

从数据视角看

全球生成式AI的趋势和发展

#公众号：非凡产研

2024.04.10

数据来源：

本报告、文章或表格中有关AI产品流量数据均来自Similarweb并经非凡产研团队标注、分类和整理所得，难免存在错误和遗漏，数据仅供参考，不构成任何投资建议或咨询建议；
本数据仅涵盖使用PC和移动设备通过浏览器访问AI产品网页的行为，并不包括通过如下方式访问AI产品的行为：浏览器插件、独立app、Discord等第三方应用、小程序、开源代码本地运行等；
本数据的统计范围为月访问量超1万的AI产品，有关全球TOP50、国内TOP50和出海TOP50的分析，其统计范围指的是按访问量进行排序的全球前50、国内前50和出海前50个AI产品。

内容参考：

红杉资本 AI Ascent 会议-<https://www.sequoiacap.com/a16z>
a16z 官网文章-<https://a16z.com/>



Where Are We NOW?



A work in progress



The donut chart illustrates the market share of various AI tools in 2023. The segments are numbered 1 through 14, corresponding to the categories listed on the right. The categories and their market shares are as follows:

- Search:** 4% (perplexity, YOU)
- Content Generation:** 28% (Craiyon, ElevenLabs, Gamma, Ideogram, Invideo AI, Leonardo AI, NightCafe, NovelAI, Midjourney, PIXAI, PIXLR, runway, Speechify, Suno)
- Content Editing:** 22% (Clipchamp, cutout.pro, PIXELCUT, Photomyne, PhotoRoom, Playground, OpusClip, QuillBot, Vectorizer AI, VEED.IO, VocalRemover)
- Model Hub:** 6% (Civitai, Hugging Face, Replicate)
- General Assistant:** 10% (ChatGPT, Claude, DeepAI, Gemini, Poe)
- Productivity:** 14% (Blackbox AI, ChatPDF, Eightify, liner, MaxAI.me, phind, Otter.ai)
- Companion:** 16% (candy.ai, character.ai, Chubai, Crushon AI, DREAMGF, JanitorAI, SpleyChat, yodayo)

The segments of the donut chart are numbered 1 through 14, corresponding to the categories listed on the right. The segments are color-coded: 1 (dark purple), 2 (purple), 3 (red), 4 (orange), 5 (red), 6 (pink), 7 (pink), 8 (pink), 9 (pink), 10 (pink), 11 (pink), 12 (pink), 13 (pink), and 14 (pink).

The donut chart illustrates the distribution of AI services across seven categories. The segments are numbered 1 through 13, corresponding to the order of the categories in the surrounding boxes. The categories and their percentages are:

- Browser** (2%)
- Content Editing** (26%)
- General Assistant** (26%)
- Companion** (4%)
- Messaging** (6%)
- Edtech** (14%)
- Content Generation** (22%)

The segments are numbered 1 through 13, corresponding to the order of the categories in the surrounding boxes. The categories and their percentages are:

- Browser** (2%)
- Content Editing** (26%)
- General Assistant** (26%)
- Companion** (4%)
- Messaging** (6%)
- Edtech** (14%)
- Content Generation** (22%)

The Top 50 Gen AI Web Products, by Unique Monthly Visits

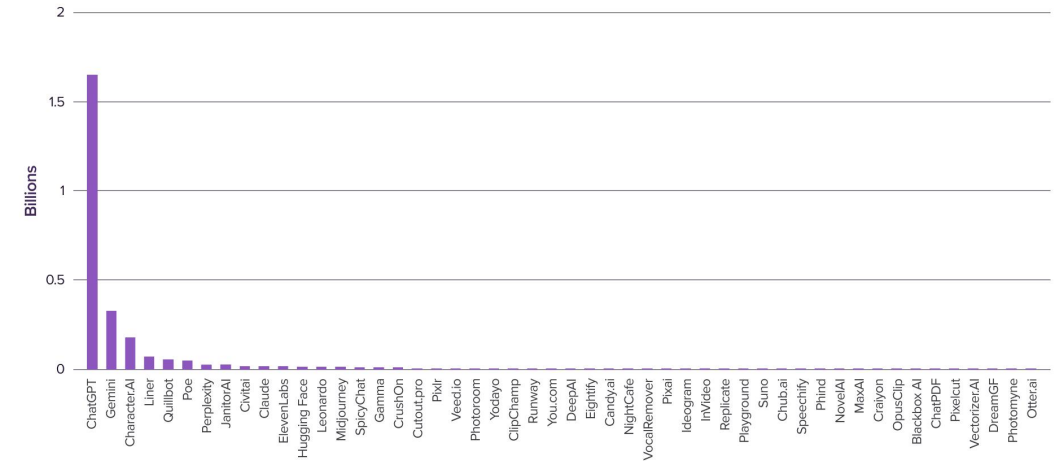
1. ChatGPT	11. IIElevenLabs	21. PhotoRoom	31. PIXAI	41. MaxAI.me
2. Gemini	12. Hugging Face	22. LUDATOYO	32. ideogram	42. Craiyon
3. character.ai	13. Leonardo AI	23. Clipchamp	33. invideo AI	43. OpusClip
4. liner	14. Midjourney	24. runway	34. feplicate	44. BLACKBOX AI
5. QuillBot	15. SpicyChat	25. YOU	35. Playground	45. CHATPDF
6. Poe	16. Gamma	26. DeepAI	36. Suno	46. PIXELCUT
7. perplexity	17. Crushon AI	27. Eightify	37. Chub.ai	47. Vectorizer.AI
8. JanitorAI	18. cutout.pro	28. candy.ai	38. Speechify	48. DREAMGF
9. CIVITAI	19. PIXLR	29. NightCafe	39. phind	49. Photomyne
10. Claude	20. VEED.IO	30. VocalRemover	40. NovelAI	50. Otter.ai

*Formerly Bard

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Top Gen AI Consumer Web Products: Unique Monthly Visits



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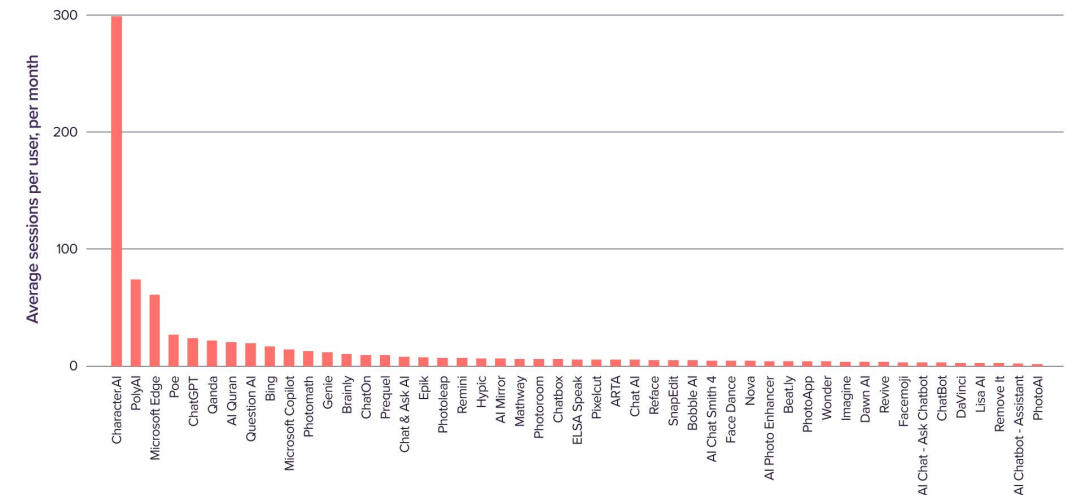
The Top 50 Gen AI Mobile Apps, by Monthly Active Users

