Why One Player Will Mostly Take All in AI — and How the AI Browser Plays a Role

Winner takes most in AI, just like in Internet search. So, accelerate adoption and customer loyalty, now.

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Dave Rothschild Following

The race to capture the largest number of AI users may be the most important platform battle since Google search won.

The Search Playbook, Replayed

The AI race looks like a repeat of the Internet search winning playbook where there is effectively one provider that aggregates all the demand and therefore usage. **More users → more search queries → better click through data → better ranking algorithms → better results → more users.**

OpenAI and Perplexity just launched AI browsers. You can browse to any web page and then open an assistant window and ask questions about the website you are on or select suggested questions…**and that is key**.

Sam Altman, CEO of OpenAI, has said:

> *"You don't use a different search engine at work than you do at home."*

This is a winner takes mostly all view. But "all" are not using AI, yet.

By "mostly all" I mean the majority of market share and customer **attitudinal loyalty**, like Google has in search.

It is easy to use a different search engine but people don't. Why? Default bias, distribution control ($20B/year to Apple), feedback loops, ecosystem integration and a few other things.

So the AI browser is a chapter in the same playbook.

Differentiated niches will still exist. But economic, behavioral and attitudinal control will likely go to one company.

The same feedback loop that made Google unbeatable in search may soon define who dominates AI assistance.

The Problem: Adoption Takes Time

The problem and opportunity is that despite the press hype around AI, not everyone is using it. AI companies really want to drive more adoption but it is harder once you get past the power users.

New technology doesn't go from 0 to 90% market adoption overnight. It takes many, many years. New technology adoption follows a S-curve with innovators and early adopters eager to use it. That is the front part of the S-curve. Non-power users (the early and late majority, and laggards) wait.

For AI companies, the challenge isn't convincing power users . **It's converting the skeptical middle.** That's where most of the market is, and that's where the opportunity lies.

> *See a more detailed discussion of technology adoption (Diffusion of Innovations) in my other article here:*

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The Advantage: Context Lower Cognitive Load

The people on the more vertical part of the S-curve, the skeptical middle:

