GenAI网页数据2024年度报告

2024.12.17

郎瀚威

AIwatch.ai

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垂直赛道

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报告作者和联系方式

- 作者郎瀚威，现居美国硅谷Palo Alto
- 更多数据内容请关注公众号：郎瀚威Will
- 新闻资讯请关注推特：@financeyf5 获取更多信息
- 官网飞书：aiwatch.ai
- 商务合作，请加微信lang2057，备注公司信息（微信号已满）
- 如果加群满了请加微信：yf3yf3yf3，备注加群

公众号二维码

群聊：AI报告1群

群聊：AI报告2群

该二维码7天内(12月25日前)有效，重新进入将更新

报告缘起：持续关注AI网页端数据

- 网页端流量依旧是诸多新兴AI2C领域的重要阵地。市面上有众多各个单月榜单，以及APP活跃度数据，而对于网页端连续多月的赛道图表分析比较少。根据我在移动互联网的经验，榜单会在一段时间后，逐步会过渡到垂类赛道的趋势分析。
- 手机端的部分赛道用户量可能远大于网页端，如AIchatbot，虚拟陪伴，图像生成和编辑等领域用户量较大。另一方面限于手机端的输入和输出，一些新兴领域如编程助手等，仅在PC端，或者API使用量。因此观察其趋势，网页端是一个角度。
- 除了赛道数据，还统计了大公司数据（字节），基金/孵化器数据（YC，AIGrant），国别数据（中国/出海）和渠道数据（ProductHunt）。
- 报告的赛道分为两部分，一个是赛道维度。一个是观察标签维度，比如YC孵化器，大公司，独立开发者等。

数据来源：similarweb 单位：万visit

未来12个月的10+个预测

巨头动向：

1. 中美视频巨头会在AI视频领域持续加强投入，效果，科研，工程化会进一步加强。
2. 巨头会更加注重如何结合自己的封闭数据和优势领域去做AI，如腾讯+公众号，字节+抖音视频，推特+Grok
3. 美国AI投资热度会持续，更多企业拿到收入会加剧这一趋势，美股热度不停，短期内一级投资热度也不会停。
4. 巨头们会逐步通过+AI产品快速盈利。

数据来源：similarweb 单位：万visit

未来12个月的10+个预测

垂直赛道

1. AI编程领域会有更大的进展，部分中国公司会跟进。
2. 通用AIchatbot领域马太效应会进一步增强。
3. 浏览器插件会更受重视（编程，AIchatbot等）。
4. AI搜索，AI浏览器，竞争会进一步白热化，成为chatbot以外的兵家必争之地。
5. 垂类搜索会成为垂类产品标配。
6. AI Agent平台会进一步教育用户，如推出教程等。
7. AI生图，AI生视频会进一步在动漫，游戏侧应用。
8. AI语音基建逐步成熟，基于对话交互的AI语音小应用，会出现一批。

数据来源：similarweb 单位：万visit

未来12个月的10+个预测

出海，流量，增长：

1. SEO技术会受到更多出海开发者的重视，并且拿到结果。SEO是一个综合营销的结果。
2. 更多基于Claude底层的应用会拿到流量。
3. 基于用户公开数据的AI社交爆款会出现5-10款（wordware类型），数据来源如基于推特，linkedin数据等。
4. 出海会更卷，如传统出海、APP出海，更多跨界玩家加入，各个赛道更加拥挤。
5. 出海双端部署是趋势，PC拿创作者，APP端拿流量。

数据来源：similarweb 单位：万visit

aiwatch.ai 郎瀚威Will原创 官网飞书

报告注意点

- 本次报告主要以提供客观数据为主。限于人力有限，本报告除了数据部分，预测部分，前言，大部分是用AI写的。
- 报告对于中国to中国的网页统计不准，这源于Similarweb本身对于中国网页数据有偏差。
- 本报告统计的是网页数据，会有一些反常识（比如说豆包大于kimi）的感觉。需要注意的是本报告并未统计APP数据，一个重要原因是没有好的数据来源。如果读者有知道靠谱的欢迎提供。
- 本次报告的图表结构会有一些冗余，一个原因是希望能较为全面的展示不同赛道的用户分布，因此用了统一的格式。
- 本报告数据手动采集，部分内容仅有2023年11月以后数据，因此在图形化时候会有不全的部分。一些百分比增长数据统计也有有瑕疵。请读者注意自行检查。
- 融资数据仅为对于流量部分的参考，有估算成分，也可能有一些小错误。
- 对于使用API或者插件的领域，统计官网，仅作为参考。Chrome可以参考插件官网，按说是活跃数据。
- 本报告更适合检索阅读。

数据来源：similarweb 单位：万visit

总体分析

总体分析

网页端浏览量 排序

- 大模型聊天类应用独占鳌头 - 头部选手AI ChatBots月访问量达42万,是第二名的近两倍;
- 生产力工具强势崛起 - A浏览器和图像生成功能位居二三名,合计超26万访问量;
- 虚拟角色板块以3.5万访问量排名第四;
- 教育赛道显现潜力 - 语言教育单品访问量破万，领先于音乐和视频赛道;
- 数字化办公需求旺盛 - 从PPT制作到会议总结,多个效率工具入榜前15名。

序号	赛道	24年10月访问量 (万visit)
1	AI ChatBots	421,249
2	AI浏览器	223,425
3	图像生成	42,513
4	虚拟角色	35,730
5	通用写作	21,105
6	搜索	16,079
7	语言教育	10,002
8	音乐	8,581
9	图生视频	8,526
10	PPT	6,105
11	文字转音频	5,037
12	拍照搜题	5,030
13	会议总结	4,642
14	编程助手	3,945
15	数字人	2,095
16	Agent	814

数据来源：similarweb 单位：万visit

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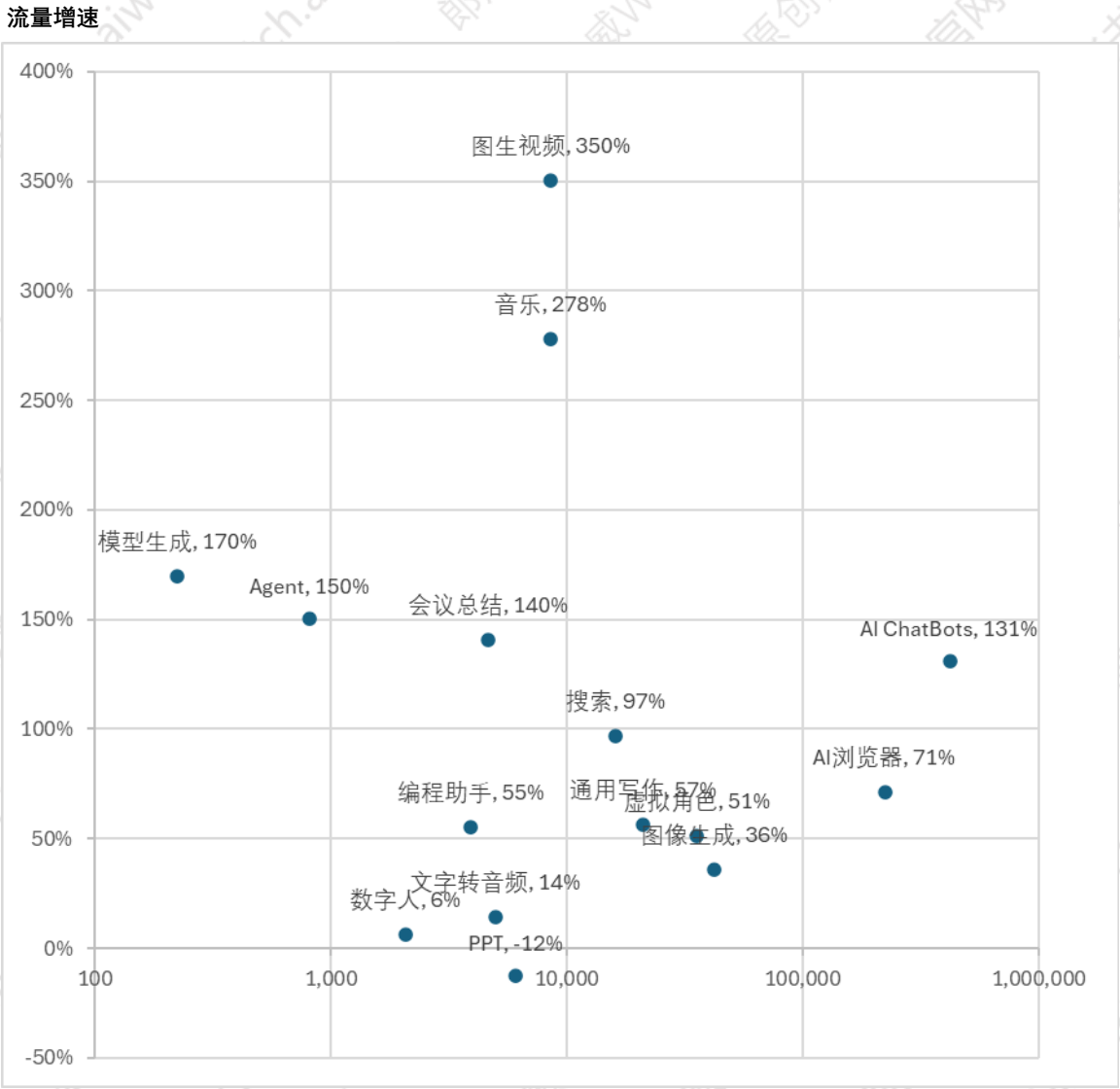
新增访问量排序

- AI赛道冠军 - ChatBot以年度131%的增长率和42万月访问量领跑，累计全年访问近240万；
- 黑马选手 - 图生视频和音乐增速惊人，分别以350%和278%的年增长率领跑增长榜；
- 老牌赛道 - 图像生成、虚拟角色和通用写作三大传统AI应用年增长均在35%-60%区间，显示出成熟赛道的持续成长性。

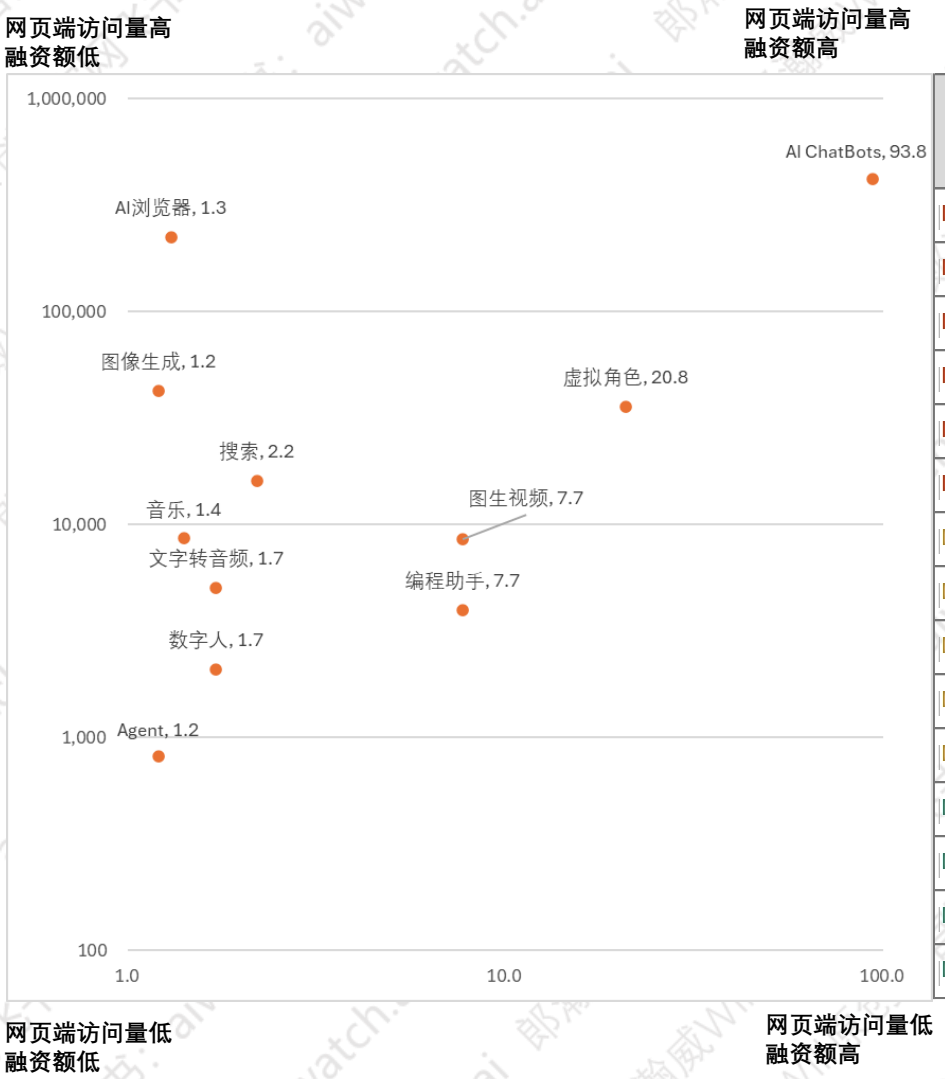
序号	赛道	23年10月访问量（万visit）	24年10月访问量（万visit）	1年增量（万visit）	年度增长
1	AI ChatBots	182,277	421,249	238,972	131%
2	虚拟角色	23,651	35,730	12,079	51%
3	图像生成	31,287	42,513	11,225	36%
4	搜索	8,156	16,079	7,922	97%
5	通用写作	13,482	21,105	7,623	57%
6	图生视频	1,893	8,526	6,633	350%
7	AI音乐	2,269	8,581	6,312	278%
8	会议总结	1,930	4,642	2,711	140%
9	编程助手	2,542	3,945	1,403	55%
10	文字转音频	4,402	5,037	636	14%
11	Agent	325	814	489	150%
12	3D模型生成	83	224	141	170%
13	数字人	1,970	2,095	125	6%
14	PPT	6,955	6,105	-850	-12%



数据来源：similarweb 单位：万visit

融资额排序

- Chatbot是融资额排名第一的领域；
- 虚拟角色中，Pi占了20亿中的13亿，Minimax占了6亿，实际上其他融资的不算太多；
- 编程助手是当之无愧的热门领域；
- 图生视频也是非常热门，而且有诸多视频素材拥有者下场，如快手，抖音等；
- 搜索也较热。



序号	赛道	24年10月访问量（万visit）	头部产品最近融资总额（亿美元）
1	AI ChatBots	421,249	93.8
2	虚拟角色	35,730	20.8
3	编程助手	3,945	7.7
4	图生视频	8,526	7.7
5	搜索	16,079	2.2
6	数字人	2,095	1.7
7	文字转音频	5,037	1.7
8	音乐	8,581	1.4
9	AI浏览器	223,425	1.3
10	Agent	814	1.2
11	图像生成	42,513	1.2
12	语言教育	10,002	1.0
13	拍照搜题	5,030	0.8
14	会议总结	4,642	0.7
15	PPT	6,105	0.6

数据来源：similarweb 单位：万visit

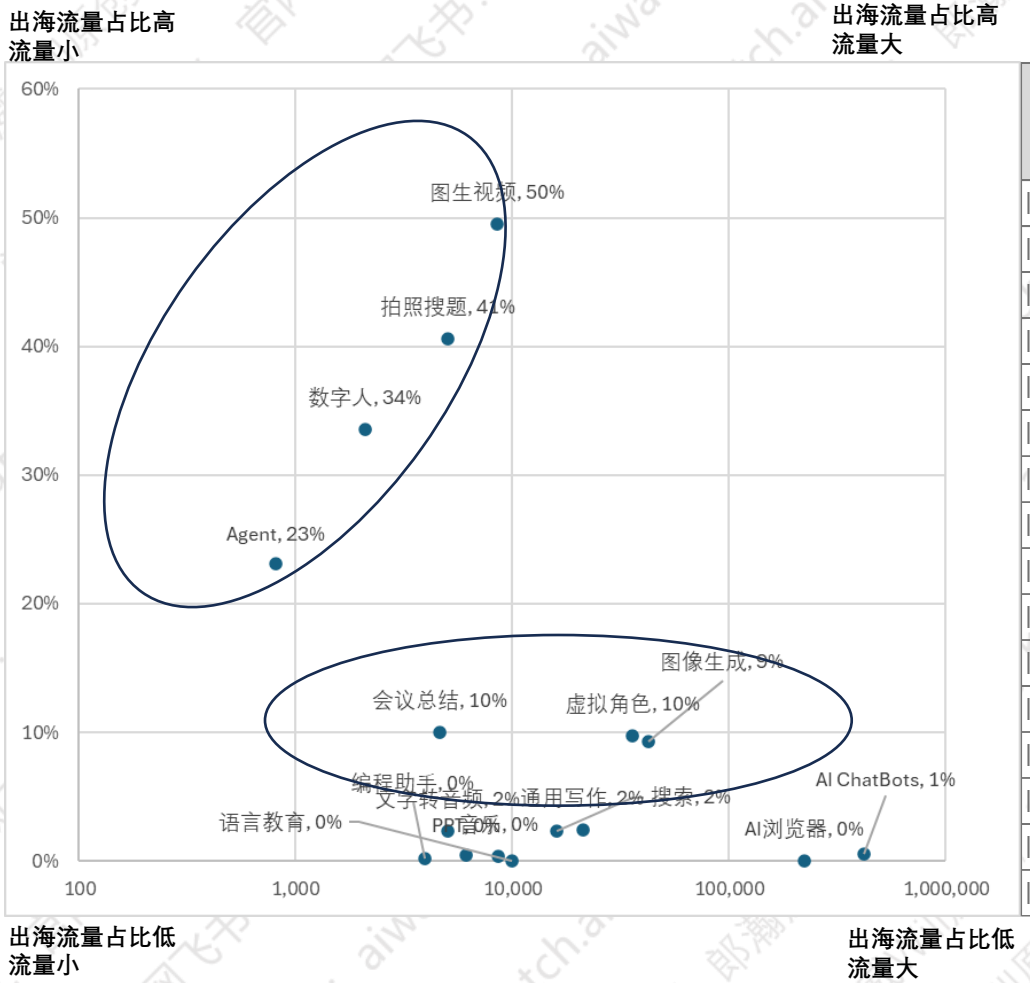
融资额排序细则

序号	赛道	24年10月访问量（万visit）	头部产品最近融资总额（亿美元）	融资详情
1	AI ChatBots	421,249	93.8	OpenAI (OpenAI 4000M$)+Claude (Anthropic 4000M$)+POE (Quora 75M$)+Kimi (月之暗面 300M$)+海螺 AI (MiniMax 600M$)+智谱清言 (智谱 400M$)=9375M$
2	虚拟角色	35,730	20.8	Character.AI (Character.AI 150M$)+Talkie (Minimax 600M$)+Pi (Inflection AI 1300M$)+FlowGPT (FlowGPT 10M$)+MyShell (MyShell 11M$)+CHAI (CHAI 8M$)=2079M$
3	编程助手	3,945	7.7	Cursor (Anysphere 60M$)+Replit agent (Replit 20M$)+v0.dev (Vercel Labs 250M$)+Creatio (Creatio 200M$)+Codeium (Codeium 150M$)+Warp AI (Warp AI 50M$)+CodeRabbit (CodeRabbit 16M$)+Tabnine (Tabnine 25M$)=771M$
4	图生视频	8,526	7.7	Hailuo AI (MiniMax 600M$)+Pika (Pika Labs 80M$)+Luma AI (Luma AI 43M$)+Haiper AI (Haiper 13.8M$)+Pixverse (爱诗科技 14M$)+Viggle (Viggle 18M$)=768.8M$
5	搜索	16,079	2.2	Perplexity AI (Perplexity 62.7M$)+You (You.com 50M$)+Metaso (秘塔 14.5M$)+iAsk (iAsk 4.2M$)+Wrtn (Wrtn 17.5M$)+Consensus (Consensus 11.5M$)Kagi Search (Kagi Search 1.9M$)+Genspark (Genspark 60M$)=222.3M$
6	数字人	2,095	1.7	Heygen (诗云科技 60M$)+Synthesia (Synthesia 90M$)+Colossyan (Colossyan 22M$)=172M$
7	文字转音频	5,037	1.7	Eleven Labs (Eleven Labs 80M$)+PlayHT (PlayHT 21M$)Podcastle (Podcastle 13.5M$)+Resemble (Resemble 8M$)+AssemblyAI (AssemblyAI 50M$)=172.5M$
8	音乐	8,581	1.4	Suno AI (Suno 125M$)+Udio (Udio 10M$)+Musicfy (Musicfy 0.2)=135.2M$
9	AI浏览器	223,425	1.3	Opera (Opera 84M$)+Arc浏览器 (The Browser Company 50M$)=134M$
10	Agent	814	1.2	Dify.ai (Dify.ai 2.85)+Wordware (Wordware 30M$)+Hex Magic (Hex Magic 28M$)+AutoGPT (AutoGPT 12M$)+Lindy (Lindy 35M$)+Altera (Altera 9M$)=116.85M$
11	图像生成	42,513	1.2	Leonardo.Ai (Leonardo.Ai 31M$)+Civitai (Civitai 5.1M$)+Ideogram (Ideogram 80M$)=116.1M$
12	语言教育	10,002	1.0	Preply (Preply 42M$)+ELSA Speak(ELSA 23M$)+Speak(20M$)+All Right(AllRight 1M$)+Loora(Loora 12M$)=98M$
13	拍照搜题	5,030	0.8	QANDA (MathPresso 77M$)
14	会议总结	4,642	0.7	Tactiq (Tactiq 2.2M$)+Read AI (Read AI 50M$)+Fathom2.0 (Fathom 17M$)=69.2M$
15	PPT	6,105	0.6	Gamma AI (Gamma AI 12M$)+Tome (Tome 43M$)=55M$

数据来源：similarweb 单位：万visit

出海占比排序示意图

- 出海占比靠前的几个领域前几个几乎都是和图像，视频，语音相关；
- 另一个维度是都属于需要更多工程化细节的维度；
- 出海流量占比计算方法：出海网页端流量/国际流量+出海流量+国产流量。



序号	赛道	24年10月访问量（万visit）	国际占比	出海占比	国产占比
1	图生视频	8,526	49%	50%	2%
2	拍照搜题	5,030	56%	41%	3%
3	数字人	2,095	64%	34%	3%
4	Agent	814	58%	23%	19%
5	会议总结	4,642	88%	10%	2%
6	虚拟角色	35,730	90%	10%	0%
7	图像生成	42,513	89%	9%	2%
8	通用写作	21,105	95%	2%	3%
9	文字转音频	5,037	98%	2%	0%
10	搜索	16,079	85%	2%	13%
11	AI ChatBots	421,249	97%	1%	2%
12	PPT	6,105	96%	0%	3%
13	音乐	8,581	99%	0%	1%
14	编程助手	3,945	97%	0%	2%
15	语言教育	10,002	97%	0%	3%
16	AI浏览器	223,425	97%	0%	3%

数据来源：similarweb 单位：万visit

AI Chatbots

AI Chatbots

AI Chatbots – Takeaway

1. AIchatbot是最大的领域，也是功能最多最宽泛的领域，其除了文字需求还能满足多模态需求（生图，语音对话，写作），部分还包括搜索，虚拟陪伴，Agent等需求。比如chatgpt的dalle可以生图，可以语音聊天，豆包，kimi也包含了搜索功能。
2. 总体数据显示，AI Chatbot总访问量达到41.8亿次/月，其中ChatGPT以36.6亿次独占鳌头，Google Gemini以2.9亿次位居第二，Claude以0.84亿次排名第三。
3. 从增速来看，Kimi增速很快，Claude实现241%增长，ChatGPT保持116%的稳健增长。
4. 5-7名均为中国产品（kimi，百度，豆包），中国用户占比达90%以上。
5. 浏览器插件，粘性很强，稳步增长，是出海创业公司的一个很好的切入点，注意，其实际用量可能远大于主站流量。
6. 本次只统计网页端，国内chatbot手机端流量很大。（实际上手机端输入输出的限制，只有4~5个品类的流量入口，Chatbot，AI浏览器，虚拟陪伴，图像生成）

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

AI Chatbots - Top15

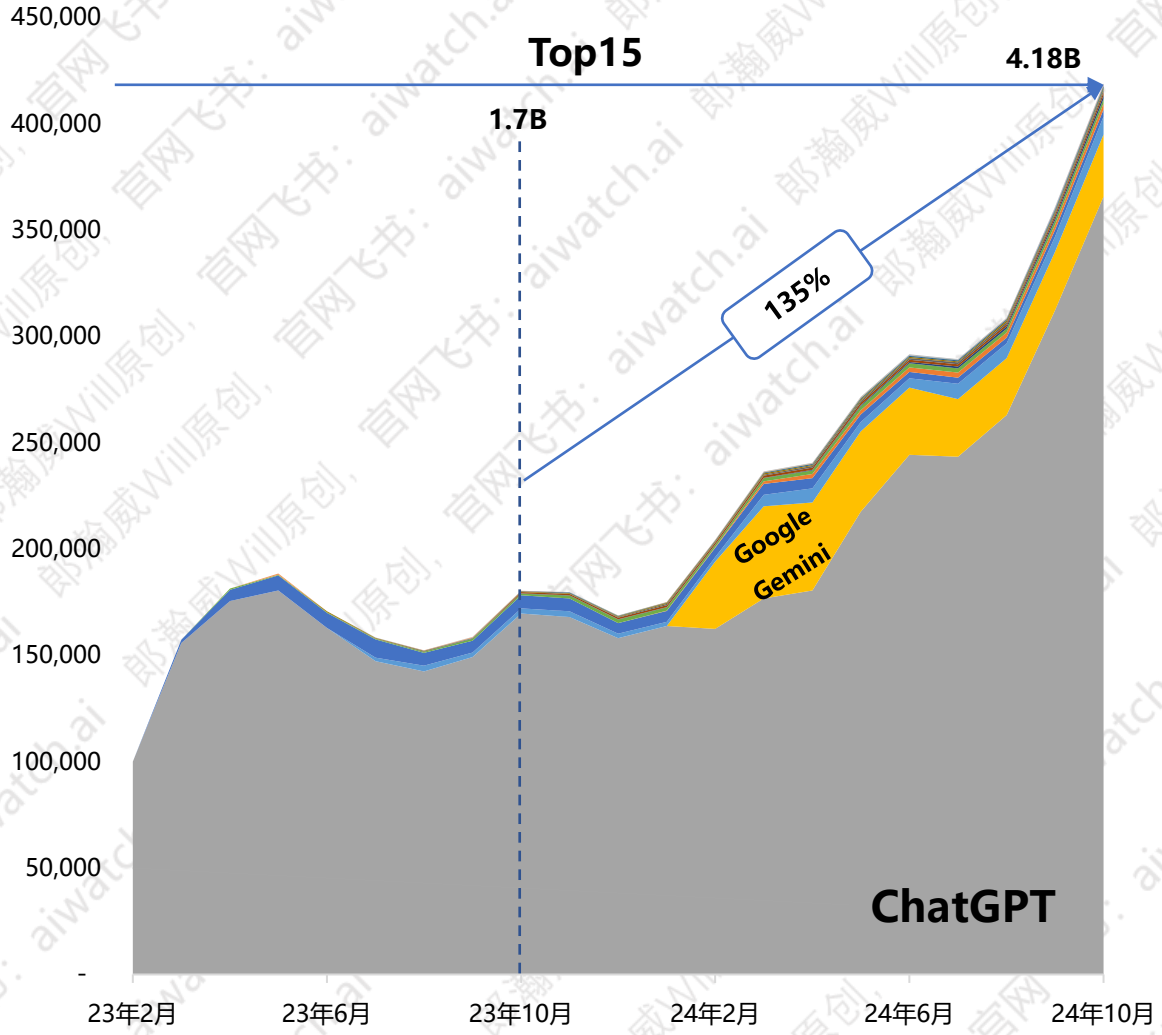
- **TOP15 总融资额：93.75亿美元** (OpenAI (OpenAI 4000M$)+Claude (Anthropic 4000M$)+POE (Quora 75M$)+Kimi（月之暗面 300M$)+海螺 AI (MiniMax 600M$)+智谱清言 (智谱 400M$)=9375M$)
- **Top15 总网页流量：41.8亿次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	ChatGPT	169,800	366,000	116%	OpenAI	Debt Financing	2024/10/3	4000	3700	United States	18%
2	Google Gemini		29,160	-	Google Gemini	-	-	-	-	United States	15%
3	Claude	2,462	8,405	241%	Anthropic	企业融资	2024/11/22	4000	-	United States	27%
4	POE	6,086	3,339	-45%	Quora	风险轮	2024/1/10	75	-	Hong Kong	28%
5	Kimi 智能助手	15	2,863	18987%	月之暗面	Venture Round	2024/8/5	300	-	China	93%
6	百度文心一言	769	2,111	175%	百度	-	-	-	-	China	95%
7	抖音豆包AI	73	1,688	2212%	字节	-	-	-	-	China	93%
8	DeepAI	632	1,459	131%	DeepAI	-	-	-	-	United States	29%
9	阿里通义千问	34	1,012	2876%	阿里	-	-	-	-	China	89%
10	Monica	240	832	247%	蝴蝶效应	-	-	-	-	United States	6%
11	Sider	195	579	197%	Sider	-	-	-	-	India	8%
12	Cici	24	469	1856%	字节跳动	-	-	-	-	Philippines	50%
13	海螺 AI		415	-	MiniMax	B轮	2024/3/5	600	-	China	24%
14	百度Chat	122	389	219%	百度	-	-	-	-	China	95%
15	智谱清言	60	364	507%	智谱	Venture Round	2024/5/31	400	-	China	90%

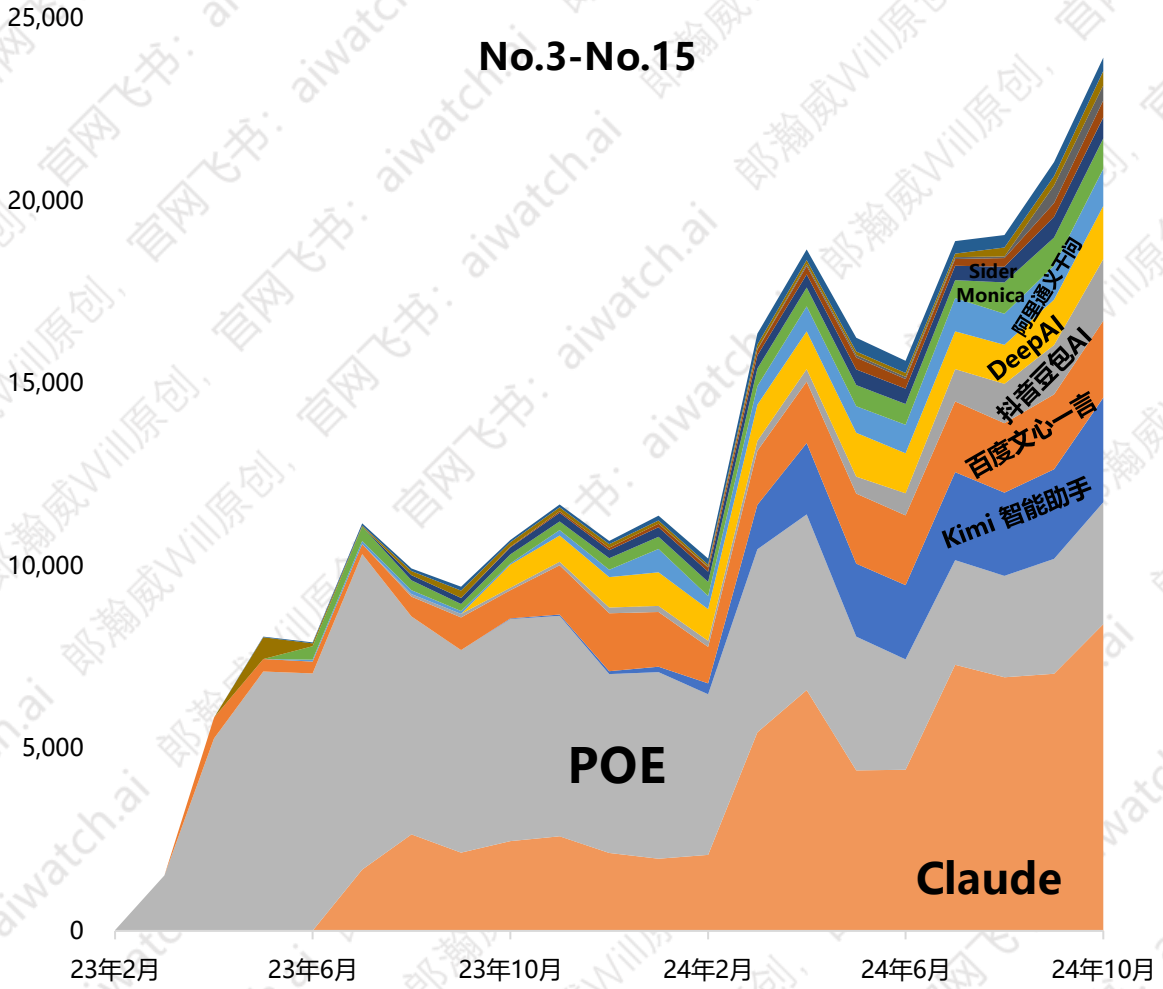
数据来源：similarweb 单位：万visit

AI Chatbots 网页流量趋势 10月总量：41.8亿

- AI对话市场快速扩张，网页端总访问量从23年10月的17.8亿增长至24年10月的41.8亿，大盘规模实现135%增长。



- 3-15名梯队此消彼长：POE访问量下滑明显，而Claude稳步增长；第5-10名被中国产品强势占据，以Kimi、文心一言为代表的本土产品自24年2月开始集中发力。

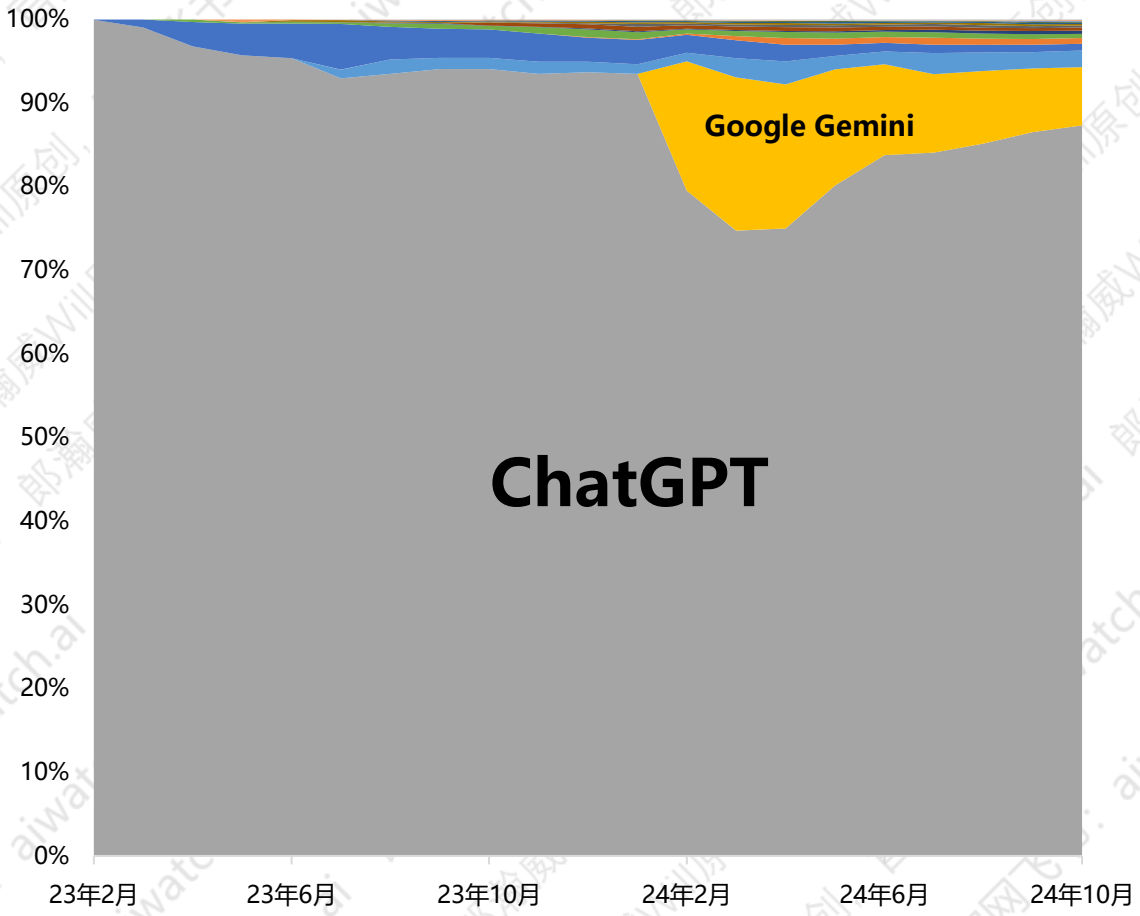


数据来源：similarweb 单位：万visit

AI Chatbots 2023.2~2024.10 网页流量占比

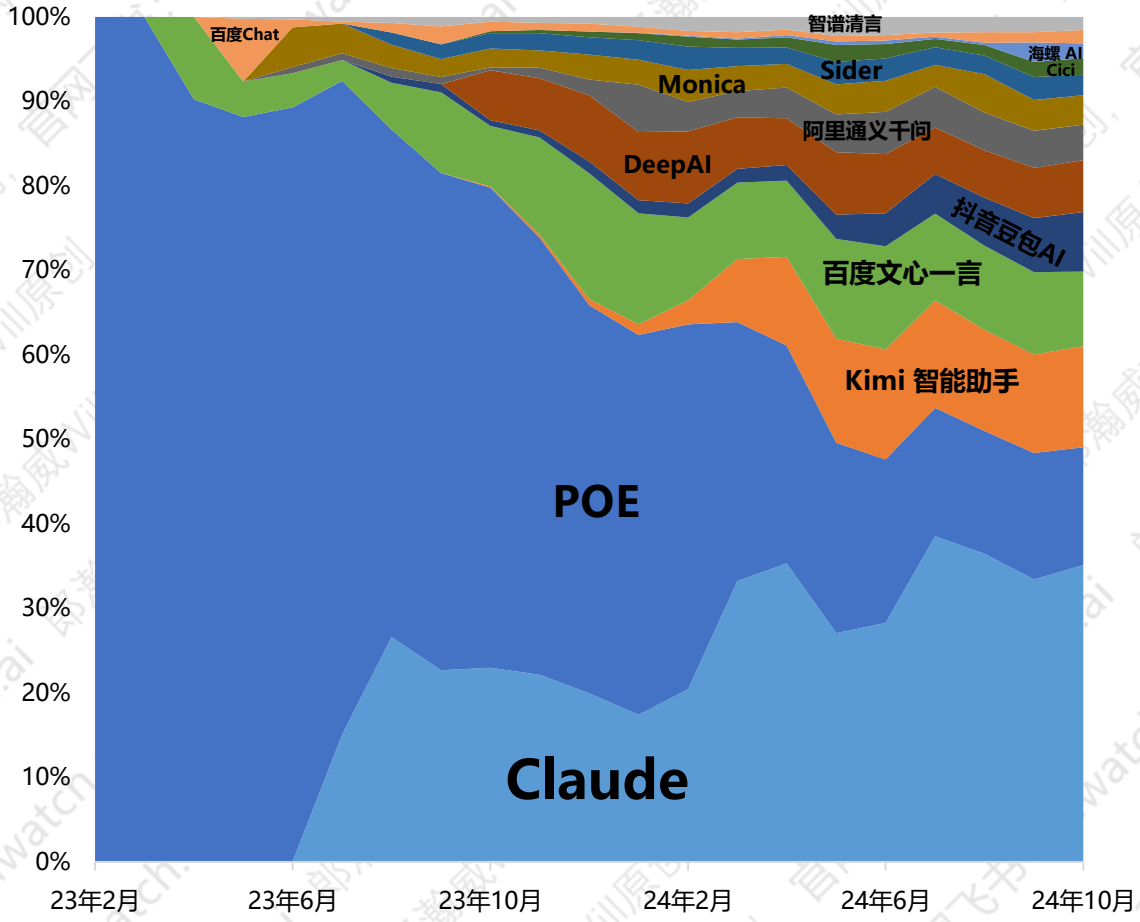
- 从龙头企业来看，ChatGPT依然保持绝对优势，以超过80%的市占率稳居第一。Google Gemini作为新晋玩家，迅速跻身第二，展现出强大的发展潜力。

Top15占比



- 3-15名格局重构：POE份额大幅下滑，Claude稳步提升，中国产品Kimi、文心一言、豆包AI异军突起

No.3-No.15占比



数据来源：similarweb 单位：万visit

AI Chatbots 国际 | 国产 | 出海 Top10

国际

- Chatgpt高一个数量级的存在

序号	产品名称	24年10月 (万visit)
1	ChatGPT	366,000
2	Google Gemini	29,160
3	Claude	8,405
4	POE	3,339
5	DeepAI	1,459
6	AiChatting	190
7	Chaport	139
8	Grok Ai assistant	131
9	Chai AI Chai Research	128
10	Agnai	125

国产

- 反直觉的是Kimi在网页端是比豆包多的

序号	产品名称	24年10月 (万visit)
1	Kimi 智能助手	2,863
2	百度文心一言	2,111
3	抖音豆包AI	1,688
4	阿里通义千问	1,012
5	海螺 AI	415
6	百度Chat	389
7	智谱清言	364
8	DeepSeek	265
9	讯飞星火	206
10	腾讯元宝	116

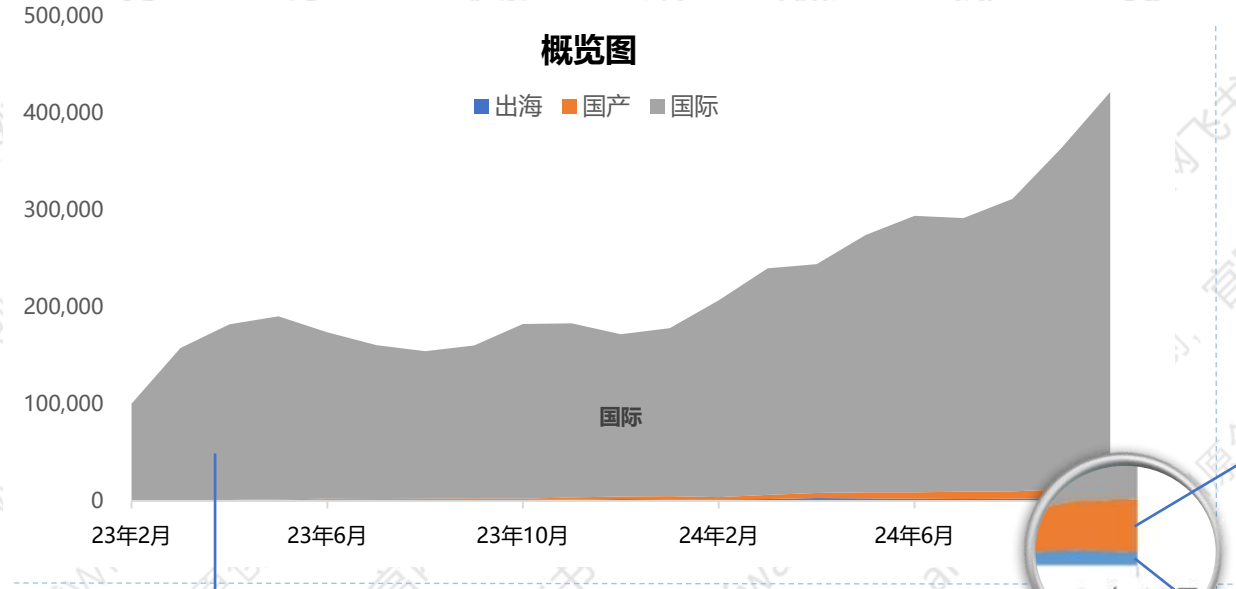
出海

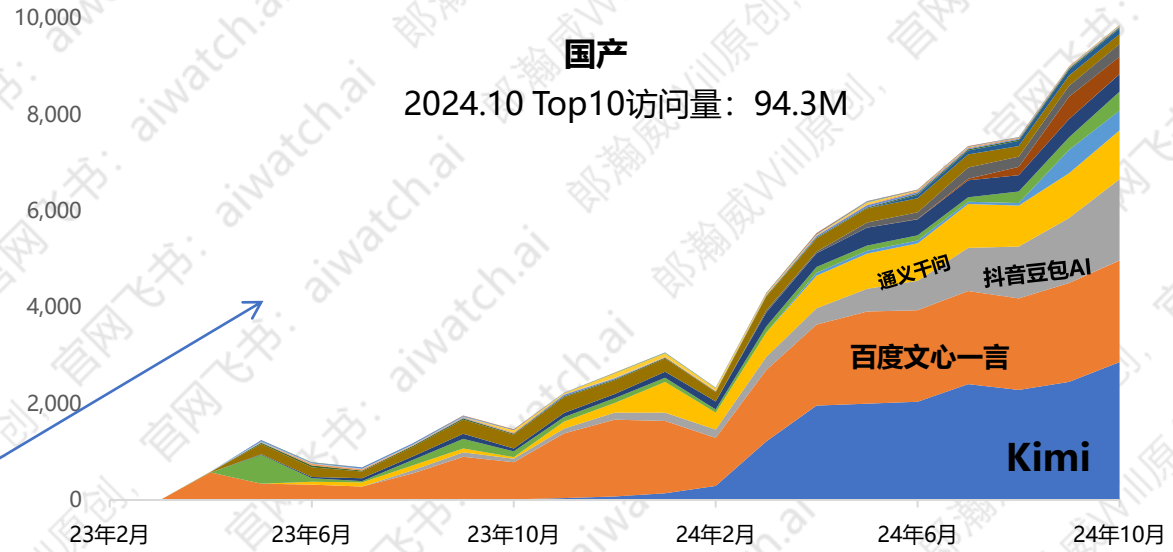
- 出海创业公司主要是浏览器插件

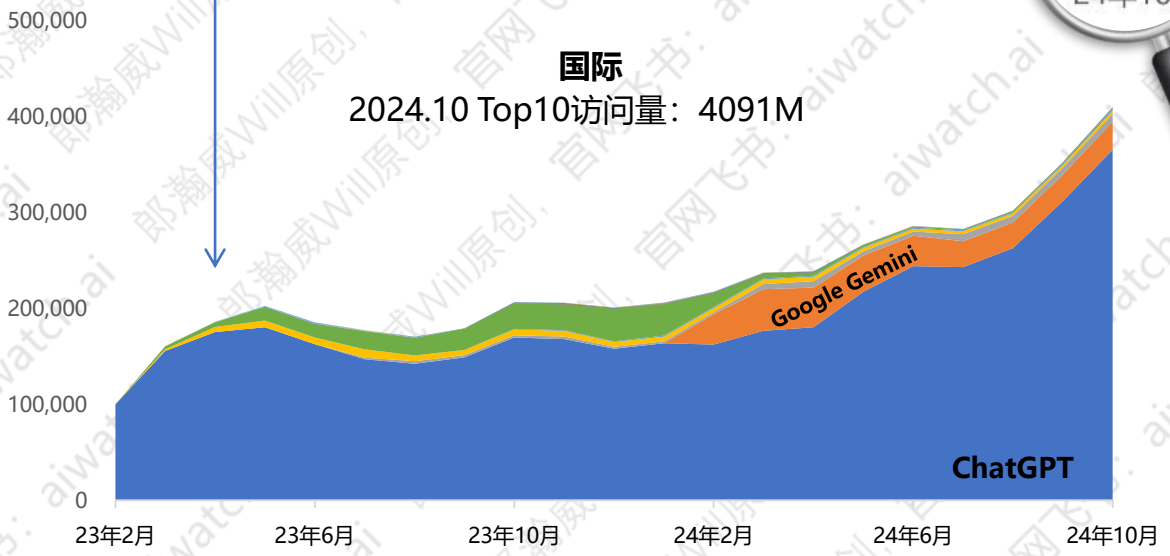
序号	产品名称	24年10月 (万visit)
1	Monica	832
2	Sider	579
3	Cici	469
4	MaxAI.me	291
5	PopAi	164
6	Theb.ai	61
7	Jina AI	42
8	SynClub	1

