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Rapid Response

Ads in AI

Platforms and brands testing scalable ad-funded AI

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WE Create WHAT'S NEXT

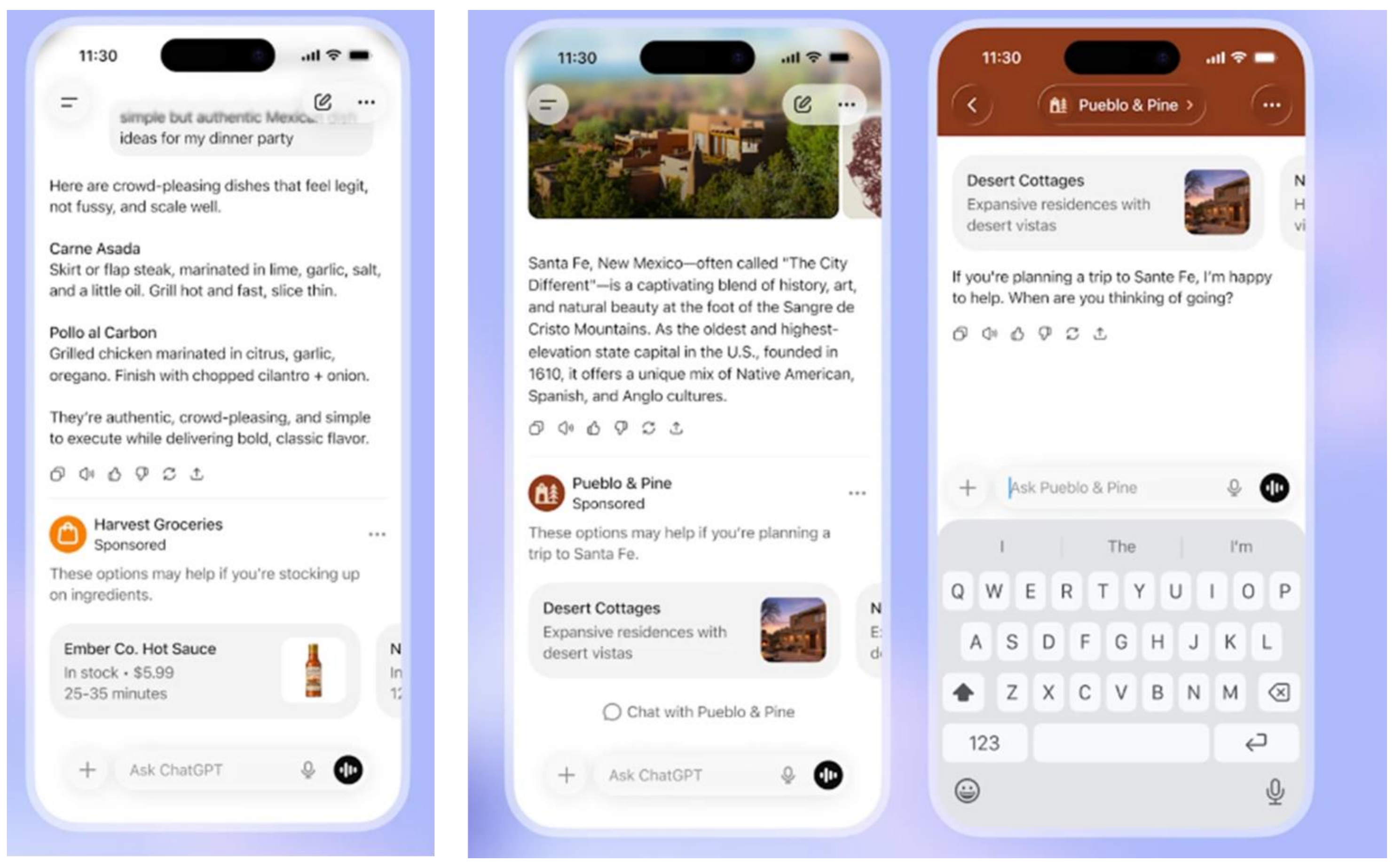
Ad funded models will define the next phase of AI impact

Ads in ChatGPT

Seven days ago, after much speculation, OpenAI announced a test of ads in ChatGPT. Initially, on the free tier and a lower-cost plan (in the US-only), while keeping higher-priced subscriptions ad-free.

