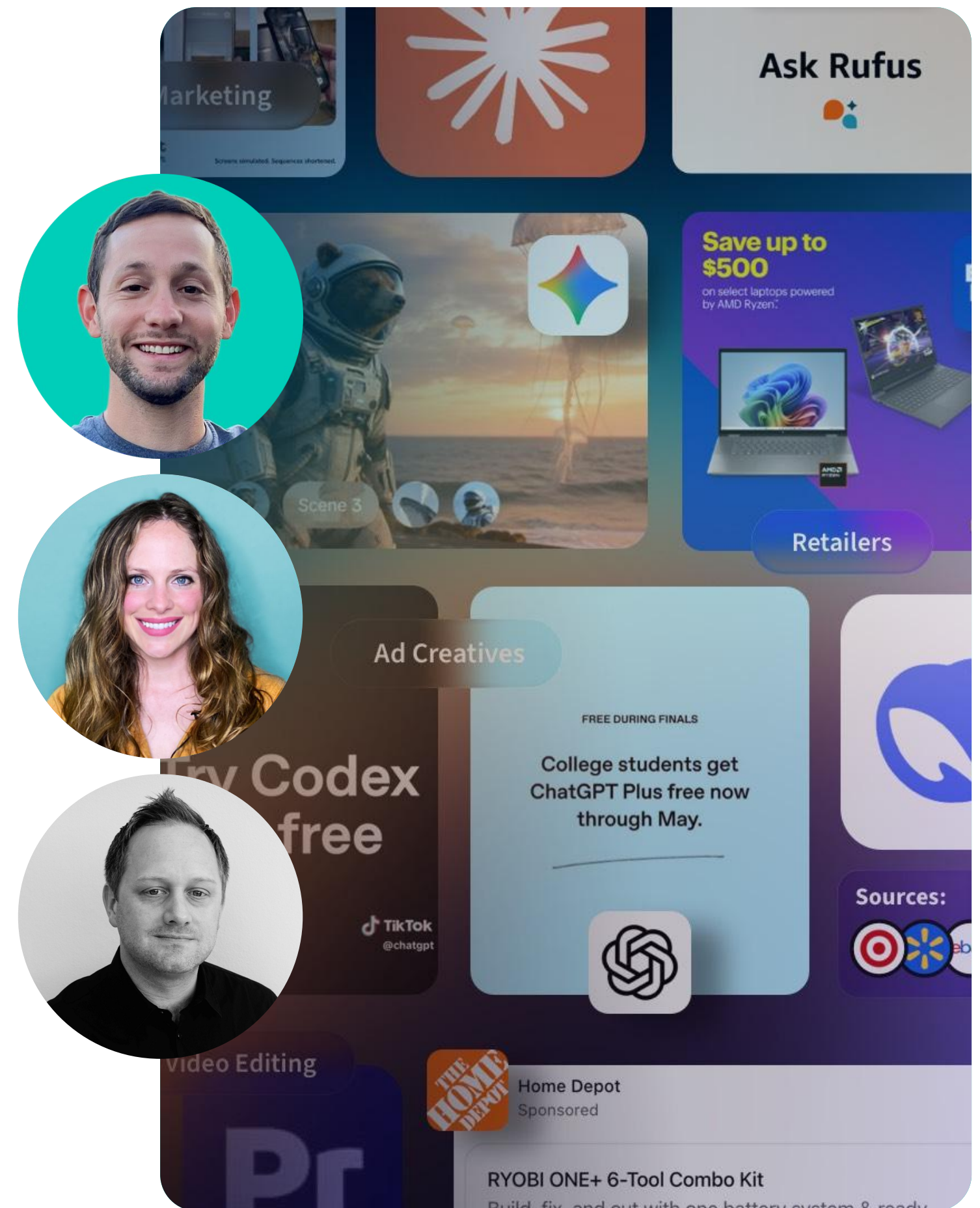


AI Economy by the Numbers: Market Share, Monetization and What Comes Next

Sept 17 | 12:30 PM ET / 3:30 PM PT



Speakers



Lexi Sydow

Chief Analyst & Founder, The ATTN Economy
Insights Advisor, Sensor Tower



lexi@attneconomy.com



Jonathan Briskman

Director, Market Insights
Sensor Tower



jonathan.briskman@sensortower.com



Roger Dunn

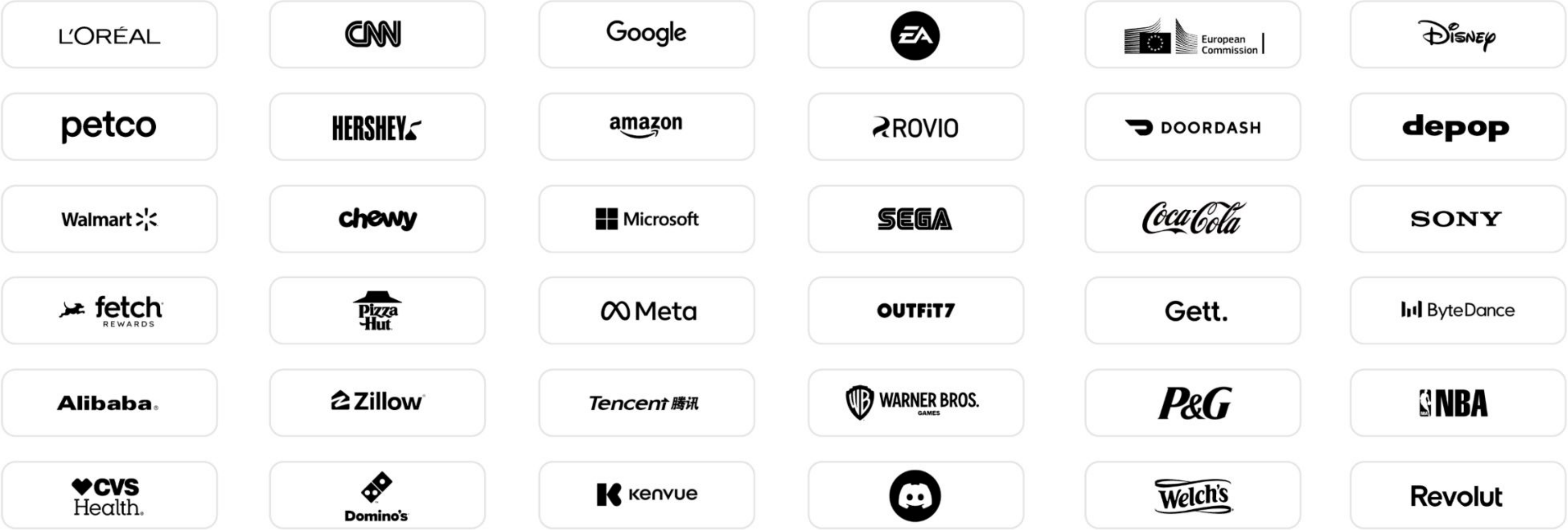
Chief Commercial Officer, Thrad
Author 'AI Commerce Brief' Newsletter



roger@thrad.ai

Sensor Tower | Our Customers

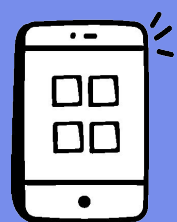
Top publishers trust Sensor Tower insights to grow their business



Note: Top publishers by app store revenue | Source: Sensor Tower

The leader in digital market insights since 2013

Providing comprehensive digital insights to market leaders across the globe



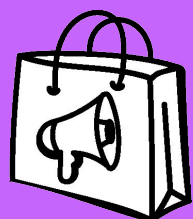
Mobile App



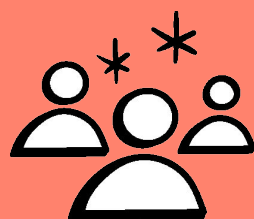
Gaming



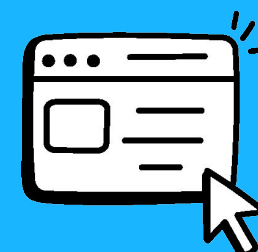
Digital Advertising



Retail Media



Audience



Website

**Data-driven,
people-powered.**

Our data comes from a panel of more than 5 million consumers, enriched by our data scientists and proprietary algorithms.

Agenda

How is the **AI Competitive Landscape** Changing?

GenAI Audiences & Changing Habits

Shopping & The Path to Conversion: Has Gen AI Gone Full Funnel?

Moving Beyond Discovery: **AI Marketing** Goes Mainstream

A First Look at **ChatGPT Ads**

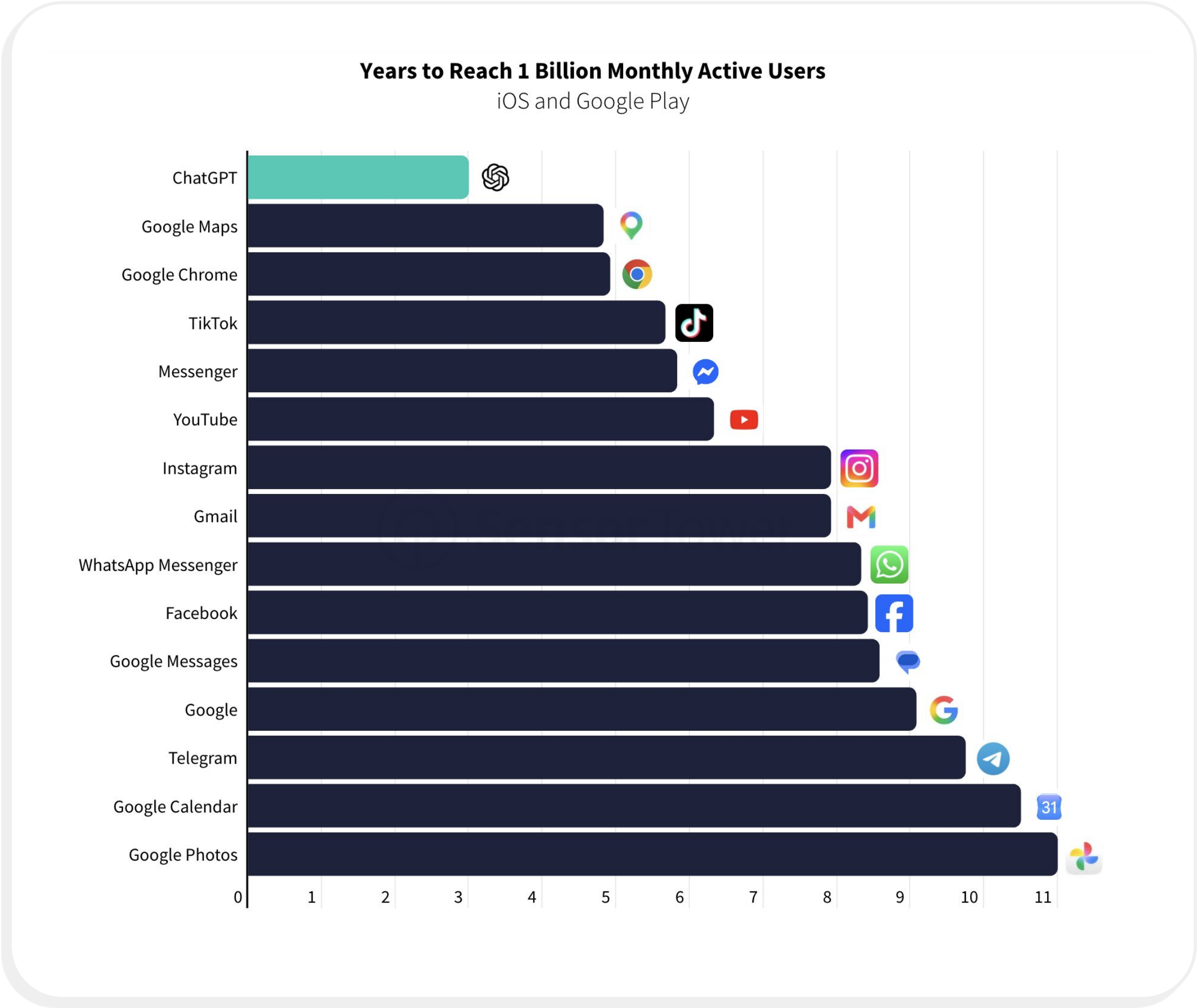
Q&A

How is the **AI Competitive Landscape** Changing?



ChatGPT Is the Fastest App to Reach 1 Billion Monthly Active Users

Faster than TikTok and Instagram

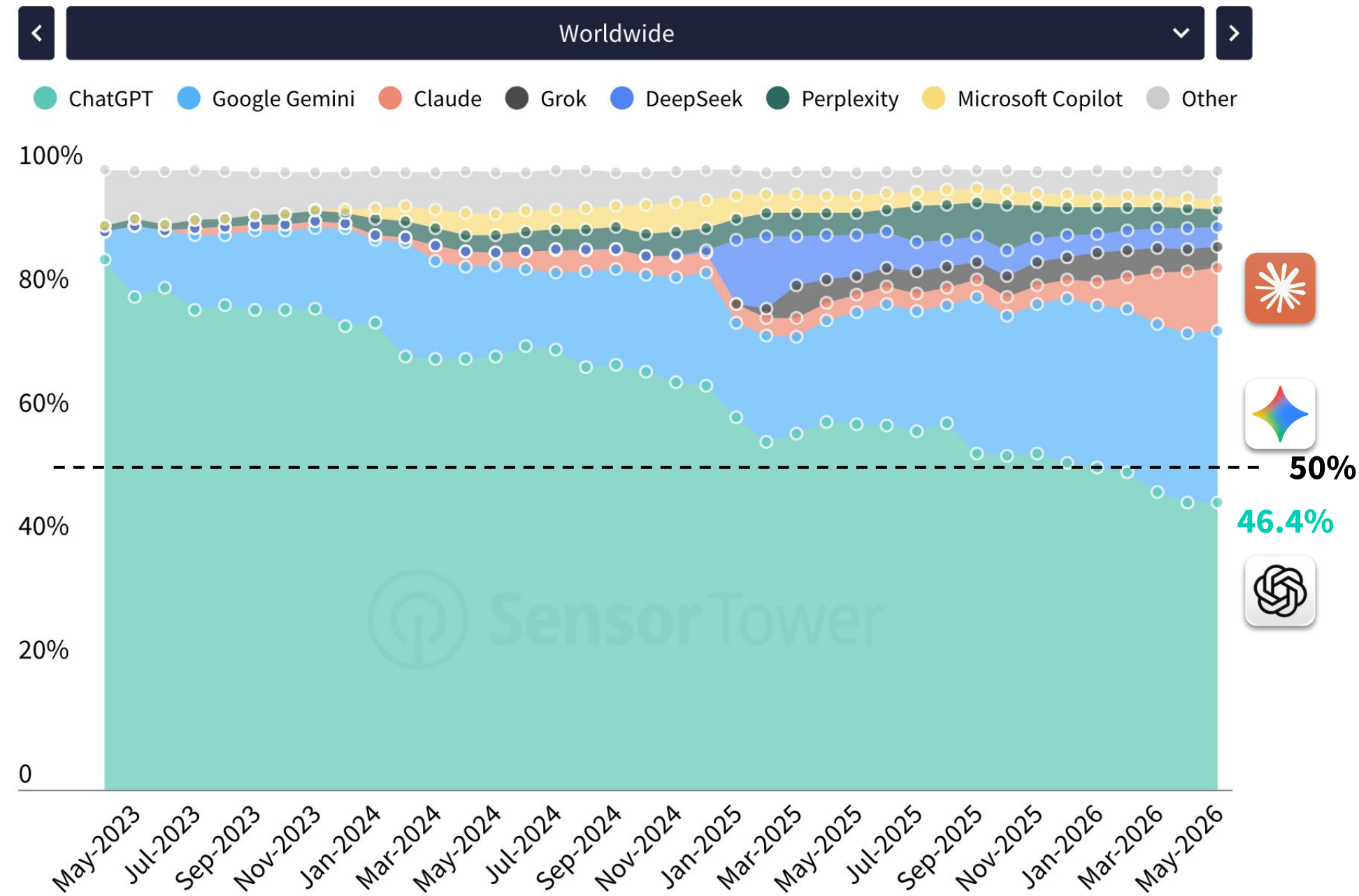


Market Share: ChatGPT Cedes Ground

ChatGPT's True Audience
Market Share Falls
Below 50%

Deduplicated Standalone App & Web Market Share for Top AI Assistants

Note: Does not include embedded in-app AI users (see page 8)

