# TAM/SAM/SOM for proposition‑level, source‑attributing personal RAG

## Methodology

| Step | Approach |
| --- | --- |
| **TAM (Total Addressable Market)** | Top‑down estimation uses **knowledge‐worker employment** figures (defined as jobs where people create or analyse information). An ILO/UN policy brief (2023) counts **644–997 million** knowledge‑worker jobs globally (≈19.6–30.4 % of employment)[[1]](https://sdgs.un.org/sites/default/files/2023-05/B59%20-%20Berg%20-%20Automation%20hits%20the%20knowledge%20worker%20ChatGPT%20and%20the%20future%20of%20work.pdf#:~:text=occupations,ILO%2C%202023). The midpoint (**≈820.5 million**) is used as the TAM. Gartner’s estimate of **>100 M** U.S. knowledge workers and **>1 B** globally[[2]](https://www.usebraintrust.com/blog/knowledge-work-demand-index-july-2021#:~:text=Simply%20put%3A%20knowledge%20workers%20are,business%20in%20three%20major%20ways) provides corroboration. |
| **SAM (Serviceable Available Market)** | Bottom‑up enumeration of professions that rely on precise, span‑linked citations. U.S. counts were taken from Bureau of Labor Statistics (May 2023) for management analysts[[3]](https://www.bls.gov/oes/2023/May/oes131111.htm#:~:text=National%20estimates%20for%20Management%20Analysts%3A), market research analysts[[4]](https://www.bls.gov/oes/2023/may/oes131161.htm#:~:text=National%20estimates%20for%20Market%20Research,Analysts%20and%20Marketing%20Specialists), operations research analysts[[5]](https://www.bls.gov/oes/2023/may/oes152031.htm#:~:text=Geographic%20profile%20for%20Operations%20Research,Analysts), financial & investment analysts[[6]](https://www.bls.gov/oes/2023/may/oes132051.htm#:~:text=National%20estimates%20for%20Financial%20and,Investment%20Analysts), technical writers[[7]](https://www.bls.gov/oes/2023/may/oes273042.htm#:~:text=Geographic%20profile%20for%20Technical%20Writers). The American Bar Association reports **1,322,649 active U.S. lawyers** as of Jan 1 2024[[8]](https://www.americanbar.org/news/profile-legal-profession/demographics/#:~:text=There%20are%20more%20than%201,state%20and%20territory). The OECD counted **1,889,780 U.S. researchers** in 2021[[9]](https://www.ceicdata.com/en/united-states/number-of-researchers-and-personnel-on-research-and-development-oecd-member-annual/number-of-researchers-total#:~:text=United%20States%20Number%20of%20Researchers%3A,United%20States). Where global headcounts were unavailable, U.S. counts were scaled by market‑share assumptions based on industry revenues or population; these scaling assumptions are labelled **[Unverified]**. UNESCO notes there were **1,420 researchers per million people** worldwide in 2022[[10]](https://uis.unesco.org/en/news/Explore-latest-progress-on-SDG9.5-Research-Development-through-key-indicators-February2025#:~:text=Between%202015%20and%202022%2C%20the,at%20around91%20researchers%20per%20million); this yields ≈11.36 million global researchers. |
| **SOM (Serviceable Obtainable Market)** | Assumed **30 % adoption** of citation‑centric RAG among SAM professions (early adopters). Average‑revenue‑per‑user (ARPU) bands were anchored on subscription prices: low‑tier tools like Zotero or Elicit Lite (~$5/month or **$60/year**)[[11]](https://www.zotero.org/storage#:~:text=Individual%20Pricing)[[12]](https://support.elicit.com/en/articles/471617#:~:text=Elicit%20Plus%20is%20%2412%20per,120%20per%20year%20to%20subscribe), mid‑tier Elicit Plus (**$12/month = $120/year**)[[12]](https://support.elicit.com/en/articles/471617#:~:text=Elicit%20Plus%20is%20%2412%20per,120%20per%20year%20to%20subscribe), and premium tools like Perplexity Pro (**$20/month = $240/year**)[[13]](https://www.perplexity.ai/enterprise/pricing#:~:text=Get%20started%20for%20free)[[14]](https://techcrunch.com/2025/07/02/perplexity-launches-a-200-monthly-subscription-plan/#:~:text=Perplexity%20now%20offers%20a%20variety,Max%20plan%20for%20Enterprise%20customers). |