The need for a scalable ad model in AI assistants has been clear for some time. ChatGPT is nearing 900m weekly active users as of the end of 2025, around 95% of whom are on the free plan, so a workable ad model is urgently needed

Ad models in AI are proving not be simply plug and play – Perplexity's early tests were paused in late 2025.



ChatGPT ads will be clearly labelled, appear adjacent to responses, rather than embedded in them, and be designed not to influence the assistant's answers.

OpenAI has emphasized guardrails around privacy and trust, including limits on personalization, exclusion of sensitive categories, and commitments not to sell individual conversation data to advertisers.

OpenAI expects to make 'low billions' in ad revenue this year before scaling significantly thereafter. By 2030, an estimated 8.5% of a projected 2.6bn users will be on paid tiers-advertising will be the main funding mechanism for over 2.3bn users. Of 2.5bn daily queries on ChatGPT, around 20% relate to seeking information, with 2.1% of all queries relating to purchasing products. This Omnicom Media paper explores the opportunity in detail

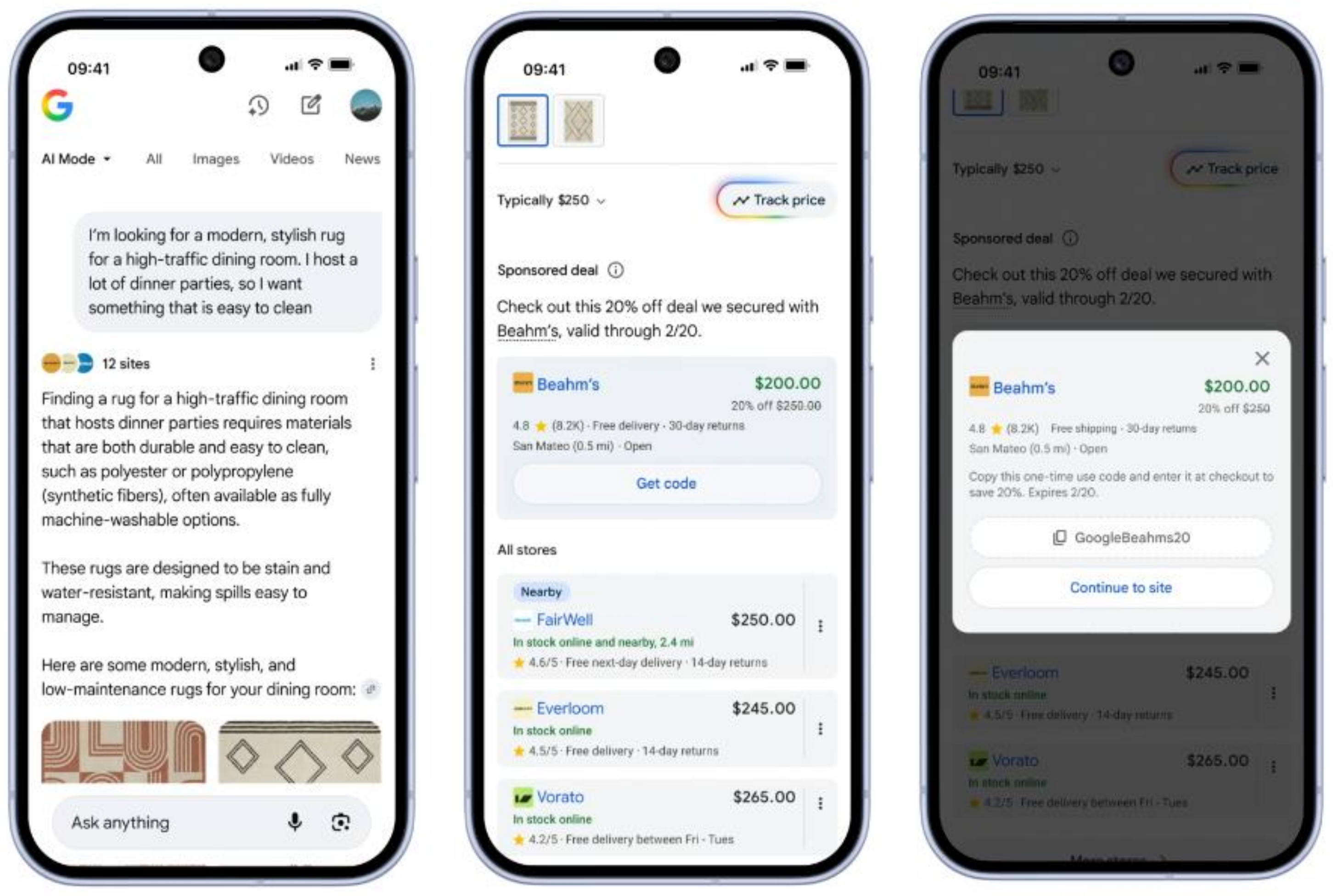
The primary topics of debate between the platforms relate to where ad experiences sit: inside or below answers, inside shopping journeys, and increasingly as agent-like flows that compress research-to-purchase.

