time decisions is crucial. Organizations are seeking to harness real-time data analytics to respond swiftly to market changes, customer behaviors, and operational challenges. This demand for immediacy is pushing businesses to

invest in advanced analytics solutions that can process and analyze data on-the-fly, enabling timely and informed decision-making.

3. Cloud Computing and Scalability

The rise of cloud computing has revolutionized the way organizations approach data analysis. Cloud-based advanced analytics solutions offer scalability, flexibility, and cost-effectiveness, allowing businesses to manage large datasets without the need for extensive on-premises infrastructure. This shift to the cloud is driving the adoption of advanced analytics tools, as organizations can easily scale their analytics capabilities according to their needs.

4. Emergence of AI and Machine Learning

Artificial intelligence (AI) and machine learning (ML) are at the forefront of advanced analytics. These technologies enhance the ability to uncover patterns, predict outcomes, and automate decision-making processes. As organizations recognize the transformative potential of AI and ML, there is a growing investment in advanced analytics solutions that incorporate these technologies, enabling deeper insights and more sophisticated predictive models.

5. Competitive Pressure and Market Differentiation

In an intensely competitive landscape, businesses are increasingly leveraging advanced analytics to gain a strategic advantage. Companies that utilize data-driven insights can identify new opportunities, optimize operations, and improve customer experiences. The desire to differentiate from competitors and innovate continuously fosters a robust demand for advanced analytics solutions, compelling organizations to invest in these capabilities.

6. Regulatory Compliance and Risk Management

As data privacy regulations become more stringent, organizations are compelled to adopt advanced analytics for compliance and risk management. Advanced analytics tools enable businesses to monitor data usage, identify potential risks, and ensure that practices align with regulatory standards. Consequently, the need for effective risk management and compliance is driving the adoption of advanced analytics solutions across various industries.

7. Skilled Workforce and Training

The availability of a skilled workforce proficient in data analytics is a crucial driver of the market. As educational institutions and training programs evolve to meet the demand for data analytics skills, more professionals are entering the field. This influx of talent enhances the ability of organizations to implement and leverage advanced analytics, further fueling market growth.

Market Restraints

The advanced analytics market, encompassing technologies and methodologies that leverage data to derive insights and inform decision-making, has witnessed significant growth in recent years. However, despite its promising trajectory, the market faces several restraints that can hinder its expansion and adoption across various sectors. Understanding these challenges is crucial for stakeholders aiming to navigate this complex landscape effectively.

1. **Data Privacy and Security Concerns:** One of the most pressing restraints in the advanced analytics market is the growing concern over data privacy and security. With stringent regulations such as the General Data Protection Regulation (GDPR) in Europe and the California Consumer Privacy Act (CCPA) in the United States, organizations must ensure compliance when handling personal data. These regulations can complicate data collection and usage, leading to a reluctance among businesses to fully embrace advanced analytics. Companies may fear reputational damage or legal repercussions if they mishandle sensitive information, which can stifle innovation and limit the scope of analytics projects.

2. **High Implementation Costs:** The initial investment required for advanced analytics solutions can be considerable, posing a barrier for small and medium-sized enterprises (SMEs). The costs associated with acquiring software, investing in infrastructure, and hiring skilled personnel can be daunting. Many organizations may hesitate to allocate budgets for advanced analytics initiatives, especially when the return on investment (ROI) is not immediately apparent. This financial constraint can prevent businesses from leveraging the full power of analytics, resulting in missed opportunities for growth and efficiency.

3. **Lack of Skilled Workforce:** The success of advanced analytics largely depends on the expertise of professionals who can interpret data and derive actionable insights. However, there is a notable skills

gap in the labor market, with a shortage of qualified data scientists, analysts, and engineers. This scarcity can hinder organizations' ability to implement and sustain advanced analytics initiatives effectively. Without the right talent, businesses may struggle to extract meaningful insights from their data, leading to poor decision-making and suboptimal outcomes.

4. Resistance to Change: Change management is a critical aspect of adopting advanced analytics. Many organizations face internal resistance when attempting to integrate new technologies and methodologies into their existing processes. Employees may be apprehensive about adopting analytics tools, fearing that these innovations could disrupt their workflows or replace their roles. Additionally, a lack of awareness and understanding of the benefits of advanced analytics can lead to skepticism and reluctance among staff, ultimately hampering the successful implementation of analytics initiatives.

5. Integration Challenges: Integrating advanced analytics solutions with existing systems and data sources can be complex and time-consuming. Organizations often struggle with data silos, where information is trapped in disparate systems, making it difficult to achieve a unified view of data. This fragmentation can hinder the effectiveness of analytics initiatives, as incomplete or inconsistent data can lead to inaccurate insights. Overcoming these integration challenges requires careful planning, investment in technology, and a commitment to data governance, which can be resource-intensive.

6. Rapid Technological Changes: The rapid pace of technological advancement in the advanced analytics market can also be a double-edged sword. While innovation drives the market forward, it can create uncertainty for organizations trying to keep up. Businesses may be reluctant to invest in advanced analytics solutions that could quickly become obsolete, leading to hesitation in adopting new technologies.

Major Players

The Advanced Analytics Market has seen significant growth over the past few years, driven by the increasing demand for data-driven decision-making across various industries. Here are ten major companies that are leading the charge in this dynamic market:

1. IBM: A pioneer in the analytics space, IBM offers a comprehensive suite of advanced analytics solutions through its Watson platform. With capabilities in artificial intelligence (AI) and machine learning, IBM helps organizations harness their data to gain insights and improve operational efficiency.

2. SAS: Known for its robust statistical analysis and data management tools, SAS delivers advanced analytics solutions that empower businesses to perform predictive analytics, machine learning, and data visualization. Their focus on analytics innovation has made them a preferred choice for organizations across diverse sectors.

3. Microsoft: With its Azure cloud platform and Power BI suite, Microsoft has established itself as a formidable player in the advanced analytics market. Their solutions enable users to analyze data with ease and integrate analytics seamlessly into business workflows.

4. Tableau: Acquired by Salesforce, Tableau is renowned for its data visualization capabilities. The platform allows users to create interactive and shareable dashboards, making it easier for organizations to interpret complex data and make informed decisions.

5. Google Cloud: Google's cloud services include BigQuery, a powerful data warehouse solution that supports advanced analytics. With built-in machine learning capabilities, Google Cloud helps businesses analyze large datasets efficiently, enabling real-time insights and predictive modeling.

6. Oracle: Oracle's advanced analytics solutions are integrated within its cloud applications, offering businesses sophisticated tools for data analysis and visualization. Their emphasis on database management and analytics makes them a top choice for enterprises needing robust data solutions.

7. SAP: SAP Analytics Cloud combines business intelligence, augmented analytics, and enterprise planning in a single platform. This comprehensive solution allows organizations to leverage their data for strategic planning and operational improvements.

8. Qlik: Qlik's associative data indexing engine allows users to explore data freely, uncovering hidden insights. Their platform supports self-service analytics, enabling business users to create personalized dashboards and reports without needing extensive technical expertise.

9. TIBCO Software: TIBCO offers a range of advanced analytics tools, including predictive analytics and data visualization solutions. Their integration capabilities allow organizations to connect disparate data sources, facilitating a holistic approach to data analysis.

10. Alteryx: Alteryx specializes in data preparation and analytics automation. Their platform simplifies the data blending process, enabling users to perform sophisticated analyses without extensive coding knowledge. This ease of use attracts both data analysts and business users looking to leverage analytics for decision-making.

The advanced analytics market is characterized by rapid innovation and competition. These ten companies are at the forefront, providing a diverse range of solutions that address the evolving needs of businesses. As organizations continue to recognize the importance of data-driven insights, the demand for advanced analytics technologies is expected to grow, further solidifying the positions of these market leaders. In an era where data is often referred to as the new oil, the capabilities offered by these companies will be crucial for businesses aiming to harness the power of their data, improve operational efficiencies, and enhance customer experiences.

Market Opportunities

Market Opportunities from Gross Domestic Production Changes

The Advanced Analytics Market is experiencing significant growth, driven by various factors, including technological advancements, increased data generation, and changing economic conditions. One of the most notable influences on this market is the fluctuating Gross Domestic Product (GDP) of the United States. The U.S. economy is navigating a complex landscape marked by shifts in consumer behavior, business investment, and government policies, all of which create ample opportunities for advanced analytics solutions.

In the third quarter of 2023, the U.S. GDP grew at an annualized rate of approximately 2.1%. This growth, although modest compared to previous years, indicates resilience in the economy. The increasing GDP suggests a rising level of business activity, which in turn fuels demand for advanced analytics. Companies across various sectors are seeking ways to optimize operations, enhance customer experiences, and make data-driven decisions. This trend is particularly prominent in industries such as finance, healthcare, retail, and manufacturing, where data plays a crucial role in strategy formulation and operational efficiency.