1. ChatGPT	11. Photoroom	21. Beat.ly	31. Bobbie AI	41. Chat AI
2. Microsoft Edge	12. Remove It	22. Photo AI	32. reface	42. ELSA
3. photomath	13. Evoke AI	23. Hypic	33. PhotoApp	43. AI ARTA
4. Bing	14. AI Chatbot: AI Chat Smith 4	24. AI Quran	34. Prequel	44. AI Chat
5. Remini	15. ChatBot	25. ArtMind	35. Mathway	45. Revive
6. BRAINLY	16. character.ai	26. SnapEdit	36. Poly.AI	46. LISA AI
7. NOVA	17. AI Mirror	27. Imagine	37. Genie	47. PIXELCUT
8. Chat & Ask AI	18. ChatOn	28. Question AI	38. Photoleap	48. AI Chat - Assistant
9. Facemoji	19. QANDA	29. ChatBox	39. Wonder	49. Poe
10. EPIK	20. Face Dance	30. DAVINCI	40. Copilot	50. dawn ai

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Top Gen AI Consumer Mobile Apps: Engagement



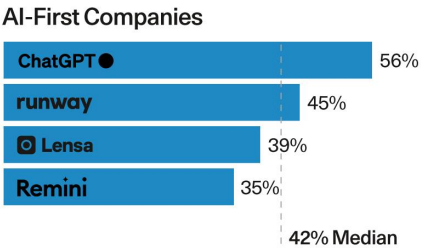
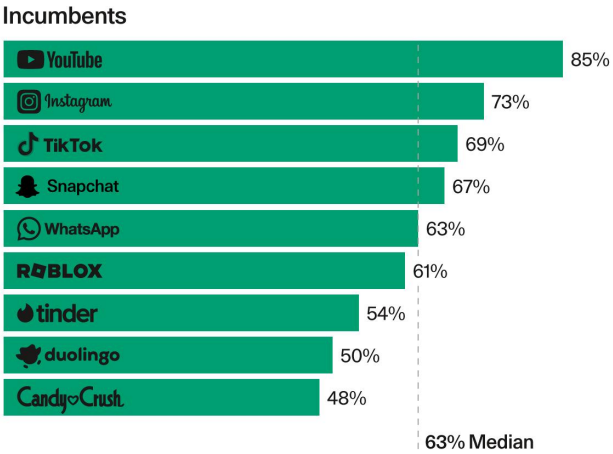
Charts are for informational purposes only and should not be used for investment decisions. Past performance is not indicative of future results. None of the above should be taken as investment advice; see a16z.com/disclosures.



Time For Service to Reach 1M Users

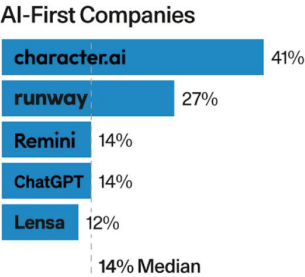
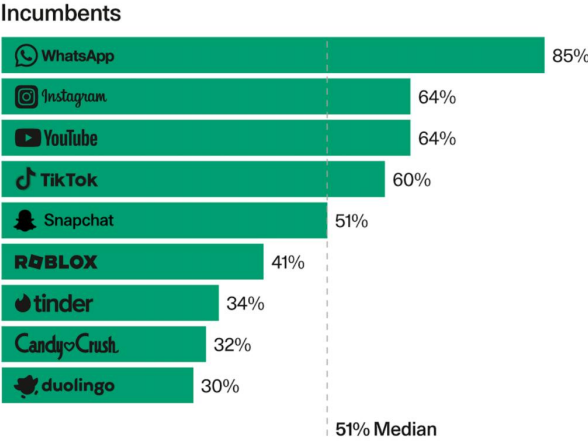


One Month Retention



Data from mobile apps only.
Averaged over the past 12 months of cohorts in the US.

DAU/MAU



Data from mobile apps only.

Rank	Platform	Launch	Time to 100M Users
1	Threads	2023	5 days
2	ChatGPT	2022	2 months
3	TikTok	2017	9 months
4	WeChat	2011	1 year, 2 months
5	Instagram	2010	2 years, 6 months
6	Myspace	2003	3 years
7	WhatsApp	2009	3 years, 6 months
8	Snapchat	2011	3 years, 8 months
9	YouTube	2005	4 years, 1 month
10	Facebook	2004	4 years, 6 months
11	Spotify	2006	4 years, 7 months
12	Telegram	2013	5 years, 1 month
13	Twitter	2006	5 years, 5 months
14	Uber	2011	5 years, 10 months
15	Pinterest	2010	5 years, 11 months
16	Google Translate	2006	6 years, 6 months
17	World Wide Web	1991	7 years
18	LinkedIn	2003	7 years, 11 months

全球AI产品总数

1,833

↑

国内AI产品数量

151

↑

出海AI产品数量

58

↑

全球AI产品访问量

77.15

亿次

全球AI产品访问时长

95,794

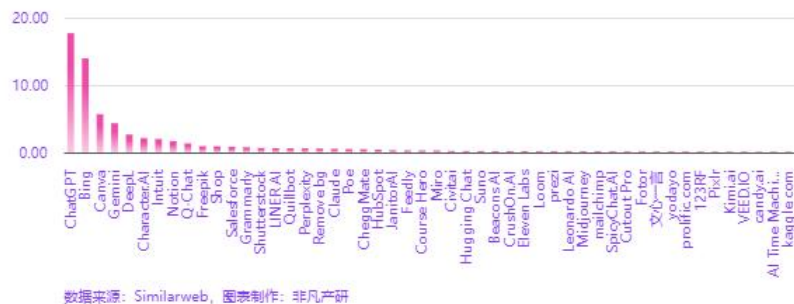
万小时

ChatGPT独立访客

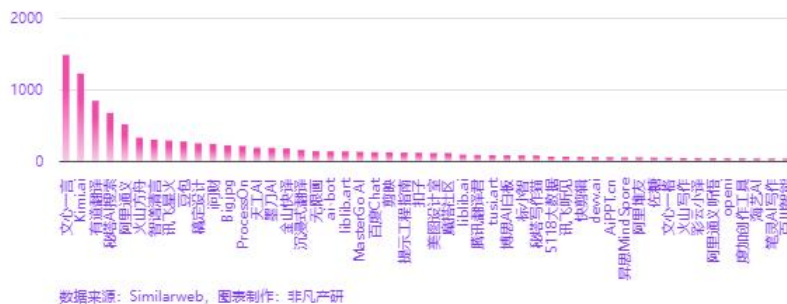
2.08

亿人

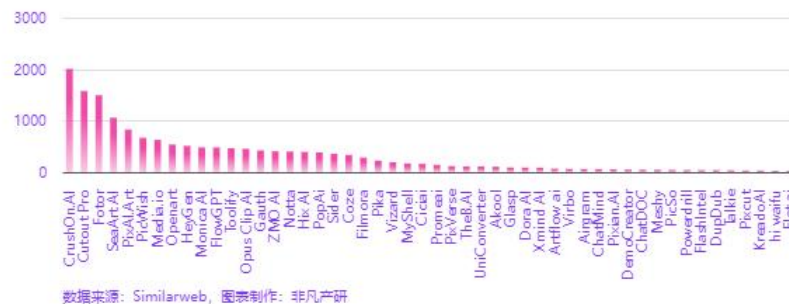
全球AI产品TOP50访问量 (单位: 亿次)