## Calculations

* **TAM:** Midpoint of 644–997 M knowledge workers ≈ **820.5 M**.
* **SAM:** Summing scaled global headcounts for lawyers, management consultants, market research analysts, operations researchers, financial analysts, technical writers and researchers produces **≈21.6 M** professionals. This is **2.6 %** of the TAM. Note that global lawyer and consultant headcounts are derived by dividing U.S. counts by estimated U.S. revenue shares (~30–40 %); these figures are **[Unverified]**.
* **SOM:** With a **30 % adoption rate**, around **6.48 M** professionals would adopt personal RAG tools.
* **Revenue Potential:** Multiplying SOM users by ARPU bands yields the following annual revenue bands:
* Low ARPU ($60/year): **≈$389 M**.
* Mid ARPU ($120/year): **≈$778 M**.
* High ARPU ($240/year): **≈$1.56 B**.

## Sensitivity

A ±25 % sensitivity analysis on TAM, SAM, adoption rate and ARPU shows revenue potential ranging from roughly **$0.29 B** (pessimistic: lower TAM, SAM and adoption, lowest ARPU) to **$2.4 B** (optimistic: higher TAM/SAM, adoption and premium ARPU). The Excel file includes detailed sensitivity tables.

## Risk notes & validation targets

* **Global headcount assumptions:** Global counts for lawyers and management consultants were extrapolated from U.S. counts using revenue‑share ratios (e.g., North America’s 42 % share of the $0.99 T global legal services market[[15]](https://www.precedenceresearch.com/legal-services-market#:~:text=Legal%20Services%20Market%20Growth%20Trends,and%20Emerging%20Opportunities)). These scaling factors are **[Unverified]** and may misrepresent regional differences in productivity. Future work should validate global workforce numbers through official international labour statistics or industry association reports.
* **Adoption rate:** The **30 %** adoption assumption is speculative. Surveys of early generative‑AI tool adoption among knowledge workers would help refine this figure.
* **ARPU ranges:** Pricing data from Perplexity, Elicit and Zotero reflect current (2024–2025) subscription levels[[13]](https://www.perplexity.ai/enterprise/pricing#:~:text=Get%20started%20for%20free)[[12]](https://support.elicit.com/en/articles/471617#:~:text=Elicit%20Plus%20is%20%2412%20per,120%20per%20year%20to%20subscribe). ARPU may vary for enterprise or discounted student plans. More precise benchmarks could be obtained by analysing revenue disclosures from similar SaaS products.
* **Knowledge‑worker estimate:** The TAM depends heavily on the ILO/UN definition of knowledge workers[[1]](https://sdgs.un.org/sites/default/files/2023-05/B59%20-%20Berg%20-%20Automation%20hits%20the%20knowledge%20worker%20ChatGPT%20and%20the%20future%20of%20work.pdf#:~:text=occupations,ILO%2C%202023). Alternative definitions (e.g., Gartner’s >1 B knowledge workers[[2]](https://www.usebraintrust.com/blog/knowledge-work-demand-index-july-2021#:~:text=Simply%20put%3A%20knowledge%20workers%20are,business%20in%20three%20major%20ways)) can shift TAM by ±25 %.

## Deliverables

* **Excel Workbook:** TAM\_SAM\_SOM.xlsx with tabs for **Assumptions**, **Sources**, **Roles**, **Calcs**, and **Sensitivity**. Each number is traceable to its source; any extrapolation is labelled **[Unverified]**.

[[1]](https://sdgs.un.org/sites/default/files/2023-05/B59%20-%20Berg%20-%20Automation%20hits%20the%20knowledge%20worker%20ChatGPT%20and%20the%20future%20of%20work.pdf#:~:text=occupations,ILO%2C%202023) B59%20-%20Berg%20-%20Automation%20hits%20the%20knowledge%20worker%20ChatGPT%20and%20the%20future%20of%20work.pdf

<https://sdgs.un.org/sites/default/files/2023-05/B59%20-%20Berg%20-%20Automation%20hits%20the%20knowledge%20worker%20ChatGPT%20and%20the%20future%20of%20work.pdf>

[[2]](https://www.usebraintrust.com/blog/knowledge-work-demand-index-july-2021#:~:text=Simply%20put%3A%20knowledge%20workers%20are,business%20in%20three%20major%20ways) Announcing The Knowledge Work Demand Index.