One of the key drivers of market opportunity in the advanced analytics space is the growing volume of data generated daily. According to estimates, the world generates approximately 2.5 quintillion bytes of data every day, and a significant portion of this data comes from U.S. businesses. Organizations are increasingly recognizing the value of leveraging data to gain insights and drive performance. Advanced analytics tools, including machine learning, predictive analytics, and big data analytics, empower businesses to extract actionable insights from vast datasets. This capability is essential for organizations looking to maintain a competitive edge in a rapidly changing economic landscape.

Moreover, the shift towards a digital-first economy is accelerating the adoption of advanced analytics. As businesses invest in digital transformation initiatives, they are prioritizing data analytics capabilities to enhance decision-making processes. For instance, in the retail sector, companies are using advanced analytics to understand consumer behavior and personalize marketing strategies, resulting in improved customer engagement and increased sales. Similarly, in the healthcare industry, advanced analytics tools are being utilized to optimize patient care and streamline operations, leading to cost savings and improved health outcomes.

Furthermore, the rise of artificial intelligence (AI) and machine learning technologies is revolutionizing the advanced analytics market. According to industry reports, the global advanced analytics market is

projected to reach USD 125 billion by 2026, growing at a compound annual growth rate (CAGR) of around 20%. This growth is indicative of the increasing investment in AI-driven analytics solutions, which are enhancing the ability of organizations to analyze complex datasets and derive meaningful insights.

Economic Indicators

Gross Domestic Product (Nominal/Current/Not Inflation-Adjusted)

Global Gross Domestic Product is estimated to be \$129,211.6 billion dollars in 2025 and is expected to change by 6 percent from 2025 to 2026. European GDP will be \$19,753.0 billion in 2025 and is forecast to change by 2 percent from 2025 to 2026.

Gross Domestic Product			
Region	2025	2026	Chg.
World	129,211,561	136,996,557	6.0%
North America	37,139,994	40,224,470	8.3%
Europe	19,753,017	20,143,139	2.0%
Asia-Pacific	40,999,355	43,641,763	6.4%
Latin America	6,894,647	6,996,687	1.5%

GDP is estimated to be \$32.9 billion in the United States in 2025.

GDP is estimated to be \$26.2 billion in China in 2025.

GDP is estimated to be \$4.8 billion in Japan in 2025.

Gross Domestic Product			
Country	2025	2026	Chg.
Argentina	766,288	821,193	7.2%
Australia	2,119,332	2,250,200	6.2%
Bangladesh	706,078	793,844	12.4%
Brazil	2,021,277	2,015,112	-0.3%
Canada	2,916,496	3,175,335	8.9%
China	26,164,005	28,854,972	10.3%
Egypt	737,492	831,264	12.7%
France	3,165,028	3,182,436	0.5%
Germany	4,804,910	4,878,906	1.5%
India	4,460,405	4,808,762	7.8%
Indonesia	1,738,617	1,879,098	8.1%
Italy	2,280,562	2,284,895	0.2%
Japan	4,774,664	4,722,859	-1.1%
Malaysia	475,286	490,733	3.2%
Mexico	1,736,634	1,821,468	4.9%
Philippines	512,037	536,359	4.8%
Poland	916,715	979,097	6.8%
Russia	2,559,575	2,617,421	2.3%
Saudi Arabia	1,486,735	1,651,465	11.1%
Singapore	669,116	736,529	10.1%
South Korea	1,916,874	1,923,391	0.3%
Spain	1,549,418	1,550,270	0.1%
Switzerland	1,059,527	1,117,324	5.5%
United Kingdom	3,716,127	3,824,081	2.9%
United States	32,884,572	34,959,589	6.3%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities from GDP per Capita Changes

The Advanced Analytics Market in the United States is witnessing significant growth, driven by various factors, including changes in GDP per capita. The GDP per capita in the United States stands at approximately \$76,000, reflecting a robust economy that has rebounded from the pandemic-induced downturn. This increase in GDP per capita indicates a higher disposable income among consumers and businesses, creating fertile ground for market opportunities in advanced analytics.

Advanced analytics refers to the use of sophisticated tools and techniques to analyze complex data sets, enabling organizations to make data-driven decisions. The rising GDP per capita suggests that businesses across various sectors—such as finance, healthcare, retail, and manufacturing—are increasingly willing to invest in advanced analytics solutions to gain a competitive edge. With more financial resources at their disposal, organizations are prioritizing data-driven strategies to optimize operations, enhance customer experiences, and innovate product offerings.

One of the most significant market opportunities arises in the healthcare sector. As consumers gain more financial resources, there is an increasing demand for personalized healthcare solutions. Advanced analytics can facilitate improved patient outcomes through predictive modeling, real-time data analysis, and personalized treatment plans. According to a report by Fortune Business Insights, the healthcare analytics market is projected to reach \$95 billion by 2027, driven by the need for enhanced clinical and operational efficiencies.

In the retail sector, the changing GDP per capita is leading to a more discerning consumer base. Shoppers are not only looking for quality products but also personalized shopping experiences. Retailers are leveraging advanced analytics to analyze consumer behavior, optimize inventory management, and tailor marketing strategies. The National Retail Federation predicts that U.S. retail sales will exceed \$5 trillion in 2023, further underscoring the need for advanced analytics to navigate this competitive landscape.

Moreover, the financial services industry is also embracing advanced analytics as GDP per capita rises. With consumers having more disposable income, there is a growing demand for tailored financial products and services. Banks and financial institutions are using advanced analytics to better understand customer needs, assess credit risk, and enhance fraud detection. A report from McKinsey indicates that financial services firms that leverage advanced analytics can enhance their profitability by up to 20% through improved operational efficiencies and customer insights.

The manufacturing sector presents another significant opportunity for advanced analytics. As companies seek to streamline operations and reduce costs, predictive maintenance and supply chain optimization driven by advanced analytics can lead to substantial savings and increased productivity. The manufacturing analytics market is projected to reach \$20 billion by 2026, highlighting the demand for data-driven insights in optimizing production processes.

Economic Indicators

GDP per Capita

GDP per Capita is estimated to be \$14,215 in 2025 in the World.

GDP per Capita is estimated to be \$91,823 in 2025 in North America.

GDP per Capita is estimated to be \$49,138 in 2025 in Europe.

Region	GDP per Capita		
	2025	2026	Chg.
World	14,215	14,203	-0.1%
North America	91,823	93,729	2.1%
Europe	49,138	49,877	1.5%
Asia-Pacific	14,667	14,685	0.1%
Latin America	12,857	13,262	3.2%

GDP per Capita is estimated to be \$94,214 in 2025 in the United States.

GDP per Capita is estimated to be \$15,476 in 2025 in China.

GDP per Capita is estimated to be \$5,012 in 2025 in Japan.

Country	GDP per Capita		
	2025	2026	Chg.
Argentina	17,830	18,599	4.3%
Australia	78,020	79,756	2.2%
Bangladesh	3,423	3,524	2.9%
Brazil	10,159	10,026	-1.3%
Canada	67,441	69,235	2.7%
China	15,476	16,020	3.5%
Egypt	5,454	5,673	4.0%
France	62,715	64,468	2.8%
Germany	5,579	5,244	-6.0%
India	118,389	127,682	7.9%
Indonesia	2,235	2,127	-4.8%
Italy	71,856	75,427	5.0%
Japan	5,012	4,715	-5.9%
Malaysia	12,187	11,904	-2.3%
Mexico	13,191	13,304	0.9%
Philippines	9,516	10,051	5.6%
Poland	3,017	2,851	-5.5%
Russia	20,310	21,143	4.1%
Saudi Arabia	1,952	1,829	-6.3%
Singapore	679	632	-6.9%
South Korea			#VALUE!
Spain			#VALUE!
Switzerland	102,737	101,987	-0.7%
United Kingdom	50,018	49,578	-0.0088
United States	94,214	96,042	1.9%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities from Population Changes

The Advanced Analytics Market is experiencing substantial growth in the United States, driven by the dynamic shifts in the population landscape. The U.S. population stands at approximately 333 million, with significant demographic changes influencing consumer behavior, business needs, and strategic decision-making. These evolving demographics present numerous market opportunities for advanced analytics solutions across various sectors.

One of the most notable trends is the aging population. The U.S. Census Bureau reports that by 2030, all Baby Boomers will be over the age of 65, leading to a significant increase in the elderly demographic. This shift creates opportunities for advanced analytics in healthcare, where predictive analytics can be used to improve patient outcomes, optimize resource allocation, and enhance operational efficiency in healthcare facilities. With an increasing focus on personalized medicine, healthcare providers can leverage big data to better understand the health trends and needs of older adults, creating tailored care strategies.