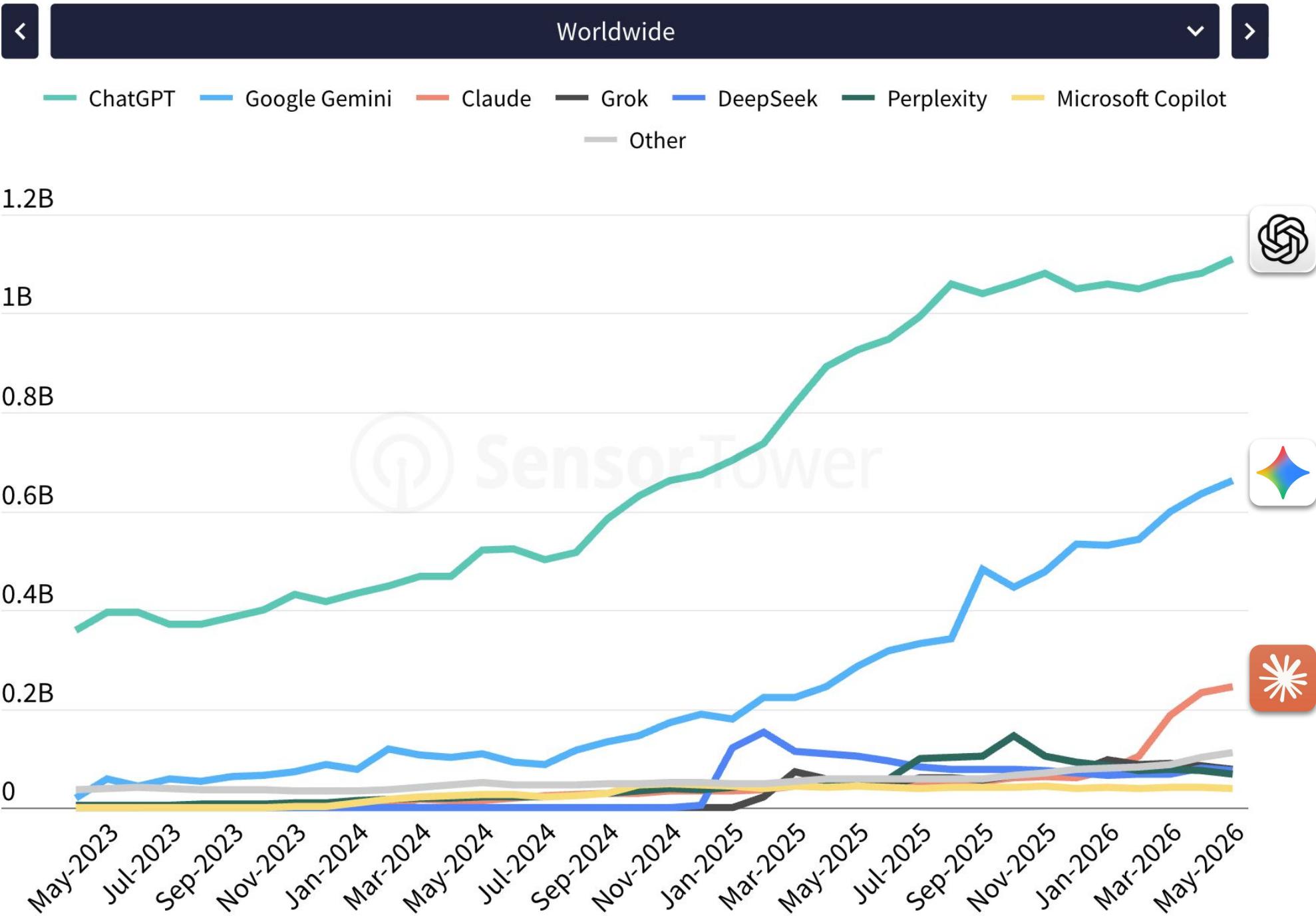


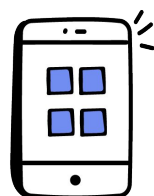
ChatGPT's User Base Continues to Climb

Despite an Increasingly Competitive Landscape

Deduplicated Standalone App & Web Users for Top AI Assistants

Note: Does not include embedded in-app AI users (see page 8)

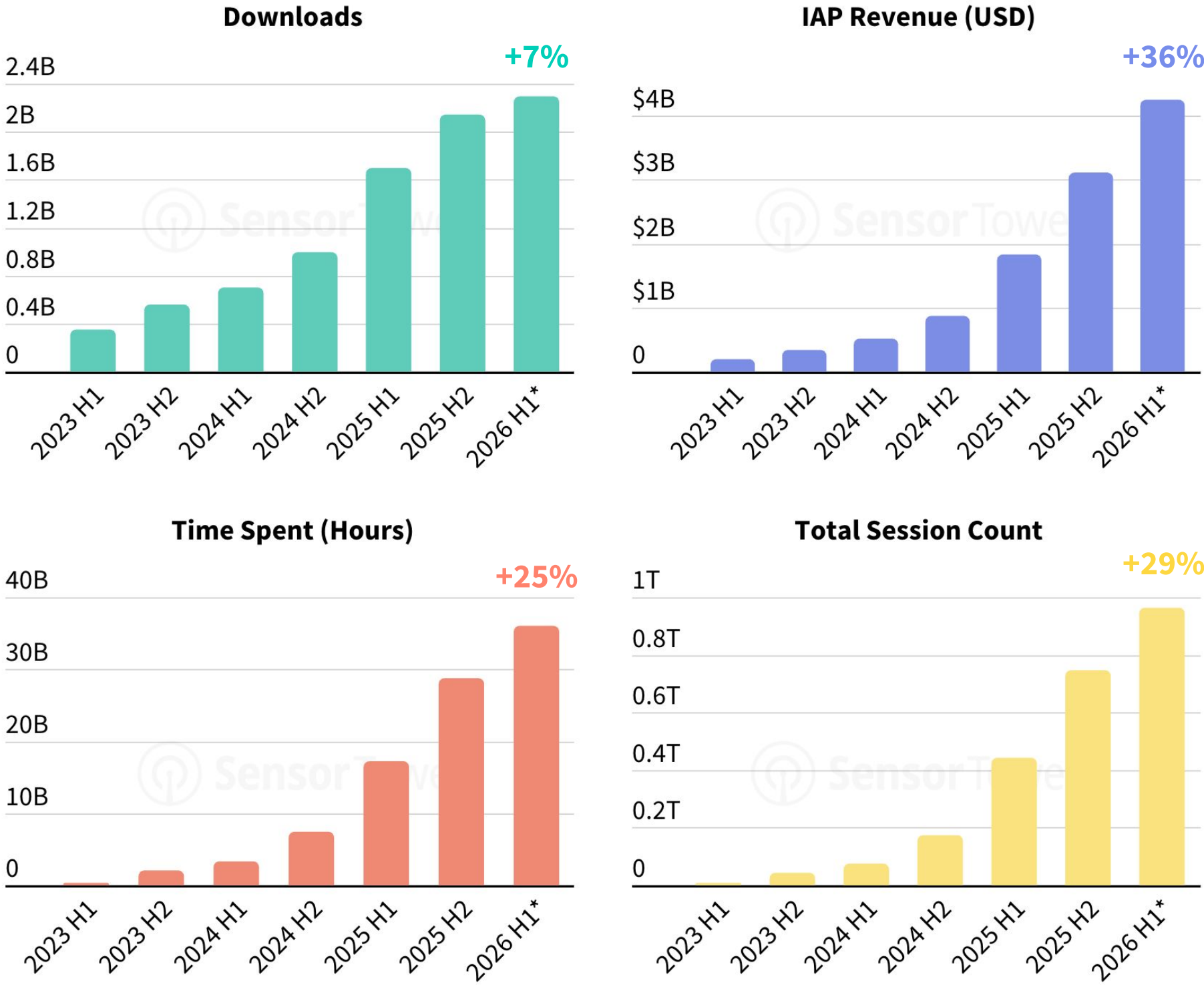


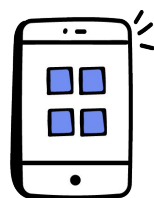


Mobile App Market

Global Trends Show Growth Rates Slowing but Still Double-Digits

Global Gen AI App Trends

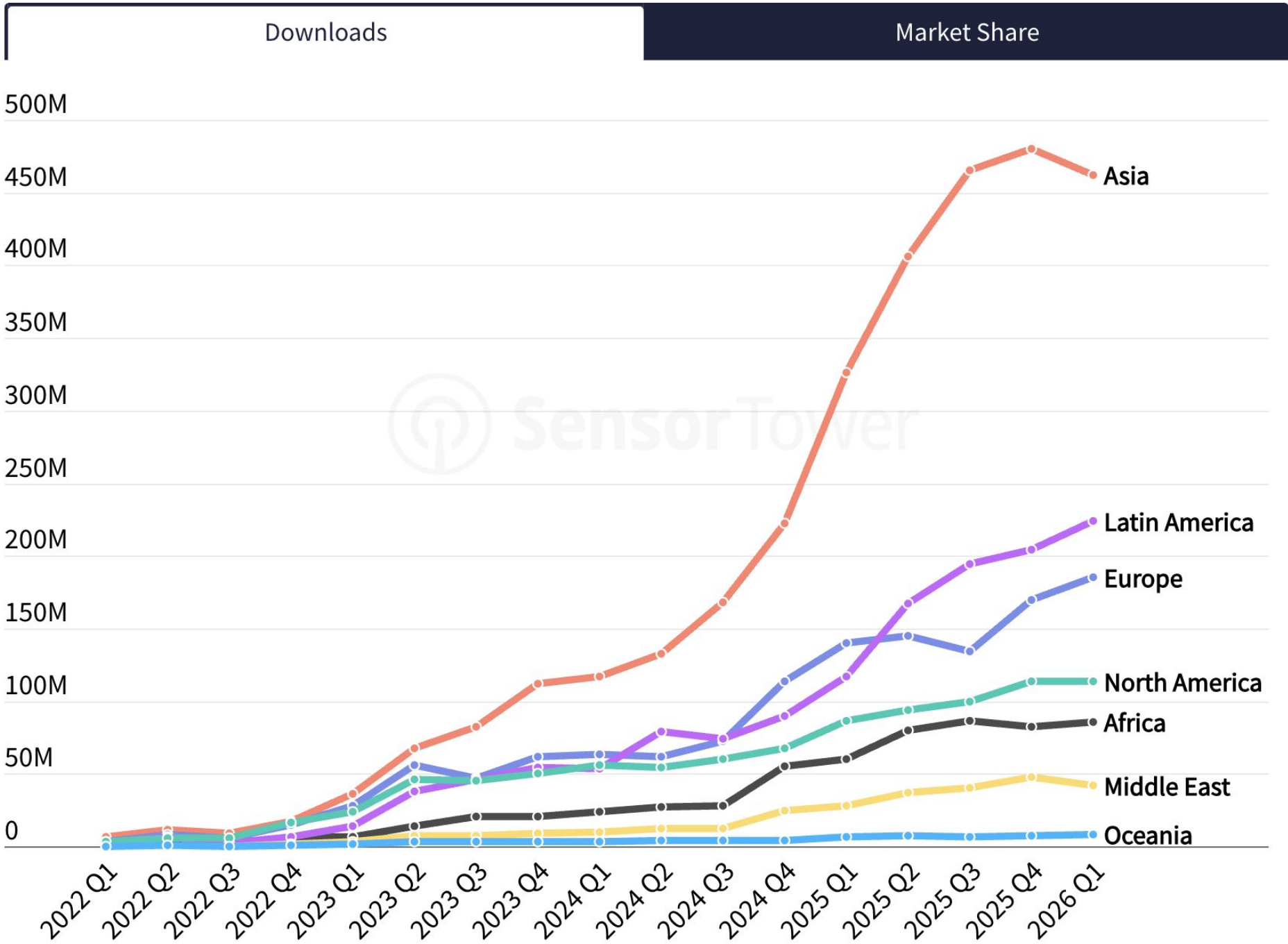


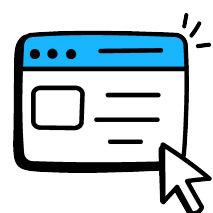


Mobile App Market

AI App Market Softens
for First Time in Asia

Generative AI App Download Trends by Region
iOS and Google Play



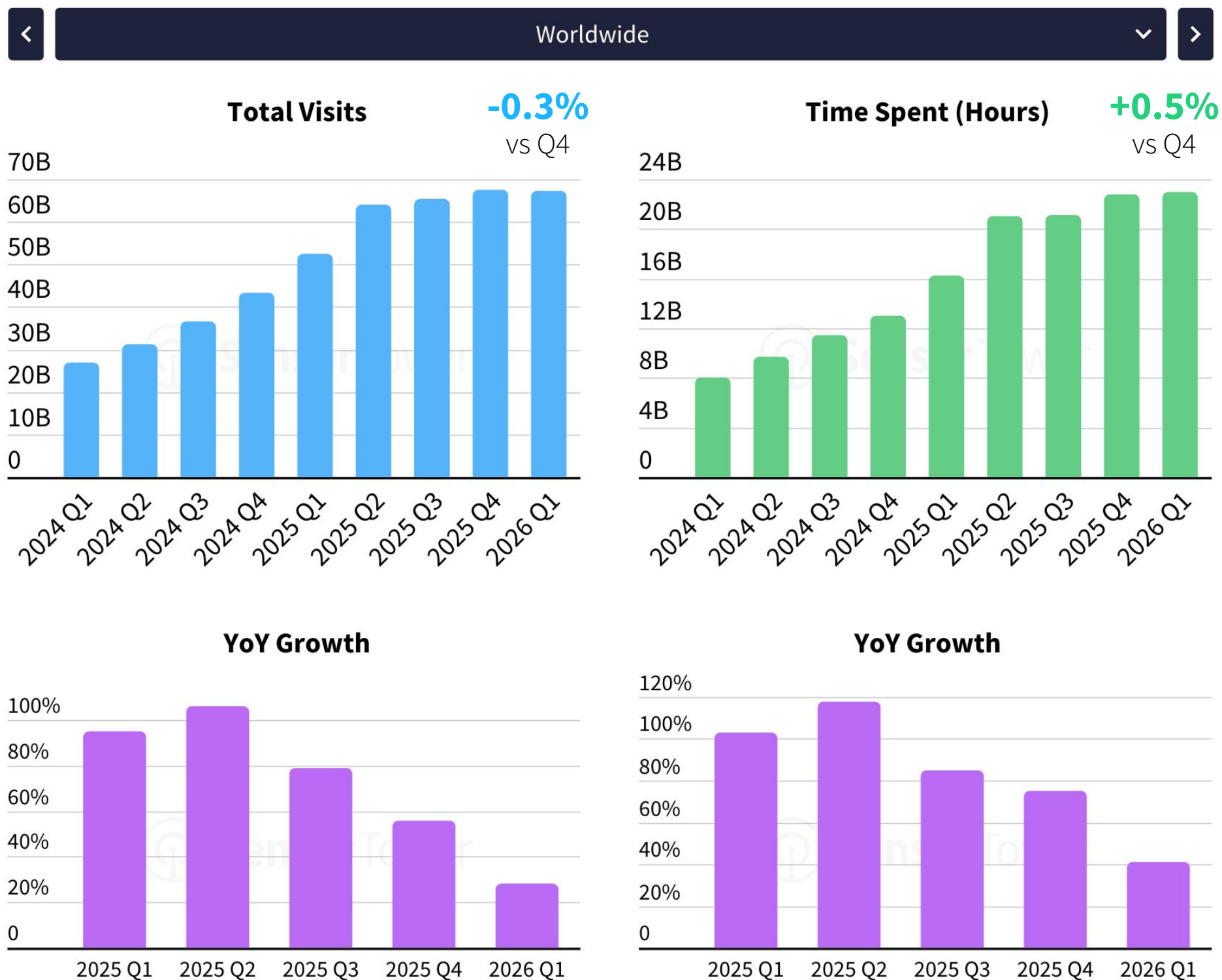


Website Usage

Stagnation in Total Visits and Time Spent on Websites

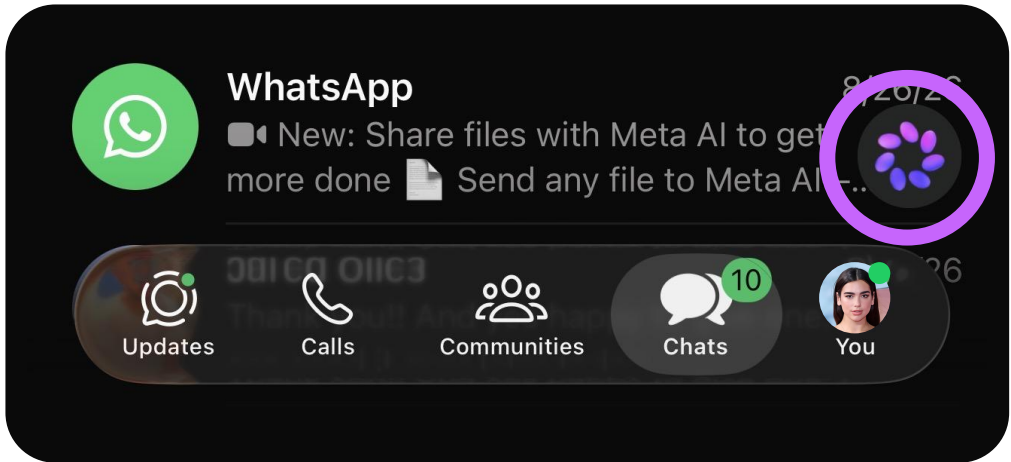
Yearly Time Spent and Visits Trends for Generative AI Websites

Mobile and Desktop



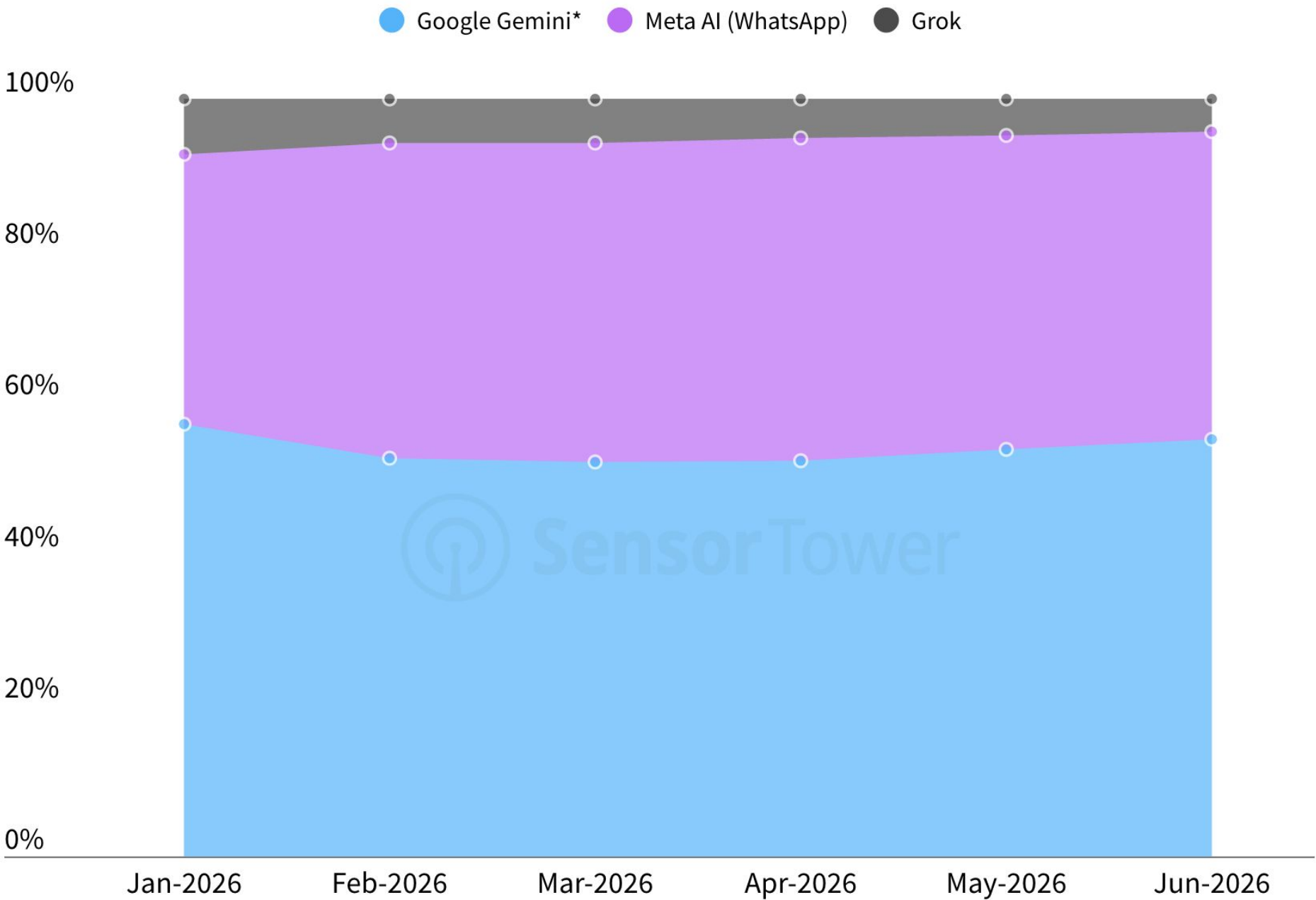
In-App AI Features

Market Share of Usage:
Grok vs. WhatsApp vs.
Google Gemini*



In-App AI Active Users Market Share for Top AI Assistants

Worldwide



*Includes native floating overlay within the Android ecosystem. Use of Google Gemini in other Google apps like Gmail, Google Docs, and Google Drive is not included.