<https://www.usebraintrust.com/blog/knowledge-work-demand-index-july-2021>

[[3]](https://www.bls.gov/oes/2023/May/oes131111.htm#:~:text=National%20estimates%20for%20Management%20Analysts%3A) Management Analysts

<https://www.bls.gov/oes/2023/May/oes131111.htm>

[[4]](https://www.bls.gov/oes/2023/may/oes131161.htm#:~:text=National%20estimates%20for%20Market%20Research,Analysts%20and%20Marketing%20Specialists) Market Research Analysts and Marketing Specialists

<https://www.bls.gov/oes/2023/may/oes131161.htm>

[[5]](https://www.bls.gov/oes/2023/may/oes152031.htm#:~:text=Geographic%20profile%20for%20Operations%20Research,Analysts) Operations Research Analysts

<https://www.bls.gov/oes/2023/may/oes152031.htm>

[[6]](https://www.bls.gov/oes/2023/may/oes132051.htm#:~:text=National%20estimates%20for%20Financial%20and,Investment%20Analysts) Financial and Investment Analysts

<https://www.bls.gov/oes/2023/may/oes132051.htm>

[[7]](https://www.bls.gov/oes/2023/may/oes273042.htm#:~:text=Geographic%20profile%20for%20Technical%20Writers) Technical Writers

<https://www.bls.gov/oes/2023/may/oes273042.htm>

[[8]](https://www.americanbar.org/news/profile-legal-profession/demographics/#:~:text=There%20are%20more%20than%201,state%20and%20territory) Demographics

<https://www.americanbar.org/news/profile-legal-profession/demographics/>

[[9]](https://www.ceicdata.com/en/united-states/number-of-researchers-and-personnel-on-research-and-development-oecd-member-annual/number-of-researchers-total#:~:text=United%20States%20Number%20of%20Researchers%3A,United%20States) United States Number of Researchers: Total | Economic Indicators | CEIC

<https://www.ceicdata.com/en/united-states/number-of-researchers-and-personnel-on-research-and-development-oecd-member-annual/number-of-researchers-total>

[[10]](https://uis.unesco.org/en/news/Explore-latest-progress-on-SDG9.5-Research-Development-through-key-indicators-February2025#:~:text=Between%202015%20and%202022%2C%20the,at%20around91%20researchers%20per%20million) February 2025 UIS Data Release: Explore the latest progress on SDG 9.5 Research and Development through key indicators | UNESCO UIS

<https://uis.unesco.org/en/news/Explore-latest-progress-on-SDG9.5-Research-Development-through-key-indicators-February2025>

[[11]](https://www.zotero.org/storage#:~:text=Individual%20Pricing) Zotero | Storage

<https://www.zotero.org/storage>

[[12]](https://support.elicit.com/en/articles/471617#:~:text=Elicit%20Plus%20is%20%2412%20per,120%20per%20year%20to%20subscribe) Overview of Elicit Plans

<https://support.elicit.com/en/articles/471617>

[[13]](https://www.perplexity.ai/enterprise/pricing#:~:text=Get%20started%20for%20free) Perplexity Enterprise Pro Pricing | Get Started Today

<https://www.perplexity.ai/enterprise/pricing>

[[14]](https://techcrunch.com/2025/07/02/perplexity-launches-a-200-monthly-subscription-plan/#:~:text=Perplexity%20now%20offers%20a%20variety,Max%20plan%20for%20Enterprise%20customers) Perplexity launches a $200 monthly subscription plan | TechCrunch

<https://techcrunch.com/2025/07/02/perplexity-launches-a-200-monthly-subscription-plan/>

[[15]](https://www.precedenceresearch.com/legal-services-market#:~:text=Legal%20Services%20Market%20Growth%20Trends,and%20Emerging%20Opportunities) Legal Services Market Size to Attain USD 1.55 Trillion by 2034

<https://www.precedenceresearch.com/legal-services-market>