The decisions made and the findings of tests this year will impact brand strategy, measurement, brand safety, and creative approaches for a long time to come.

A Range of Approaches

Each of the platforms also has a view on how best they can leverage their scale, salience, distribution, permissions, and integration with different commercial behaviors.

Google is taking a different path to OpenAI, accelerating AI-native ad formats inside search AI experiences rather than in Gemini itself.



Direct Offers shows ads appearing within AI mode conversations when users display strong purchase intent, effectively turning the assistant into a deal-negotiation layer rather than a referral engine.

It is currently being refined with select partners, working alongside PMax and shopping campaigns as a specific product view to drive incremental sales. The AI will select when to show specific offers that have been defined in the merchant center feed based on modelled intent.

Promotional strategy will need to navigate possible perceptions of price gouging; however, Google does strictly prohibit showing higher pricing than available directly on a brand's website.

AI is increasingly influencing commerce decisions. Amazon Rufus appeared in 38% of US shopping sessions, influencing USD 14.2bn in sales during Black Friday in 2025.

Customers using Rufus are 60% more likely to complete a purchase than those who don't. These sponsored placements influence what gets considered at all, not just which link gets clicked.

Together, these models suggest a future where AI advertising is less about buying space and more about earning inclusion in decision-making flows.

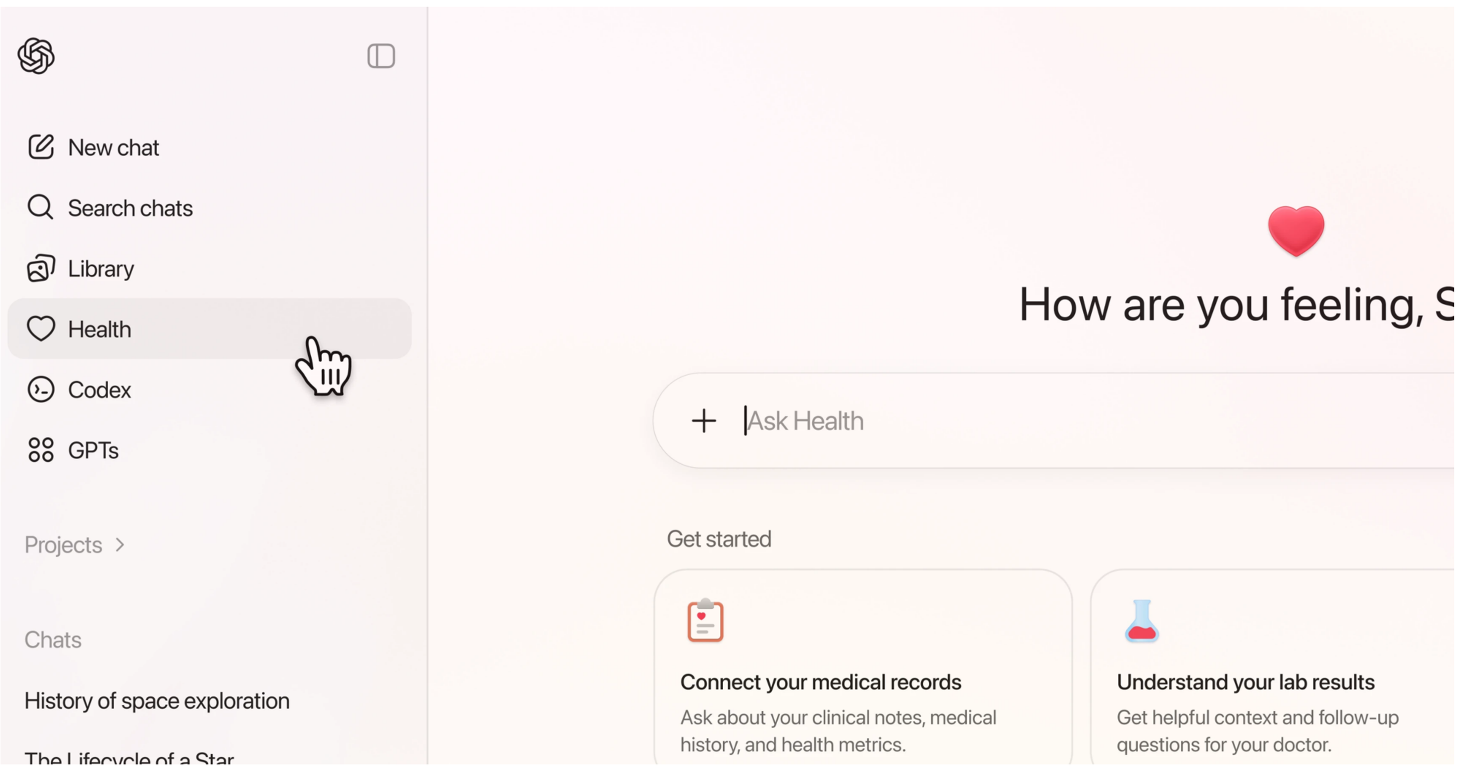
It is not just about appearing in AI-mediated marketplaces, where most value can be captured by the AI. There is a developing role for comms strategy further up the funnel to influence how needs are expressed and capture permissions to access personal data and intent to deliver greater value to the consumer.