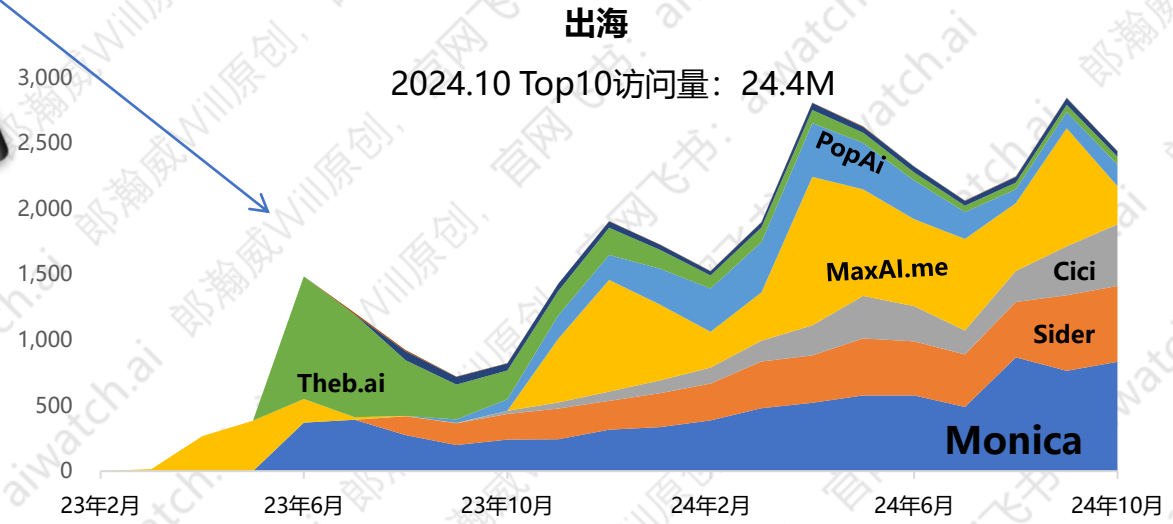
数据来源：similarweb 单位：万visit

AI Chatbots 国际 97% | 国产 2% | 出海 1%





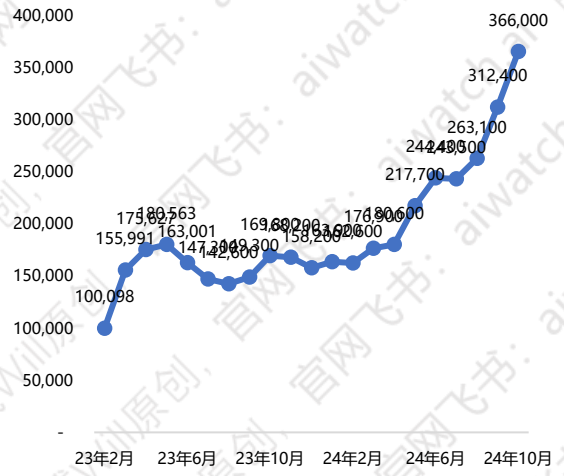




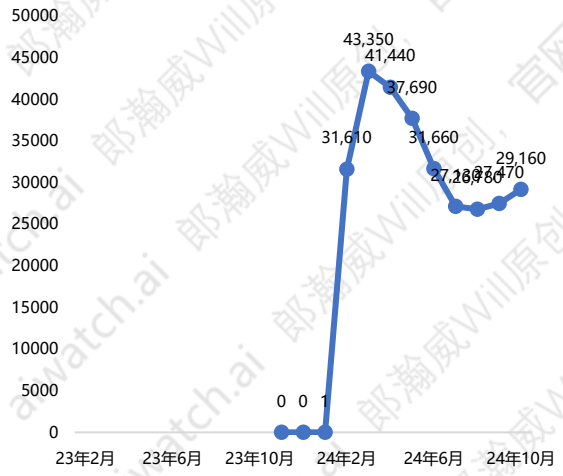
数据来源：similarweb 单位：万visit

AI Chatbots No.1-No.8

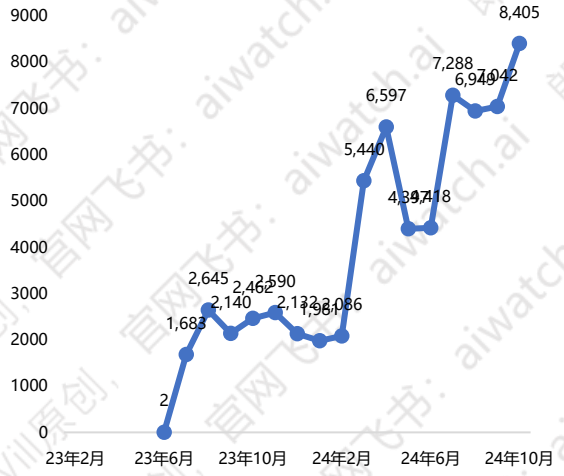
1 ChatGPT



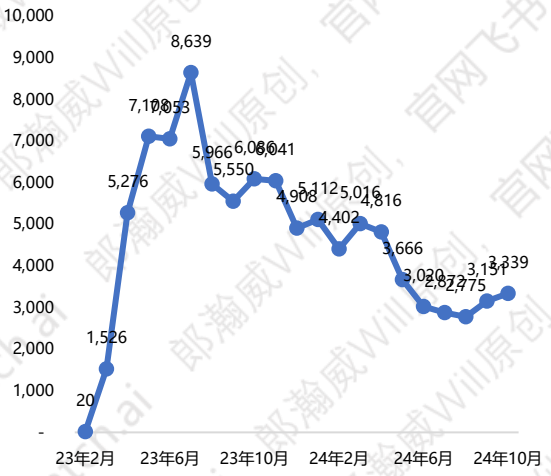
2 Google Gemini



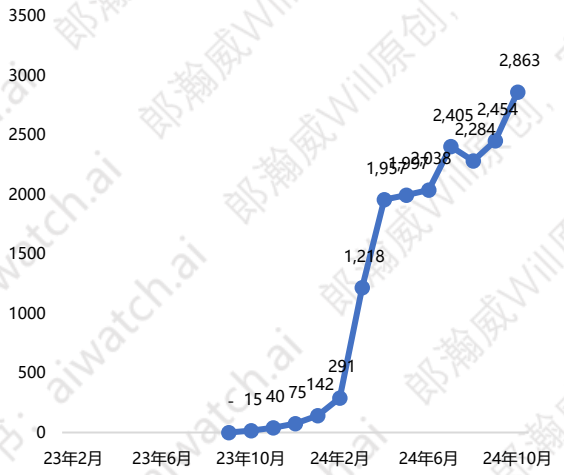
3 Claude



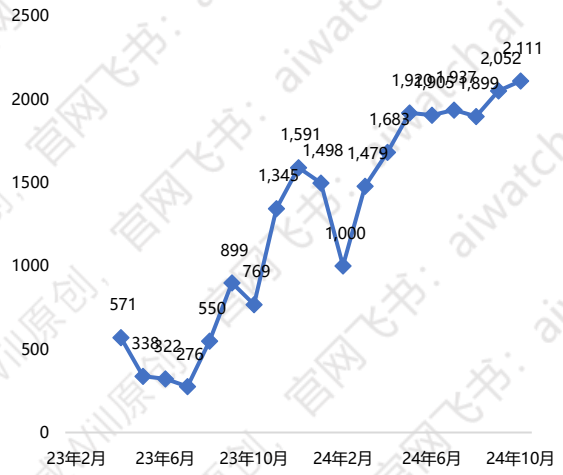
4 POE



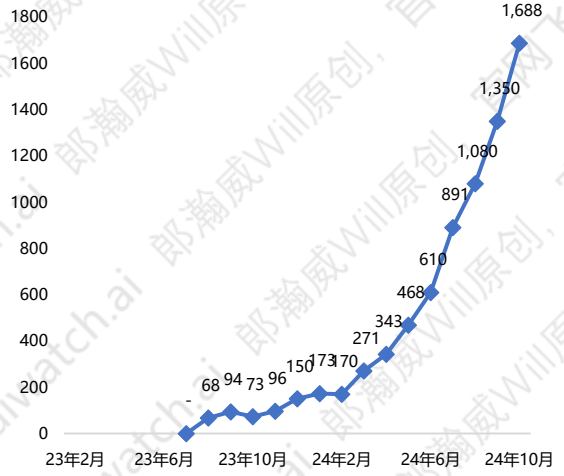
5 Kimi 智能助手



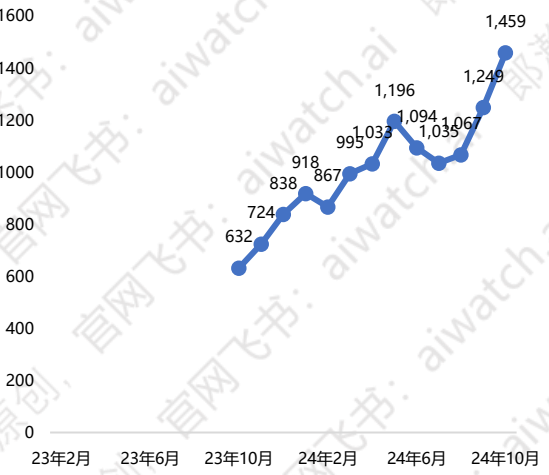
6 百度文心一言



7 抖音豆包AI



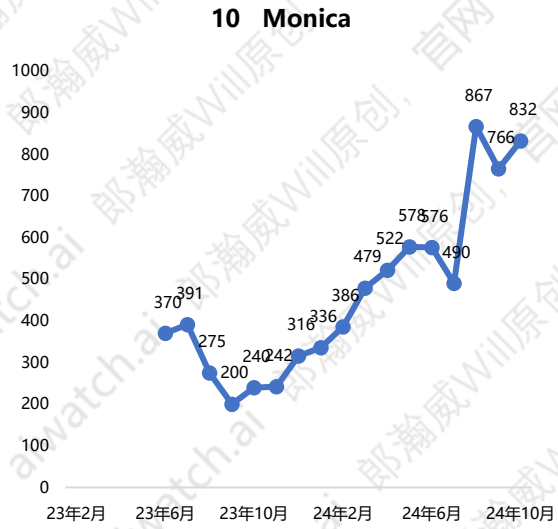
8 DeepAI

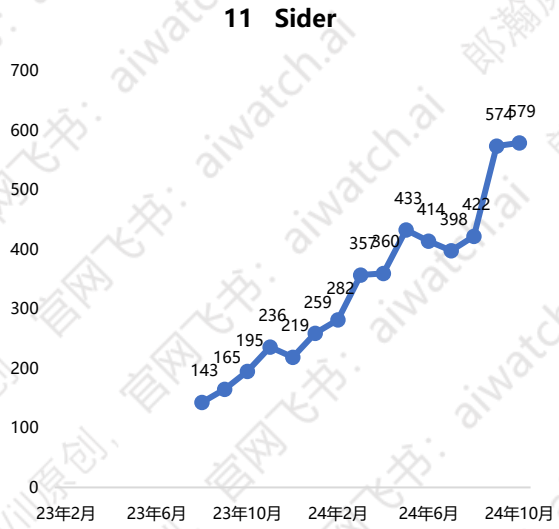


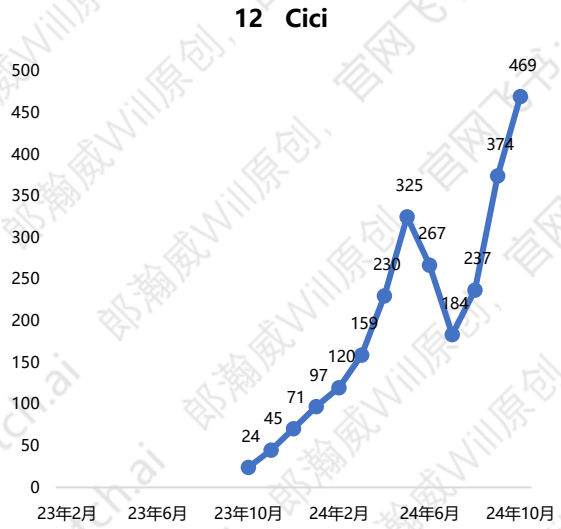
数据来源：similarweb 单位：万visit

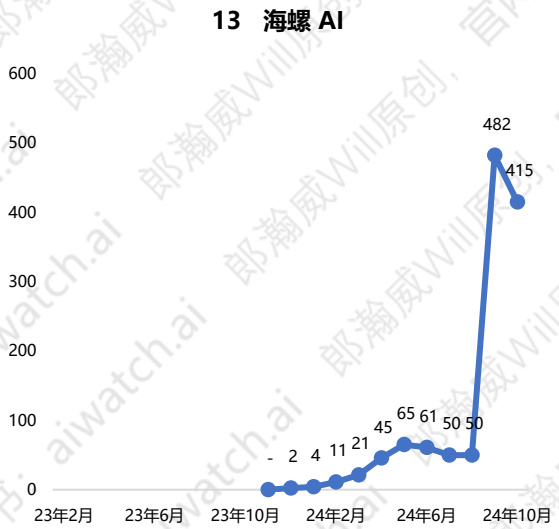
郎瀚威Will原创，官网飞书：aiwatch.ai

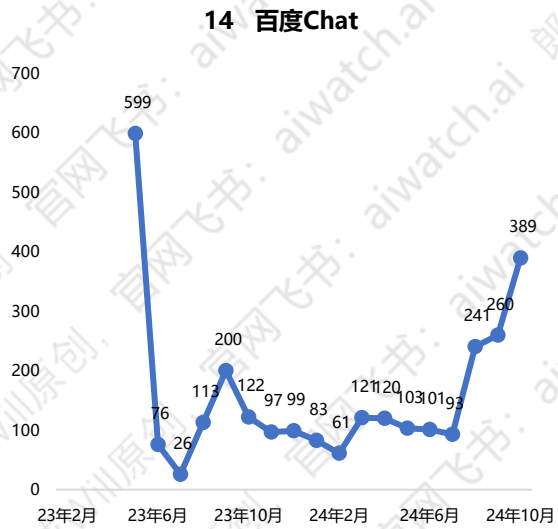
AI Chatbots No.9-No.16

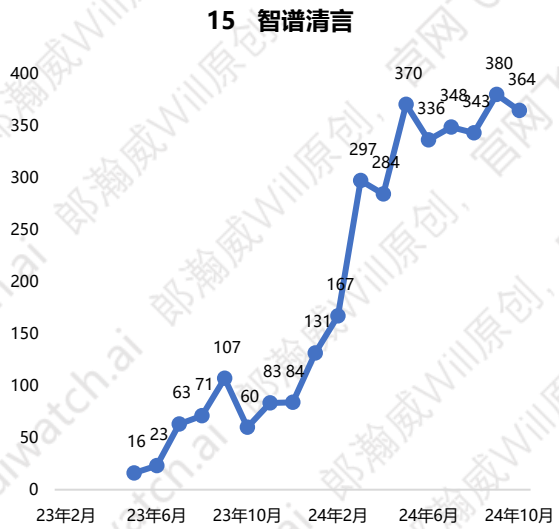


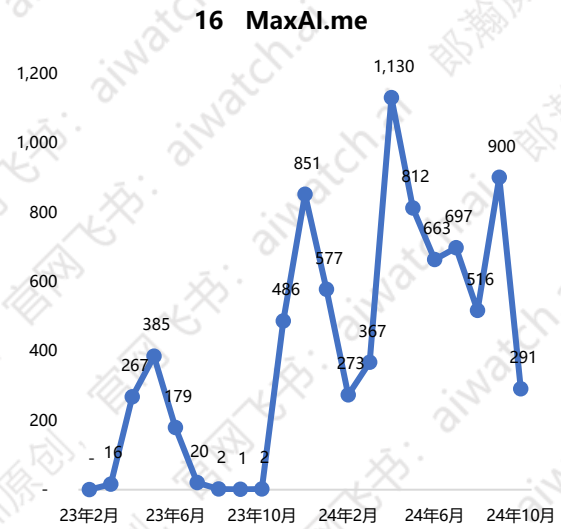










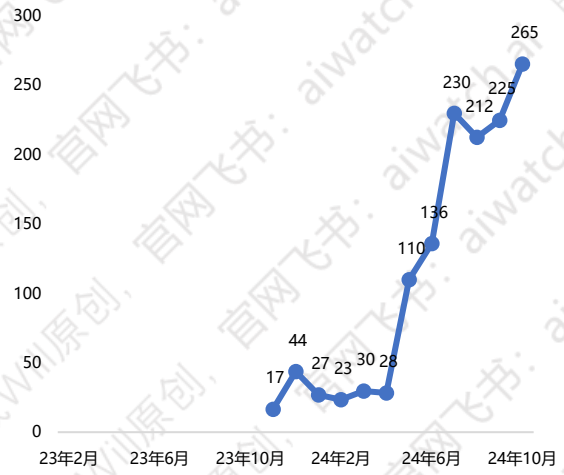


数据来源：similarweb 单位：万visit

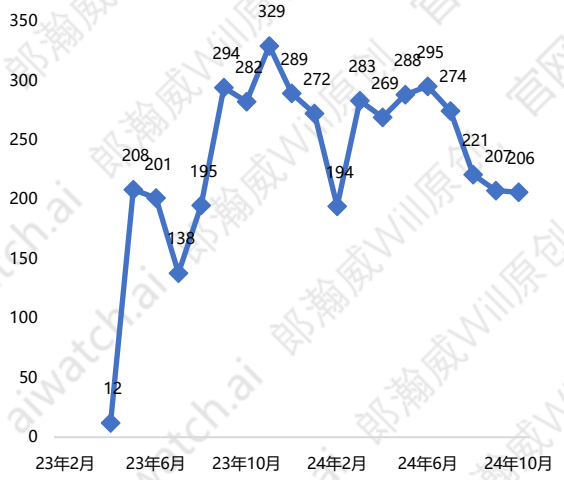
郎瀚威Will原创，官网飞书：aiwatch.ai

AI Chatbots No.17-No.24

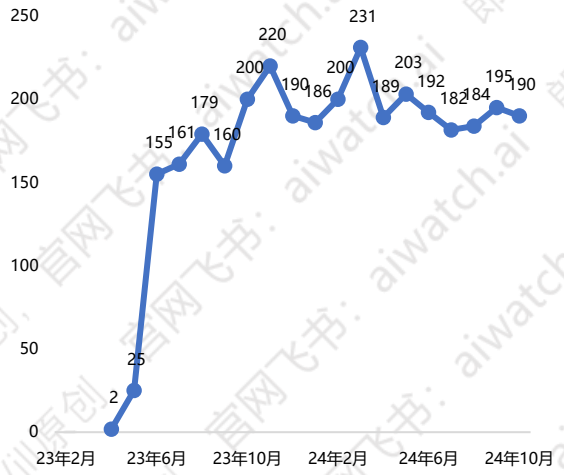
17 DeepSeek



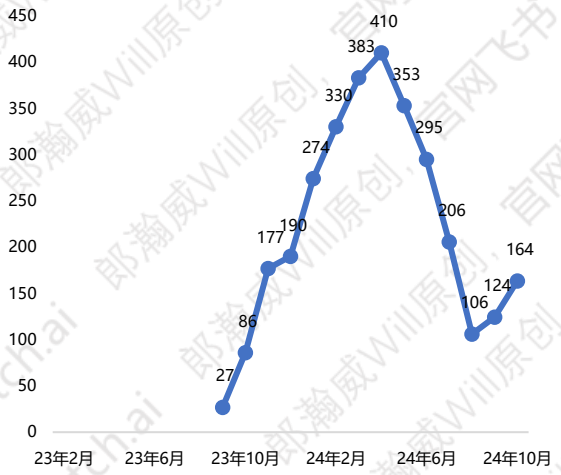
18 讯飞星火



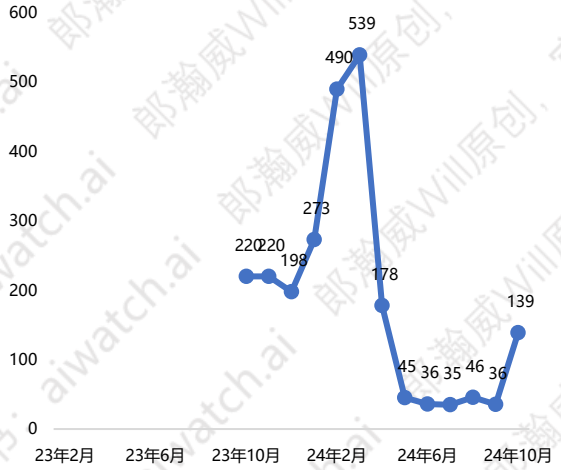
19 AiChatting



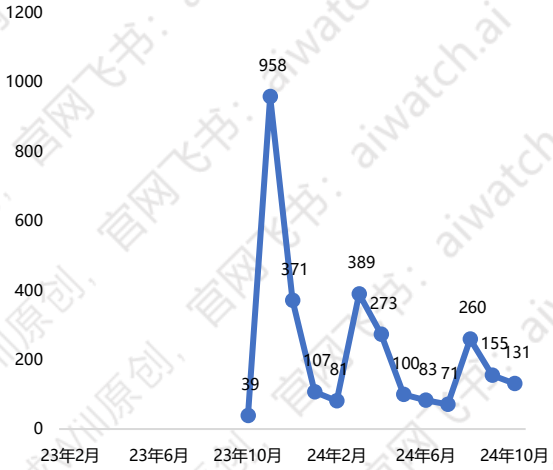
20 PopAi



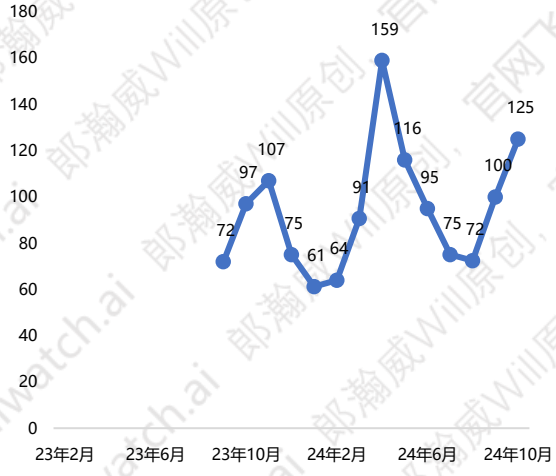
21 Chaport



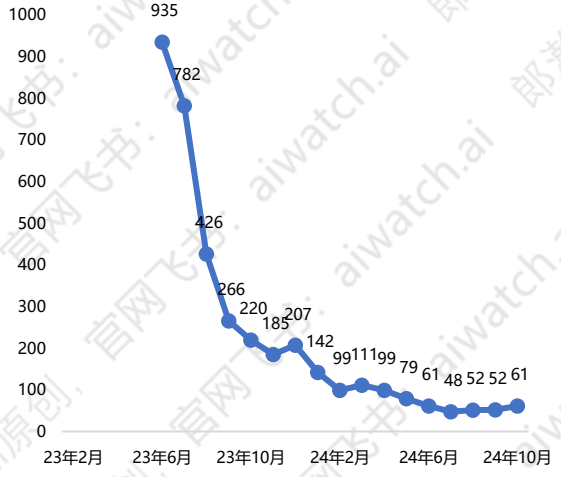
22 Grok Ai assistant



23 Agnai



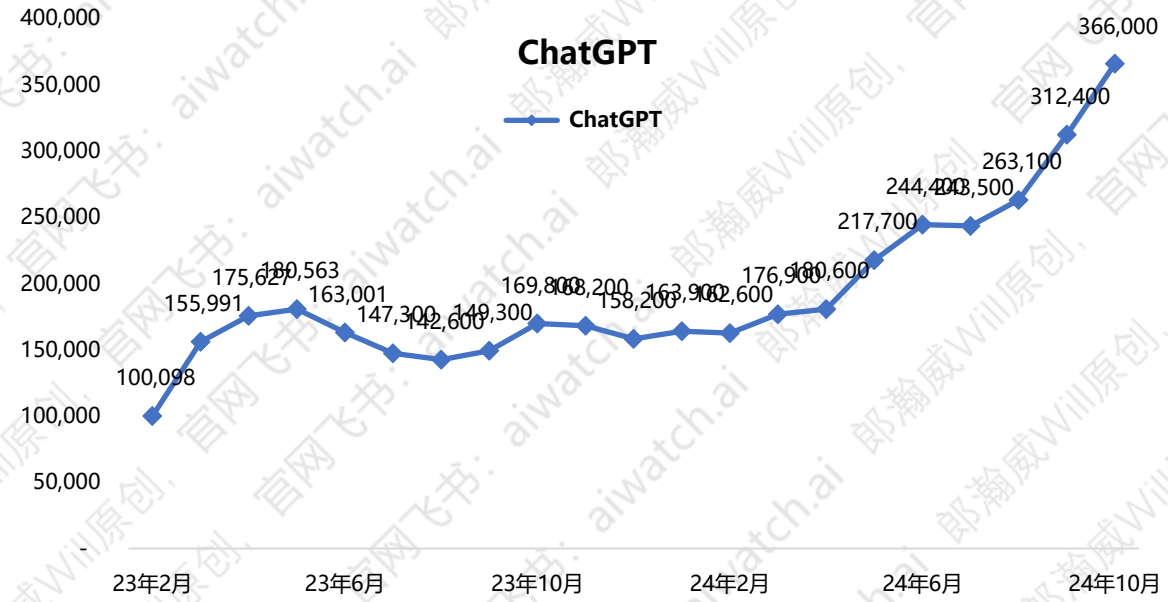
24 Theb.ai

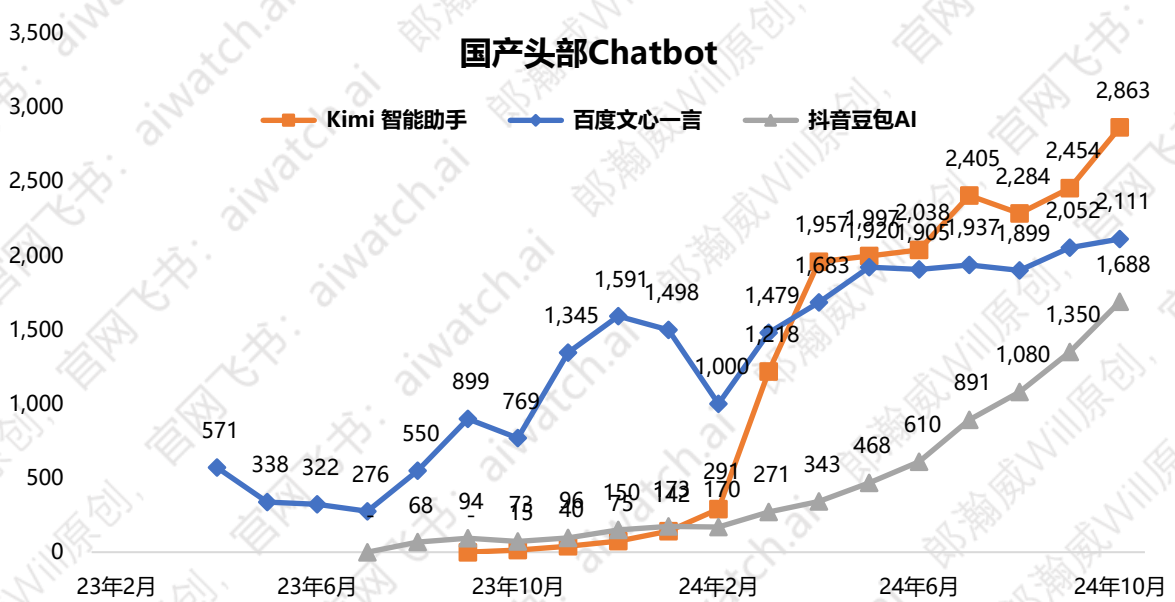


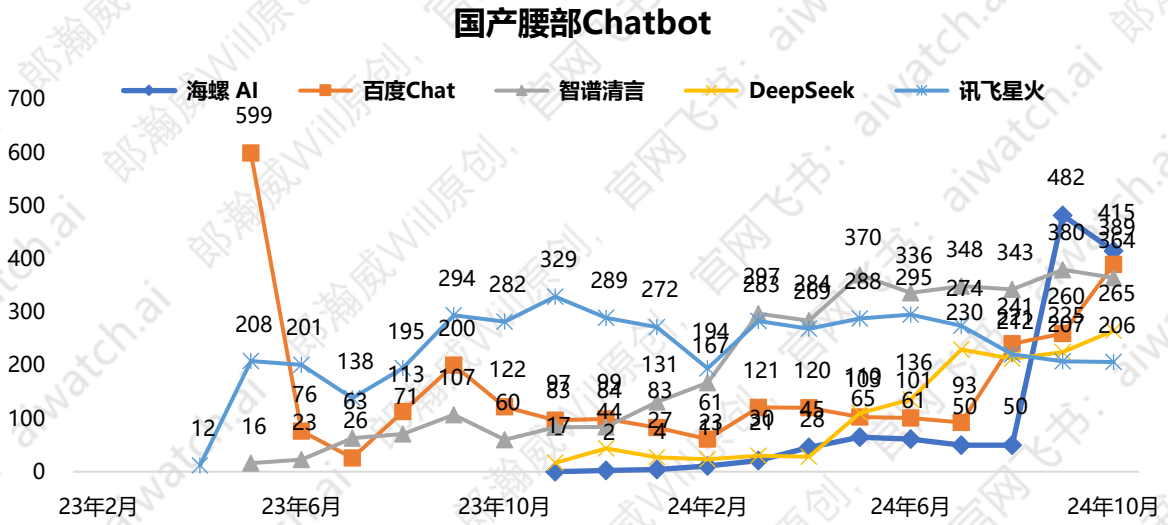
数据来源：similarweb 单位：万visit

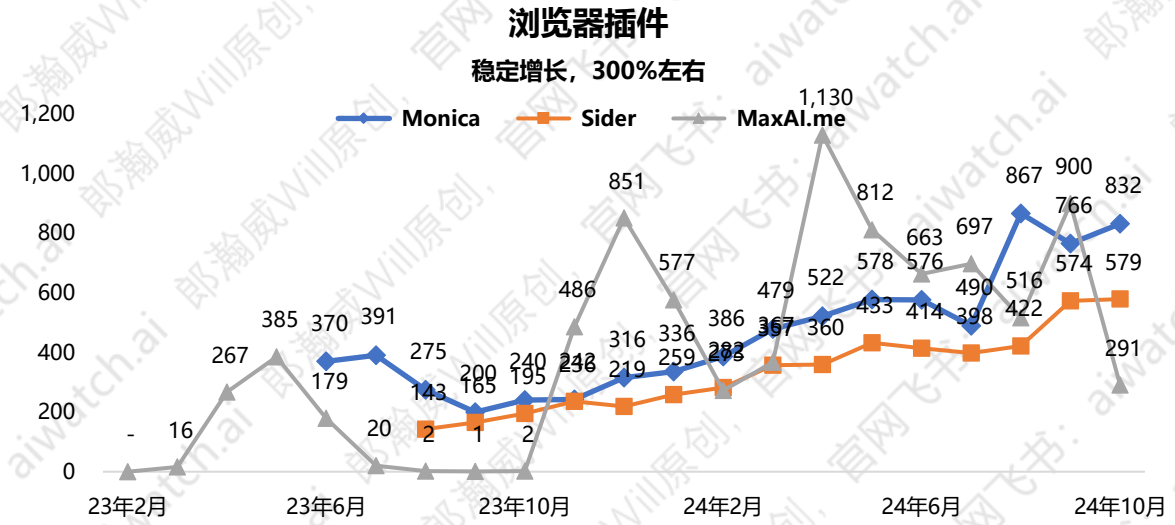
郎瀚威Will原创，官网飞书：aiwatch.ai

AI Chatbots 复合图表







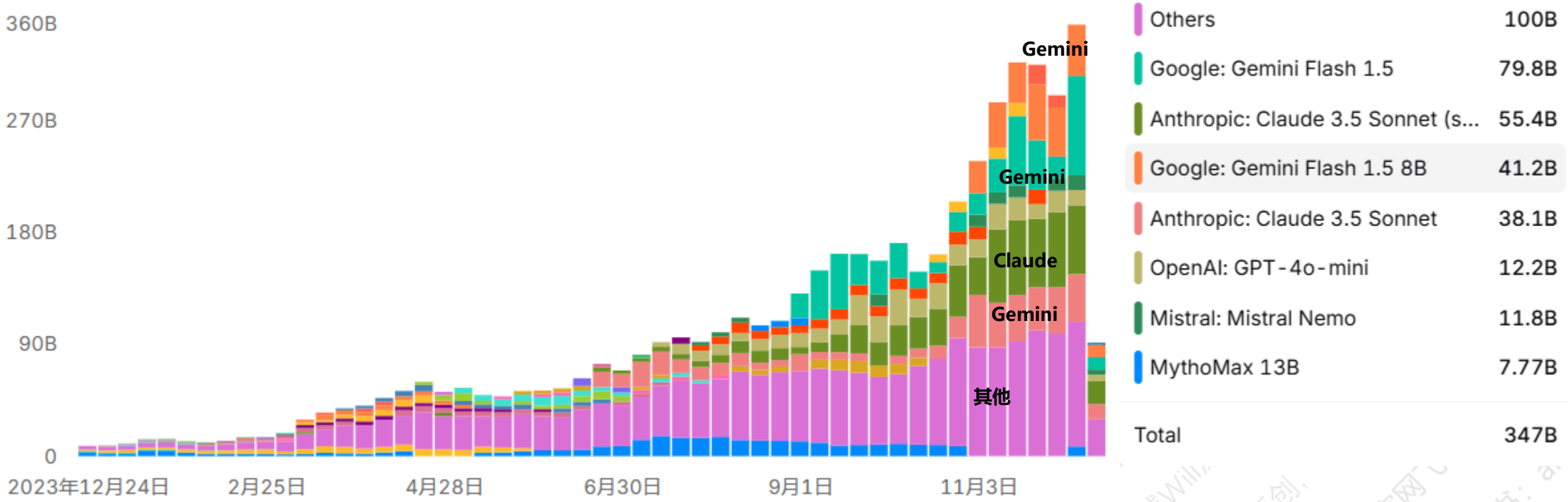


数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

AI Chatbots API使用量趋势（不完全统计）

- C端使用量仅仅是一方面
- 根据openrouter.ai的统计
- Google Gemini 在开发者中的市场份额从 9 月份的 ~5% 上升到上周的 >50% 市场份额
- Claude系列占35%以上



AI搜索

AI搜索 – Takeaway

1. 2024年10月AI搜索赛道TOP15总访问量达1.5亿次。
2. 行业第一梯队由Perplexity AI、BlackBox AI和You构成，月访问量分别达9078万、1372万和687万次，其中Perplexity AI一枝独秀。
3. 从增速表现看，BlackBox AI以292%的同比增长最为突出，Perplexity AI增长91%，而You则下降50%，头部格局出现明显变化。
4. 融资方面，2024年共有8笔融资，包括Perplexity AI的6270万美元B轮、Genspark的6000万美元种子轮，以及Wrtn的1750万美元B轮融资。
5. 中国本土AI搜索产品在第二梯队表现抢眼，秘塔Metaso、C知道等产品月访问量均超过400万，用户占比均超过89%。
6. 值得关注的是，学术搜索赛道展现活力，如Consensus同比增长144%，表明AI搜索在垂直领域的应用前景广阔。

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

AI搜索 - Top15

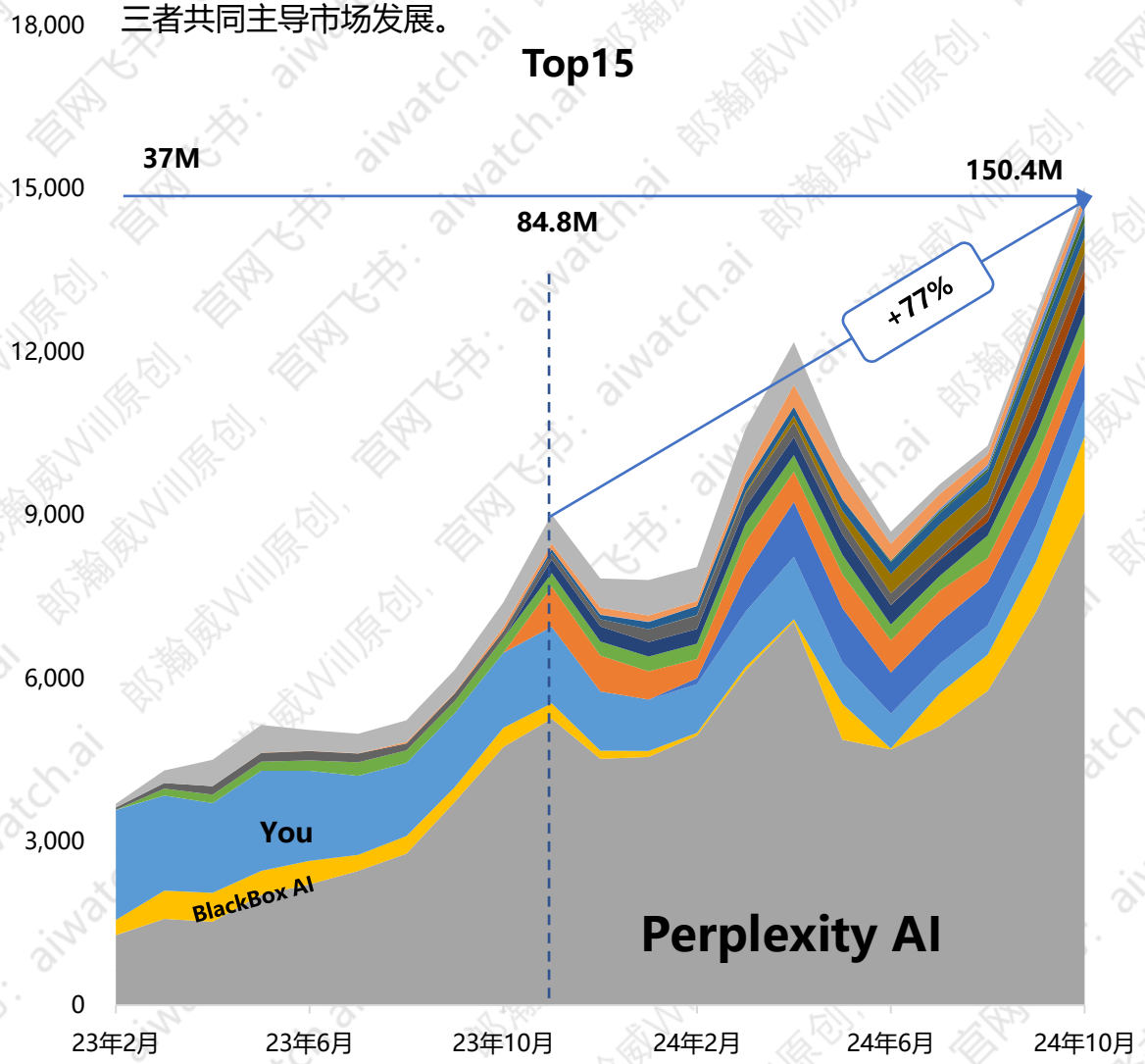
- **TOP15总融资额：6.6亿美元** (Perplexity AI (Perplexity 500M$)+You (You.com 50M$)+Metaso (秘塔 14.5M$)+iAsk (iAsk 4.2M$)+Wrtn (Wrtn 17.5M$)+Consensus (Consensus 11.5M$)Kagi Search (Kagi Search 1.9M$)+Genspark (Genspark 60M$)=659.6M$)
- **Top15 总网页流量：1.5亿次visit**

序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Perplexity AI	4,747	9,078	91%	Perplexity	B轮	2024/4/23	500	50	United States	26%
2	BlackBox AI	350	1,372	292%	BlackBox	-	-	-	-	Indonesia	26%
3	You	1,377	687	-50%	You.com	B轮	2024/6/17	50	10	United States	19%
4	秘塔Metaso		665	-	秘塔科技	风险投资轮	2024/8/8	14.5	-	China	89%
5	C知道		468	-	CSDN.NET	-	-	-	-	China	92%
6	iAsk	276	445	61%	iAsk	种子轮	2024/2/28	4.2	-	United States	41%
7	Wrtn		439	-	Wrtn	B轮	2024/6/6	17.5	-	South Korea	97%
8	知乎直答		363	-	知乎	-	-	-	-	China	93%
9	Consensus	125	305	144%	Consensus	A轮	2024/7/23	11.5	1.5	United States	11%
10	360AI搜索		290	-	360	-	-	-	-	China	94%
11	Kagi Search		264	-	Kagi Search	融资轮	2024/5/30	1.9	-	United Kingdom	33%
12	Genspark		175	-	Genspark	种子轮	2024/6/18	60	-	Japan	65%
13	Felo		174	-	Sparticle	-	-	-	-	China	29%
14	天工AI	72	164	128%	昆仑万维	-	-	-	-	China	97%
15	Phind	456	151	-67%	Phind AI	-	-	-	-	Russia	16%

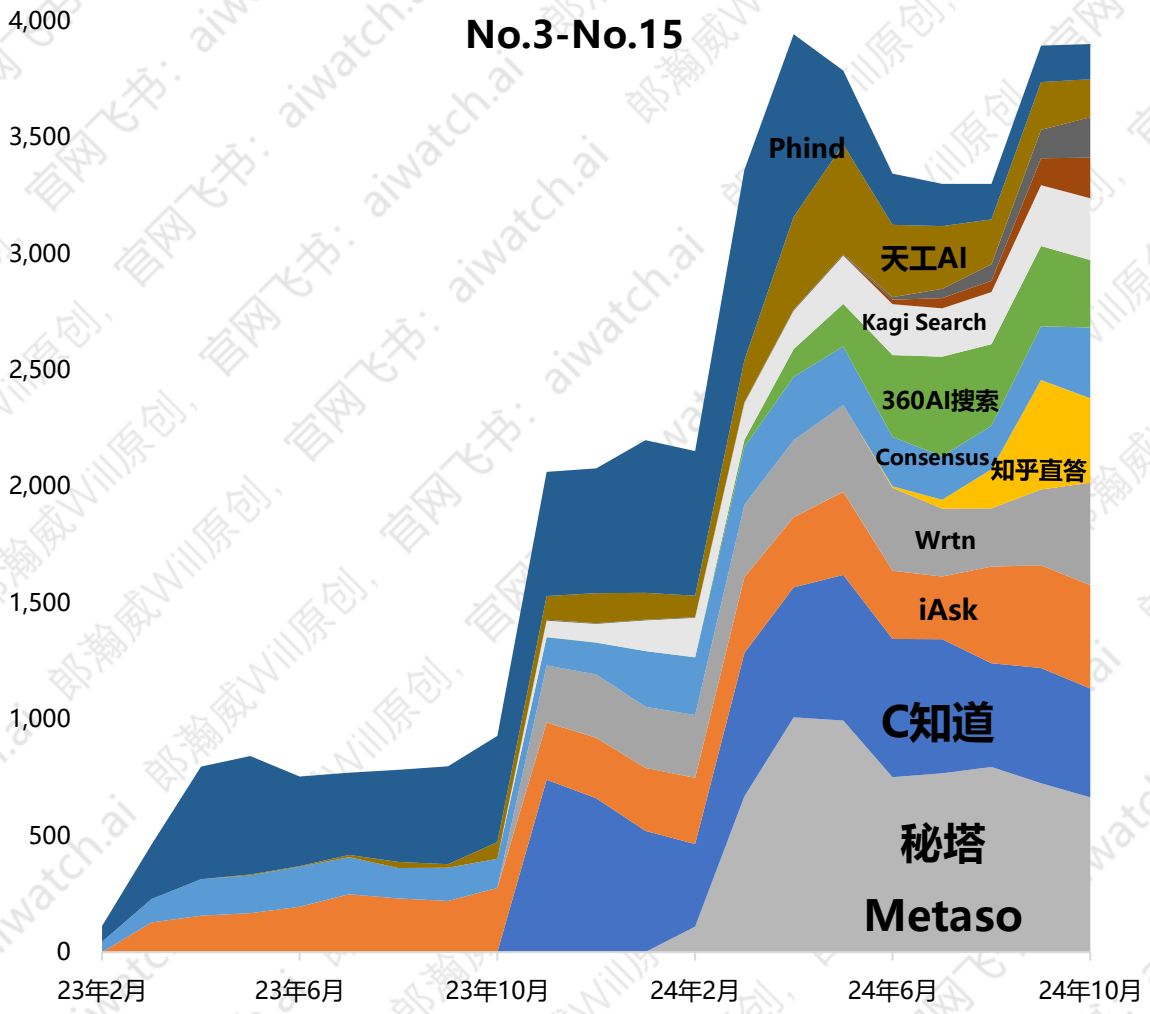
数据来源：similarweb 单位：万visit

AI搜索　网页流量趋势　10月总量：1.5亿

- Perplexity AI的领先优势不断扩大，月访问量接近1亿。BlackBox AI凭借近3倍的增长跃居第二，而You虽然流量下滑但仍保持第三位置，三者共同主导市场发展。



- 秘塔Metaso、C知道等中国产品快速崛起，iAsk增长61%表现亮眼，而新进入者如360AI搜索、Kagi Search等也逐渐成为市场不可忽视的力量，第二梯队竞争日趋激烈。

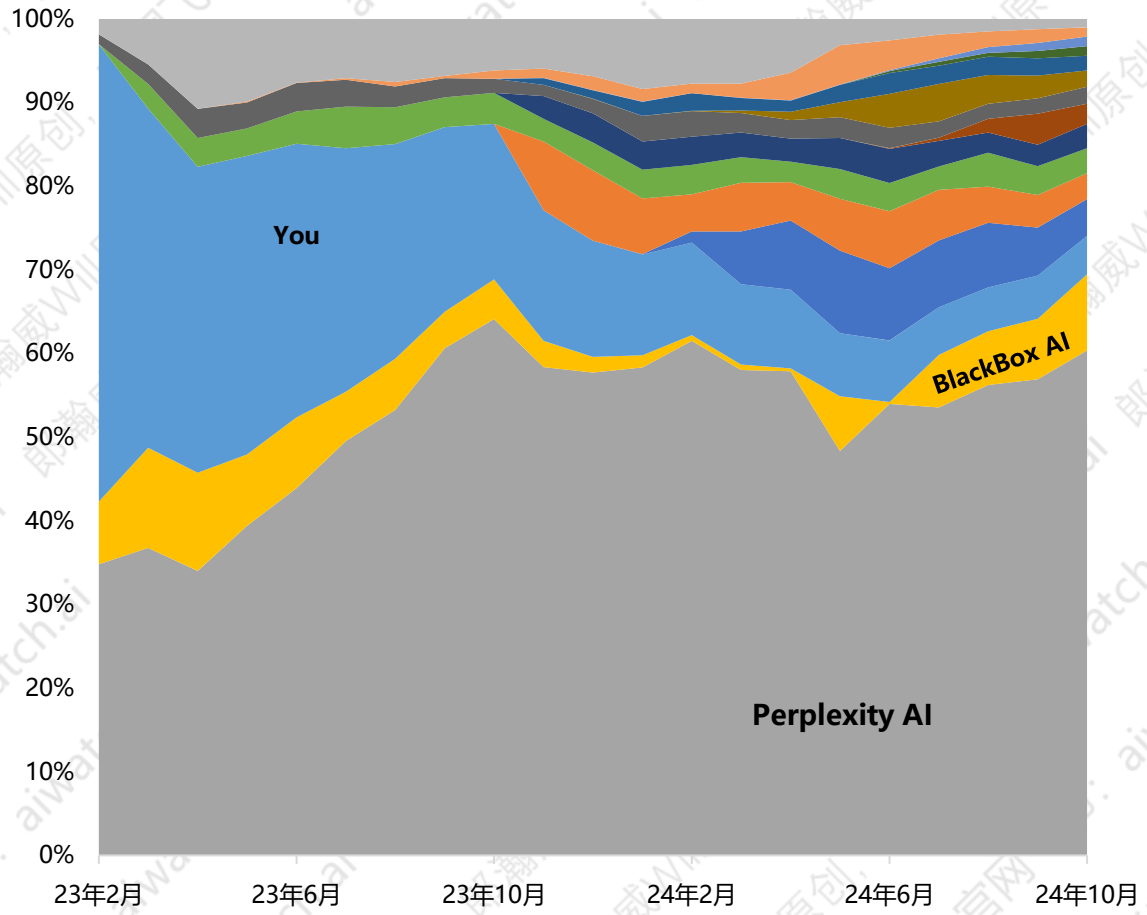


数据来源：similarweb　单位：万visit

AI搜索 2023.2~2024.10 网页流量占比

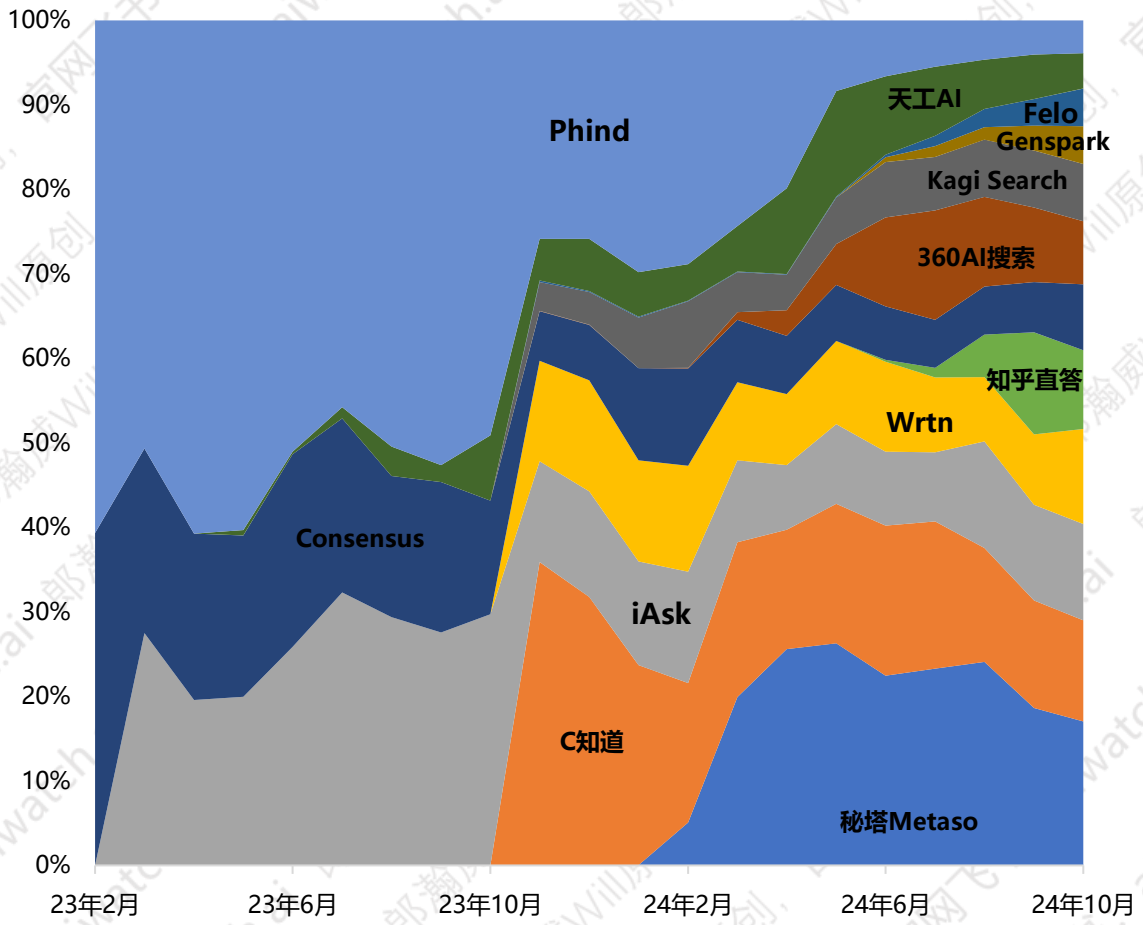
- Top15占比分析：Perplexity AI的市场份额持续上升，已占据主导地位；You份额虽有所下滑，但与BlackBox AI一起仍占据重要份额，头部玩家的竞争格局趋于稳定。

Top15占比



- 4-15名占比分析：中国玩家如秘塔Metaso、C知道快速崛起，逐步蚕食市场份额；同时新进入者如天工AI、Consensus等持续发力，展现出第二梯队的强劲竞争活力。

No.3-No.15占比



数据来源：similarweb 单位：万visit

AI搜索 - 国际/国产/出海 Top10

国际

- Perplexity AI一家独大(9078万访问)，其他产品差距明显

序号	产品名称	24年10月(万visit)
1	Perplexity AI	9,078
2	BlackBox AI	1,372
3	You	687
4	iAsk	445
5	Wrtn	439
6	Consensus	305
7	Kagi Search	264
8	Phind	151
9	Scite_	146
10	Andi	139

国产

- 秘塔Metaso领跑(665万访问)，多个产品竞相发展

序号	产品名称	24年10月(万visit)
1	秘塔Metaso	665
2	C知道	468
3	知乎直答	363
4	360AI搜索	290
5	天工AI	164
6	Devv AI	32
7	百小应	18
8	开搜AI	9
9	心流AI	5
10	百度搜索 AI助手	4

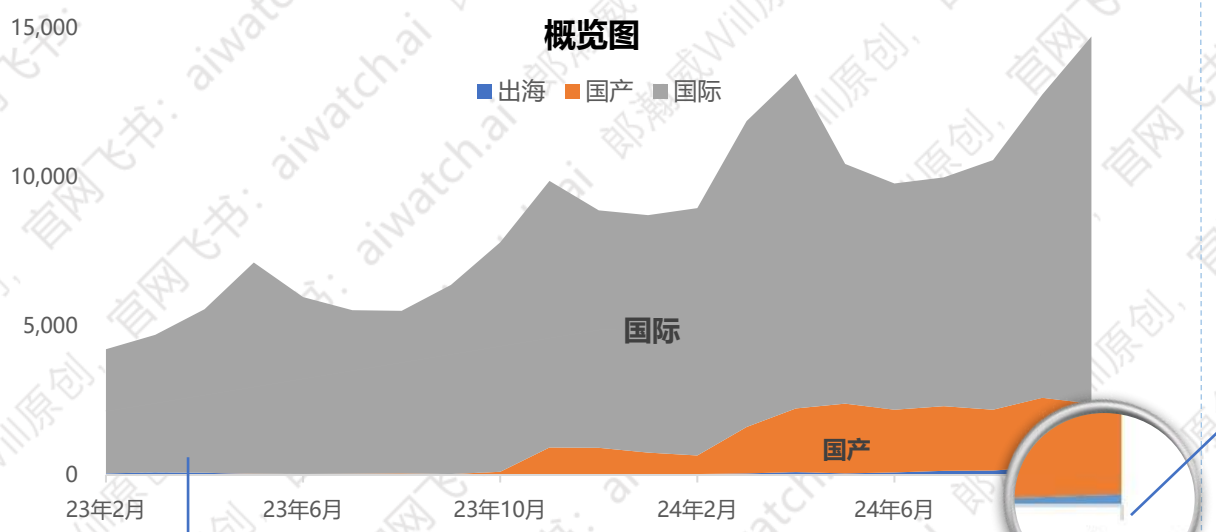
出海

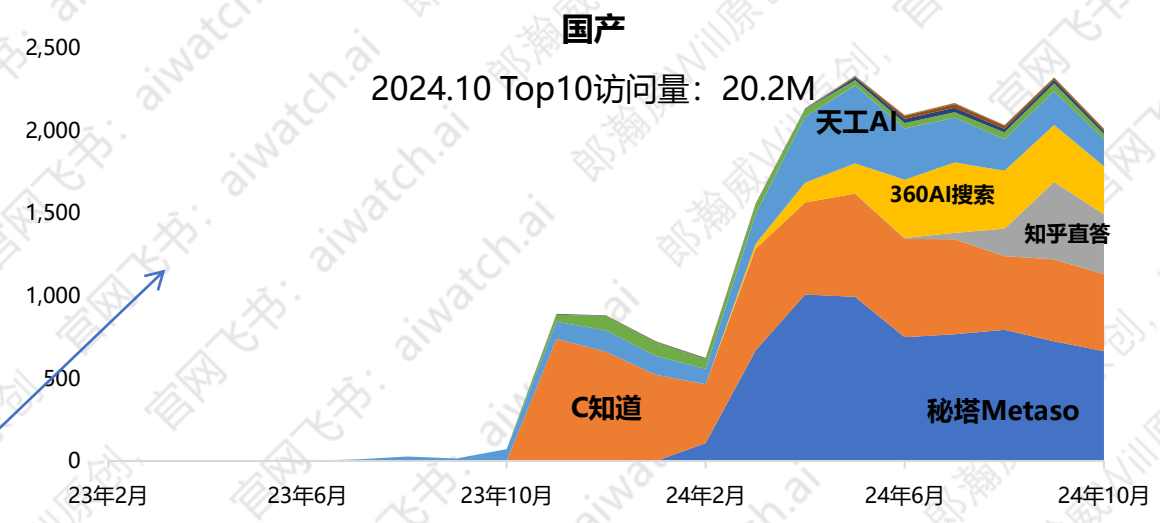
- Genspark(175万访问)、Felo(174万访问)并驾齐驱，但规模有限

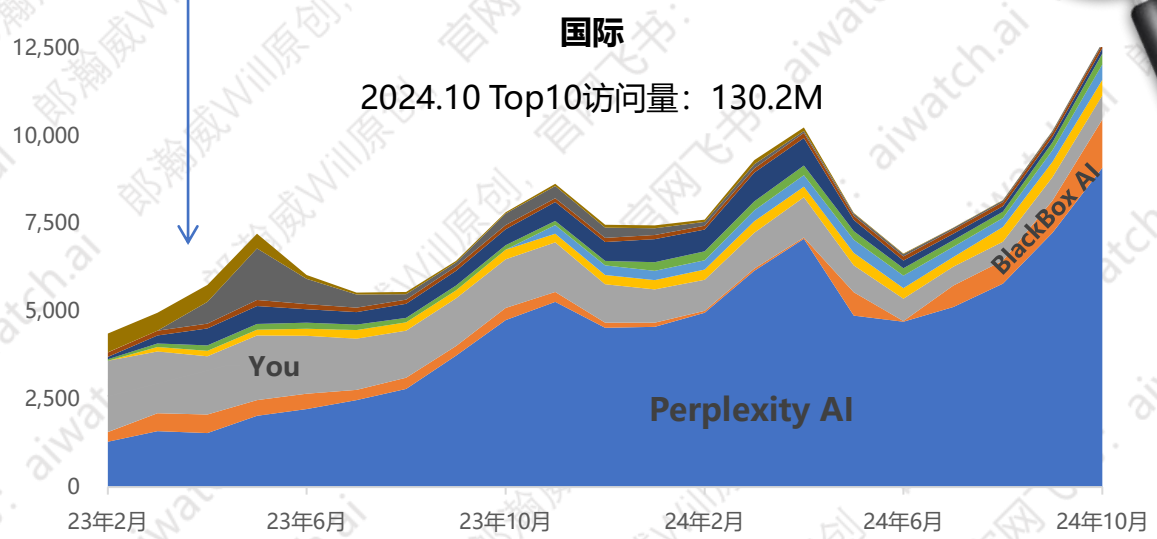
序号	产品名称	24年10月(万visit)
1	Genspark	175
2	Felo	174
3	Komo Search	15
4	ThinkAny	7
5	Lepton Search	3
6	Brainstorm.cool	-
7	AwesomeGPTs	-
8	GPTs Today	-

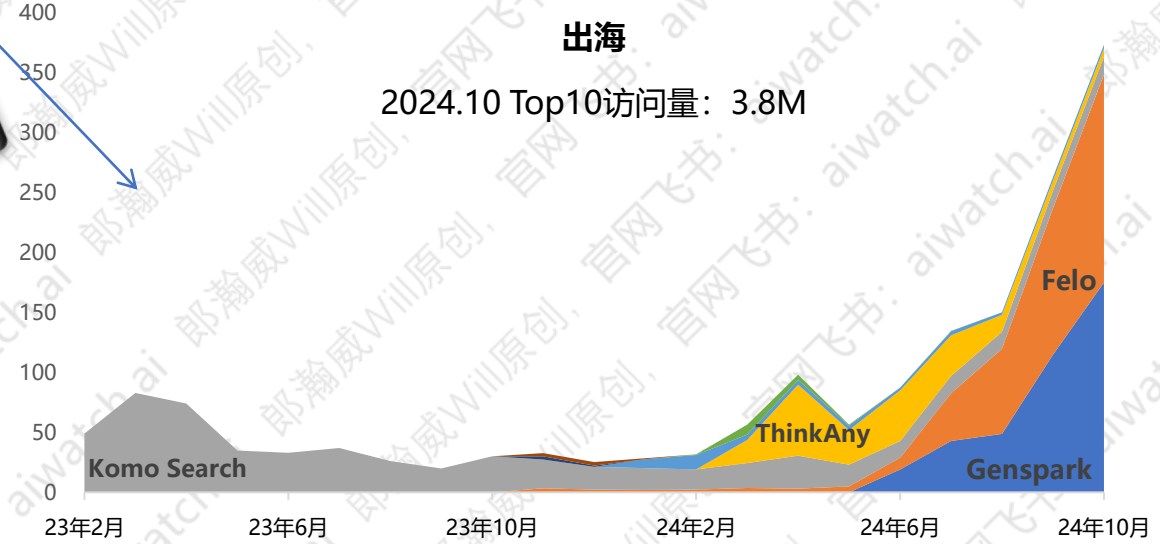
数据来源：similarweb 单位：万visit

AI搜索 国际 88% | 国产 11% | 出海 1%



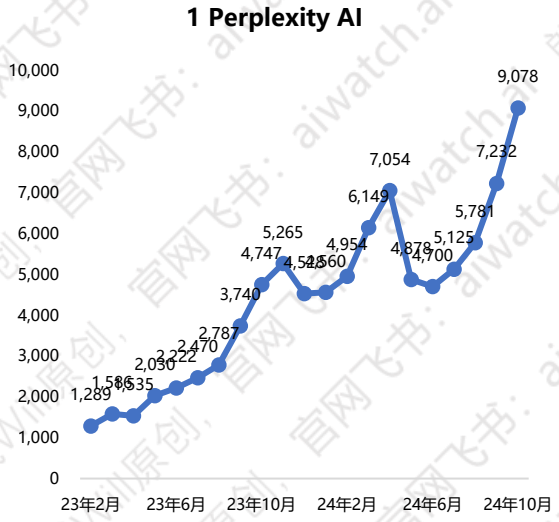


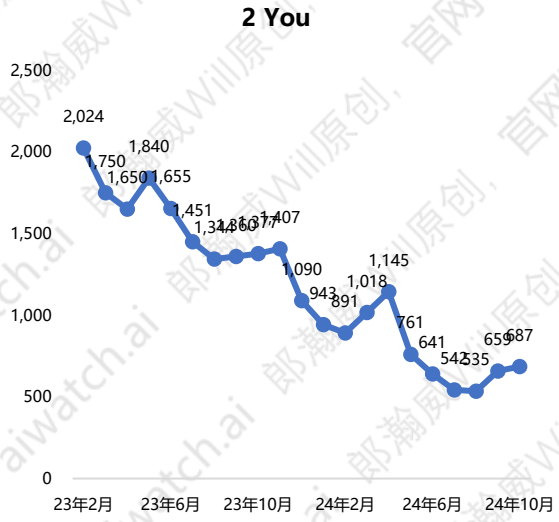


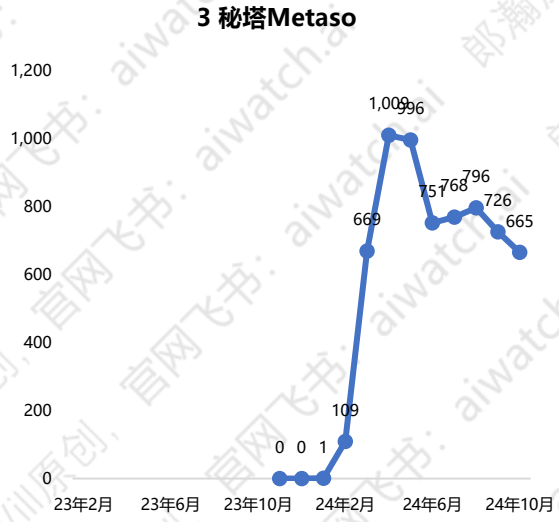


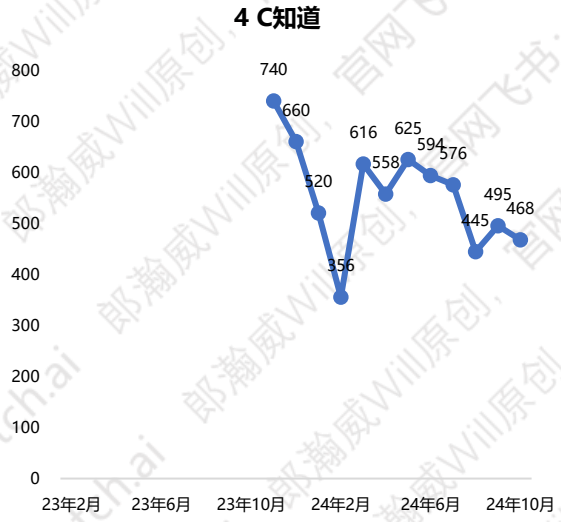
数据来源：similarweb 单位：万visit

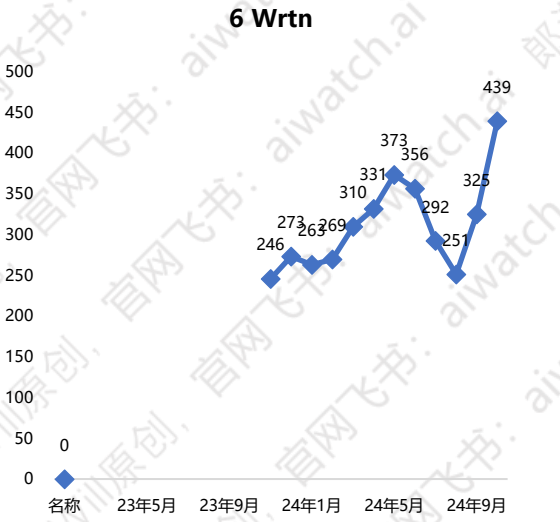
AI搜索 No.1-No.8

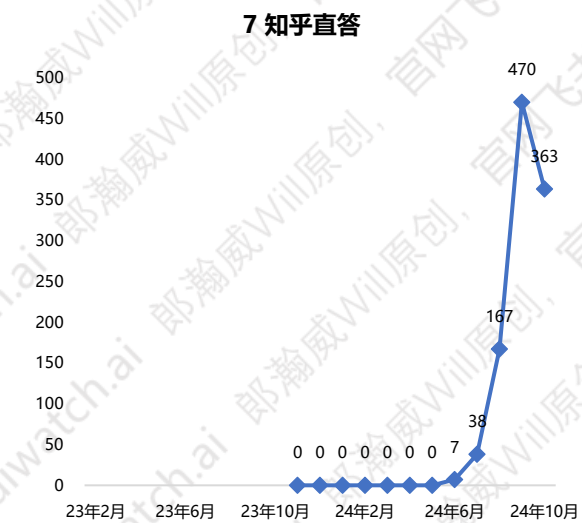


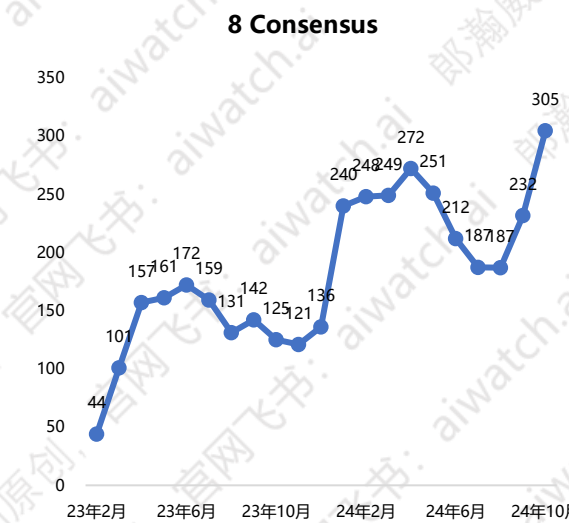








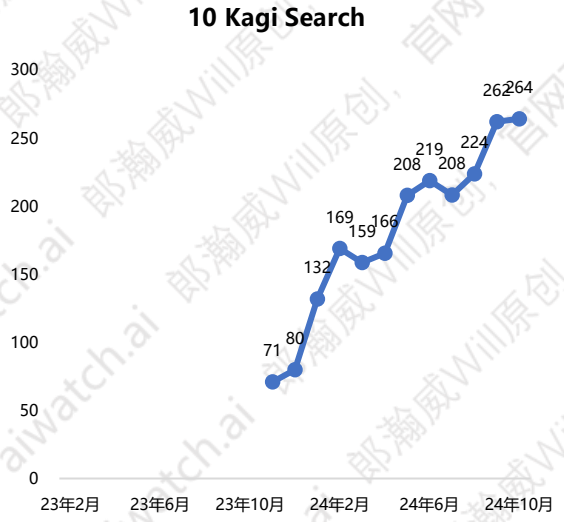


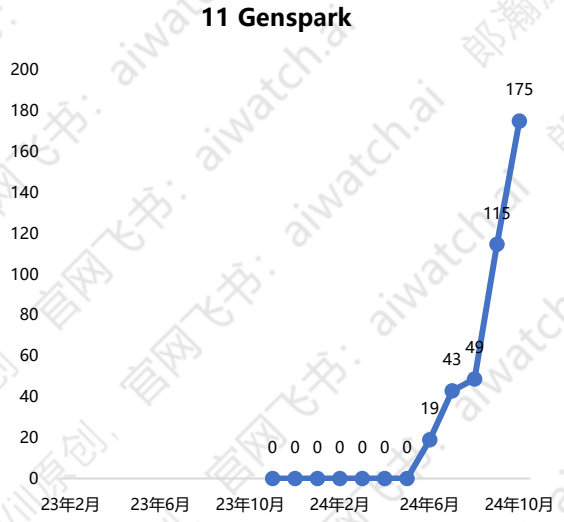


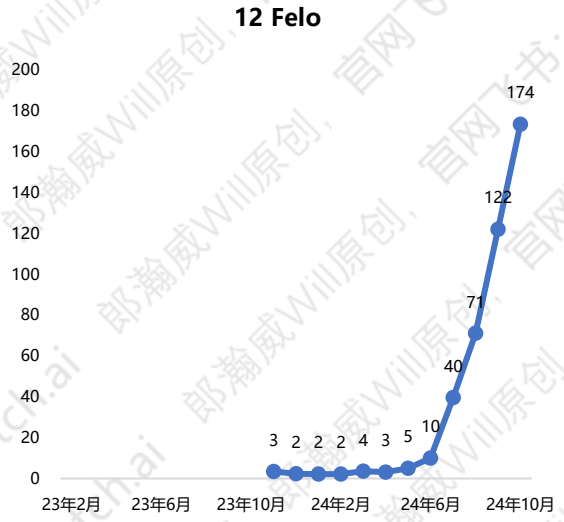
数据来源：similarweb 单位：万visit

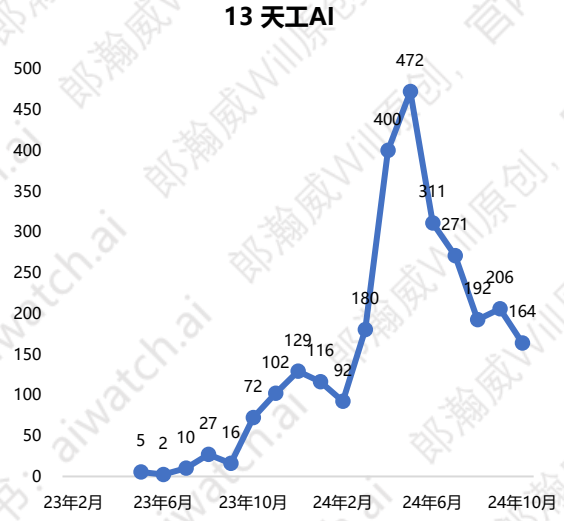
aiwatch.ai 郎瀚威Will原创 官网飞书

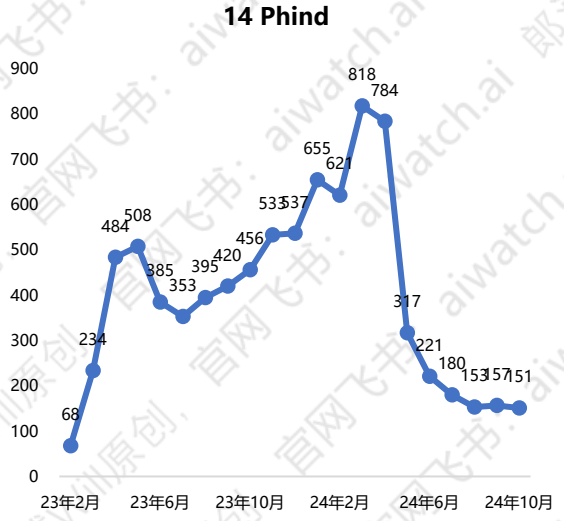
AI搜索 No.9-No.16

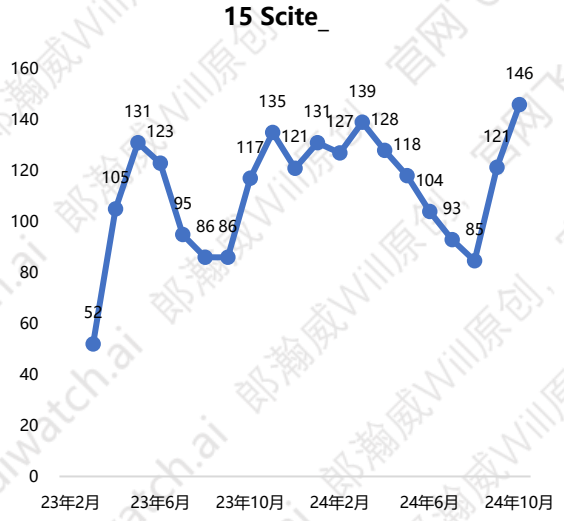


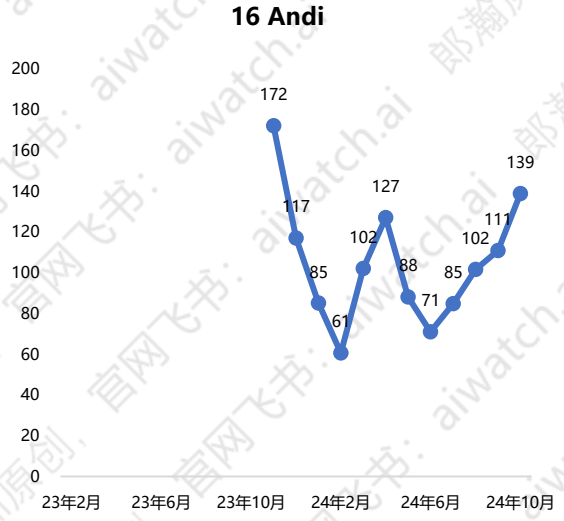








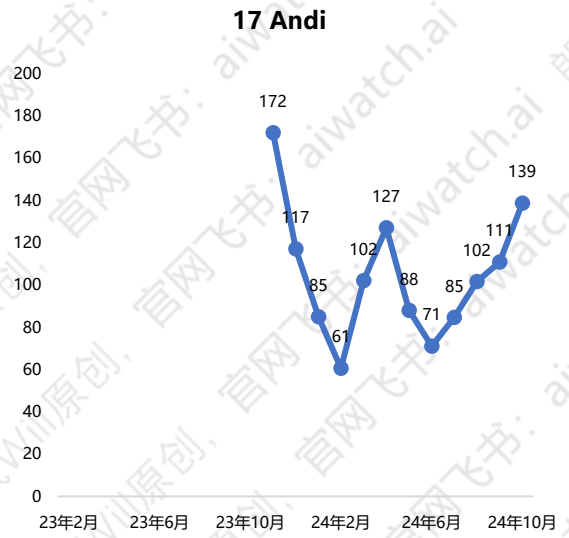


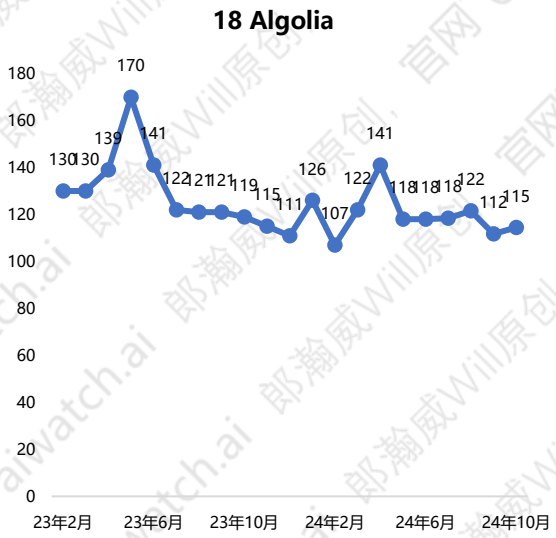


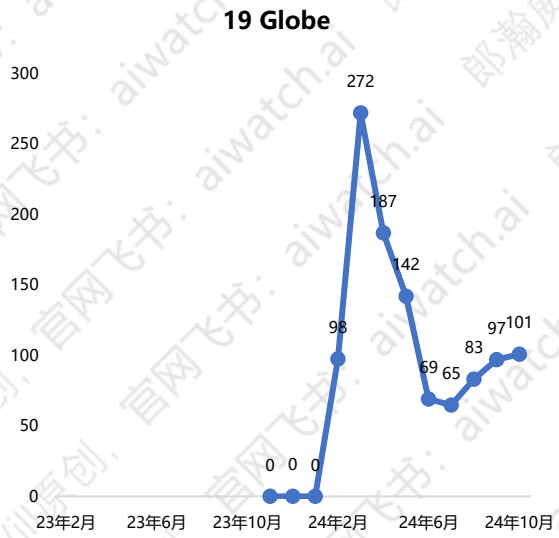
数据来源：similarweb 单位：万visit

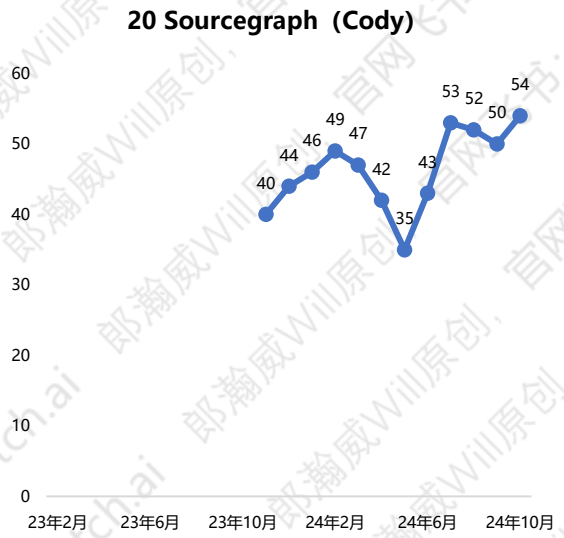
官网飞书：aiwatch.ai 郎瀚威Will原创

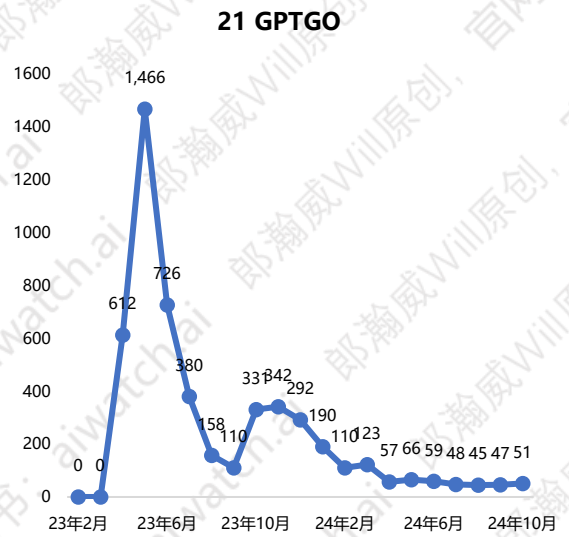
AI搜索 No.17-No.24

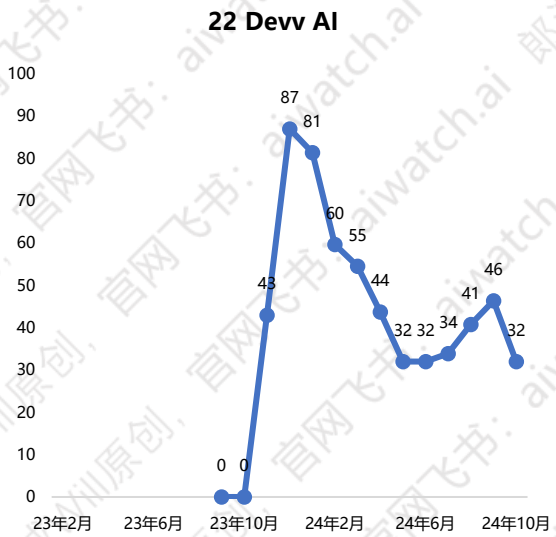


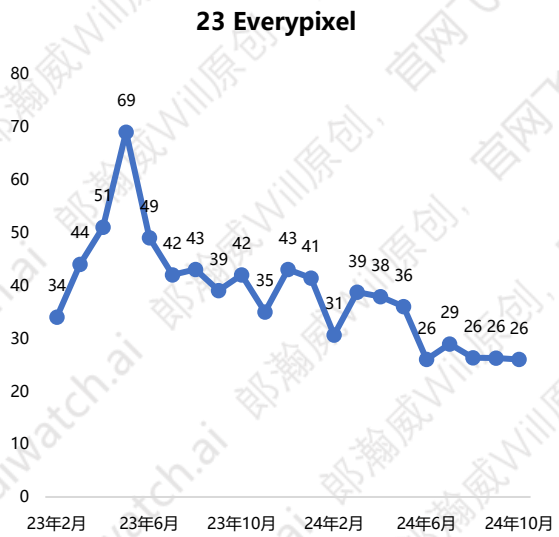


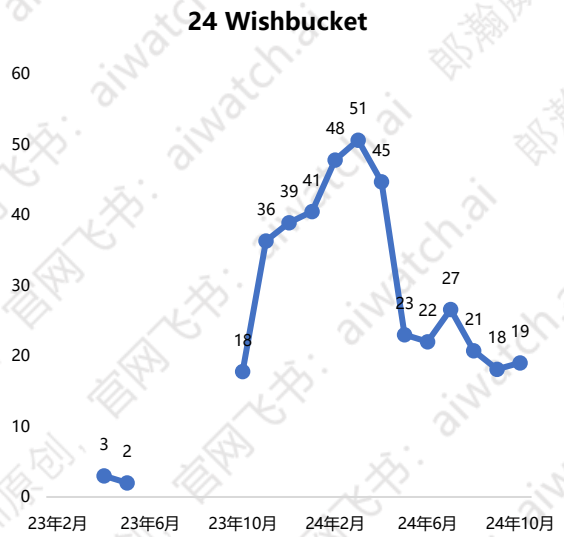






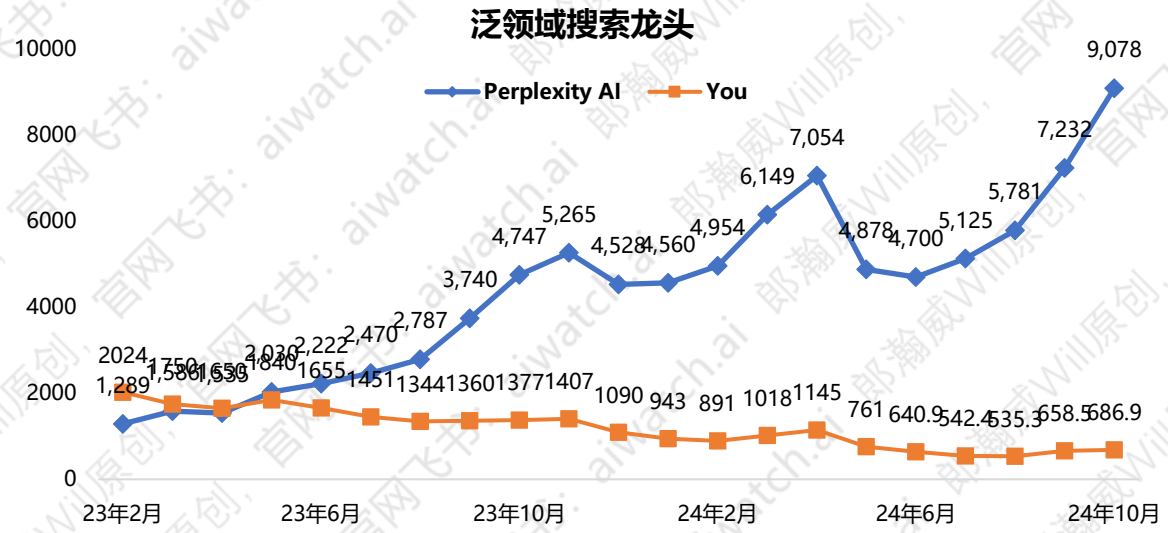


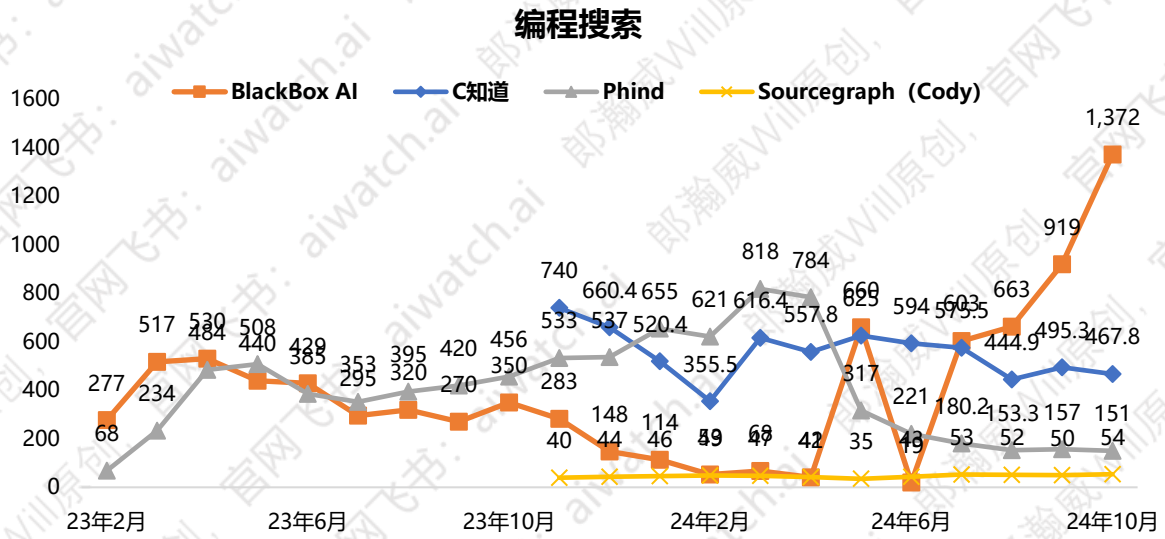


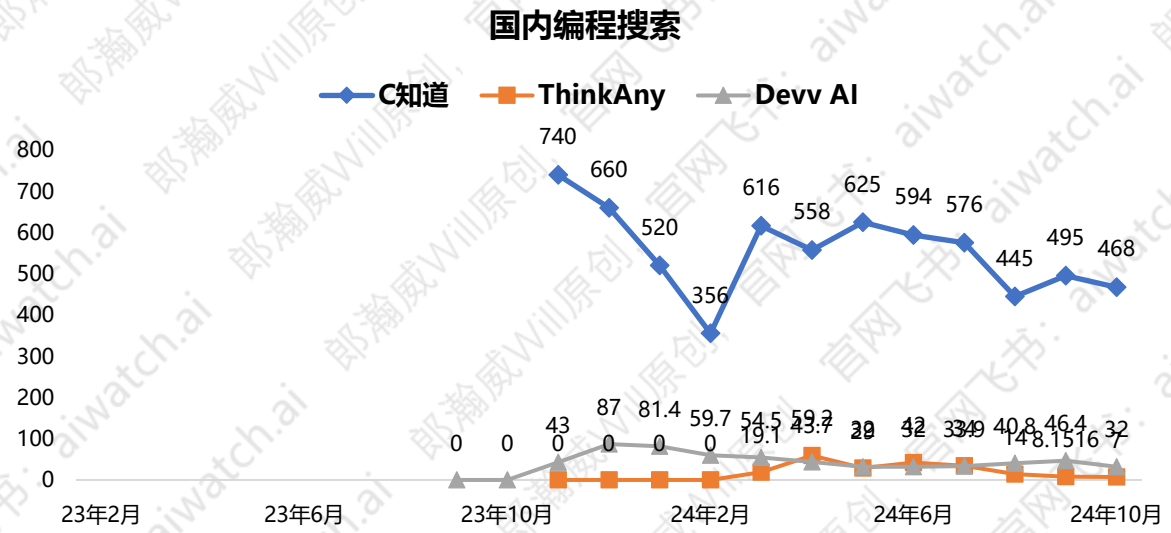


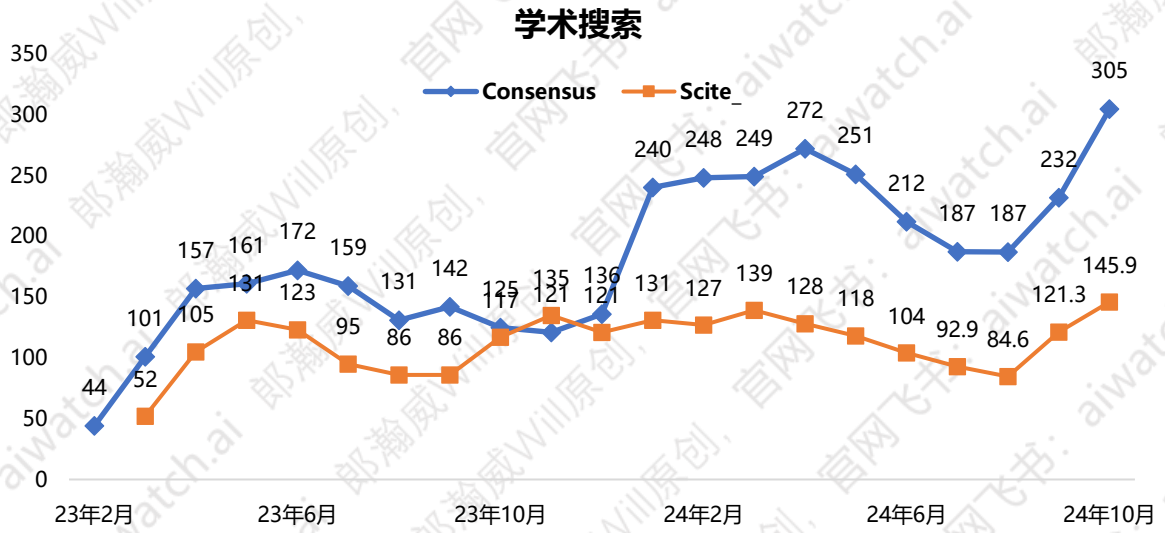
数据来源：similarweb 单位：万visit

AI搜索 复合图表









数据来源：similarweb 单位：万visit

AI浏览器

AI浏览器（官网流量）

AI浏览器 – Takeaway

1. 2024年10月AI浏览器赛道TOP15总访问量达22.3亿次。
2. 行业第一梯队由New Bing、Brave和Opera组成，月访问量分别达18.08亿、2.61亿和0.87亿次，New Bing一家独大。
3. 从增速看，New Bing同比增长39%，市场份额持续扩大，显示出微软在AI浏览器领域的主导地位。
4. 融资方面，Opera和Arc浏览器分别完成了8400万美元的Post-IPO融资和5000万美元的B轮融资。
5. 中国本土浏览器表现抢眼，夸克浏览器以7248万月访问量位居第四，本土市场占有率达95%，而360AI浏览器也进入前十。
6. 值得注意的是，市场呈现明显的头部效应，前三名占据了总流量的96%以上，而新进入者如Pinokio、Wavebox等访问量仍相对较小。