Additionally, the growing multicultural population in the U.S. presents a unique challenge and opportunity for businesses. The U.S. Census Bureau indicates that by 2045, the nation will become "minority white," with diverse ethnic groups becoming increasingly prominent. Companies can utilize advanced analytics to better understand the preferences and behaviors of these demographic segments. By employing data-driven insights, businesses can tailor marketing strategies, product offerings, and customer service approaches to resonate with various cultural groups, thereby enhancing customer satisfaction and loyalty.

Urbanization is another critical factor in shaping the advanced analytics market. According to the U.S. Census Bureau, over 80% of the population lives in urban areas, leading to increased demand for smart city initiatives. Advanced analytics can facilitate urban planning, traffic management, and public safety enhancements by analyzing vast amounts of data from IoT devices. This can help city planners optimize resource allocation and improve the quality of life for residents. Companies specializing in analytics solutions can capitalize on this trend by providing services that support urban development and infrastructure improvements.

Furthermore, the rise of remote work and the gig economy has transformed the workforce landscape. A recent report from the Bureau of Labor Statistics indicates that over 30% of the workforce is now engaged in freelance or gig work. Advanced analytics can play a vital role in understanding workforce trends, optimizing talent acquisition, and improving employee engagement strategies. Organizations can leverage data to predict workforce needs, assess employee productivity, and enhance overall organizational performance.

In e-commerce, the changing demographics are also propelling opportunities in advanced analytics. With the rise of younger, tech-savvy consumers—particularly Gen Z and Millennials—businesses need to understand purchasing patterns and preferences. Advanced analytics can enable companies to analyze customer data, predict trends, and optimize inventory management, enhancing the overall shopping experience.

Economic Indicators

Total Population

Total Population is estimated to be 7923.4 million in 2025 in the World.

Total Population is estimated to be 368.8 million in 2025 in North America.

Total Population is estimated to be 430.8 million in 2025 in Europe.

Region	Total Population		
	2025	2026	Chg.
World	7,923,436,000	7,938,332,000	0.2%
North America	368,765,000	368,396,000	-0.1%
Europe	430,800,000	426,853,000	-0.9%
Asia-Pacific	2,313,525,000	2,301,588,000	-0.5%
Latin America	674,398,000	686,052,000	1.7%

Total Population is estimated to be 323.6 million in 2025 in the United States.

Total Population is estimated to be 1352.4 million in 2025 in China.

Total Population is estimated to be 118.4 million in 2025 in Japan.

Country	Total Population		
	2025	2026	Chg.
Argentina	43,912,000	43,677,000	-0.5%
Australia	25,627,000	25,615,000	0.0%
Bangladesh	165,792,000	165,746,000	0.0%
Brazil	200,219,000	198,025,000	-1.1%
Canada	38,765,000	38,888,000	0.3%
China	1,352,377,000	1,340,746,000	-0.9%
Egypt	114,583,000	115,775,000	1.0%
France	65,806,000	65,382,000	-0.6%
Germany	80,915,000	80,320,000	-0.7%
India	1,411,541,000	1,413,686,000	0.2%
Indonesia	277,220,000	278,041,000	0.3%
Italy	55,910,000	55,185,000	-1.3%
Japan	118,419,000	116,904,000	-1.3%
Malaysia	35,034,000	35,328,000	0.8%
Mexico	126,921,000	126,977,000	0.0%
Philippines	112,647,000	113,021,000	0.3%
Poland	34,482,000	33,910,000	-1.7%
Russia	138,274,000	136,858,000	-1.0%
Saudi Arabia	30,014,000	29,429,000	-1.9%
Singapore	5,434,000	5,348,000	-1.6%
South Korea	49,303,000	48,806,000	-1.0%
Spain	46,337,000	46,079,000	-0.0056
Switzerland	8,620,000	8,614,000	-0.1%
United Kingdom	65,891,000	65,562,000	-0.005
United States	323,563,000	322,178,000	-0.4%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Manufacturing Sector

The Advanced Analytics Market is rapidly evolving, driven by transformative changes in the manufacturing sector in the United States. As industries embrace digital transformation, the demand for advanced analytics solutions has surged, presenting significant market opportunities. This evolution is primarily fueled by the need for improved operational efficiency, reduced costs, and enhanced decision-making capabilities.

According to a report by Fortune Business Insights, the advanced analytics market is projected to grow from approximately \$22 billion in 2021 to around \$66 billion by 2028, exhibiting a compound annual growth rate (CAGR) of 17.1%. This growth trajectory is indicative of the increasing reliance on data-driven insights across various sectors, particularly manufacturing.

One of the primary drivers of this market opportunity is the shift towards Industry 4.0, characterized by the integration of IoT (Internet of Things), AI (Artificial Intelligence), and big data analytics into manufacturing processes. The U.S. manufacturing sector, which contributes nearly 8% to the GDP, is increasingly adopting smart manufacturing practices. A McKinsey Global Institute report suggests that by 2030, automation and advanced analytics could increase productivity by 20-25% across manufacturing industries.

The current statistics highlight the urgency for manufacturers to leverage advanced analytics. A survey by Deloitte revealed that 63% of manufacturers are investing in predictive analytics to improve operational performance. Furthermore, manufacturers are increasingly recognizing the value of real-time data analysis. According to a report from PwC, 72% of manufacturers believe that data-driven decision-making is critical to maintaining competitiveness in the market.

The application of advanced analytics in predictive maintenance is a significant opportunity area. By utilizing machine learning algorithms and data analytics, manufacturers can predict equipment failures before they occur, reducing downtime and maintenance costs. According to a report by Statista, predictive maintenance can save companies between 10-40% in maintenance costs, translating to substantial savings and improved profitability.

Another area of opportunity is supply chain optimization. Advanced analytics can help manufacturers analyze complex supply chain data to identify inefficiencies and streamline operations. A recent study by the APICS Supply Chain Council found that companies employing advanced analytics in their supply chain management experience a 15-20% reduction in logistics costs, making it a vital focus for manufacturers looking to enhance their competitiveness.

Moreover, the increasing emphasis on sustainability in manufacturing is creating a demand for advanced analytics tools that can measure and optimize resource usage. According to a report by Gartner, 54% of manufacturing organizations are prioritizing sustainability initiatives, and advanced analytics can play a critical role in achieving these goals. By analyzing energy consumption data and environmental impact metrics, manufacturers can make informed decisions that align with sustainability objectives.

However, despite these opportunities, the advanced analytics market faces challenges, including data privacy concerns, integration complexities, and a shortage of skilled data professionals. Addressing these challenges will be crucial for manufacturers looking to capitalize on the benefits of advanced analytics.

SECTOR

Manufacturing Sector

The Sector is estimated to be \$43,455.8 billion in 2025 in the Global.

The Sector is estimated to be \$7,831.8 billion in 2025 in North America.

The Sector is estimated to be \$6,664.6 billion in 2025 in Europe.

Manufacturing Sector (\$US Millions)			
Region	2025	2026	Chg.
Global	43,455,790.9	45,217,683.0	4.1%
North America	7,831,782.3	8,124,936.6	3.7%
Europe	6,664,571.1	6,808,862.6	2.2%
Latin America	2,980,469.3	3,086,098.7	3.5%
Asia-Pacific	20,749,471.6	21,678,184.1	4.5%

The Sector is estimated to be \$7,831.8 billion in 2025 in the United States.

The Sector is estimated to be \$14,620.7 billion in 2025 in China.

The Sector is estimated to be \$1,882.8 billion in 2025 in Japan.

Manufacturing Sector (\$US Millions)			
Country	2025	2026	Chg.
Argentina	294,091.5	321,589.9	9.4%
Australia	227,922.9	231,896.8	1.7%
Bangladesh	363,296.6	415,596.8	14.4%
Brazil	583,936.0	593,934.9	1.7%
Canada	535,056.2	556,303.8	4.0%
China	14,620,723.7	15,641,557.0	7.0%
Egypt	242,605.6	265,567.1	9.5%
France	593,999.8	570,666.6	-3.9%
Germany	1,742,739.6	1,689,410.8	-3.1%
India	1,213,340.7	1,258,753.3	3.7%
Indonesia	652,593.6	677,783.4	3.9%
Italy	774,259.6	772,349.3	-0.2%
Japan	1,882,795.6	1,791,126.8	-4.9%
Malaysia	256,574.8	267,025.5	4.1%
Mexico	834,952.7	886,007.1	6.1%
Philippines	173,838.7	173,563.7	-0.2%
Poland	355,689.3	379,391.2	6.7%
Russia	642,293.6	625,799.5	-2.6%
Saudi Arabia	482,806.4	541,215.4	12.1%
Singapore	277,962.6	297,543.0	7.0%
South Korea	994,368.7	963,335.4	-3.1%
Spain	382,272.7	377,044.9	-0.014
Switzerland	406,632.5	419,135.1	3.1%
United Kingdom	642,574.1	638,433.4	-0.006
United States	7,831,782.3	8,124,936.6	3.7%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Research Sector

The Advanced Analytics Market in the United States is experiencing significant growth driven by evolving trends in the research sector. As organizations increasingly seek to harness data for strategic decision-making, the demand for advanced analytics solutions has surged. This transformation is fueled by technological advancements, the proliferation of big data, and a growing emphasis on data-driven insights across various industries.