国内AI产品TOP50访问量 (单位: 万次)



出海AI产品TOP50访问量 (单位: 万次)



字节跳动AI产品线



百度AI产品线



腾讯AI产品线



阿里巴巴AI产品线



科大讯飞AI产品线



万兴科技AI产品线



数据说明

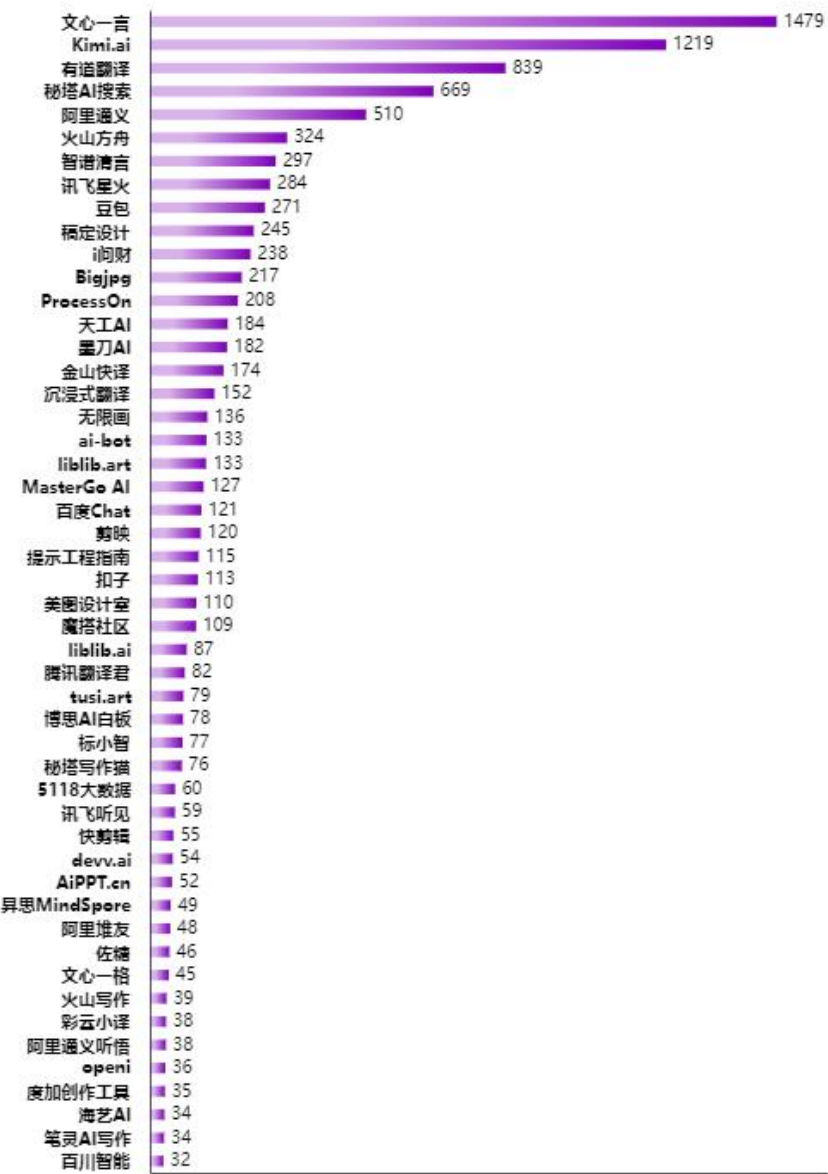
本报告、文章或表格中有关AI产品流量数据均来自Similarweb并经非凡产研团队标注、分类和整理所得，难免存在错误和遗漏，数据仅供参考，不构成任何投资建议或咨询建议；

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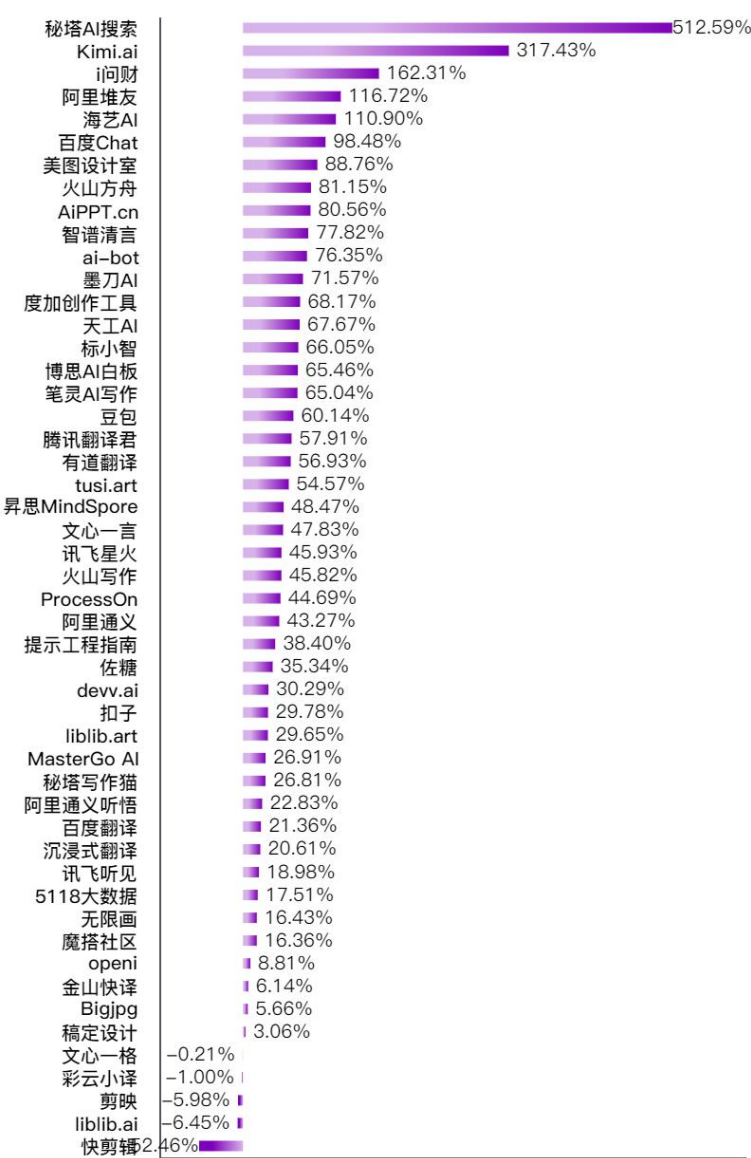
本数据的统计范围为月访问量超1万的AI产品，有关全球TOP50、国内TOP50和出海TOP40的分析，其统计范围指的是按访问量进行排序的全球前50、国内前50和出海前40个AI产品；