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

AI浏览器官网流量 - Top10

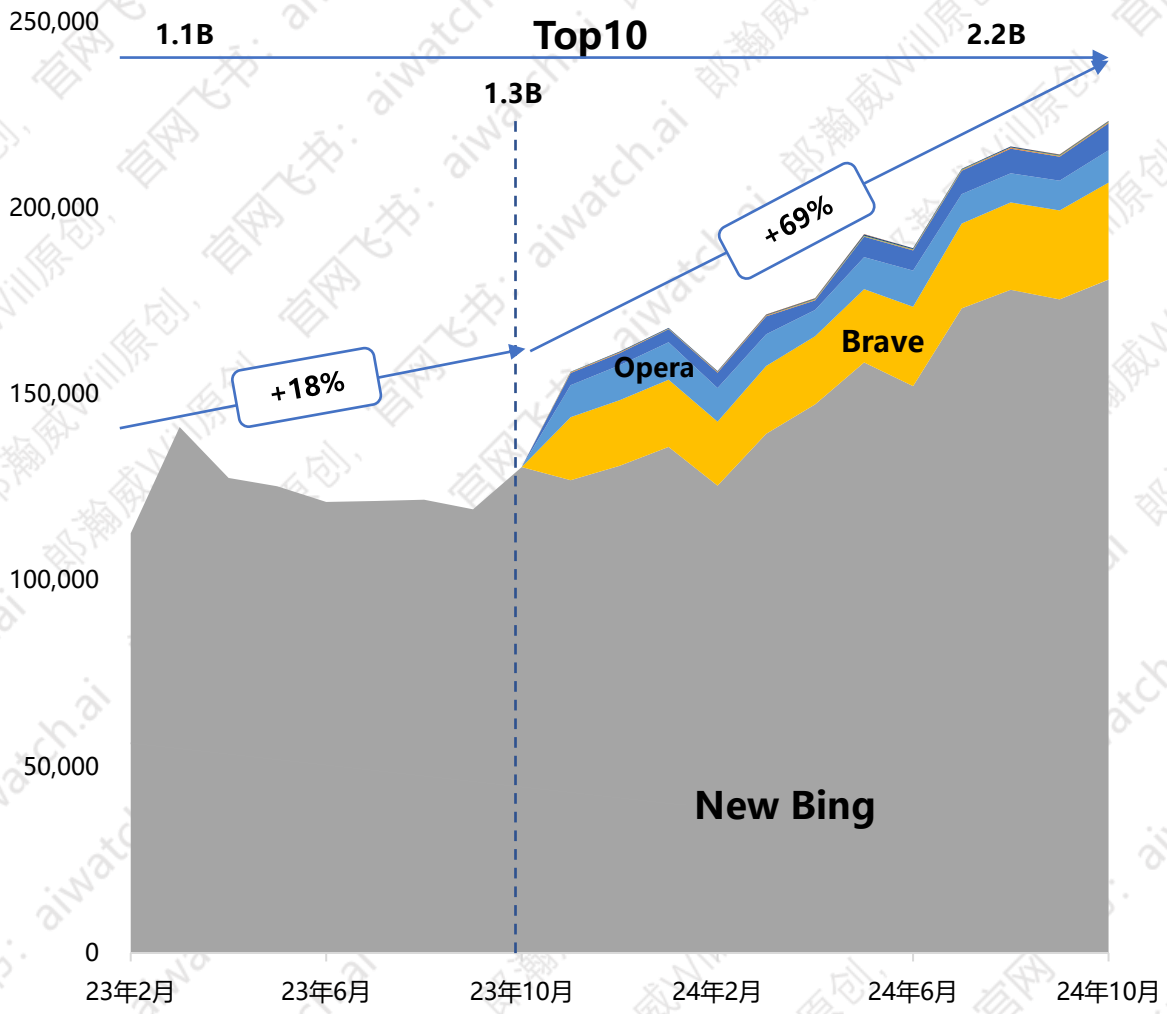
- **TOP15总融资额：5000万美元** (Arc浏览器 (The Browser Company 50M$)=50M$)
- **Top15 总网页流量：22.3亿次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	New Bing	130,500	180,800	39%	Microsoft	-	-	-	-	China	25%
2	Brave		26,100	-	Brave	-	-	-	-	United States	30%
3	Opera		8,670	-	Opera	-	-	-	-	Brazil	10%
4	夸克		7,248	-	UC浏览器	-	-	-	-	China	95%
5	VIVALDI		200	-	VIVALDI	-	-	-	-	United States	16%
6	360AI浏览器		187	-	360	-	-	-	-	China	97%
7	Arc浏览器		168	-	Browser	B轮	2024/3/21	50	-	United States	18%
8	Pinokio		44	-	Pinokio	-	-	-	-	United States	12%
9	Wavebox		8	-	Wavebox	-	-	-	-	United States	16%
10	TabTac		-	-	TabTac	-	-	-	-	-	-

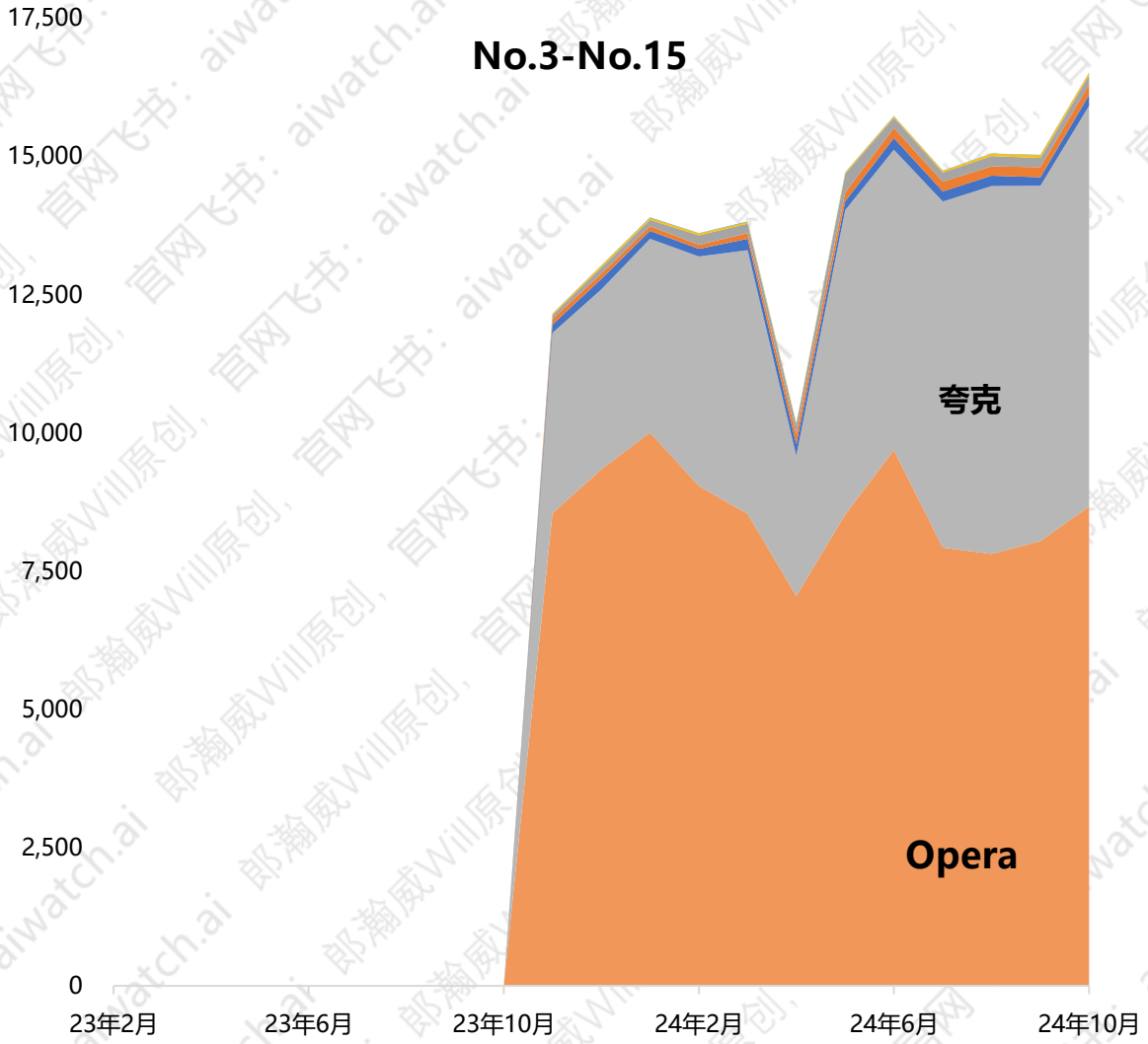
数据来源：similarweb 单位：万visit

AI浏览器　网页流量趋势 10月总量：22.3亿

- New Bing处于绝对主导地位，Brave作为第二大平台保持稳定增长，市场份额在10-15%之间波动。



- Opera和夸克构成稳定的第二梯队，月访问量均在7000-9000万次区间，两者在各自目标市场具有显著优势。而其他产品差距较大，访问量普遍在200万次以下。

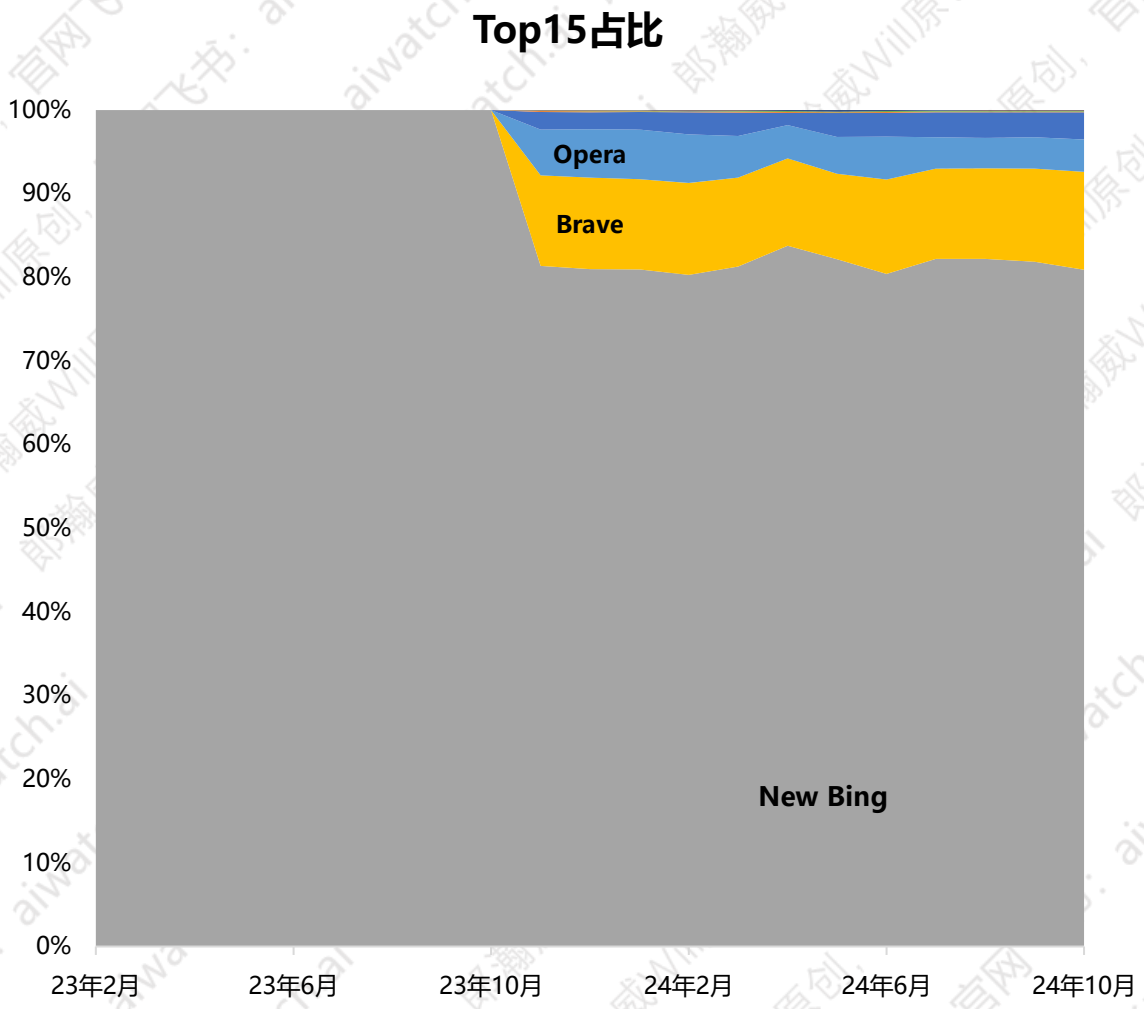


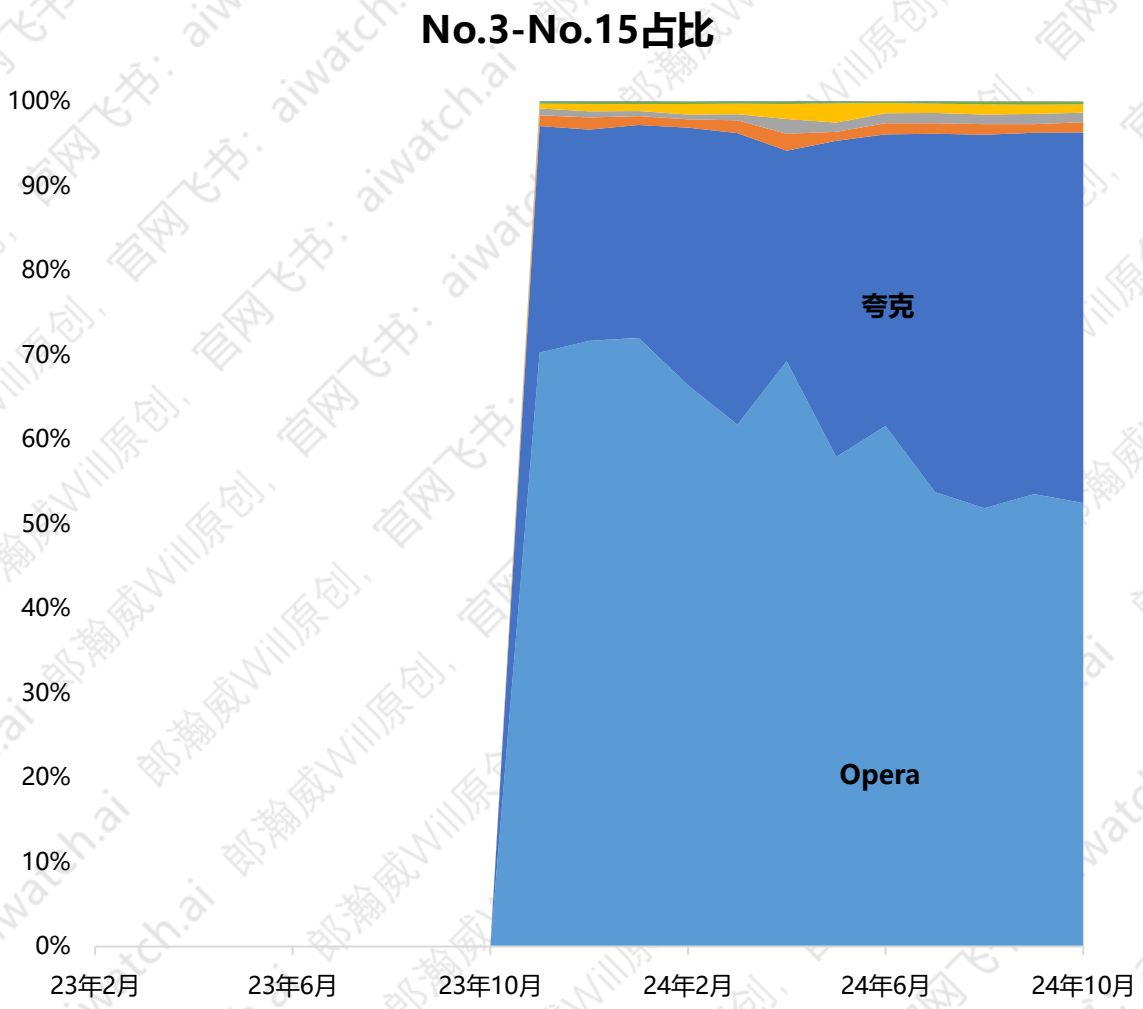
数据来源：similarweb　单位：万visit

AI浏览器 2023.2~2024.10 网页流量占比

- 从整体占比看，New Bing的市场份额持续保持在80%以上，处于绝对垄断地位。Brave占据约12%的市场份额，Opera份额相对稳定在5%左右。

- 在No.3-No.10梯队中，Opera和夸克占据主要份额，合计约占8%的市场。其他产品如VIVALDI、Arc浏览器等份额较小，合计不足2%。





数据来源：similarweb 单位：万visit

AI浏览器 - 国际/国产/出海 Top10

国际

- New Bing月访问量180800万次，一家独大。

序号	产品名称	24年10月 (万visit)
1	New Bing	180,800
2	Brave	26,100
3	Opera	8,670
4	VIVALDI	200
5	Arc浏览器	168
6	Pinokio	44
7	Wavebox	8
8	TabTac	-

国产

- 夸克浏览器访问量7248万次，本土优势明显。

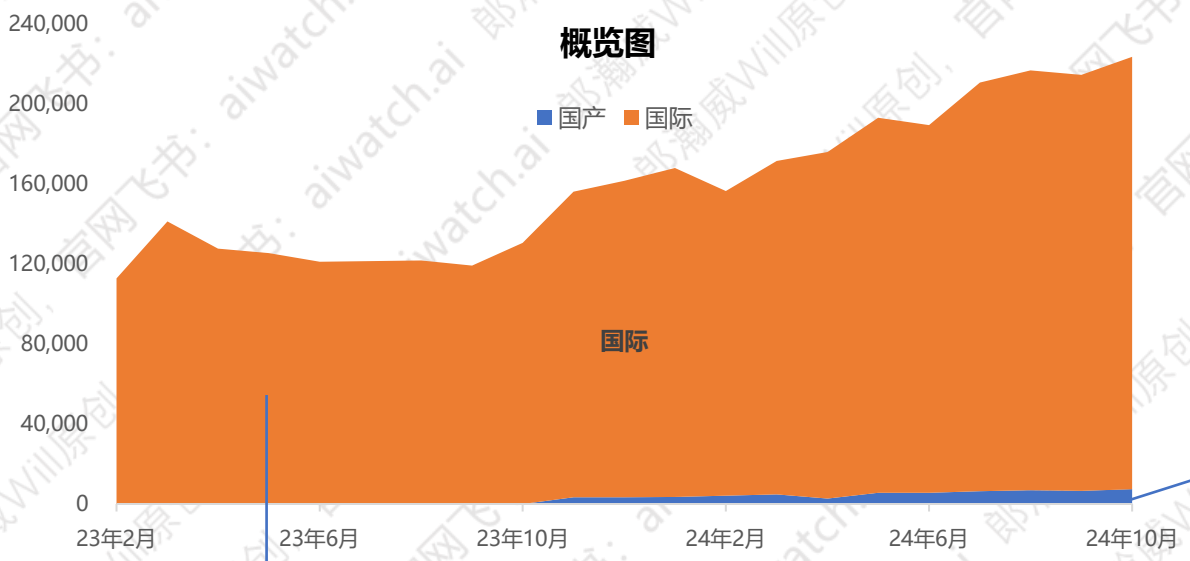
序号	产品名称	24年10月 (万visit)
1	夸克	7,248
2	360AI浏览器	187

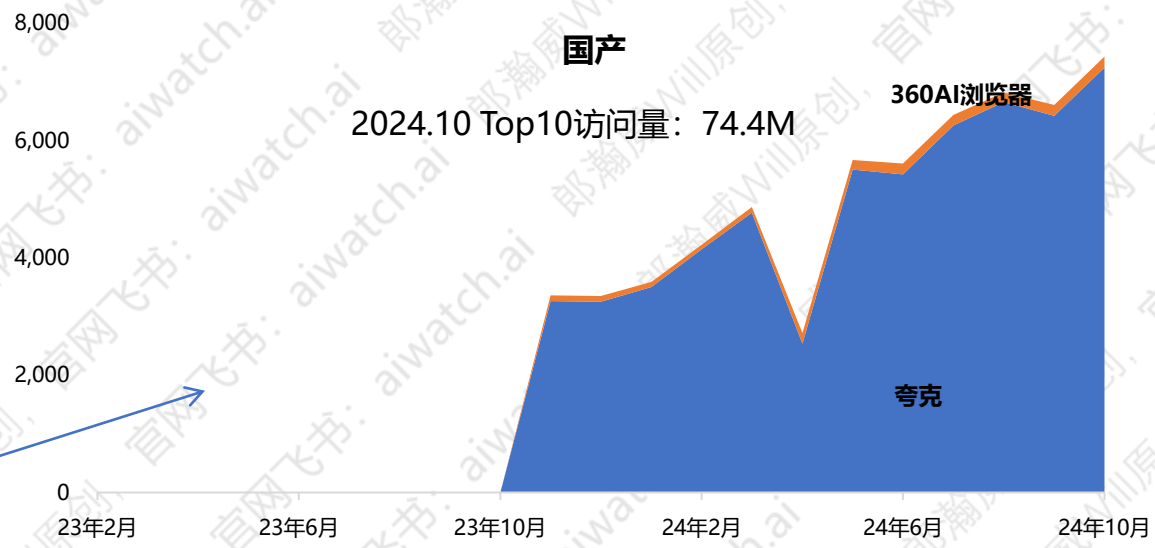
出海

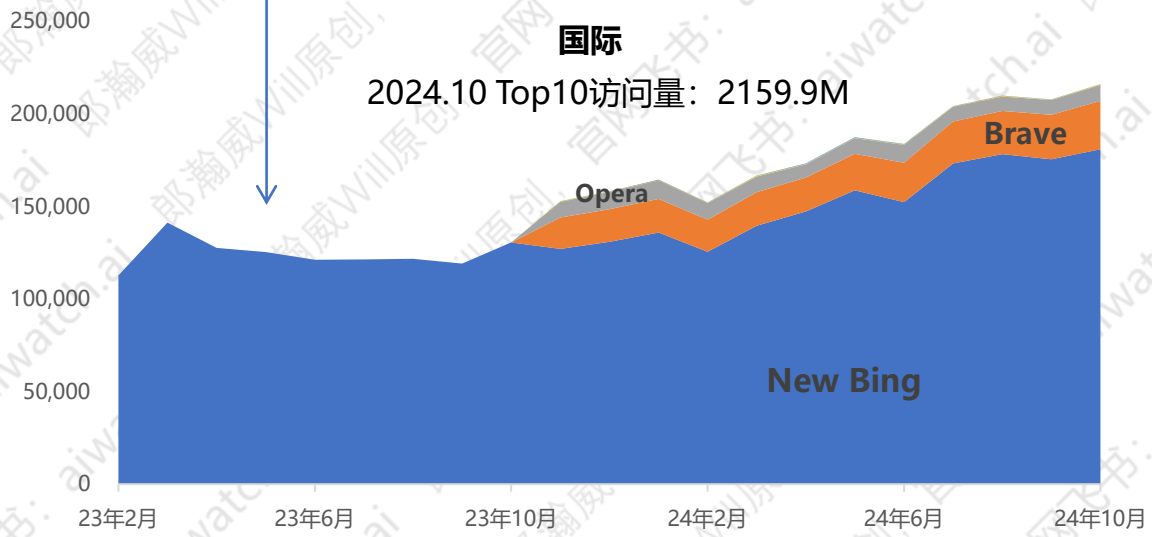
- 无数据

数据来源：similarweb 单位：万visit

AI浏览器 国际 98% | 国产 2%

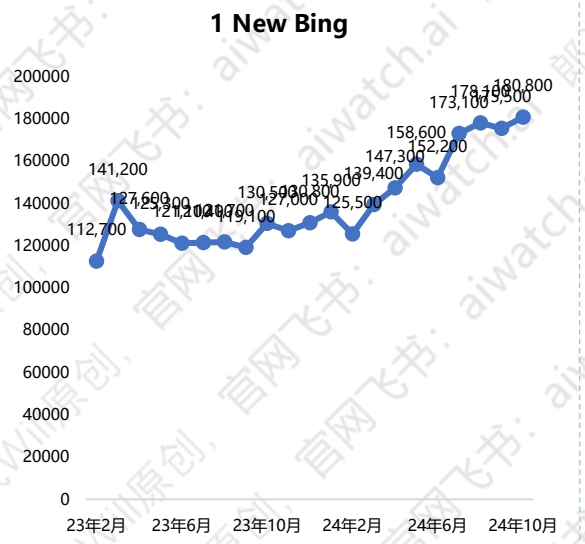


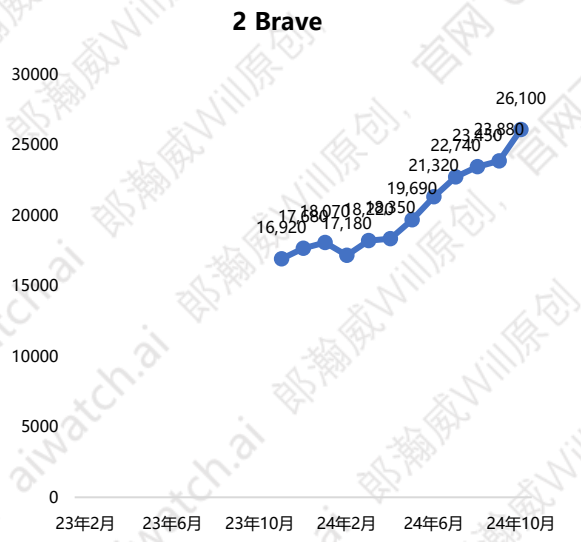


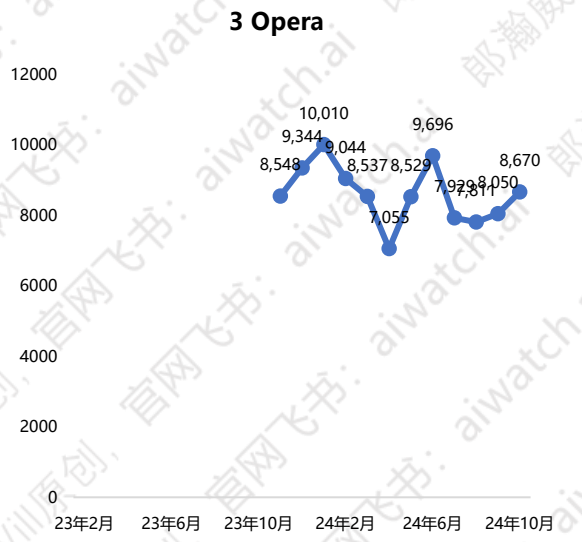


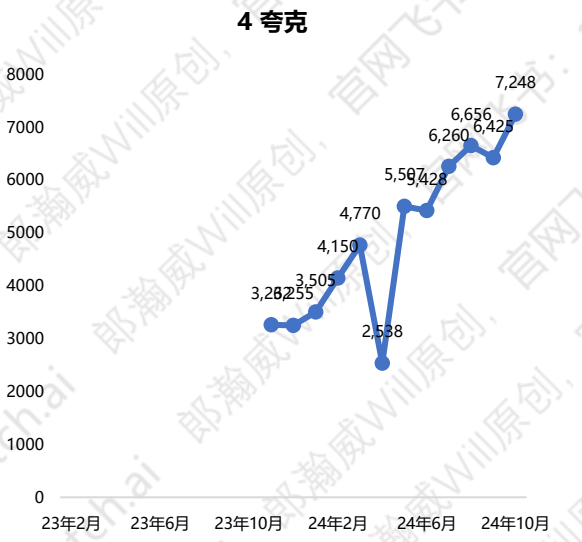
数据来源：similarweb 单位：万visit

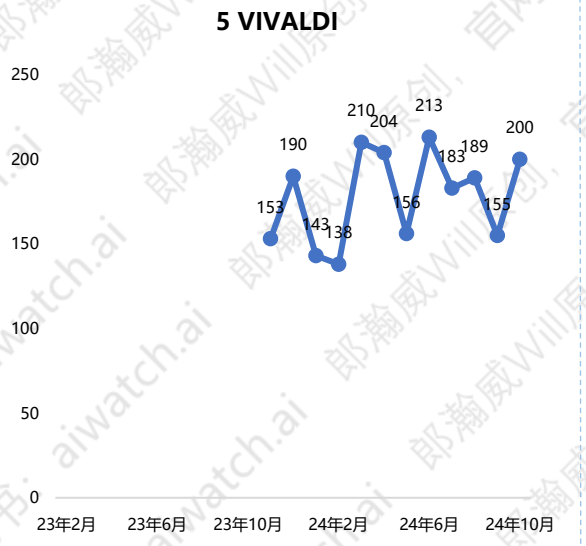
AI浏览器 No.1-No.8

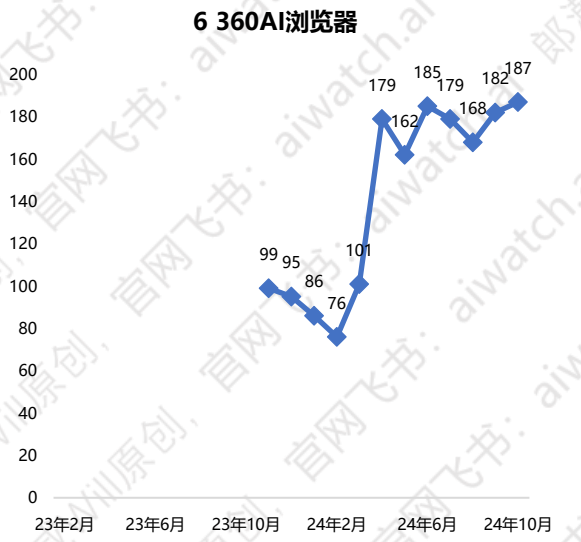


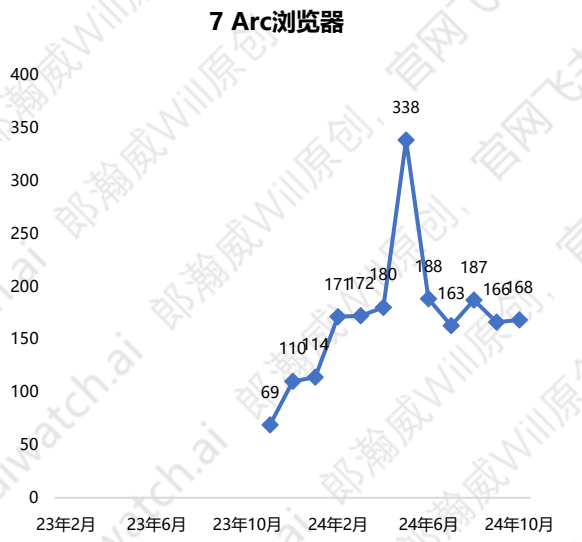


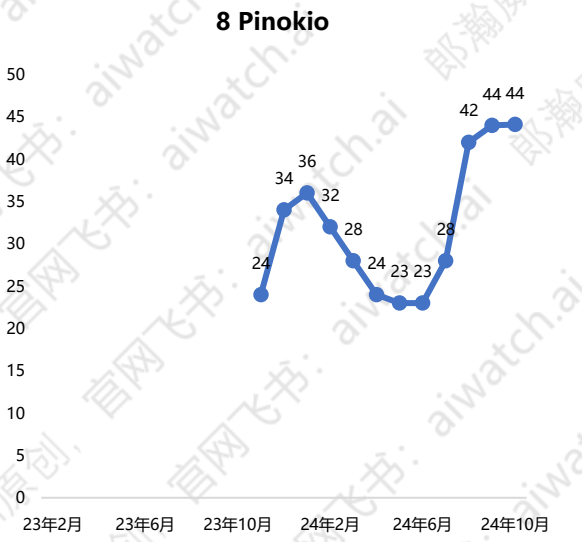












数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

虚拟角色

虚拟角色

虚拟角色 – Takeaway

1. 2024年10月虚拟角色赛道TOP15总访问量达到3.4亿次访问，环比持续增长。
2. Character.AI、JanitorAI和SpicyChat AI稳居前三，分别达到1871万、582万和324万次访问。
3. 从增速来看，Candy.ai、JanitorAI和CHAI表现亮眼，同比增长分别达到392%、336%和778%。
4. 在融资方面，Pi（Inflection AI）、Talkie（Minimax）和Character.AI的融资规模居前，分别获得13亿美元、6亿美元和1.5亿美元投资。
5. 从赛道格局来看，国际产品占据主导地位，其中美国产品占比最大，但国产玩家如FurryBar、小冰虚拟等也在积极布局。
6. 值得关注的是，在出海赛道上，Crush On、Talkie和Joyland表现突出，显示了中国企业在全球市场的竞争力。

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

虚拟角色 - Top15

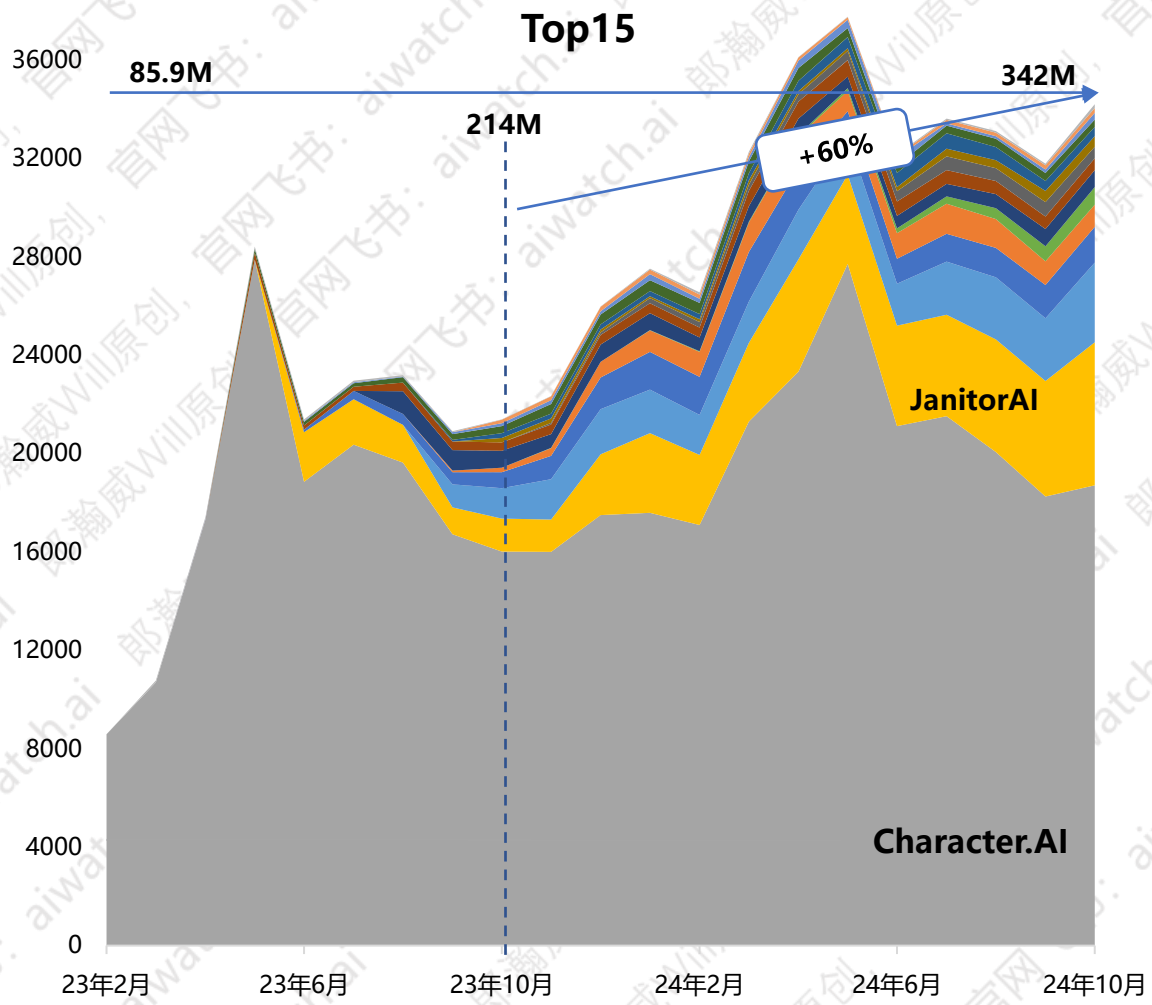
- **TOP15 总融资额：20.8亿美元** (Character.AI (Character.AI 150M$)+Talkie (Minimax 600M$)+Pi (Inflection AI 1300M$)+FlowGPT (FloWGPT 10M$)+MyShell (MyShell 11M$)+CHAI (CHAI 8M$)=2079M$)
- **Top15 总网页流量：3.4亿次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Character.AI	16,020	18,710	17%	Character.AI	A轮	2023年3月23	150	-	United States	32%
2	JanitorAI	1,335	5,816	336%	JanitorAI	-	-	-	-	United States	41%
3	SpicyChat AI	1,247	3,237	160%	SpicyChat AI	-	-	-	-	United States	23%
4	Crush On	650	1,459	124%	CrushOn	-	-	-	-	United States	32%
5	Candy.ai	184	905	392%	Candy.ai	-	-	-	-	United States	25%
6	Talkie		714	-	Minimax	B轮	2024/3/5	600	-	United States	51%
7	Chub	688	691	0%	Chub	-	-	-	-	United States	29%
8	Pi	330	483	46%	Inflection AI	Venture	2023/6/29	1300	-	United States	39%
9	GPTGirlfriend		469	-	GPTGirlfriend	-	-	-	0.5	United States	27%
10	Joyland	190	422	122%	西湖心辰	-	-	-	-	United States	43%
11	Pephop	189	380	101%	Pephop	-	-	-	-	United States	20%
12	FlowGPT	283	300	6%	FloWGPT	种子轮	2024/2/26	10	-	United States	24%
13	MyShell	120	278	132%	MyShell inc	种子轮	2024/3/27	11	-	United States	15%
14	Muah.AI	145	183	26%	Muah.AI	-	-	-	-	United States	36%
15	CHAI	18	158	778%	CHAI	Corporate Round	2023/9/24	8	-	United States	24%

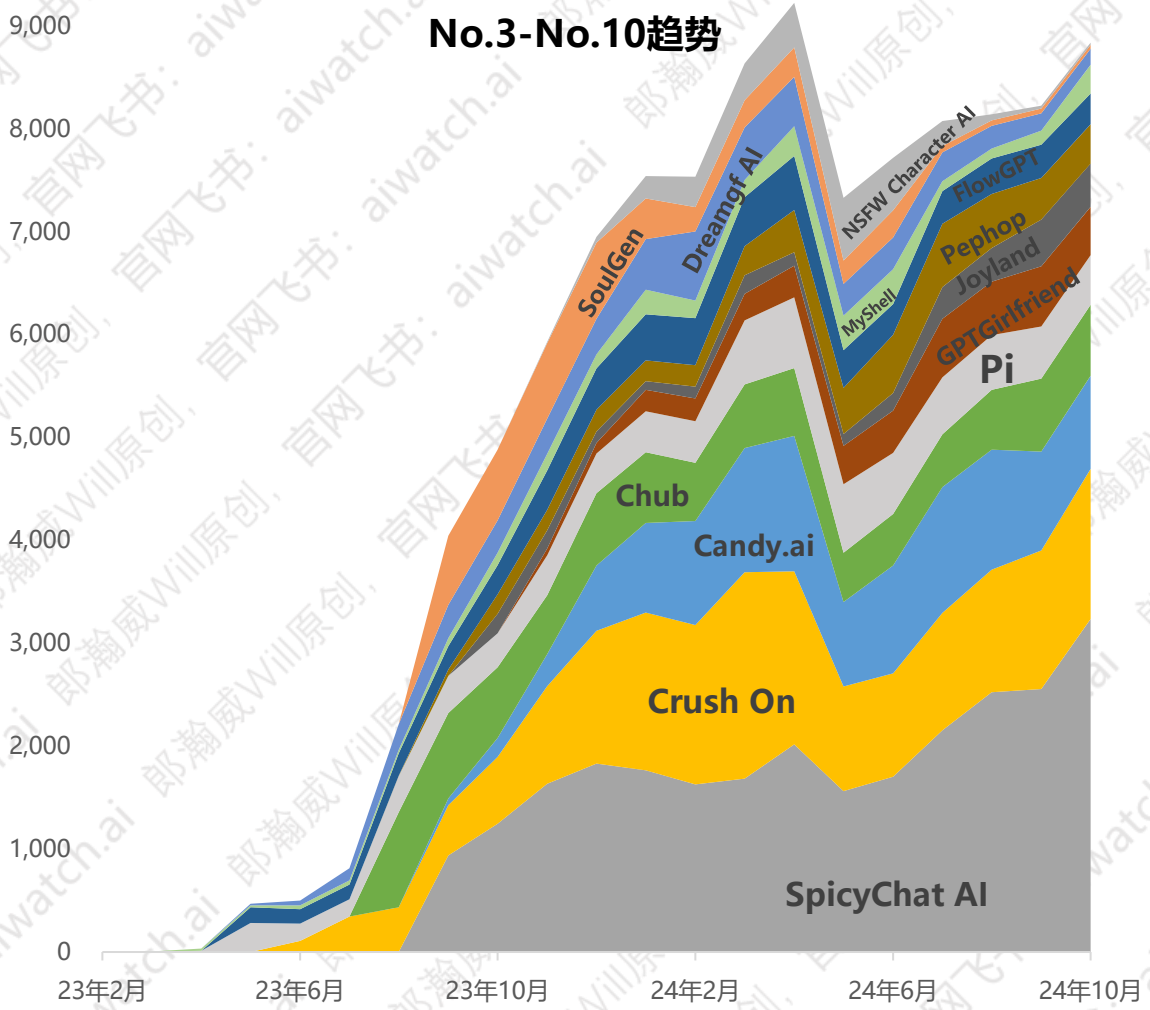
数据来源：similarweb 单位：万visit

虚拟角色　网页流量趋势 10月总量：3.4亿

- Character.AI月访问量1.87亿，同比增长17%，稳居第一，展现出强大的市场统治力，JanitorAI访问量达581.6万，同比暴增336%，跃居第二，成为最大黑马



- SpicyChat AI(323.7万访问，增长160%)、Crush On(145.9万访问，增长124%)等第二梯队竞争激烈，差距逐渐拉大，中小型玩家如Candy.ai(90.5万访问，增长392%)、Chub(69.1万访问)等呈现差异化发展，各具特色

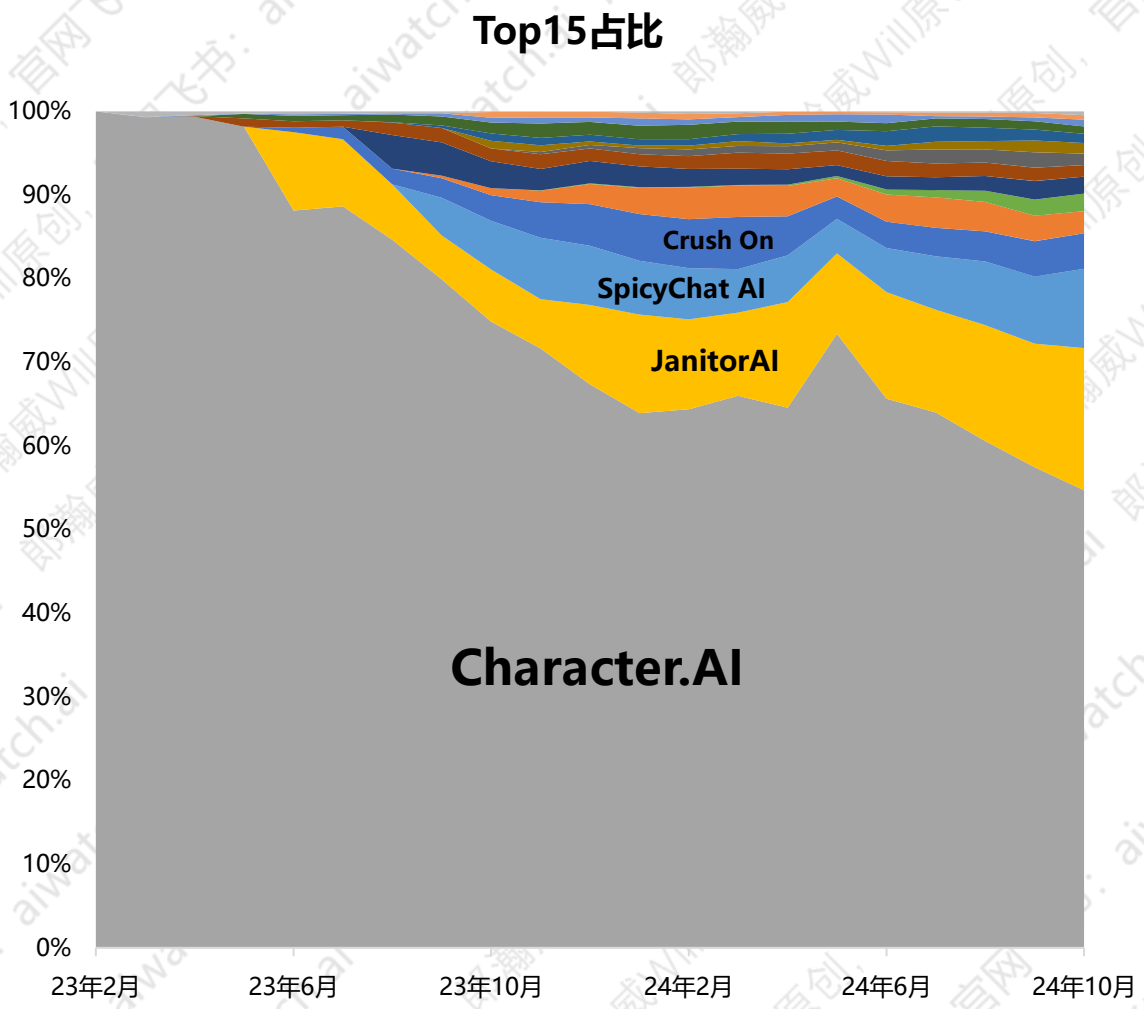


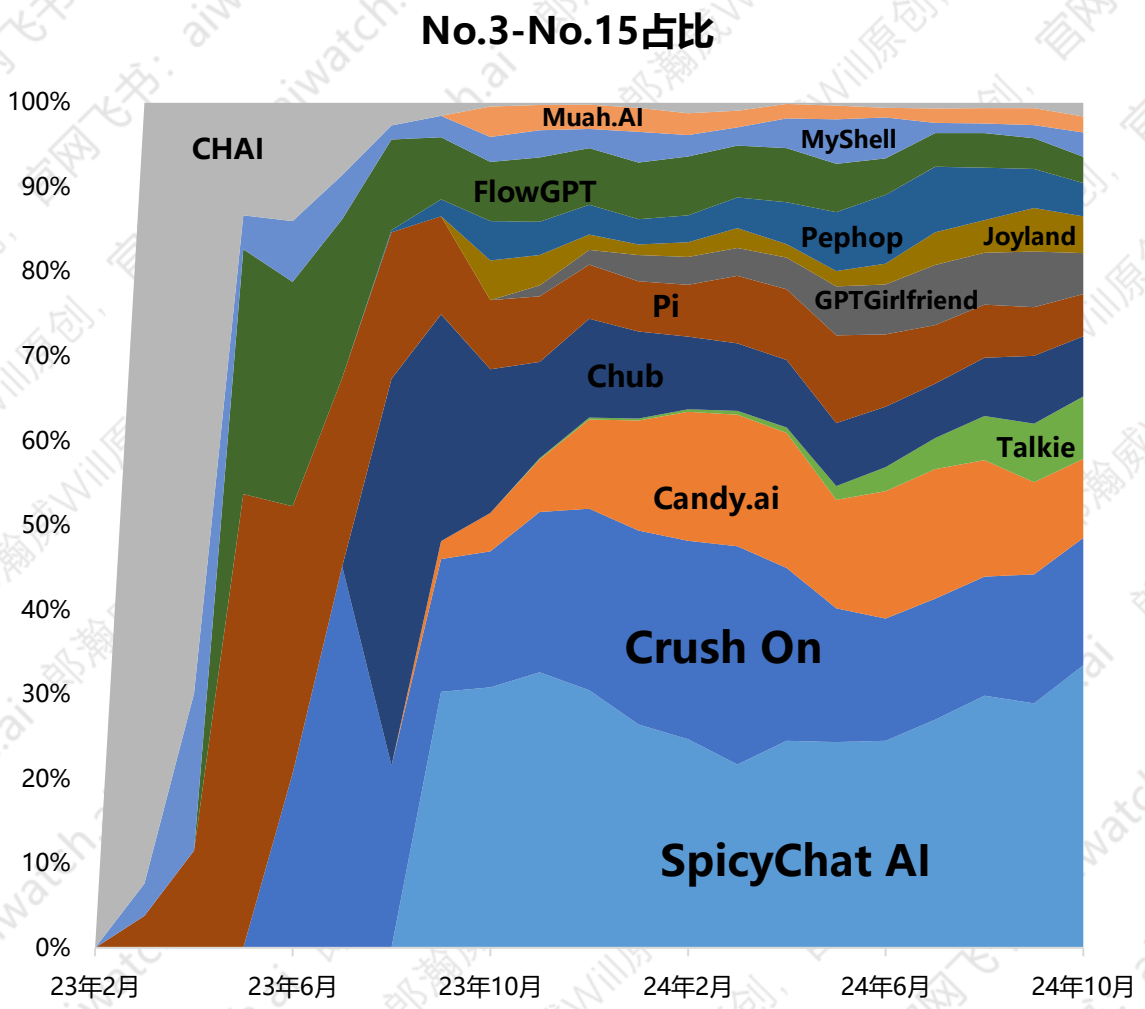
数据来源：similarweb 单位：万visit

虚拟角色 2023.2~2024.10 网页流量占比

- Character.AI份额从23年2月的近90%下降至24年10月的约55%，但仍占主导地位，其他玩家份额逐月攀升，市场集中度持续下降，竞争更趋激烈

- SpicyChat AI的份额从约10%提升至25%，稳居第二梯队领先地位，Crush On、Candy.ai等玩家份额波动明显，市场竞争日趋白热化





数据来源：similarweb 单位：万visit

虚拟角色 国际 | 国产 | 出海 Top10

国际

- Character.AI以18,710万访问量独占鳌头

序号	产品名称	24年10月(万visit)
1	Character.AI	18,710
2	JanitorAI	5,816
3	SpicyChat AI	3,237
4	Candy.ai	905
5	Chub	691
6	Pi	483
7	GPTGirlfriend	469
8	Pephop	380
9	Muah.AI	183
10	CHAI	158

国产

- FurryBar领跑但体量小(20万访问)，市场待开发

序号	产品名称	24年10月(万visit)
1	FurryBar	20
2	小冰虚拟	14
3	逗逗	14
4	冒泡鸭	1
5	通义星尘	1
6	AI小呆	0.2
7	万话	0.2
8	LumiAni	-
9	Lingo	-
10	白小喵	-

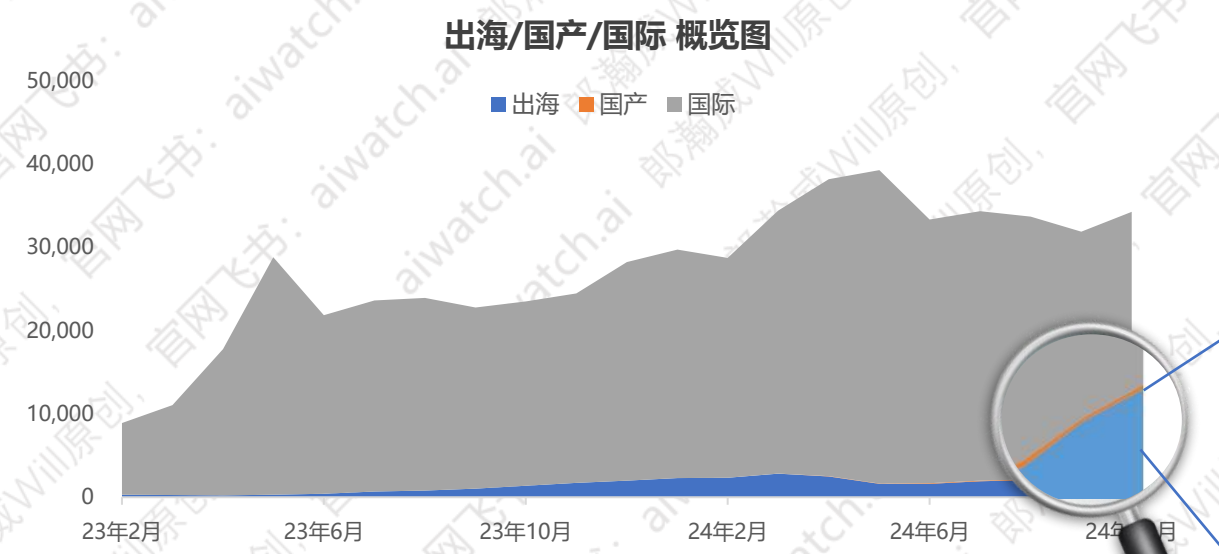
出海

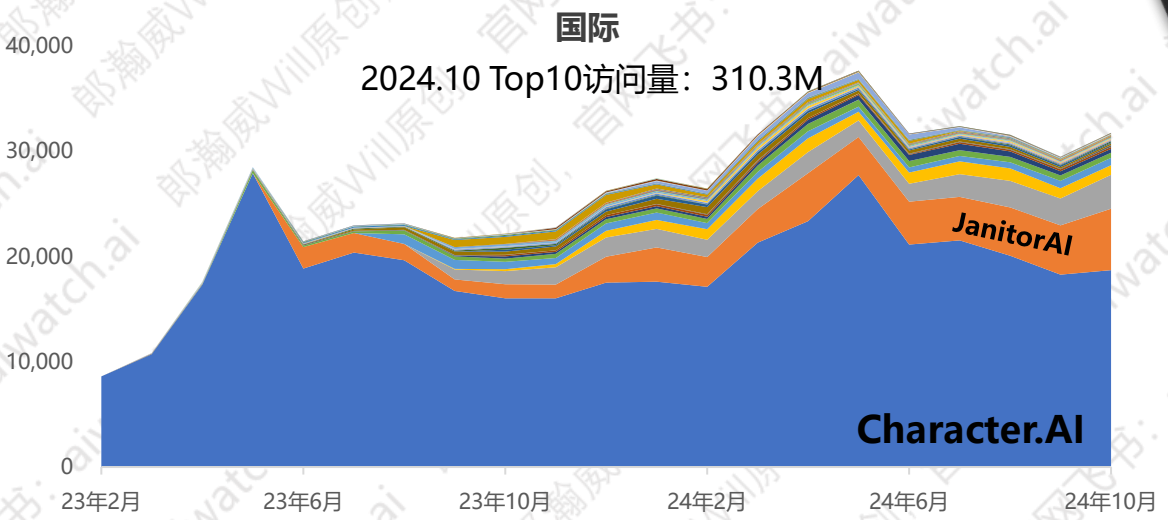
- Crush On领先(1,459万访问)，Talkie(714万访问)成长迅速