According to a report by Fortune Business Insights, the advanced analytics market was valued at approximately \$23 billion in 2021 and is projected to grow at a compound annual growth rate (CAGR) of around 25% from 2022 to 2029. This remarkable growth trajectory highlights the substantial market opportunities for businesses operating within this domain.

One of the key market drivers is the heightened focus on research and development (R&D) across sectors such as healthcare, finance, retail, and manufacturing. Organizations are increasingly investing in advanced analytics to derive actionable insights from complex datasets, which can lead to enhanced product development, optimized operations, and improved customer experiences. In healthcare, for instance, advanced analytics is being utilized to predict patient outcomes, streamline clinical trials, and personalize treatment plans based on genomic data. This shift not only improves patient care but also reduces costs, creating a compelling case for healthcare providers to adopt analytics solutions.

Moreover, the rise of artificial intelligence (AI) and machine learning (ML) technologies is revolutionizing the advanced analytics landscape. These technologies enable organizations to automate data processing, uncover hidden patterns, and generate predictive models with unprecedented accuracy. As a result, companies can make proactive decisions that align with market trends and customer preferences. For example, in the retail sector, businesses are leveraging advanced analytics to optimize inventory management, enhance pricing strategies, and tailor marketing campaigns, thereby driving sales and customer satisfaction.

Another significant opportunity lies in the increasing adoption of cloud-based analytics solutions. As organizations migrate to cloud environments, they gain access to scalable analytics tools that can accommodate large volumes of data. This shift not only reduces infrastructure costs but also enhances collaboration and accessibility for research teams. According to a report from Gartner, cloud analytics is expected to account for over 50% of the overall analytics market by 2025, indicating a substantial growth area for vendors in this space.

Furthermore, the changing regulatory landscape in the United States is creating additional opportunities for advanced analytics. Industries such as finance and healthcare are subject to stringent regulations that require organizations to maintain compliance while also leveraging data for competitive advantage. Advanced analytics can help organizations navigate these complexities by providing insights into compliance risks, operational efficiencies, and customer behaviors.

SECTOR

Research Sector

The Sector is estimated to be \$771.2 billion in 2025 in the Global.

The Sector is estimated to be \$276.9 billion in 2025 in North America.

The Sector is estimated to be \$119.0 billion in 2025 in Europe.

Research Sector (\$US Millions)			
Region	2025	2026	Chg.
Global	771,165.4	782,260.7	1.4%
North America	276,872.7	287,916.7	4.0%
Europe	119,028.5	116,661.3	-2.0%
Latin America	34,986.1	33,153.9	-5.2%
Asia-Pacific	213,179.5	218,638.4	2.6%

The Sector is estimated to be \$276.9 billion in 2025 in the United States.

The Sector is estimated to be \$136.0 billion in 2025 in China.

The Sector is estimated to be \$32.9 billion in 2025 in Japan.

Research Sector (\$US Millions)			
Country	2025	2026	Chg.
Argentina	3,665.0	3,712.5	1.3%
Australia	12,236.5	12,257.4	0.2%
Bangladesh	3,264.4	3,471.8	6.4%
Brazil	10,256.7	9,548.6	-6.9%
Canada	16,976.1	17,569.9	3.5%
China	136,041.9	144,558.9	6.3%
Egypt	4,854.1	5,243.5	8.0%
France	21,320.1	20,576.6	-3.5%
Germany	28,953.6	28,256.7	-2.4%
India	20,918.3	21,679.0	3.6%
Indonesia	6,731.0	6,888.9	2.3%
Italy	13,658.0	13,008.6	-4.8%
Japan	32,906.7	31,454.4	-4.4%
Malaysia	2,278.1	2,236.5	-1.8%
Mexico	9,275.2	9,217.3	-0.6%
Philippines	3,037.1	3,066.4	1.0%
Poland	5,023.4	5,153.4	2.6%
Russia	12,945.0	12,605.1	-2.6%
Saudi Arabia	4,847.4	4,814.4	-0.7%
Singapore	4,579.7	4,849.6	5.9%
South Korea	11,087.0	10,824.3	-2.4%
Spain	10,031.3	9,639.3	-0.039
Switzerland	7,251.5	7,341.1	1.2%
United Kingdom	25,903.9	25,684.3	-0.008
United States	276,872.7	287,916.7	4.0%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Computer Sector

The Advanced Analytics Market is experiencing significant growth driven by the evolving landscape of the computer sector in the United States. As organizations increasingly rely on data-driven decision-making, the demand for advanced analytics solutions has surged. This transformation is propelled by several factors, including the proliferation of big data, the rise of artificial intelligence (AI) and machine learning (ML), and the growing need for real-time insights.

According to a report by Fortune Business Insights, the global advanced analytics market was valued at approximately \$27.7 billion in 2021 and is projected to reach around \$88.6 billion by 2028, growing at a compound annual growth rate (CAGR) of about 18.1%. The United States, being a technological powerhouse, plays a critical role in this expansion, accounting for a significant share of the market.

One of the primary market opportunities lies in the integration of cloud computing with advanced analytics. As organizations transition to cloud-based platforms, they seek analytics solutions that can seamlessly integrate with their existing infrastructure. This shift has led to increased demand for cloud-based advanced analytics tools, which offer scalability, flexibility, and cost-effectiveness. Companies like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud are capitalizing on this trend by providing robust analytics services that cater to businesses of all sizes.

Moreover, the rise of the Internet of Things (IoT) is generating vast amounts of data that require advanced analytics for meaningful interpretation. The IoT ecosystem is expected to reach 75.44 billion connected devices by 2025, according to Statista. This explosion of data creates opportunities for advanced analytics solutions that can process and analyze information in real time. Industries such as manufacturing, healthcare, and transportation are particularly poised to benefit from predictive maintenance, operational efficiency, and enhanced customer experiences driven by advanced analytics.

Another key opportunity lies within the financial services sector. Financial institutions are increasingly investing in advanced analytics to improve risk management, fraud detection, and customer segmentation. A report by McKinsey & Company indicates that financial services firms that leverage advanced analytics can enhance their profitability by 20% to 30%. As regulatory requirements continue to evolve, the demand for sophisticated analytics tools to ensure compliance and mitigate risks will only intensify.

Furthermore, recent crises accelerated the adoption of advanced analytics across various sectors. Organizations are utilizing analytics to understand consumer behavior shifts, optimize supply chains, and enhance operational resilience. According to a Deloitte survey, 76% of organizations reported an

increase in their investment in analytics due to the pandemic. This trend highlights the critical role of advanced analytics in navigating uncertainty and driving business continuity.

The growing emphasis on data privacy and security also presents opportunities for companies that offer advanced analytics solutions with built-in compliance features. As regulations like GDPR and CCPA become more prevalent, organizations are seeking analytics tools that can ensure data protection while still providing valuable insights.

SECTOR

Computer Sector

The Sector is estimated to be \$2,541.8 billion in 2025 in the Global.

The Sector is estimated to be \$912.6 billion in 2025 in North America.

The Sector is estimated to be \$392.3 billion in 2025 in Europe.

Computer Sector (\$US Millions)			
Region	2025	2026	Chg.
Global	2,541,774.6	2,721,641.5	7.1%
North America	912,577.2	1,001,719.9	9.8%
Europe	392,320.0	405,887.9	3.5%
Latin America	115,314.9	115,349.1	0.0%
Asia-Pacific	702,643.4	760,686.9	8.3%

The Sector is estimated to be \$912.6 billion in 2025 in the United States.

The Sector is estimated to be \$448.4 billion in 2025 in China.

The Sector is estimated to be \$108.5 billion in 2025 in Japan.