欢迎引用数据，请留意标注：【数据来源：Similarweb，图表制作：非凡产研】或【数据来源：Similarweb，分析整理：非凡产研】。

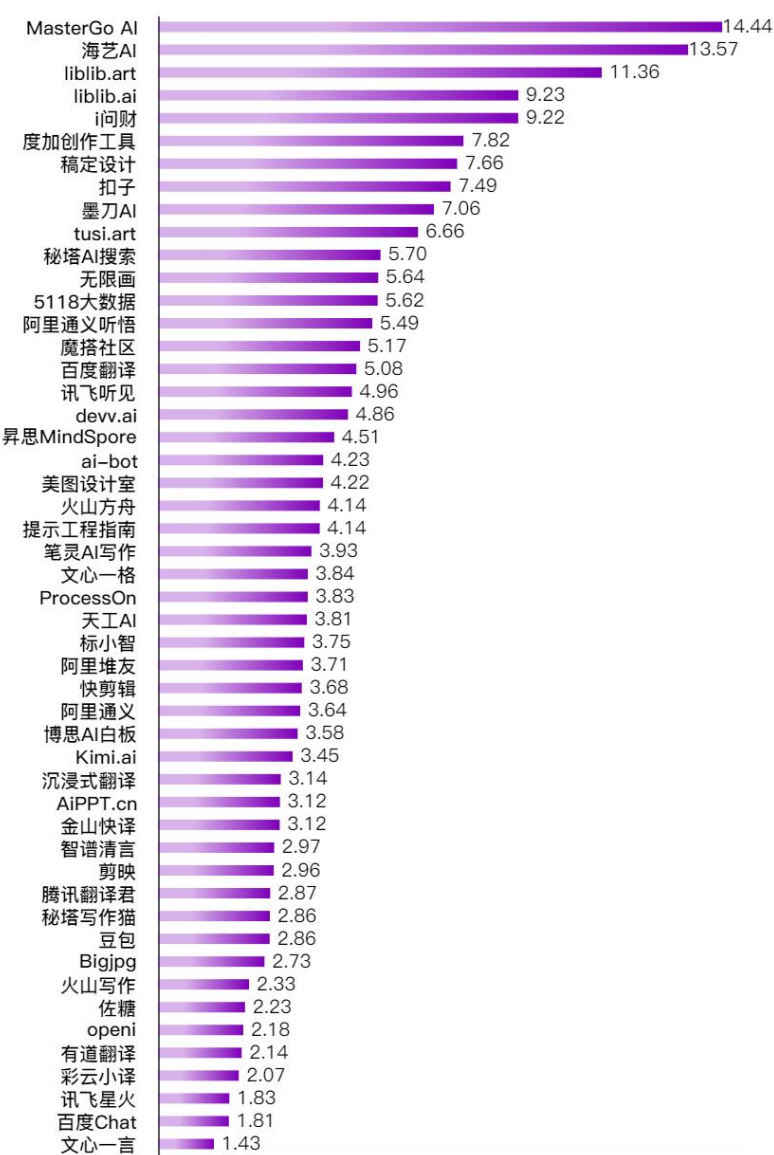
2024年3月国内AI产品TOP50访问量（单位：万次）



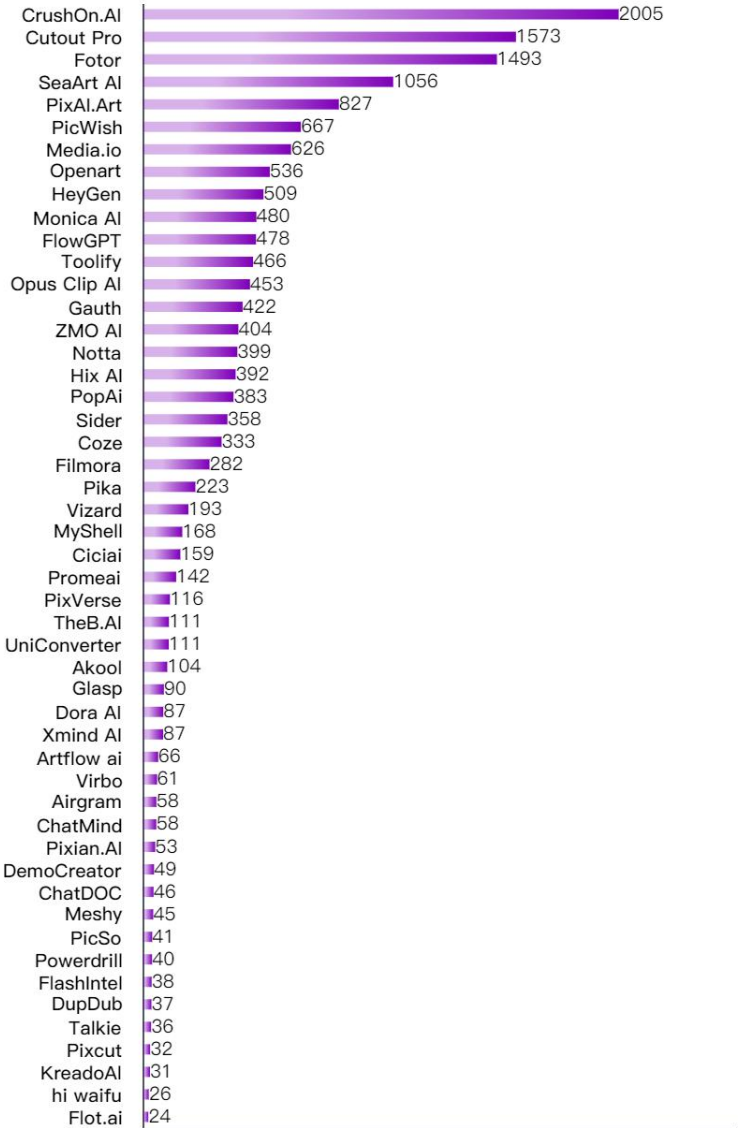
2024年3月国内AI产品TOP50访问量环比变化



2024年3月国内AI产品TOP50单次访问时长（单位:分钟）

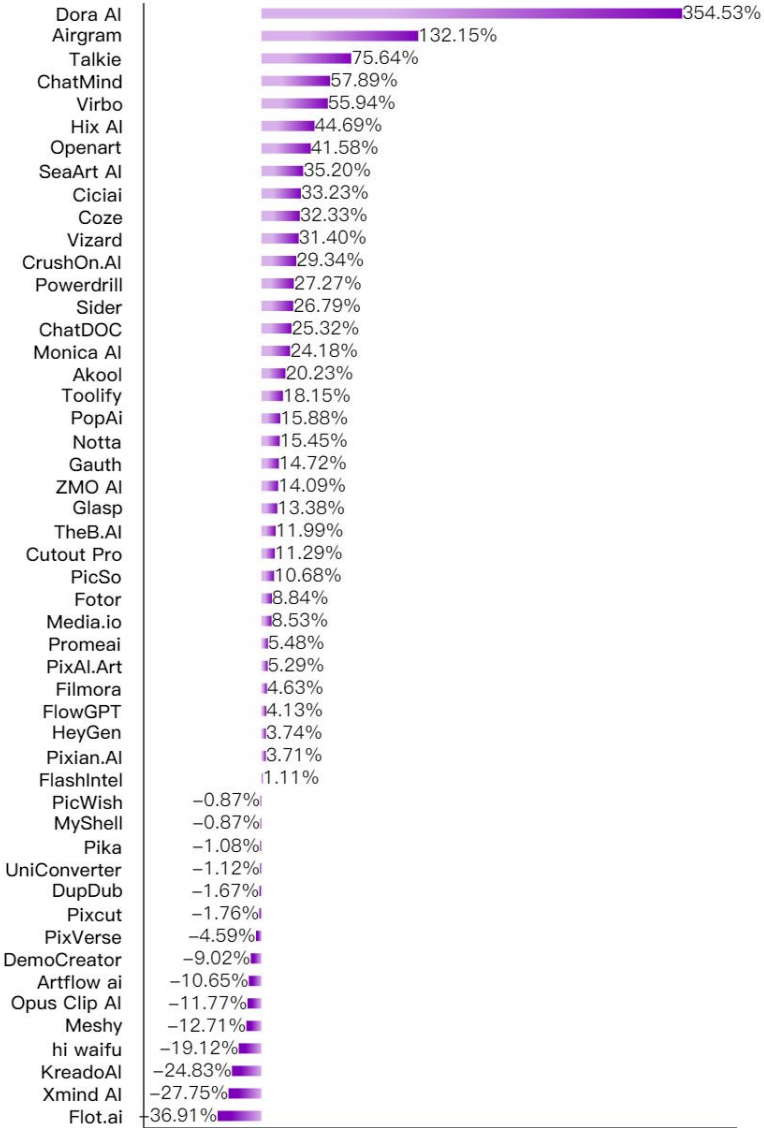


2024年3月出海AI产品TOP50访问量（单位：万次）



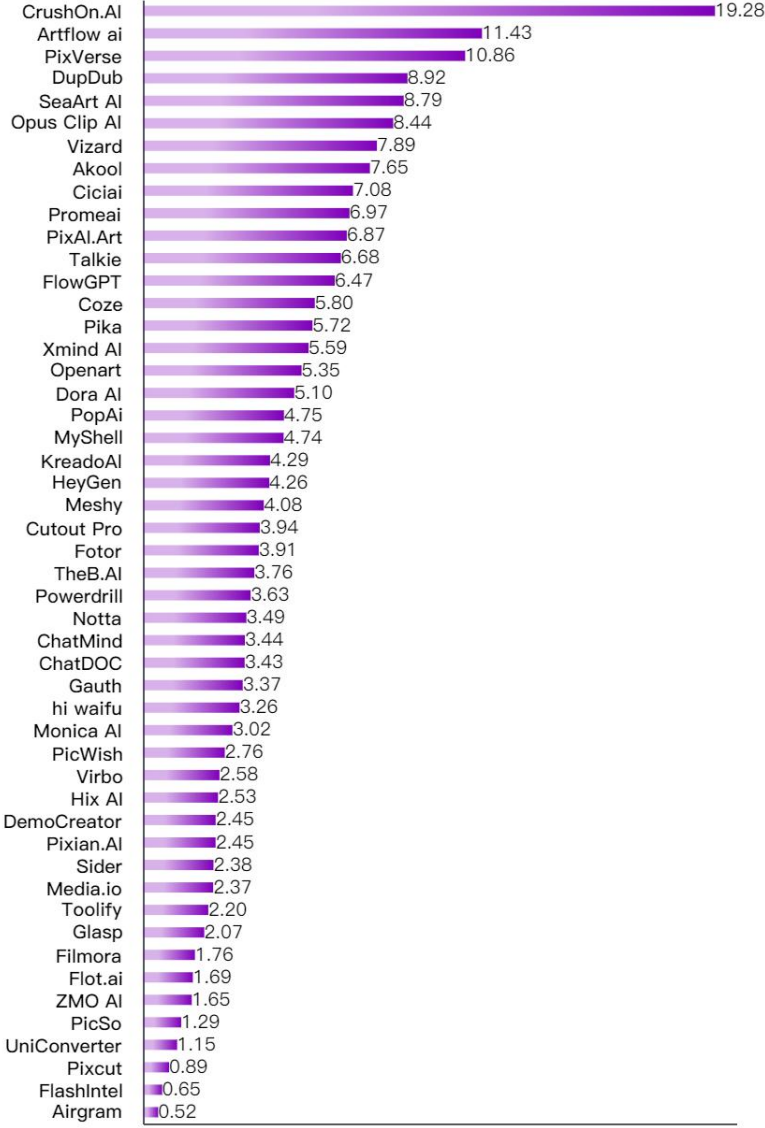
数据来源: Similarweb 图表制作: 非凡产研

2024年3月出海AI产品TOP50访问量环比变化



数据来源: Similarweb 图表制作: 非凡产研

2024年3月出海AI产品TOP50单次访问时长（单位:分钟）



数据来源: Similarweb 图表制作: 非凡产研

全球 | 累计融资事件

919

条融资记录

全球 | 累计融资金额

3,137

亿人民币

海外 | 累计融资事件

466

条融资记录

海外 | 累计融资金额

2,638

亿人民币

国内 | 累计融资事件

453

条融资记录

国内 | 累计融资金额

499

亿人民币

海外 | 知名机构



海外 | 知名项目



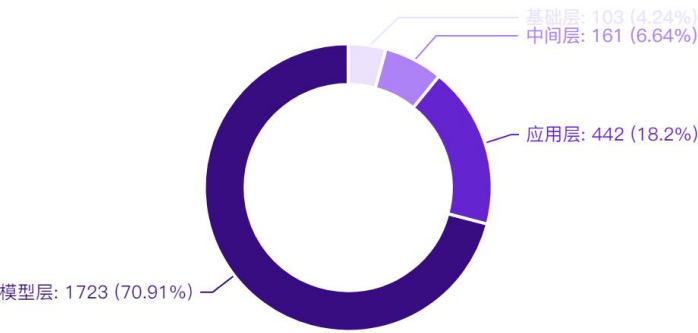
国内 | 知名机构



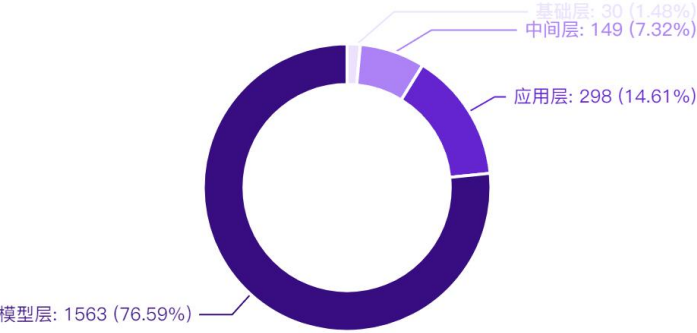
国内 | 知名项目



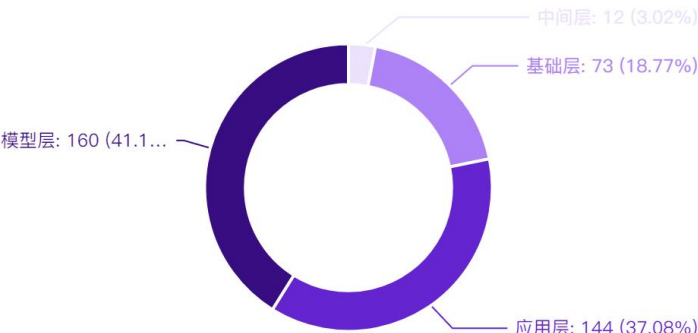
全球 | 投资分布 (单位: 亿人民币)



海外 | 投资分布 (单位: 亿人民币)



国内 | 投资分布 (单位: 亿人民币)



What is it?

1: Create...



2: Reason...