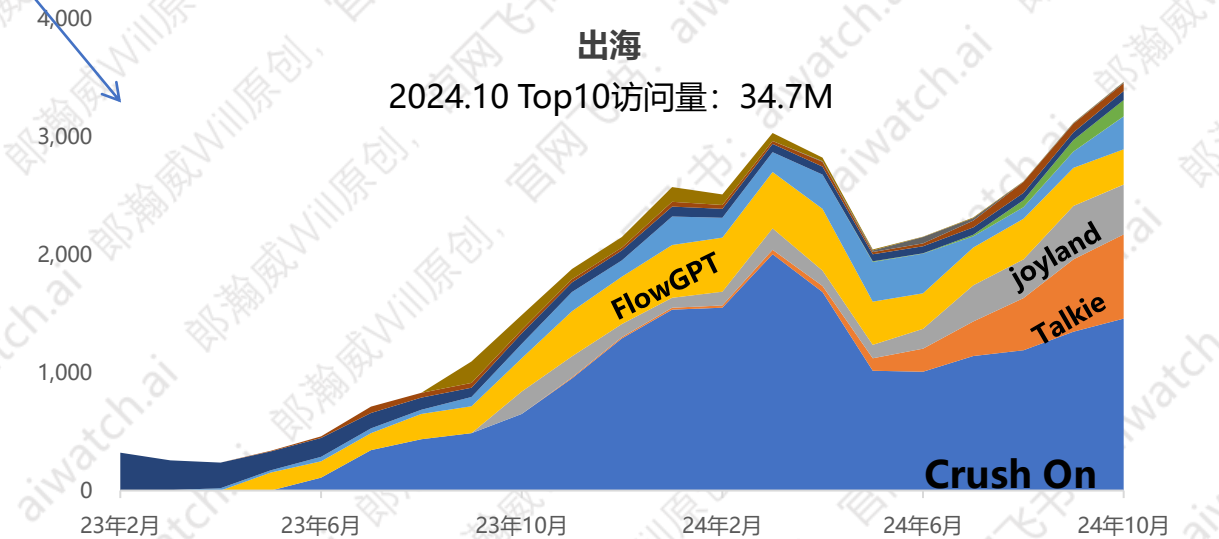
序号	产品名称	24年10月(万visit)
1	Crush On	1,459
2	Talkie	714
3	Joyland	422
4	FlowGPT	300
5	MyShell	278
6	Museland	140
7	Replika	75
8	Hi,Waifu	67
9	Monaland	9
10	NSFw CAI	2

数据来源：similarweb 单位：万visit

虚拟角色 国际 93.6% | 国产 0.1% | 出海 6.3%







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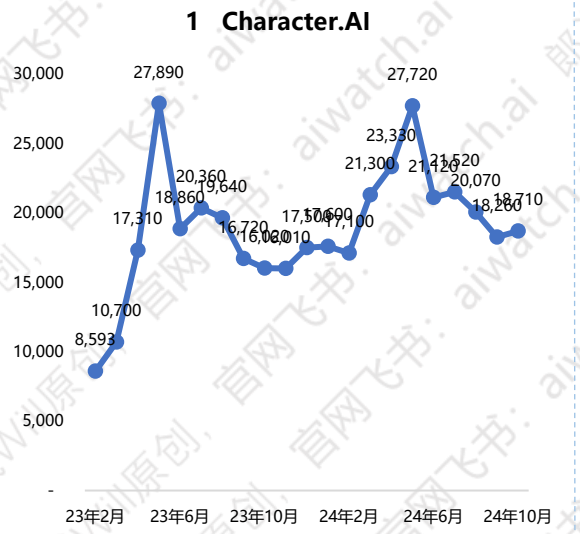
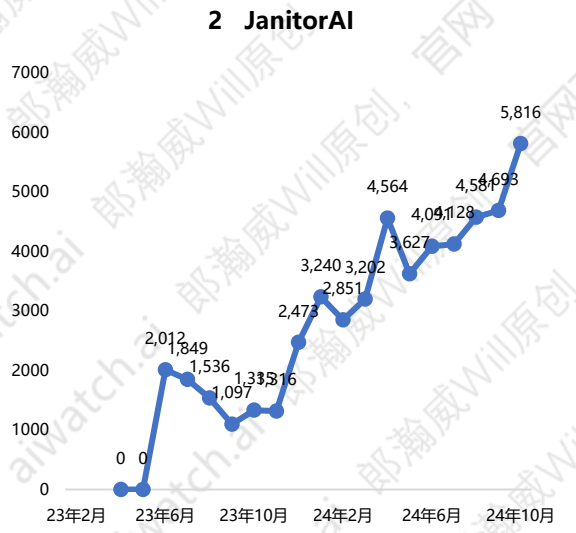
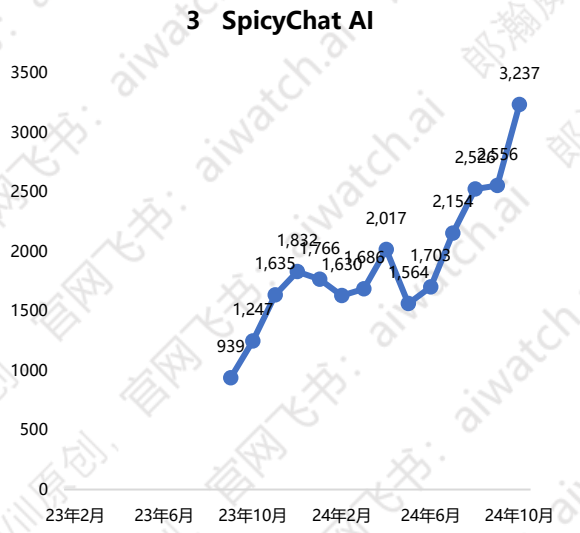
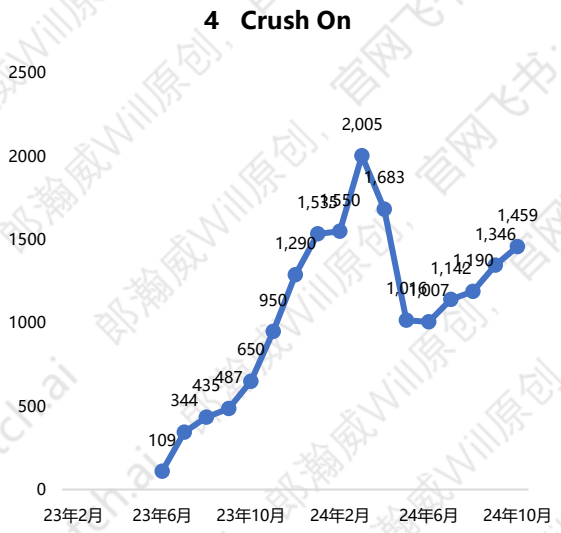
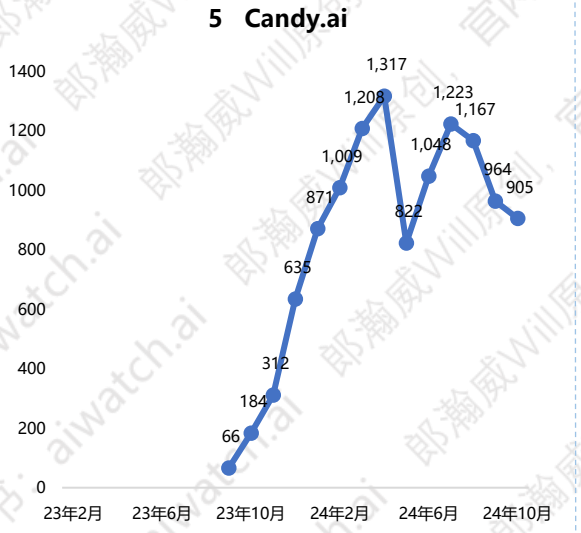
虚拟角色 No.1-No.8

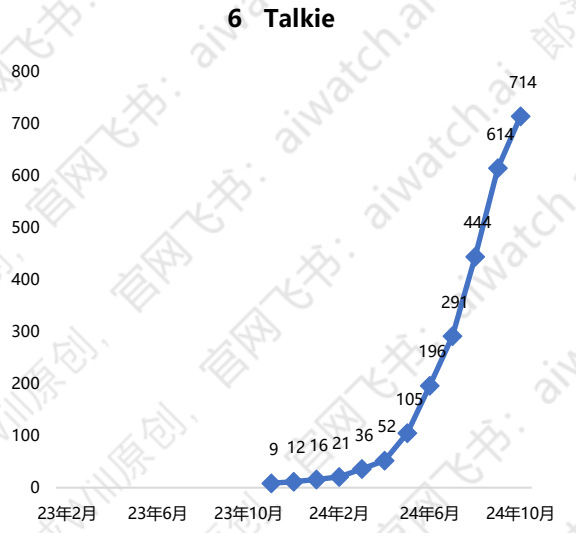


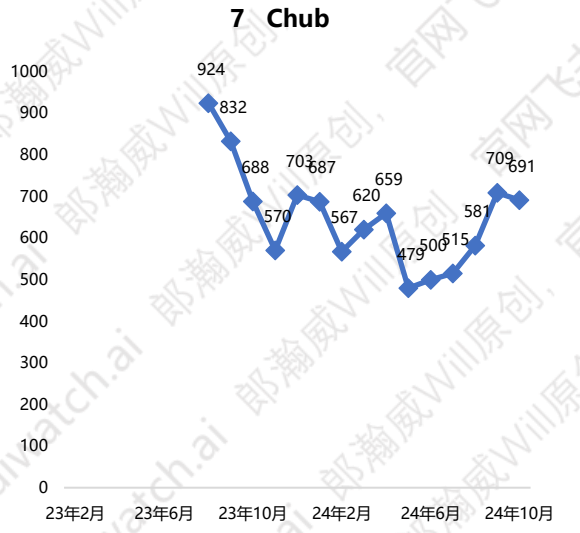


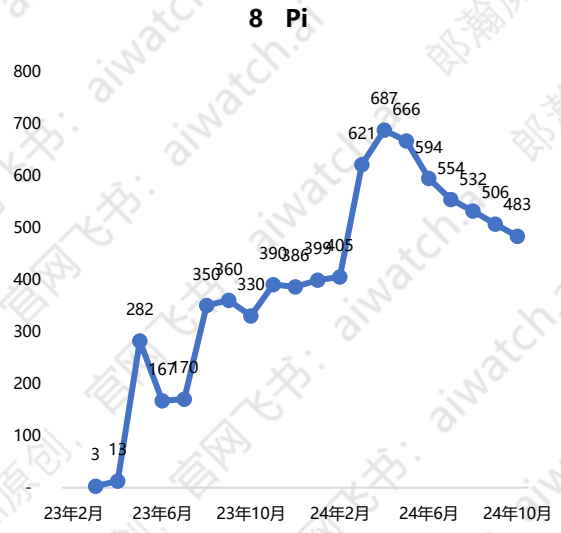












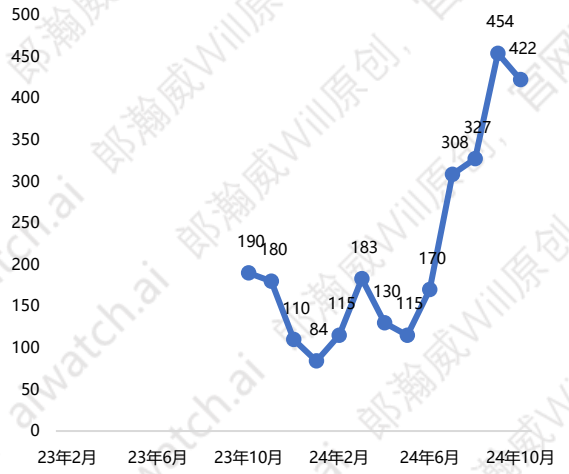
数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

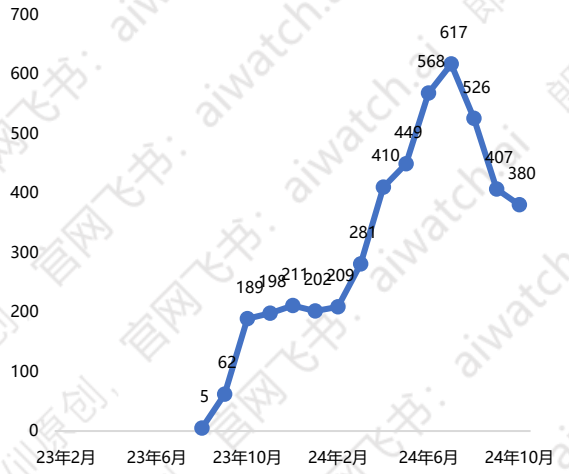
虚拟角色 No.9-No.16

9 GPTGirlfriend

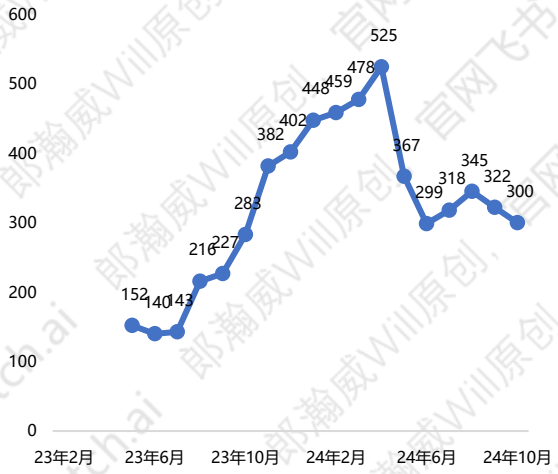
10 Joyland



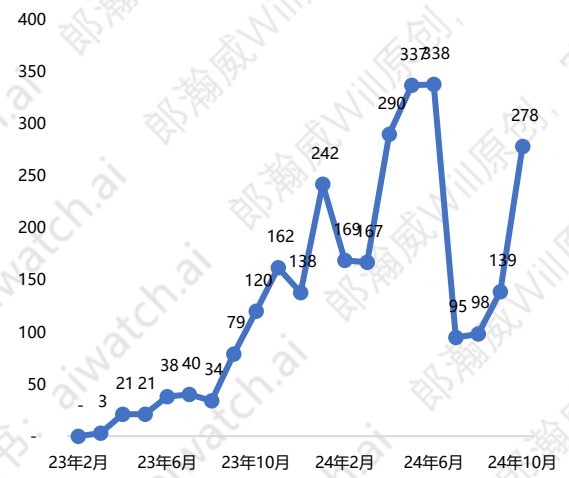
11 Pephop



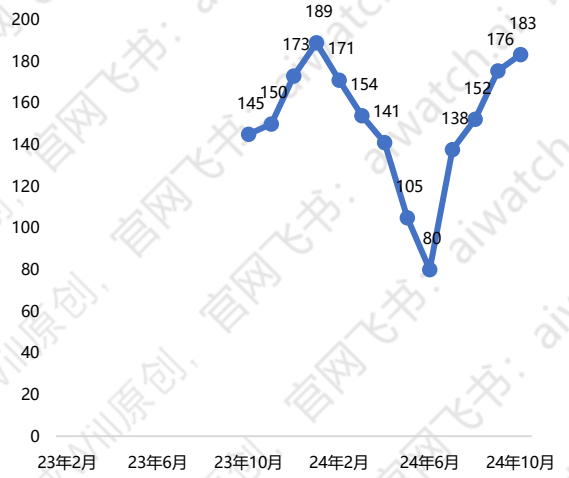
12 FlowGPT



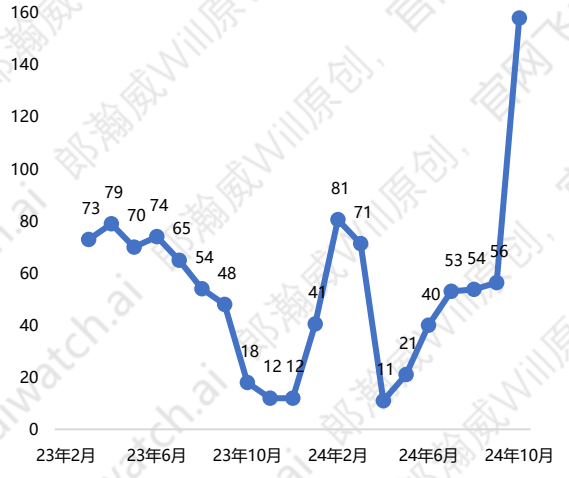
13 MyShell



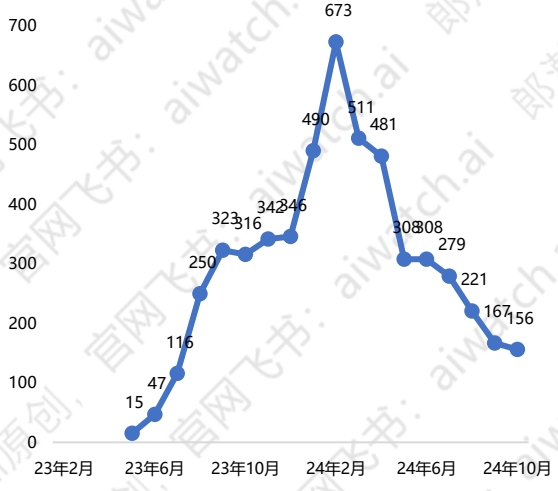
14 Muah.AI



15 CHAI



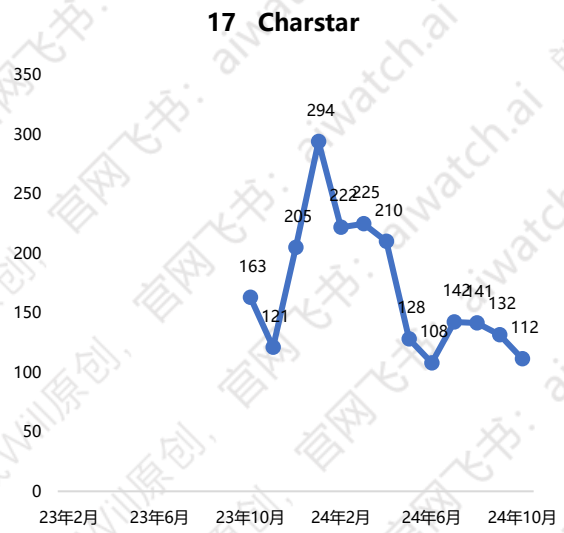
16 Dreamgf AI

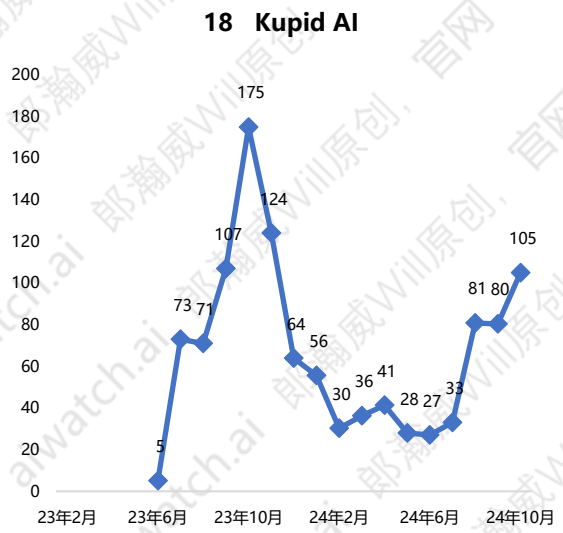


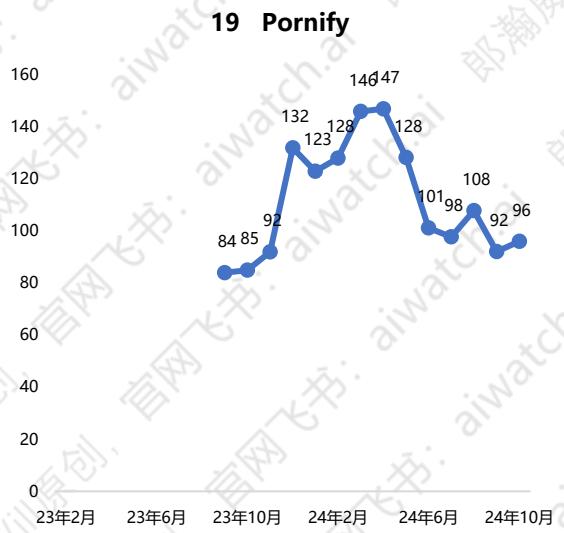
数据来源：similarweb 单位：万visit

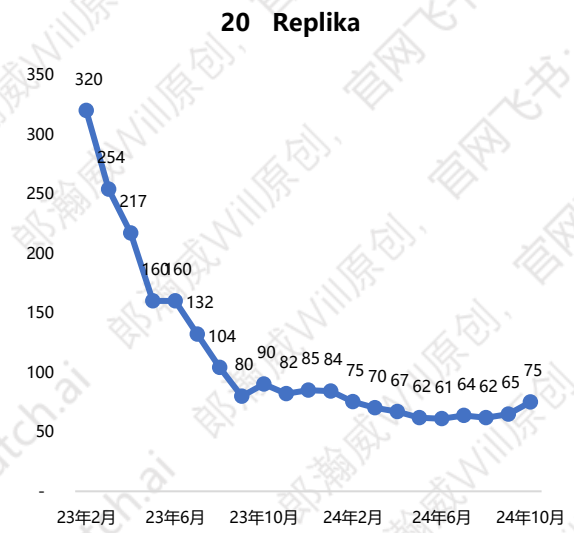
郎瀚威Will原创，官网飞书：aiwatch.ai

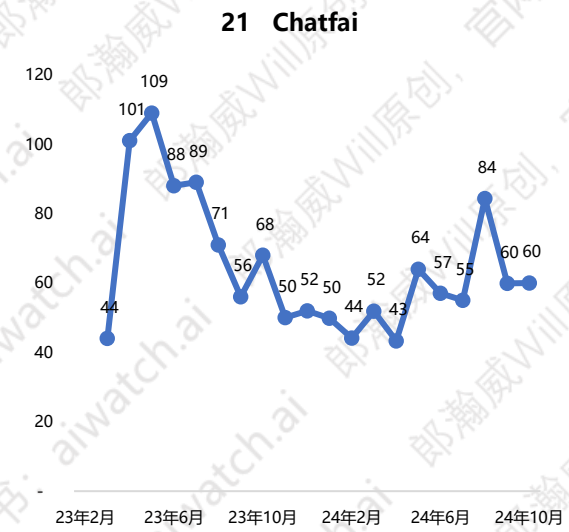
虚拟角色 No.17-No.24

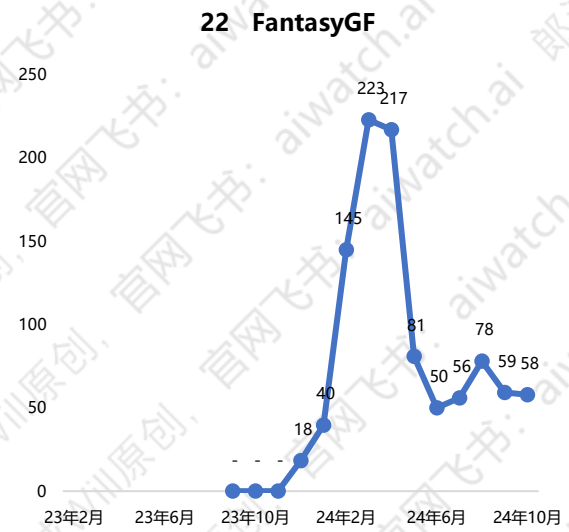


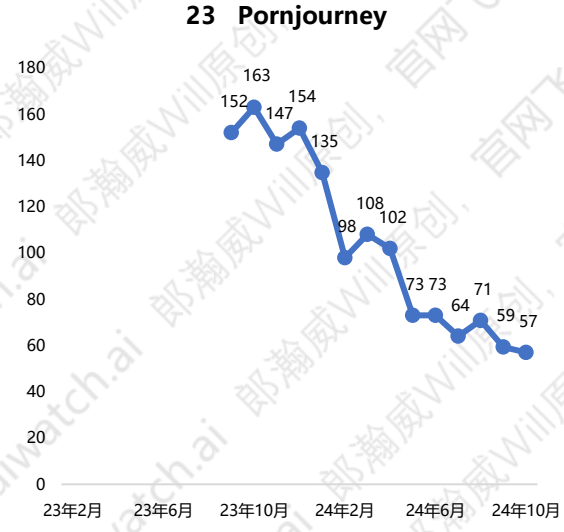


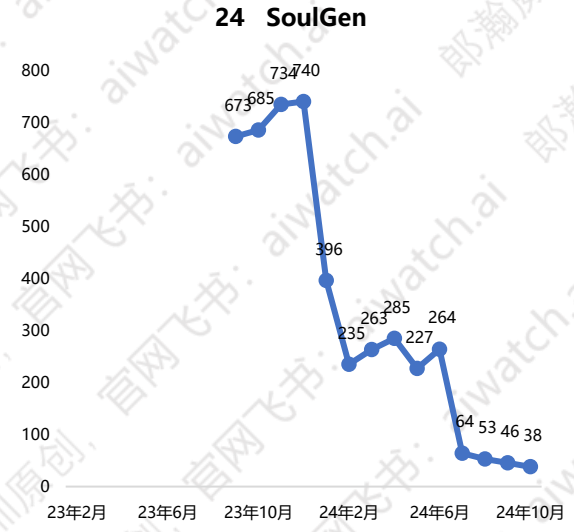






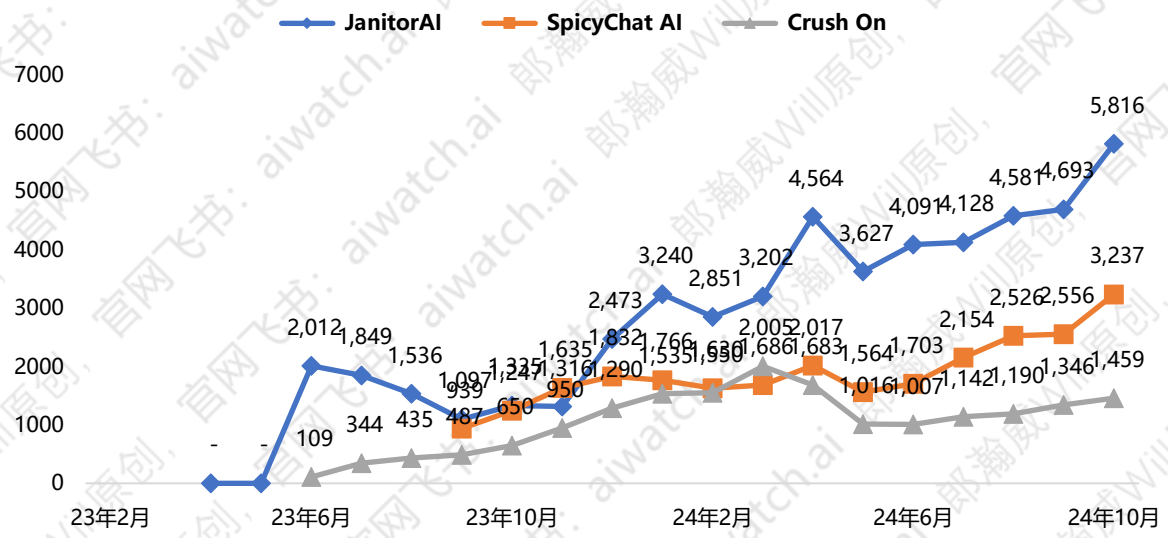


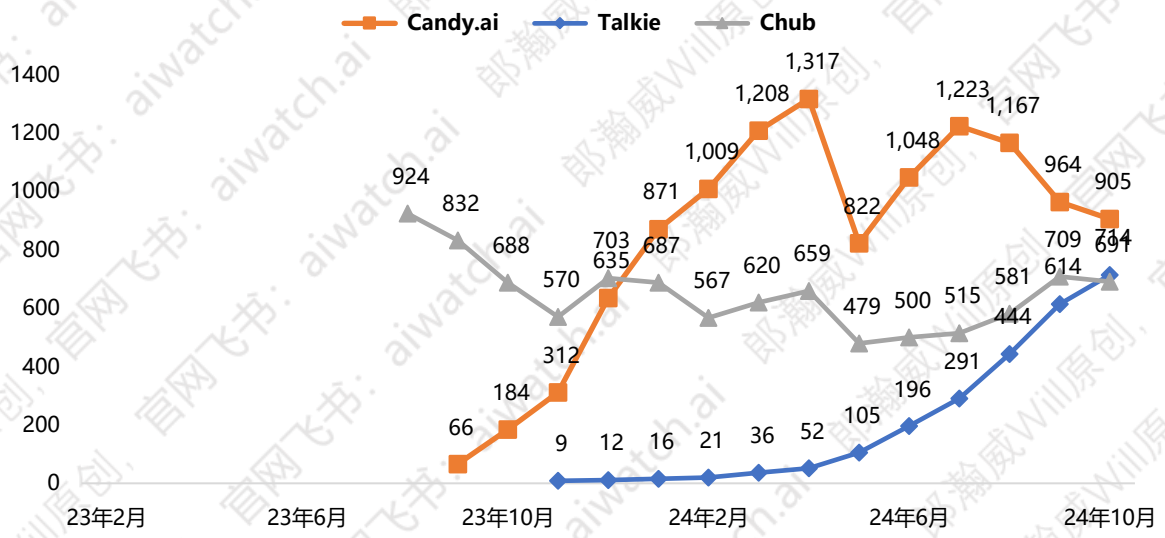


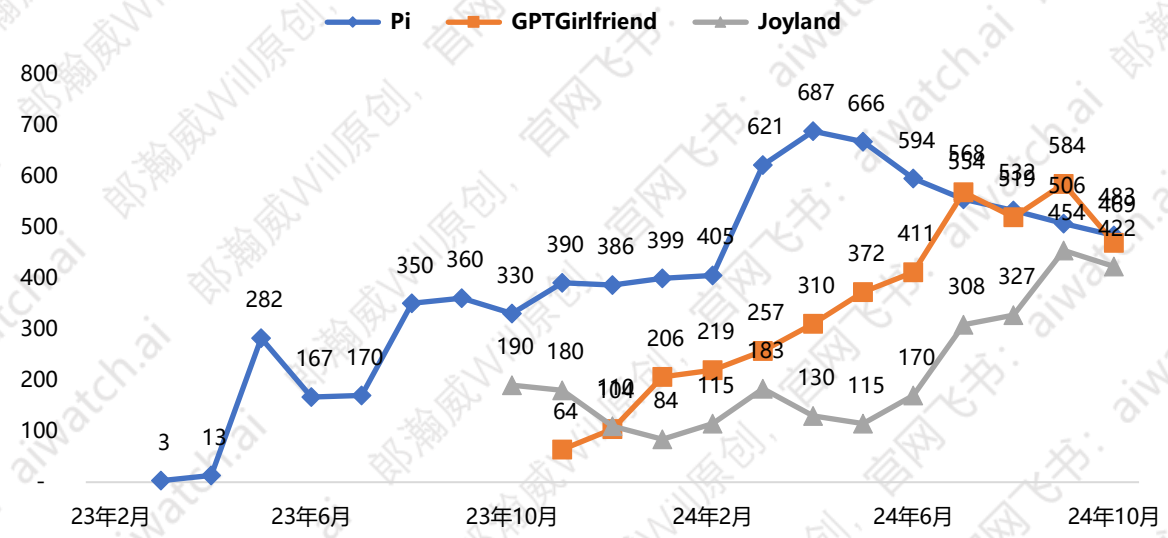


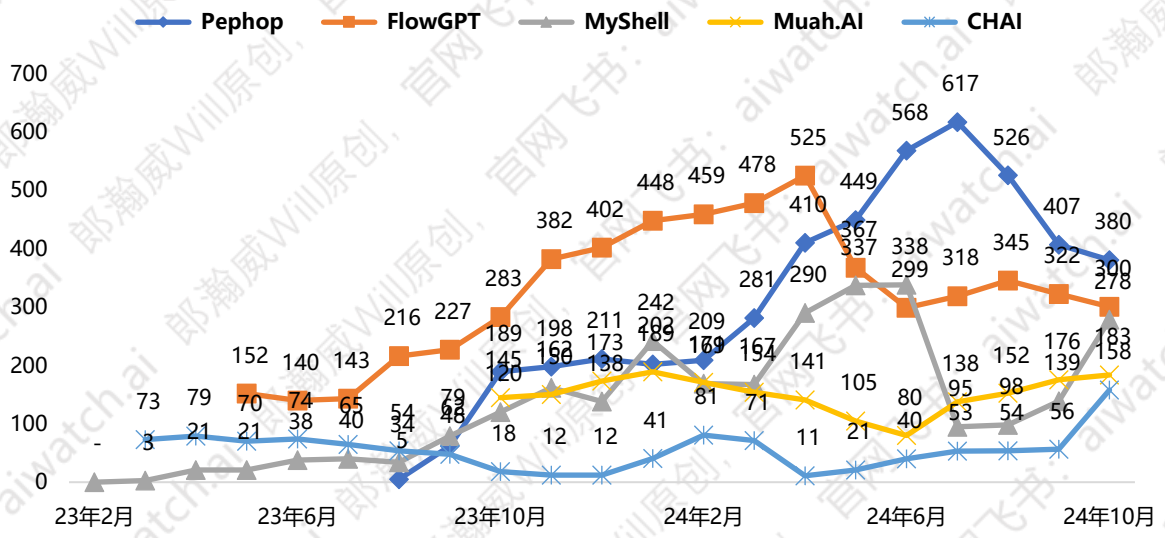
数据来源：similarweb 单位：万visit

虚拟角色 复合图表





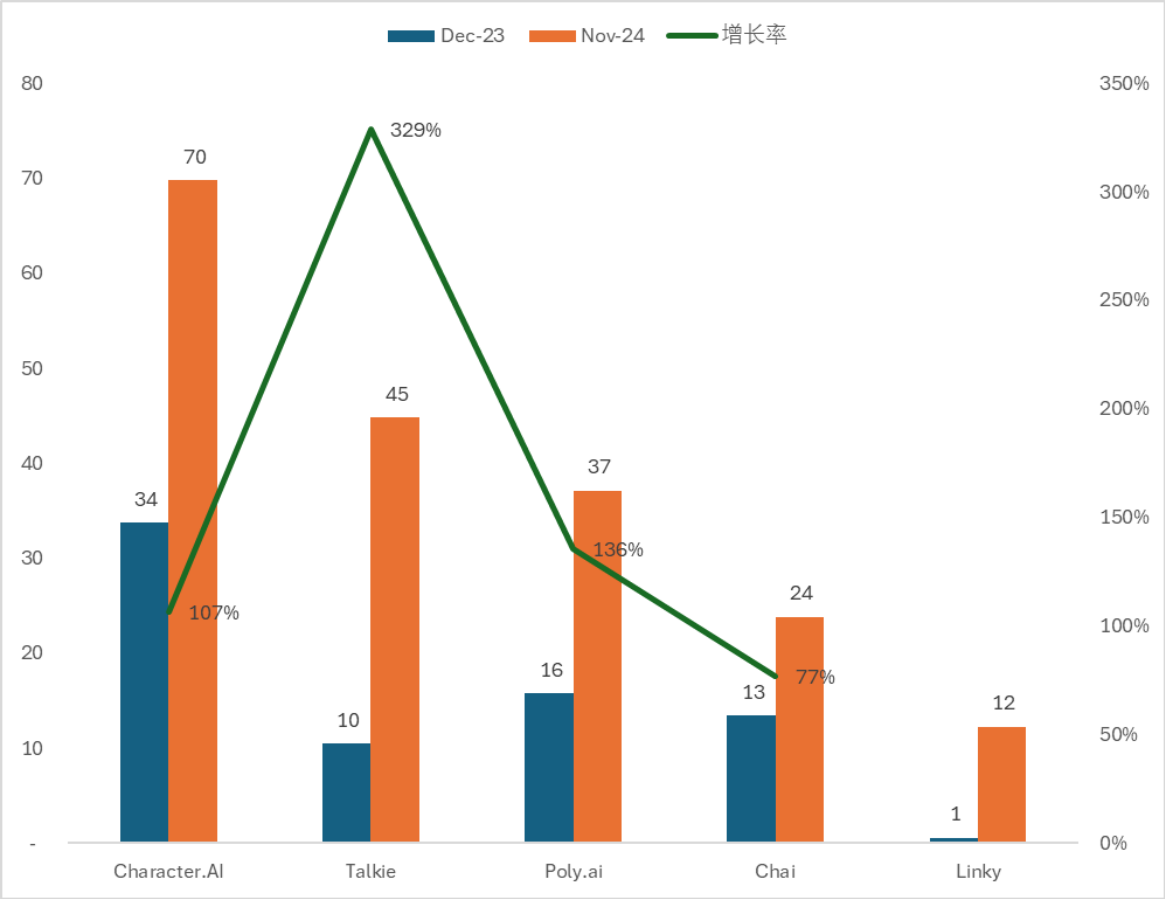




数据来源：similarweb 单位：万visit

虚拟角色 APP端MAU统计

- 由于虚拟陪伴领域手机端活跃度占比更高，
- 因此根据热心群友提供的APP活跃度数据（安卓+APP，单位百万MAU）作为参考



名称	Dec-23	Nov-24	增长率
Character.AI	33.8	69.8	107%
Talkie	10.5	44.8	329%
Poly.ai	15.7	37.1	136%
Chai	13.5	23.8	77%
Linky	0.6	12.3	

Agent低代码构建平台

Agent低代码构建平台

Agent低代码构建平台 – Takeaway

1. 这里指的Agent，是指2C类型的Agent平台，并不包括2B类型的产品，或者开源产品。
2. 2024年10月Agent赛道TOP15总访问量为758万次。
3. 字节扣子、GLIF和Coze占据前三位置，分别达到155万、122万和105万次访问，其中字节系产品（字节扣子、Coze）表现强势。
4. 增长方面最为亮眼的是Dify.ai，同比增长651%，而部分老牌产品如AgentGPT、Idomoo出现明显下滑，分别下降63%和45%。
5. 近期融资，其中Wordware获得3000万美元种子轮融资，Altera完成900万美元融资。
6. 从赛道结构来看，国际市场以美国产品为主，但中国产品正在快速崛起，尤其是字节系产品占据了相当大的市场份额。
7. Agent赛道呈现明显的工具化趋势，从产品定位上可以看到更多专注于特定场景的垂直应用出现，如Wordware专注文档处理、Dify.ai专注AI应用开发等。
8. 在出海表现上，Coze和Dify.ai展现出较强实力。

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

Agent低代码构建平台 TOP15

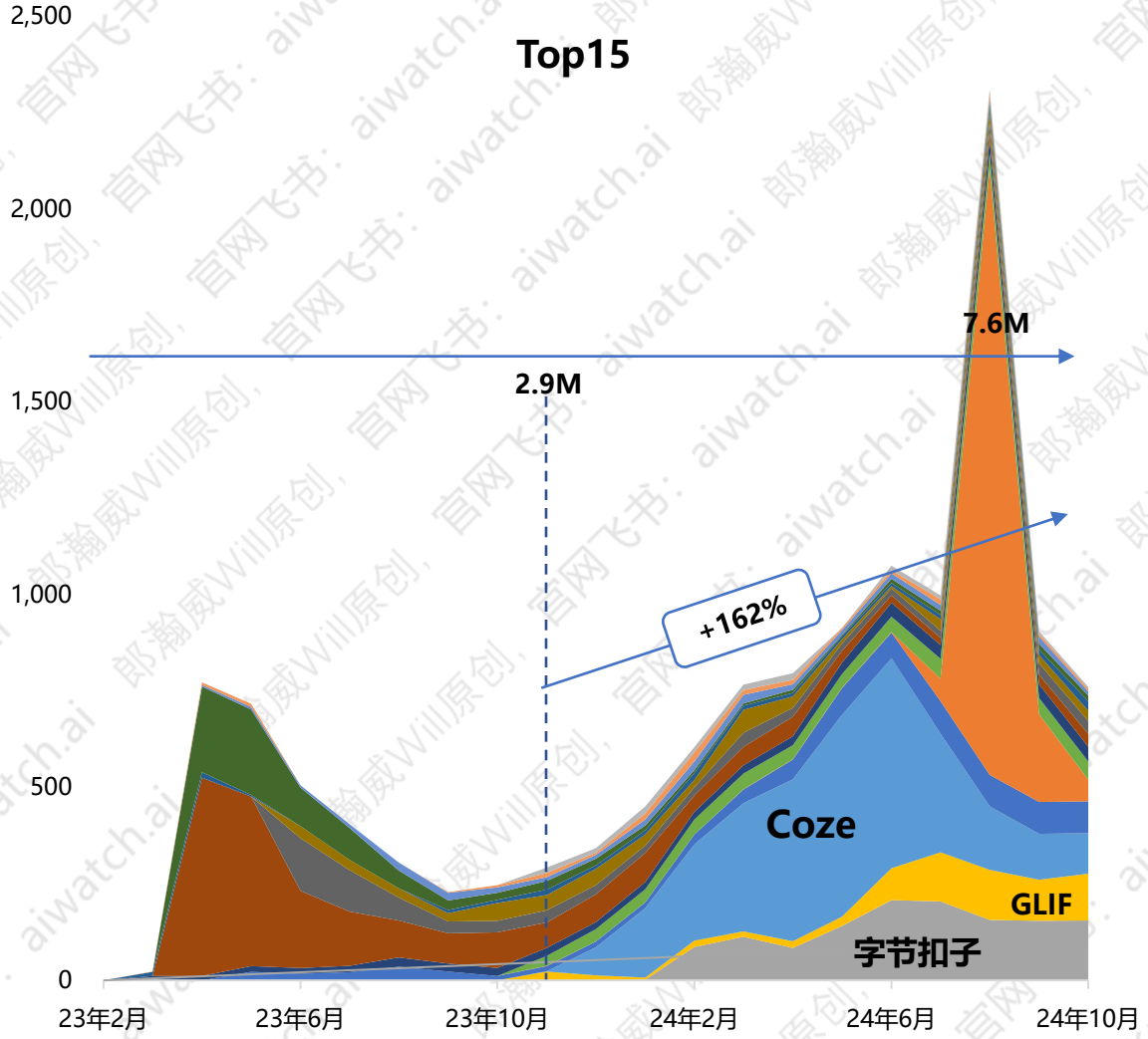
- **TOP15 总融资额：1.2亿美元** (Dify.ai (Dify.ai 2.85)+Wordware (Wordware 30M$)+Hex Magic (Hex Magic 28M$)+AutoGPT (AutoGPT 12M$)+Lindy (Lindy 35M$)+Altera (Altera 9M$)=116.85)
- **Top15 总网页流量：758万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	字节扣子		155	-	字节跳动	-	-	-	-	China	86%
2	GLIF		122	-	GLIF	-	-	-	-	Brazil	15%
3	Coze	-	105	-	字节跳动	-	-	-	-	China	25%
4	Dify.ai	11	83	651%	Dify.ai	A轮	2024/8/30	2.85	-	China	37%
5	Wordware		56	-	Wordware	种子轮	2024/11/21	30	-	United States	39%
6	Workato		47	-	Workato	-	-	-	-	United States	46%
7	Hex Magic	21	38	81%	Hex Magic	Venture	2023/3/23	28	-	United States	59%
8	AgentGPT	93	34	-63%	AgentGPT	-	-	-	-	United States	15%
9	AutoGPT(Git)	29	33	14%	AutoGPT（Git）	风险投资轮	2023/10/14	12	-	United States	13%
10	Idomoo	47	26	-45%	Idomoo	-	-	-	-	United States	82%
11	Lindy	8	25	213%	Lindy	B轮	2023/1/5	35	-	United States	34%
12	Altera		16	-	Altera	种子轮	2024/5/8	9	-	United States	32%
13	Godmode	18	15	-17%	Godmode	-	-	-	-	United States	31%
14	Heightsplatform	14	11	-21%	Heightsplatform	-	-	-	-	United Kingdom	19%
15	Multion	6	6	5%	Multion	-	-	-	-	United States	45%

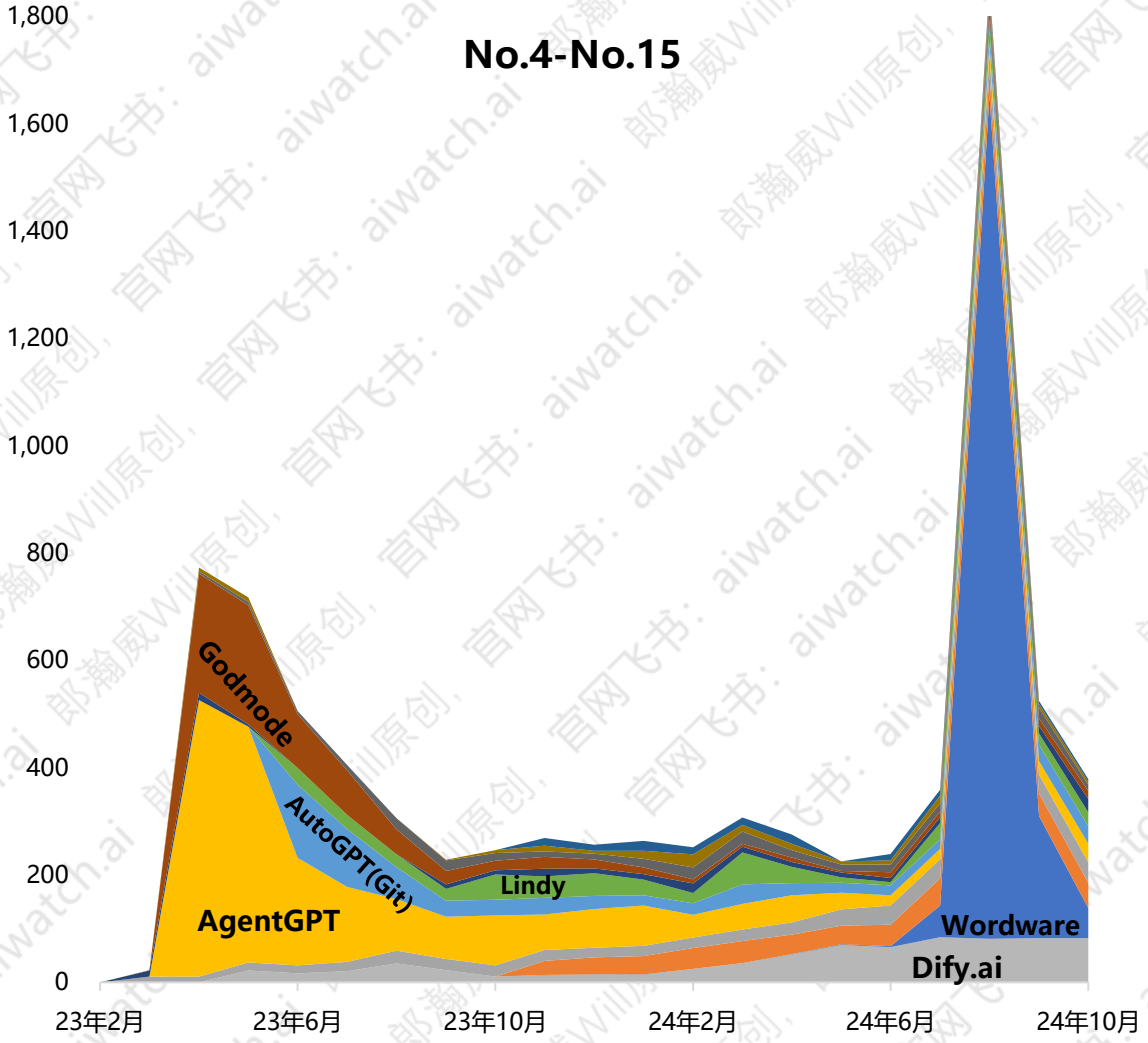
数据来源：similarweb 单位：万visit

Agent低代码构建平台 网页流量趋势 10月总量：758万

- 字节扣子、GLIF和Coze构成了市场的第一梯队，特别是在24年6月，三者形成了显著的集中爆发。其中Coze的增长最为迅猛，而宇节扣子和GLIF则保持相对稳定的增长态势，三者共同推动了市场的整体发展。



- 在第4-15名的竞争格局中，24年下半年见证了Dify.ai和Wordware的崛起，带动第二梯队迎来一波集中爆发，同时早期主导者如AgentGPT、Godmode的影响力逐步减弱，展现出市场新老更替的活力与竞争态势。

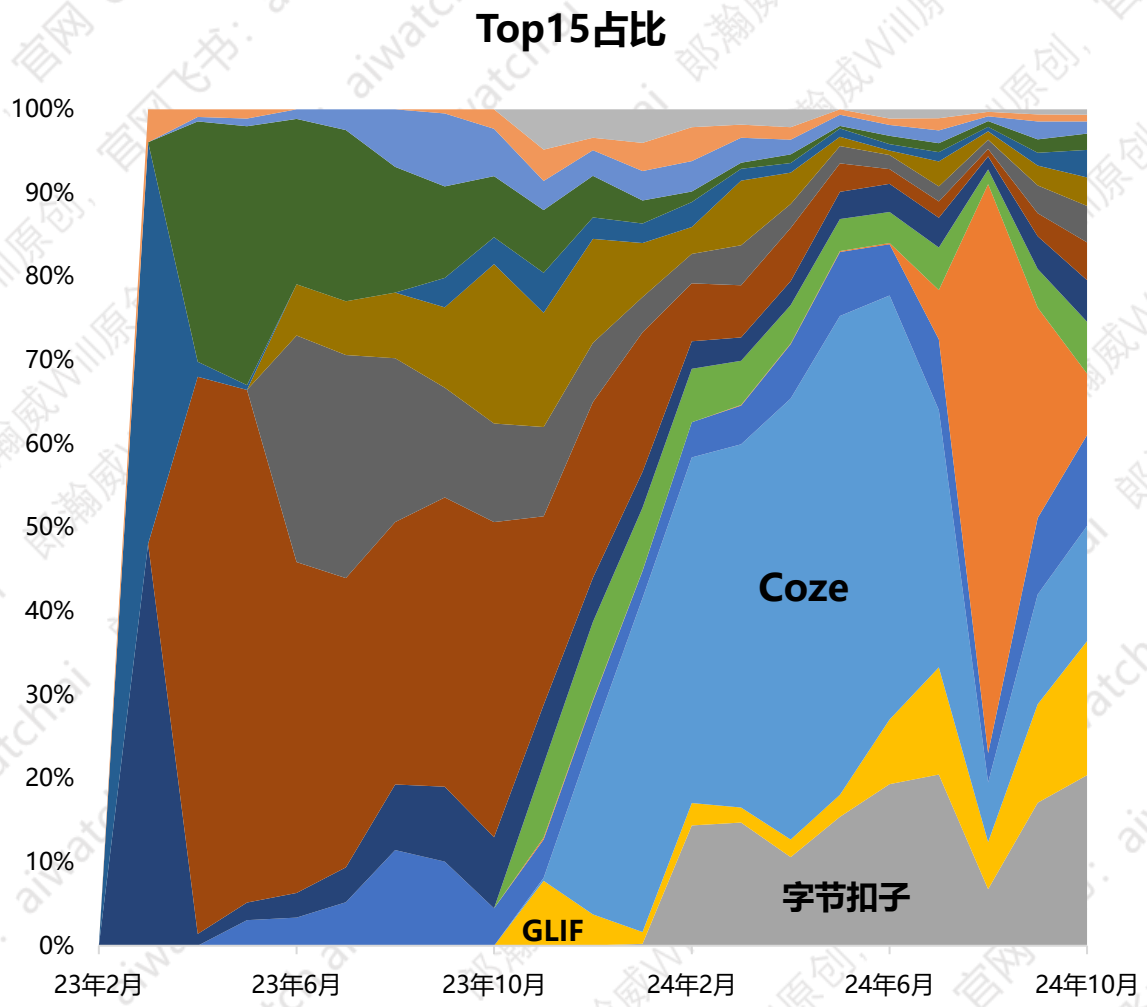


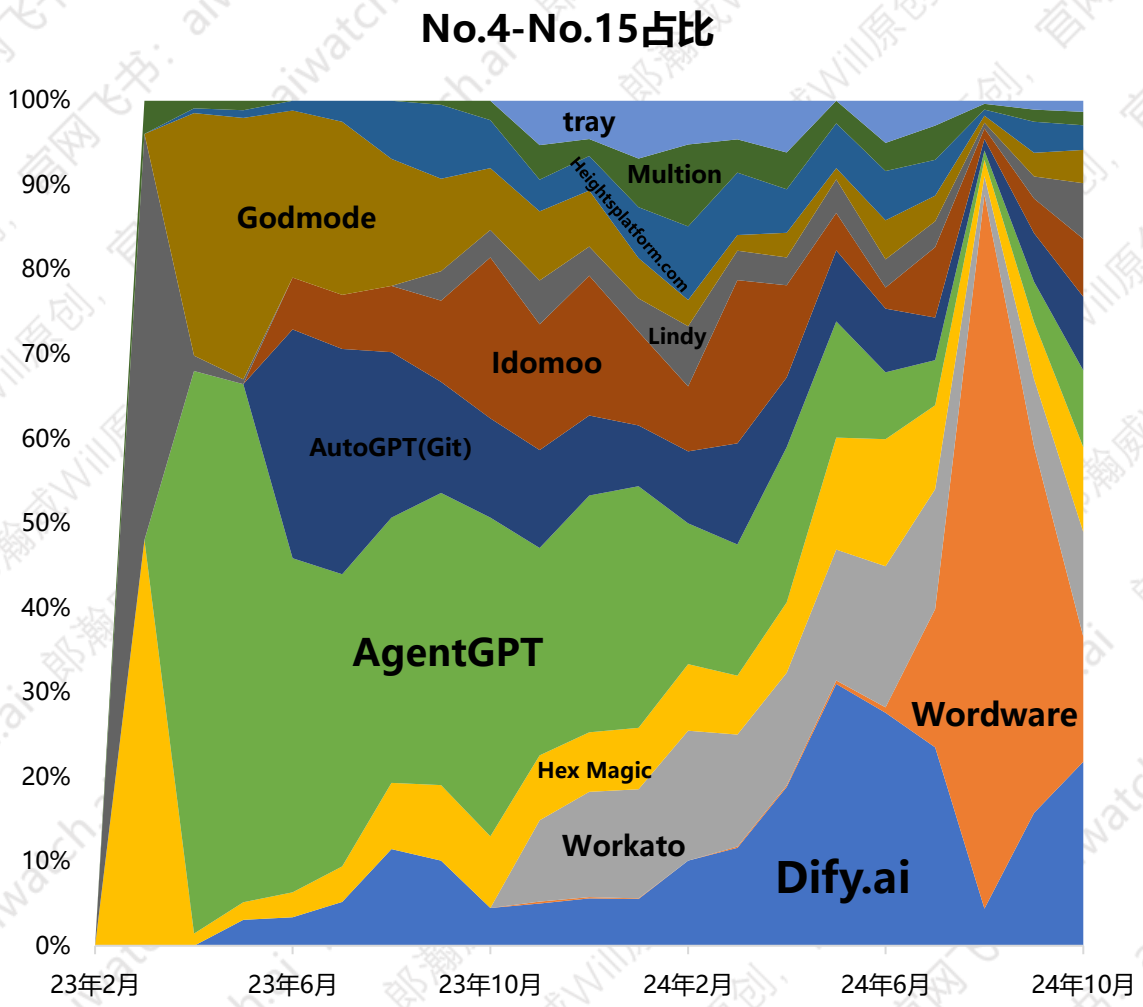
数据来源：similarweb 单位：万visit

Agent低代码构建平台 2023.2~2024.10 网页流量占比

- 到24年10月，字节扣子、GLIF和Coze形成三足鼎立之势，市场份额分布更趋均衡，竞争格局更加多元化

- Dify.ai异军突起，成为第二梯队新锐力量，Wordware、AgentGPT等产品份额此消彼长，市场竞争更加激烈，创新产品不断涌现，推动市场细分化发展





数据来源：similarweb 单位：万visit

Agent低代码构建平台 国际 | 国产 | 出海 Top10

国际

➢ GLIF领跑(122万访问)，美企占据主导地位

序号	产品名称	24年10月(万visit)
1	GLIF	122
2	Wordware	56
3	Workato	47
4	Hex Magic	38
5	AgentGPT	34
6	AutoGPT （Git）	33
7	Idomoo	26
8	Lindy	25
9	Altera	16
10	Godmode	15

国产

➢ 字节扣子一家独大(155万访问)，待深耕

序号	产品名称	24年10月(万visit)
1	字节扣子	155
2	Mighty AI	-
3	Autoagents未来式智能	-

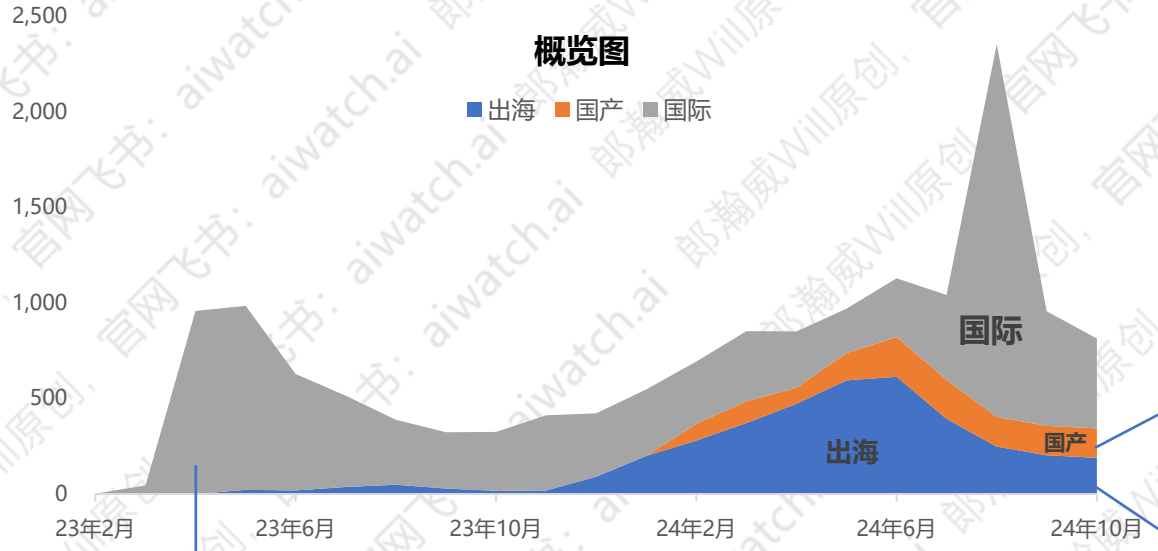
出海

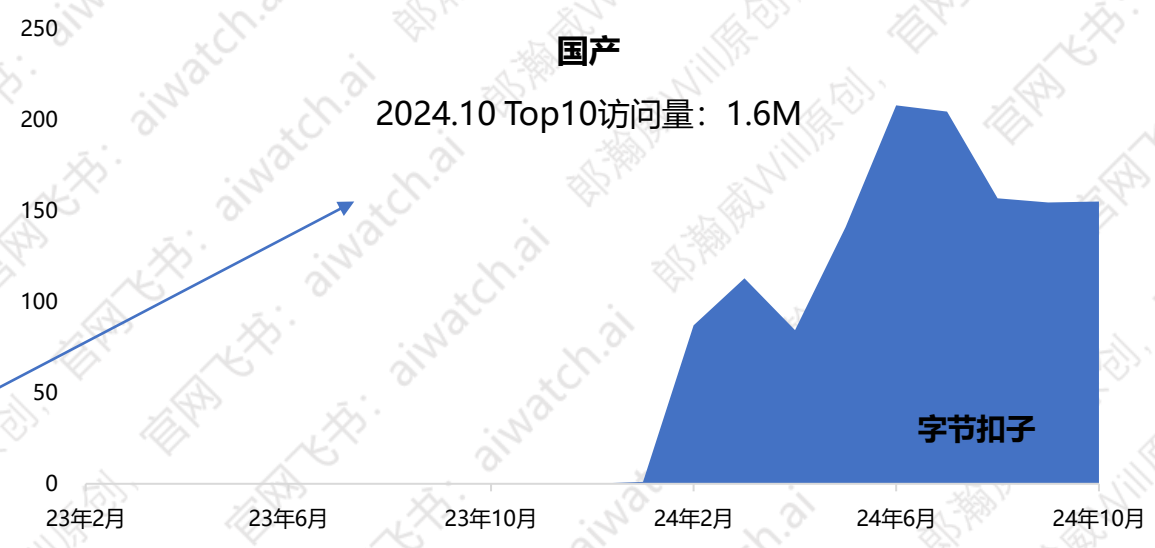
➢ Coze(105万访问)、Dify.ai(83万访问)表现亮眼

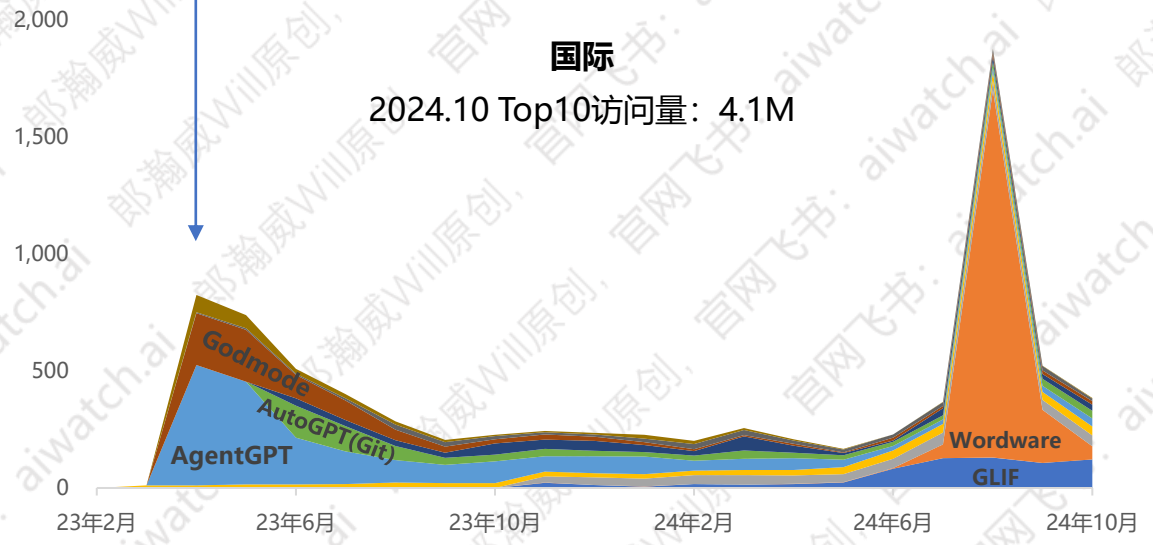
序号	产品名称	24年10月(万visit)
1	Coze	105
2	Dify.ai	83
3	MindOS	1