Gen AI: **Audiences & Changing Habits**

Chase: Current Audience vs Ad-Exposed Audience

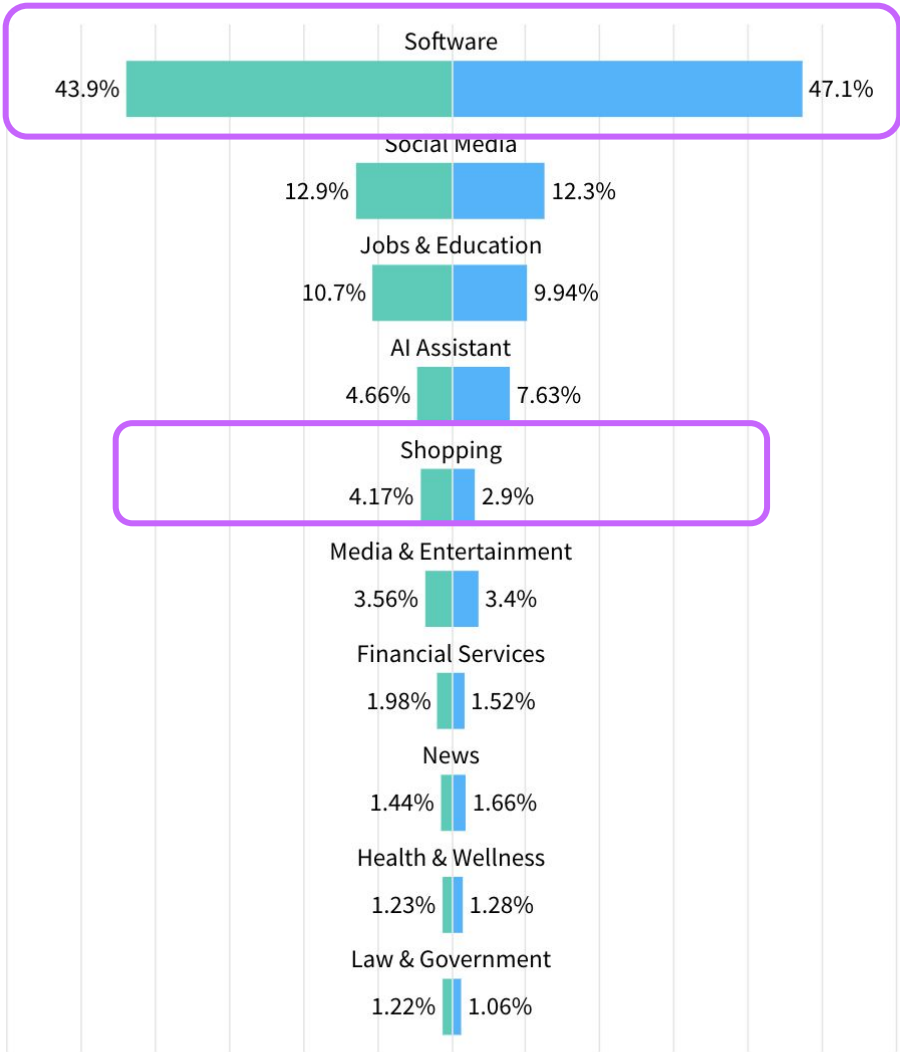
Traffic Flow | Top Genres

Q1 2026, US



chatgpt.com

inbound outbound



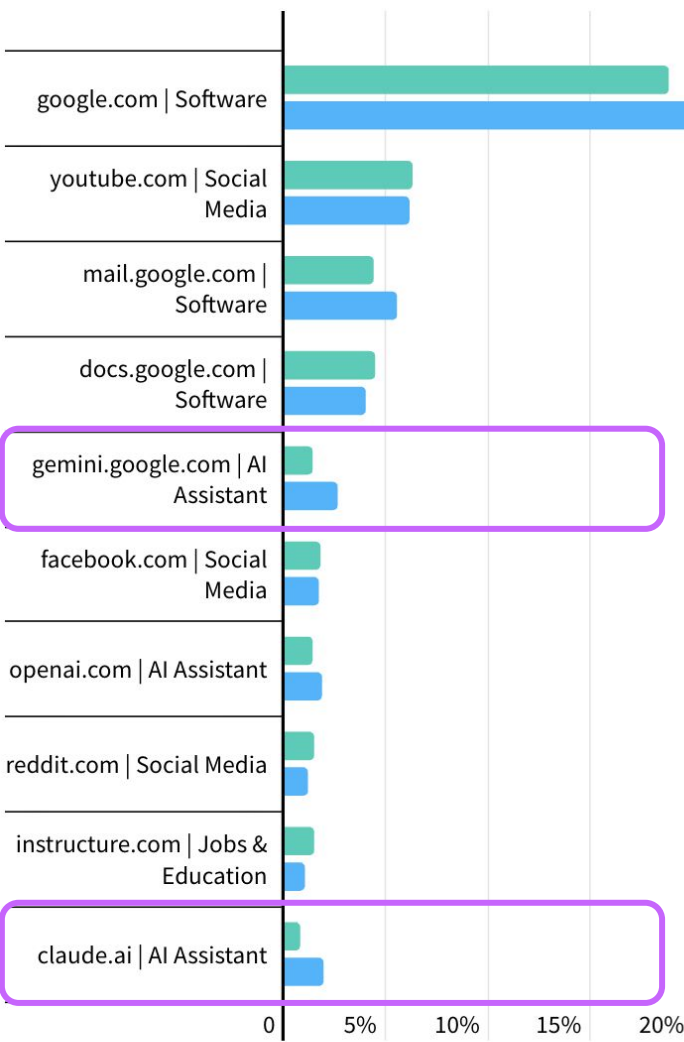
Traffic Flow | Top Websites

Q1 2026, US

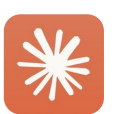
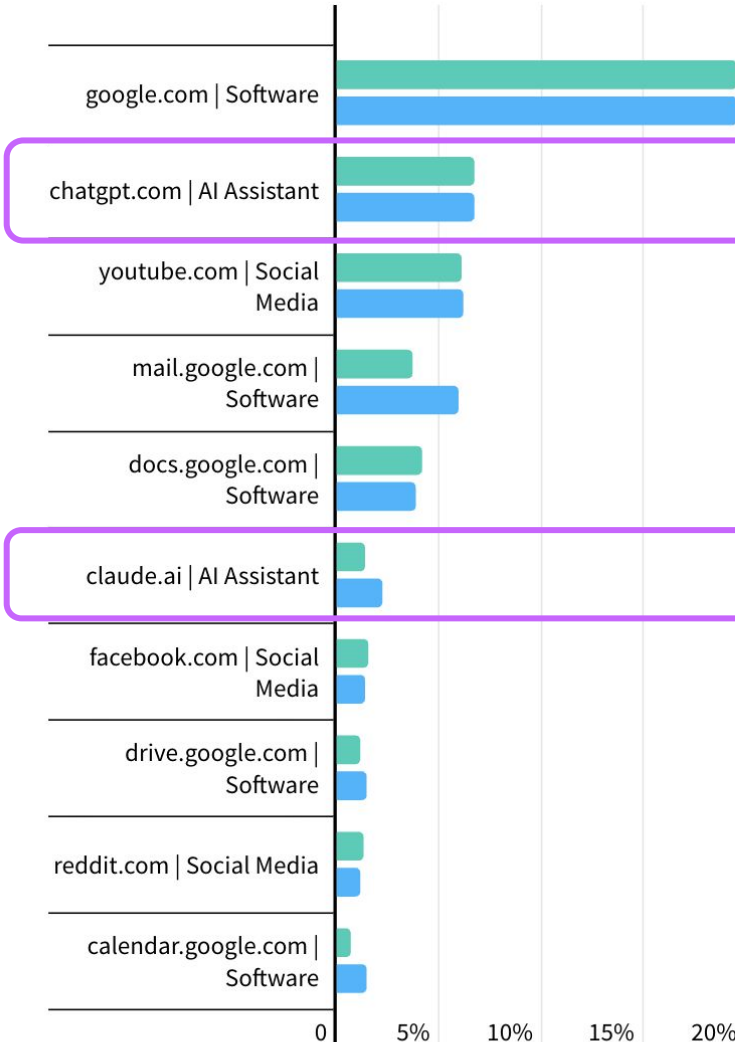
inbound outbound



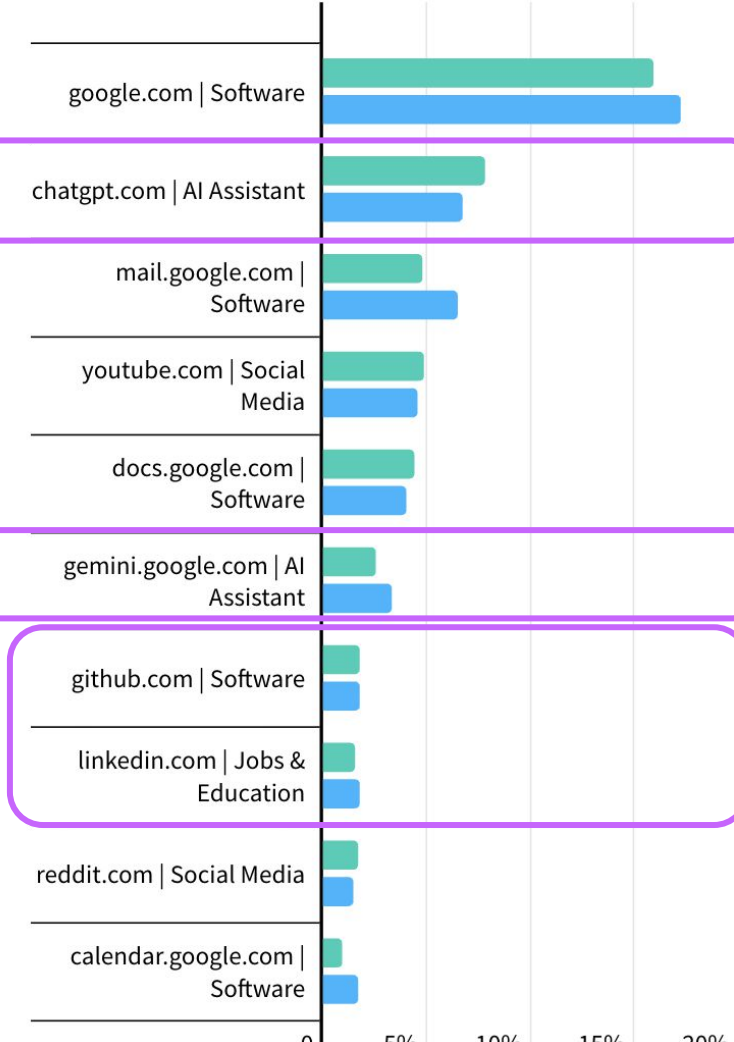
chatgpt.com



gemini.google.com



claude.ai



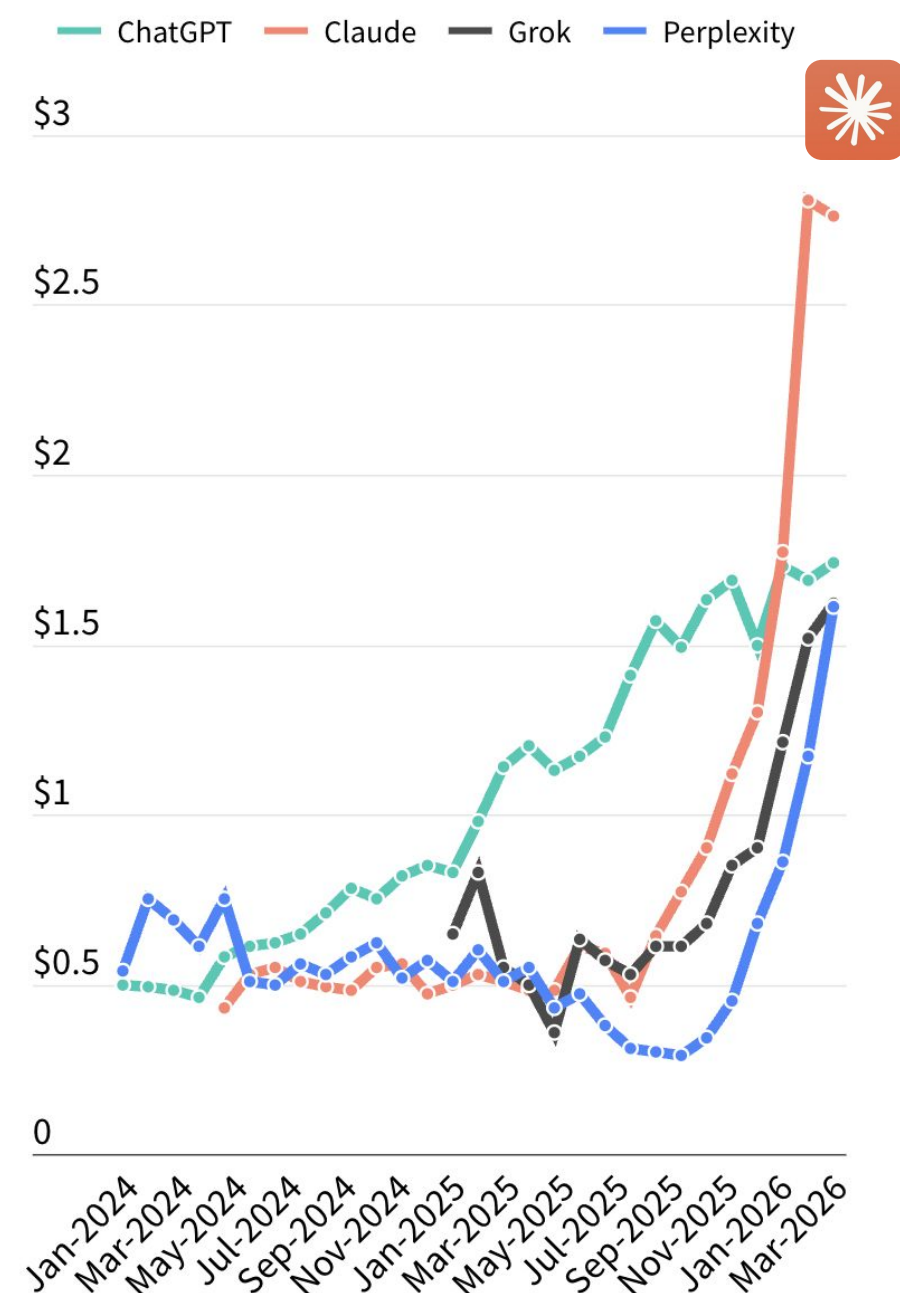
For Professionals

Claude Dominates for ARPU and Premium Users

IAP Monetization Trends for Select AI Assistant Apps

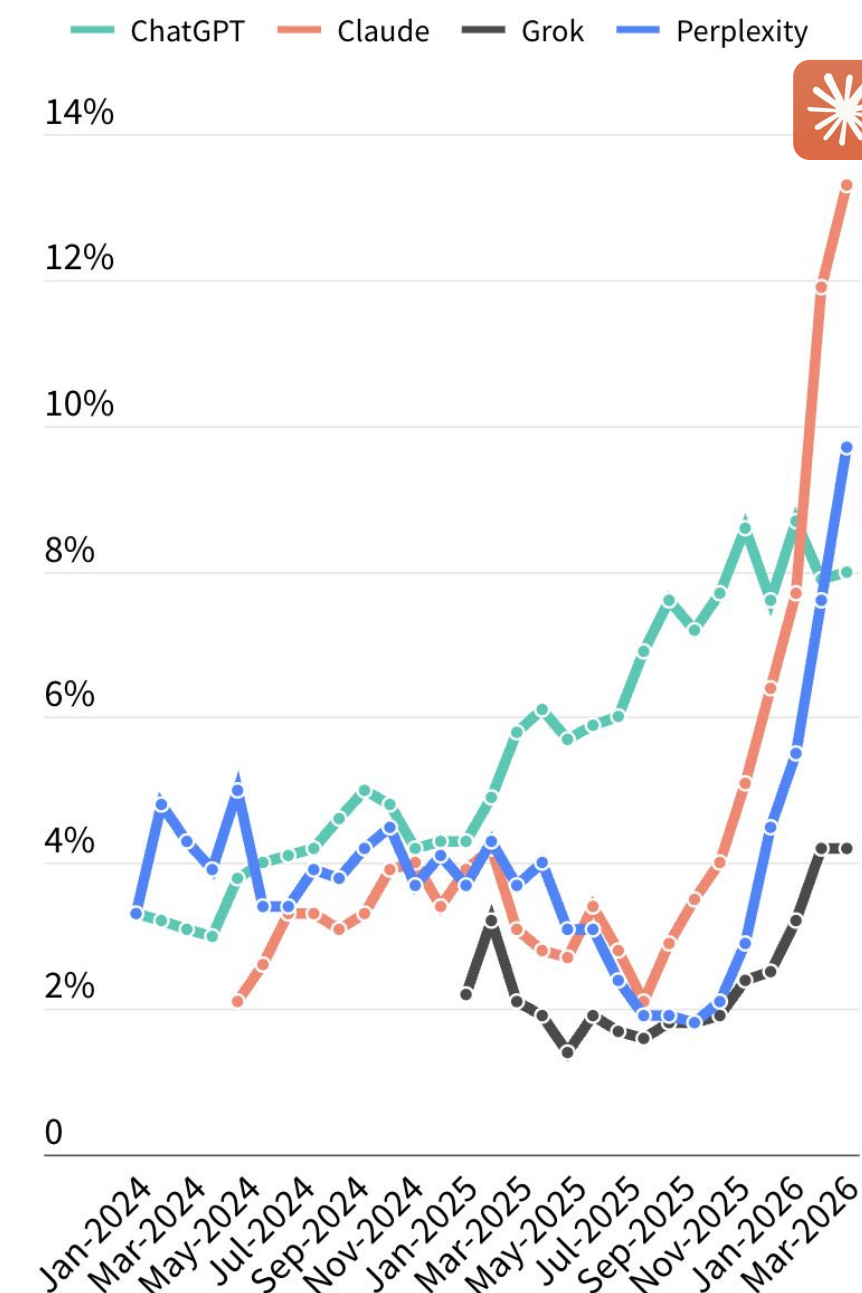
Average Monthly Revenue per User (ARPU)