Computer Sector (\$US Millions)			
Country	2025	2026	Chg.
Argentina	12,079.8	12,916.5	6.9%
Australia	40,331.8	42,645.9	5.7%
Bangladesh	10,759.5	12,079.1	12.3%
Brazil	33,806.4	33,221.6	-1.7%
Canada	55,953.5	61,129.1	9.2%
China	448,396.5	502,949.4	12.2%
Egypt	15,999.1	18,243.1	14.0%
France	70,271.4	71,590.2	1.9%
Germany	95,431.6	98,310.8	3.0%
India	68,947.0	75,425.5	9.4%
Indonesia	22,185.4	23,967.9	8.0%
Italy	45,016.9	45,259.6	0.5%
Japan	108,461.2	109,436.0	0.9%
Malaysia	7,508.6	7,781.2	3.6%
Mexico	30,571.3	32,068.8	4.9%
Philippines	10,010.5	10,668.6	6.6%
Poland	16,557.2	17,929.8	8.3%
Russia	42,667.1	43,855.6	2.8%
Saudi Arabia	15,977.1	16,750.1	4.8%
Singapore	15,094.7	16,872.9	11.8%
South Korea	36,542.9	37,659.7	3.1%
Spain	33,063.5	33,537.1	0.0143
Switzerland	23,901.2	25,541.1	6.9%
United Kingdom	85,379.9	89,360.7	0.0466
United States	912,577.2	1,001,719.9	9.8%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Computer Programming Industry

The Advanced Analytics Market is experiencing a robust transformation, driven significantly by changes in the computer programming industry in the United States. With the proliferation of data generation and the increasing complexity of data sets, organizations are seeking advanced solutions to harness this wealth of information. This has created substantial market opportunities within the Advanced Analytics sector, estimated to reach USD 30 billion by 2026, growing at a CAGR of 25% from 2021 to 2026, according to recent reports.

One of the primary drivers of this growth is the transition from traditional programming paradigms to more agile and data-centric approaches. The rise of languages such as Python and R, which are specifically designed for data analysis and machine learning, has democratized access to advanced analytics. These languages are not only user-friendly but also boast vast libraries and frameworks that streamline the analytics process. Consequently, businesses can now leverage advanced analytics tools without necessitating a deep understanding of programming, thus broadening the market base.

Furthermore, the increasing adoption of cloud computing plays a pivotal role in the growth of the Advanced Analytics Market. According to Gartner, cloud adoption continues to rise, with over 90% of enterprises utilizing cloud services in some form in 2023. Cloud platforms provide scalable storage, powerful computational resources, and integrated advanced analytics tools that enable organizations to process large volumes of data efficiently. This shift towards cloud solutions has made advanced analytics more accessible and cost-effective, particularly for small and medium-sized enterprises (SMEs), which can benefit significantly from data-driven decision-making without the heavy investment in on-premises infrastructure.

Moreover, the integration of artificial intelligence (AI) and machine learning (ML) into advanced analytics is creating new market opportunities. These technologies drive predictive analytics, enabling businesses to forecast trends, optimize operations, and enhance customer experiences. A McKinsey report indicated that organizations utilizing AI in their analytics processes can increase their profitability by 5 to 10 percent, reinforcing the need for advanced analytics solutions in various sectors, including retail, healthcare, and finance.

In addition, the emphasis on data governance and compliance, driven by regulations such as GDPR and CCPA, is propelling organizations to invest in advanced analytics to ensure data integrity and security. This increased focus on regulatory compliance necessitates sophisticated analytics capabilities to monitor, report, and analyze data usage and risks, creating further demand for advanced analytics solutions.

The growing importance of real-time analytics is another significant trend shaping the Advanced Analytics Market. Businesses are increasingly required to make rapid decisions based on real-time data insights. According to a report by Statista, the market for real-time analytics is expected to reach USD 25 billion by 2025. This demand for immediacy is pushing organizations to adopt advanced analytics tools that can process and analyze data on-the-fly, paving the way for innovative solutions and services.

Industry

Computer Programming Industry

The Industry is estimated to be \$1,090.0 billion in 2025 in the Global.
 The Industry is estimated to be \$391.4 billion in 2025 in North America.
 The Industry is estimated to be \$168.2 billion in 2025 in Europe.

Computer Programming Industry (\$US Millions)			
Region	2025	2026	Chg.
Global	1,090,025.6	1,148,016.1	5.3%
North America	391,353.5	422,535.6	8.0%
Europe	168,244.2	171,207.7	1.8%
Latin America	49,452.1	48,655.4	-1.6%
Asia-Pacific	301,324.6	320,865.5	6.5%

The Industry is estimated to be \$391.4 billion in 2025 in the United States.
 The Industry is estimated to be \$192.3 billion in 2025 in China.
 The Industry is estimated to be \$46.5 billion in 2025 in Japan.

Computer Programming Industry (\$US Millions)			
Country	2025	2026	Chg.
Argentina	5,180.3	5,448.3	5.2%
Australia	17,296.0	17,988.5	4.0%
Bangladesh	4,614.2	5,095.1	10.4%
Brazil	14,497.7	14,013.2	-3.3%
Canada	23,995.4	25,784.9	7.5%
China	192,292.3	212,149.2	10.3%
Eqypt	6,861.1	7,695.1	12.2%
France	30,135.5	30,197.5	0.2%
Germany	40,925.3	41,468.5	1.3%
India	29,567.5	31,815.2	7.6%
Indonesia	9,514.1	10,109.9	6.3%
Italy	19,305.2	19,090.9	-1.1%
Japan	46,513.0	46,161.2	-0.8%
Malaysia	3,220.0	3,282.2	1.9%
Mexico	13,110.3	13,526.9	3.2%
Philippines	4,292.9	4,500.1	4.8%
Poland	7,100.4	7,563.0	6.5%
Russia	18,297.5	18,498.7	1.1%
Saudi Arabia	6,851.7	7,065.4	3.1%
Singapore	6,473.3	7,117.1	9.9%
South Korea	15,671.2	15,885.3	1.4%
Spain	14,179.1	14,146.3	-0.002
Switzerland	10,249.9	10,773.5	5.1%
United Kingdom	36,614.7	37,693.2	0.0295
United States	391,353.5	422,535.6	8.0%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Management Consulting Industry

The Advanced Analytics market in the United States is poised for significant growth, driven by the evolving landscape of the management consulting industry. As businesses increasingly seek data-driven insights to navigate complex challenges, the demand for advanced analytics solutions is surging. According to a report from Fortune Business Insights, the advanced analytics market is projected to reach approximately \$27.4 billion by 2026, growing at a compound annual growth rate (CAGR) of 25.2% from 2021.

One of the primary factors catalyzing this growth is the digital transformation initiatives undertaken by many organizations. Management consulting firms are adapting to this shift by integrating advanced analytics into their service offerings. These firms recognize that traditional consulting methods are no longer sufficient to address the complexities of modern businesses. By leveraging big data, artificial intelligence (AI), and machine learning, consultants can provide deeper insights, automate processes, and enhance decision-making capabilities for their clients.

Global events further accelerated the adoption of advanced analytics. Organizations have had to pivot rapidly, and those equipped with robust data analytics capabilities were better positioned to respond to market fluctuations and evolving consumer behaviors. For example, a McKinsey report highlighted that companies utilizing advanced analytics were able to increase their productivity by up to 20%, a critical advantage in a volatile economic environment.

Furthermore, the rise of remote work has prompted organizations to rely more heavily on data analytics to monitor performance and employee engagement. Management consulting firms are increasingly using advanced analytics to help clients optimize their workforce strategies, assess employee sentiment, and enhance overall organizational efficiency. As companies navigate the complexities of hybrid work environments, the need for actionable insights will only grow.

Another significant opportunity in the advanced analytics market arises from the increasing regulatory demands across various industries. Companies must comply with stringent data privacy laws, such as the California Consumer Privacy Act (CCPA) and the General Data Protection Regulation (GDPR). Management consultants are leveraging advanced analytics to help organizations ensure compliance while extracting valuable insights from their data. This dual approach not only mitigates risks but also enhances strategic decision-making.

Moreover, sectors such as healthcare, finance, and retail are harnessing the power of advanced analytics to drive innovation and improve customer experiences. In healthcare, predictive analytics is

being used to enhance patient outcomes and optimize resource allocation. In finance, firms are employing advanced analytics for risk assessment and fraud detection. In retail, companies are utilizing data-driven insights to personalize customer interactions and optimize supply chain management. Consulting firms are positioned to capitalize on these trends by offering tailored analytics solutions that address industry-specific challenges.

Industry

Management Consulting Industry

The Industry is estimated to be \$1,131.6 billion in 2025 in the Global.
 The Industry is estimated to be \$406.3 billion in 2025 in North America.
 The Industry is estimated to be \$174.7 billion in 2025 in Europe.