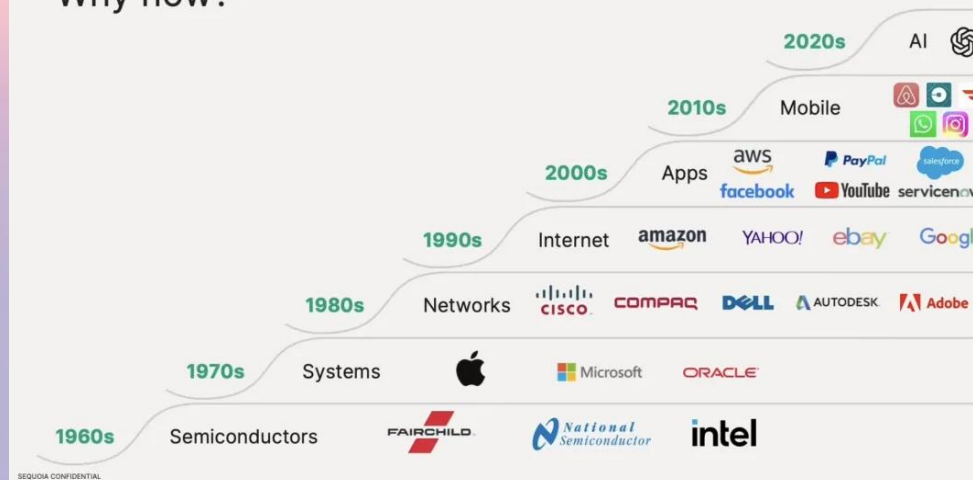


3: Interact...



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Why now?



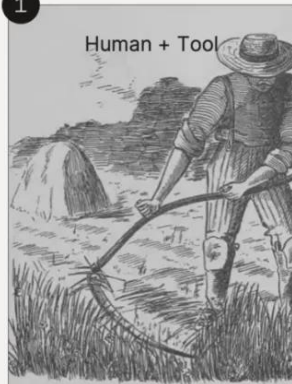
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So, Why NOW

Patterns in Revolution

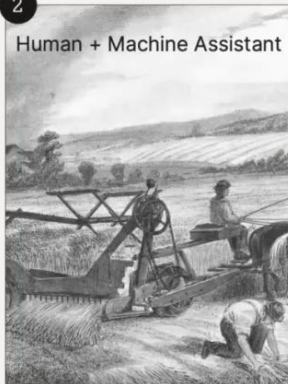
1

Human + Tool



2

Human + Machine Assistant



3



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Accelerating Change

~\$3B
REVENUE



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We're at the beginning of the third epoch of compute

Microchips Brought the Marginal
Cost of Compute to Zero
(relative to a human)



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24

alóZ

The Internet Brought the Marginal
Cost of Distribution to Zero
(relative to a human)



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25

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Large models bring
the marginal cost of
creation to 0

???