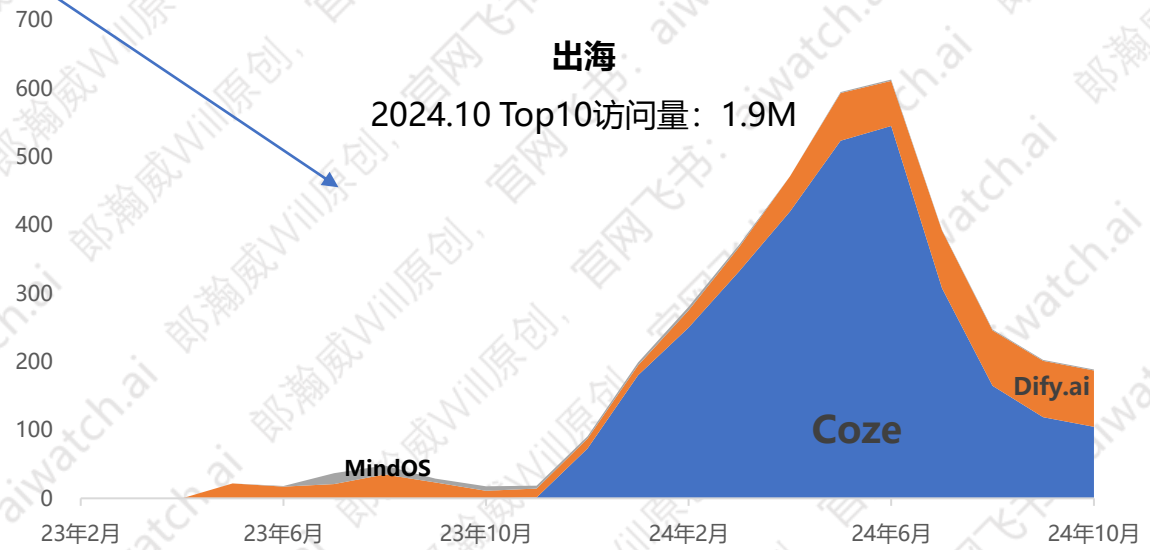
数据来源：similarweb 单位：万visit

Agent低代码构建平台 国际 66% | 国产 9% | 出海 25%





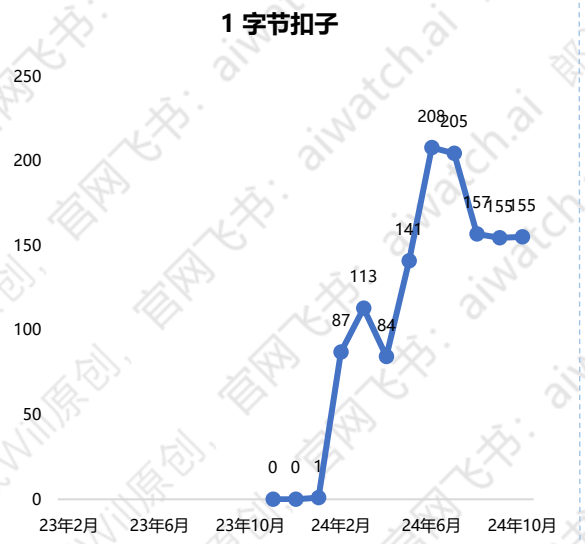


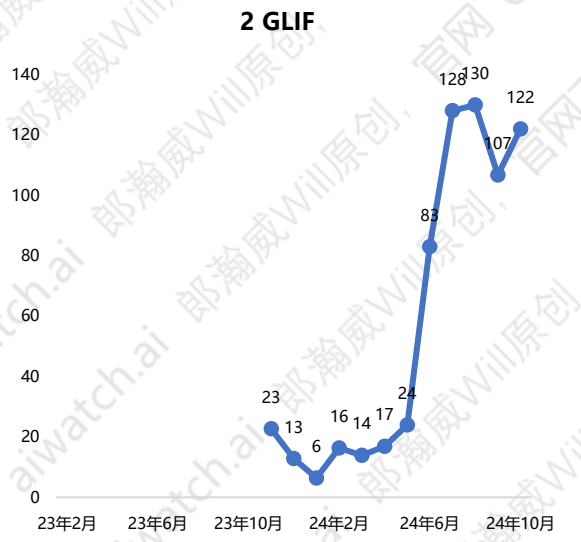


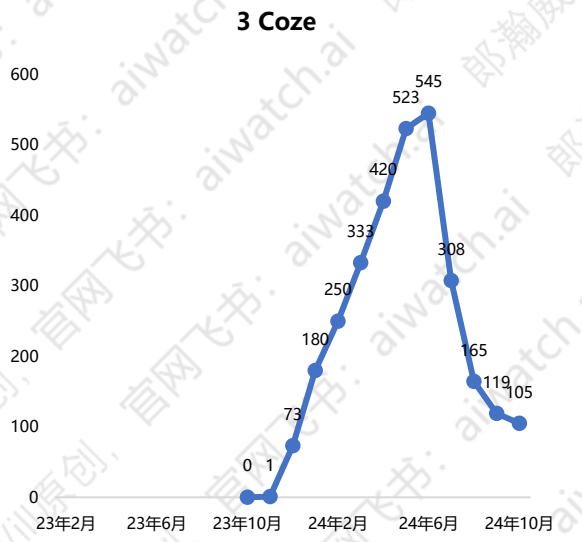
数据来源：similarweb 单位：万visit

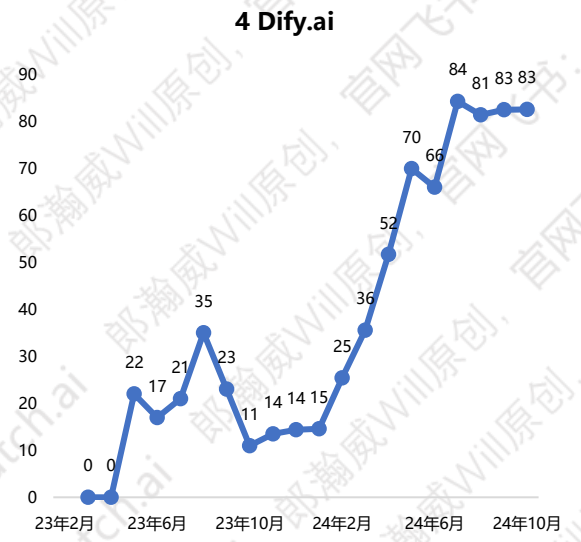
郎瀚威Will原创，官网飞书：aiwatch.ai

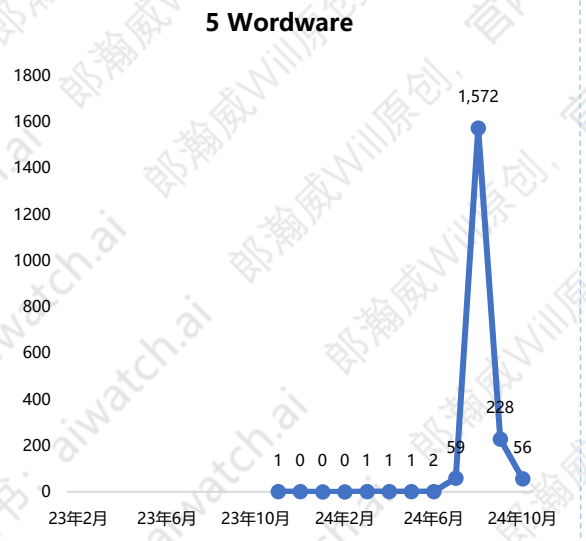
Agent低代码构建平台 No.1-No.8

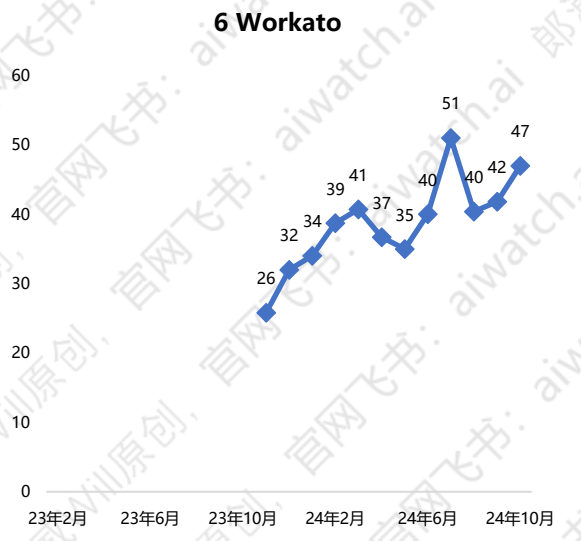


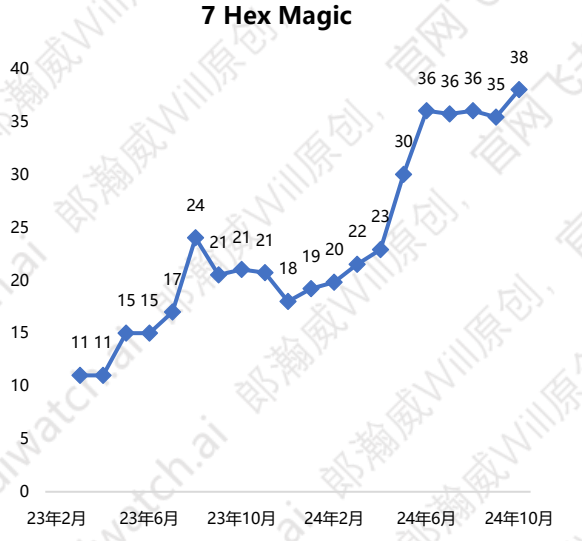


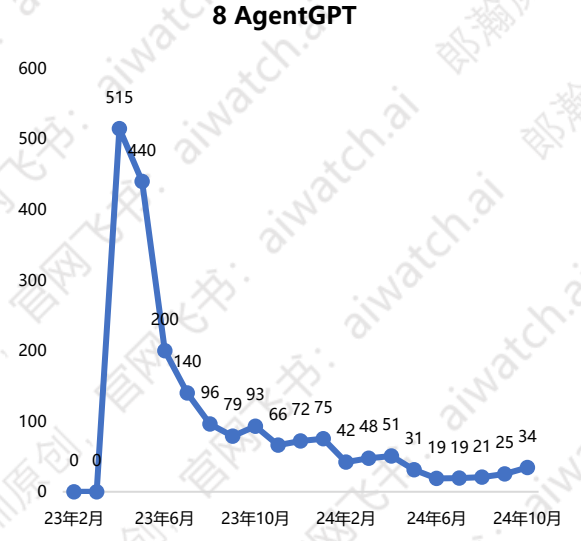






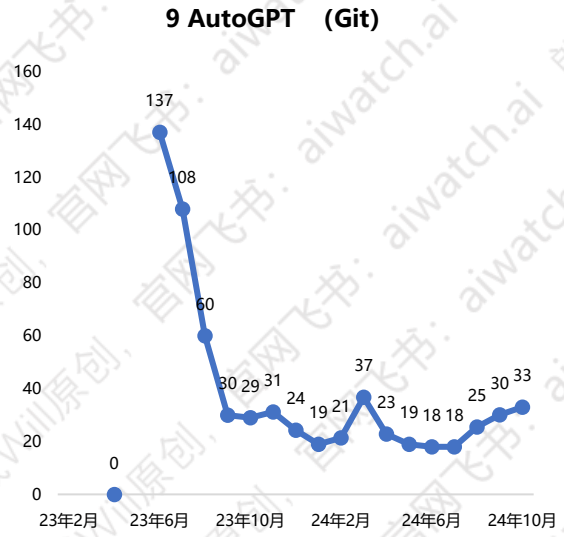


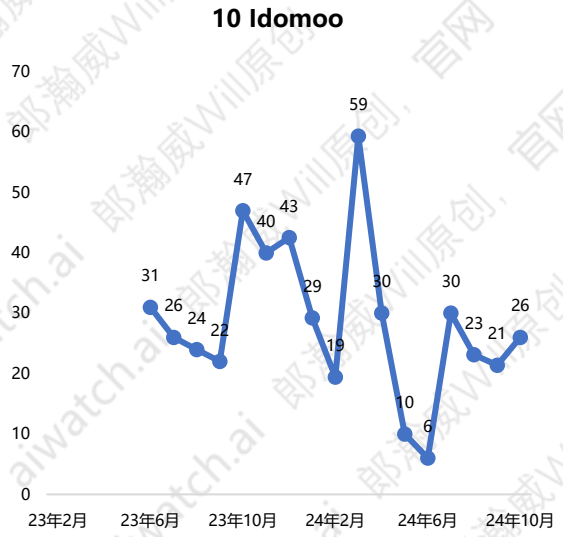


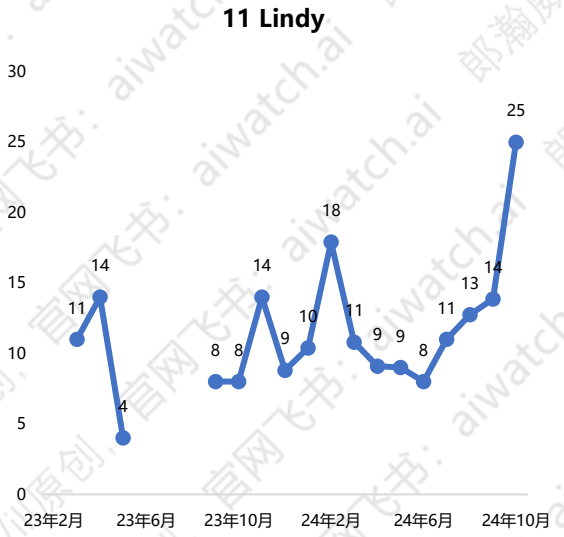


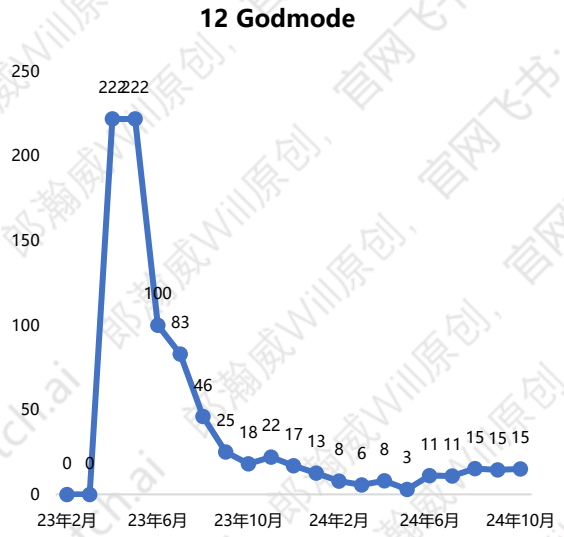
数据来源：similarweb 单位：万visit

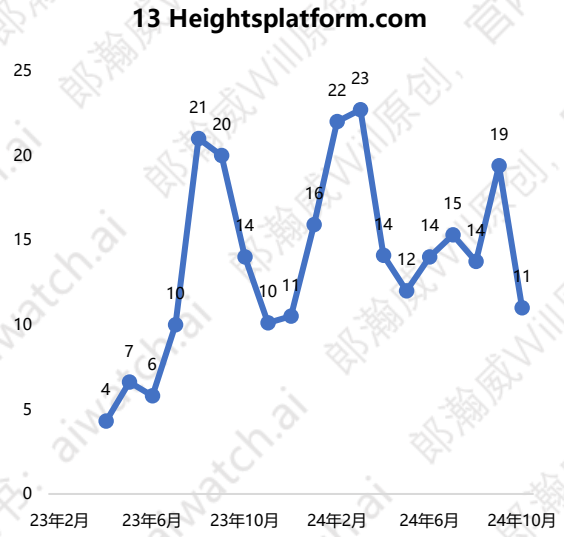
Agent低代码构建平台 No.9-No.16

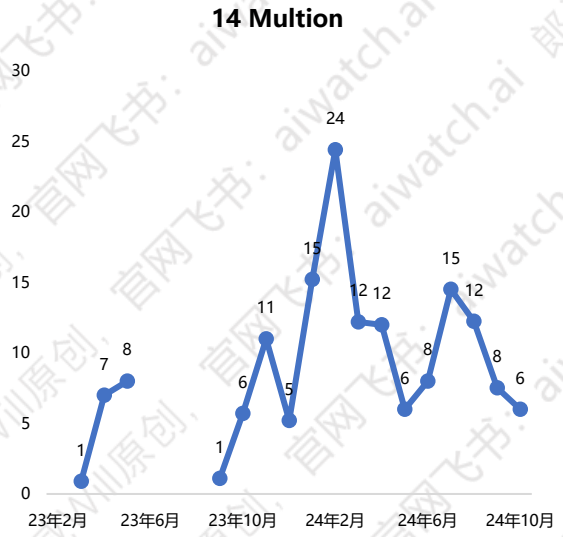


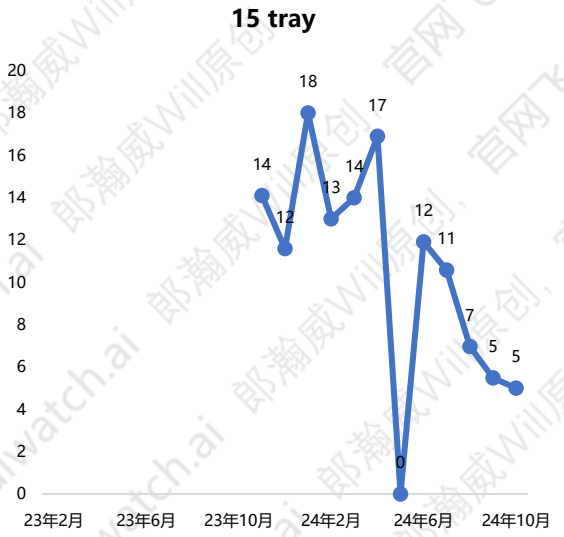


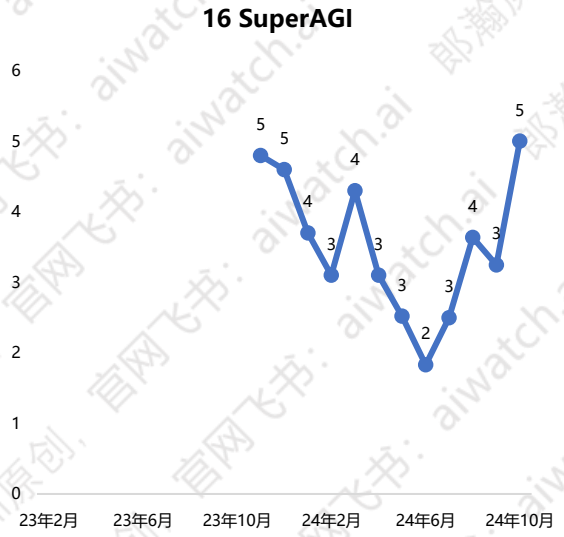






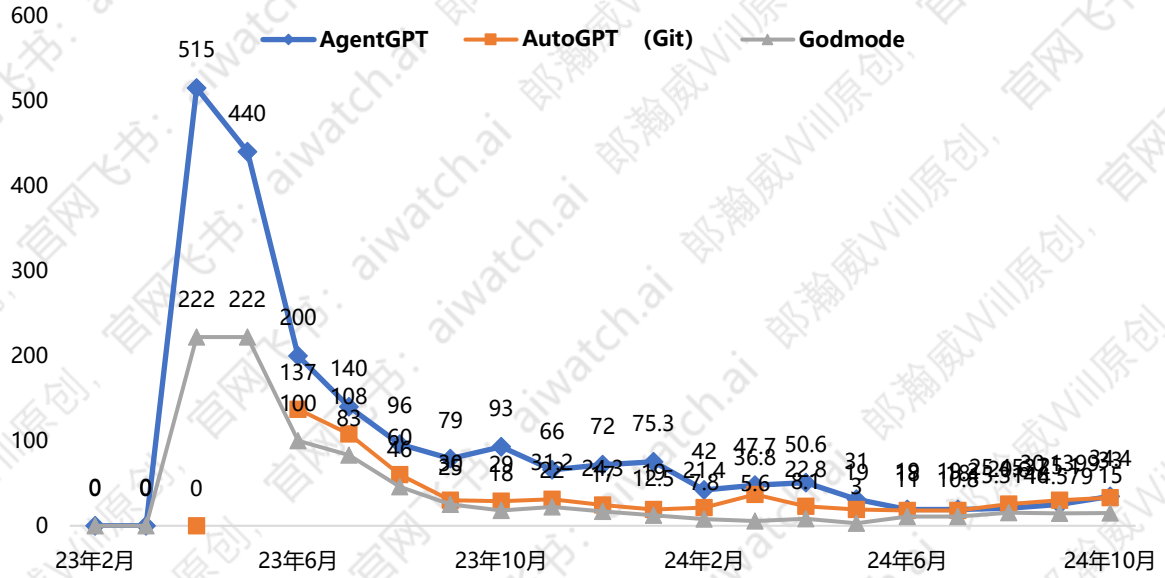


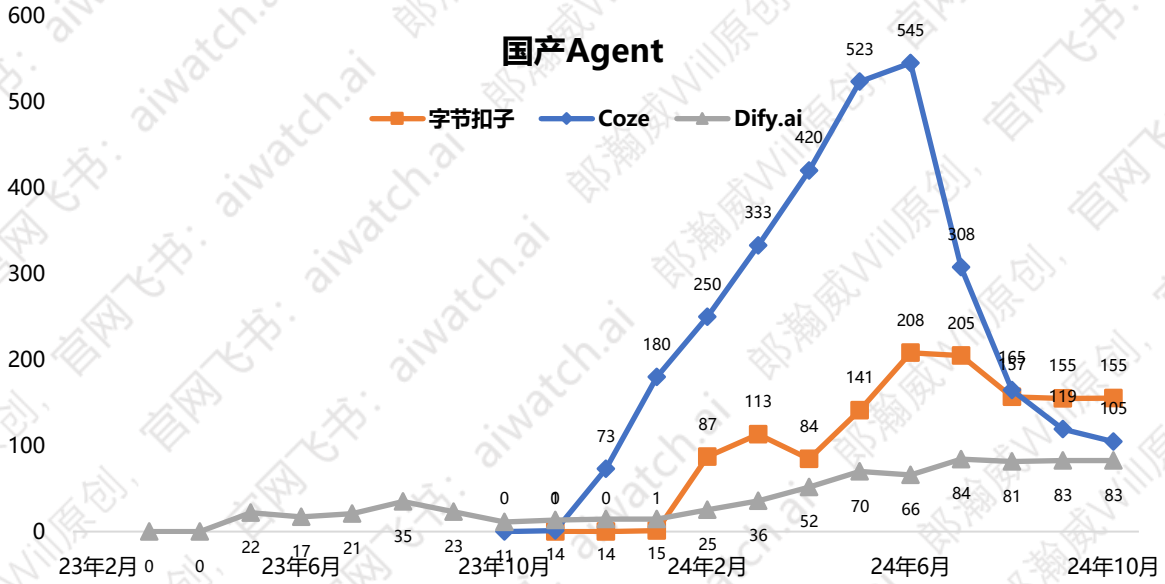


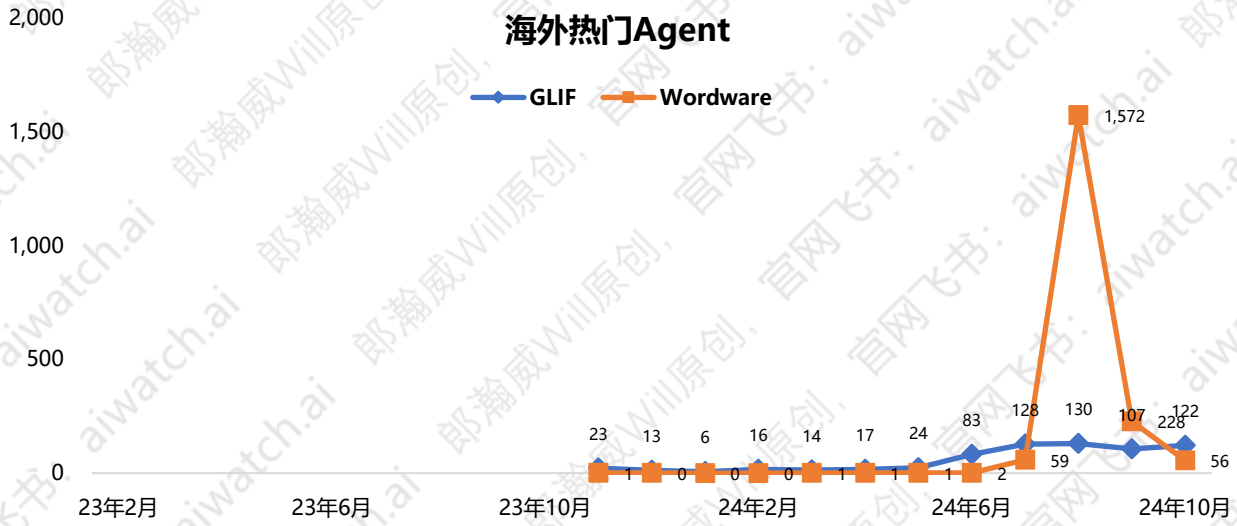


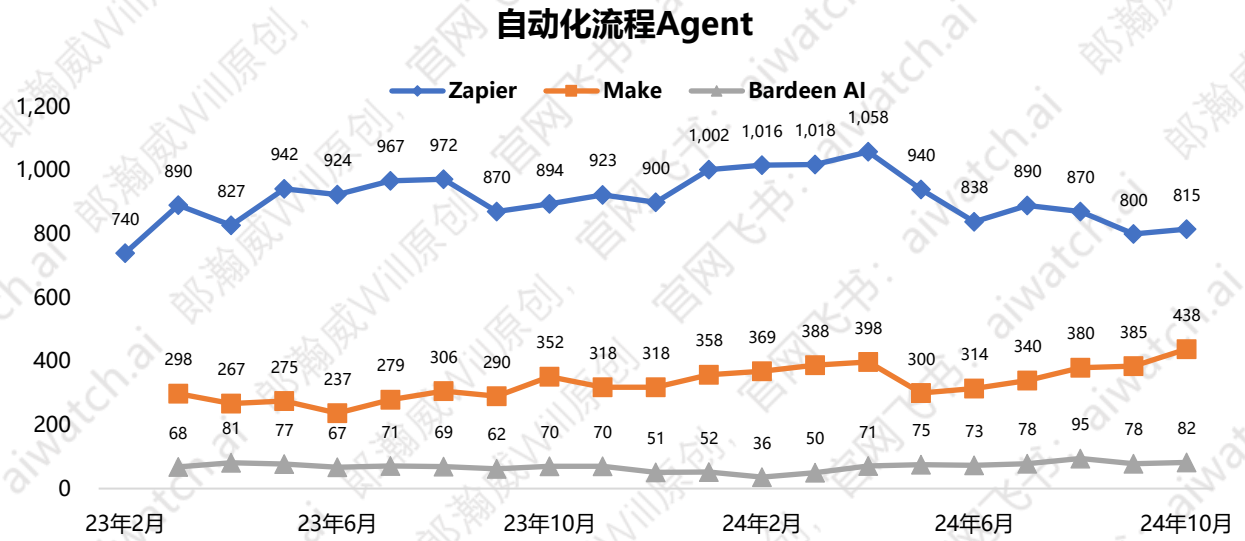
数据来源：similarweb 单位：万visit

Agent低代码构建平台 产品对比









数据来源：similarweb 单位：万visit

编程助手

编程助手

编程助手 – Takeaway

1. 这里统计的编程助手流量，仅为其官网流量，并不包括API及其他使用量
2. 11月份编程助手赛道的网站总访问量达3733万次。
3. 前三名分别是bolt.new(644万访问)、Cursor(629万访问)和Replit agent(522万访问)，占据总流量的近48%。
4. Top15累计融资额达7.71亿美元，主要投资者青睐Vercel Labs(2.5亿美元E轮)、Creatio(2亿美元PE轮)、Codeium(1.5亿美元C轮)等头部企业。
5. 从增速看，Cursor同比增长断崖领先，CodeRabbit增长579%位居第二，但Replit agent同比下降75%，市场格局正在重塑。
6. 从整体趋势来看，行业流量规模保持稳定增长。
7. 新晋玩家bolt.new和Cursor迅速崛起，占据头部流量位置，而传统玩家如Visual StudioIntelliCode和Replit agent的份额在逐步下降，AI编程助手工具的迭代速度在加快。

数据来源：similarweb 单位：万visit

编程助手 - Top15

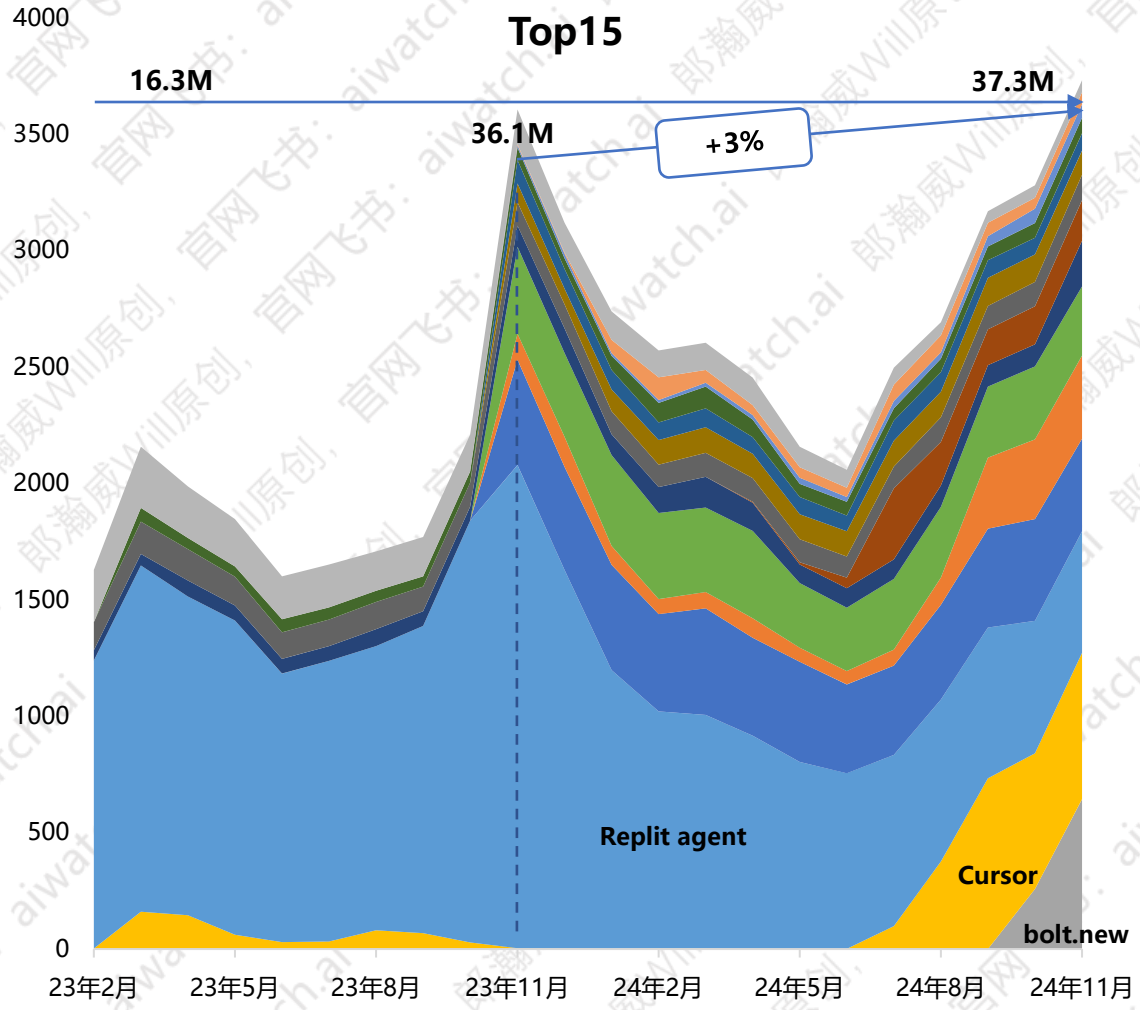
- **TOP15 总融资额：7.71亿美元** (Cursor (Anysphere 60M$)+Replit agent (Replit 20M$)+v0.dev (Vercel Labs 250M$)+Creatio (Creatio 200M$)+Codeium (Codeium 150M$)+Warp AI (Warp AI 50M$)+CodeRabbit (CodeRabbit 16M$)+Tabnine (Tabnine 25M$)=771M$)
- **Top15 总网页流量：3762万次visit**

序号	产品名称	23年11月（万visit）	24年11月（万visit）	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	bolt.new		644	-	stackblitz	-	-	-	-	India	18%
2	Cursor	4	629	14528%	Anysphere	A轮	2024/8/9	60	50	United States	22%
3	Replit agent	2,075	522	-75%	Replit	Venture Round	2023/11/6	20	28	United States	31%
4	Visual Studio IntelliCode	453	397	-12%	微软	-	-	-	-	China	13%
5	v0.dev	112	358	220%	Vercel Labs	E轮	2024/5/16	250	-	India	15%
6	Bubble	373	297	-20%	Bubble	-	-	-	-	United States	22%
7	Codeium（windsurf AI）	92	196	113%	Codeium	C轮	2024/8/29	150	80	United States	16%
8	websim		174	-	websim	-	-	-	-	United States	16%
9	CodeAssist	100	109	9%	CodeAssist	-	-	-	-	United States	22%
10	Creatio	81	104	28%	Creatio	Private Equity Round	2024/6/26	200	-	United States	43%
11	豆包MarsCode		79	-	字节	-	-	-	-	China	82%
12	Glide	100	74	-26%	Glide	-	-	-	-	United States	17%
13	Warp AI	54	67	24%	Warp AI	B轮	2023/6/21	50	-	United States	19%
14	CodeRabbit	9	58	579%	CodeRabbit	A轮	2024/8/14	16	-	India	23%
15	Tabnine	157	53	-66%	Tabnine	B轮	2023/11/8	25	-	India	11%

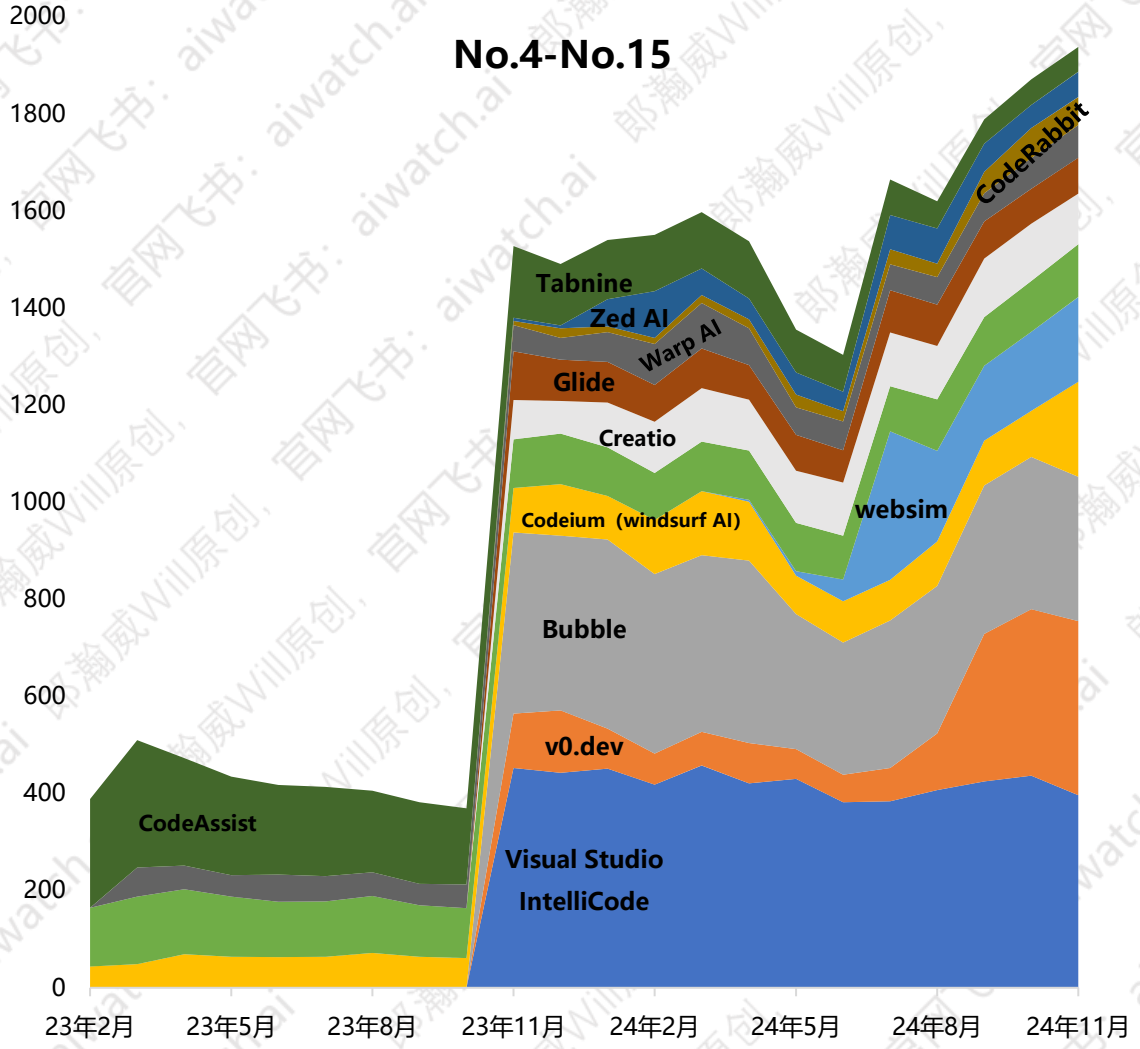
数据来源：similarweb 单位：万visit

编程助手 网页流量趋势 11月总量：3733万

- bolt.new和Cursor分别以644万和629万的访问量领跑市场，两者差距仅15万，竞争激烈，Cursor表现最为亮眼，年度增长率达14528%，显示出惊人的发展潜力。



- Visual Studio IntelliCode和v0.dev分别以397万和358万访问量形成稳定第二梯队，CodeRabbit和Tabnine虽然排名靠后，但获得A轮和B轮融资支持，发展潜力值得关注

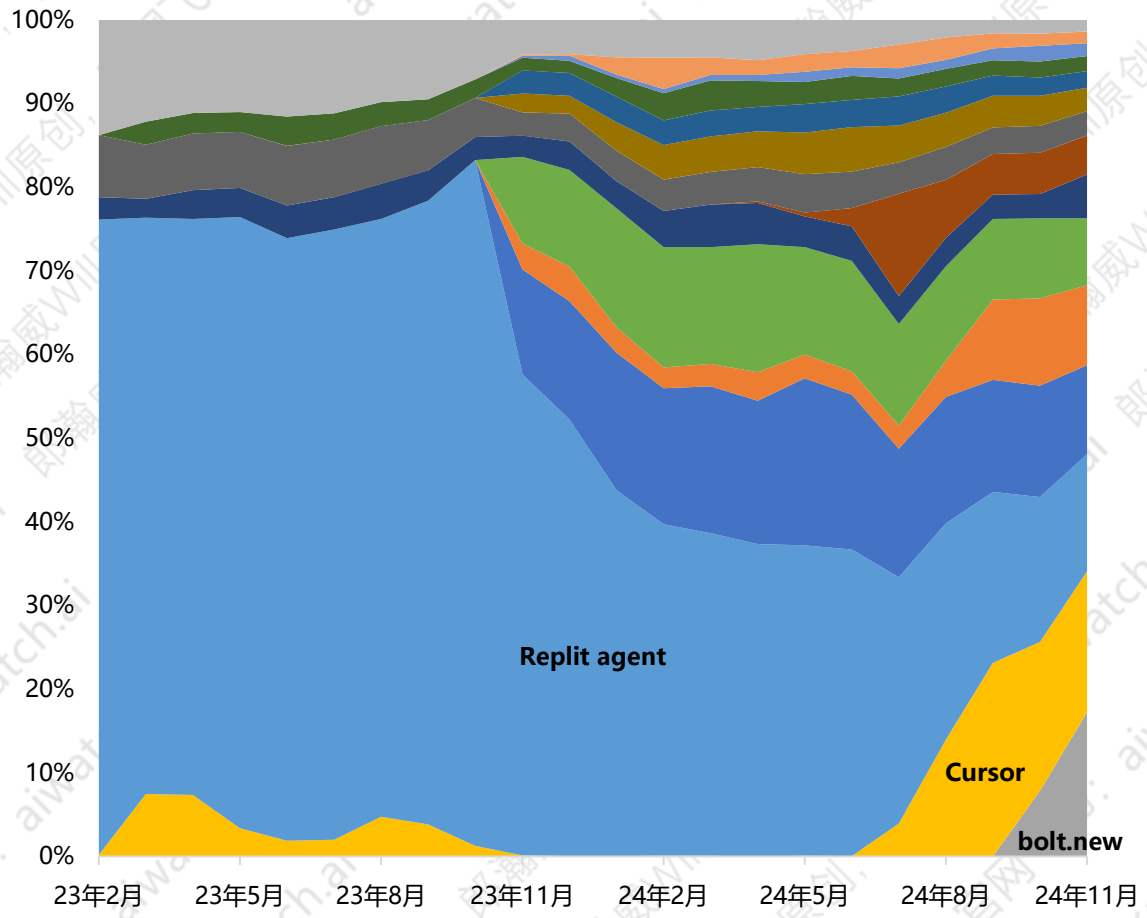


数据来源：similarweb 单位：万visit

编程助手 2023.2~2024.11 网页流量占比

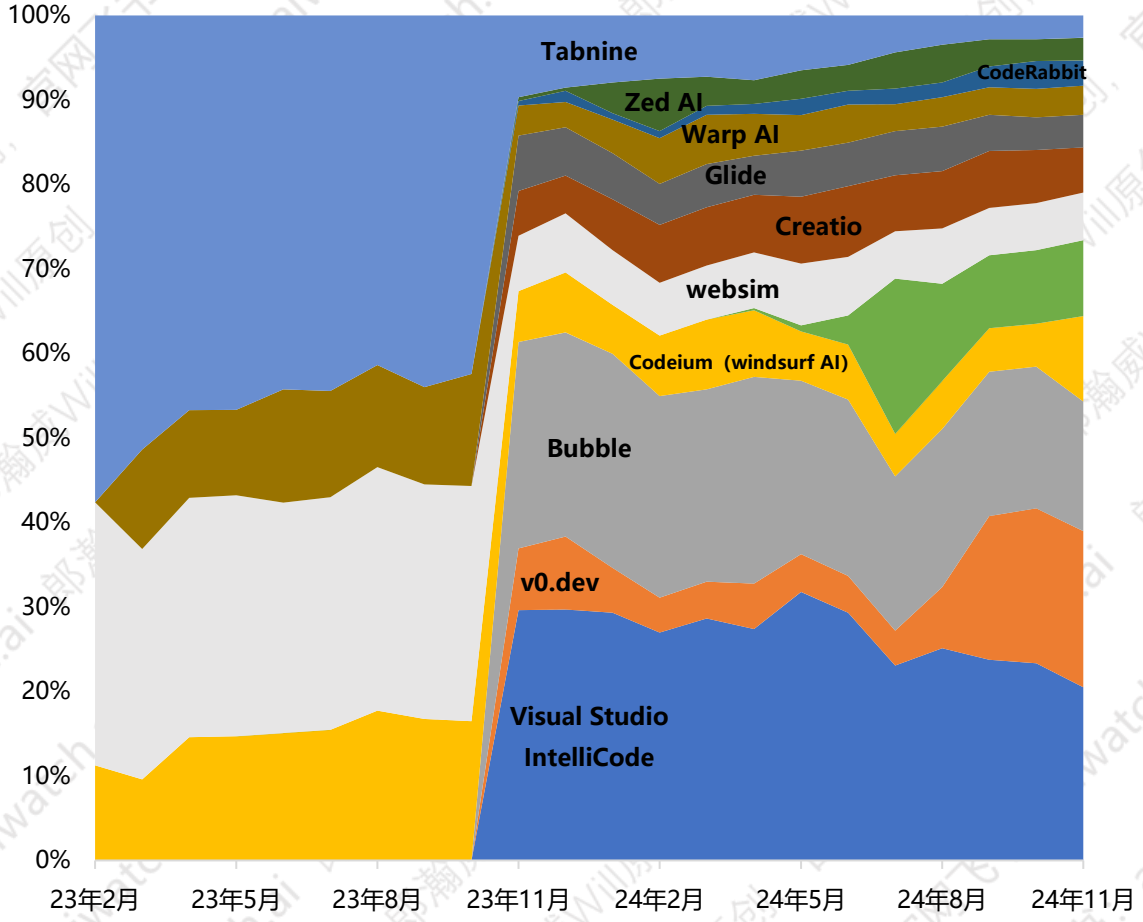
- Top15占比图显示最初是Replit agent高达70-80%一家独大，随后在24年中期市场出现动荡，Replit agent份额迅速下滑至40%左右，形成了三足鼎立(bolt.new、Cursor、Replit agent)的市场格局。

Top15占比



- No3-No15占比图反映了除头部企业外的其他玩家市场份额相对稳定，形成了Visual Studio IntelliCode、v0.dev和Bubble三家企业为主导的第二梯队竞争格局。

No.3-No.15占比



数据来源：similarweb 单位：万visit

编程助手 国际 | 国产 | 出海 Top10

国际

- bolt.new领跑(644万访问)，前十产品访问量均超百万

	产品名称	24年11月(万visit)
1	bolt.new	644
2	Cursor	629
3	Replit agent	522
4	Visual Studio IntelliCode	397
5	v0.dev	358
6	Bubble	297
7	Codeium（windsurf AI）	196
8	websim	174
9	CodeAssist	109
10	Creatio	104

国产

- 豆包MarsCode领先(79万访问)，其他产品规模较小

	产品名称	24年11月(万visit)
1	豆包MarsCode	79
2	CodeGeeX	14
3	文心快码 - Baidu Comate	11
4	代码小浣熊Raccoon	8
5	Fitten Code	5
6	CodeFuse	2
7	澜码科技	1
8	aiXcoder	1
9	讯飞星火飞码iFlyCode	1
10	imgcook.图像大厨	0.4

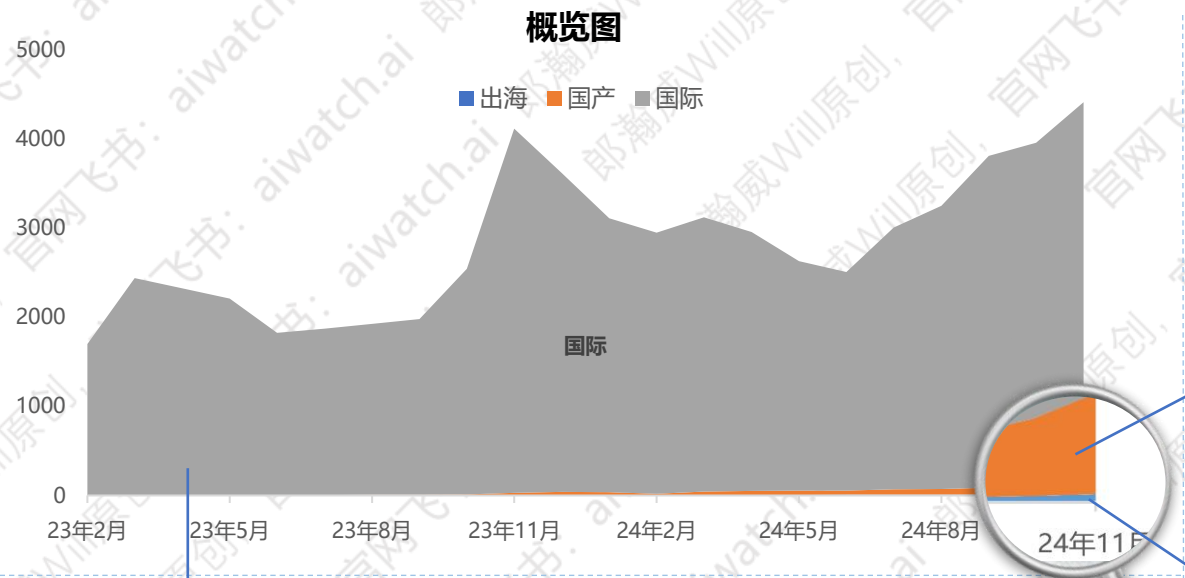
出海

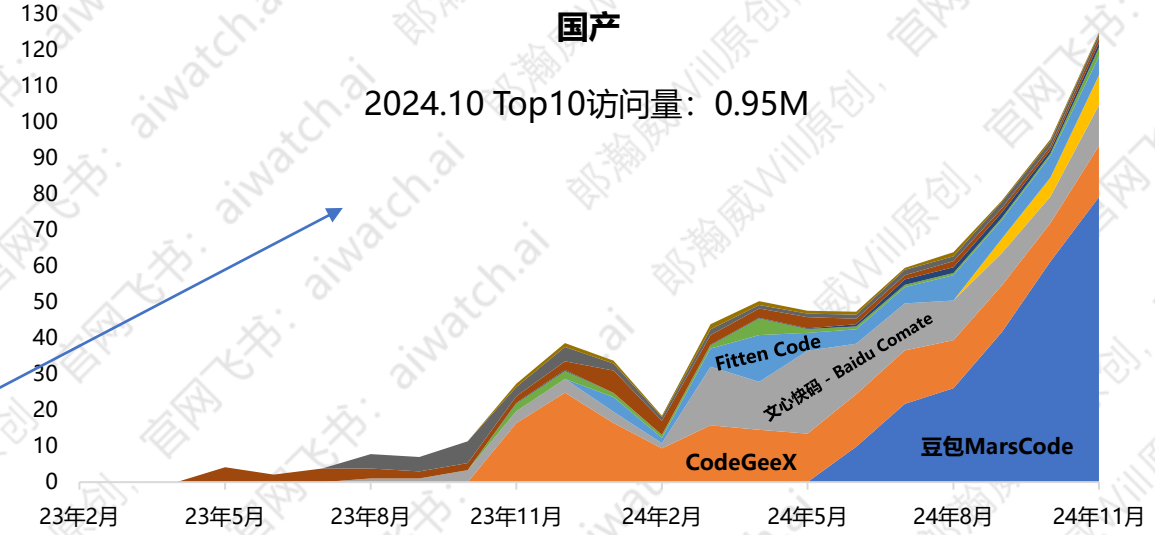
- 整体规模较小，豆包MarsCode(11万访问)暂居首位

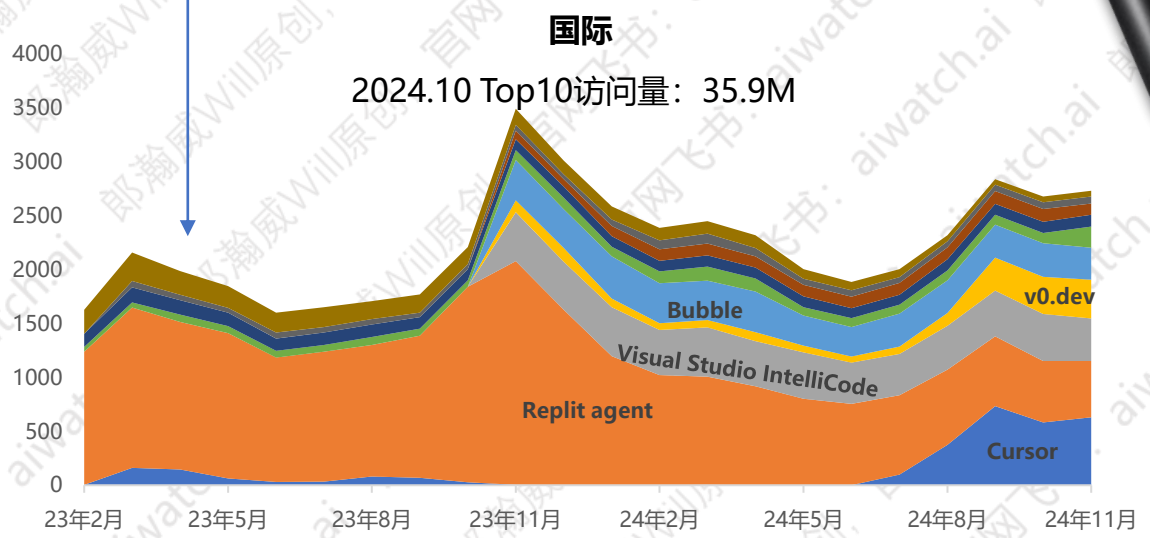
	产品名称	24年11月(万visit)
1	豆包MarsCode	11
2	OutlinePlus	-