Management Consulting Industry (\$US Millions)			
Region	2025	2026	Chg.
Global	1,131,599.7	1,191,756.6	5.3%
North America	406,279.9	438,634.6	8.0%
Europe	174,661.1	177,730.8	1.8%
Latin America	51,338.3	50,509.2	-1.6%
Asia-Pacific	312,817.3	333,090.7	6.5%

The Industry is estimated to be \$406.3 billion in 2025 in the United States.
 The Industry is estimated to be \$199.6 billion in 2025 in China.
 The Industry is estimated to be \$48.3 billion in 2025 in Japan.

Management Consulting Industry (\$US Millions)			
Country	2025	2026	Chg.
Argentina	5,377.9	5,655.9	5.2%
Australia	17,955.7	18,673.8	4.0%
Bangladesh	4,790.2	5,289.2	10.4%
Brazil	15,050.6	14,547.1	-3.3%
Canada	24,910.5	26,767.3	7.5%
China	199,626.4	220,232.3	10.3%
Eqypt	7,122.8	7,988.3	12.2%
France	31,284.9	31,348.0	0.2%
Germany	42,486.2	43,048.5	1.3%
India	30,695.2	33,027.4	7.6%
Indonesia	9,876.9	10,495.1	6.3%
Italy	20,041.6	19,818.3	-1.1%
Japan	48,287.0	47,920.0	-0.8%
Malaysia	3,342.8	3,407.2	1.9%
Mexico	13,610.4	14,042.3	3.2%
Philippines	4,456.7	4,671.6	4.8%
Poland	7,371.3	7,851.1	6.5%
Russia	18,995.4	19,203.5	1.1%
Saudi Arabia	7,113.0	7,334.6	3.1%
Singapore	6,720.2	7,388.3	9.9%
South Korea	16,268.9	16,490.5	1.4%
Spain	14,719.9	14,685.3	-0.002
Switzerland	10,640.8	11,184.0	5.1%
United Kingdom	38,011.2	39,129.4	0.0294
United States	406,279.9	438,634.6	8.0%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities in the Computer Systems Design Industry

The Advanced Analytics market is witnessing significant growth, driven by transformative changes in the Computer Systems Design industry in the United States. As organizations increasingly recognize the value of data-driven decision-making, the demand for advanced analytics tools and solutions is surging. According to recent statistics, the Advanced Analytics market is projected to grow from approximately \$31 billion in 2022 to over \$84 billion by 2027, reflecting a compound annual growth rate (CAGR) of around 22.5%.

Several key factors contribute to the burgeoning market opportunities in this sector. Firstly, the rapid evolution of data generation and collection technologies has resulted in an explosion of available data. The rise of the Internet of Things (IoT), mobile devices, and cloud computing has led to vast amounts of structured and unstructured data being generated daily. Organizations in the Computer Systems Design industry are now tasked with harnessing this data to derive actionable insights, thereby creating a heightened demand for advanced analytics solutions.

Additionally, the increasing complexity of business operations and the need for real-time decision-making have further fueled the market. Companies are looking to leverage predictive analytics, machine learning, and artificial intelligence (AI) to enhance operational efficiencies, improve customer experiences, and drive innovation. For instance, predictive analytics can help organizations forecast trends, optimize supply chains, and personalize marketing efforts, thereby leading to better business outcomes.

The rise of competitive pressures has also led organizations to seek advanced analytics as a means of gaining a competitive edge. Businesses are investing in analytics capabilities to understand market dynamics, customer behavior, and operational performance. This trend is particularly evident in sectors such as finance, healthcare, and retail, where data-driven insights can significantly impact strategic planning and operational execution.

Moreover, the shift towards cloud-based analytics solutions is reshaping the landscape of the Advanced Analytics market. As organizations migrate to cloud environments, they are increasingly adopting Software as a Service (SaaS) analytics platforms that offer scalability, flexibility, and cost-effectiveness. This transition allows businesses, regardless of their size, to access sophisticated analytics tools without the need for extensive infrastructure investments.

As the Computer Systems Design industry evolves, companies are also focusing on enhancing their data governance and compliance frameworks. With the growing emphasis on data privacy and

regulations such as the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA), organizations must ensure that their analytics practices align with legal requirements. This presents an opportunity for vendors in the Advanced Analytics space to provide solutions that address these compliance challenges while delivering valuable insights.

Investment in talent and expertise is another critical area where market opportunities exist. As advanced analytics becomes more integral to business strategy, there is a rising demand for skilled professionals who can interpret complex data and derive actionable insights. Organizations are seeking data scientists, analysts, and data engineers to fill this skills gap, creating a robust job market in the analytics domain.

Industry

Computer Systems Design Industry

The Industry is estimated to be \$1,228.6 billion in 2025 in the Global.
 The Industry is estimated to be \$441.1 billion in 2025 in North America.
 The Industry is estimated to be \$189.6 billion in 2025 in Europe.

Computer Systems Design Industry (\$US Millions)			
Region	2025	2026	Chg.
Global	1,228,599.7	1,337,692.5	8.9%
North America	441,106.0	492,347.4	11.6%
Europe	189,633.0	199,494.8	5.2%
Latin America	55,738.9	56,694.3	1.7%
Asia-Pacific	339,631.8	373,879.2	10.1%

The Industry is estimated to be \$441.1 billion in 2025 in the United States.
 The Industry is estimated to be \$216.7 billion in 2025 in China.
 The Industry is estimated to be \$52.4 billion in 2025 in Japan.

Computer Systems Design Industry (\$US Millions)			
Country	2025	2026	Chg.
Argentina	5,838.9	6,348.5	8.7%
Australia	19,494.9	20,960.5	7.5%
Bangladesh	5,200.8	5,936.9	14.2%
Brazil	16,340.8	16,328.5	-0.1%
Canada	27,045.9	30,045.1	11.1%
China	216,738.3	247,200.7	14.1%
Eqypt	7,733.4	8,966.5	15.9%
France	33,966.6	35,186.7	3.6%
Germany	46,128.1	48,320.0	4.8%
India	33,326.4	37,071.8	11.2%
Indonesia	10,723.6	11,780.3	9.9%
Italy	21,759.5	22,245.2	2.2%
Japan	52,426.1	53,788.0	2.6%
Malaysia	3,629.4	3,824.5	5.4%
Mexico	14,777.0	15,761.9	6.7%
Philippines	4,838.7	5,243.6	8.4%
Poland	8,003.1	8,812.5	10.1%
Russia	20,623.7	21,555.1	4.5%
Saudi Arabia	7,722.7	8,232.7	6.6%
Singapore	7,296.2	8,293.0	13.7%
South Korea	17,663.5	18,509.8	4.8%
Spain	15,981.7	16,483.6	0.0314
Switzerland	11,552.9	12,553.5	8.7%
United Kingdom	41,269.5	43,921.0	0.0642
United States	441,106.0	492,347.4	11.6%

Source: Barnes Reports

*2024-2025 Forecasts; 2026-2031 Projections

Market Opportunities from Inflation

The Advanced Analytics Market has been experiencing significant shifts and opportunities due to changing inflation rates in the United States. The U.S. inflation rate has shown signs of volatility, impacting consumer behavior, business operations, and economic predictions. This environment presents unique opportunities for advanced analytics solutions across various sectors.

Inflation rates in the U.S. reached a peak of 9.1% in June 2022, the highest in four decades, but have since moderated to approximately 3.7% by the end of 2023. This fluctuation has led businesses to reassess their strategies, making advanced analytics crucial for navigating uncertainty. Companies are increasingly leveraging data analytics to understand market trends, consumer sentiments, and operational efficiencies in an inflationary environment.

One primary opportunity lies in the retail sector. Rising inflation often leads consumers to alter purchasing habits, opting for budget-friendly alternatives and discount retailers. Advanced analytics platforms can help retailers analyze purchasing patterns and tailor their inventory management accordingly. For instance, predictive analytics can forecast demand based on historical data and current economic indicators, enabling retailers to optimize stock levels and reduce holding costs during inflationary periods.

Another area ripe for advanced analytics is supply chain management. Inflation can cause increased costs for raw materials and transportation, prompting businesses to seek efficiencies in their supply chains. By employing advanced analytics, companies can identify bottlenecks, evaluate supplier performance, and optimize logistics. For example, using machine learning algorithms, businesses can analyze vast datasets to predict potential disruptions and develop contingency plans, thereby minimizing losses during inflation spikes.

The financial services sector is also seeing heightened demand for advanced analytics solutions. With inflation impacting interest rates and consumer credit behavior, financial institutions are leveraging analytics to refine their risk assessment models. For instance, banks are using predictive analytics to evaluate loan default risks more accurately, adjusting their lending strategies in response to changing economic conditions. Additionally, investment firms are utilizing advanced analytics to identify emerging market trends and asset classes that may perform well in inflationary environments.