Ads and Trust

AI has for many years been utilized to model intent and predict behaviors to drive greater attention, personalization, and performance. User interactions with AIs are delivering another rich source of data.

Meta has indicated that engagement with its AI experiences can inform ad personalization across Facebook and Instagram, using conversational behavior to enrich existing ad systems rather than just inserting ads directly into chat.

There is a looming battle between the AI platforms for 'personal context', i.e., the ability to process and use information already stored as chats, searches, mails, markdowns, views, and purchases.



ChatGPT Health, Google Personal Intelligence, and the various connectors on all AI systems are all recent examples or enablers of personal context. They make the service more useful to users, as outputs reflect their needs, but also lock users in as beyond a critical mass, consumers will find it hard to reconnect complex contexts.

Brands will need to understand the structure and utility of these new personal contexts, for example, building a specialist GEO capability that works with health contexts.

We are already seeing a significant shift in search behavior, and we expect new agentic technologies to impact purchase behavior this year. Over the next quarter, we can expect rapid iteration toward interactive commerce units, tighter consent frameworks and deeper use of personal context.

It is imperative to test formats and approaches to maximize opportunity and minimize disruption.

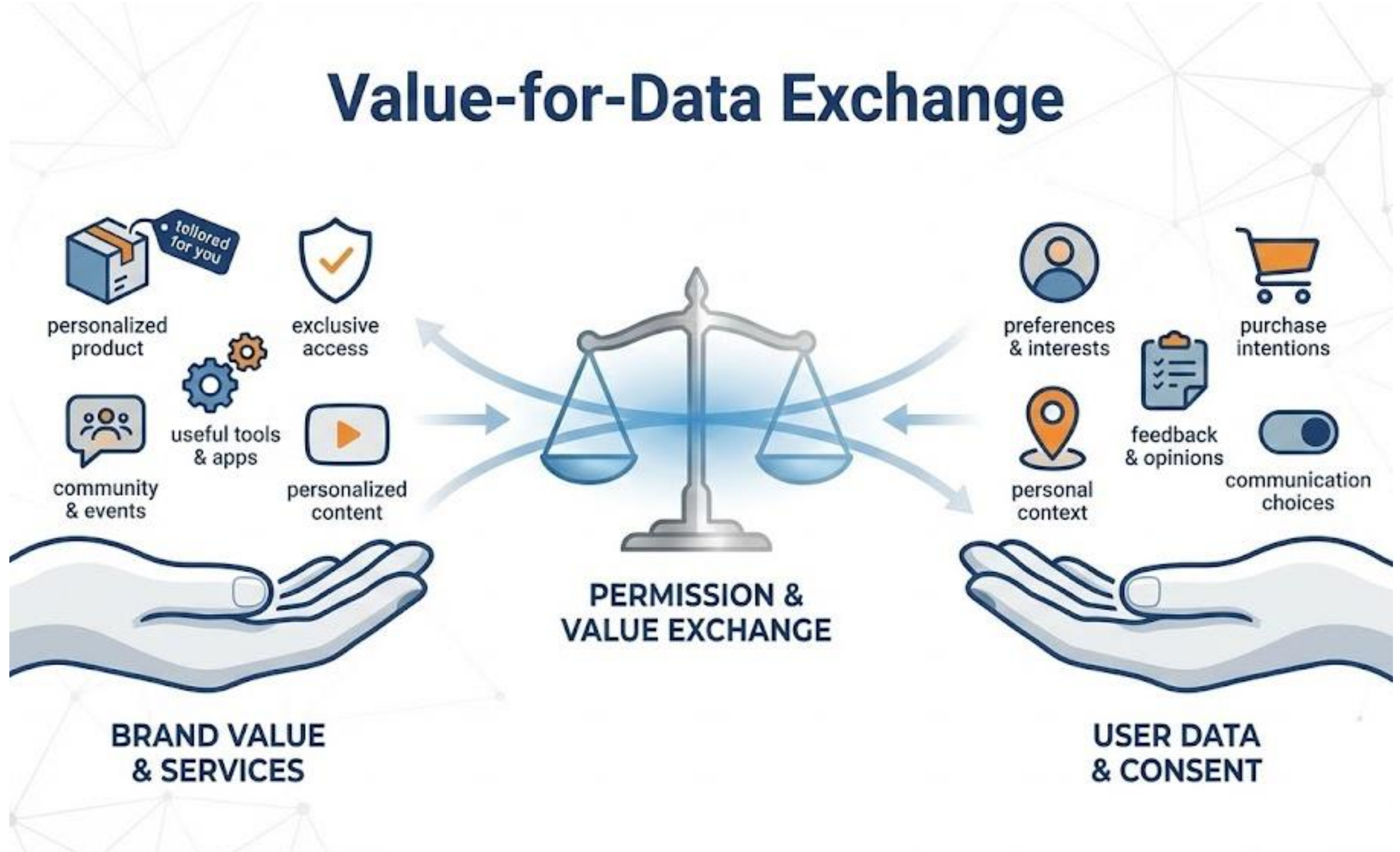
Tests should consider:

- Optimizing to learning velocity over immediate uplift.
- Focusing on high-intent journeys where AI already plays a role.
- Designing incrementality-first experiments with holdouts and matched markets.
