

Audience Analytics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 102 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Audience Analytics Market Analysis

The audience analytics market stands at USD 5.14 billion in 2025 and is expected to reach USD 8.78 billion by 2030, advancing at an 11.3% CAGR. Heightened demand for consent-based identity resolution, powerful AI toolkits, and the rapid monetisation of first-party data in retail media networks underpin this expansion. Organisations increasingly deploy real-time, edge-based analytics that protect privacy while generating actionable insights at the point of engagement. Solutions remain the largest revenue contributor, yet cloud-native services record the quickest growth as firms seek scalability and cost optimisation. Meanwhile, large enterprises dominate spending, but small and medium enterprises accelerate adoption thanks to no-code interfaces and consumption-based pricing models that lower entry barriers to sophisticated analytics.

Global Audience Analytics Market Trends and Insights

Rapid Growth in Omnichannel First-Party Data Collection

Brands are rebuilding data architectures around owned interaction points, integrating in-store behaviour, mobile engagement, and connected-device signals. Retailers now operate sophisticated media networks that align physical and digital journeys, opening USD-level revenue channels once dominated by third-party data brokers. The ability to merge offline and online insights improves lifetime value modelling and elevates segmentation precision.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

Surging Adoption of AI/ML-Powered Predictive Analytics

Machine-learning algorithms now underpin behavioural modelling, conversion prediction, and automated cohort creation across mainstream platforms. Google Analytics 4 and Adobe Experience Cloud showcase AI engines that slash insight latency from weeks to minutes while improving forecast accuracy by more than 30%. Cloud delivery makes these functions accessible to mid-market firms previously constrained by infrastructure costs and talent shortages.

Increasing Privacy-First Regulation

GDPR, CPRA, and the Digital Markets Act compel firms to re-engineer data flows, often diverting 15-20% of analytics budgets to compliance efforts. Privacy-preserving solutions, such as cookieless web analytics, reduce dependence on personal identifiers while sustaining behavioural insight quality. Vendors tout contextual targeting and edge processing to balance regulatory demands with commercial goals.

Other drivers and restraints analyzed in the detailed report include:

Media and Entertainment Shift to Real-Time Audience Monetisation / Cookieless Marketing Pushes Demand for Consent-Based Identity Graphs / Data-Engineering Skill Shortages Among SME Users /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Solutions generated 67.8% of 2024 revenue and remain the backbone of the audience analytics market. They comprise data-integration hubs, customer data platforms, and AI inference engines that enable cross-channel insight generation. Organisations invest heavily at the outset in scalable infrastructures, creating high switching costs and entrenched vendor relationships. Services, however, achieve a 12.7% CAGR as firms outsource expertise in identity resolution, model governance, and compliance auditing. Managed offerings deliver continuous optimisation and bridge the data-engineering talent gap, elevating overall project success rates.

The rise of analytics-as-a-service signals a strategic shift from perpetual licences to consumption-based engagements. Consultancies and system integrators package technology stacks with advisory support, ensuring business objectives drive implementation choices. As privacy regulation tightens, specialised services in consent management and edge deployment command premium pricing, accelerating the revenue mix transition toward recurring professional support.

On-premises systems held 65.8% of the audience analytics market share in 2024, reflecting enduring concerns over data sovereignty and latency for high-volume streaming analyses. Sectors such as banking and government rely on self-hosted platforms to retain sensitive personally identifiable information. Nevertheless, cloud instances grow at a 13.1% CAGR as vendors implement region-specific encryption, sovereign-cloud options, and advanced compliance certifications. Adobe's joint offering with AWS exemplifies tailored cloud solutions for real-time customer profiling.

Hybrid architectures surface as the prevailing model, retaining golden customer profiles on-premises while bursting compute-intensive workloads to the cloud. This arrangement curbs infrastructure capital expenditure and unlocks elastic processing for seasonal campaigns and sudden surges in data ingestion. The audience analytics market size represented by cloud deployments is forecast to overtake on-premises revenue in the post-2030 horizon as confidence in public-cloud security matures.

The Audience Analytics Market Report is Segmented by Component (Solutions and Services), Deployment Mode (On-Premises and

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Cloud), Organization Size (Large Enterprises and Small and Medium Enterprises (SMEs)), Application (Sales and Marketing Optimisation, Customer Experience Management, and More), End-User Industry (Media and Entertainment, Retail and ECommerce, and More), and Geography.

Geography Analysis

North America held 40.3% revenue in 2024, anchored by a sophisticated advertising ecosystem, heavy technology investment, and early adoption of privacy-first tools. United States retailers such as Walmart and Target lead in retail media revenue generation, while Canada benefits from progressive privacy laws that nudge firms toward compliant analytics architectures. Mexico's accelerating e-commerce adoption widens the regional user base for scalable, cloud-delivered insight engines.

Europe sits in a steady growth phase shaped by GDPR and the Digital Markets Act, which elevate demand for consent-based solutions that minimise personal data dependence. Germany and the United Kingdom endorse edge-processing pilots that keep data resident, reducing cross-border transfer complexity. France and Italy explore contextual targeting to maintain advertising efficiency. Independent vendors that can interoperate across multiple identity frameworks attract mid-market adopters seeking flexible compliance.

