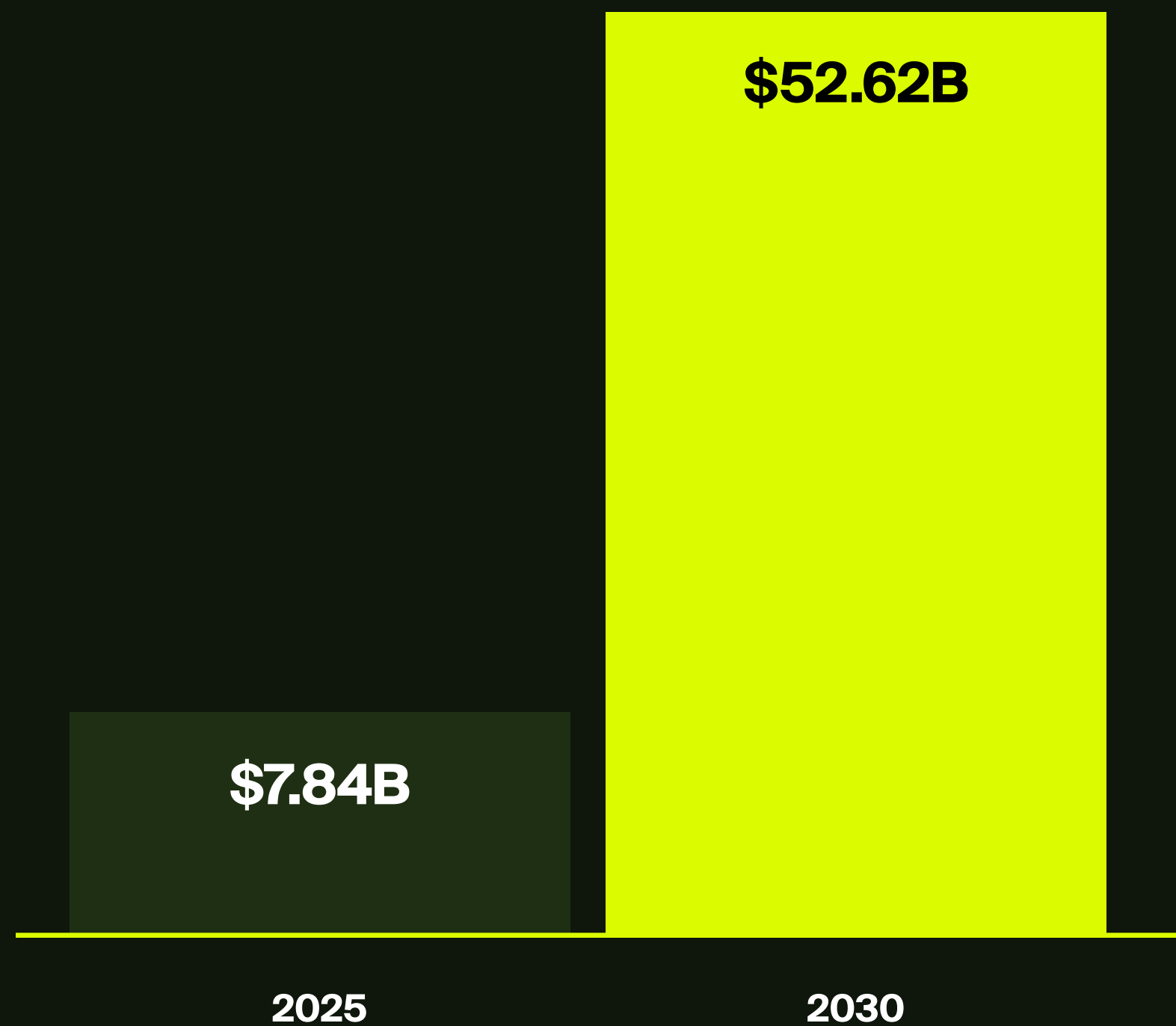


# Agentic AI is rapidly moving from experiment to infrastructure

Global Agentic AI Market Size (USD)



**~7X**

GROWTH IN GLOBAL AGENTIC AI MARKET BY 2030

The market for agentic AI, including platforms, infrastructure, and services that power autonomous AI agents across industries, is projected to grow significantly over the next five years.