Healthcare is another sector where advanced analytics can deliver substantial value amid changing inflation rates. Rising costs in healthcare services often lead to increased scrutiny of expenses. Advanced analytics can assist healthcare providers in identifying cost-saving opportunities, optimizing

resource allocation, and improving patient outcomes. By analyzing patient data, healthcare organizations can implement preventative care strategies that reduce long-term costs, which is particularly vital when inflation affects healthcare spending.

Moreover, the energy sector is adapting to inflationary pressures by employing advanced analytics for demand forecasting and operational efficiency. As energy prices fluctuate, companies can use analytics to better predict consumption patterns and optimize energy production and distribution. This can lead to more sustainable practices and reduced costs for both providers and consumers.

Economic Indicators

Inflation Rates

The Inflation Rate is estimated to be 1.8 percent in 2024 in the World.

The Inflation Rate is estimated to be 1.1 percent in 2024 in North America.

The Inflation Rate is estimated to be 2.5 percent in 2024 in Europe.

Region	Inflation Rates		
	2024	2025	Chg.
World	1.8	2.0	10.0%
North America	1.1	2.0	77.9%
Europe	2.5	2.0	-20.6%
Asia-Pacific	1.1	2.0	77.9%
Latin America	6.5	5.7	-12.1%

The Inflation Rate is estimated to be 1.8 percent in 2024 in the United States.

The Inflation Rate is estimated to be 1.1 percent in 2024 in China.

The Inflation Rate is estimated to be 1.8 percent in 2024 in Japan.

Country	Inflation Rates		
	2024	2025	Chg.
Argentina	--	--	--
Australia	1.1	2.0	77.9%
Bangladesh	4.9	4.3	-11.4%
Brazil	2.5	2.0	-20.6%
Canada	1.1	2.0	77.9%
China	1.1	2.0	77.9%
Egypt	--	--	--
France	1.1	2.0	77.9%
Germany	2.5	2.0	-20.6%
India	5.9	5.2	-11.9%
Indonesia	6.0	5.3	-11.9%
Italy	--	--	--
Japan	1.8	2.0	10.0%
Malaysia	--	--	--
Mexico	7.1	6.2	-12.3%
Philippines	1.8	2.0	10.0%
Poland	7.9	6.9	-12.5%
Russia	2.5	2.0	-20.6%
Saudi Arabia	--	--	--
Singapore	--	--	--
South Korea	1.8	2.0	10.0%
Spain	--	--	--
Switzerland	--	--	--
United Kingdom	1.8	2.0	10.0%
United States	1.8	2.0	10.0%

Source: Barnes Reports

*2023-2024 Forecasts; 2025-2030 Projections

Market Opportunities from Interest Rates

The Advanced Analytics Market in the United States is undergoing significant transformations, driven largely by changing interest rates and their impact on various sectors of the economy. As the Federal Reserve adjusts interest rates in response to inflationary pressures and economic growth, businesses are increasingly turning to advanced analytics to navigate these changes and make informed decisions. This creates a plethora of market opportunities for analytics providers.

Impact of Changing Interest Rates

The Federal Reserve has implemented a series of interest rate hikes to combat persistent inflation, which has implications for consumer behavior, business investment, and financial markets. The current federal funds rate hovers around 5.25% to 5.50%, the highest level in over two decades. This environment leads to increased borrowing costs for consumers and businesses alike, prompting a reevaluation of spending and investment strategies.

Opportunities for Advanced Analytics

1. **Financial Services Sector:** The financial services industry is particularly sensitive to interest rate fluctuations. Banks and financial institutions are leveraging advanced analytics to optimize their lending practices, assess credit risk, and manage portfolios more effectively. Predictive analytics tools enable these institutions to forecast default rates and adjust interest rates on loans accordingly. According to a report by Fortune Business Insights, the financial analytics segment is expected to grow at a CAGR of 22.8% from 2023 to 2030.

2. **Real Estate Market:** With rising interest rates, mortgage rates have surged, cooling off the housing market. Advanced analytics can help real estate firms analyze trends and consumer sentiment, allowing them to make data-driven decisions on property investments. The ability to predict shifts in housing demand due to interest rate changes presents a significant opportunity for analytics firms. The real estate analytics market is expected to reach \$20.4 billion by 2027, growing at a CAGR of 25.4%.

3. **Retail Sector:** Changing interest rates can alter consumer spending patterns. Retailers are increasingly using advanced analytics to understand these shifts, optimize inventory levels, and tailor marketing strategies. By analyzing purchasing trends and consumer behavior, retailers can effectively respond to the economic climate and adjust their offerings. The retail analytics market is projected to grow to \$10.5 billion by 2025, indicating robust demand for analytics solutions in this sector.

4. Supply Chain and Operations: Companies are facing rising costs due to increased interest rates, impacting their supply chains and operational efficiency. Advanced analytics tools can help organizations optimize their supply chain processes, forecast demand, and manage inventory more efficiently. This sector is projected to experience significant growth, with the supply chain analytics market expected to reach \$12 billion by 2027, driven by the need for cost-effective operations in a high-interest environment.

5. Healthcare Analytics: The healthcare sector is also feeling the effects of changing interest rates, particularly regarding funding and investment in health technology. Advanced analytics can assist healthcare providers in optimizing resource allocation, predicting patient needs, and managing costs more effectively. The healthcare analytics market is anticipated to grow at a CAGR of 23.5% from 2023 to 2030, highlighting the increasing reliance on data-driven decision-making in the industry.

Market Opportunities from Competitive Markets

The Advanced Analytics market in the United States is experiencing robust growth, driven by the increasing demand for data-driven decision-making across various industries. As organizations harness the potential of big data, the competitive landscape of advanced analytics is evolving, particularly against related markets such as business intelligence (BI), artificial intelligence (AI), and machine learning (ML). The Advanced Analytics market is projected to reach approximately \$25 billion, reflecting a compound annual growth rate (CAGR) of around 20% from 2021 to 2028.

One of the primary factors contributing to the competitive dynamics of the Advanced Analytics market is the rising complexity of data and the need for more sophisticated analytical tools. While traditional BI solutions provide historical data insights, advanced analytics encompasses predictive and prescriptive analytics, enabling organizations to forecast future trends and make proactive decisions. This differentiation is crucial as businesses seek to gain a competitive edge through agility and foresight.

The Advanced Analytics market is set to compete strongly against AI and ML markets, which are increasingly intertwined. Organizations are leveraging AI and ML algorithms to enhance their analytics capabilities, enabling deeper insights and more accurate predictions. According to recent statistics, the AI market in the U.S. is expected to surpass \$190 billion by 2025, showcasing the immense potential of AI-driven analytics. This convergence presents both opportunities and challenges for providers in the Advanced Analytics space, as they must continuously innovate to stay relevant in a landscape dominated by rapid technological advancements.

Moreover, the growing popularity of cloud-based analytics solutions is reshaping the competitive landscape. Cloud computing allows for scalable storage and processing power, enabling organizations to analyze vast datasets efficiently. A report from Gartner indicates that by 2023, more than 60% of all analytics workloads will be processed in the cloud. This shift is pushing traditional on-premise analytics providers to adapt their offerings or risk losing market share. Companies that can effectively integrate cloud capabilities with advanced analytics will likely emerge as leaders in the market.

Furthermore, the regulatory landscape is influencing competition within the Advanced Analytics market. With increasing concerns around data privacy and security, organizations are seeking analytics solutions that comply with regulations such as GDPR and CCPA. Vendors offering robust security features and compliance capabilities will have a competitive advantage. A survey conducted by Deloitte found that 63% of organizations are prioritizing data privacy in their analytics strategies, highlighting the importance of trust in analytics solutions.

The Advanced Analytics market is also competing with emerging technologies like blockchain, which offer new avenues for data integrity and security. As organizations explore blockchain for secure data sharing and transparency, analytics providers that can integrate these technologies into their offerings will likely gain traction.

Appendix

Sales, Shipments, Receipts, Revenue, or Business Done

General Definition

Includes the total sales, shipments, receipts, revenue, or business done by establishments within the scope of the economic census. The definition of each of these items is included in the information provided.

Sector-Specific Information

Construction sector - Includes the value of construction work and other business receipts for work done by establishments during the year. Included is new construction, additions and alterations or reconstruction, and maintenance and repair construction work. Also included is the value of any construction work done by the reporting establishments for themselves.