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26 alóZ

Success takes time

2007



2008

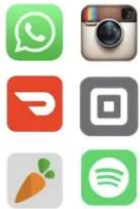
SHORT-TERM



>200K apps

2010+

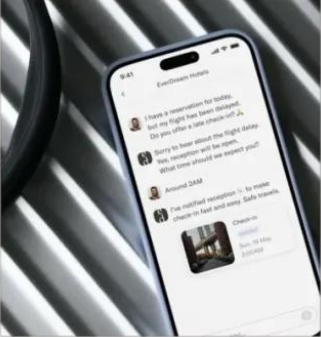
LONGER-TERM



→ Legendary mobile companies

Glimpses of enduring value

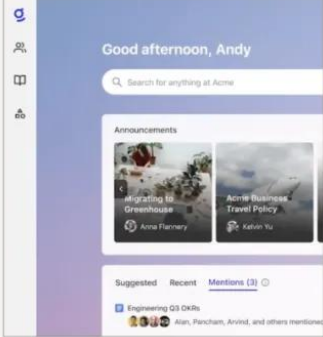
AI customer support



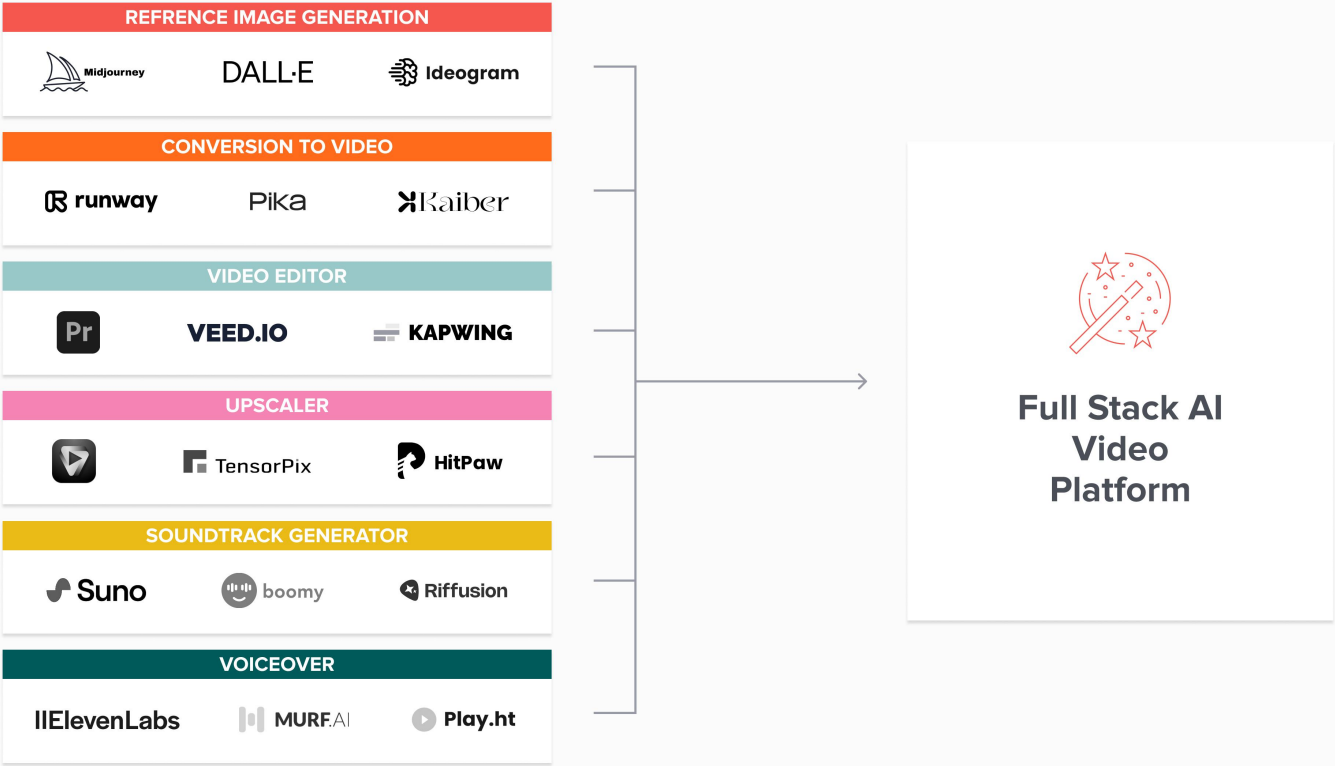
AI friendship



AI enterprise knowledge

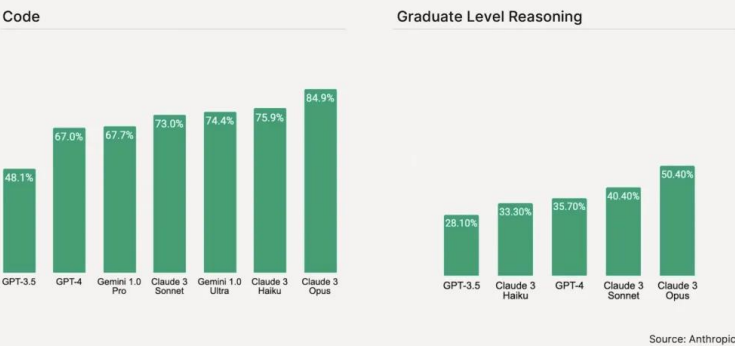


Taking AI Tools From Standalone to Full Stack

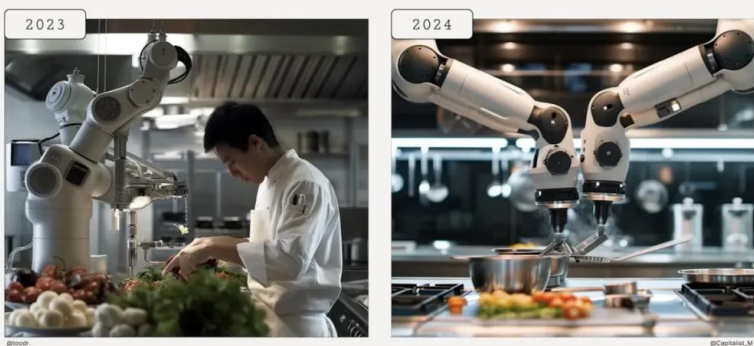


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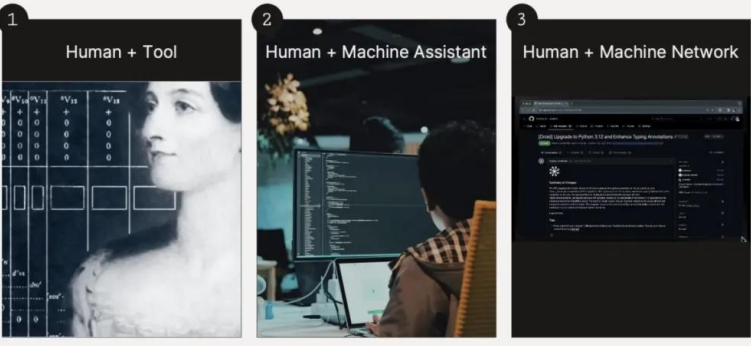
Accelerating base model IQ



What's Coming in 2024: From Copilots to Agents

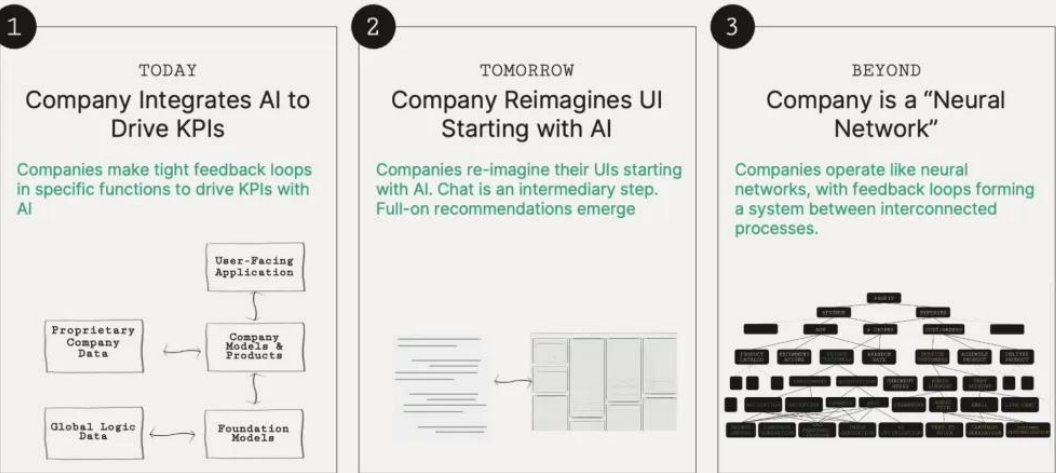


Patterns in Revolution: AI in Software



In The Future, Everything is Generated

