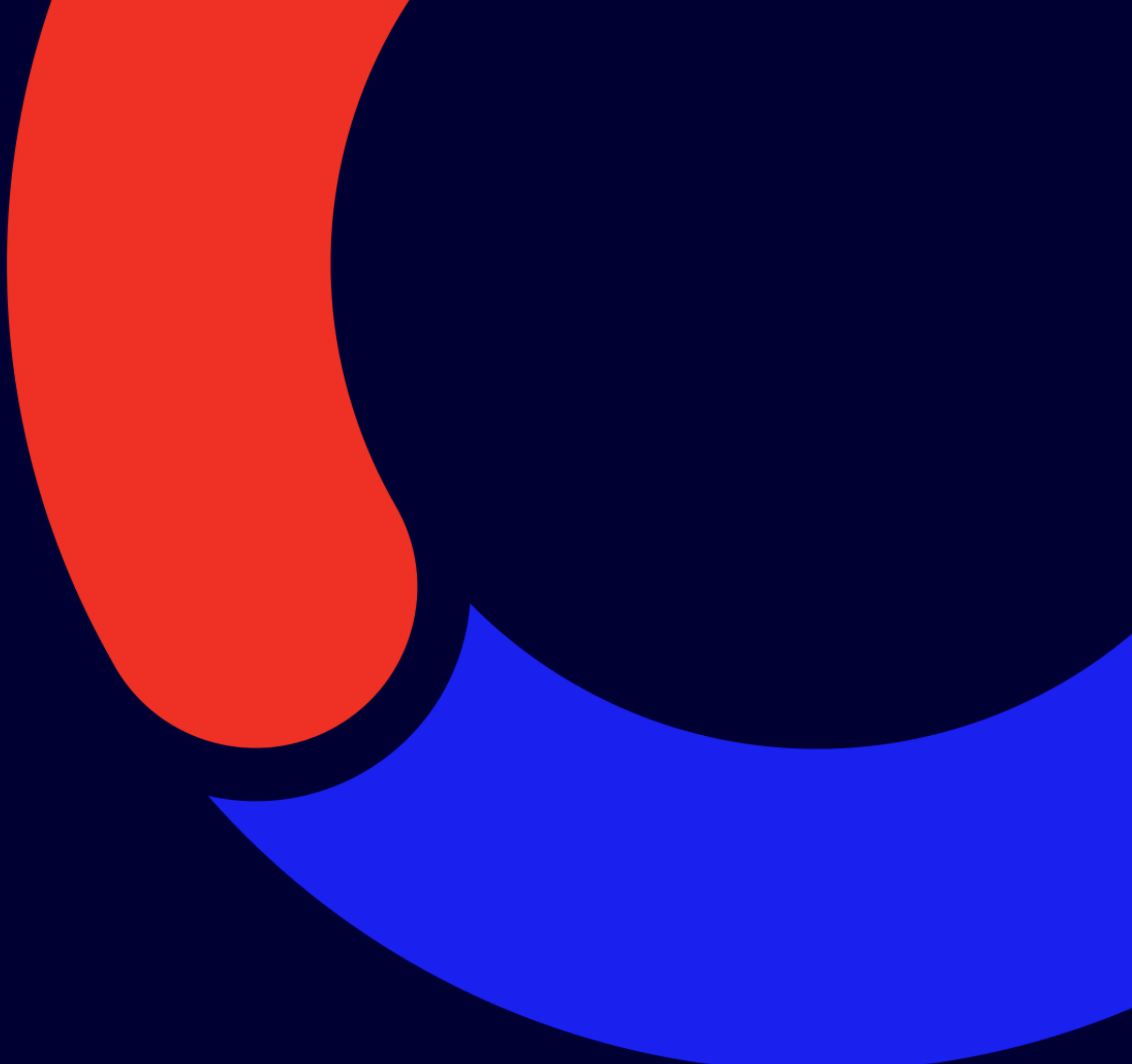




omd



# Consumer Generative and Agentic AI Adoption

Modelling the shifting structure of AI markets

Updated: March 20<sup>th</sup>, 2026



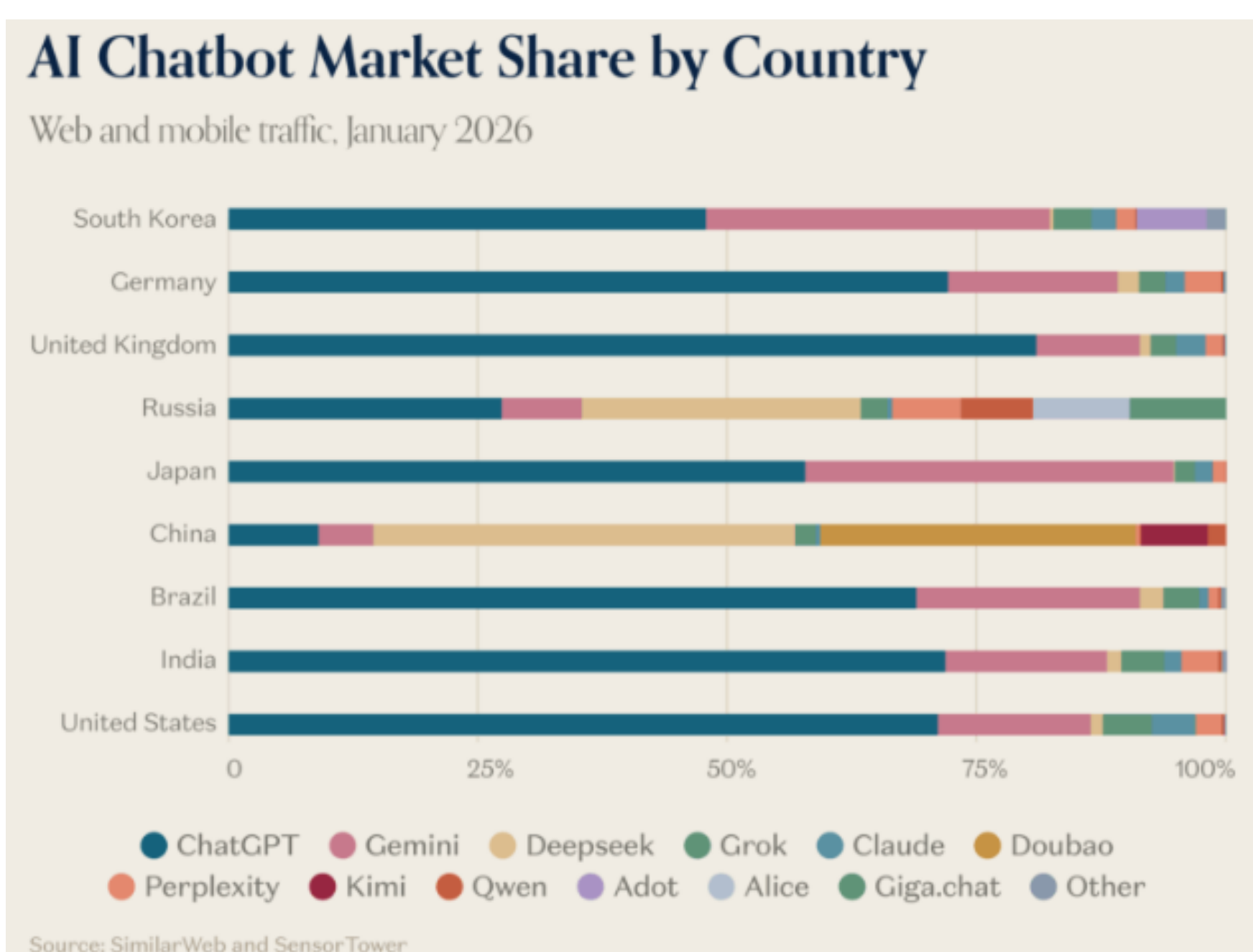
**WE** *Create* **WHAT'S NEXT**

## A Changing AI Ecosystem Shape

Over ten per cent of the global population now uses ChatGPT every week, Open AI recently announcing [900 million weekly active users](#), with 50m paying subscribers.

The recent [OM study on global generative AI search](#) behaviors highlighted that consumer AI adoption is changing shape, no longer defined by first mover advantage. Now distribution, integration and specialist utility are also driving a broader set of use cases.

These points are supported by recent data from a16z's sixth edition of its [Top 100 Gen AI Consumer Apps](#). ChatGPT leads, but the race is widening in ways that complicate any single-platform strategy, with new players in different markets. There are roughly [5x as many mobile sessions](#) per month/per user than desktop sessions, and ChatGPT users are about twice as engaged as Gemini users, with a subscriber base that is 4x larger.