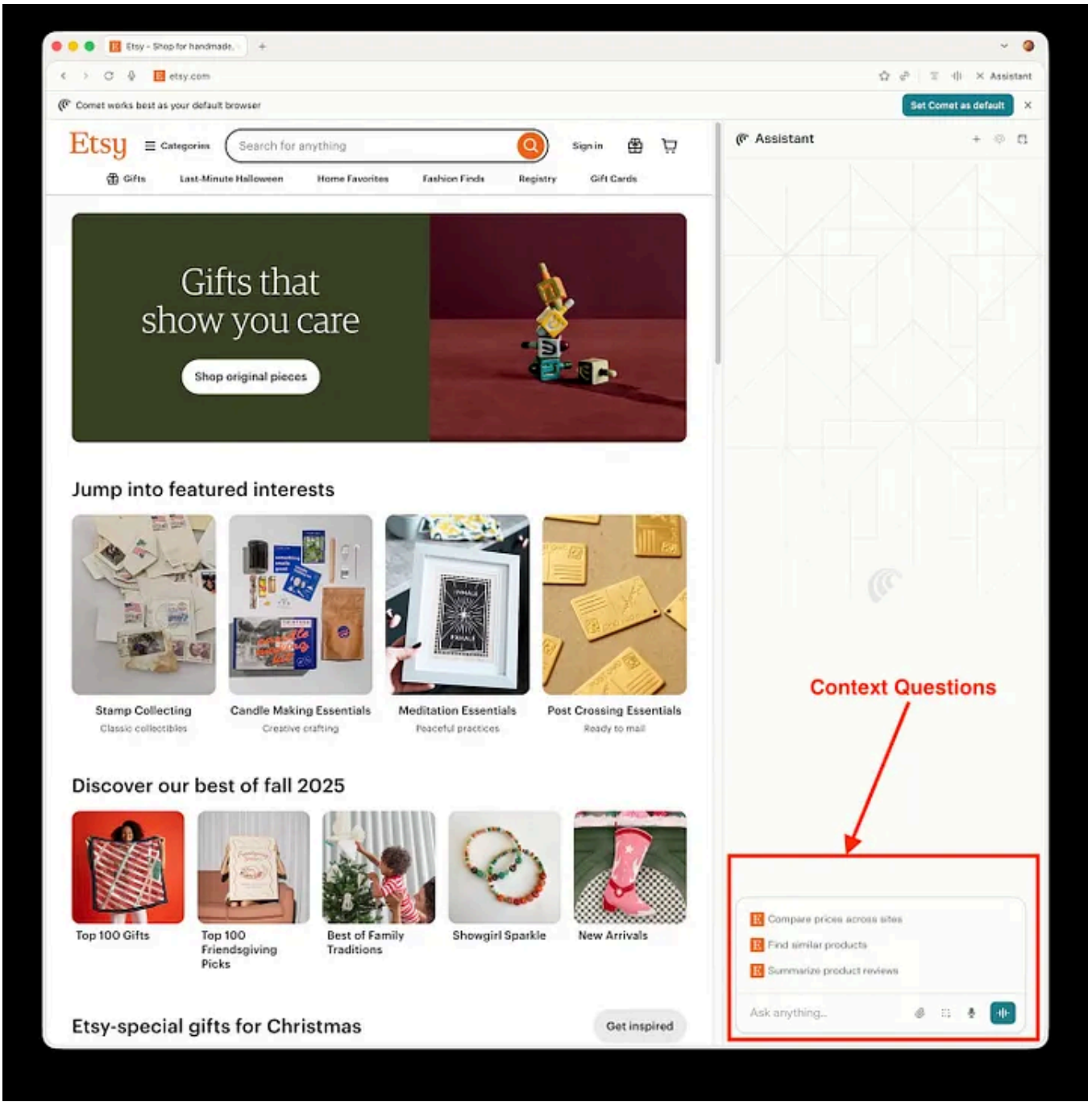
- Wait for benefits to be proven

- Are skeptical and cautious
- Adopt when peer pressure increases or necessity appears
- Resist change
- Adopt only when it becomes unavoidable or traditional alternatives disappear

A chatbot puts the burden (e.g. cognitive load) on the user to figure out what questions to ask. Does that sound like it solves the *Wait for benefits to be proven* crowd? Not really.

So a way to better prove the benefits and accelerate adoption is to have pre-**defined questions** appear that the user only has to click on to get a result. No thinking. Simple. Easy. Quick.

And, AI browsers can now do that because now **they have context**. They know what page you are on so they can offer suggested questions automatically. Like this:



The assistant on the right shows suggested questions for the website on the left.

That, in and of itself, is a huge win for the skeptical, cautious, users that haven't adopted AI. They don't need to think. It takes the burden off the user of needing to figure out what questions to ask to get a good result.

The **AI browsers provide context**....what do you want to ask questions about?. The browser knows what you are looking at so it can suggest questions which is key to skeptical, cautious, non-power users that have not adopted AI.

Context shifts AI from "type a prompt" to "click a thought." That's the usability breakthrough mainstream users need.

But privacy is a concern with AI browsers. Read more about it here.

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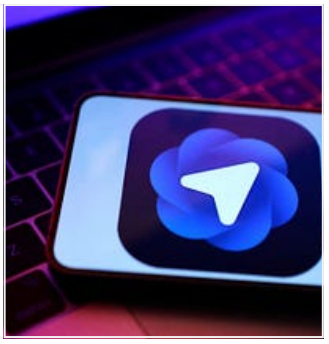

Are Photos a Better Way to Provide Context?