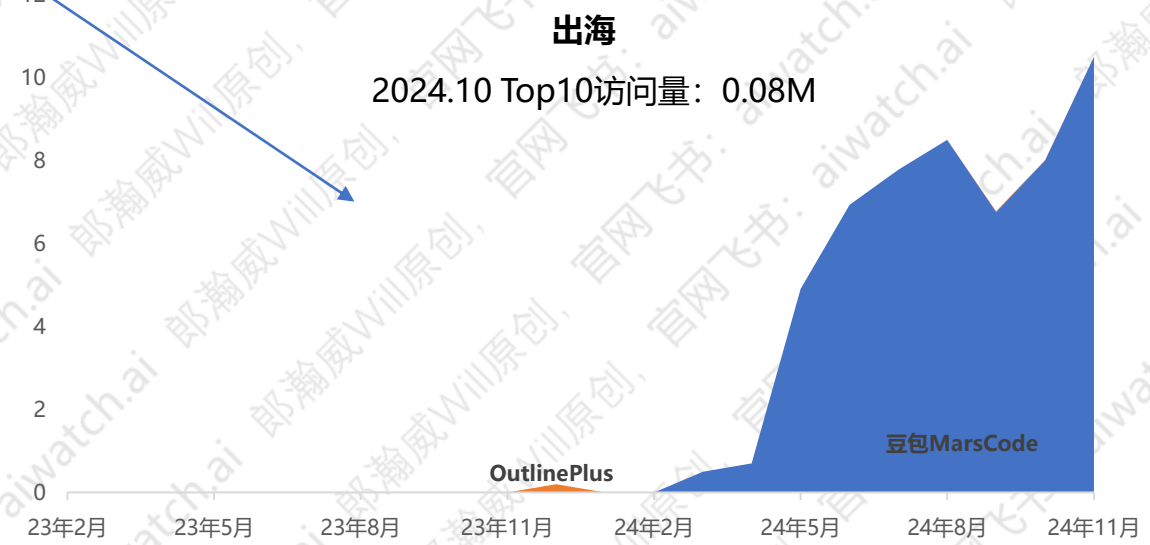
数据来源：similarweb 单位：万visit

编程助手 国际 99% | 国产 0.9% | 出海 0.1%



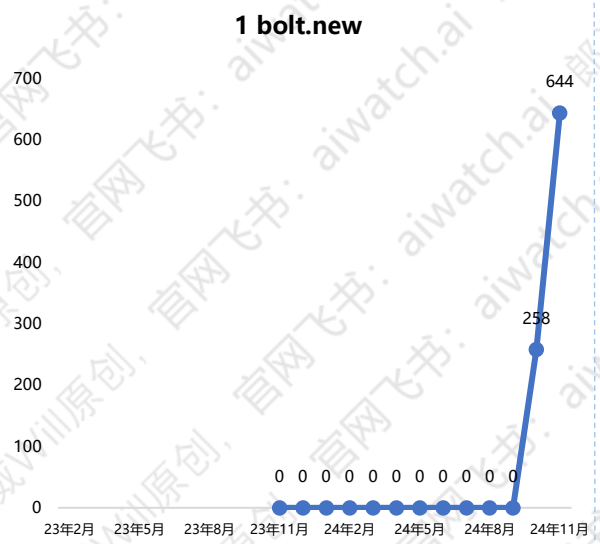


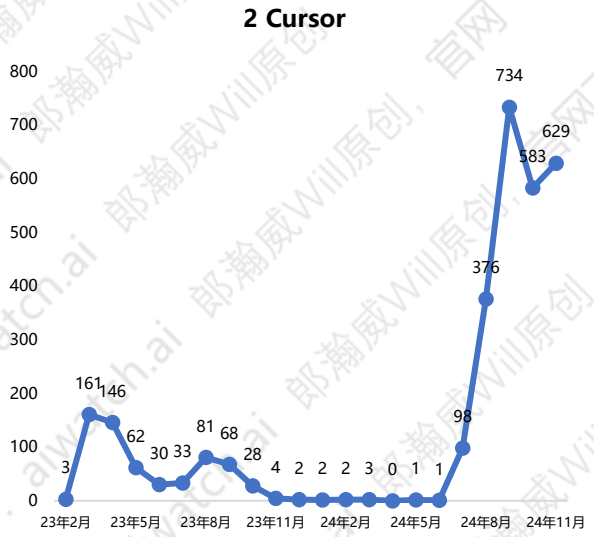


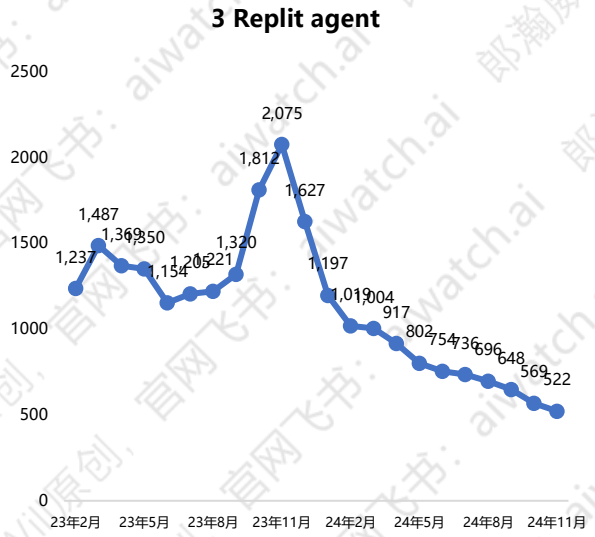


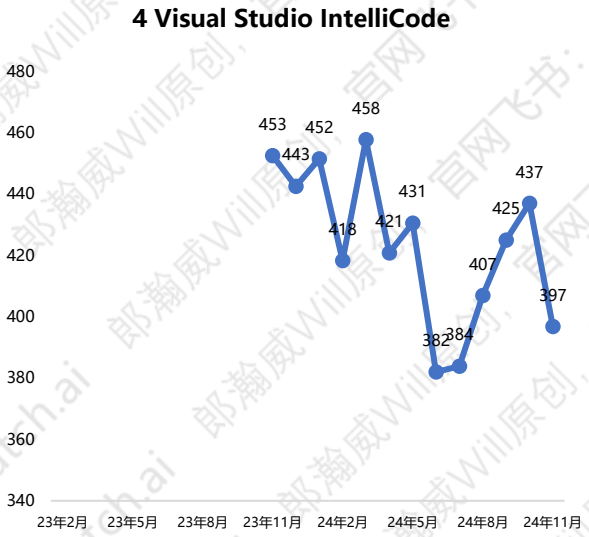
数据来源：similarweb 单位：万visit

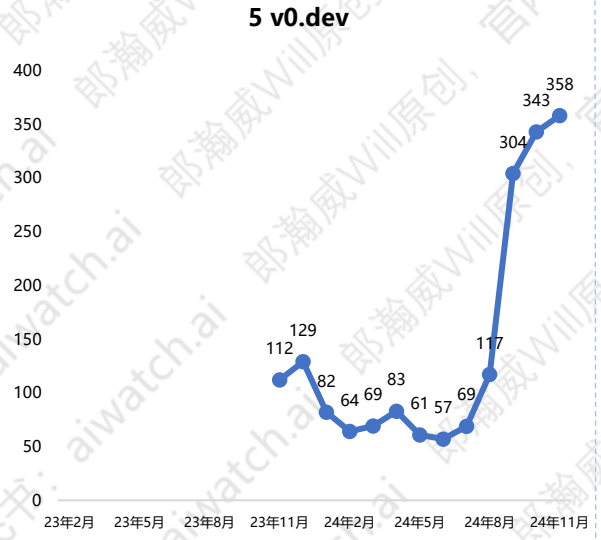
编程助手 No.1-No.8

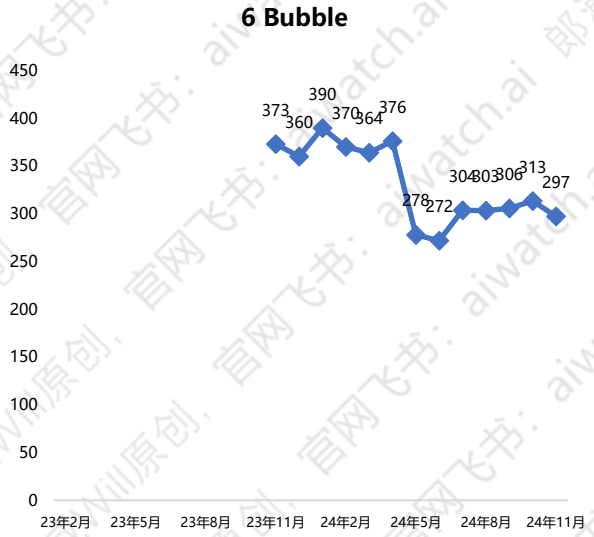


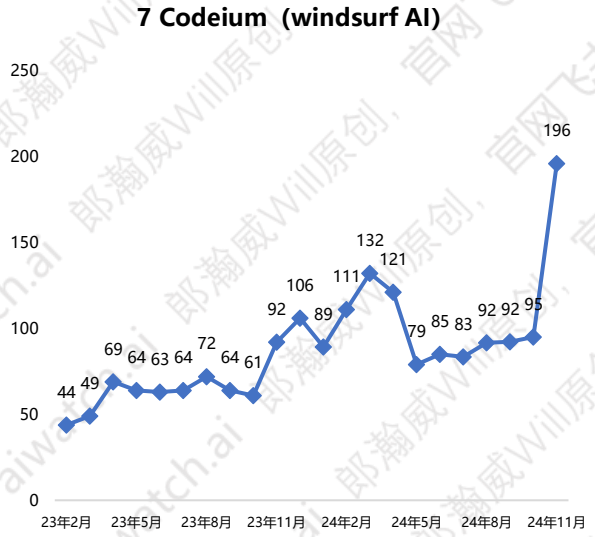


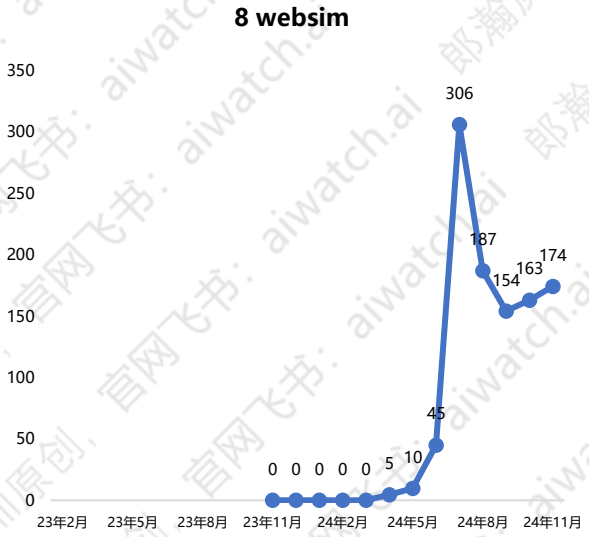






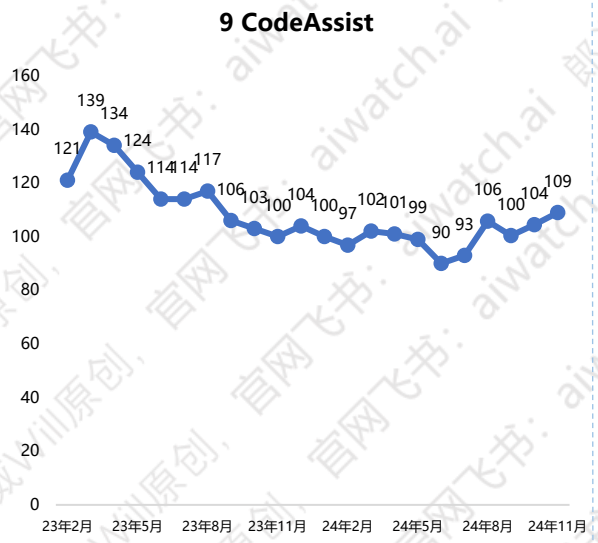


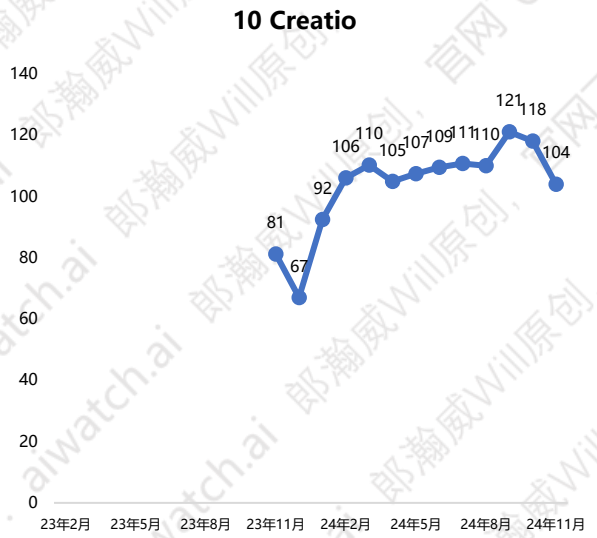


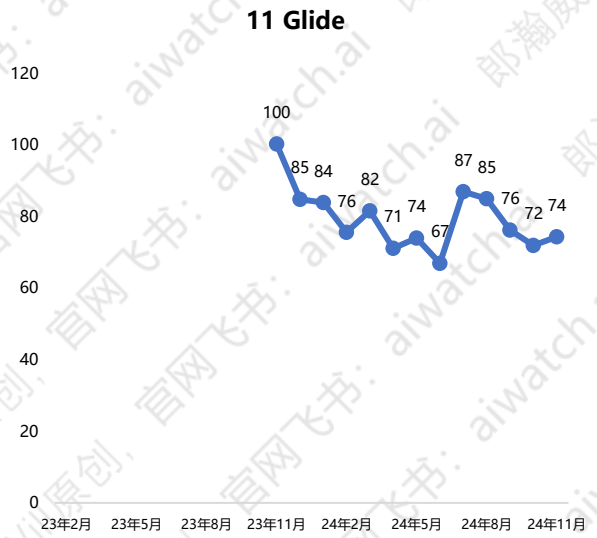


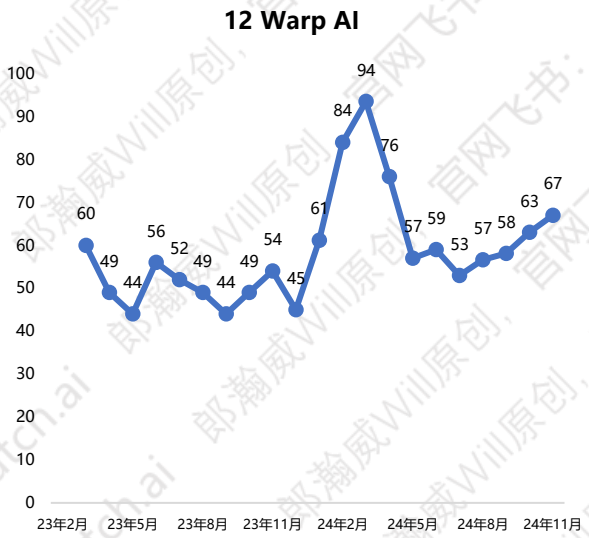
数据来源：similarweb 单位：万visit

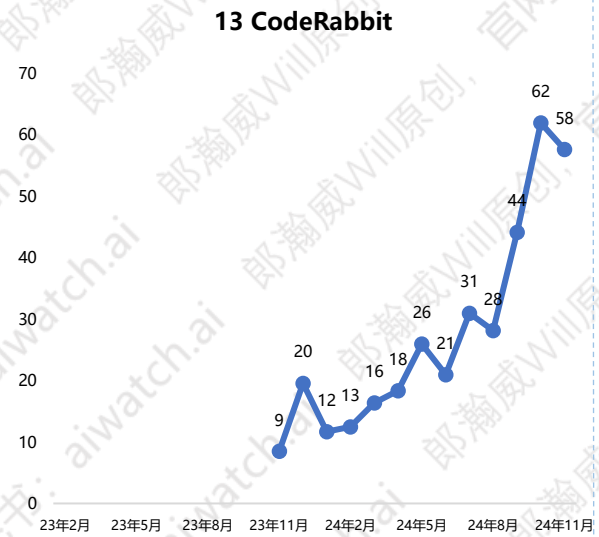
编程助手 No.9-No.16

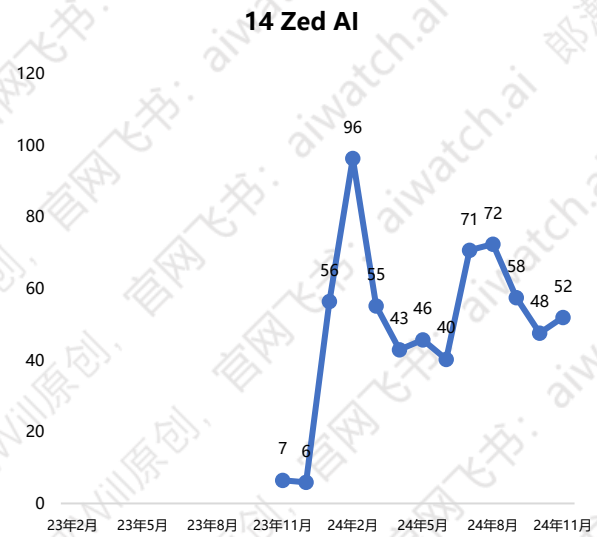


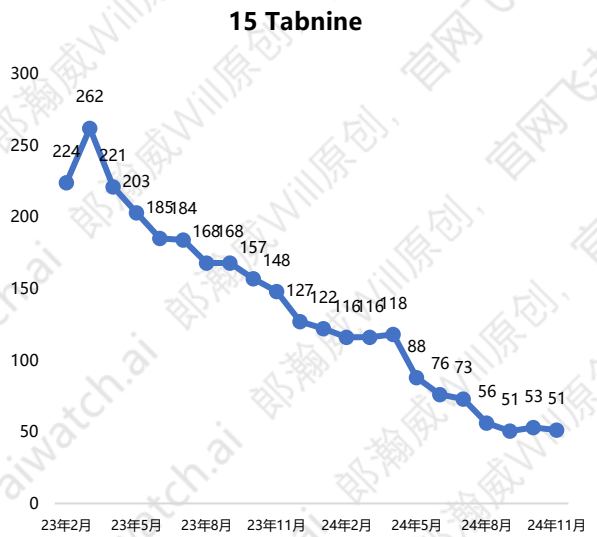


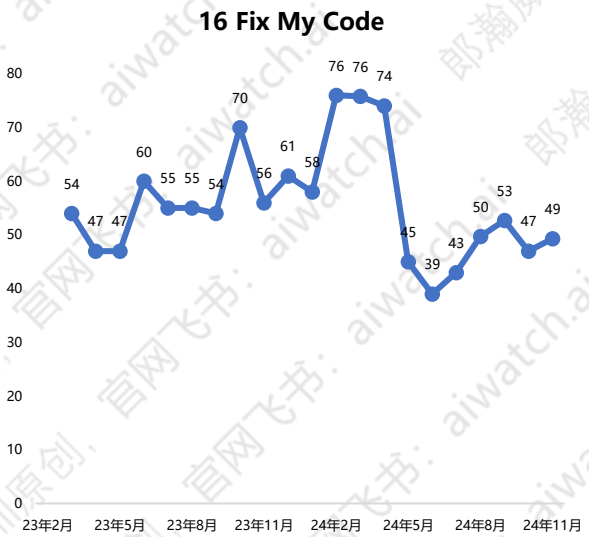








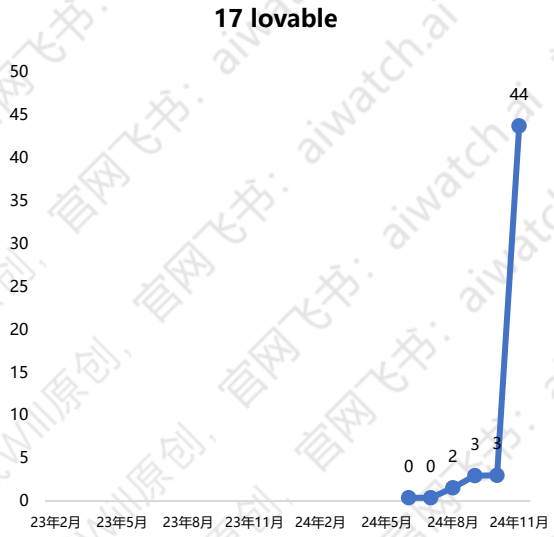


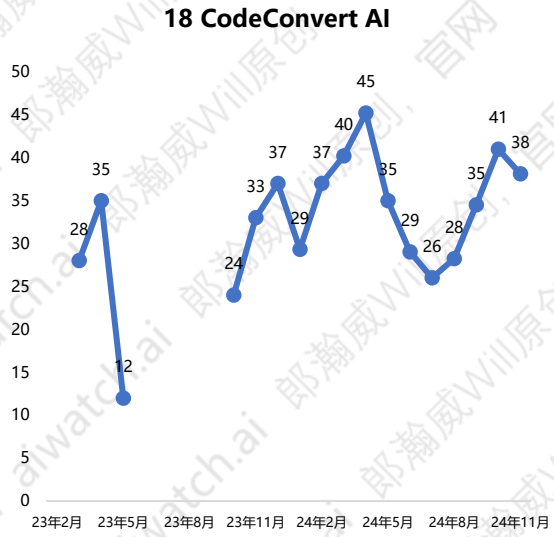


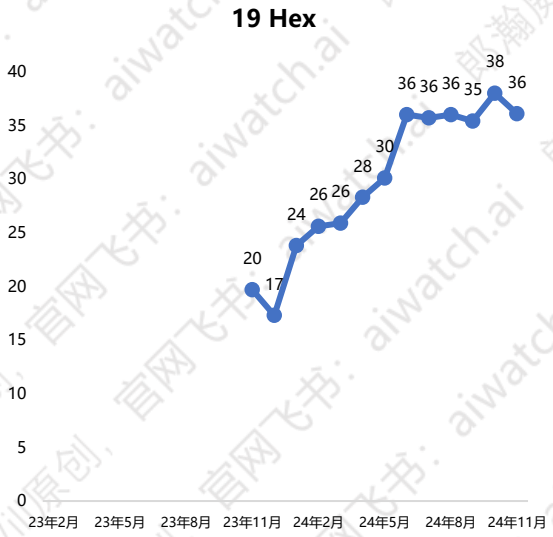
数据来源：similarweb 单位：万visit

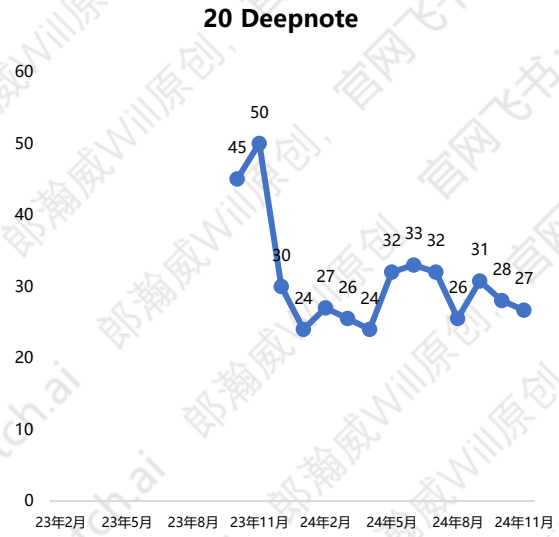
郎瀚威Will原创，官网飞书：aiwatch.ai

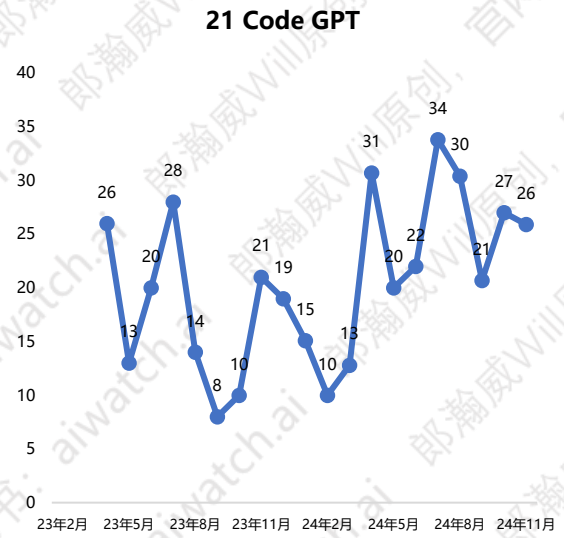
编程助手 No.17-No.24

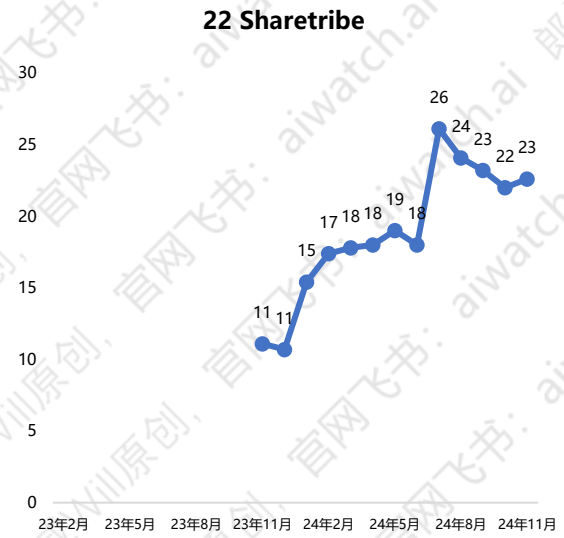


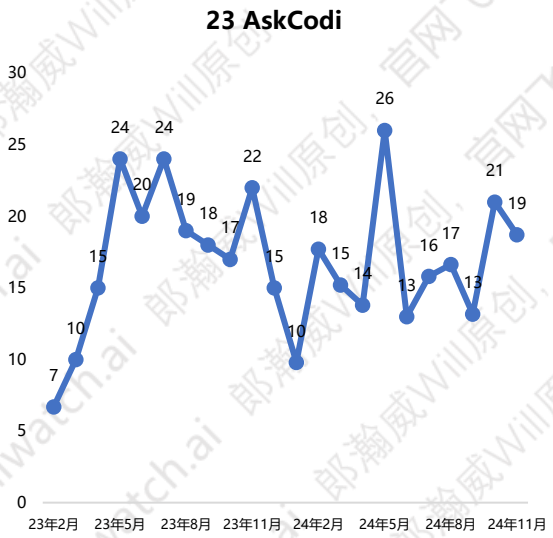


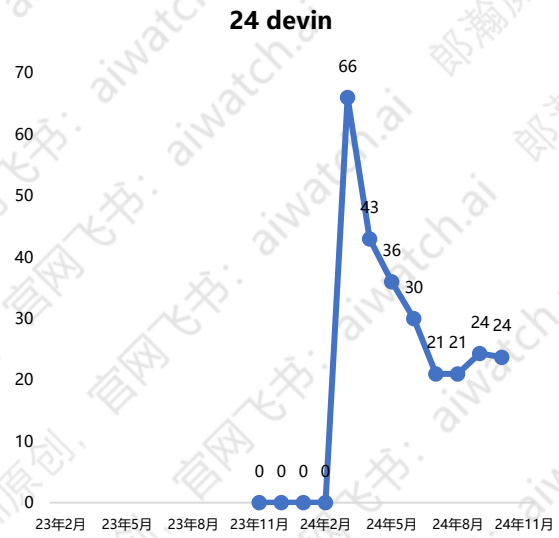






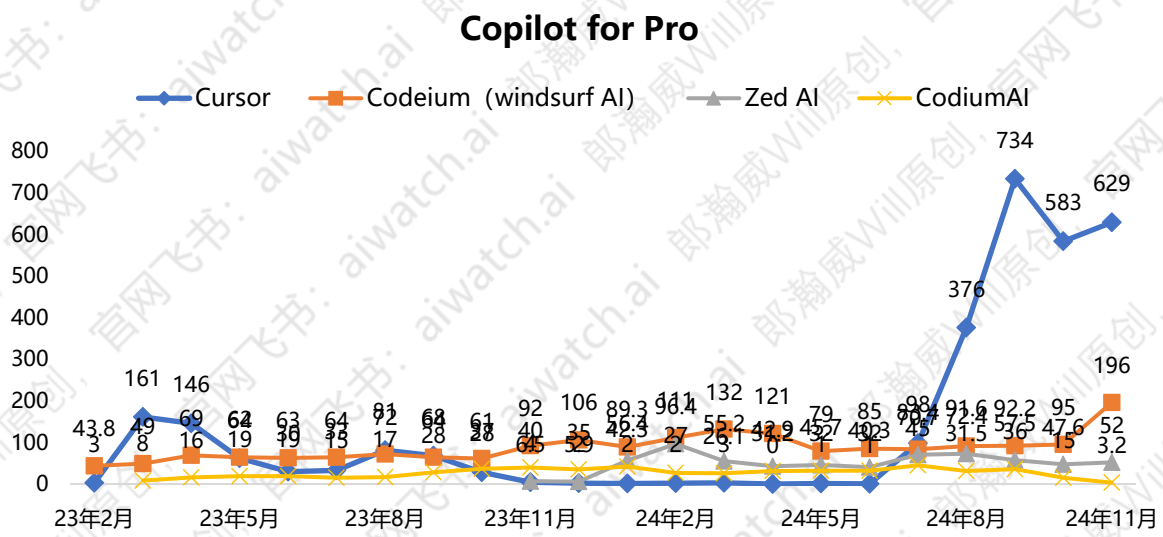


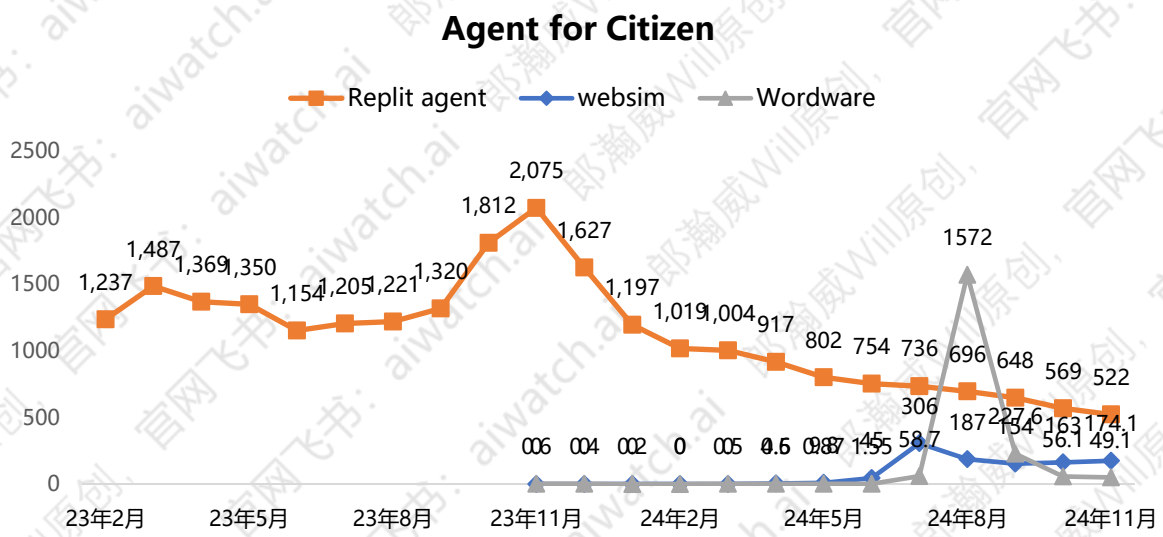


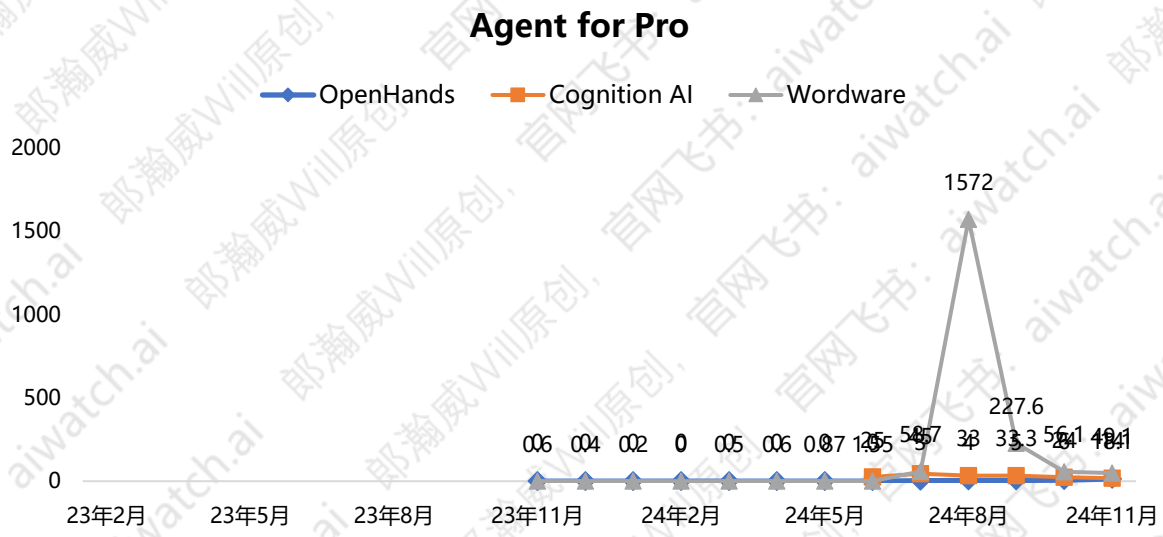


数据来源：similarweb 单位：万visit

编程助手 复合图表







数据来源：similarweb 单位：万visit

图生视频

图生视频

图生视频 – Takeaway

1. 2024年10月图生视频赛道TOP15总访问量达到7395万次访问。
2. KLING AI、Hailuo AI和Pika占据前三，月访问量分别为1340万、1145万和984万次，头部产品之间竞争激烈。
3. 增长方面，Luma AI和Pika表现最为亮眼，同比增长分别达到1099%和820%，显示了图生视频赛道正处于快速发展期。
4. 融资方面，六月以来Runway ML获得D轮4.5亿美元，Hailuo AI（MiniMax）获得B轮6亿美元，显示资本对长视频生成领域的关注度依然很高。
5. 从市场格局来看，美国和印度的产品占据主导，但中国产品如即梦AI Dreamina、可灵AI等也在快速追赶，逐步打开市场。
6. 值得关注的是，该赛道呈现明显的细分化趋势，比如Runway ML专注于专业视频创作，Pika则主打轻量级创作，各家企业正在寻找独特的市场定位。
7. 整体行业正朝着更加实用化的方向发展，从单纯的效果展示转向解决具体的商业场景需求，比如营销视频制作、产品展示等垂直领域。

数据来源：similarweb 单位：万visit

图生视频 - Top15

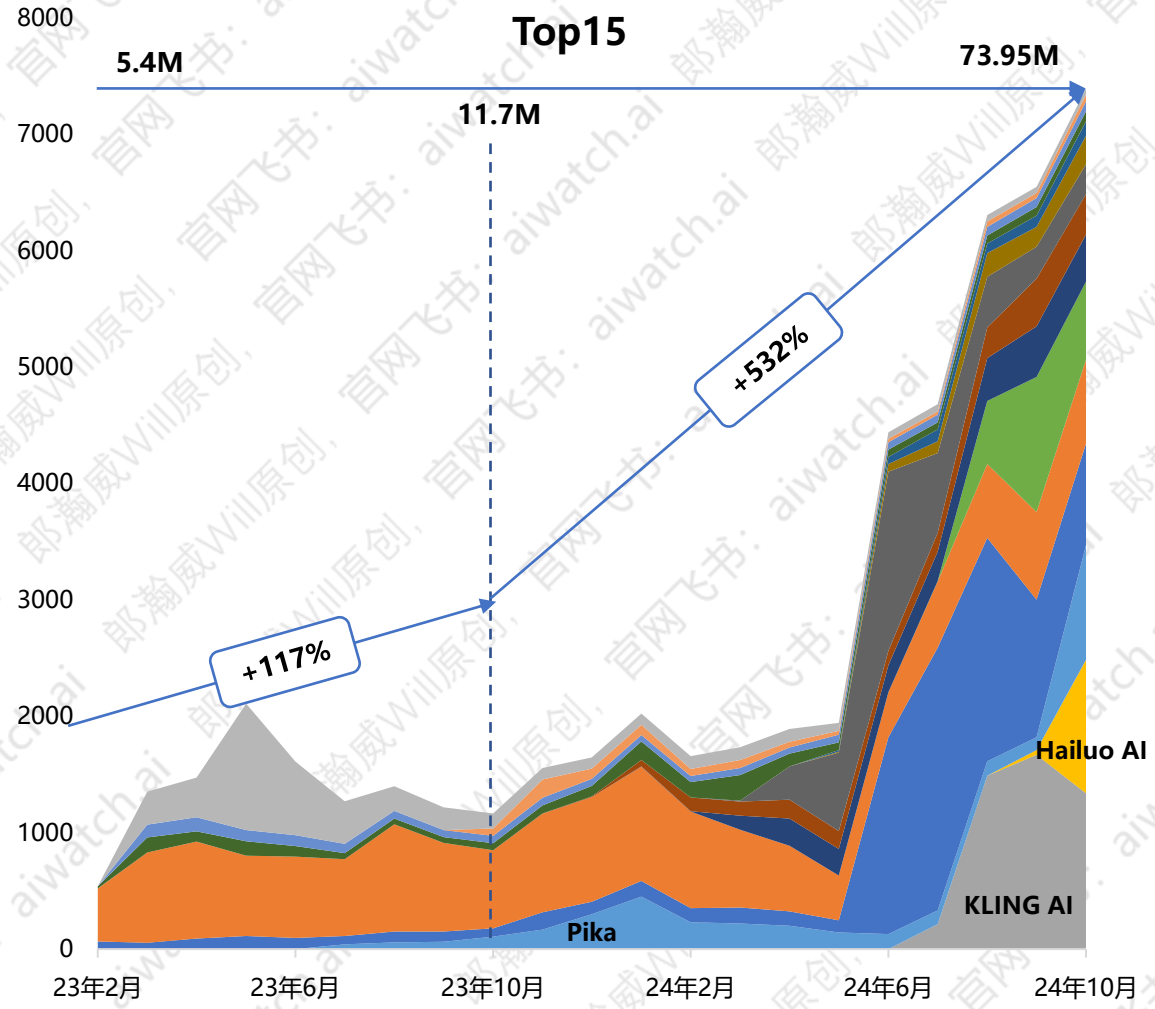
- **TOP15总融资额：7.98亿美元** (Hailuo AI (MiniMax 600M$)+Pika (Pika Labs 80M$)+Luma AI (Luma AI 43M$)+Haiper AI (Haiper 13.8M$)+Pixverse (爱诗科技 14M$)+Viggle (Viggle 18M$)+Genmo AI (Genmo 28.4M$)Decohere (Decohere 0.5M$=797.7M$)
- **Top15 总网页流量：7395万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	KLING AI		1,340	-	快手	-	-	-	-	United States	13%
2	Hailuo AI		1,145	-	MiniMax	B轮	2024/3/5	600	-	United States	20%
3	Pika	107	984	820%	Pika labs	B轮	2024/1/9	43	-	United States	8%
4	Luma AI	73	875	1099%	Luma AI	D轮	2024/7/2	450	-	United States	13%
5	Runway ML（Gen3）	671	721	7%	Runway ML	-	-	-	49	United States	15%
6	Vidu AI		672	-	生数科技	种子轮	2023/3/29	13.8	-	India	11%
7	Haiper AI	-	403	-	Haiper	A轮	2024/3/13	14	-	India	13%
8	Pixverse	-	348	-	爱诗科技	A轮	2024/8/26	18	-	United States	12%
9	Viggle		257	-	Viggle	-	-	-	-	United States	22%
10	vivago.ai		245	-	VIVA	-	-	-	-	Russian Federation	18%
11	即梦AI Dreamina		123	-	字节	-	-	-	-	China	86%
12	Lumen5	64	86	34%	Lumen5	-	-	-	-	India	10%
13	Genmo AI	58	86	48%	Genmo	A轮	45587	28.4		United States	15%
14	Lensgo	63	56	-11%	超智能科	预种子轮	2023/4/5	0.5	-	India	27%
15	Kaiber AI	131	54	-59%	Kaiber AI	-	-	-	-	United States	20%

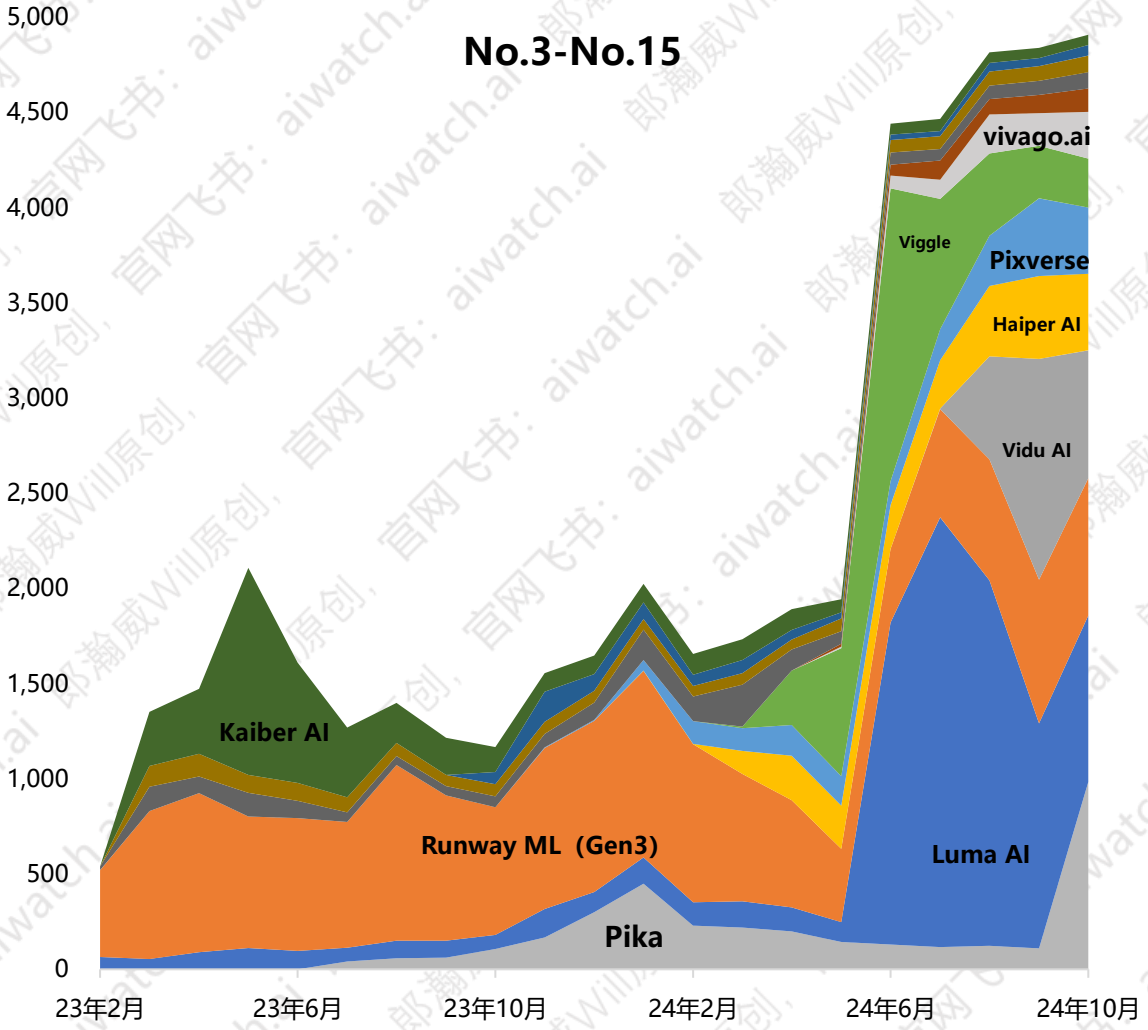
数据来源：similarweb 单位：万visit

图生视频　网页流量趋势 10月总量：7395万

- KLING AI和Hailuo AI形成了第一梯队，特别是在24年6月后，头部企业集中发力，带动整体市场规模快速提升，显示出赛道的强劲增长势头。



- 在第3-15名的竞争格局中，Pika和Luma AI表现亮眼，分别以984万和875万的月访问量快速崛起，增长率均超过800%。Runway ML作为老牌玩家保持稳定增长，而新进入者如Viggle、Pixverse等也在快速追赶，竞争愈发激烈。



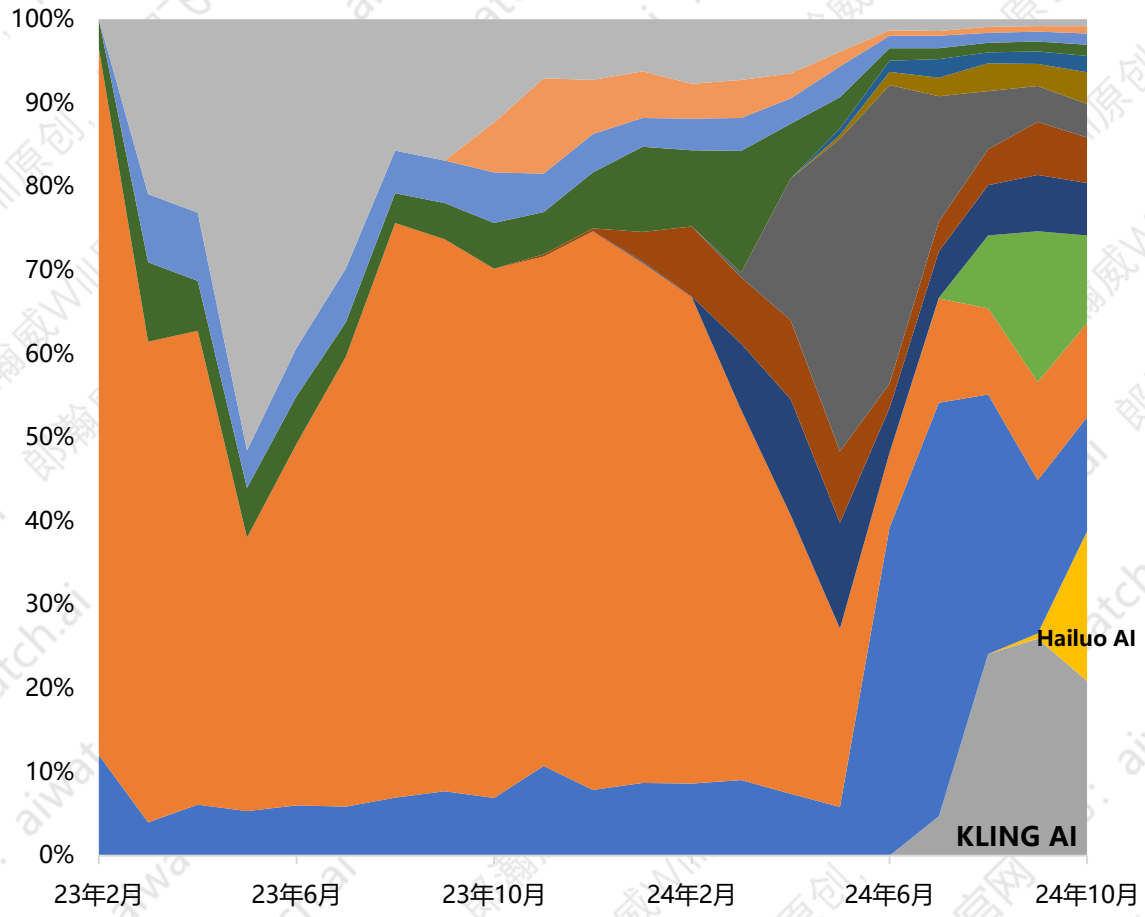
数据来源：similarweb　单位：万visit

图生视频 2023.2~2024.10 网页流量占比

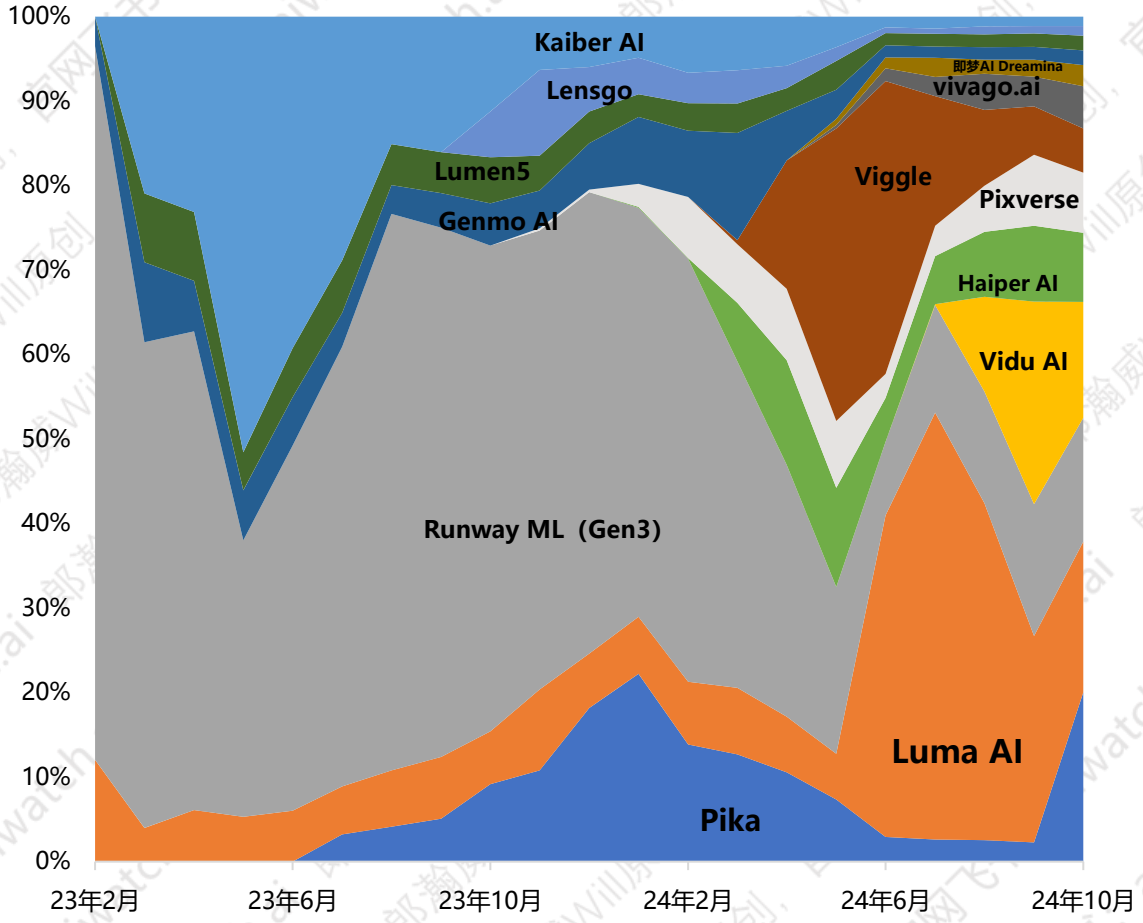
- Top15占比分析：KLING AI的市场份额从24年6月开始显著提升，但Hailuo AI的快速增长使得头部竞争更趋激烈。整体市场份额分布更趋均衡，头部效应有所减弱。

- 3-15名占比分析：Pika和Luma AI异军突起，成为第二梯队的新领军者，带动整个梯队快速成长。Runway ML虽份额有所下降，但仍保持稳定地位，第二梯队整体呈现百花齐放之势。

Top15占比



No.3-No.15占比



数据来源：similarweb 单位：万visit

图生视频 国际 | 国产 | 出海 Top10

国际

- Pika领跑(984万访问)，Luma AI、Runway ML紧随，竞争激烈

序号	产品名称	24年10月(万visit)
1	Pika	984
2	Luma AI	875
3	Runway ML（Gen3）	721
4	Viggle	257
5	Genmo AI	86
6	Lumen5	86
7	Kaiber AI	54
8	Decohere	49
9	Domo AI	44
10	AI Logo Reveals	31

国产

- 即梦AI Dreamina独大(123万访问)，整体规模待提升

序号	产品名称	24年10月(万visit)
1	即梦AI Dreamina	123
2	可灵 AI	19
3	跃问视频（内测）	7.3
4	书生·筑梦	0
5	Pixeling	-

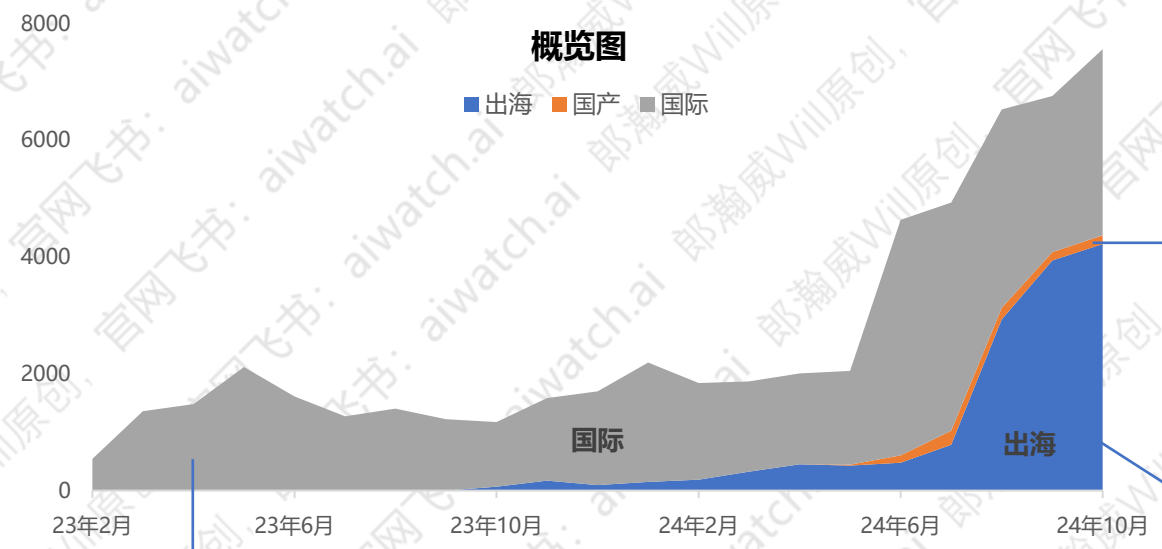
出海

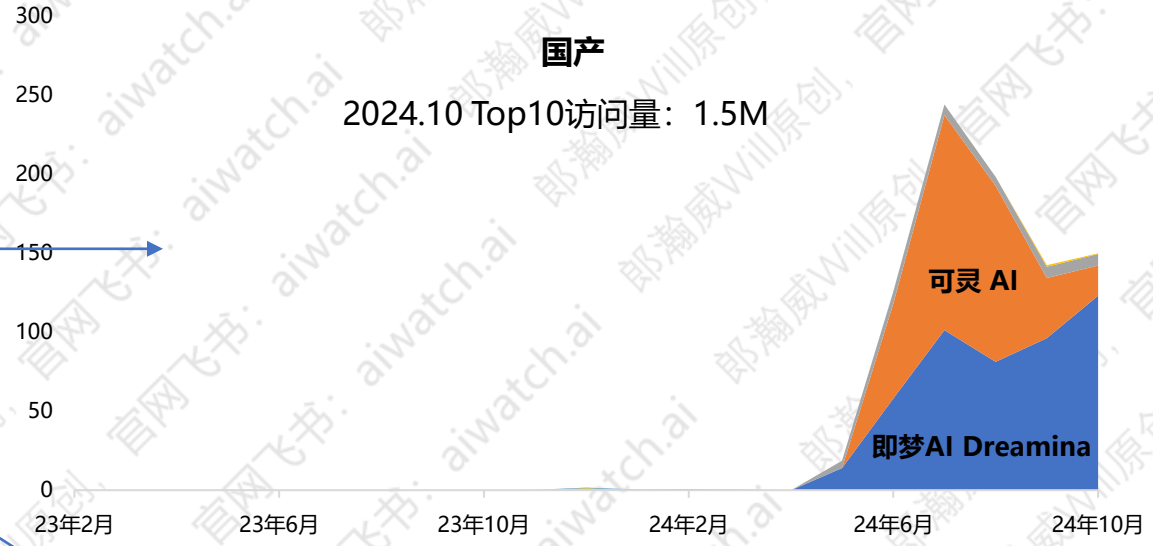
- KLING AI表现最佳(1340万访问)，Hailuo AI紧随其后(1145万访问)

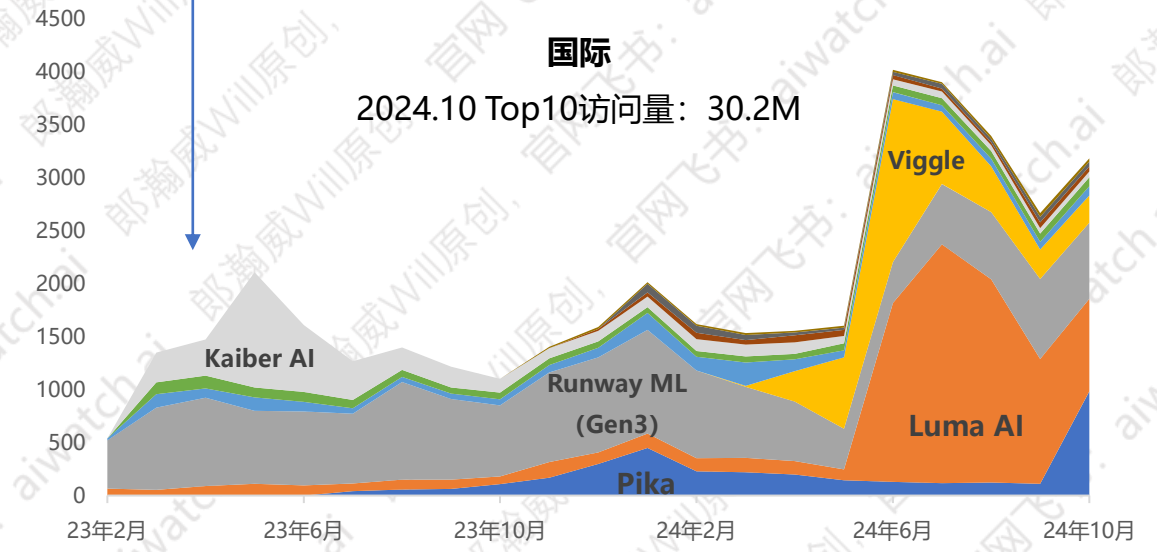
序号	产品名称	24年10月(万visit)
1	KLING AI	1,340
2	Hailuo AI	1,145
3	Vidu AI	672
4	Haiper AI	403
5	Pixverse	348
6	vivago.ai	245
7	Lensgo	56
8	Morph Studio	14
9	Stable Video Diffusion	-