Asia-Pacific is the fastest-growing region at a 12.2% CAGR, supported by a USD 880 billion mobile economy and 1.8 billion mobile subscribers. China pioneers social commerce analytics that blend video, messaging, and payments, creating granular, real-time insight streams. India's fintech boom expands transactional datasets, while Japan and South Korea integrate audience analytics into gaming ecosystems to optimise retention. Australia and New Zealand embrace enterprise analytics to support omnichannel retail and public-service modernisation. Rising smartphone penetration and government digital initiatives propel additional demand across Southeast Asia, reinforcing long-term momentum for the audience analytics market.

List of Companies Covered in this Report:

Adobe Inc. / Oracle Corporation / Google LLC / International Business Machines Corp. / comScore, Inc. / SAS Institute Inc. / Microsoft Corp. / Amazon Web Services, Inc. / Salesforce, Inc. / Nielsen Holdings Plc / JCDecaux Group / Akamai Technologies, Inc. / Cxense ASA / Meltwater / Audiense Ltd. / Upwave / Mixpanel, Inc. / Amplitude, Inc. / Chartbeat, Inc. / Piwik PRO /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2.1 Rapid growth in omnichannel first-party data collection
- 4.2.2 Surging adoption of AI/ML-powered predictive analytics
- 4.2.3 Media and entertainment shift to real-time audience monetisation
- 4.2.4 Cookieless marketing pushes demand for consent-based identity graphs
- 4.2.5 Retail media networks scaling first-party shopper insights
- 4.2.6 Edge analytics on devices enabling privacy-preserving insights
- 4.3 Market Restraints
 - 4.3.1 Increasing privacy-first regulation (GDPR, CPRA, DMA)
 - 4.3.2 Data-engineering skill shortages among SME users
 - 4.3.3 Rising cloud-compute costs for petabyte-scale analytics workloads
 - 4.3.4 Fragmentation of identity solutions hinders interoperability
- 4.4 Value Chain Analysis
- 4.5 Technological Outlook
- 4.6 Regulatory Landscape
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Intensity of Competitive Rivalry
- 4.8 Assessment of the Impact of Macroeconomic Trends on the Market

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Component
 - 5.1.1 Solutions
 - 5.1.2 Services
- 5.2 By Deployment Mode
 - 5.2.1 On-premises
 - 5.2.2 Cloud
- 5.3 By Organisation Size
 - 5.3.1 Large Enterprises
 - 5.3.2 Small and Medium Enterprises (SMEs)
- 5.4 By Application
 - 5.4.1 Sales and Marketing Optimisation
 - 5.4.2 Customer Experience Management
 - 5.4.3 Competitive/Media Intelligence
 - 5.4.4 Product and Content Development
 - 5.4.5 Fraud and Risk Analytics
- 5.5 By End-user Industry
 - 5.5.1 Media and Entertainment
 - 5.5.2 Retail and eCommerce
 - 5.5.3 BFSI
 - 5.5.4 Telecom and IT
 - 5.5.5 Healthcare and Life Sciences
 - 5.5.6 Government and Public Sector
 - 5.5.7 Others
- 5.6 By Geography

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.6.1 North America
 - 5.6.1.1 United States
 - 5.6.1.2 Canada
 - 5.6.1.3 Mexico
- 5.6.2 Europe
 - 5.6.2.1 Germany
 - 5.6.2.2 United Kingdom
 - 5.6.2.3 France
 - 5.6.2.4 Italy
 - 5.6.2.5 Spain
 - 5.6.2.6 Russia
 - 5.6.2.7 Rest of Europe
- 5.6.3 Asia-Pacific
 - 5.6.3.1 China
 - 5.6.3.2 Japan
 - 5.6.3.3 India
 - 5.6.3.4 South Korea
 - 5.6.3.5 Australia and New Zealand
 - 5.6.3.6 Rest of Asia-Pacific
- 5.6.4 South America
 - 5.6.4.1 Brazil
 - 5.6.4.2 Argentina
 - 5.6.4.3 Rest of South America
- 5.6.5 Middle East and Africa
 - 5.6.5.1 Middle East
 - 5.6.5.1.1 Saudi Arabia
 - 5.6.5.1.2 United Arab Emirates
 - 5.6.5.1.3 Turkey
 - 5.6.5.1.4 Rest of Middle East
 - 5.6.5.2 Africa
 - 5.6.5.2.1 South Africa
 - 5.6.5.2.2 Nigeria
 - 5.6.5.2.3 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share Analysis
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
 - 6.4.1 Adobe Inc.
 - 6.4.2 Oracle Corporation
 - 6.4.3 Google LLC
 - 6.4.4 International Business Machines Corp.
 - 6.4.5 comScore, Inc.
 - 6.4.6 SAS Institute Inc.
 - 6.4.7 Microsoft Corp.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.4.8 Amazon Web Services, Inc.
- 6.4.9 Salesforce, Inc.
- 6.4.10 Nielsen Holdings Plc
- 6.4.11 JCDecaux Group
- 6.4.12 Akamai Technologies, Inc.
- 6.4.13 Cxense ASA
- 6.4.14 Meltwater
- 6.4.15 Audiense Ltd.
- 6.4.16 Upwave
- 6.4.17 Mixpanel, Inc.
- 6.4.18 Amplitude, Inc.
- 6.4.19 Chartbeat, Inc.
- 6.4.20 Piwik PRO

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Audience Analytics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 102 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com