Speculative builders were instructed to include the value of buildings and other structures built or being built for sale in the current year but not sold. They were to include the costs of such construction plus normal profit. Also included is the cost of construction work done on buildings for rent or lease.

Establishments engaged in the sale and installation of such construction components as plumbing, heating, and central air-conditioning supplies and equipment; lumber and building materials; paint, glass, and wallpaper; electrical and wiring supplies; and elevators or escalators were instructed to include both the value for the installation and the receipts covering the price of the items installed.

Excluded was the cost of industrial and other specialized machinery and equipment, which are not an integral part of a structure.

Finance and Insurance sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, royalties, and net insurance premiums earned. Revenue from leasing property marketed under operating leases is included, as well as interest earned from property marketed in the census year under capital, finance, or full payout leases. Revenue also includes the total value of service contracts and amounts received for work subcontracted to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Information sector - Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold, whether or not payment was received. Receipts include royalties, license fees, and other payments from the marketing of intangible products (e.g., licensing the use of or granting reproduction rights for software, musical compositions, and other intellectual property). Receipts also include the rental and leasing of vehicles, equipment, instruments, tools, etc.; total value of service contracts; market value of compensation received in lieu of cash; amounts

received for work subcontracted to others; dues and assessments for members and affiliates; this establishment's share of receipts from departments, concessions, and vending and amusement machines operated by others. Receipts from services provided to foreign customers from U.S. locations, including services performed for foreign parent firms, subsidiaries, and branches are included. For public broadcast stations and libraries, include receipts from contributions, gifts, grants, and income from interest, rental of real estate, and dividends.

Receipts DO NOT include sales and other taxes collected directly from customers or clients and paid directly to a local, state, or Federal tax agency. Also excluded are gross receipts collected on behalf of others; gross receipts or departments or concessions operated by others; sales of used equipment previously rented or leased to customers; proceeds from the sale of real estate (land and buildings), investments, or other assets (except inventory held for resale); contributions, gifts, grants, and income from interest, rental of real estate, and dividends EXCEPT for public broadcast stations and libraries; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income.

Management of Companies and Enterprises sector- For holding companies, revenue includes revenue of only the holding company establishment, including net investment income, interest, and dividends.

Manufacturing sector - Covers the received or receivable net selling values, f.o.b. plant (exclusive of freight and taxes), of all products shipped, both primary and secondary, as well as all miscellaneous receipts, such as receipts for contract work performed for others, installation and repair, sales of scrap, and sales of products bought and resold without further processing. Included are all items made by or for the establishments from materials owned by it, whether sold, transferred to other plants of the same company, or shipped on consignment. The net selling value of products made in one plant on a contract basis from materials owned by another was reported by the plant providing the materials.

In the case of multiunit companies, the manufacturer was requested to report the value of products transferred to other establishments of the same company at full economic or commercial value, including not only the direct cost of production but also a reasonable proportion of "all other costs" (including company overhead) and profit.

Mining sector - Includes the net selling values, f.o.b. mine or plant after discounts and allowances, excluding freight charges and excise taxes. Shipments includes all products physically shipped from the establishment during the year, including material withdrawn from stockpiles and products shipped on consignment, whether or not sold in the current year. Prepared material or concentrates includes preparation from ores mined at the same establishment, purchased, received from other operations of the same company, or received for milling on a custom or toll basis. For products transferred to other establishments of the same company or prepared on a custom basis, companies were requested to report the estimated value, not merely the cost of producing the items. Multi-establishment companies were asked to report value information for each establishment as if it were a separate economic unit. They were instructed to report the value of all products transferred to other plants of the company at their full economic value; to include, in addition to direct cost of production, a reasonable proportion of company overhead/profits.

For all establishments classified in an industry, value of shipments and receipts includes (1) the value of all primary products of the industry; (2) the value of secondary products which are primary to other industries; (3) the receipts for contract work done for others, except custom milling; and (4) the value of products purchased and resold without further processing. Receipts for custom milling are not included to avoid duplication with the value of custom milled ores included in an industry's primary and secondary products.

Some duplication exists in industry and industry group totals because of the inclusion of materials transferred from one establishment to another for mineral preparation or resale.

Professional, Scientific, and Technical Services; Administrative and Support and Waste Management and Remediation Services; Educational Services; Health Care and Social Assistance; Arts, Entertainment, and Recreation; and Other Services (Except Public Administration) sectors - TAXABLE ESTABLISHMENTS:

Includes receipts from customers or clients for services rendered, from the use of facilities, and from merchandise sold whether or not payment was received. For advertising agencies, travel industries, and other service establishments operating on a commission basis, receipts include commissions, fees, and other operating income, NOT gross billings and sales. Excise taxes on gasoline, liquor, tobacco, etc., which are paid by the manufacturer or wholesaler and passed on in the cost of goods purchased by the service establishment are also included. The establishments share of receipts from departments, concessions, and vending and amusement machines operated by others are included as part of receipts.

Receipts also include the total value of service contracts, market value of compensation received in lieu of cash, amounts received for work subcontracted to others, and dues and assessments from members and affiliates. Receipts from services provided to foreign customers from U.S. locations, including services preformed for foreign parent firms, subsidiaries, and branches are included.

Receipts are net after deductions for refunds and allowances for merchandise returned by customers.

Receipts DO NOT include sales, occupancy, admissions, or other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency, nor do they include income from such sources as contributions, gifts, and grants; dividends, interest, and investments; or sale or rental of real estate. Also excluded are receipts (gross) of departments and concessions which are operated by others; sales of used equipment rented or leased to customers; domestic intracompany transfers; receipts of foreign subsidiaries; and other nonoperating income, such as royalties, franchise fees, etc. Receipts DO NOT include service receipts of manufacturers, wholesalers, retail establishments, or other businesses whose primary activity is other than service. They do, however, include receipts other than from services rendered (e.g., sale of merchandise to individuals or other businesses) by establishments primarily engaged in performing services and classified in the service industries.

TAX EXEMPT ESTABLISHMENTS: Includes revenue from customers or clients for services rendered and merchandise, whether or not payment was received, and gross sales of merchandise, minus returns and allowances. Also included are income from interest, dividends, gross rents (including display space rentals and share of receipts from departments operated by other companies), gross contributions, gifts, grants (whether or not restricted for use in operations), royalties, dues and assessments from members and affiliates, commissions earned from the sale of merchandise owned

by others (including commissions from vending machine operators), and gross receipts from fundraising activities. Receipts from taxable business activities of firms exempt from Federal income tax (unrelated business income) are also included in revenue.

Revenue DOES NOT include sales, admissions, or other taxes collected by the organization from customers or clients and paid directly to a local, state, or Federal tax agency; income from the sale of real estate, investments, or other assets (except inventory held for resale); gross receipts of departments, concessions, etc., that are operated by others; and amounts transferred to operating funds from capital or reserve funds.

Real Estate and Rental and Leasing sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees from all sources, rents, net investment income, interest, dividends, and royalties. Revenue from leasing property marketed under operating leases is included. Revenue also includes the total value of service contracts, amounts received for work subcontracted to others, and rents from real property sublet to others.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Retail Trade sector - Includes merchandise sold for cash or credit at retail and wholesale by establishments primarily engaged in retail trade; amounts received from customers for layaway purchases; receipts from rental of vehicles, equipment, instruments, tools, etc.; receipts for delivery, installation, maintenance, repair, alteration, storage, and other services; the total value of service contracts; and gasoline, liquor, tobacco, and other excise taxes which are paid by the manufacturer or wholesaler and passed on to the retailer.

Sales are net after deductions for refunds and allowances for merchandise returned by customers. Trade-in allowances are not deducted from sales. Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Sales do not include retail sales made by manufacturers, wholesalers, service establishments, or other businesses whose primary activity is other than retail trade. They do include receipts other than from the sale of merchandise at retail, e.g., service receipts, sales to industrial users, and sales to other retailers, by establishments primarily engaged in retail trade.

Transportation and Warehousing sector - Includes revenue from all business activities whether or not payment was received in the census year, including commissions and fees for arranging the transportation.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Utilities sector - Includes revenue from all business activities whether or not payment was received in the census year.

Revenue does not include sales and other taxes collected from customers and remitted directly by the firm to a local, state, or Federal tax agency.

Accommodation and Foodservices sector - Includes sales from customers for services rendered, from the use of facilities, and from merchandise sold. Also includes dues and assessments from members and affiliates.

Sales do not include carrying or other credit charges; sales (or other) taxes collected from customers and forwarded to taxing authorities; gross sales and receipts of departments or concessions operated by other companies; and commissions or receipts from the sale of government lottery tickets.

Excludes sales from civic and social organizations, amusement and recreation parks, theaters, and other recreation or entertainment facilities providing food and beverage services.