iOS and Google Play, United States



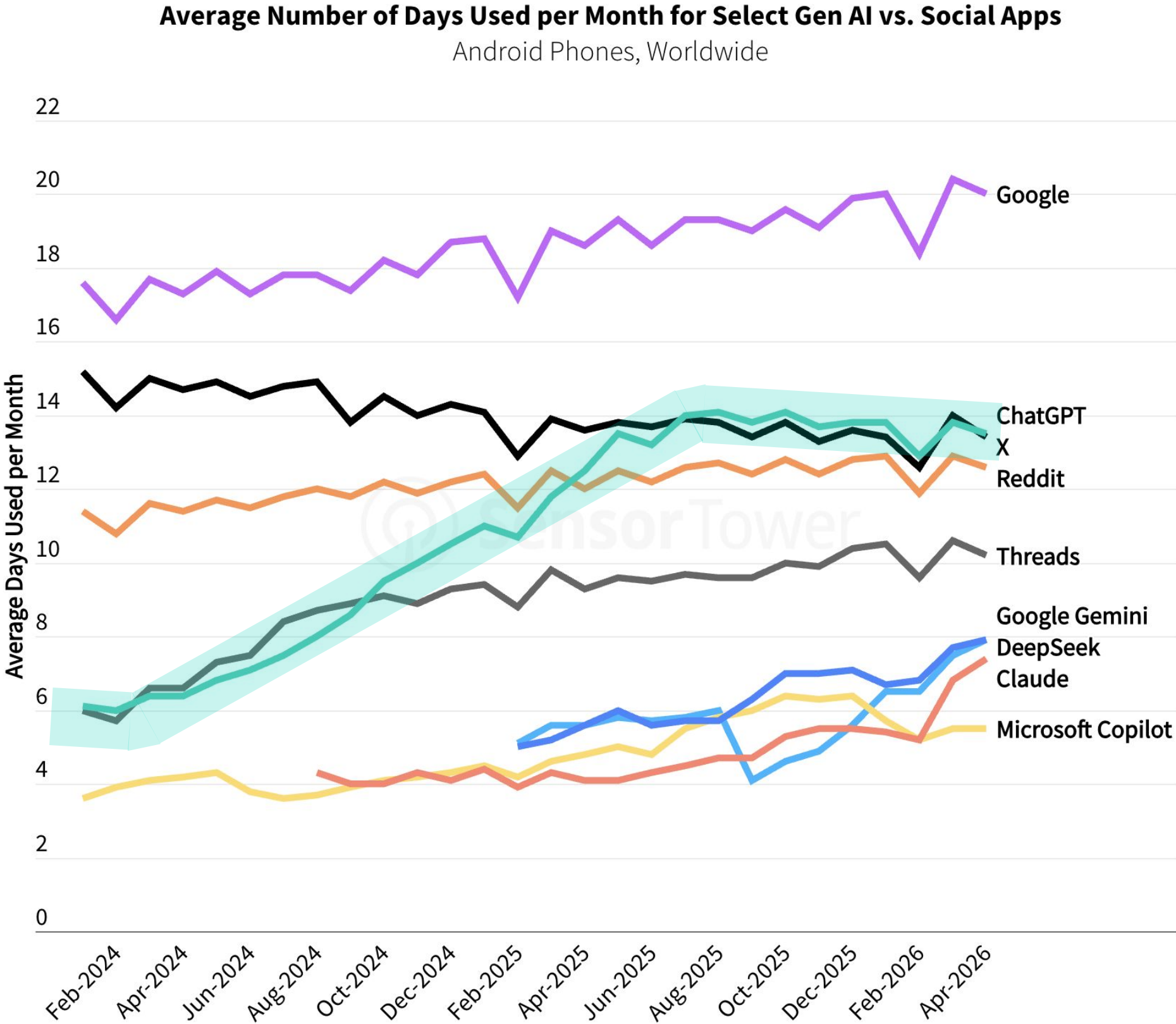
Share of Users that are Premium

iOS Only, United States



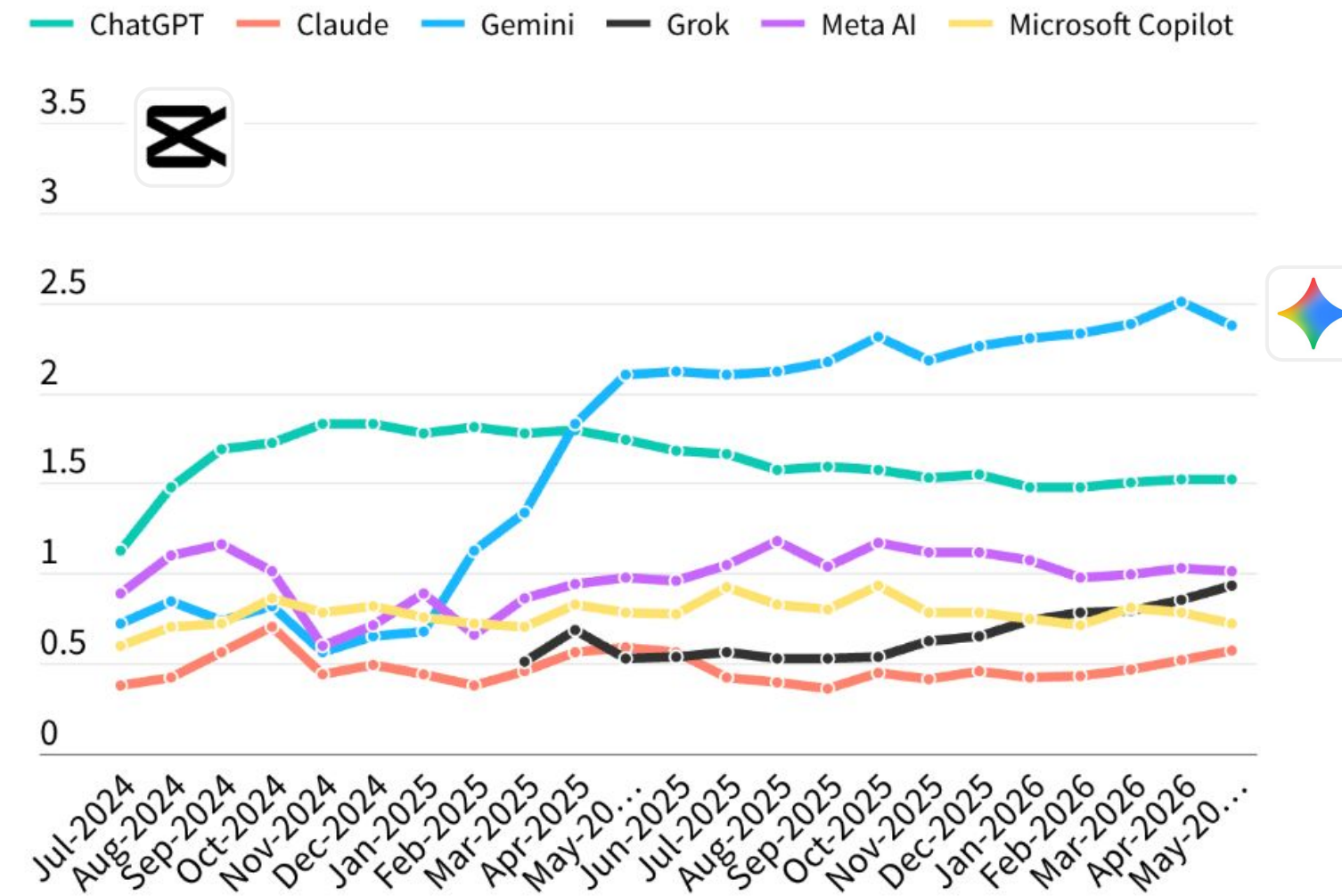
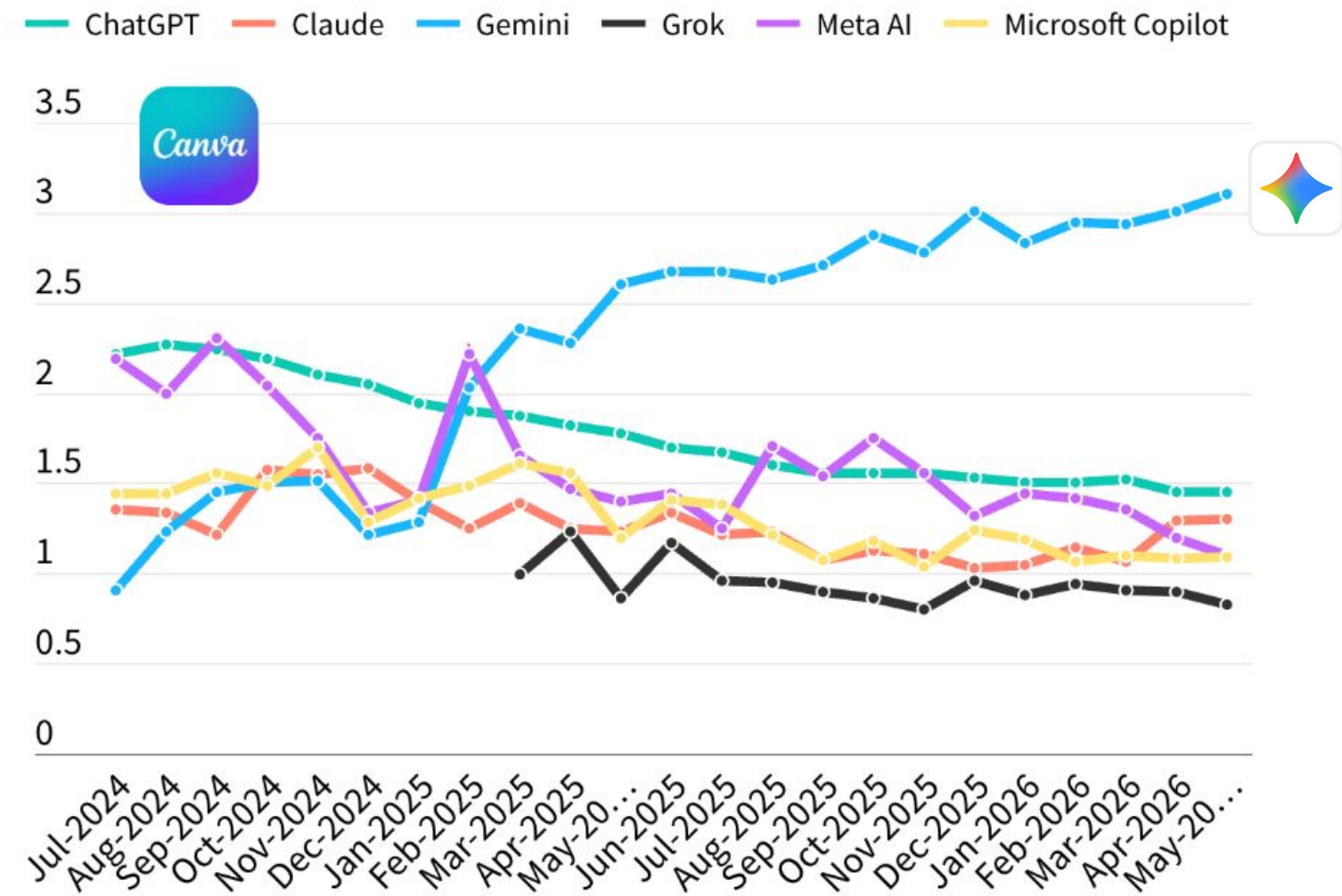
Habitual Use

AI Tools Begin to Embed as Habits



Google Gemini Gains Traction Among Creator Audiences

Affinity of AI Assistant Usage Among Canva and CapCut Users
in the United States



Source: Sensor Tower
Note: Affinity Score measures how likely Android users of Canva and CapCut are to engage with a selected AI assistant app relative to the Android general population.

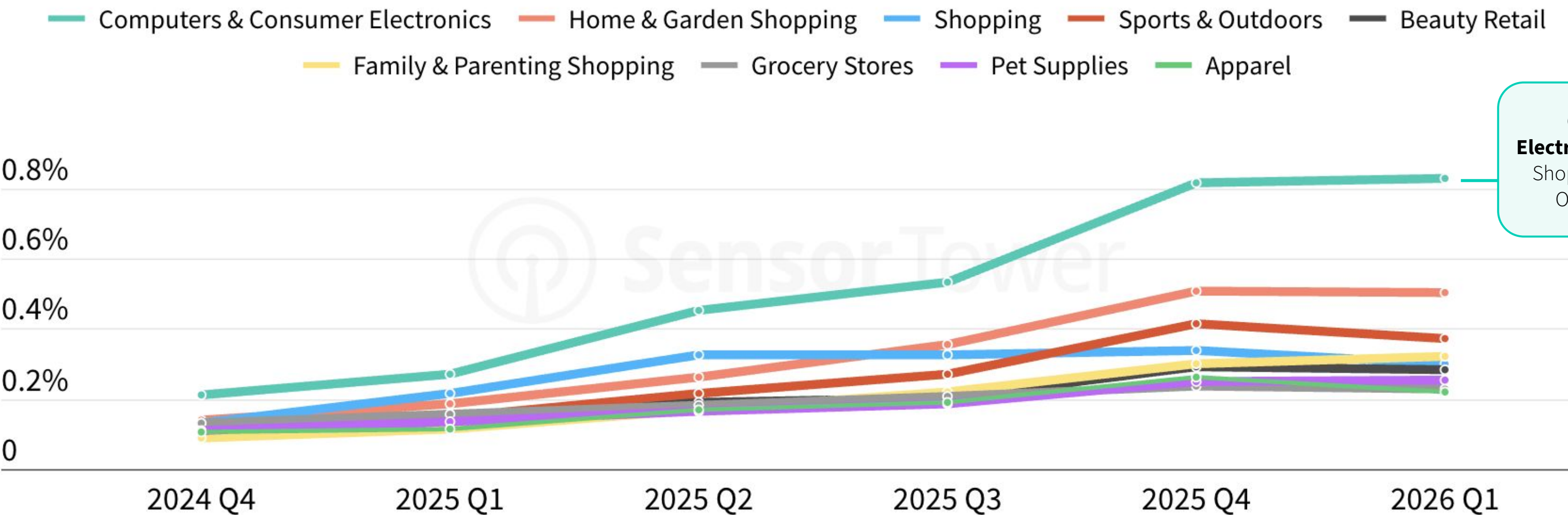


Shopping & The Path to Conversion: **Has Gen AI Gone Full Funnel?**

Gen AI Still Contributes <1% of Website Traffic to Shopping Sites, but Some Categories Over-Perform

% of Total Visits from GenAI

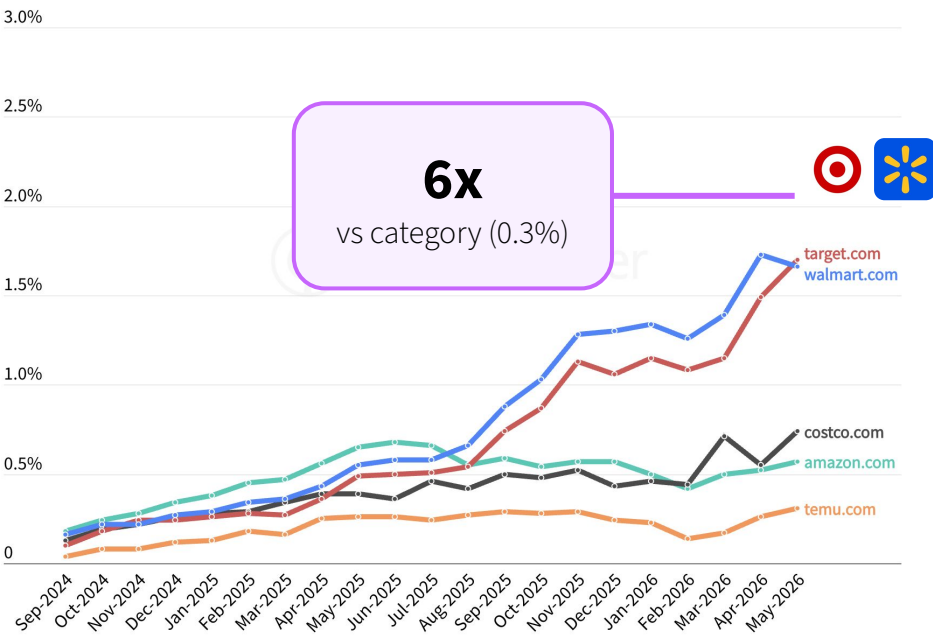
Top 50 Shopping Websites in Each Retail Subcategory, United States



