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What to expect from AI in 2026

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Audio Starts

Zachary:

How does the AI industry look a year from now, in 2026 versus 2025? I think we're mostly continuing along the same trend that we're on. And I think what that means is that there's around 800 or 900 million weekly active users for OpenAI today. The big, really penetrated global internet platforms have between 2 and 3 billion active users. And so there's a lot of people today that just aren't using these tools every day. And they're not using them as much as they could be. So I think the number one base step is higher engagement, higher usage, more transactions we can call per day. And I think what we're going to see in 2026 is a continuation of higher engagement trends and then new monetization models. And so really all we've seen so far is the subscription model. It is what's generating most of the revenues on the consumer side. And then on the enterprise side is API, which is a consumption-based model. I'll leave the enterprise side alone for now, because I think it's a separate conversation. But on the consumer side, I think there is quite a bit of expectation, both in China with the internet platforms there and in the US with the model distributors here, that they're going to start to monetize, probably through advertising and maybe through other types of transactions, e-commerce, travel, all of these. And I think that's something that we've been working and building, too. I think the models themselves have become incredibly sophisticated. We're using them all the time in our daily life. But it is something where the expectation and the focus, especially from the companies, is starting to shift to, OK, how do we start to make some money from all of this engagement and all of this usage?

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