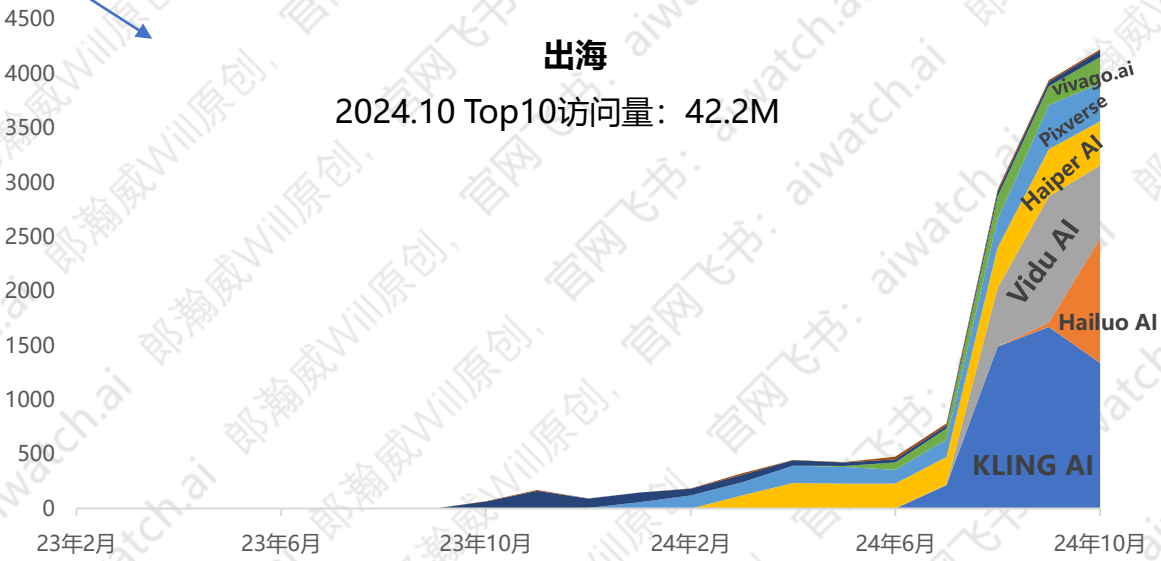
数据来源：similarweb 单位：万visit

图生视频 国际 78% | 国产 1% | 出海 21%



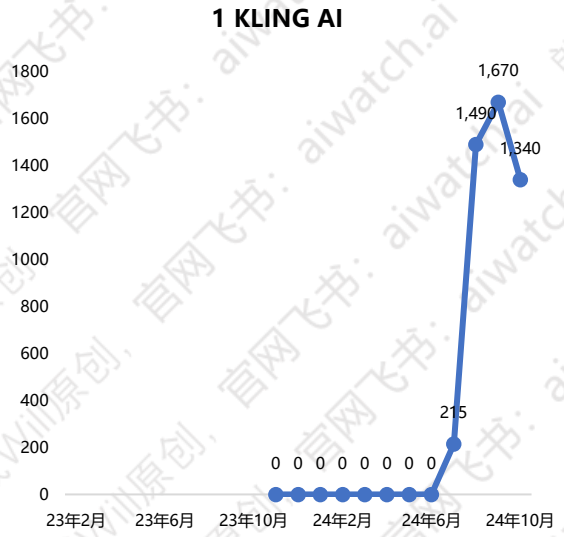


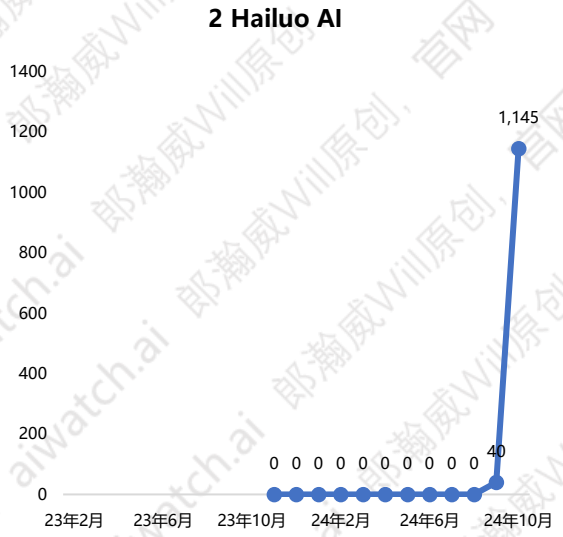


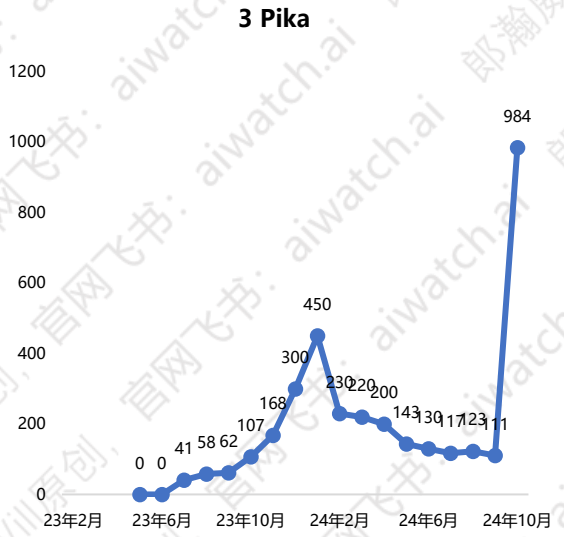


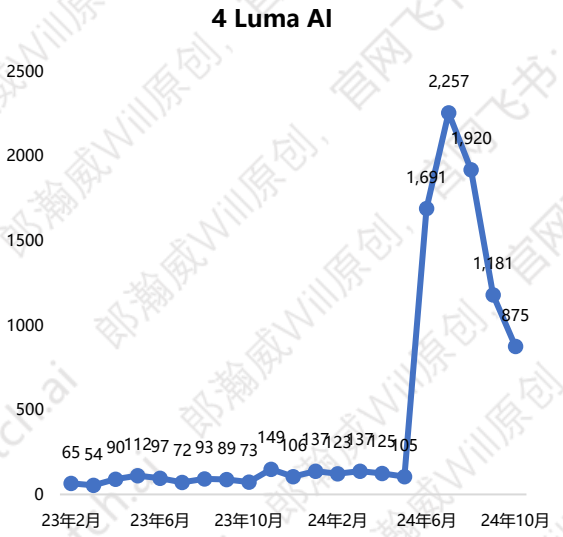
数据来源：similarweb 单位：万visit

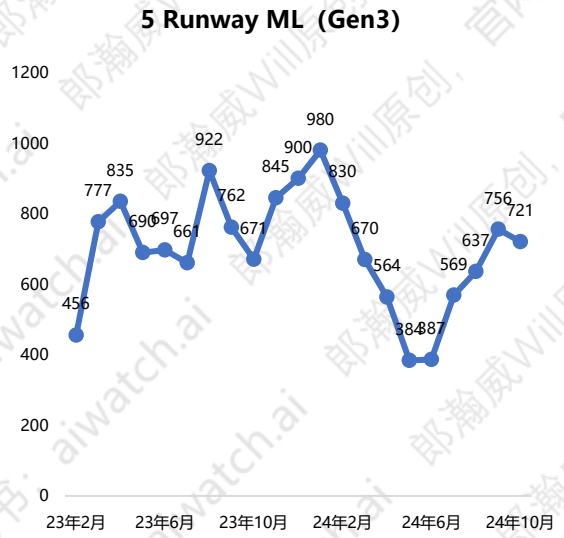
图生视频 No.1-No.8

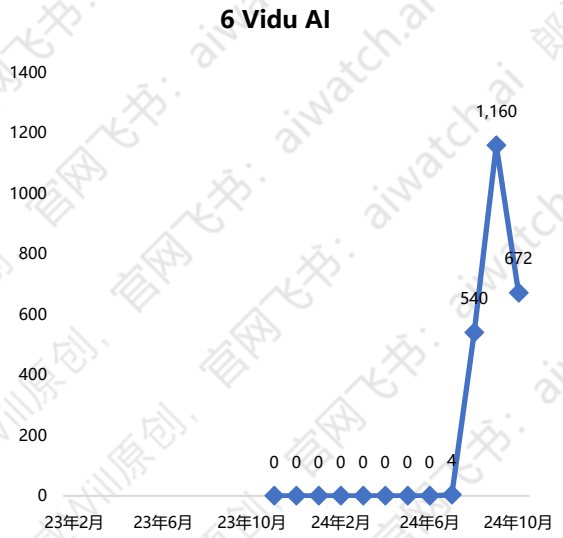


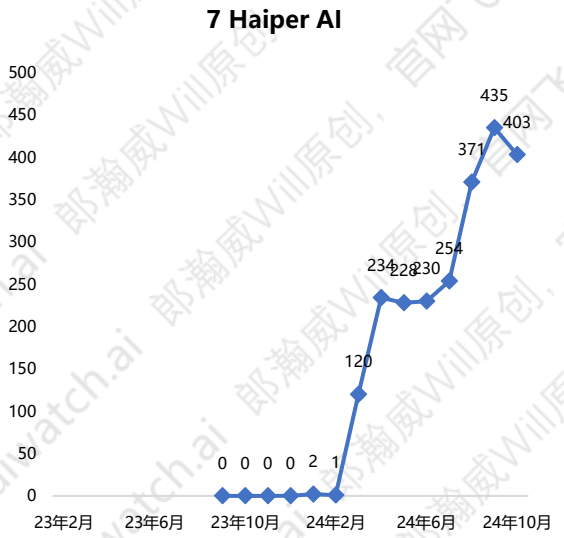


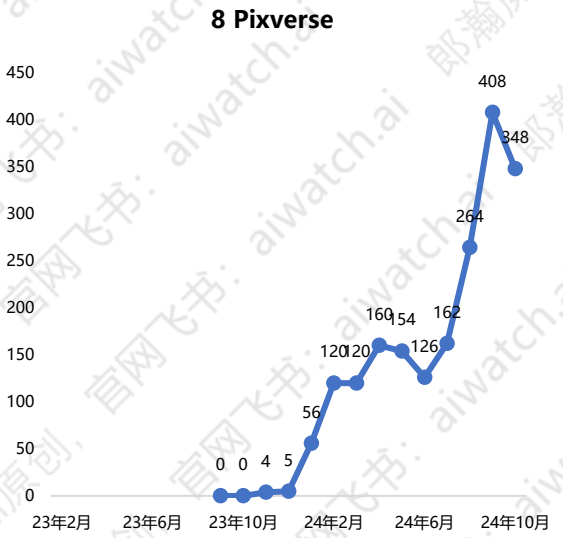






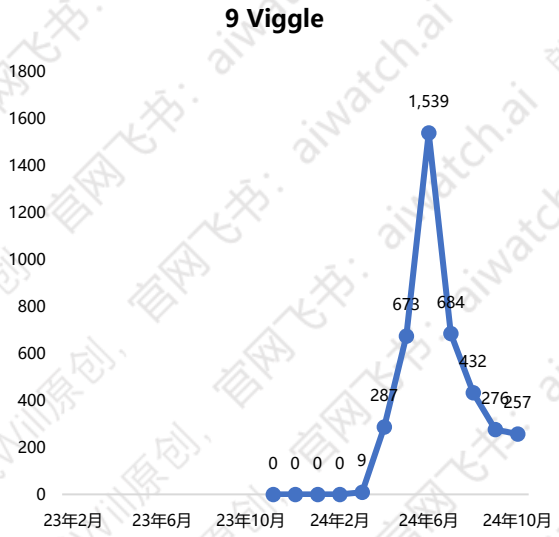


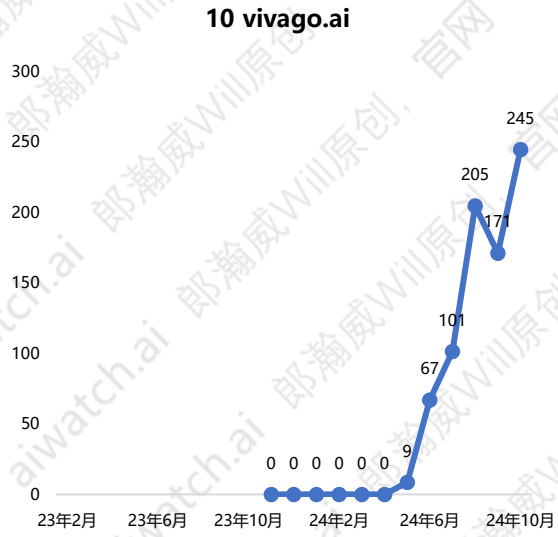


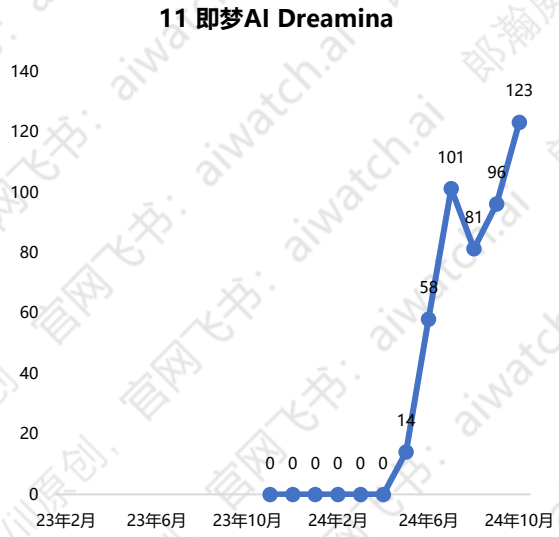


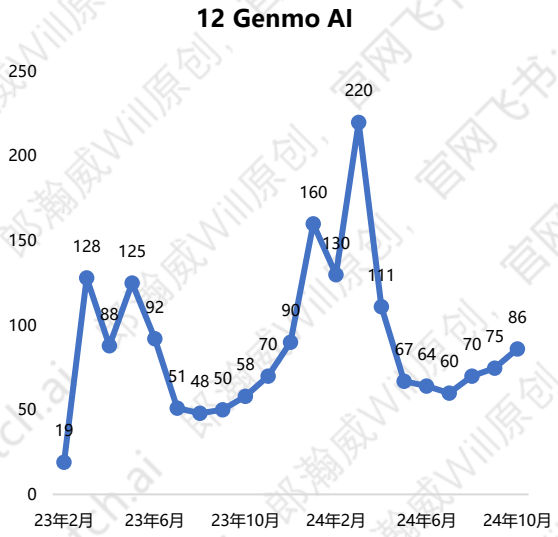
数据来源：similarweb 单位：万visit

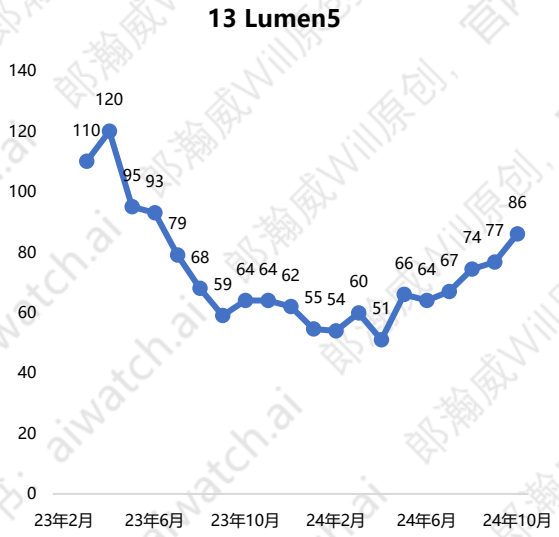
图生视频 No.9-No.16

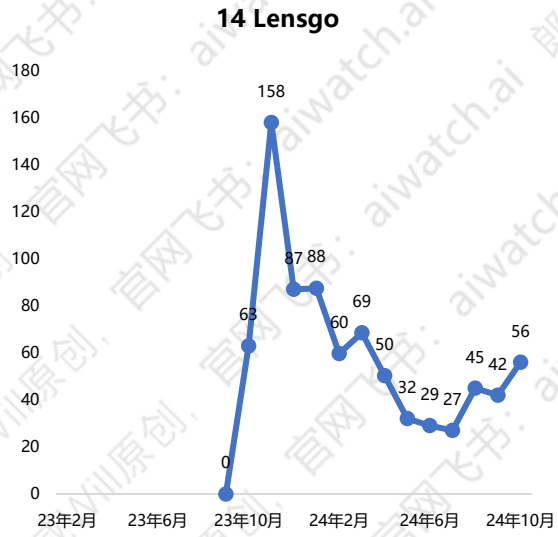


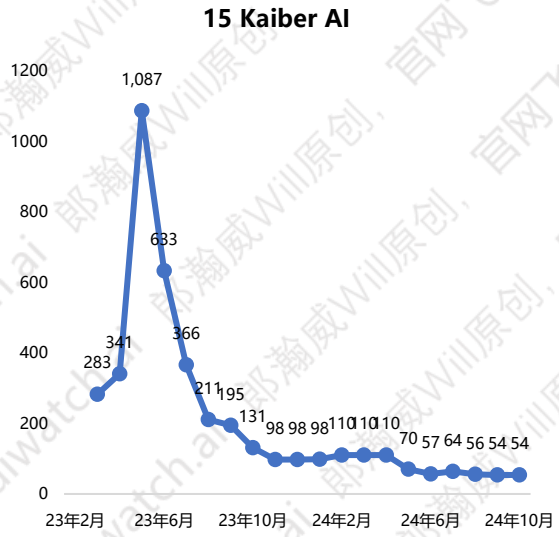


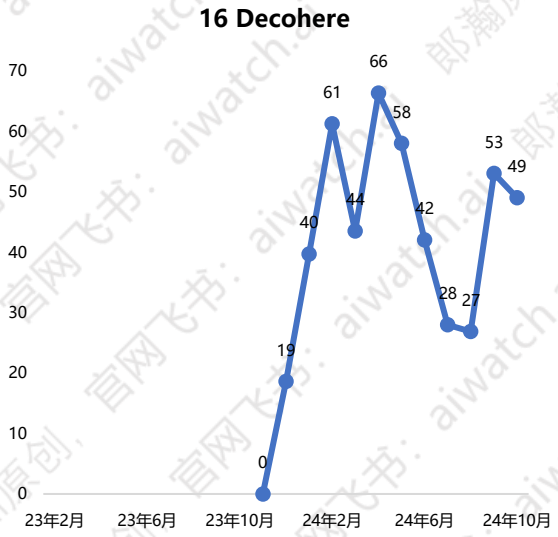








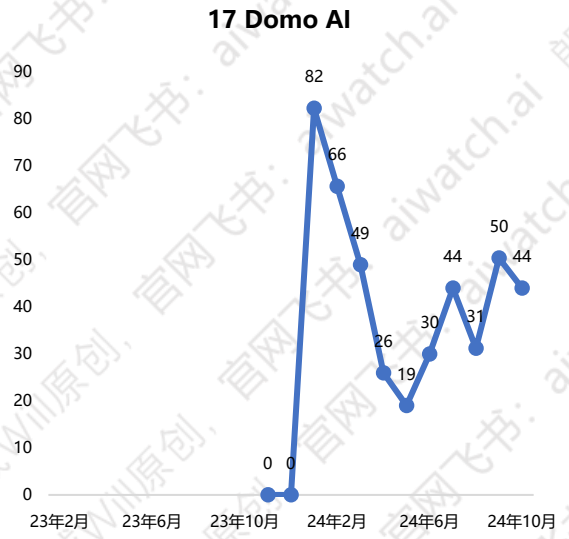


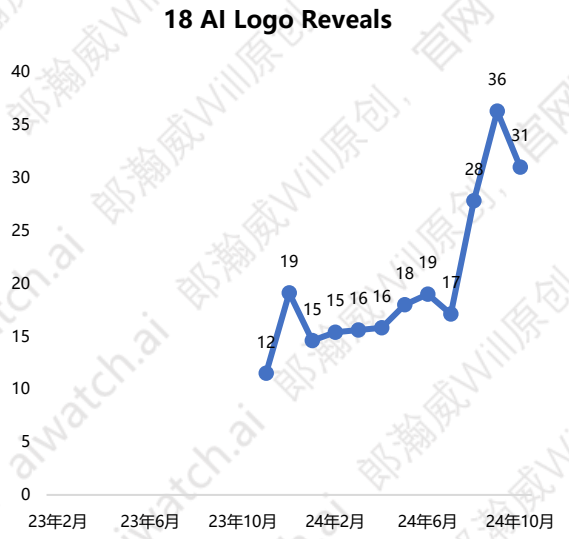


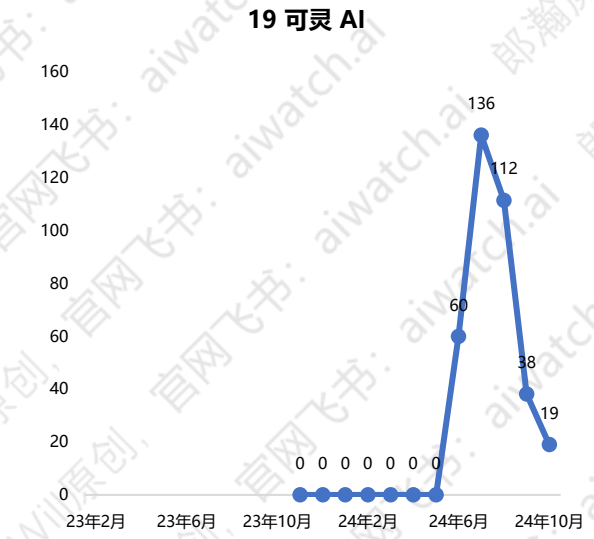
数据来源：similarweb 单位：万visit

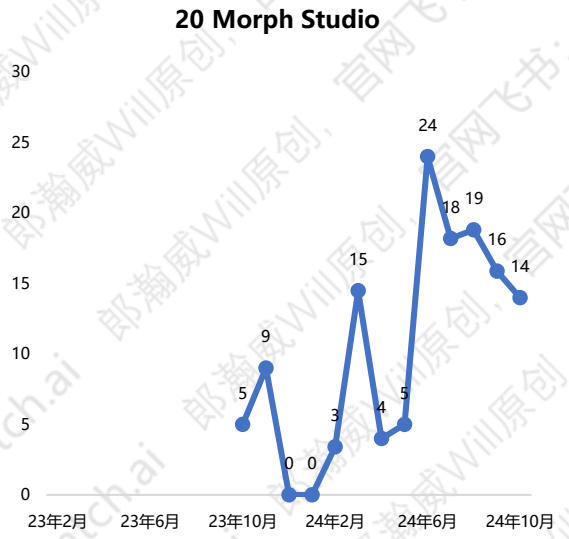
官网飞书：aiwatch.ai 郎瀚威Will原创

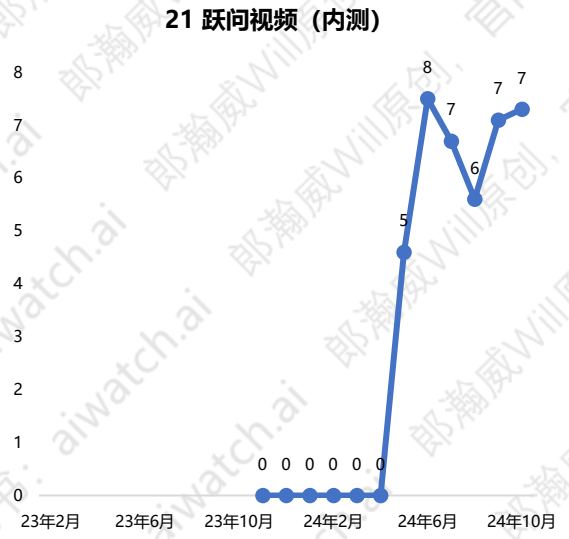
图生视频 复合图表

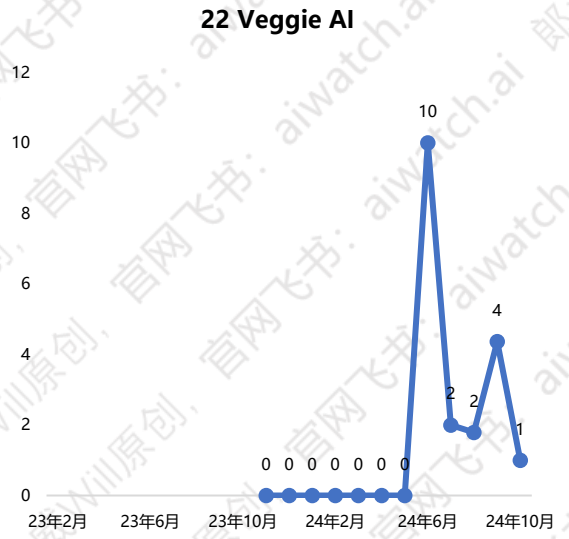


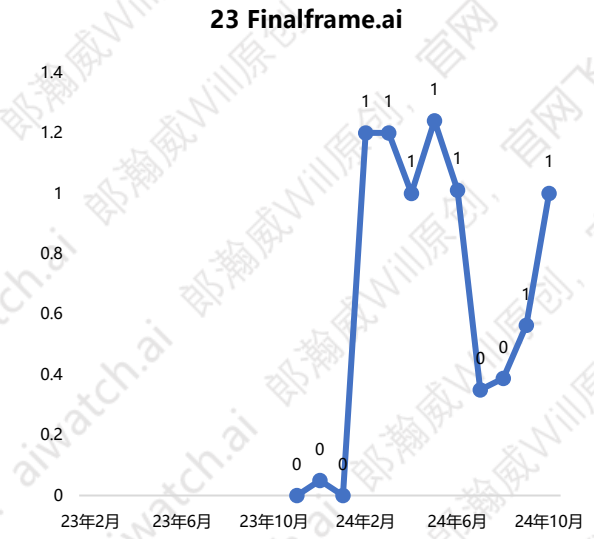


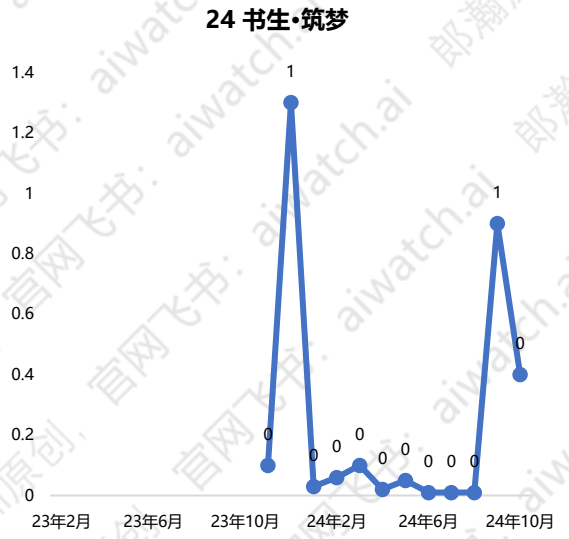






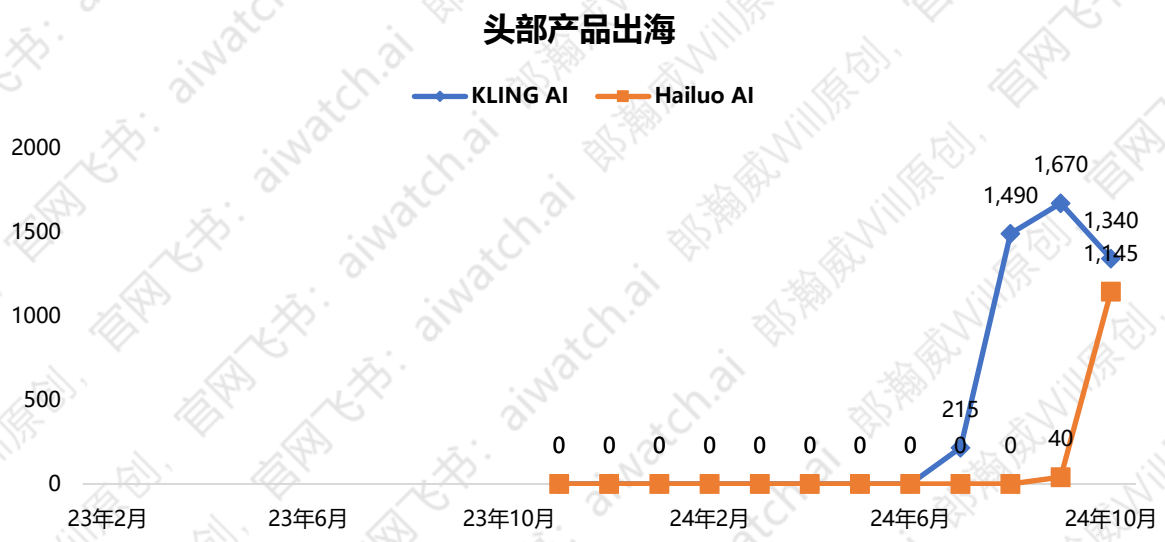


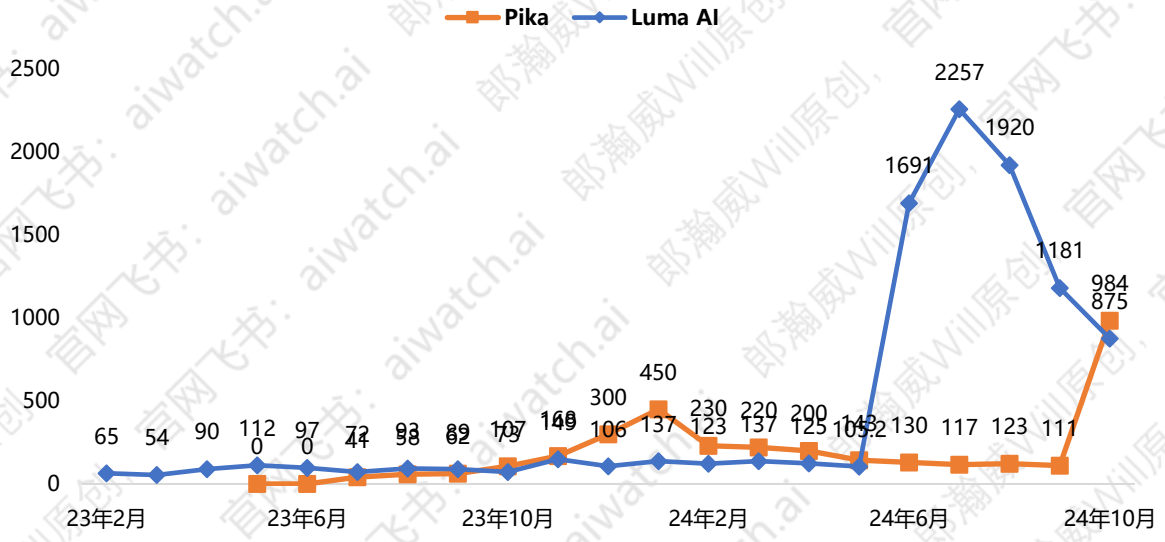


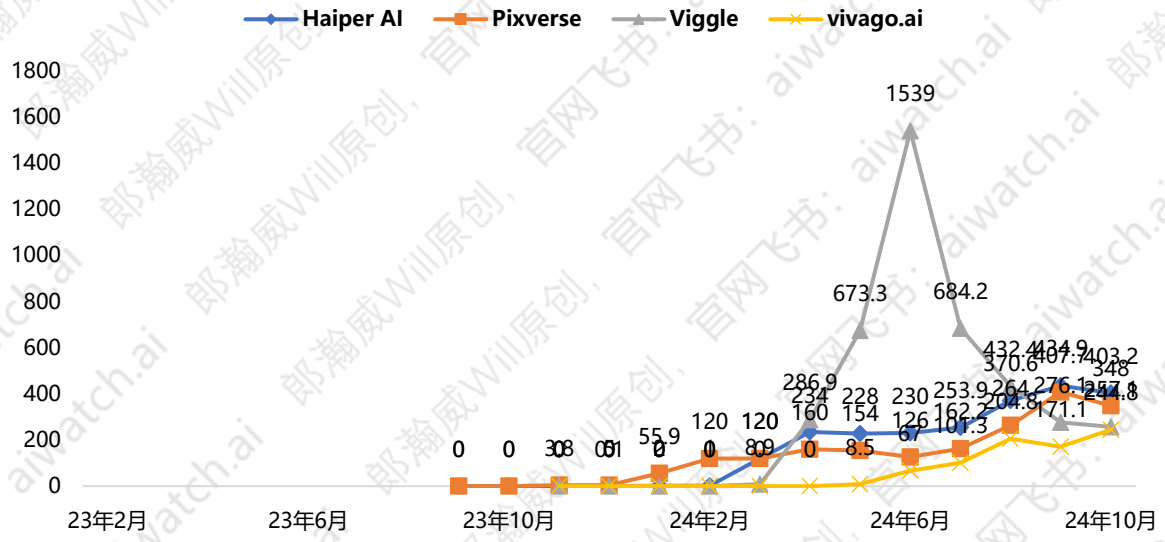


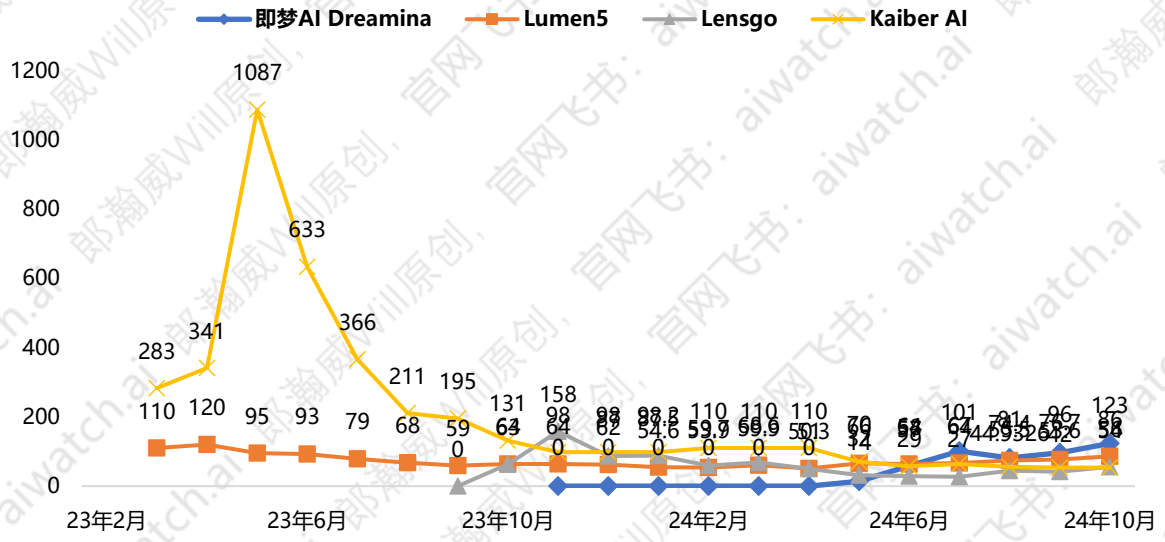
数据来源：similarweb 单位：万visit

图生视频 复合图表









数据来源：similarweb 单位：万visit

语言教育

语言教育

语言教育 - Takeaway

1. 2024年10月语言教育赛道TOP15产品总访问量达9887万次，环比保持稳定增长。
2. 行业第一梯队由Duolingo、Preply和Busuu构成，分别以6681万、1738万和360万月访问量领跑市场。
3. 整体行业呈现增长趋势，其中Duolingo的增长尤为显著。
4. 融资方面，2023-2024年间共有5笔融资事件，包括Preply的4200万美元融资、ELSA Speak的2300万美元融资，以及Speak、AllRight和Loora的融资。
5. PTE猩际为代表的考试类产品月访问量达到250万，标准化语言考试赛道具有巨大潜力。
6. AI相关的语言教育产品如Trinka AI和Paraphrasingtool.ai已进入TOP15，AI驱动的语言学习工具逐步进入市场。

数据来源：similarweb 单位：万visit

语言教育 - Top15

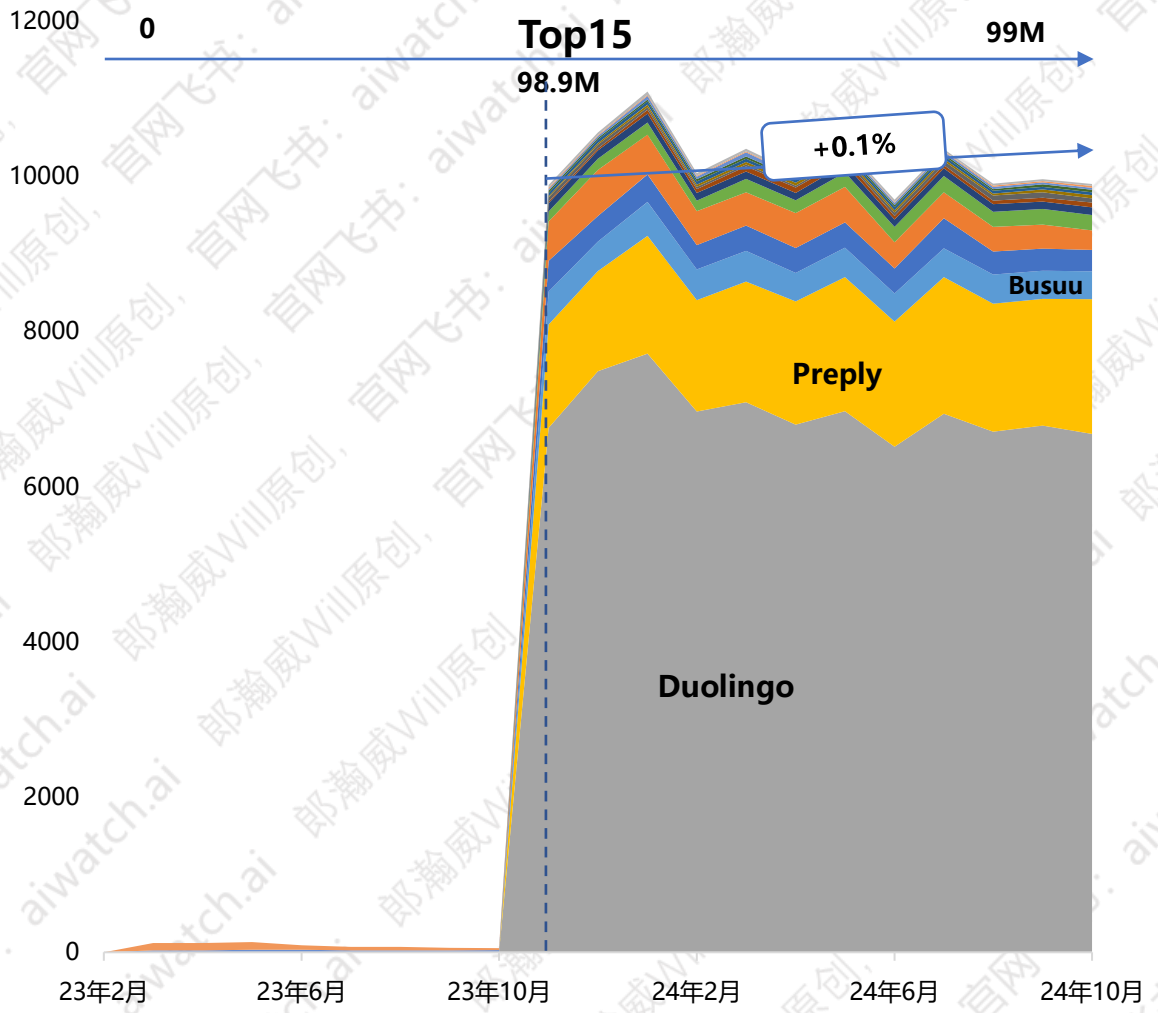
- **TOP15总融资额：1.6亿美元** (Preply (Preply 42M$)+ELSA Speak(ELSA 23M$)+Speak(78M$)+All Right(AllRight 1M$)+Loora(Loora 12M$)=156M$)
- **Top15 总网页流量：9887万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Duolingo		6,681	-	Duollingo	-	-	-	-	United States	28%
2	Preply		1,738	-	Preply	C轮	2023/7/19	42	-	United States	16%
3	Busuu		360	-	Chegg inc	-	-	-	-	United States	14%
4	Memrise		275	-	Memrise	-	-	-	-	United States	17%
5	PTE 猩际		250	-	深圳星宇宙	-	-	-	-	India	57%
6	ELSA Speak		200	-	ELSA	C轮	2023/9/12	23	-	Viet Nam	56%
7	Mondly		99	-	ATi Studios	-	-	-	-	United States	16%
8	Abceed		61	-	Globee	-	-	-	-	Japan	93%
9	EWA English		54	-	Lithium Lab	-	-	-	-	Spain	9%
10	Speak		41	-	Speak	C轮	2024/12/10	78	50	Korea	56%
11	Babbel		36	-	Babbel GmbH	-	-	-	-	United States	29%
12	All Right		32	-	AllRight	Convertible Note	2023/4/18	1	-	Ukraine	26%
13	Trinka AI	29	28	-3%	Trinka AI	-	-	-	-	United States	12%
14	Paraphrasingtool.ai	23	25	9%	Paraphrasingtool.ai	-	-	-	-	United States	20%
15	Loora		7	-	Loora	A轮	2024/2/21	12	-	United States	12%

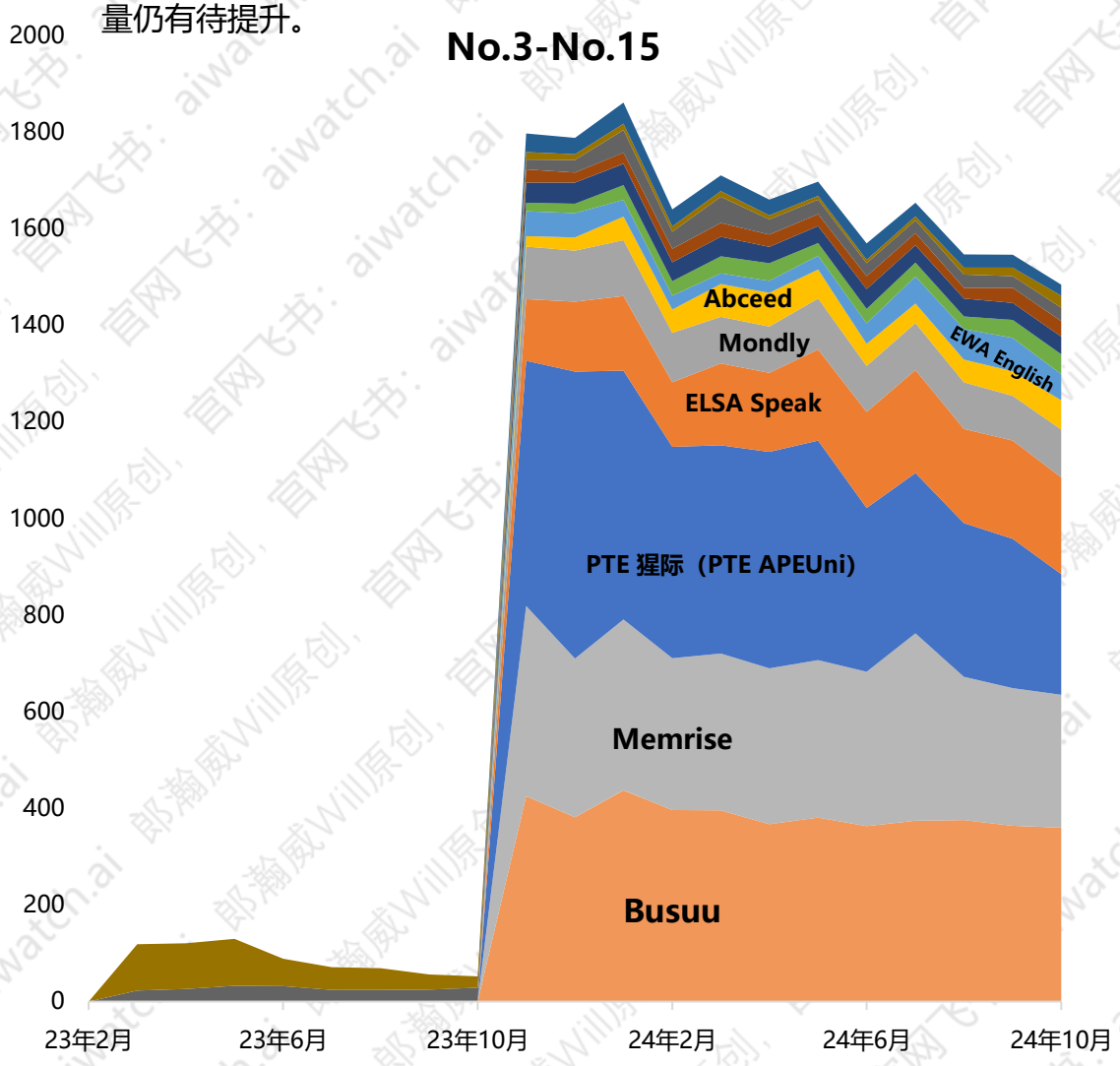
数据来源：similarweb 单位：万visit

语言教育 网页流量趋势 10月总量：9903万

- 从趋势图看，Duolingo遥遥领先，稳居行业第一，市场份额稳定在65%以上。Preply作为第二大平台，访问量保持稳定增长，市场份额在15%左右波动。



- Busuu、Memrise和PTE猎际构成稳定的第二梯队，三者访问量均在250-360万次之间。ELSA Speak、Mondly等新兴平台增长迅速，但体量仍有待提升。

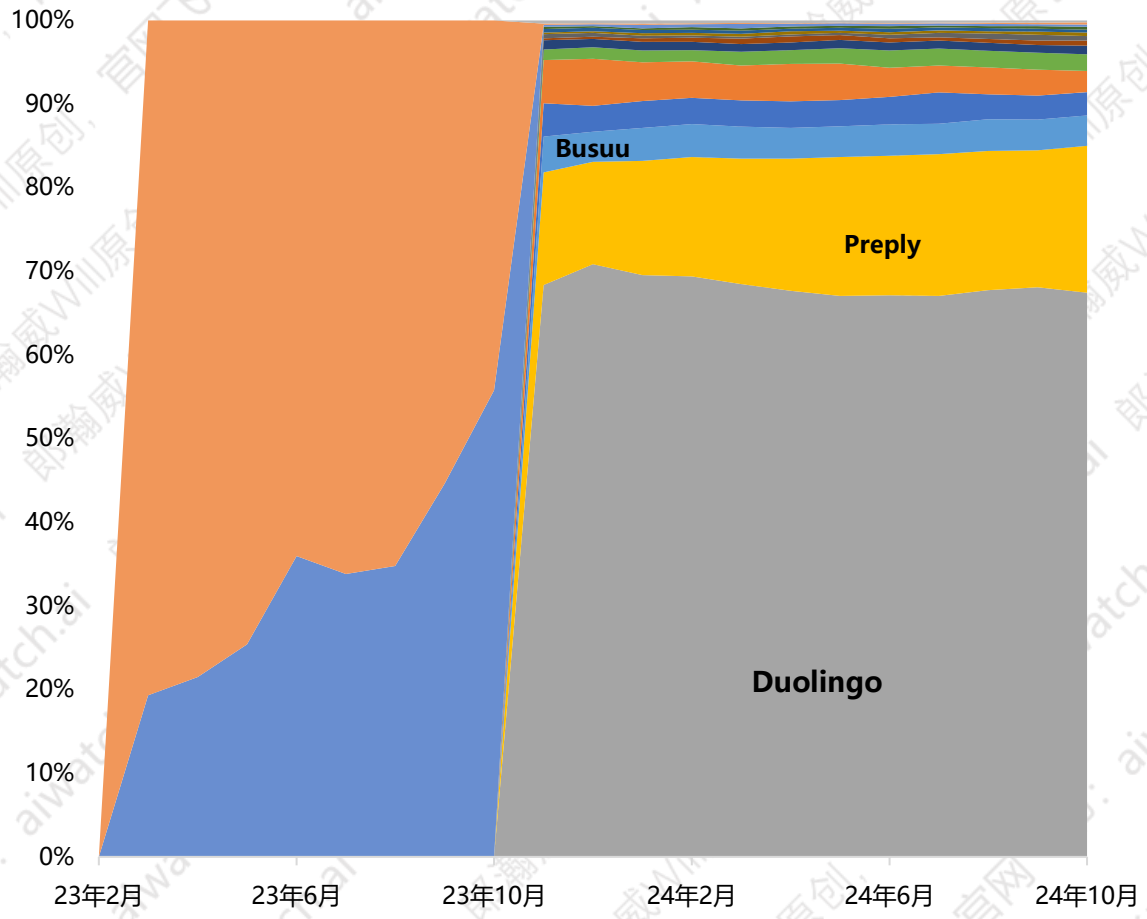


数据来源：similarweb 单位：万visit

语言教育 2023.2~2024.10 网页流量占比

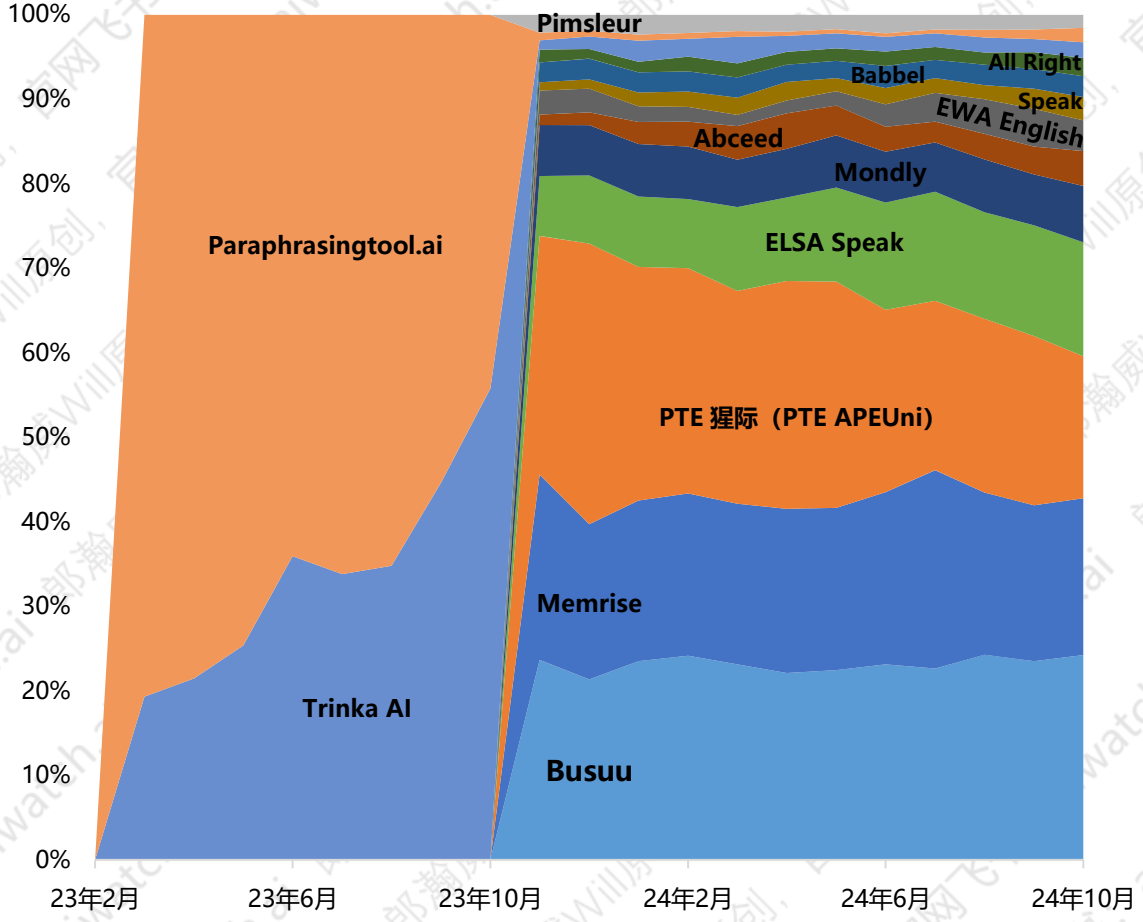
- 从整体占比看，Duolingo的市场份额持续保持在65%以上，处于绝对领先地位。Preply占据约15%的市场份额，两者共同占据了超过80%的市场。

Top15占比



- 在No.3-No.15梯队中，Busuu、Memrise和PTE猎际三家企业份额相对稳定，各占3-5%不等。ELSA Speak等后起之秀虽增长迅速，但份额仍相对较小。

No.3-No.15占比



数据来源：similarweb 单位：万visit

语言教育 国际 | 国产 | 出海 Top10

国际

- Duolingo月访问量6681万次，优势明显。

序号	产品名称	24年10月 (万visit)
1	Duolingo	6,681
2	Preply	1,738
3	Busuu	360
4	Memrise	275
5	ELSA Speak	200
6	Mondly	99
7	Abceed	61
8	EWA English	54
9	Speak	41
10	Babbel	36

国产

- PTE猎际访问量250万次，一枝独秀

序号	产品名称	24年10月 (万visit)
1	PTE 猩际（PTE APEUni）	250
2	AI外教	3
3	AI英会话	1
4	多说	0.2
5	智能口语大师	-
6	火花口语	-
7	碰词儿APP	-

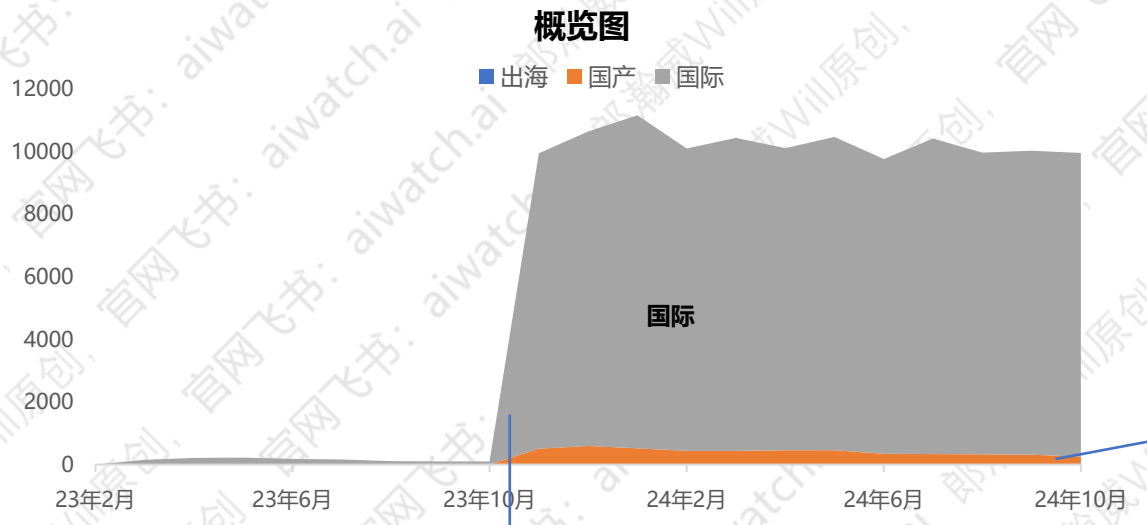
出海

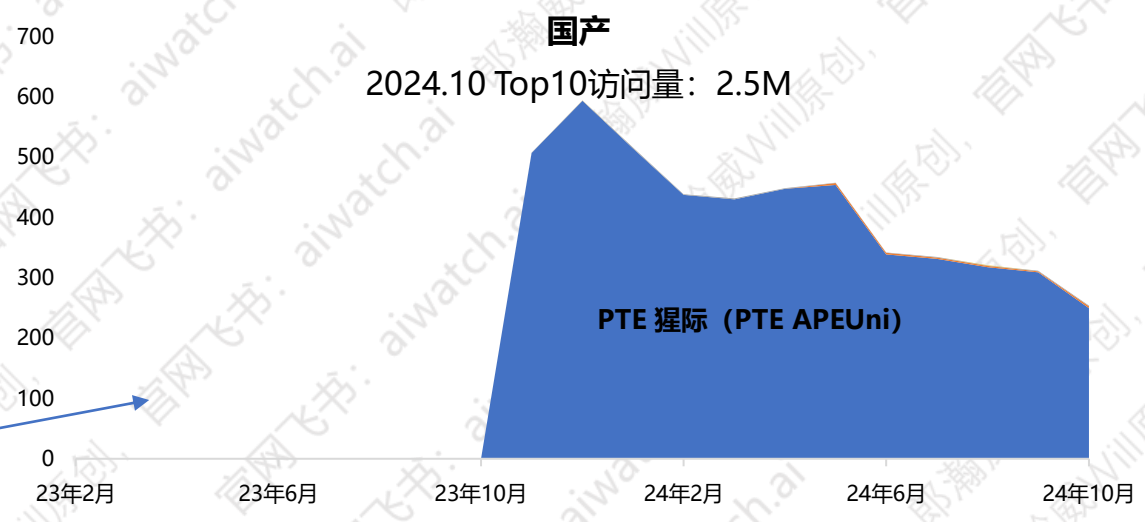
- Sivi访问量仅1万次，发展空间较大。

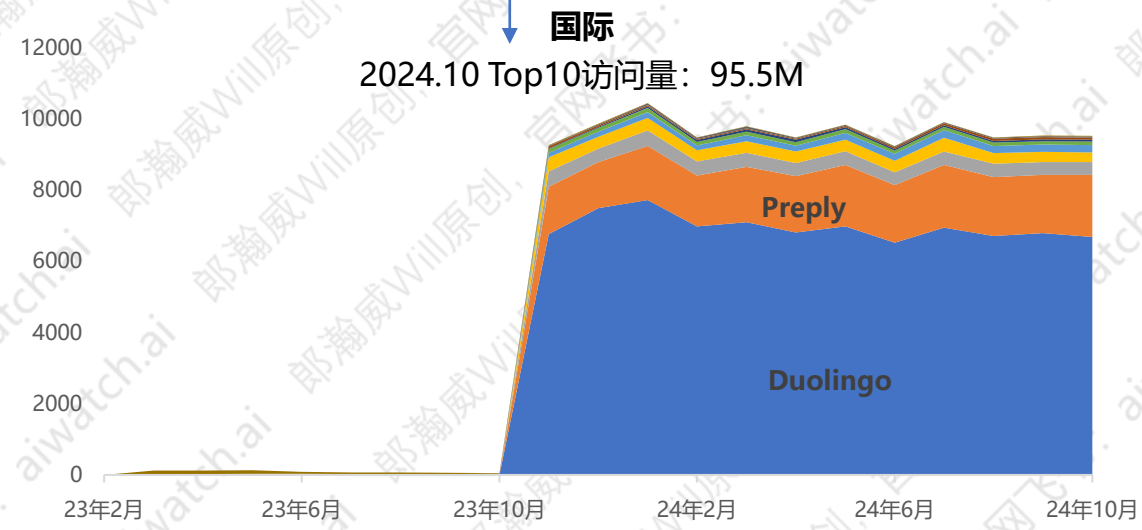
序号	产品名称	24年10月 (万visit)
1	Sivi	1

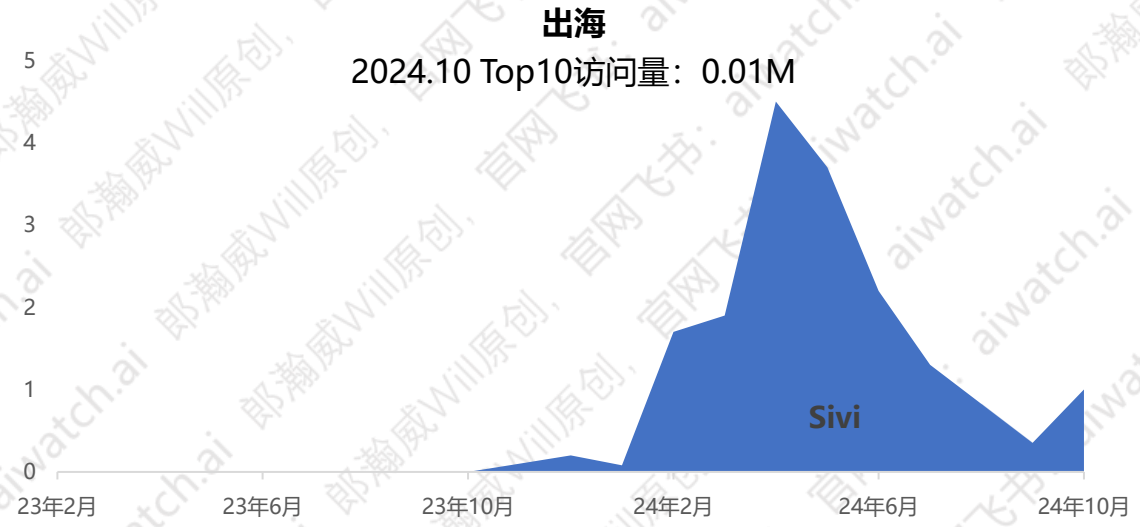
数据来源：similarweb 单位：万visit

语言教育 国际 96% | 国产 3.98% | 出海 0.02%





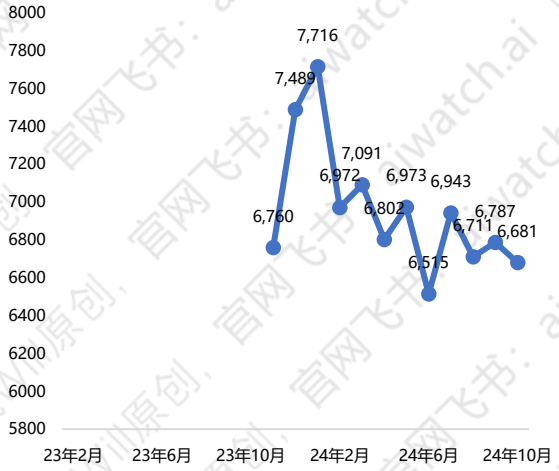




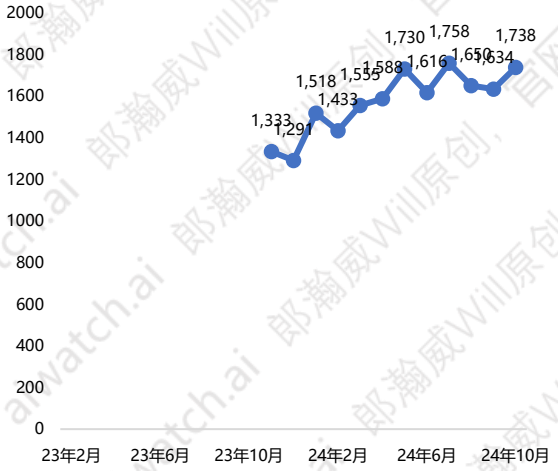
数据来源：similarweb 单位：万visit

语言教育 No.1-No.8

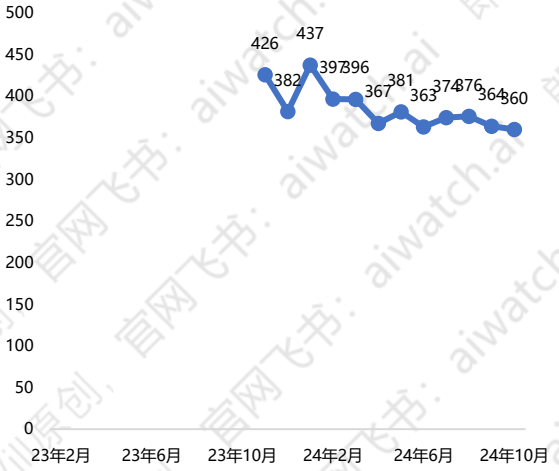
1 Duolingo



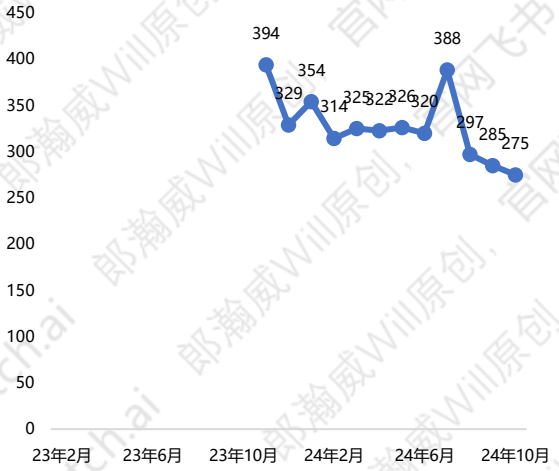
2 Preply



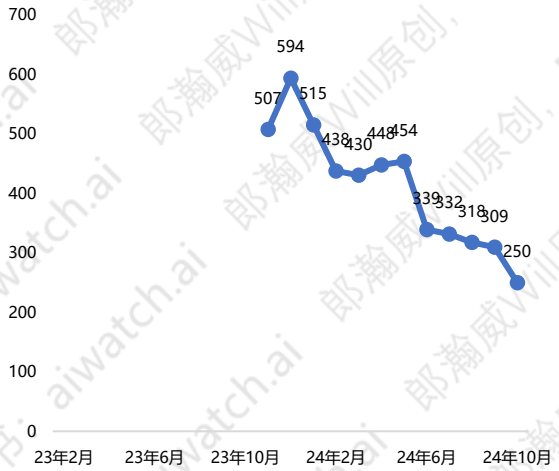
3 Busuu



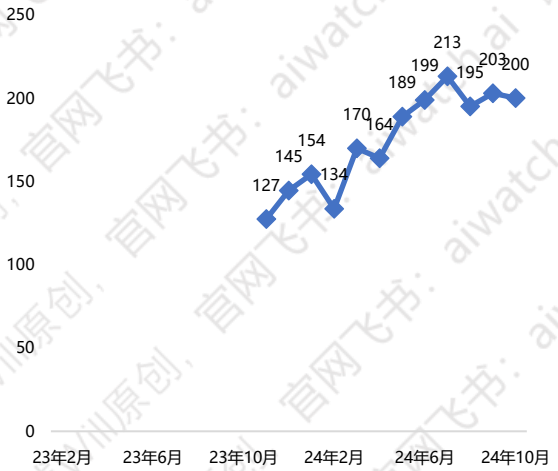
4 Memrise



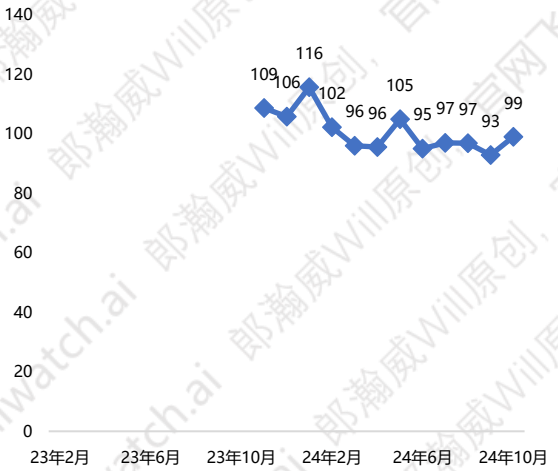
5 PTE 猩际（PTE APEUni）



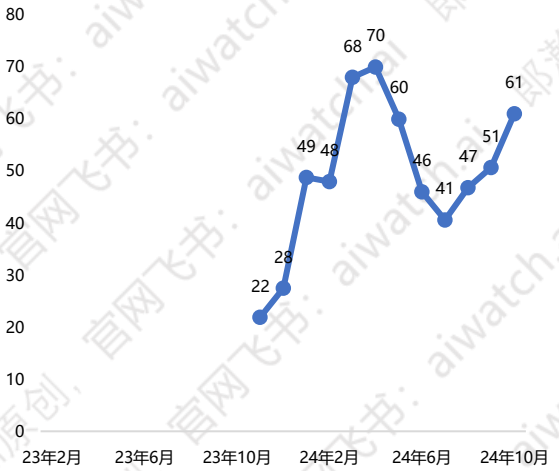
6 ELSA Speak



7 Mondly



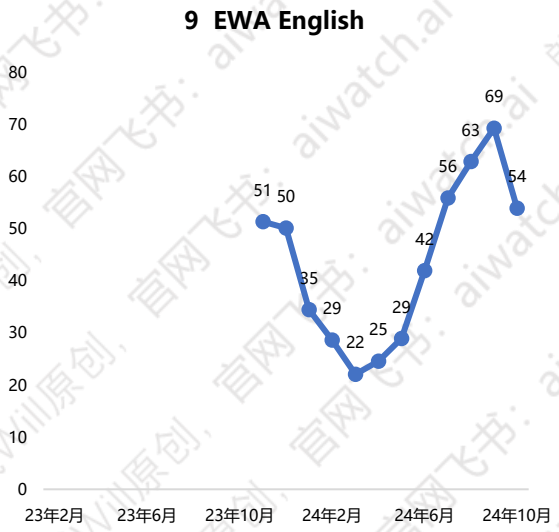
8 Abceed

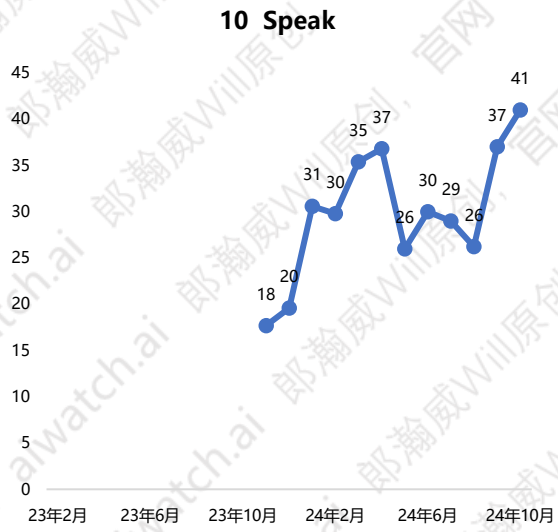


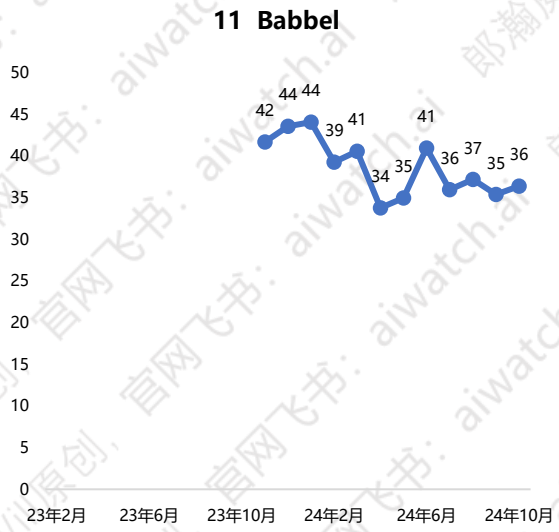
数据来源：similarweb 单位：万visit

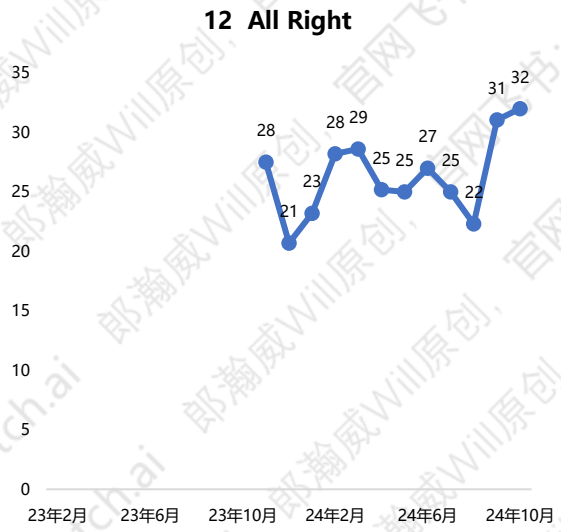
郎瀚威Will原创，官网飞书：aiwatch.ai

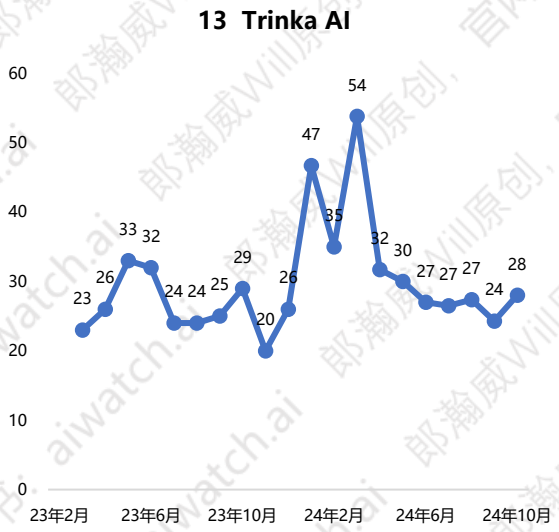
语言教育 No.9-No.16

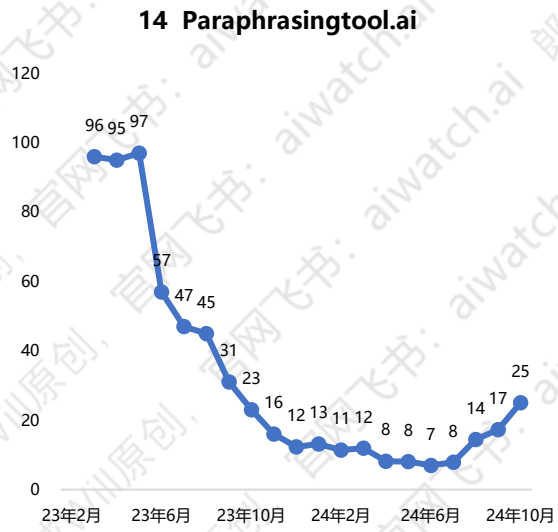


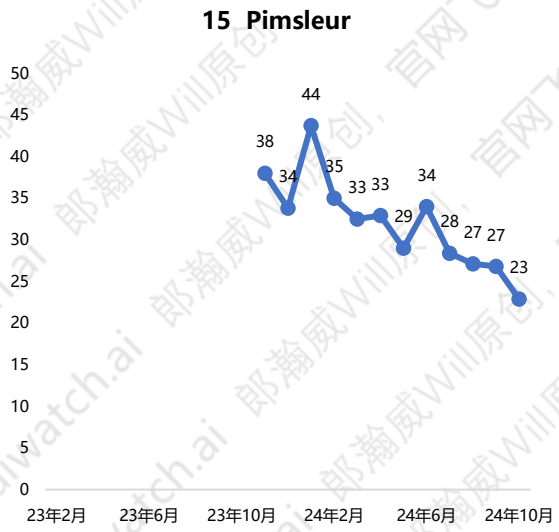


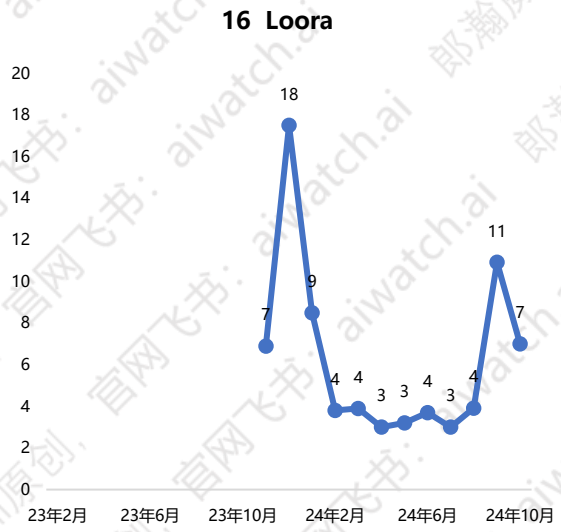






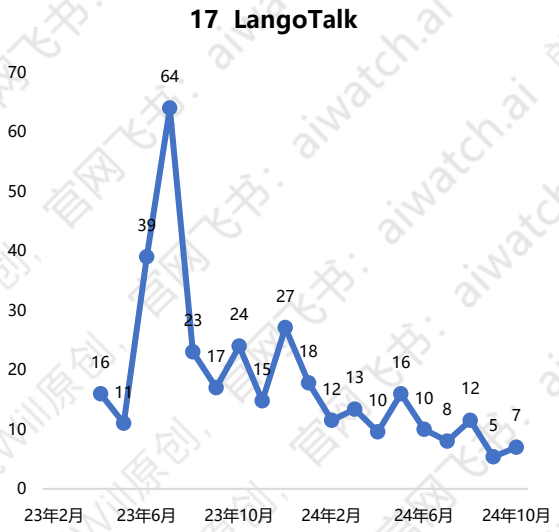


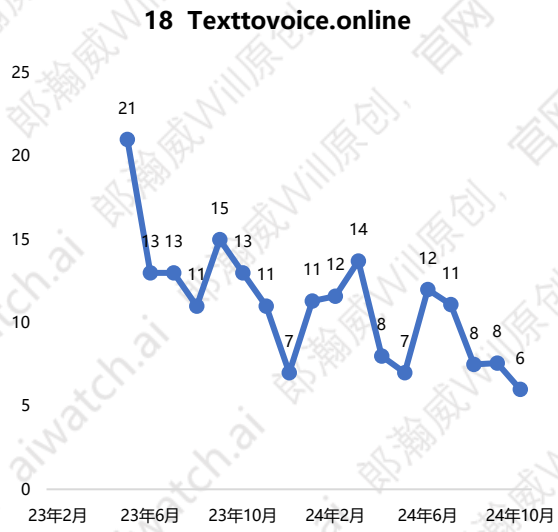


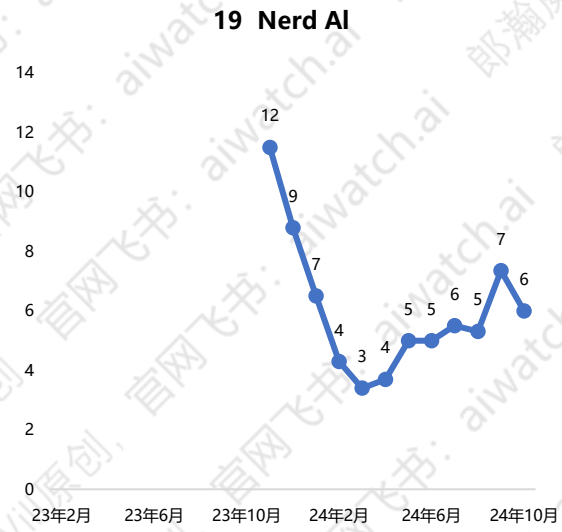


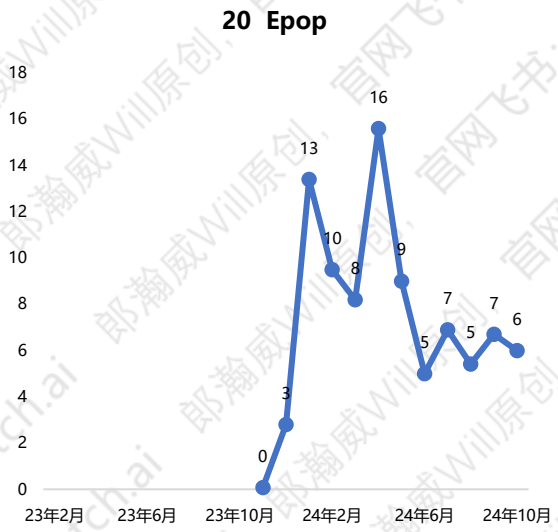
数据来源：similarweb 单位：万visit

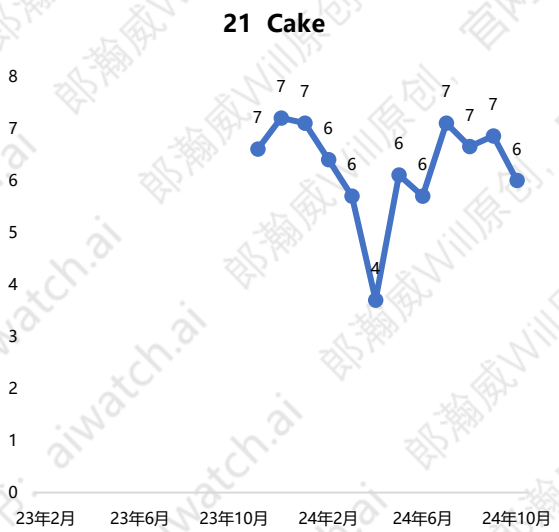
语言教育 No.17-No.24

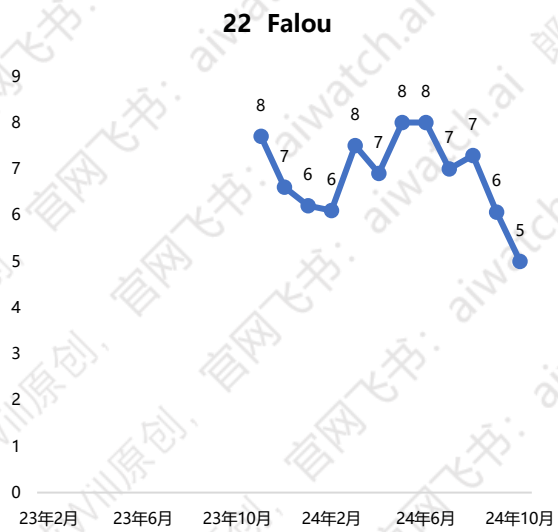


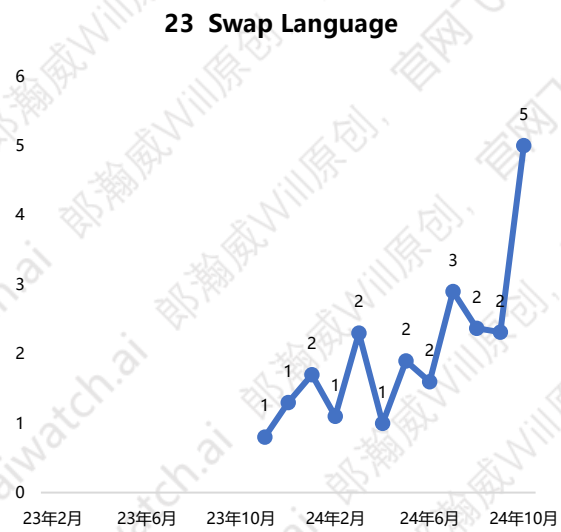


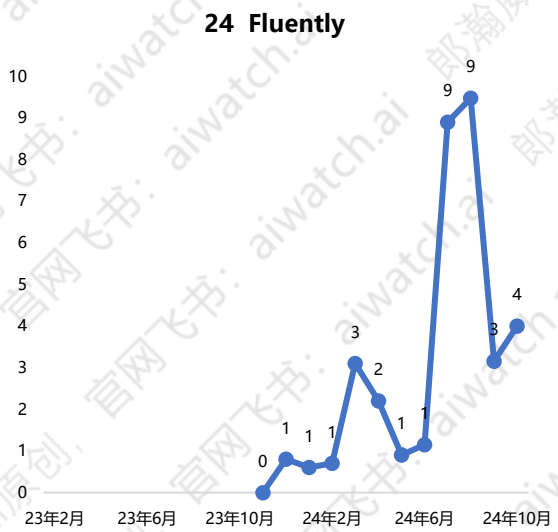








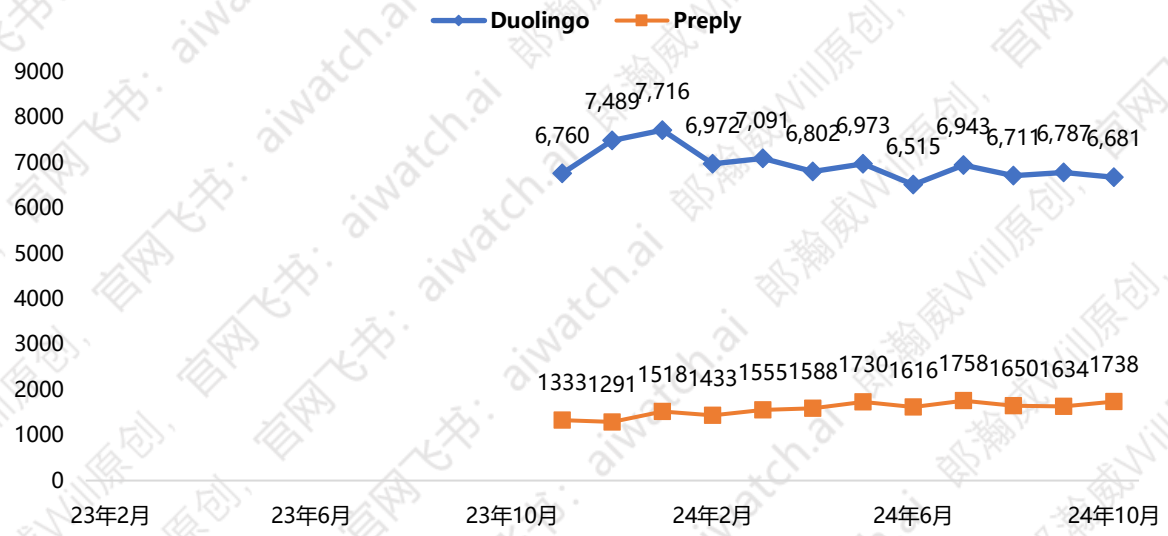


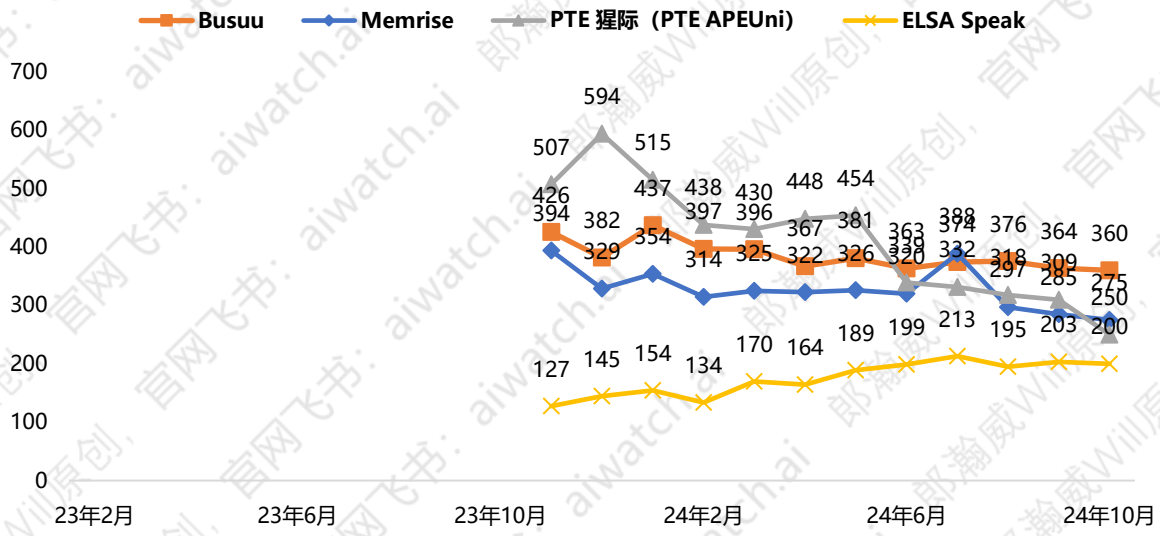


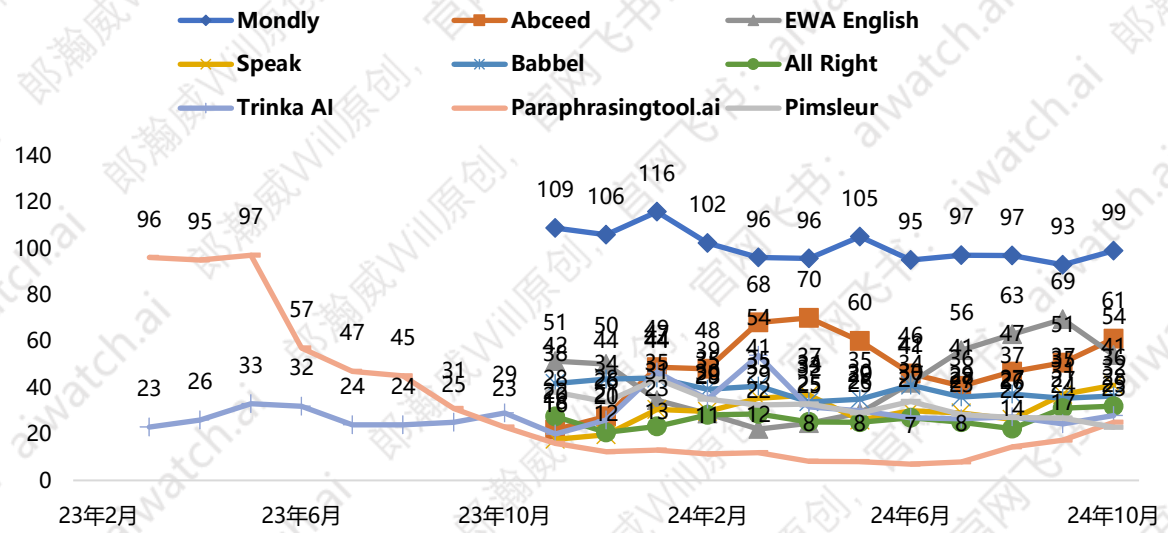
数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