Users are also no longer universally loyal to a single platform, [roughly 20% of weekly ChatGPT web users also use Gemini](#) in any given week. The OM global Generative Search study measured an average of [2.4 AI](#) applications ever used by consumers.

Claude's US paid subscriber base is [growing at over 200% year-on-year](#) and [Gemini grew 643% year-on-year](#) to become the fastest-growing AI platform by web traffic.

AI is no longer a channel to test; consumers are already here.

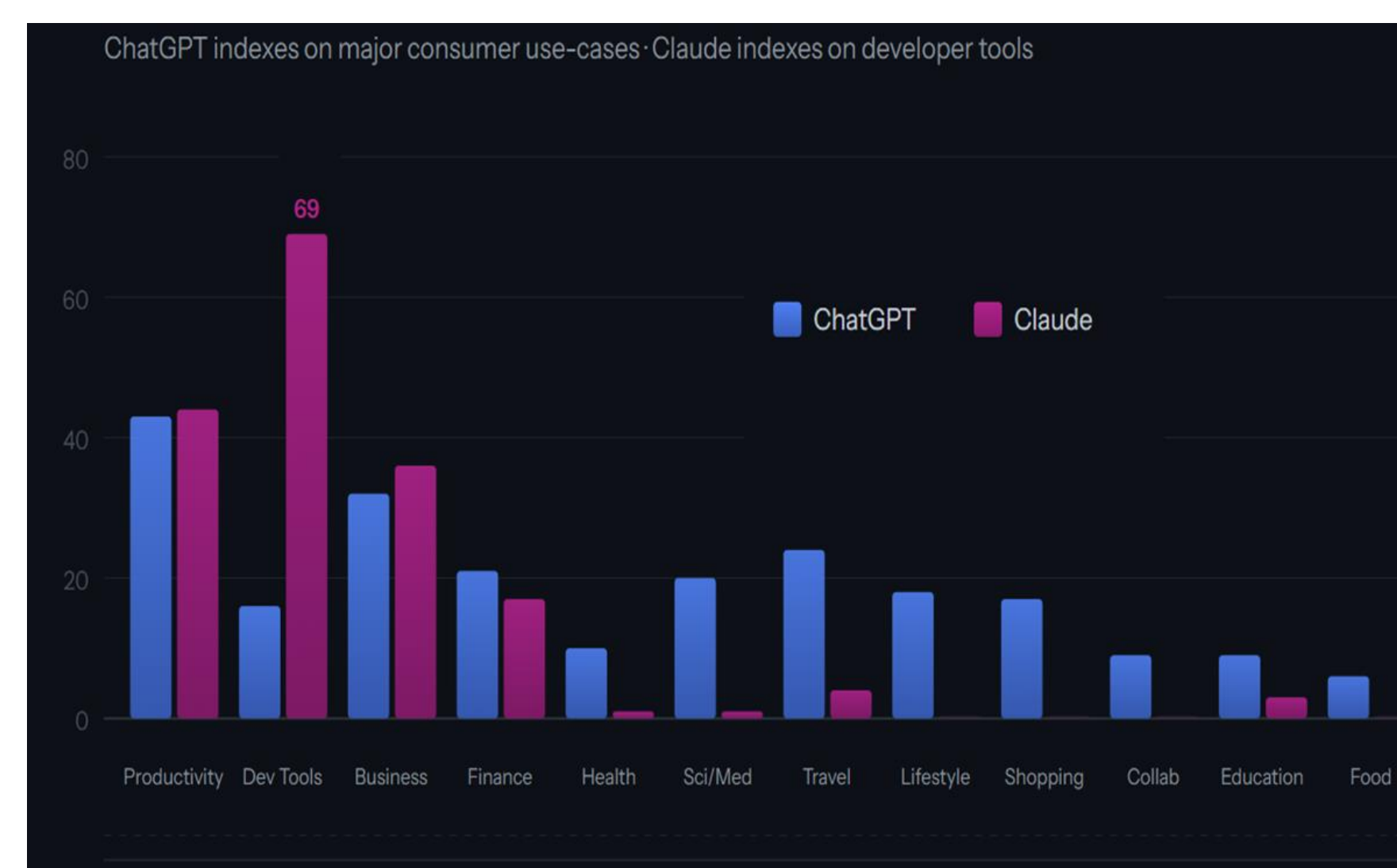
In search, brands optimized for one dominant interface. In conversational AI and GEO, they will need to be discoverable, citable, and structurally present across multiple environments simultaneously.