**\$8.17B**

AGENTIC AI IN MEDIA, ENTERTAINMENT, AND CONTENT CREATION

The market for autonomous agents across media, entertainment, and content creation is projected to grow at a 36% CAGR through 2030 (up from \$1.76B in 2025), with advertising and marketing holding the largest share.

**30-50%**

ACCELERATION IN BUSINESS PROCESS SPEED FROM AGENTIC AI

BCG finds that agentic AI can accelerate business processes by 30-50% and reduce time spent on low-value work by 25-40%, based on cross-industry analysis.

**\$190B-\$385B**

U.S. E-COMMERCE PROJECTED TO BE INFLUENCED BY AI AGENTS BY 2030

Morgan Stanley estimates agentic shoppers could represent \$190B to \$385B in U.S. e-commerce spending by 2030, capturing 10-20% of the total online retail market.



# AI is becoming a critical advertising medium and surface

AI is becoming a media channel in its own right as a surface through which advertisers can reach and influence consumers directly. Examples include ads served within ChatGPT and sponsored placements in AI-powered search results.

## Key highlights:

- OpenAI is projecting \$100B in global advertising revenue by 2030, up from \$2.5B in 2026. The ad pilot hit \$100M annualized revenue within six weeks of launch.
- U.S. AI search ad spend is forecast to reach \$25.9B by 2029, representing 13.6% of all U.S. search ad spending – up from just \$1B in 2025, with spend more than doubling year-over-year in 2026 alone.
- Around 25% of Google AI Overview SERPs now include ads, up from approximately 3% in January 2025 – roughly an 8x increase in under a year as Google accelerates monetization of its AI search experience.

**AXIOS**

## Scoop: OpenAI projects \$100 billion in ad revenue by 2030

“OpenAI expects to generate \$2.5 billion in ad revenue this year and \$100 billion by 2030, according to a source familiar with recent presentations to investors.

**Why it matters:** It's the clearest sign yet that OpenAI sees advertising as a core part of its future business.”



# Brands are moving fast on using AI agents for marketing, advertising, and media buying

60%

of brands will use agentic AI to deliver one-to-one marketing interactions by 2028 – what Gartner calls “the end of channel-based marketing as we know it.”

66%

of ad buyers are increasing focus on agentic AI for ad buying and campaign execution – with 96% already aware of it as a capability.

1700+

individuals across 100+ companies – brands, agencies, publishers, and more – have joined AgenticAdvertising.org since its October 2025 launch.



# Premium publishers are going live with **agentic ad sales** and planning capabilities



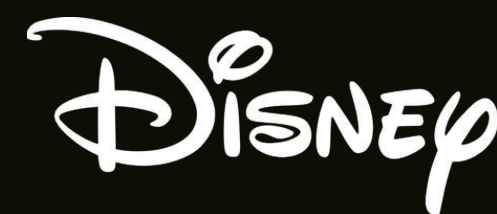
## AI Agents Are Taking Over NBCU's Linear TV Buys

"This marks a historic milestone – the very first time AI agents are automating live sports inventory on linear television."



## CNN Builds In-House Agent Infrastructure as it Prepares for AI-Driven Media Trading

"CNN's early move on agentic ad buying suggests publishers are trying to get ahead of a potential power shift in programmatic, where AI could control more of the transaction layer and pricing dynamics."



## Disney Going 'Vertical,' Unveils AI 'Ad Agent'

"Disney is also developing an agentic 'Ads Agent' to handle more complex planning. It takes creative briefs and generates full marketing plans, complete with core campaign objectives and target audience suggestions."



# The infrastructure for agentic advertising is live and the industry has rallied behind it

- **AgenticAdvertising.org (AAO)** is the industry's open standards body for agentic advertising, led by Randall Rothenberg (former CEO, IAB) and Matthew Egol (former Partner, Booz/PwC).
- **The Ad Context Protocol (AdCP)** is the open standard enabling AI agents to discover, negotiate, and transact media across any platform.
- **AdCP is already live and in production.** For publishers, this means buyer agents are actively looking for inventory to transact against — and publishers not yet on the protocol risk being passed over entirely.



Sample AAO Members