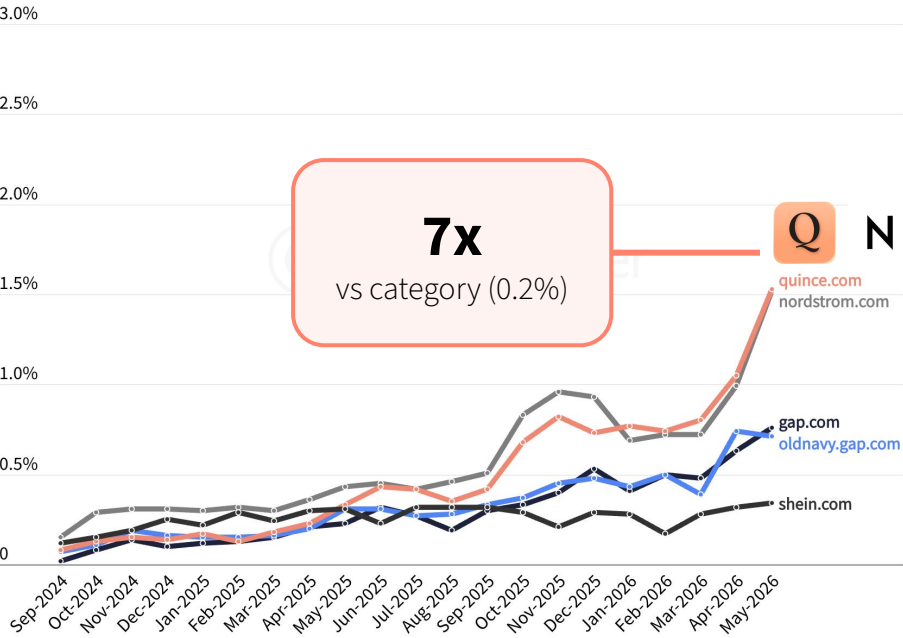
Some Brands Are Out-Performing for Their Category

A Larger Portion of Their Total Traffic is Coming from Gen AI Sources (Still <3%)

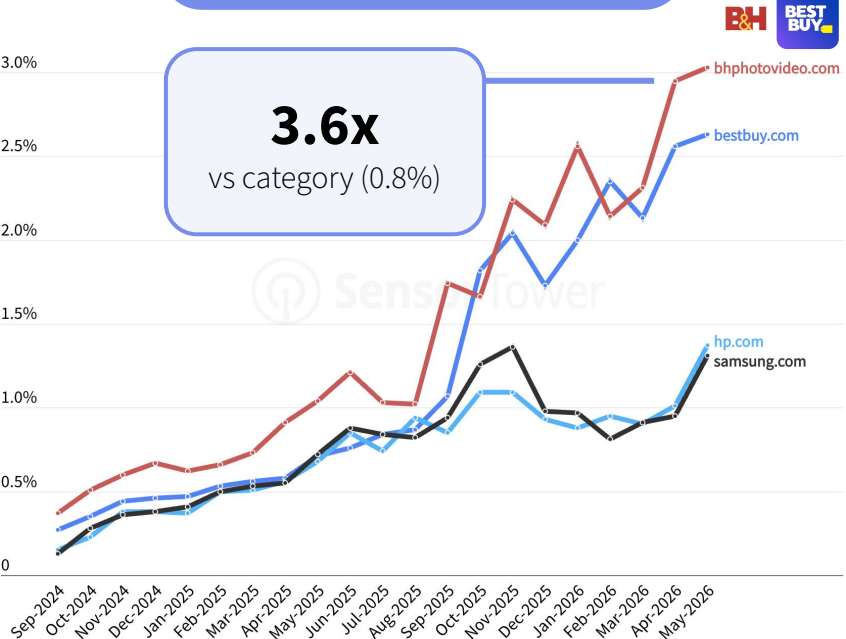
General Shopping



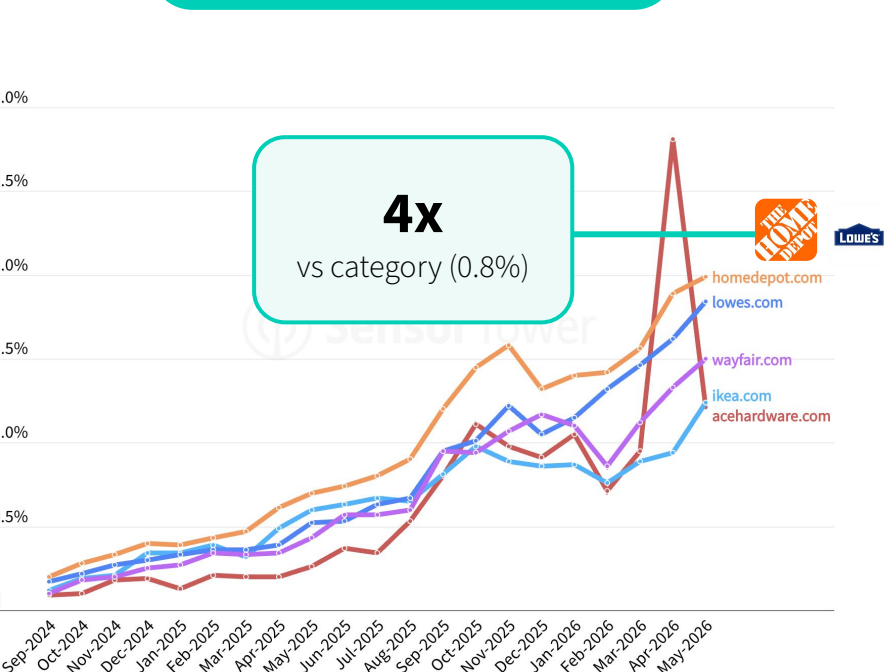
Apparel



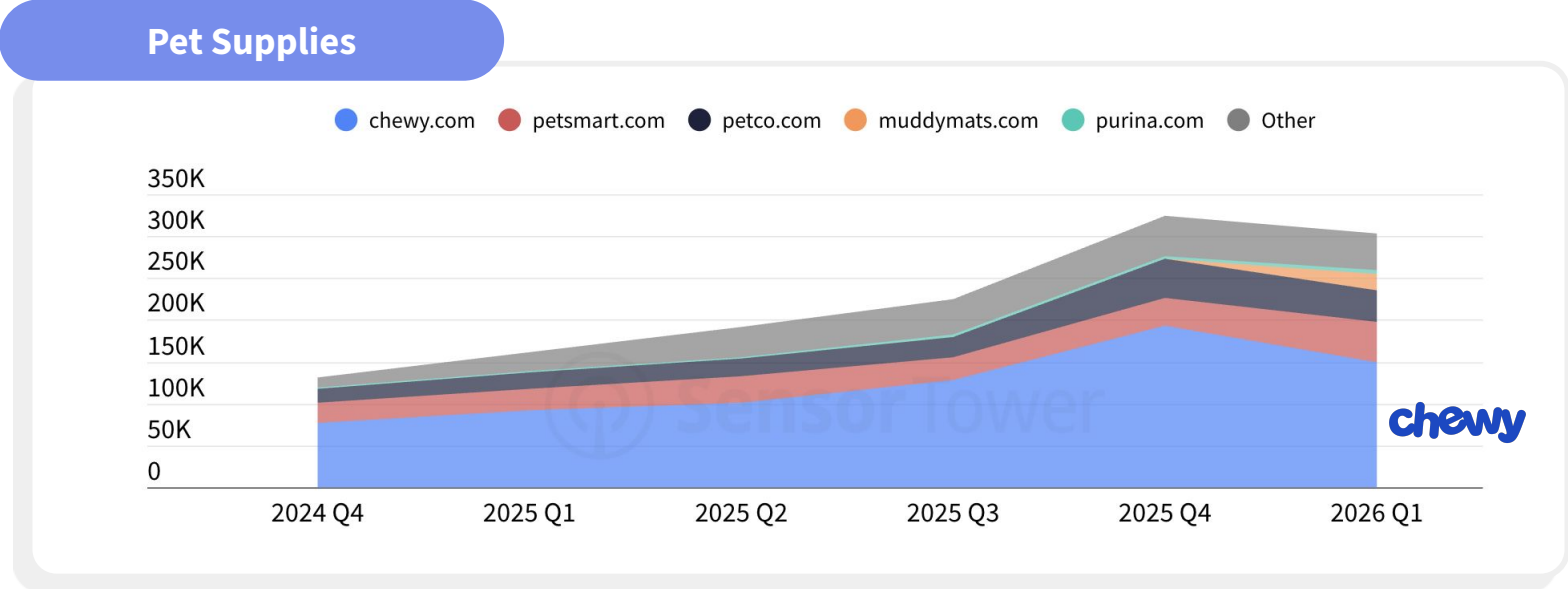
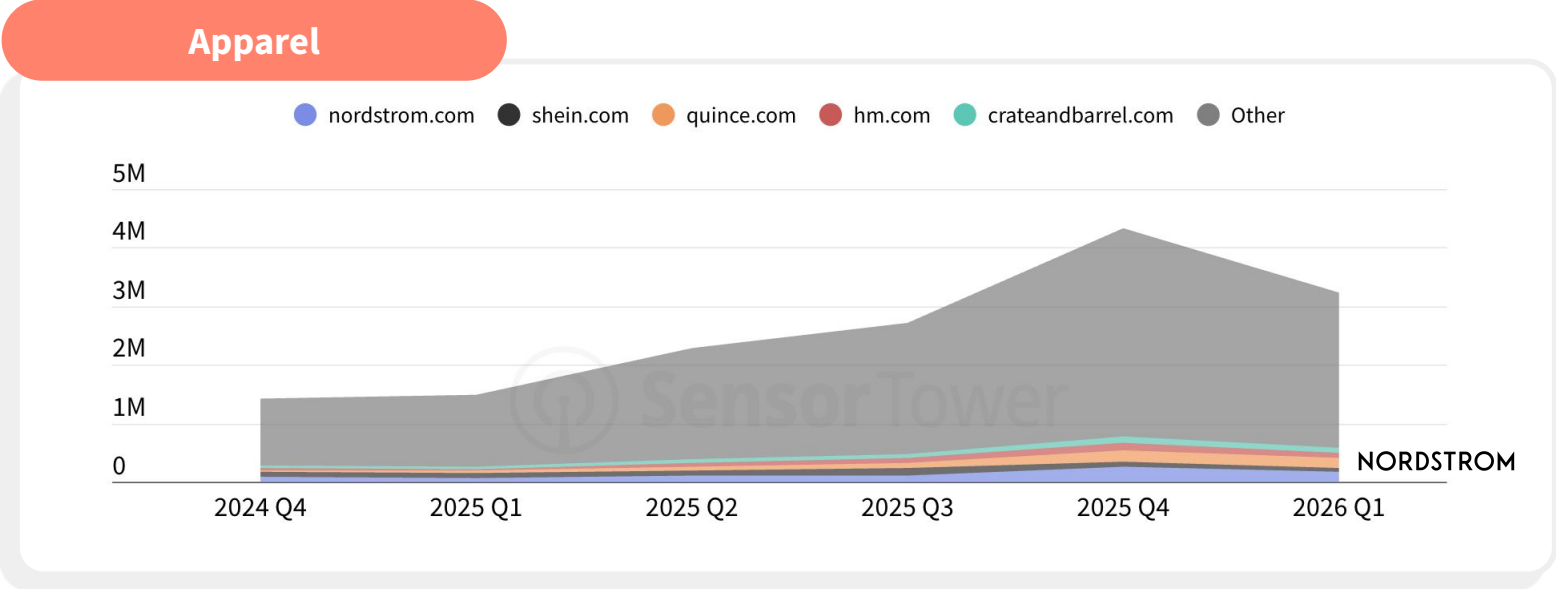
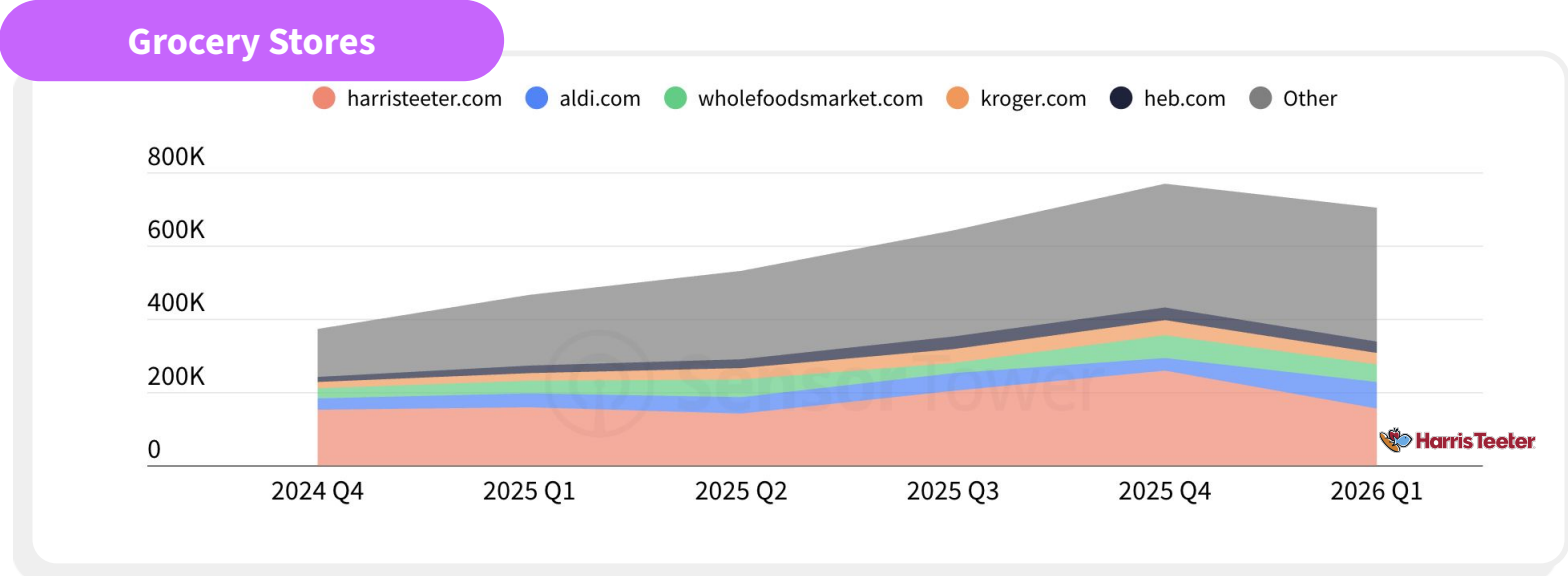
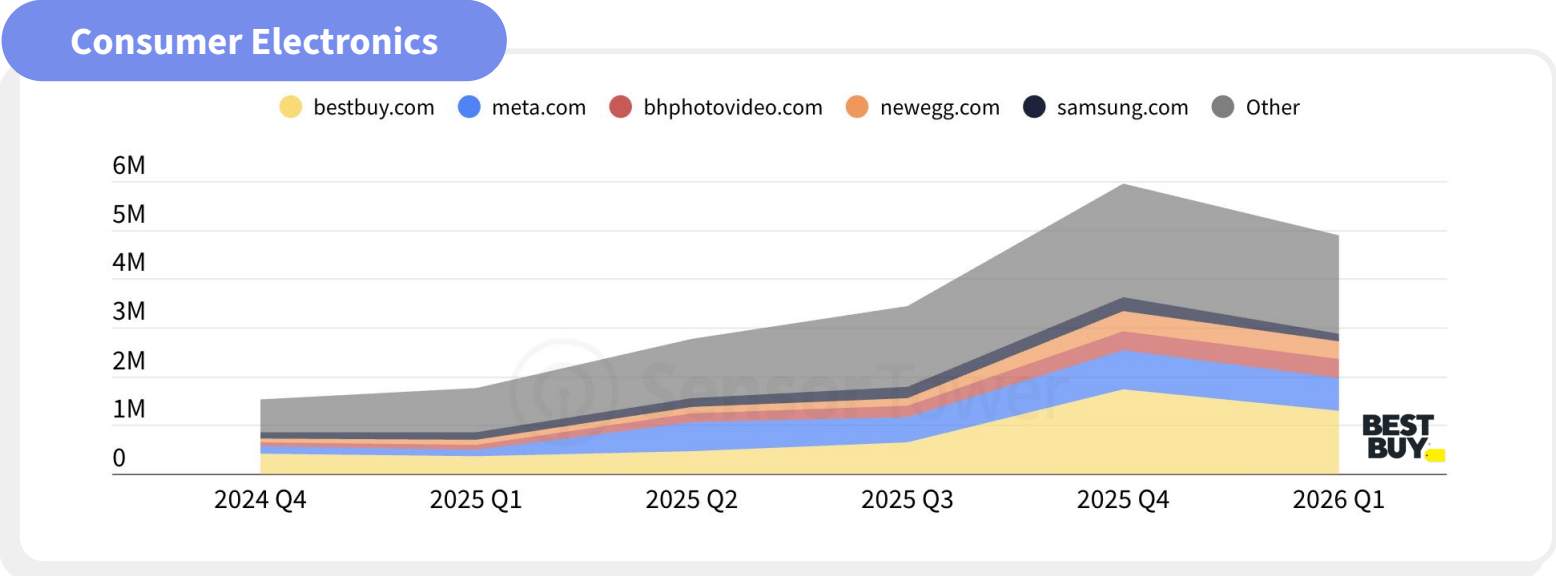
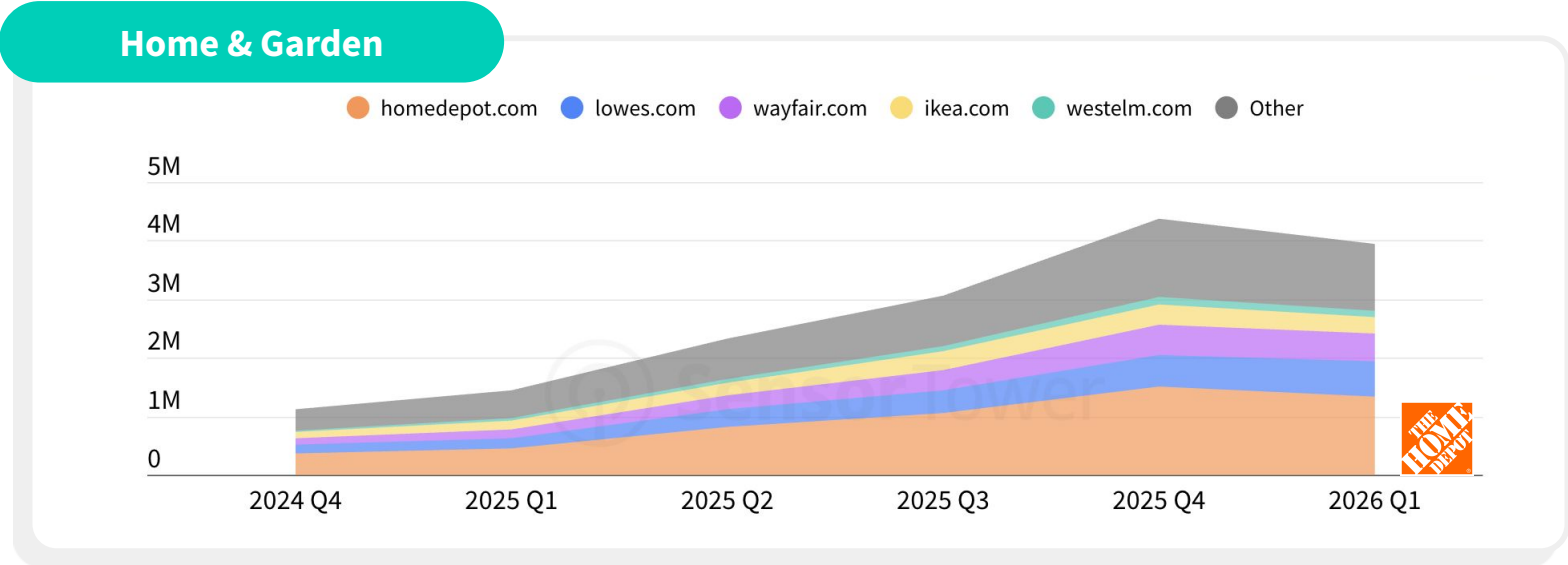
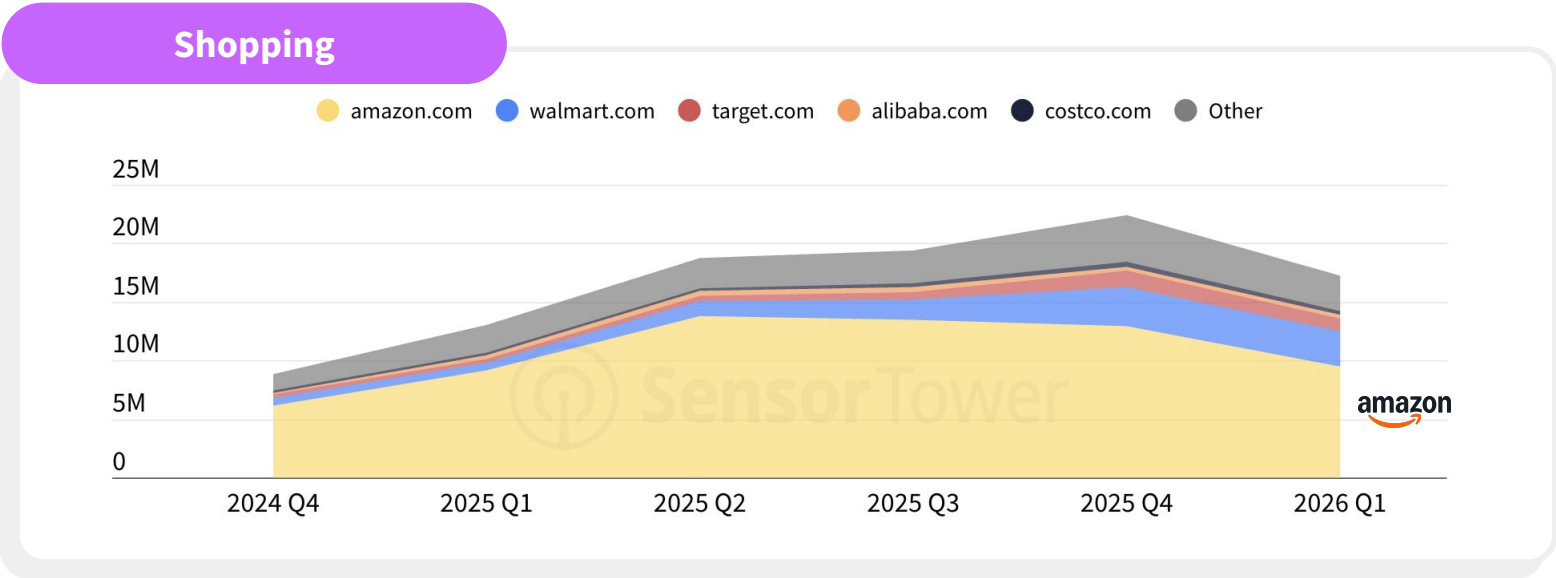
Consumer Electronics