This is not a search-style winner-takes-all dynamic. It is closer to the mobile OS wars: two or three platforms with distinct philosophies, each building trillion-dollar ecosystems.

## The Connector Commerce Lock In

A strategically significant development is the emergence of distinct app store-like ecosystems within AI assistants.

ChatGPT now has [220 apps across 13 categories](#); Claude has approximately 160 curated connectors plus 50 community-built MCP servers. The overlap is 41 apps, roughly 11% of the combined catalogue and those are almost entirely horizontal productivity tools.



Beyond that core, the [platforms diverge sharply](#). ChatGPT has [85+ apps across Travel, Shopping, Food, Health, and Entertainment](#) consumer transaction categories where Claude has virtually zero presence.

In a recent shift in strategy, OpenAI's commerce approach has moved from a single ChatGPT checkout to enable [checkouts in third-party apps](#), as conversion rates were proving [higher on the apps](#) than the integrated checkout. This means retail brands will need to develop their own ChatGPT integrations to closet the purchase loop.

The addition of [skills to ChatGPT](#) (originally developed in the Claude ecosystem) further expands capabilities, preferences and memory, meaning that once a user connects their calendar, email, and shopping preferences, the switching cost climbs.

When an LLM has perfect memory that recalls every decision a user has ever consulted it on, the value of [context compounds](#). The more an LLM knows about the user, the better it performs, and the less likely they are to leave.

Memory is now a competitive lever, LLM providers are [launching memory import tools](#) that lets users paste their context directly in a deliberate attempt to make accumulated context portable and reduce the lock-in advantage.

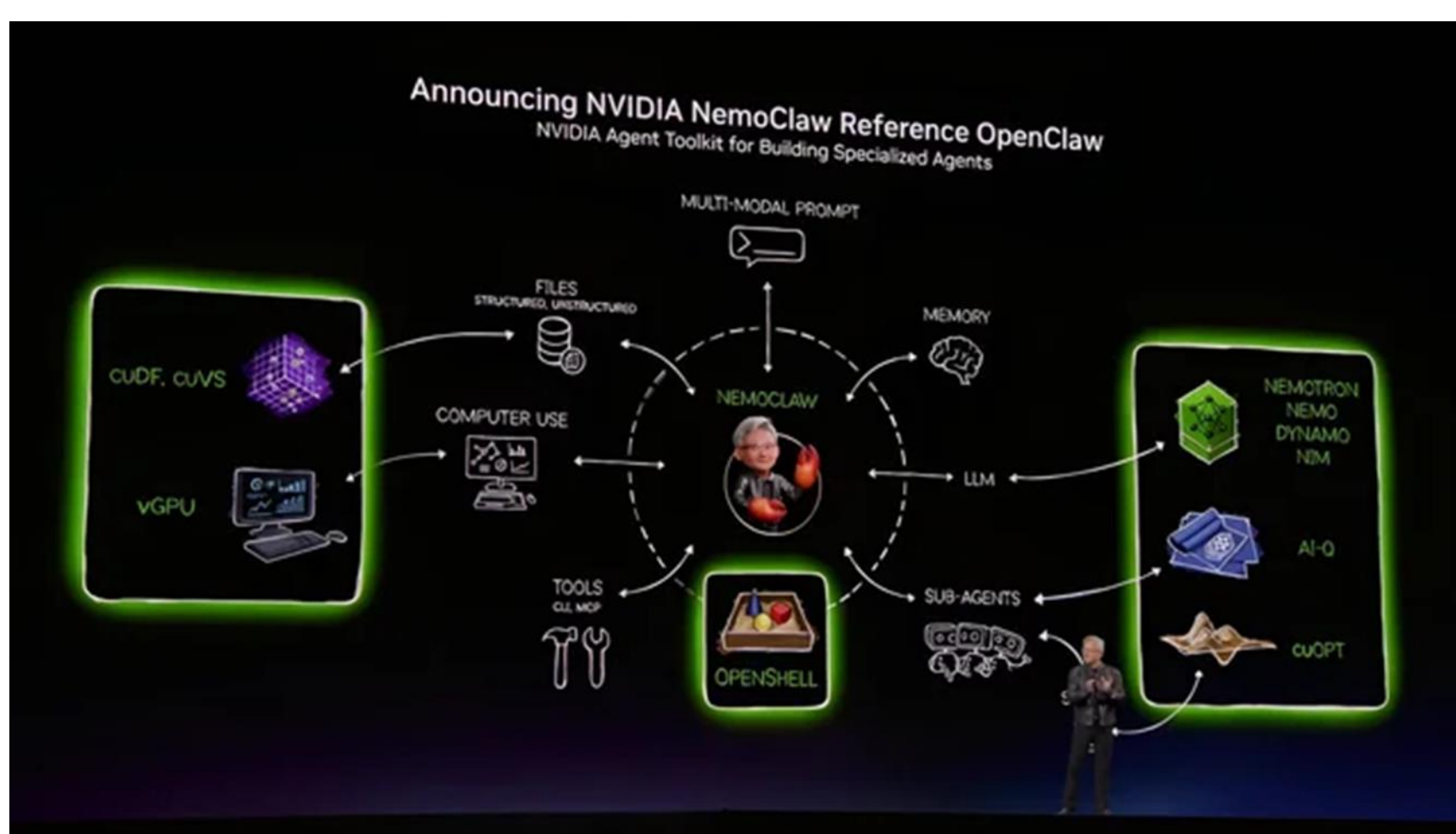
But portability [cuts both ways](#): the platform that builds the deepest integration layer across commerce, calendar, and personal preferences will be hardest to leave regardless of whether the [memory itself can travel](#).