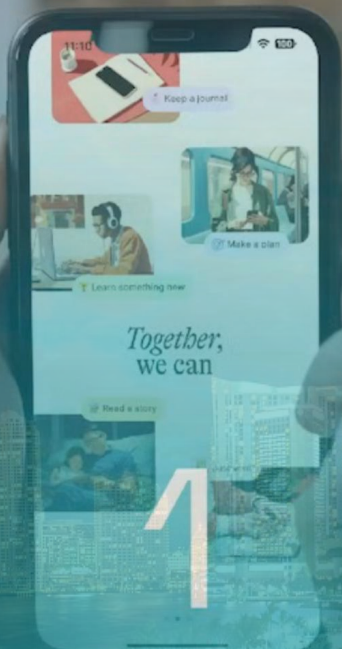
How: AI Infused Companies



White space

	CLOUD	MOBILE	AI
APPS	salesforce, servicenow, workday, shopify, zoom, DocuSign, Dropbox, Veeva, RingCentral, Palantir, HubSpot, paycom, zoominfo, payrollcity, UiPath, box, theTradeDesk, bill	Meta, Uber, Spotify, Delivery Hero, airbnb, DOORDASH, SnapChat, Lyft, Pinterest, Playtika, deliveroo, Robinhood, yelp, TikTok	ChatGPT
DEVELOPER	twilio, ATlassian	Unity, DATADOG	
DATA	splunk, snowflake, mongoDB, dynatrace, elastic		
SECURITY	paloalto, CROWDSTRIKE, okta, zscaler, CLOUDFLARE		
INFRA	aws, Azure, Google Cloud Platform	Apple	aws, nvidia, Azure, Google Cloud Platform

It's Time To Build



Companionship



Creativity

To Superhuman Team

Congratulations Team! 🎉

Dear team,

Congratulations to our recent promotions! Jason, Noel, and Miles have joined the company, and it's time to celebrate their achievements.