Home & Garden



GenAI Traffic to Websites Among Top 50 Sites Shows Room to Grow



AI Assistants: De Facto Shopping? Or Budding Potential?

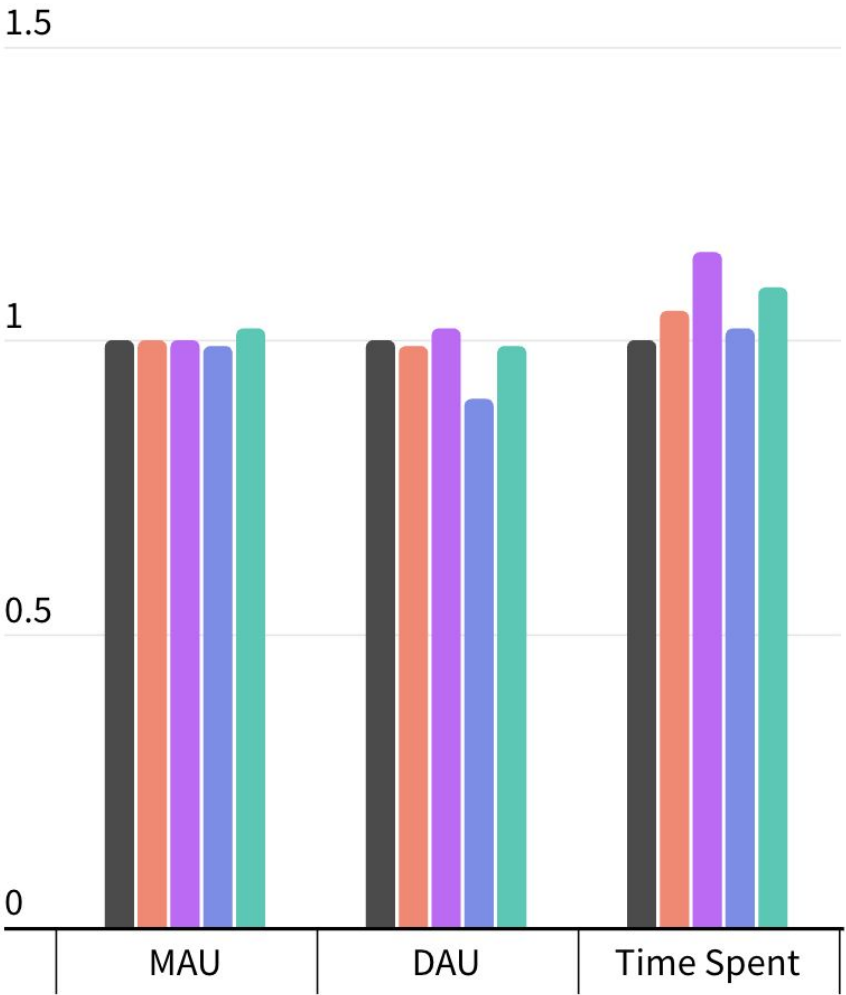
Walmart's Sparky
Makes Strides

AI Shopping Assistant Adoption Growth Over Time in the United States

Indexed vs. December 2025

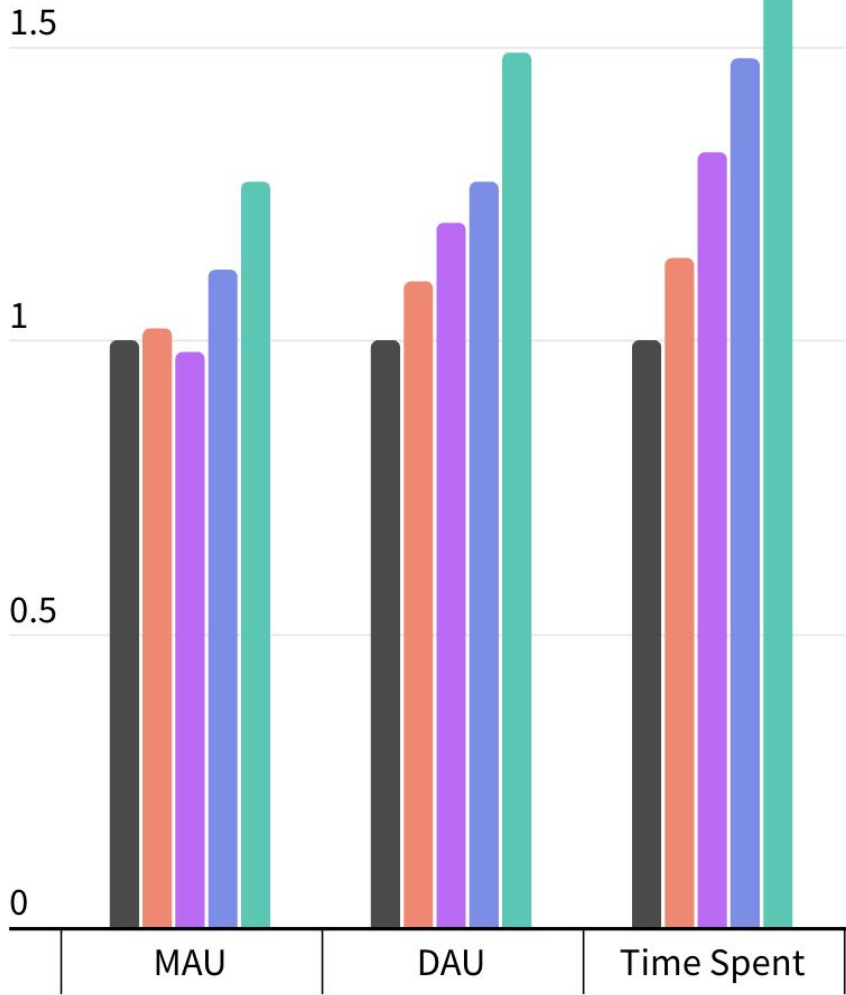
Amazon Rufus

December 2025 January 2026 February 2026
March 2026 April 2026



Walmart Sparky

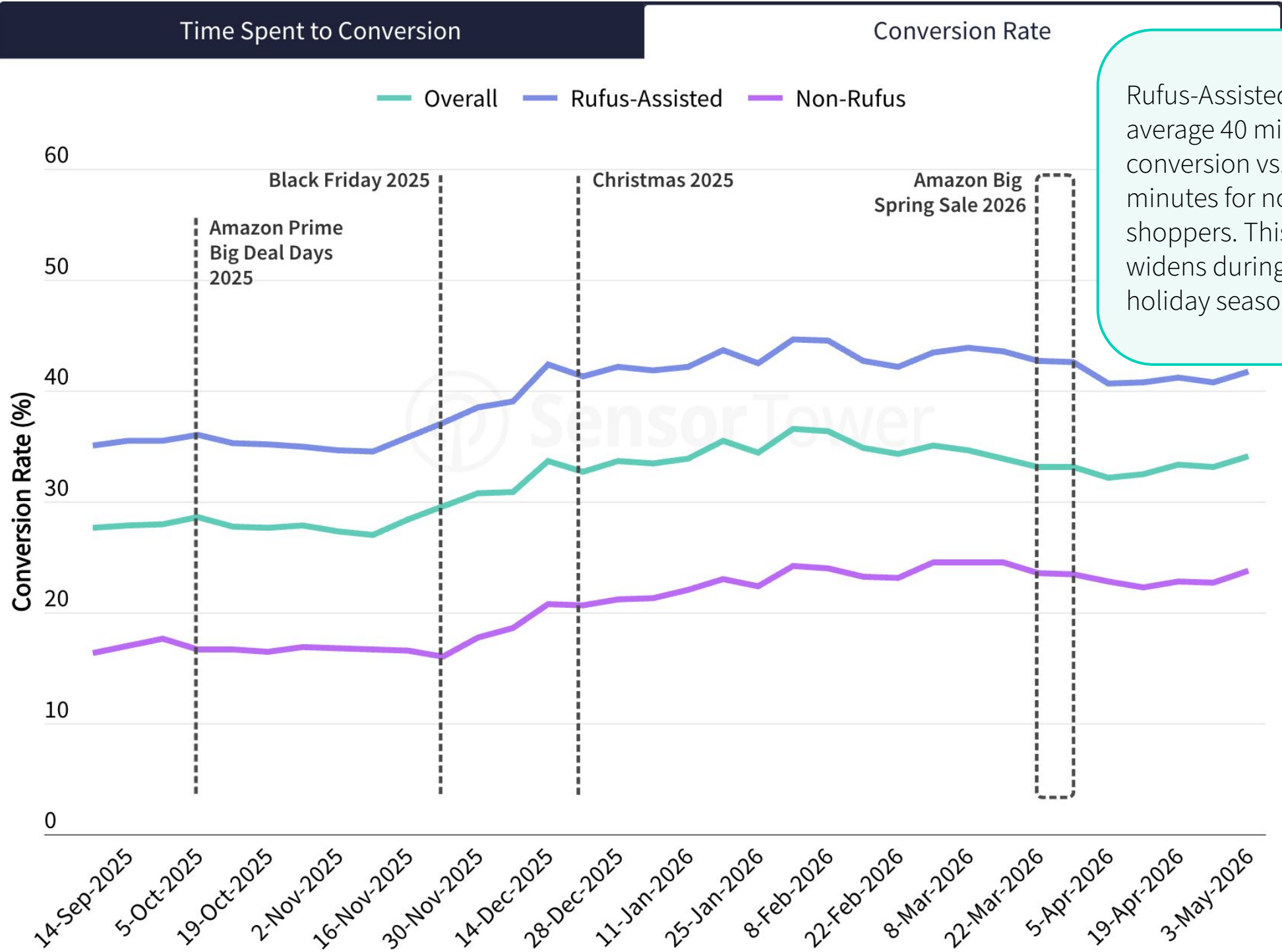
December 2025 January 2026 February 2026
March 2026 April 2026