## The Agentic Acceleration

Vibe coding tools like [Lovable, Cursor, and Replit](#) proved consumers would trust AI to *build* things. Now, horizontal agents, products that execute multi-step tasks end-to-end, are arriving at consumer scale. [OpenClaw](#) (originally Moltbot) became the [fastest-growing open-source project in GitHub history](#), surpassing React and Linux.

Platform ecosystems are racing to own the agentic surface – the point where [AI stops advising and starts acting](#).

At GTC this week, NVIDIA announced [NemoClaw](#), an enterprise-grade stack built on OpenClaw, adding the security and governance layer that production deployment demands to make Open Claw [the operating system for personal AI](#).



These innovations will smooth the path to both mass consumer adoption and [corporate utilization](#) in an agentic AI market set to grow to [\\$28 billion by 2027](#).

This week, Meta launched [Manus Desktop with local device access](#), putting agents directly on consumers' machines, after they [acquired Manus for over \\$2 billion](#) in December. Meta also acquired the [agent-only social network](#) Moltbook.

For advertisers, this is not a future consideration. When an agent books a flight, orders groceries, or selects a vendor on a consumer's behalf, the brand structurally embedded in the agent's decision logic wins the transaction.

The brand that is absent is not even considered. Eligibility is no longer about being found by a human, it is about being selected by an agent executing a task. This is a similar challenge as we have seen in GEO, where recommendation equity needs to be constructed above mere ranking. In this environment there are a huge number of agents each with their own requirements vs a small number of Generative search engine bots.

Brands in high-frequency transaction categories should be mapping plans for presence in [NemoClaw's skill library](#), Manus's [integration layer](#), and [ChatGPT](#) and [Claude connector](#) directories as a matter of urgency. The window between early mover and table stakes is measured in months, not years.