- Building model-readable assets (structured attributes, proof, flexible offers).
- Keeping creative trust-safe and transparent.

Brand Permission Strategy

Brands will not only need to understand how to work in a set of new platform-defined contexts but also develop contexts and permissions of their own as a significant lever of differentiation.

We have long characterized these as permission strategies, i.e., the ability to gain permissions to access different forms of context based on a value exchange with the user.



Brands can innovate with AI, creating various forms of value based on 1st party user and company data and capabilities. As well as developing a new role for media to communicate this value.

Simple versions of this model, e.g., Kroger's 84.51 or Tesco Club Card, have been with us for years, exchanging data for discounts. Powering not just pricing and distribution but also retail media propositions.

We can expect more powerful concierge services, for example;

- Finance brands moving idle money around to maximize returns.
- Health brands using continuous monitoring and genetic profiles to maximize outcomes.
- Grocery brands passively monitoring household stocks to never run out.

Today's consumer may not yet be prepared for such bold moves, but the trust and intent flywheel is just starting.

A forthcoming Omnicom Media global study into changing consumer AI-powered search behaviors explores these ideas and attitudes in detail.

AI interfaces are collapsing the funnel; research, comparison, and conversion increasingly happen in a single interaction, forcing advertisers to rethink both metrics and messaging.

Brands will need expert guidance to navigate where influence begins, where trust can break, and how to scale responsibly as these capabilities mature.

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