AI-Assisted Shoppers Spend More Time and Convert at Higher Rates

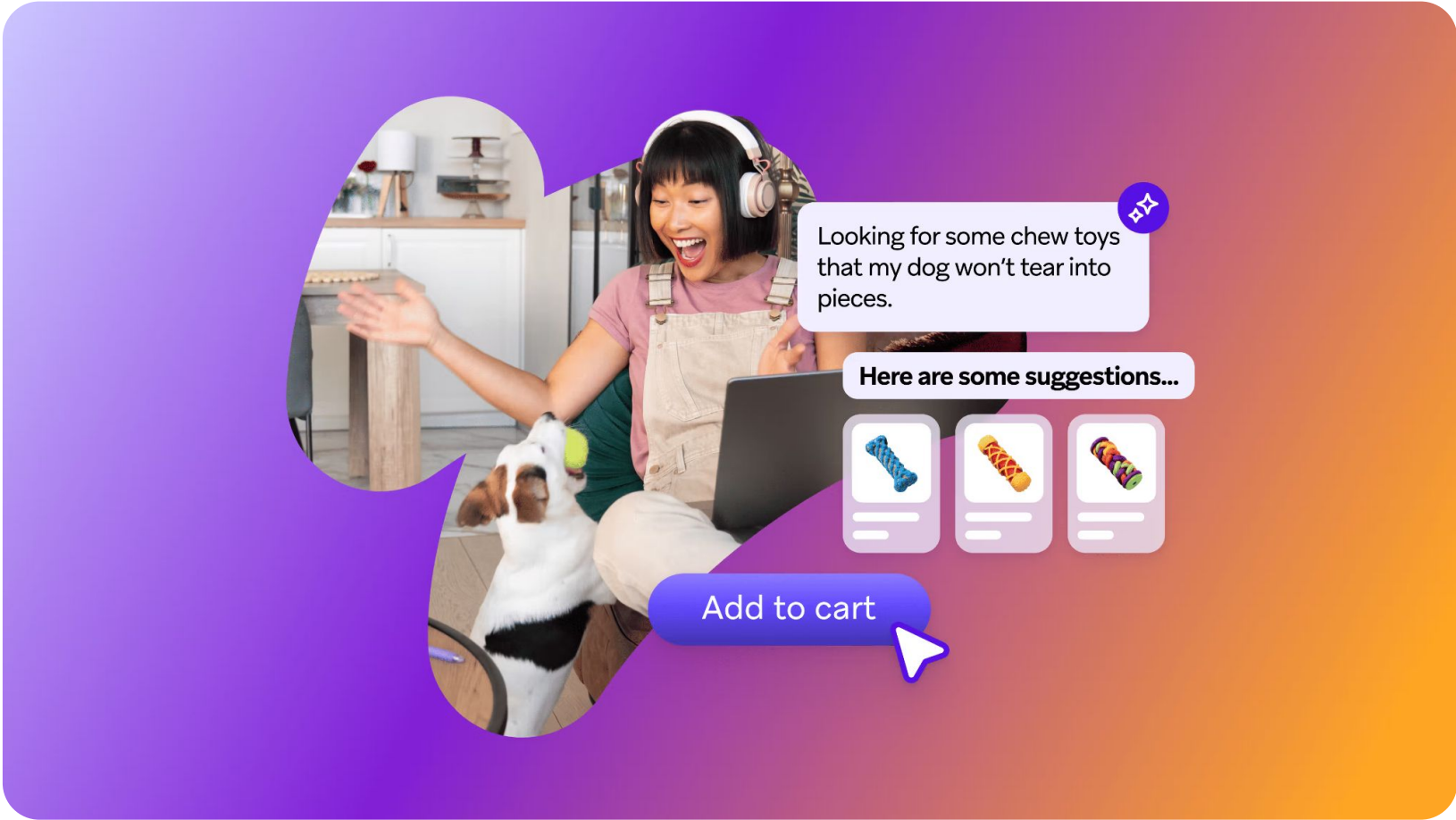
Spikes During Holiday Deal Shopping

Rufus vs Non-Rufus Time Spent to Conversion and Conversion Rates
United States



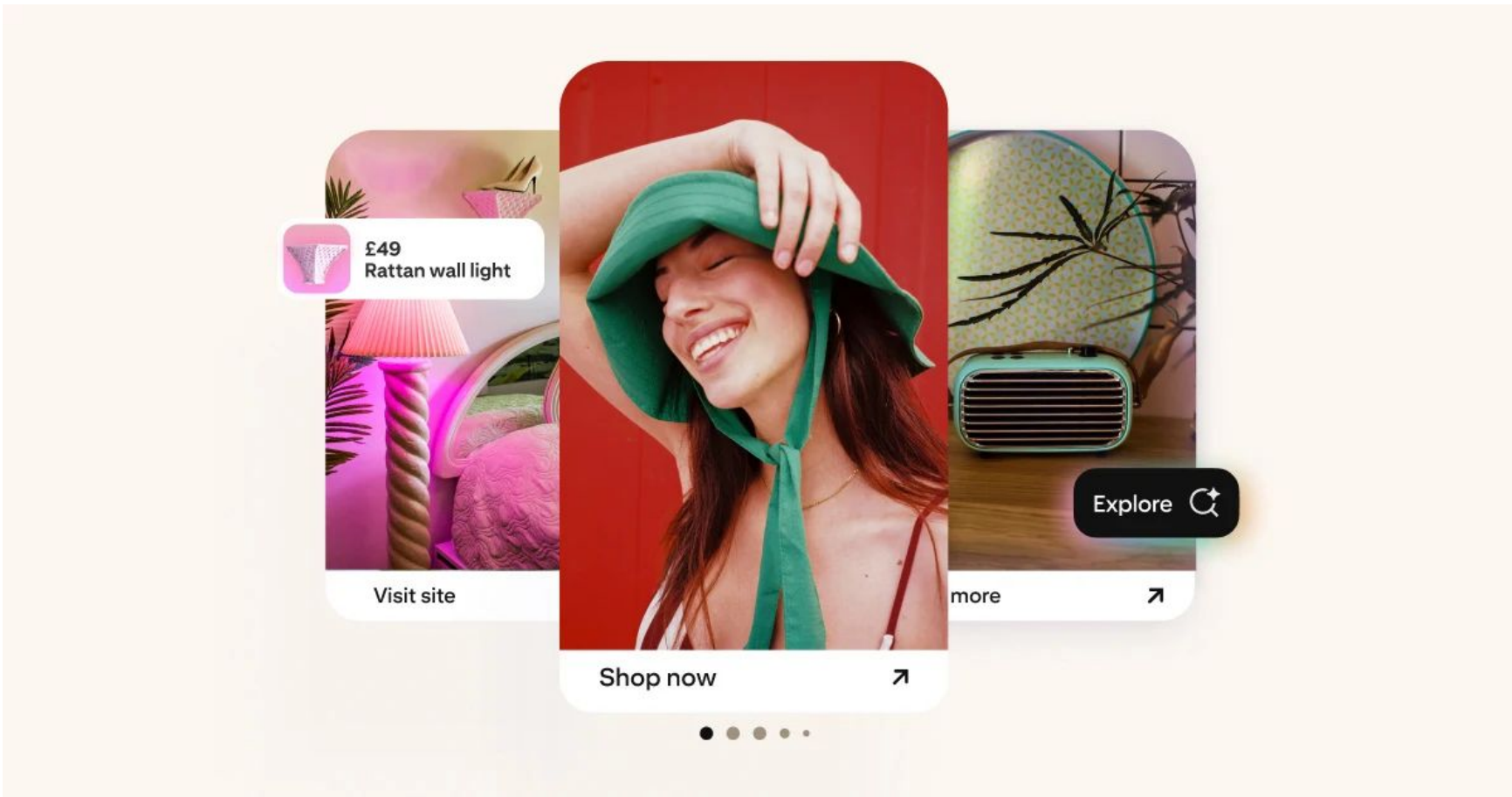
Disrupting Shopping: What's to come?

Agentic Commerce



Source: Braze

Ads for AI Agents



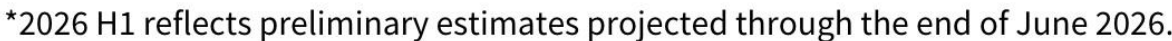
Source: Pinterest

Moving Beyond Discovery: **AI Marketing Goes Mainstream**



But 88% of Downloads
Still Come From Apps
That Don't Mention 'AI'

But 88% of Downloads
Still Come From Apps
That Don't Mention 'AI'



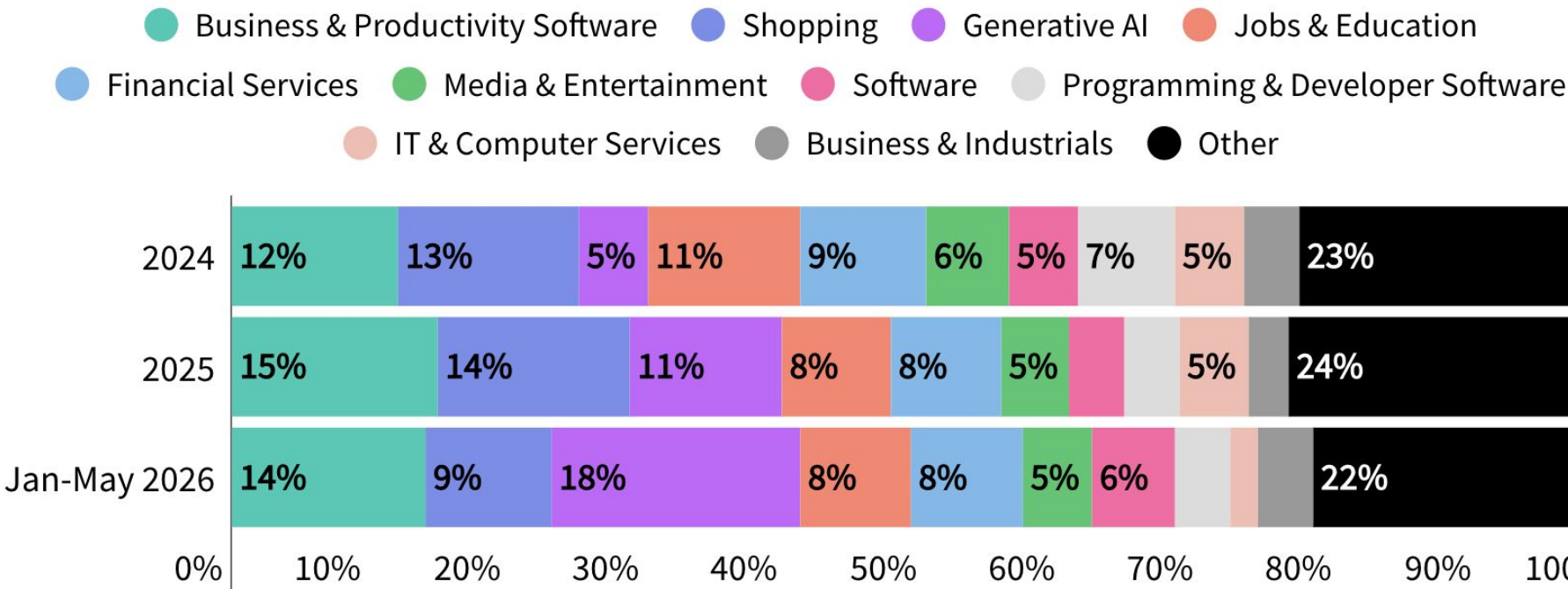
Digital Ad Spend on Creatives with ‘AI Terms’ Grew 48% YoY

Gen AI Took Over Share of Ad Spend and Impressions

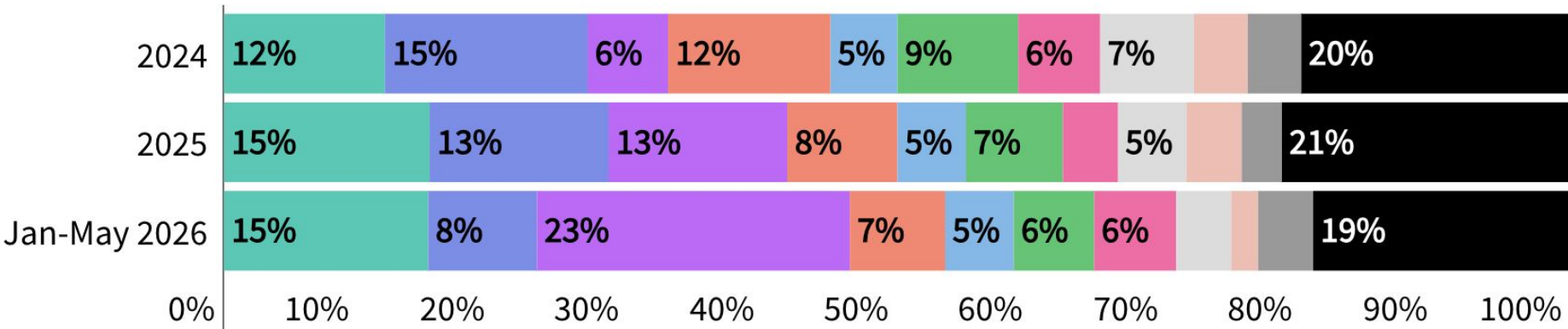
Category Breakdown for Digital Advertising with AI-Related Terms

United States

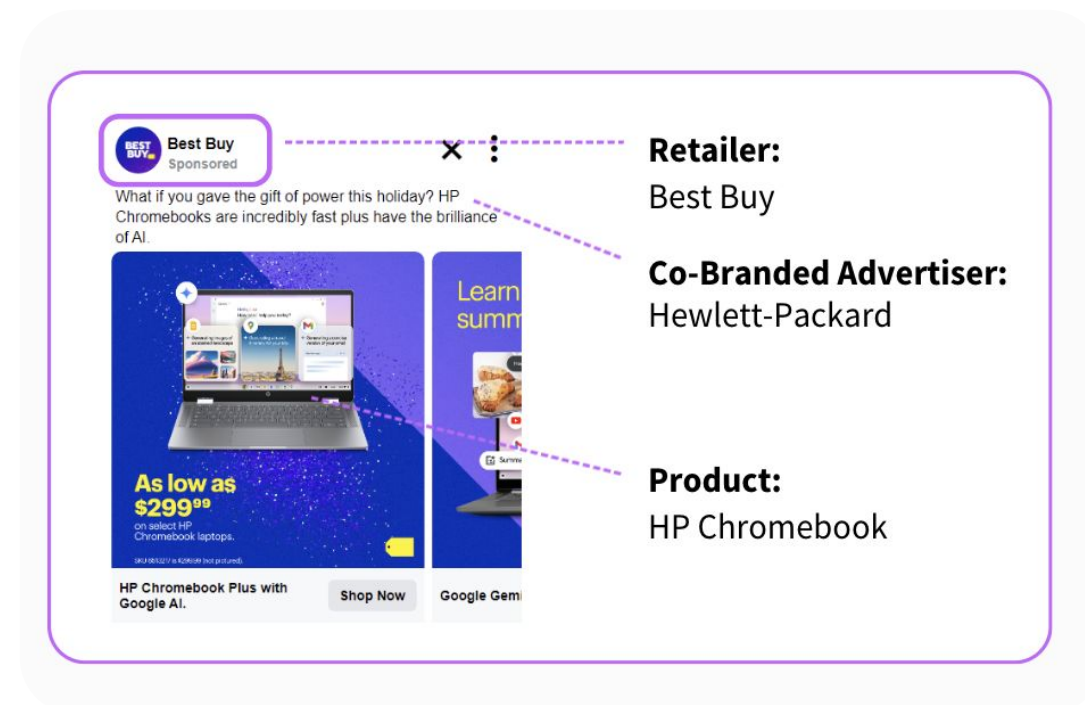
Ad Spend



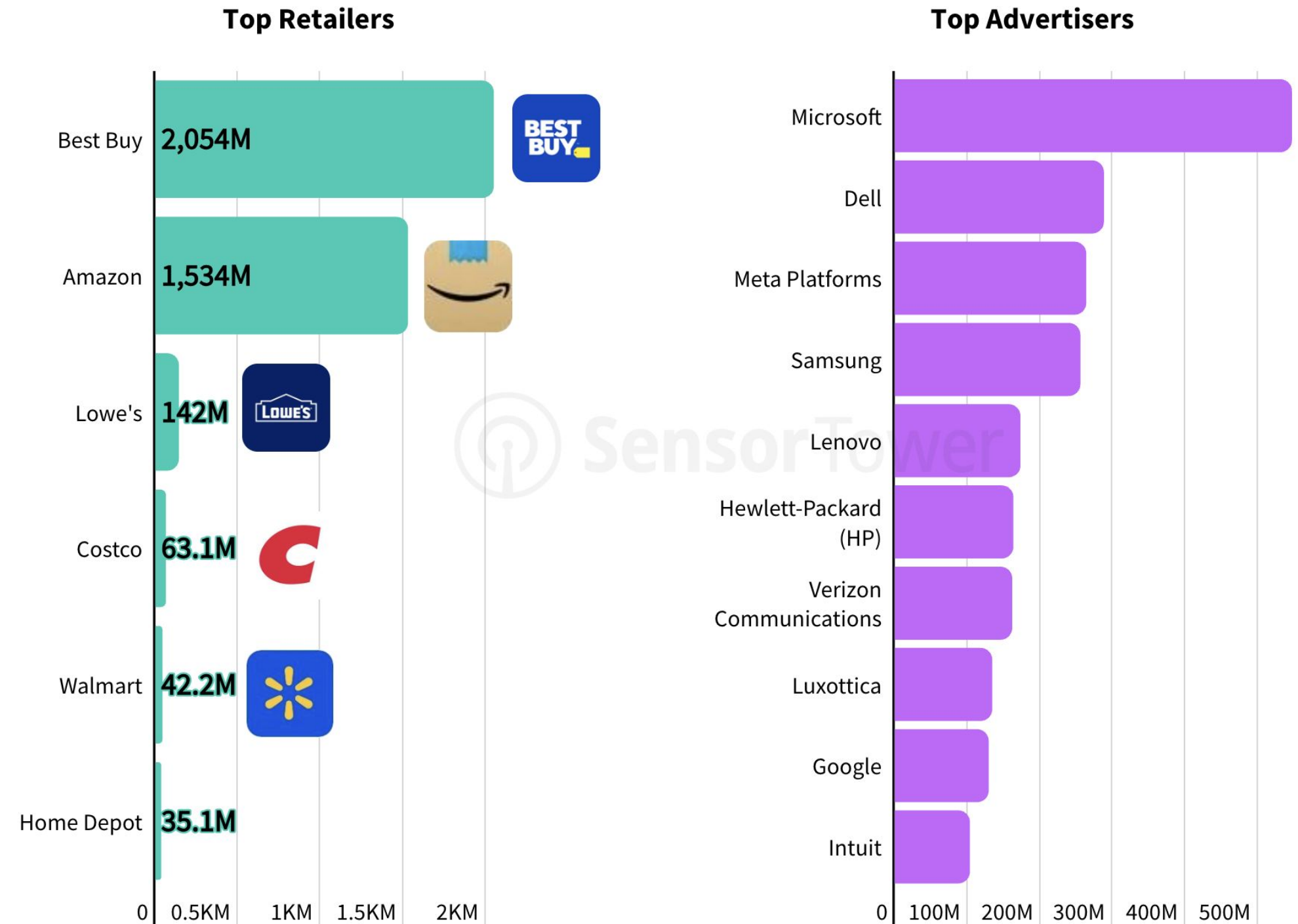
Ad Impressions



Consumer Electronics Adopts Ads with 'AI' Terms



Top Retail Media Retailers and Advertisers by Impressions Mentioning AI
May 2025 - April 2026 in the United States



A First Look at: **ChatGPT Ads**

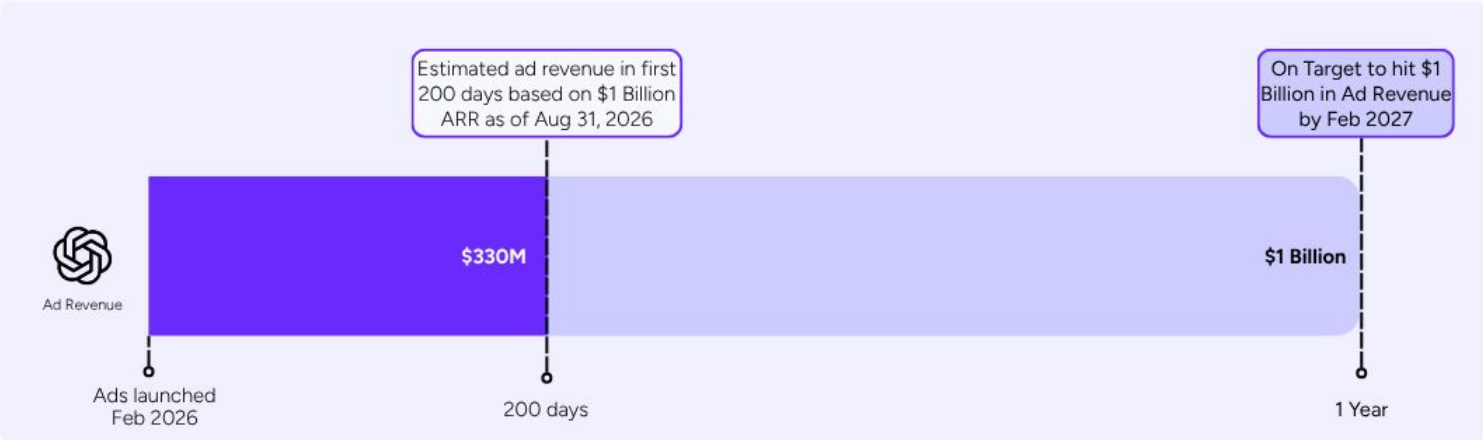


ChatGPT Surpassed \$1 Billion Annualized Ad Revenue

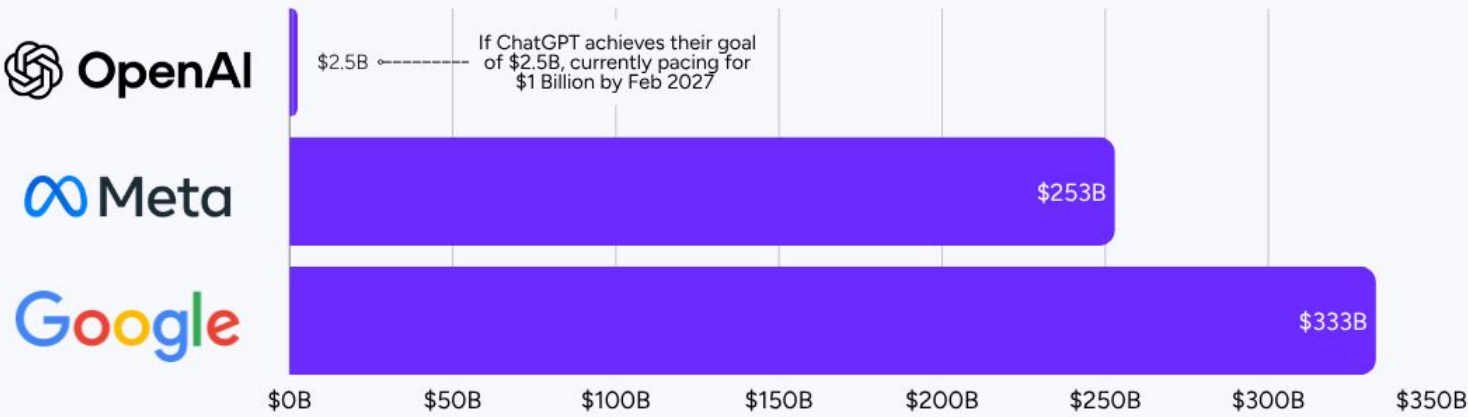
What's to Come?