Jason has been an essential member of the Engineering team, leading with other departments to solve challenging customer problems. He's helped many engineers and non-engineers, and his positive attitude and grit are in

Shorten

Lengthen

Simplify

Rewrite in my voice

Improve writing

Write a draft

Send

the Analytics team
defined processes
Congratulations N

tal skills as the
helping hundre
ive the team, C

3

Productivity

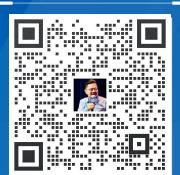
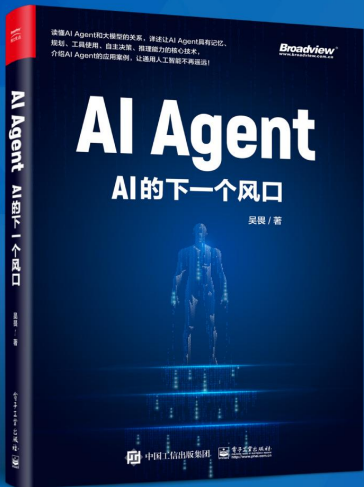


Robotics

揭开未来与我们工作和生活息息相关的
AI智能体的神秘面纱

周鸿祎 × 朱啸虎 × 方汉 × 张家兴

联袂推荐



京东内购到手价
~~69元~~
34.5元

没有晦涩难懂的专业术语
零基础也能读懂AI智能体

AI Agent和大语言模型有什么关系？

单智能体和多智能体系统有什么差异？

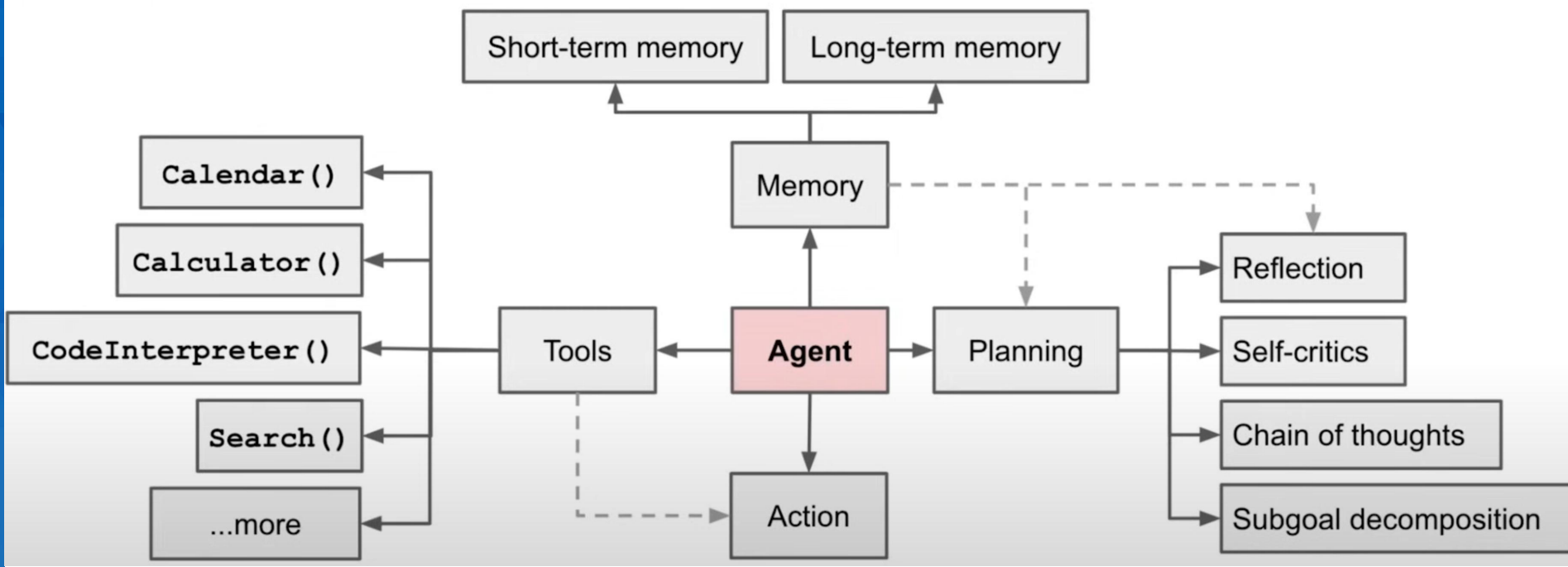
AI Agent的核心技术有哪些？

生成式AI Agent和自主式AI Agent分别有哪些应用？

什么是具身智能？具身机器人又有哪些应用？

.....

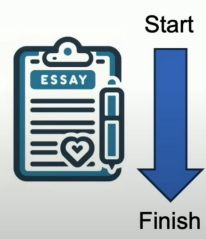
上面这些问题在本书中
都可以找到答案



LLM-based agents

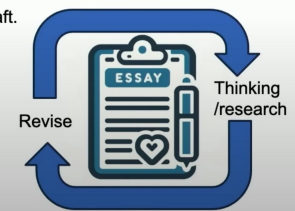
Non-agentic workflow (zero-shot):

Please type out an essay on topic X from start to finish in one go, without using backspace.



Agentic workflow:

Write an essay outline on topic X
Do you need any web research?
Write a first draft.
Consider what parts need revision or more research.
Revise your draft.
....



Agentic Reasoning Design Patterns

1. Reflection

- Self-Refine: Iterative Refinement with Self-Feedback, Madaan et al. (2023)
- Reflexion: Language Agents with Verbal Reinforcement Learning, Shinn et al., (2023)

2. Tool use

- Gorilla: Large Language Model Connected with Massive APIs, Patil et al. (2023)
- MM-REACT: Prompting ChatGPT for Multimodal Reasoning and Action, Yang et al. (2023)

3. Planning

- Chain-of-Thought Prompting Elicits Reasoning in Large Language Models, Wei et al., (2022)
- HuggingGPT: Solving AI Tasks with ChatGPT and its Friends in Hugging Face, Shen et al. (2023)

4. Multi-agent collaboration

- Communicative Agents for Software Development, Qian et al., (2023)
- AutoGen: Enabling Next-Gen LLM Applications via Multi-Agent Conversation, Wu et al. (2023)