OpenAI’s Ad Business Is on Pace to Miss Its Own Forecast By 90%, Analyst Says

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OpenAI’s ad business is on pace to fall short of the company’s own five-year revenue forecast by 90%, according to Emarketer.

The AI lab has projected $2.5 billion in ad revenue this year and $100 billion by 2030. Emarketer’s data finds that standalone chatbots like ChatGPT, Microsoft Copilot app, Google AI Mode, and Amazon Alexa for Shopping (formerly Rufus), will generate less than $1 billion in ad revenue this year, and just $5.41 billion by 2030.

OpenAI began its ad trial in February. Two months in, the AI lab made headlines touting those same projections.

The forecast assumes OpenAI captures search ad budgets en masse from traditional search ad sellers, dominates a fully mature chatbot ad market, and outperforms every ad format in history—all at once.

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