ChatGPT is on Track to Generate \$1B in Ad Revenue Over 12 Months

ChatGPT's \$1 Billion Ad Revenue Run Rate Visualized



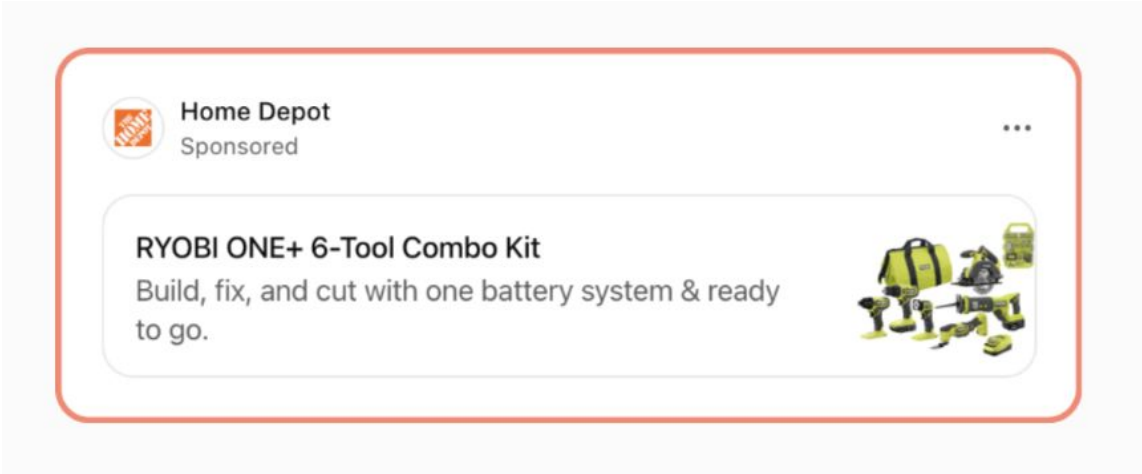
Putting this in context
Forecasted 2026 Ad Revenue



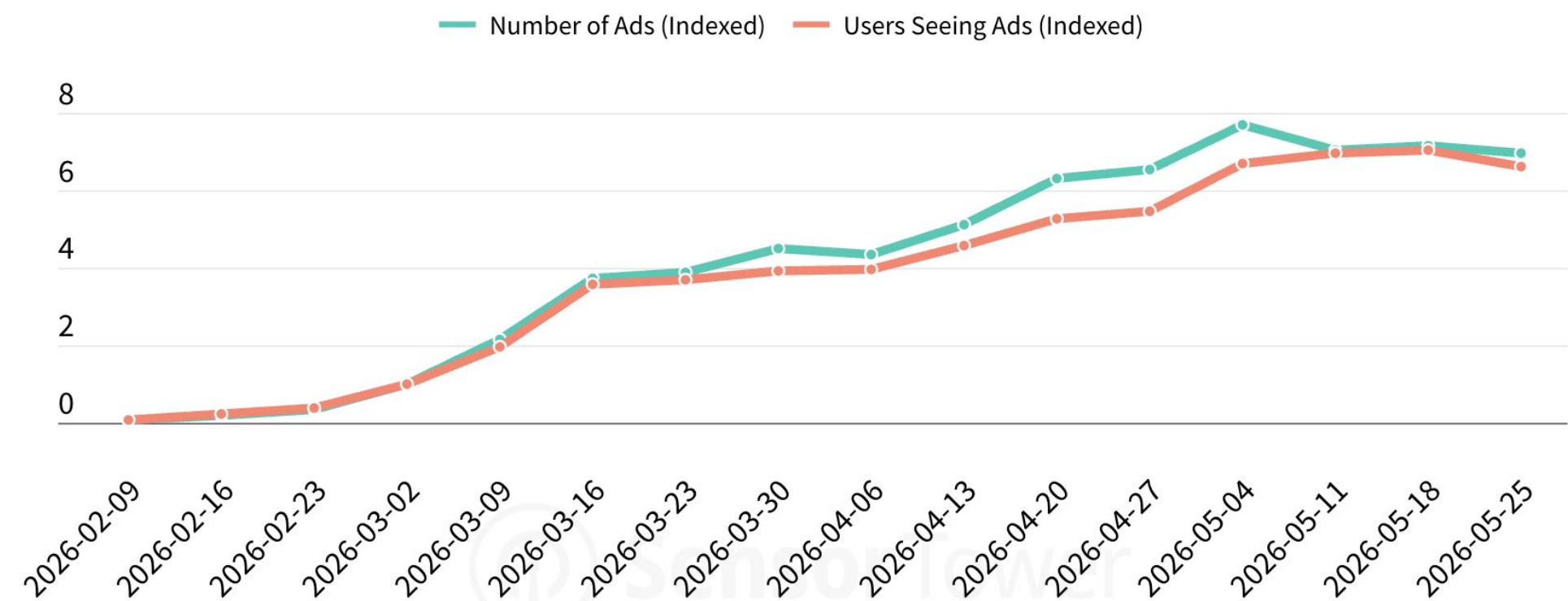
Source: OpenAI, Digiday, Company Filings; The ATTN Economy analysis
Note: Forecasted 2026 ad revenue figures, ChatGPT ad revenue goal self-reported by OpenAI

ChatGPT Increased Number of Ads and Number of Users by 7x

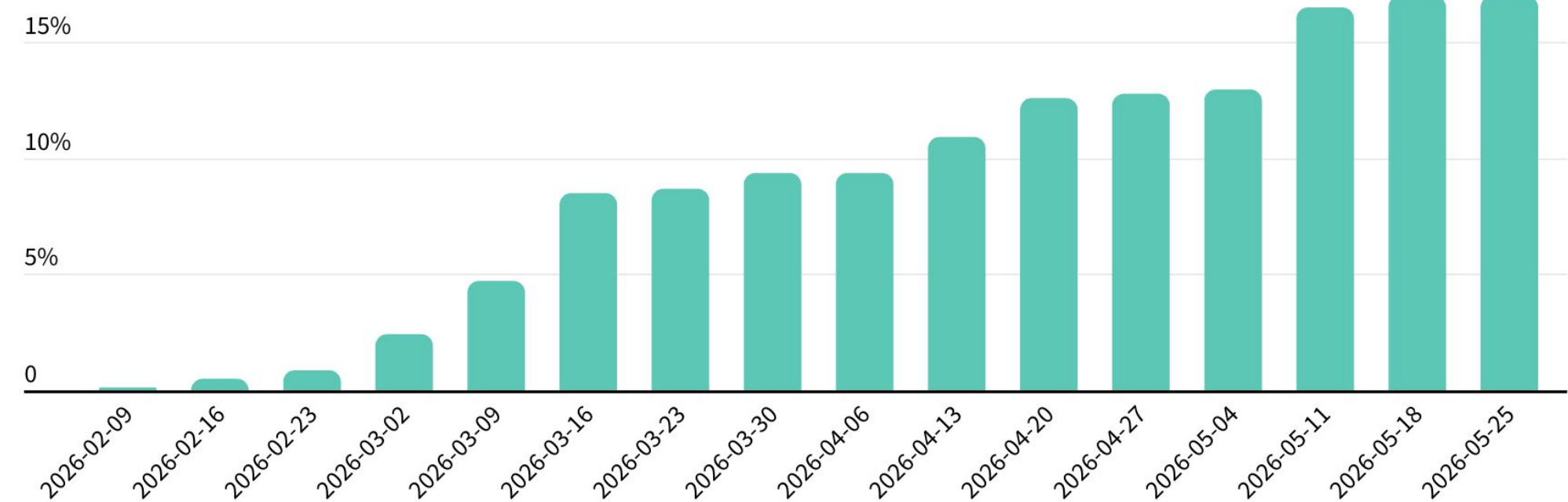
After 6 months,
17% of User See Ads



Weekly Ads for ChatGPT in the United States
Indexed to the First Week in March



Average Daily Share of Users with Ads

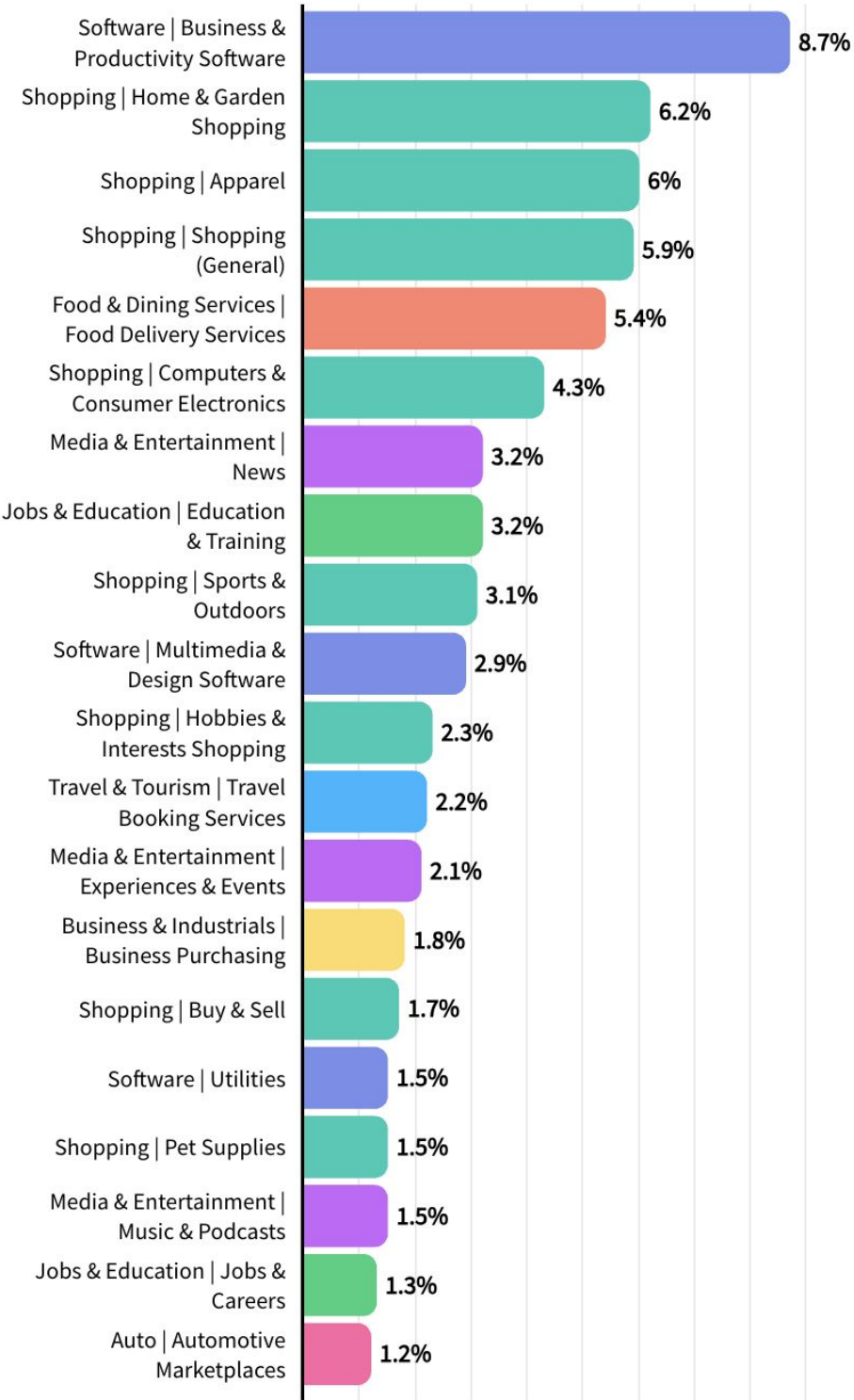
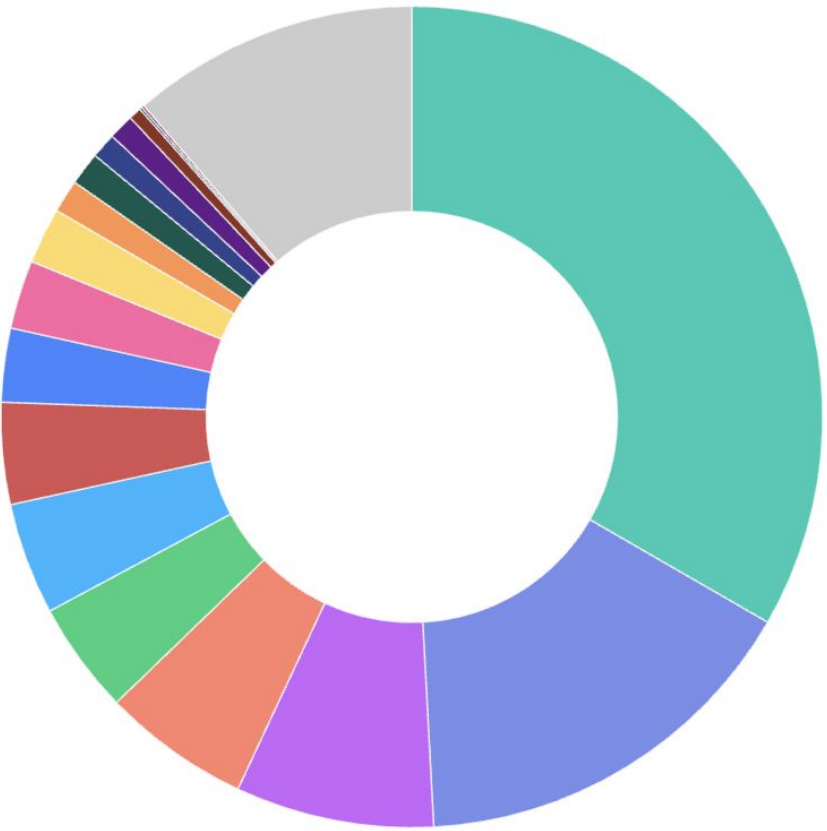


Software and Shopping Were Early Adopters of ChatGPT Ads

But Large Spread of
Industries Jumped
On Board

Top Genres and Subgenres for ChatGPT Ads

February 11 - May 27, 2026



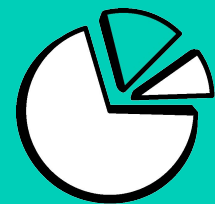
ChatGPT Vs Other Channels

ChatGPT is Second Only to
Pinterest for its Share of
Retail Brands Advertising

Share of Ad Impressions by Category for ChatGPT and Top Social Chanel														
February 11 - May 27, 2026														
Ad Channel	Shopping	Software	Media & Entmt.	Consumer Packaged Goods	Financial Services	Jobs & Education	Health & Wellness	Food & Dining Services	Gaming	Travel & Tourism	Business & Industrials	Auto	Telecom	Lifestyle & Services
 ChatGPT	33.3%	15.8%	7.8%	1.3%	4.0%	4.4%	1.3%	5.8%	0.5%	4.4%	2.2%	2.7%	1.0%	2.9%
 Facebook	30.6%	5.7%	11.3%	10.6%	5.2%	5.8%	6.0%	4.4%	2.6%	4.4%	2.3%	2.6%	1.2%	0.8%
 Instagram	27.0%	4.3%	10.6%	15.2%	5.0%	7.1%	6.1%	5.0%	3.4%	3.6%	2.0%	2.1%	1.0%	0.6%
 LinkedIn	5.3%	30.4%	4.5%	1.4%	14.1%	10.3%	5.0%	0.5%	0.3%	2.3%	13.1%	1.4%	0.9%	0.2%
 Pinterest	43.4%	1.7%	4.8%	19.5%	7.2%	0.3%	5.0%	1.5%	0.4%	4.4%	0.4%	3.0%	2.0%	0.5%
 Reddit	12.2%	23.0%	10.0%	3.5%	10.4%	7.6%	6.9%	1.5%	6.7%	3.1%	2.5%	3.1%	3.1%	0.4%
 Snapchat	19.1%	2.9%	18.0%	13.6%	6.7%	4.4%	3.3%	10.2%	5.3%	4.0%	1.4%	0.7%	3.7%	0.2%
 TikTok	18.8%	5.0%	13.7%	20.8%	7.9%	2.6%	4.1%	6.1%	5.3%	3.9%	1.1%	1.6%	1.9%	0.3%
 X	12.5%	13.9%	17.8%	4.6%	16.0%	1.9%	2.5%	3.1%	9.7%	2.3%	3.7%	1.7%	2.3%	0.4%

Key Takeaways

AI Economy by the Numbers

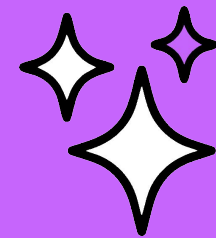


46%

ChatGPT Market Share
As of May 2026

Gen AI Wars Heat Up

Gemini and Claude make inroads and ChatGPT market share drops below 50%



2x

AI Shopping Assistant CVR
Compared to Non-AI Assistant Users

AI Assistants Transform Shopping Experience

Amazon's Rufus users maintained a CVR of 40% in Q1 2026 compared to 20% for non-Rufus Users



\$4B

Gen AI Consumer Spend
Through IAP Monetization

Professional Functionality Drives Monetization Growth

Claude ARPU grows 5.5x from \$0.50 to \$2.76 by focusing on professional use case



17%

ChatGPT Ads
Percent of US User Base Seeing Ads

Early Days but Hit \$1 Billion Ad Revenue Run Rate

ChatGPT Ads have grown 7x in number of ads and number of users seeing ads - only the beginning

Q&A



State of AI 2026 Report

How AI is changing discovery,
shopping, advertising, and more.



Scan to download
the full report.