## What This Demands of Advertisers

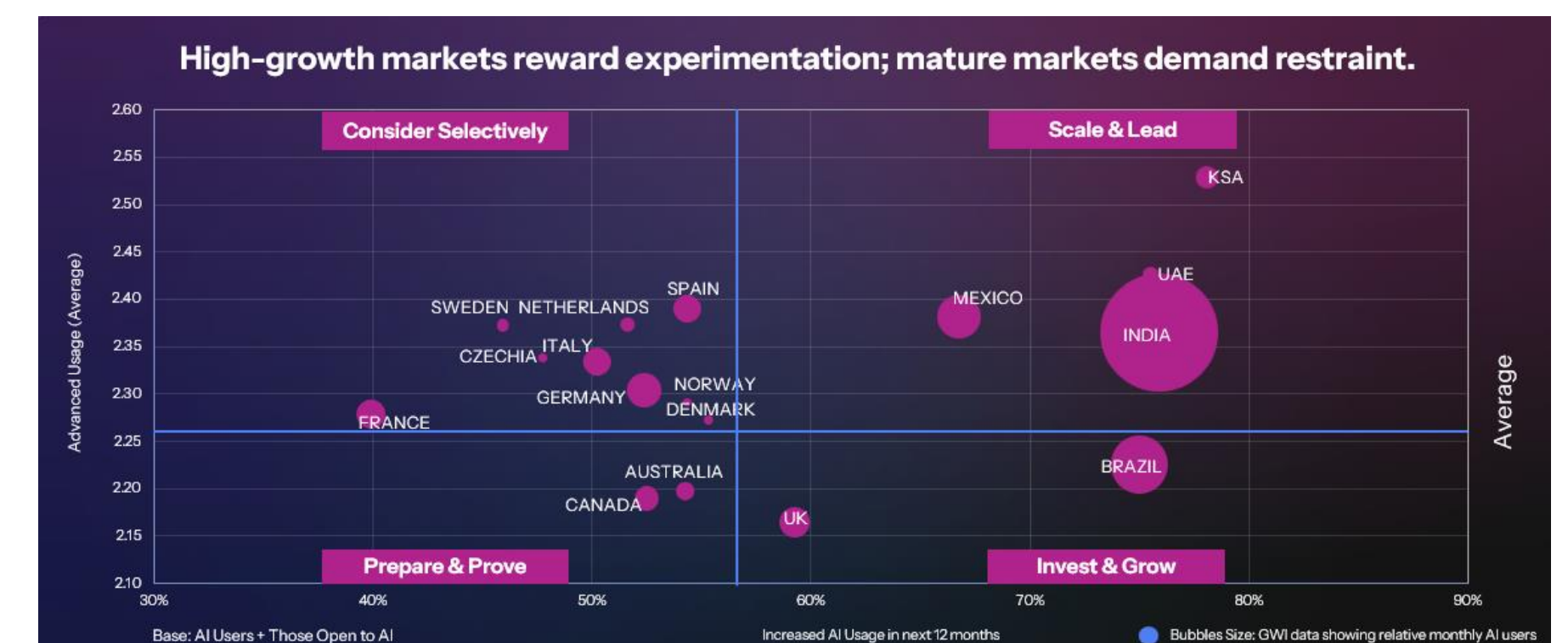
The fact that [28.3% of ChatGPT's most-cited pages have zero organic Google visibility](#) proves that traditional SEO is necessary, but not sufficient, for AI discoverability.

Structured data, schema markup, and authoritative content must be surfaced across ChatGPT, Gemini, Claude, and Perplexity, each with different citation mechanics and recommendation logic.

Brands must move from being searchable to being *recommended* across conversational environments.

If ChatGPT's app ecosystem is the new distribution surface, brands with transactional utility travel, retail, food delivery, financial services need to evaluate direct integration via ChatGPT's app directory and MCP protocols.

The [44% of early ChatGPT ad inventory going to retail brands](#) illustrates where the commercial gravity is forming. Being listed in the connector ecosystem is the conversational equivalent of shelf space.



OM's survey reports that [KSA, UAE, India and Mexico](#) are where AI adoption is deepest and fastest growing, these are the markets where conversational AI advertising will mature fastest. Brands running AI-channel pilots exclusively in the US are testing in a market that [ranks lower in adoption intensity](#). The learning curve is steeper and the opportunity is richer in markets where AI is already the default discovery interface.

Measurement infrastructure will need to [evolve with the interfaces](#) we will increasingly serve. OpenAI currently charges on a [cost-per-view model with only aggregated reporting](#) views and clicks, no conversation-level attribution. We can expect to see an AI-optimized CAPI emerge very soon.

The multi-tenanting consumer does not fit neatly into a platform-by-platform attribution model. If the click was already dying in traditional search, the conversational turn is its replacement, but we do not yet know how to value it.

The brands that figure this out first will not just win in AI, they will define how the next era of media is measured.



**Jean-Paul Edwards**

Managing Director, Product  
OMD Worldwide