A big part of the problem of convincing the skeptical middle is the whole text-based approach to AI. The current wave started with ChatGPT and text entry. AI browsers reduce text entry friction by suggesting questions but it is still text. You have to read it.

What if there was a more photo centric UI/UX. The user provides a photo for the start of setting the context and intent. Initially, the user has to say: "I want to redecorate this room. How should I do it?" Which is less friction but still typing friction.

You can see signs of this simplicity today. Google Lens is a "search what you see." Amazon allows you to search from your live camera. Both are simpler but it is not yet, to my knowledge, being fed into an overall context aggregation of me.

But what if the AI gets to know you. Meaning, it is aggregating your context then it should know enough that when up provide a picture of a room, it knows enough about you to just provide a new picture of what the redecorated room would look like. Much less friction with this approach. Plus, the AI now has the picture of the room, perhaps the GPS location and more information about your preferences.

Apple is doing this to a certain degree. If you use an iPhone, Apple Intelligence is marketed as using the entire context of information on your iPhone to provide answers. Its all on device and private. What if it was in the cloud and exposed to a much more powerful AI system that you trusted?

Context Aggregtation

In this world, the game becomes **context aggregation**. The company that is able to aggregate the most context about you (likes, preferences, friends, locations, emails, etc...) can produce the most relevant, fast and valuable assistance for you to progress your life. If the user has the trust in the context aggregator, then the attitudinal loyalty is very high and switching risk is very low.

What Will Decide the Winner

To be the company that mostly takes all, faster, loyal adoption is critical. AI browsers alone won't be it. Other factors come in to play.

- Scale and Compute
- Distribution and Defaults
- Advertising Economics
- Regulation and Preparedness

The winner also needs huge economies of scale just like Google. And OpenAI appears to be leading the way with all its deal making for more compute.

To keep executing the Internet search domination playbook, expect distribution deals to appear. Bundles have been the go-to approach. Get installed as the default AI in tools, new computers, new devices and probably a host of new ideas that haven't been tried before.

Advertising. To be the leader, you have to attract the most number of users. Advertising is the only business model that allows a company to chase massive scale at no cost the majority of users (e.g. demand) that they are trying to aggregate.

And then there is regulation. It is hard to say how this will play to the advantage and detriment of a potential winner. You can be sure though that in this war, the players are much more prepared in how to handle the regulation factor than they were in the PC growth era, the Internet browser wars and the Internet search wars.

Behavioral vs Attitudinal Loyalty

A commuter buys coffee from the same gas station every morning because it is on the way to work and quick. This behavior shows loyalty through repeat purchases. But it is driven by habit and convenience, not emotional attachment. If a new coffee shop with better coffee and online ordering opens next door the commuter switches immediately. The loyalty disappears once value and convenience shifts. **That is behavioral loyalty.**

A customer buys every new iPhone and most of the products in Apple's ecosystem. A Samsung Android phone offers much better specs but the customer doesn't switch. Talk to this customer you will hear the emotional attachment, trust, preference and

free word of mouth they espouse. **That is attitudinal loyalty.** Attitudinal loyalty is about what customers feel and think vs. how they behave.

The winner will have to drive **attitudinal loyalty,** not just **behavioral loyalty.** How they do that is a whole other discussion.

The next Google won't just be the tool people use — it'll be the assistant they trust.

. . .

Summary: Context + Loyalty = Dominance

The AI revolution has not arrived for everyone.

AI browsers finally give assistants context — knowing what you're looking at and what you might ask next. That makes them simpler, faster, and more useful for everyone still on the sidelines of AI adoption. Adoption, scale, and emotional loyalty will decide who mostly takes all — and right now, OpenAI is executing that playbook better than anyone.

To take mostly all, adoption is critical but so are the other chapters in the playbook around compute scale, distribution, advertising, attitudinal loyalty and probably other things. OpenAI is probably leading the charge right now in executing each chapter of the playbook. But it's still early in the AI adoption cycle.

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