语言教育 复合图表







数据来源：similarweb 单位：万visit

拍照搜题

拍照搜题

拍照搜题 – Takeaway

1. 2024年10月拍照搜题赛道TOP15产品总访问量达5030万次。
2. 行业第一梯队由Mathway、Gauth和Socratic by Google组成，月访问量分别达2273万、1785万和310万次。
3. 赛道整体呈现增长态势，但Socratic by Google的访问量同比下降54%。
4. 近期融资仅有QANDA（MathPresso）在2023年9月完成700万美元的企业轮融资。
5. AI产品在该赛道表现活跃，其中Question AI以257万月访问量位列第四。
6. 拍照搜题赛道呈现明显的头部效应，前两名Mathway和Gauth的访问量占据了总流量的80%以上。

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

拍照搜题 - Top15

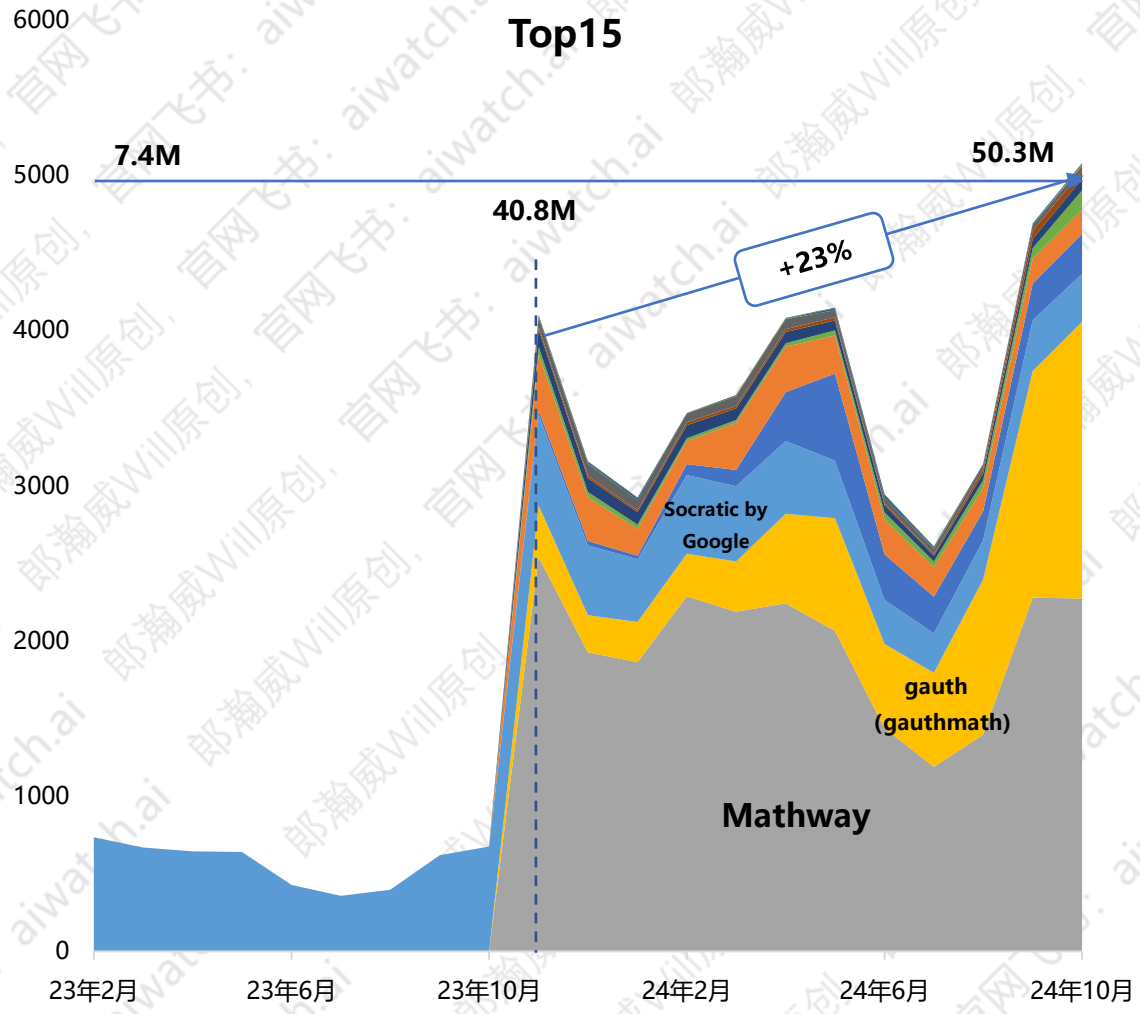
- **TOP15总融资额：760万美元** (QANDA (MathPresso 7.6M$))
- **Top15 总网页流量：5030万次visit**

序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Mathway		2,273	-	Chegg	-	-	-	-	United States	64%
2	Gauth		1,785	-	字节	-	-	-	-	United States	34%
3	Socratic by Google	675	310	-54%	Socratic by Google	-	-	-	-	United States	55%
4	Question AI		257	-	作业帮	-	-	-	-	United States	80%
5	作业帮		156	-	作业帮	-	-	-	-	China	94%
6	Mathos		126	-	Mathos	-	-	-	-	United States	35%
7	PhotoMath		72	-	PhotoMath	-	-	-	-	United States	22%
8	QANDA		32	-	MathPresso	Corporate Round	2023/9/10	7.6	-	Viet Nam	34%
9	小猿口算		8	-	猿辅导	-	-	-	-	China	68%
10	大学搜题酱		6	-	作业帮	-	-	-	-	China	100%
11	小猿搜题		5	-	猿辅导	-	-	-	-	China	94%
12	CheckMath		-	-	tudy Evolution Edtech	-	-	-	-	Indonesia	52%

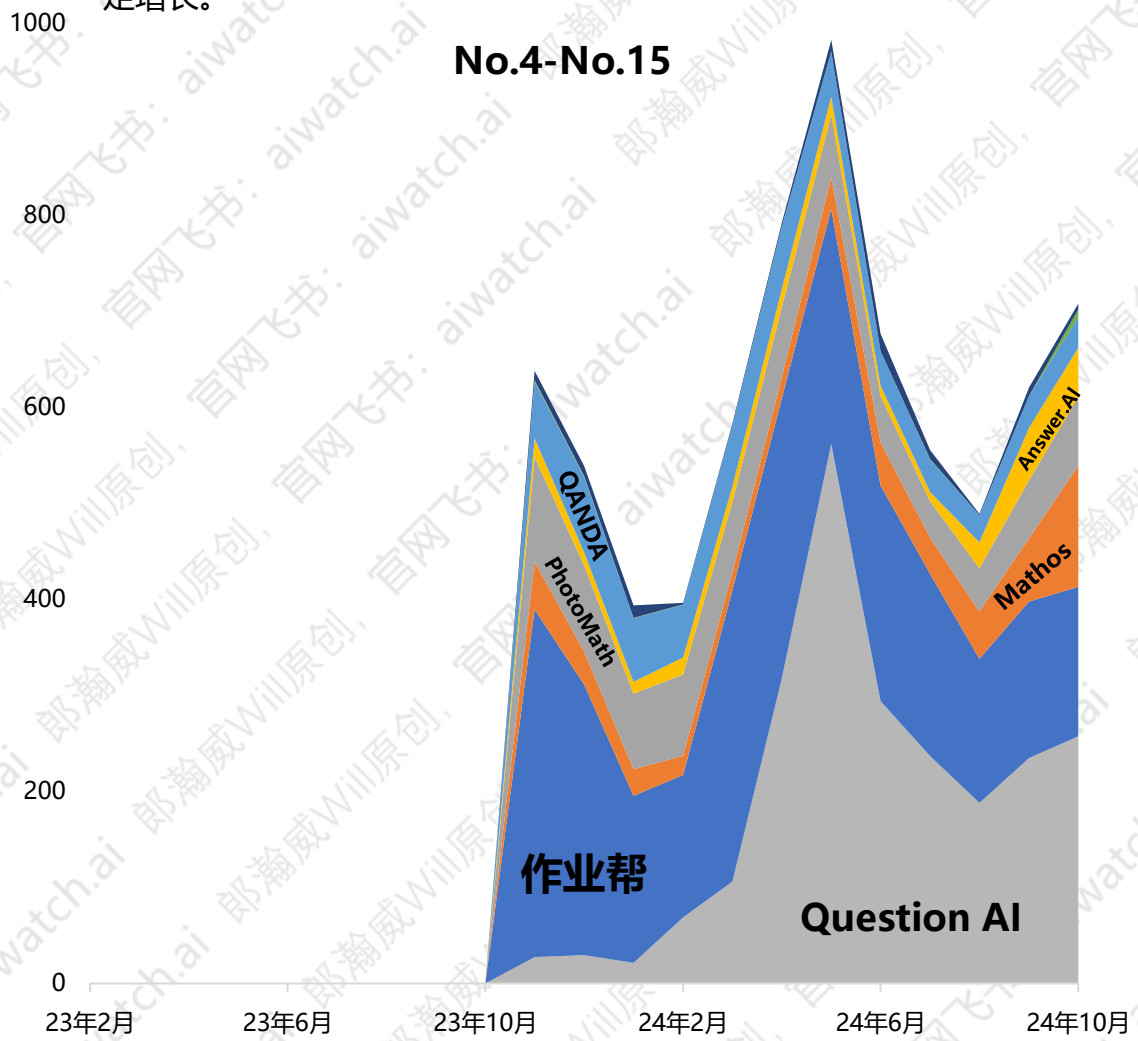
数据来源：similarweb 单位：万visit

拍照搜题 网页流量趋势 10月总量：5030万

- Mathway市场份额持续扩大，稳居行业第一。Gauth增长迅速，成为仅次于Mathway的第二大平台，二者合计占据接近80%的市场份额。



- Question AI和作业帮在第二梯队中表现突出，访问量稳定维持在150-250万次水平。Mathos、PhotoMath等产品份额相对较小，但保持稳定增长。

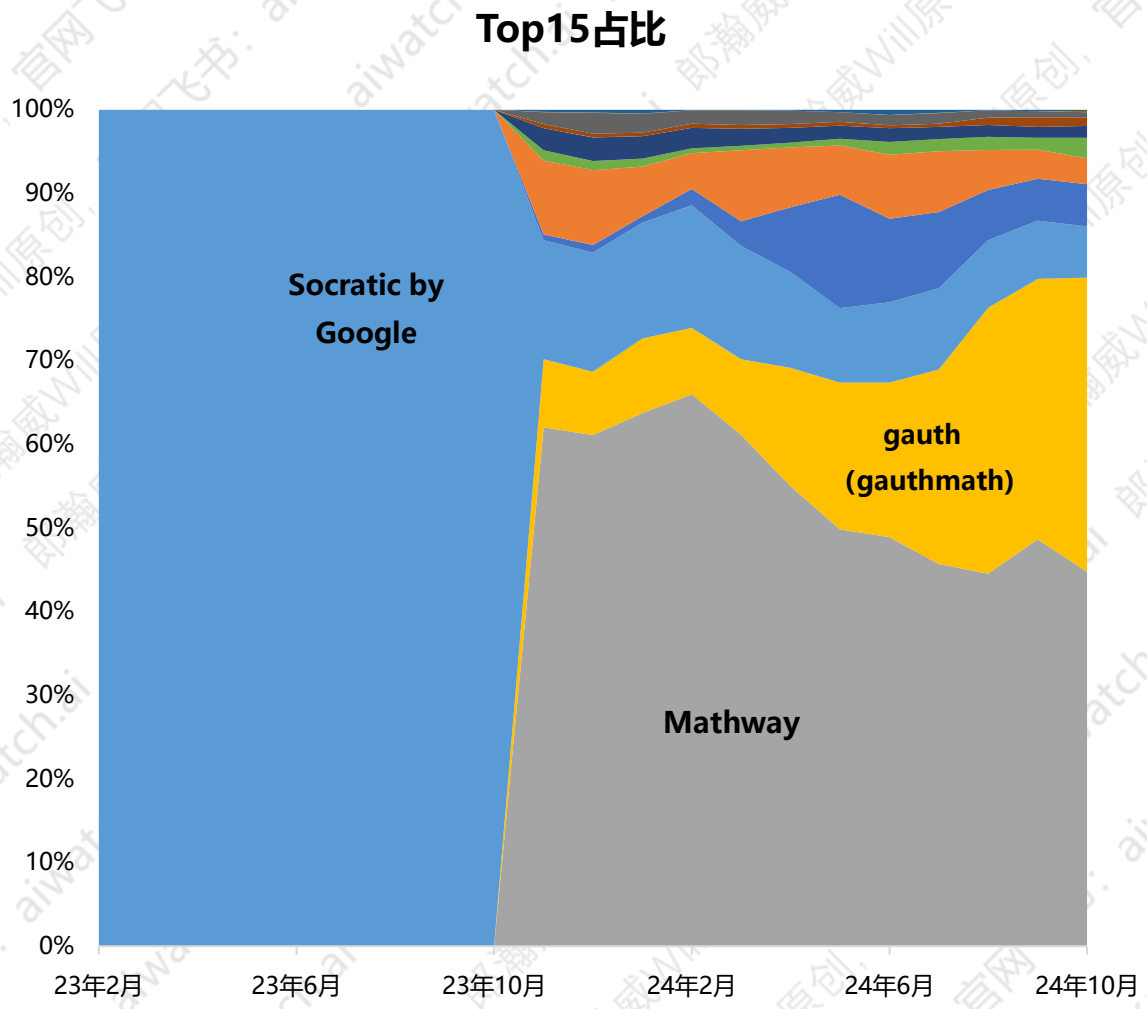


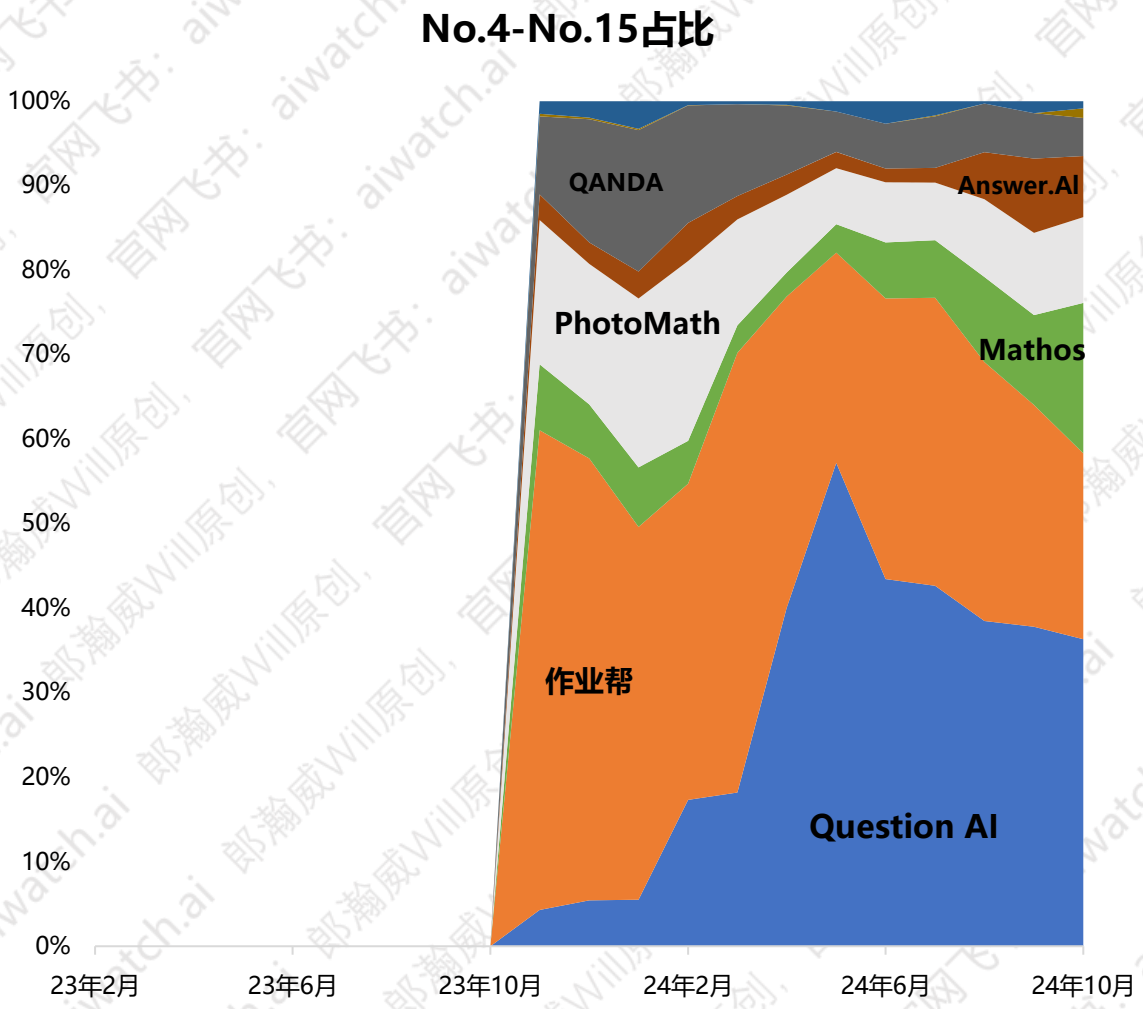
数据来源：similarweb 单位：万visit

拍照搜题 2023.2~2024.10 网页流量占比

- 从整体占比看，Mathway的市场份额稳定在45%左右，Gauth紧随其后占据约35%份额。Socratic by Google份额从主导地位大幅下滑，目前仅占约10%。

- 在No.4-No.15梯队中，Question AI和作业帮表现最为突出，分别占据8-10%的市场份额。其他产品如PhotoMath、QANDA等份额较小，各占2-3%不等。





数据来源：similarweb 单位：万visit

拍照搜题 国际 | 国产 | 出海 Top104

国际

➢ Mathway月访问量2273万次，优势明显。

序号	产品名称	24年10月(万visit)
1	Mathway	2,273
2	Socratic by Google	310
3	Mathos	126
4	PhotoMath	72
5	QANDA	32
6	CheckMath	-

国产

➢ 作业帮访问量156万次，领先地位突出。

序号	产品名称	24年10月(万visit)
1	作业帮	156
2	小猿口算	8
3	大学搜题酱	6
4	小猿搜题	5

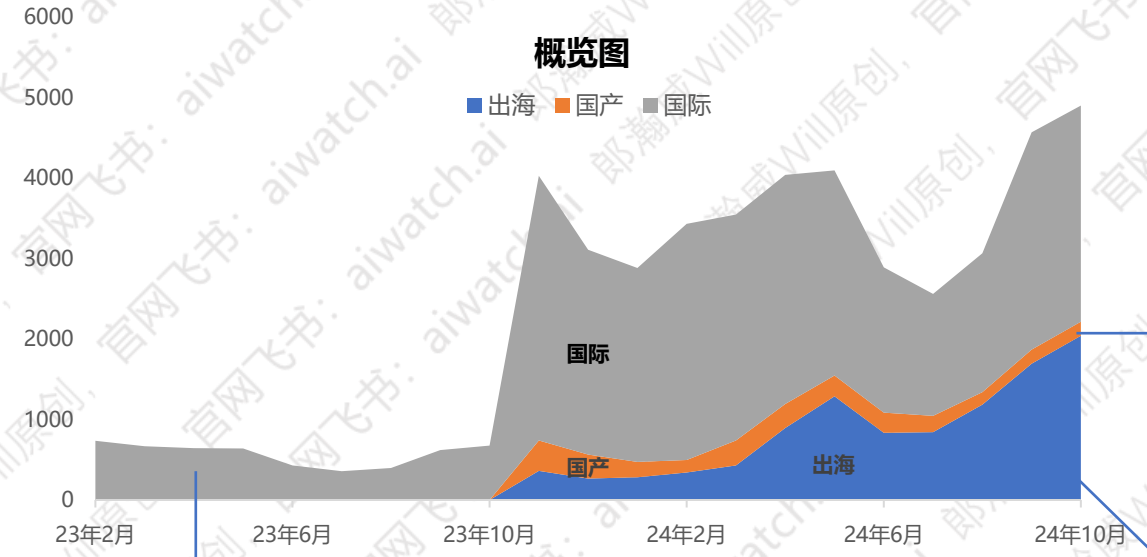
出海

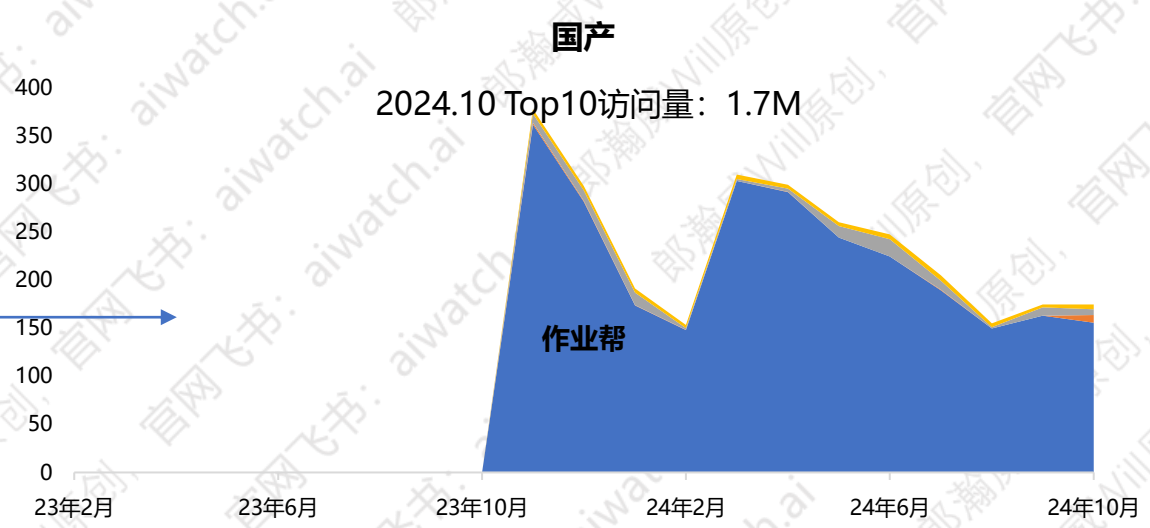
➢ Gauth访问量1785万次，发展态势良好。

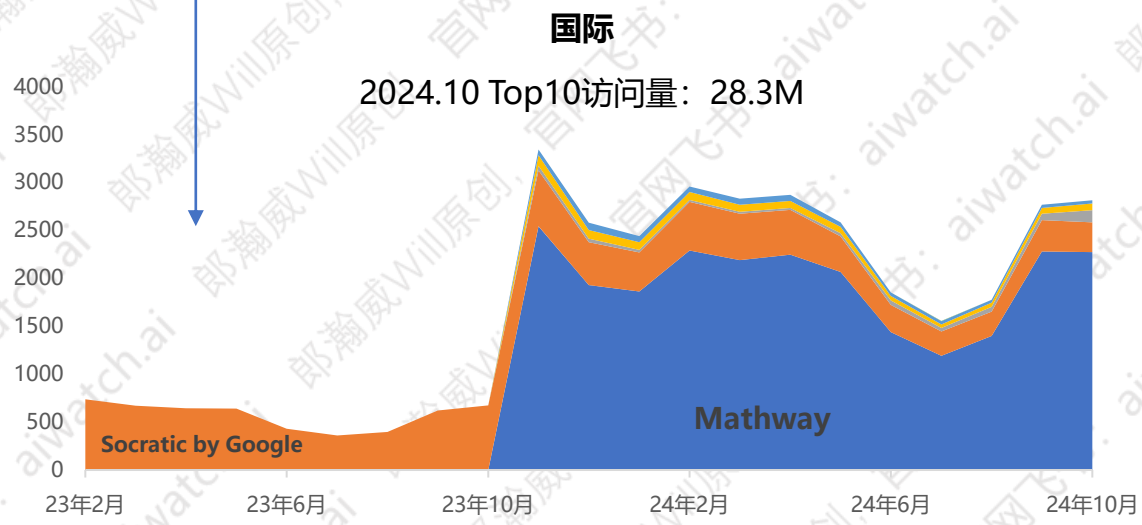
号	产品名称	24年10月(万visit)
1	gauth（gauthmath）	1,785
2	Question AI	257
3	Answer.AI	156

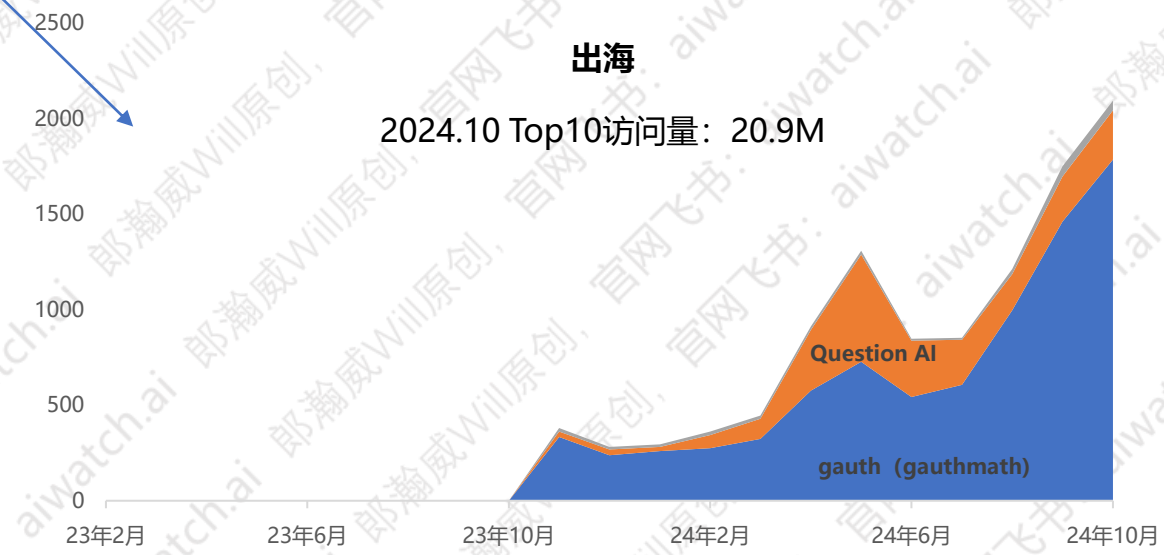
数据来源：similarweb 单位：万visit

拍照搜题 国际 73% | 国产 6% | 出海 21%



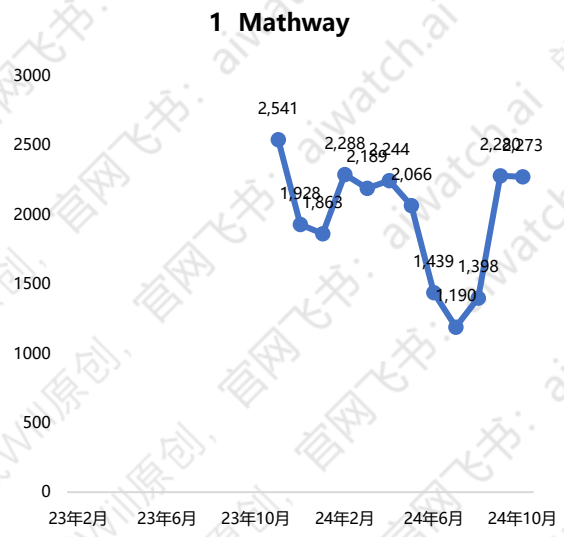


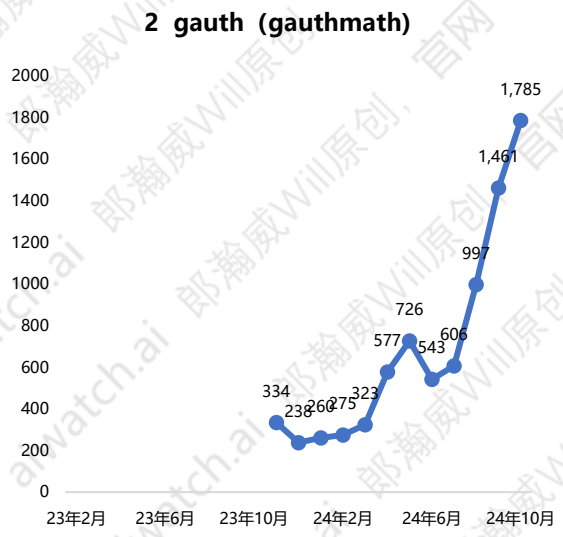


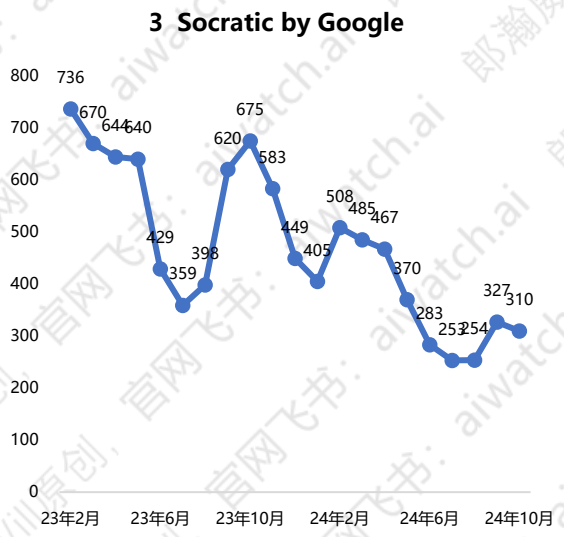


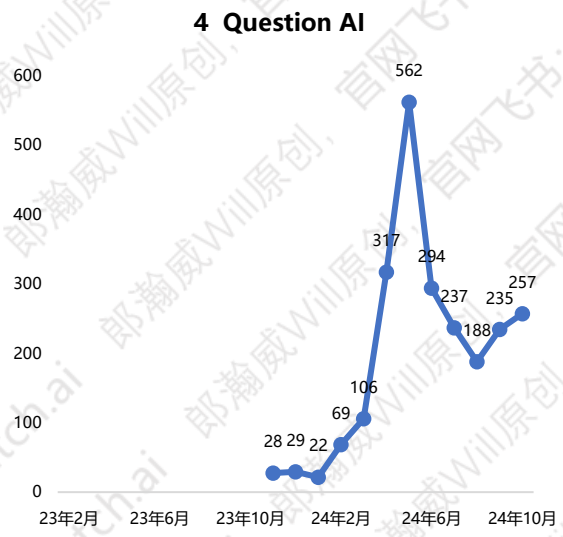
数据来源：similarweb 单位：万visit

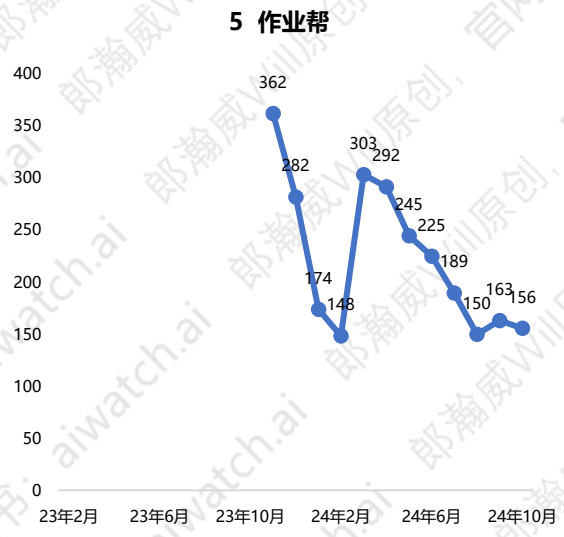
拍照搜题 No.1-No.8

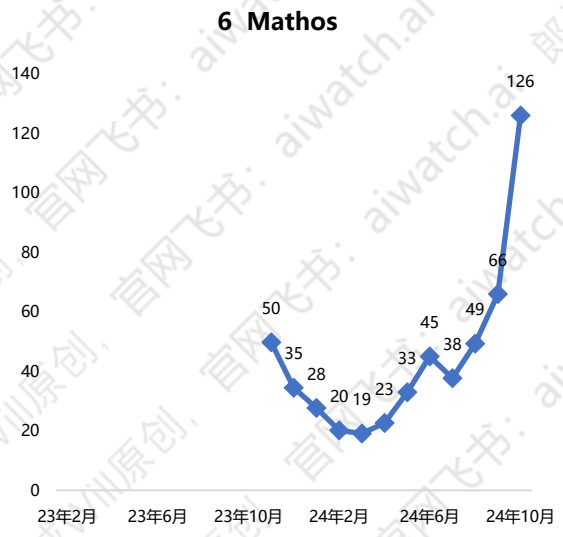


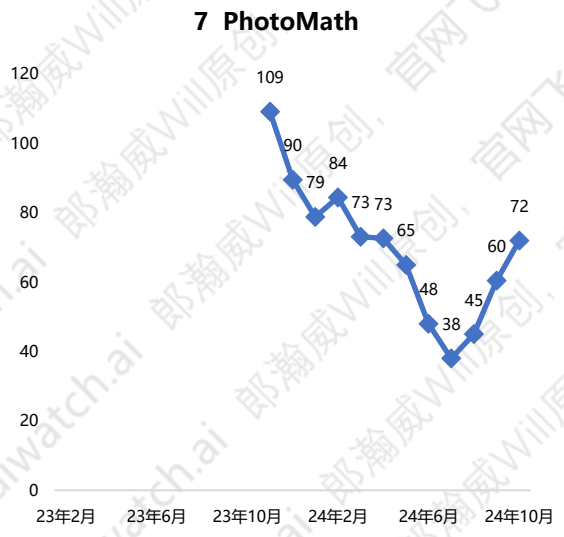


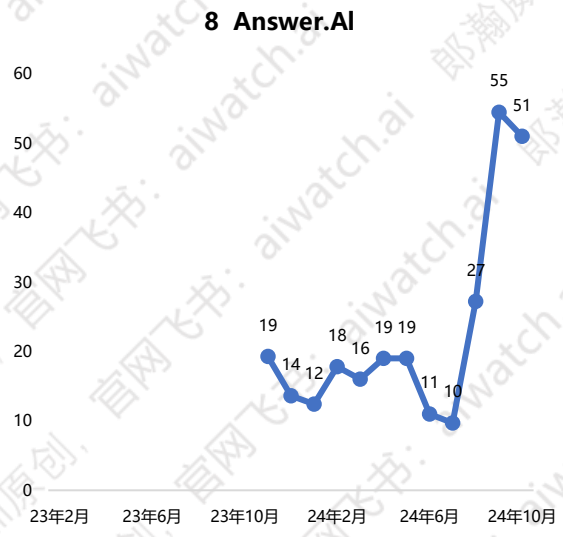








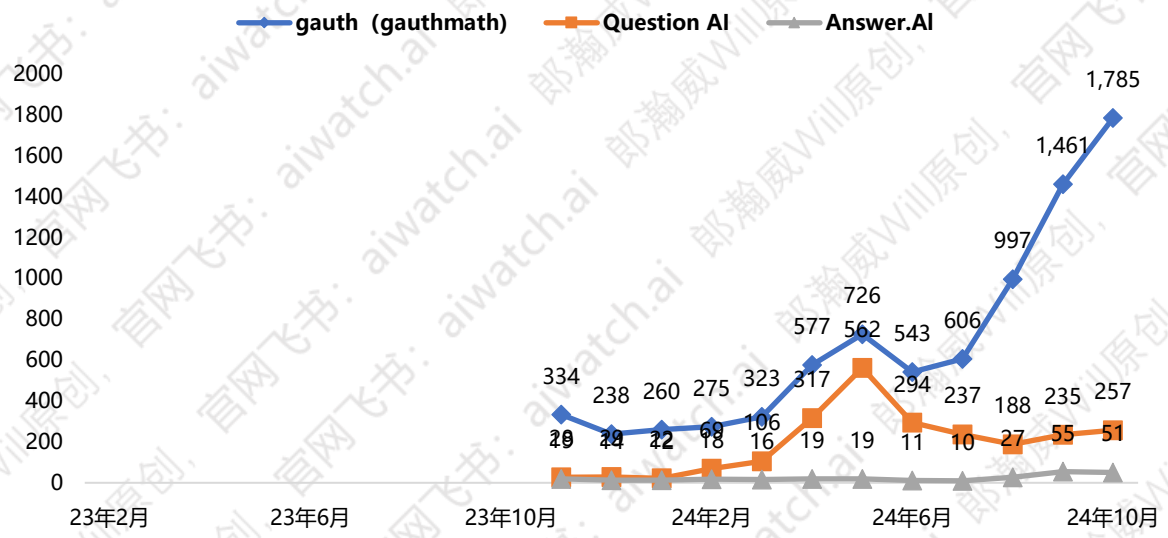


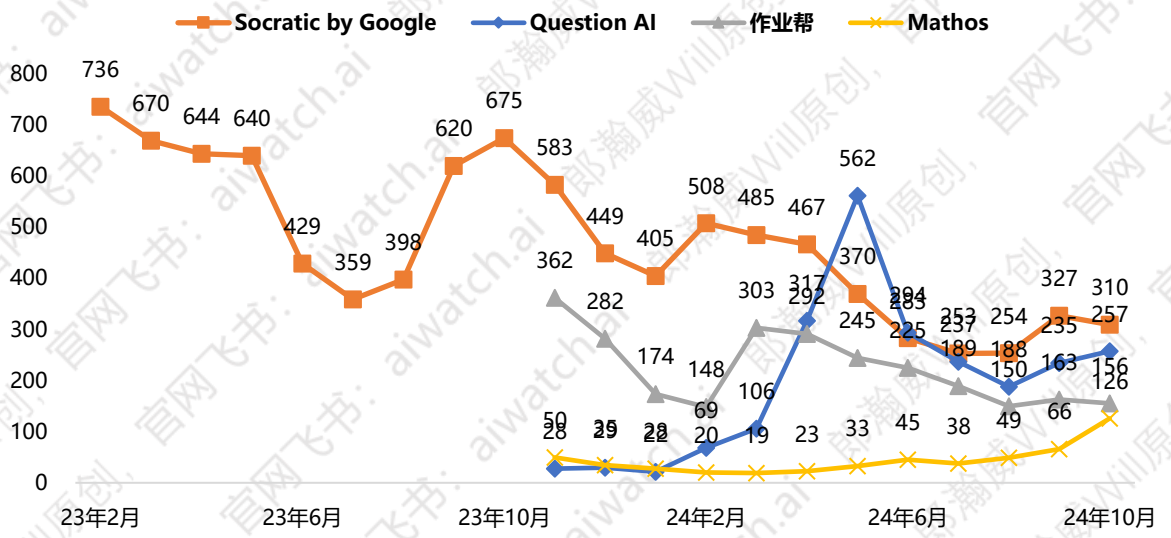


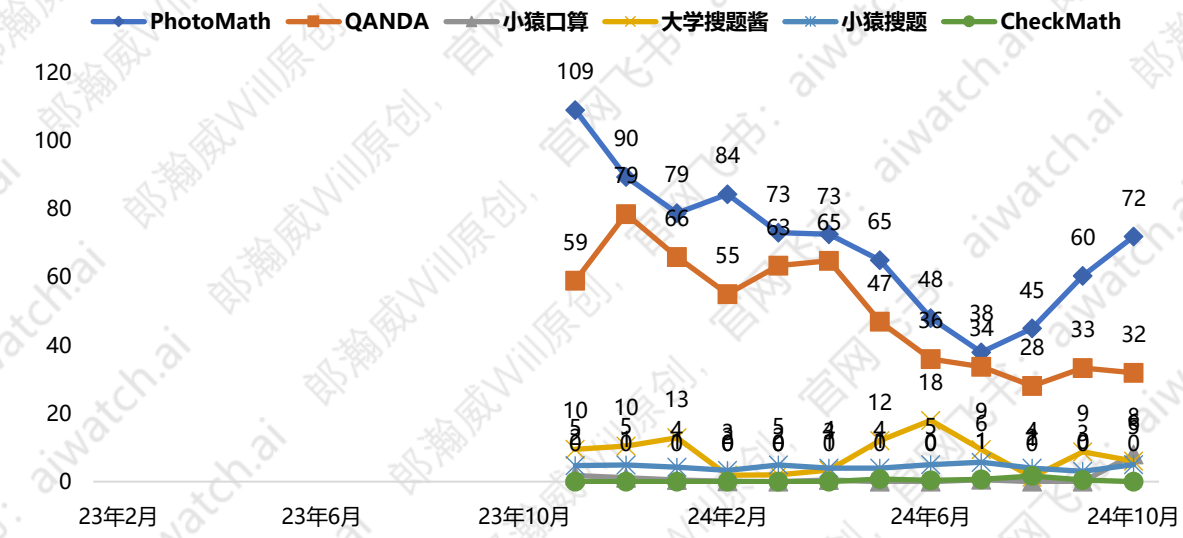
数据来源：similarweb 单位：万visit

aiwatch.ai 郎瀚威Will原创 官网飞书

拍照搜题 复合图表







数据来源：similarweb 单位：万visit

音乐

音乐

音乐 – Takeaway

1. 2024年10月音乐AI赛道TOP15总访问量达到8075万次访问，其中Suno AI一家就占据5195万访问量。
2. Suno AI、Musixmatch和Udio占据前三位置，访问量分别为5195万、1111万和551万次，头部产品差异明显。
3. 增长表现最为惊人的是Suno AI，同比增长高达17876%，而部分老牌产品如Songtell和Musicfy出现较大幅度下滑。
4. 融资方面，Suno AI获得B轮1.25亿美元，Udio获得种子轮1000万美元。
5. 从市场来看，美国公司完全主导了国际市场，而中国市场则相对独立发展，以本土产品为主。
6. AI音乐工具正在从简单的音乐生成向更专业的音乐制作方向发展，如Udio专注于音频工程，Musixmatch专注音乐匹配等。
7. AI音乐赛道正经历从概念验证向实际应用的转变，越来越多产品开始关注音乐版权、商业变现等实际问题。

数据来源：similarweb 单位：万visit

aiwatch.ai 郎瀚威Will原创 官网飞书

音乐 - Top15

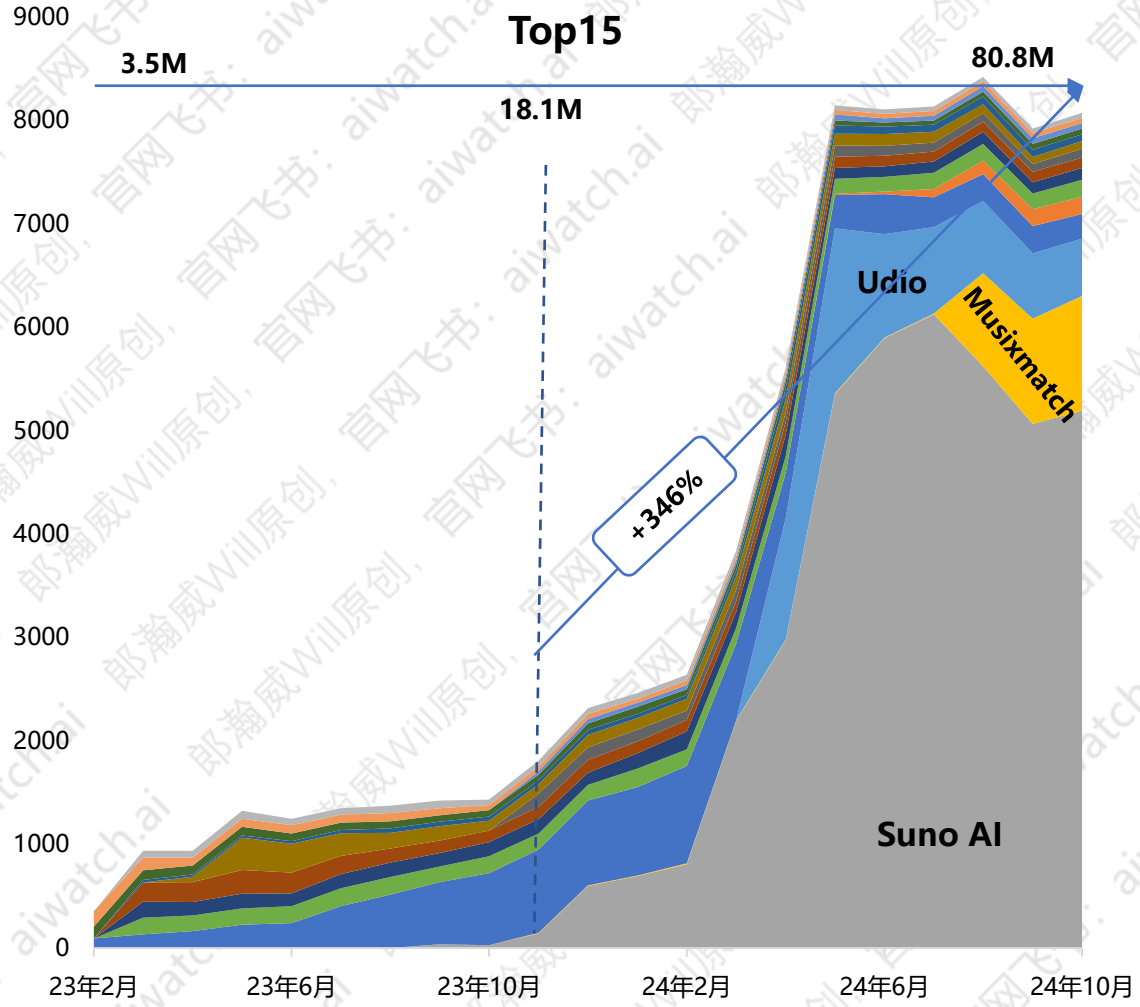
- **TOP15总融资额：1.35亿美元** (Suno AI (Suno 125M$)+Udio (Udio 10M$)+Musicfy (Musicfy 0.2)=135.2M$)
- **Top15 总网页流量：8075万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Suno AI	29	5,195	17876%	Suno	B轮	2024/5/20	125	-	United States	19%
2	Musixmatch		1,111	-	Musixmatch	-	-	-	-	United States	16%
3	Udio		551	-	Udio	种子轮	2024/4/10	10	-	United States	28%
4	Songtell	694	239	-66%	Songtell	-	-	-	-	United States	25%
5	AI Music.so		168	-	AI Music.so	-	-	-	-	United States	28%
6	Landr	165	162	-2%	Landr	-	-	-	-	United States	23%
7	Brain.fm	135	116	-14%	Brain.fm	-	-	-	-	United States	43%
8	Soundraw	111	100	-10%	Soundraw	-	-	-	-	United States	16%
9	iZotope		85	-	iZotope	-	-	-	-	United States	27%
10	Musicfy	97	75	-23%	Musicfy	种子轮前	2023/12/1	0.2	-	United States	21%
11	Loudly	41	66	61%	Loudly	-	-	-	-	United States	13%
12	Aiva	60	54	-10%	Aiva	-	-	-	-	United States	12%
13	Samplette		53	-	Samplette	-	-	-	-	United States	28%
14	Beatoven.ai	50	51	2%	Beatoven.ai	-	-	-	-	United States	17%
15	Spot A Like	52	49	-6%	Spot A Like	-	-	-	-	United States	27%

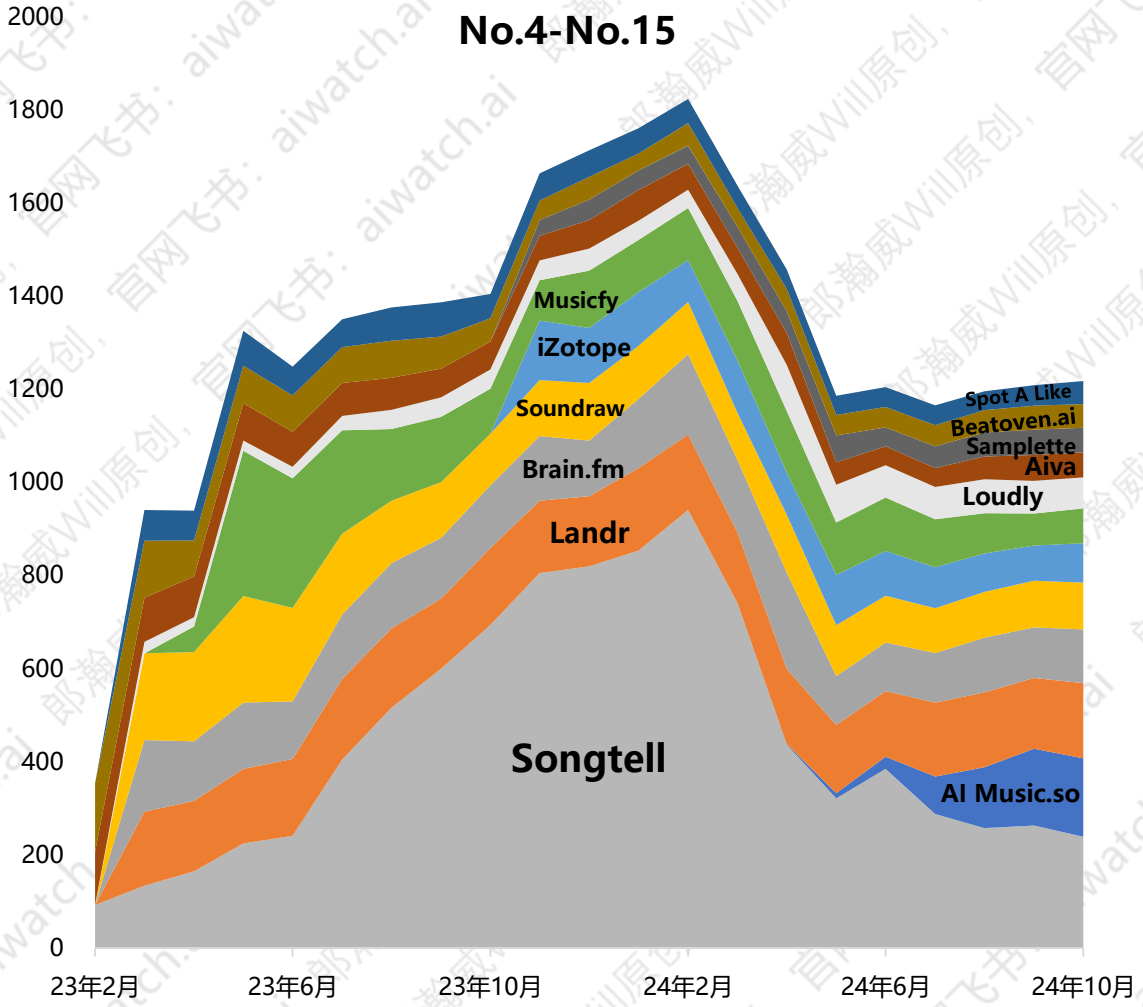
数据来源：similarweb 单位：万visit

音乐 网页流量趋势 10月总量：8075万

- Suno AI自2024年初呈现爆发式增长，访问量和份额都实现跨越式提升。Musixmatch作为新进入者快速崛起，与Udio一起形成第二集团。



- Songtell虽然访问量下滑明显，但仍保持较高基数。AI Music.so和Landr等产品访问量相对稳定，维持在150-170万次区间。

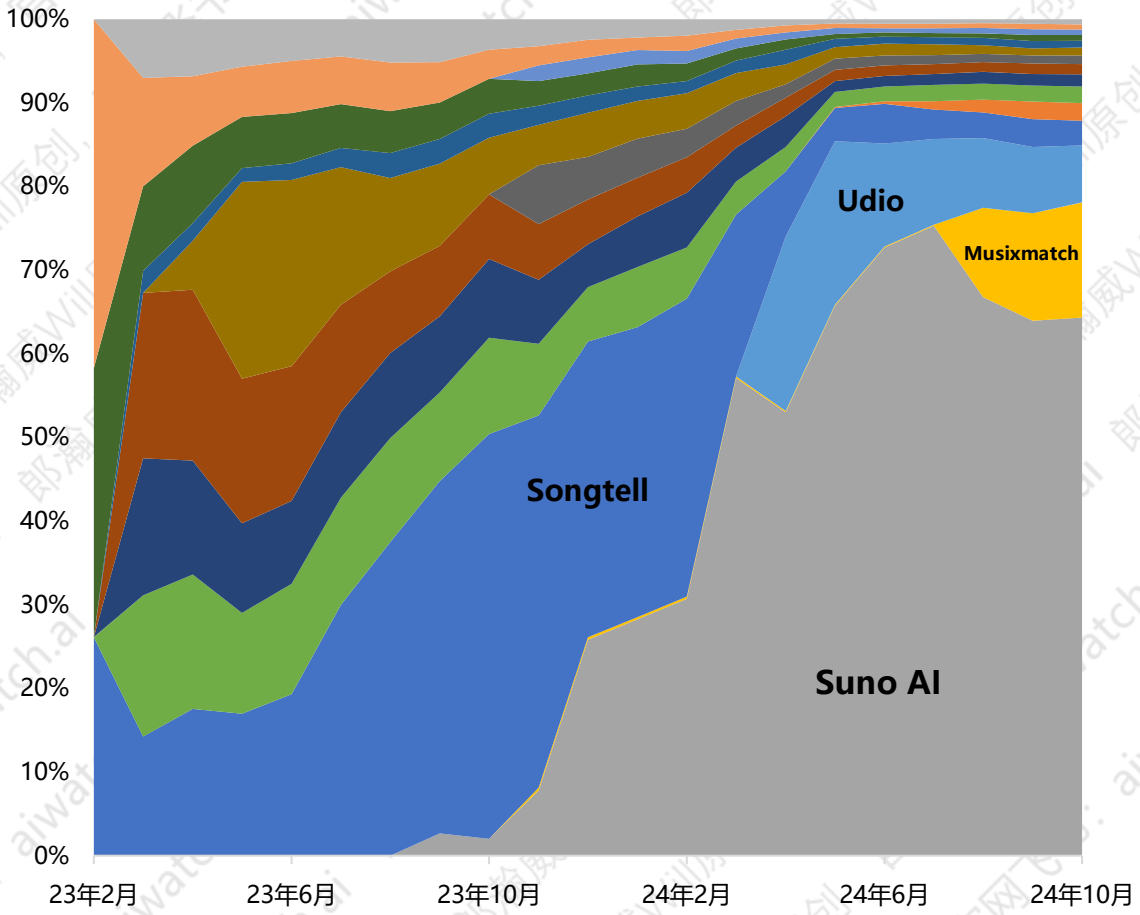


数据来源：similarweb 单位：万visit

音乐 2023.2~2024.10 网页流量占比

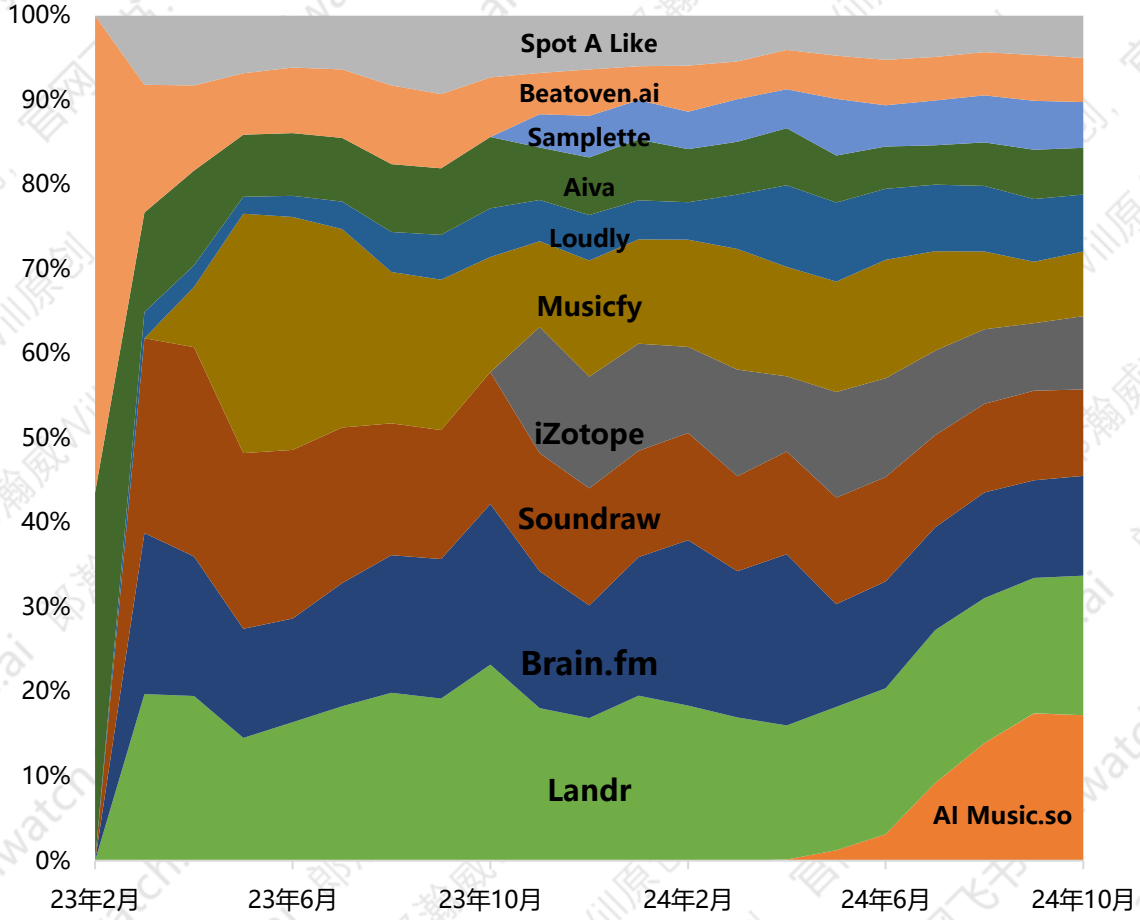
- 从Top15占比图看，Suno AI的市场份额从2023年底开始急剧攀升，目前已占据超过60%的份额。Musixmatch异军突起，占据约15%市场份额，而Udio稳定保持10%左右的份额。

Top15占比



- 在No.5-No.15梯队中，各产品份额差异不大，呈现相对均衡态势。Landr、Brain.fm、Soundraw等产品份额相对稳定，各占3-5%不等，共同构成市场基本盘。

No.5-No.15占比



数据来源：similarweb 单位：万visit

音乐 国际 | 国产 | 出海 Top10

国际

- Suno AI一家独大，访问量5195万次，领先优势明显。

序号	产品名称	24年10月 (万visit)
1	Suno AI	5,195
2	Musixmatch	1,111
3	Udio	551
4	Songtell	239
5	AI Music.so	168
6	Landr	162
7	Brain.fm	116
8	Soundraw	100
9	iZotope	85
10	Musicfy	75

国产

- 淘声网和猴子音悦并列第一，访问量均为12万次。

序号	产品名称	24年10月 (万visit)
1	淘声网	12
2	猴子音悦	12
3	耳聆网	10
4	国际乐谱库	8
5	歌词生成	6
6	100Audio版权音乐	3
7	DJ音乐盒	3
8	网易云音乐·X Studio	2
9	音笑网	2
10	中国原创音乐基地 5SING	1

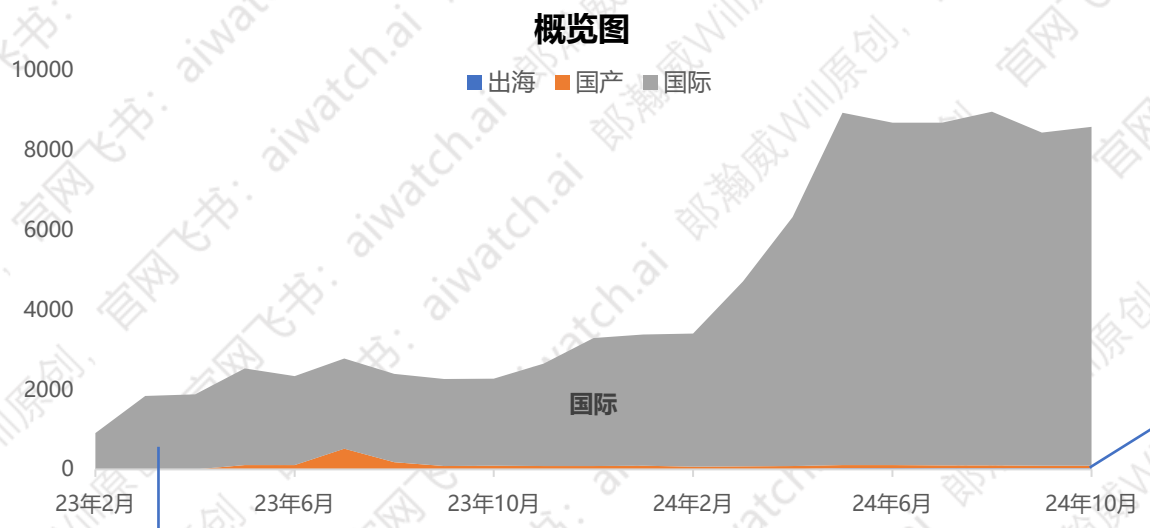
出海

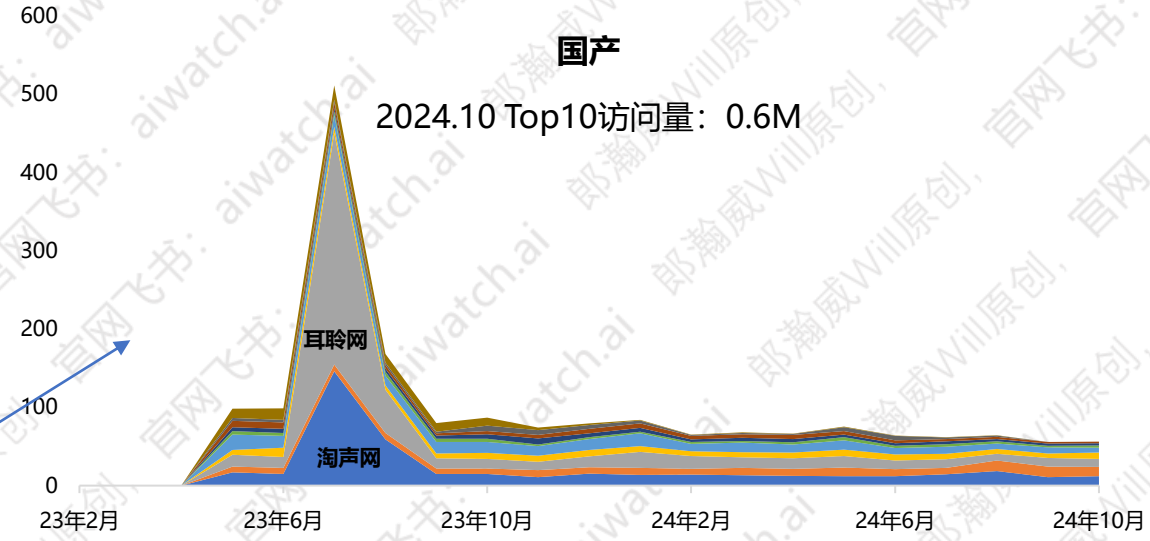
- Noisee独占鳌头，访问量29万次。

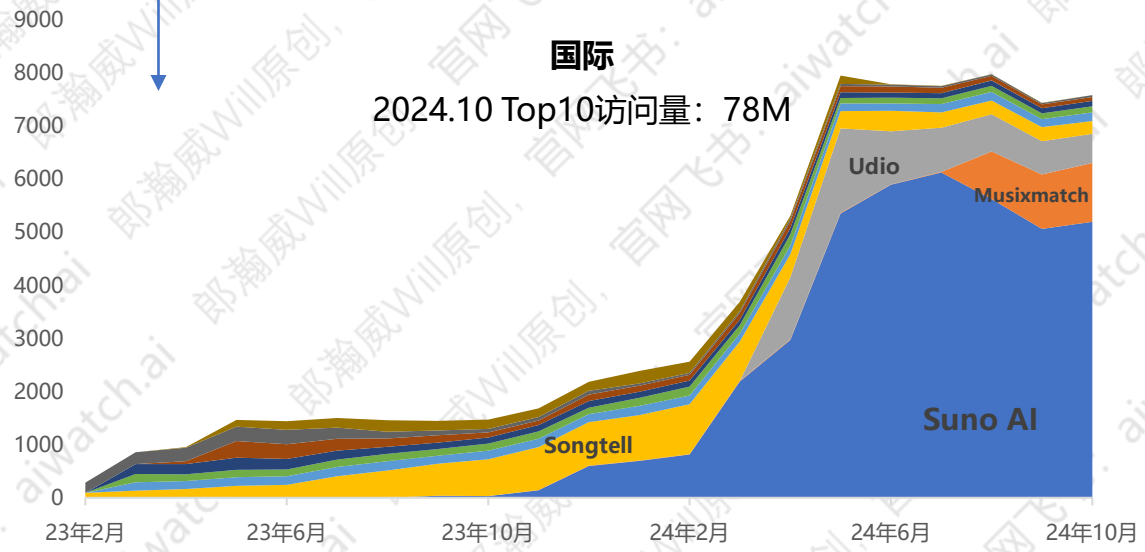
序号	产品名称	24年10月 (万visit)
1	Noisee	29

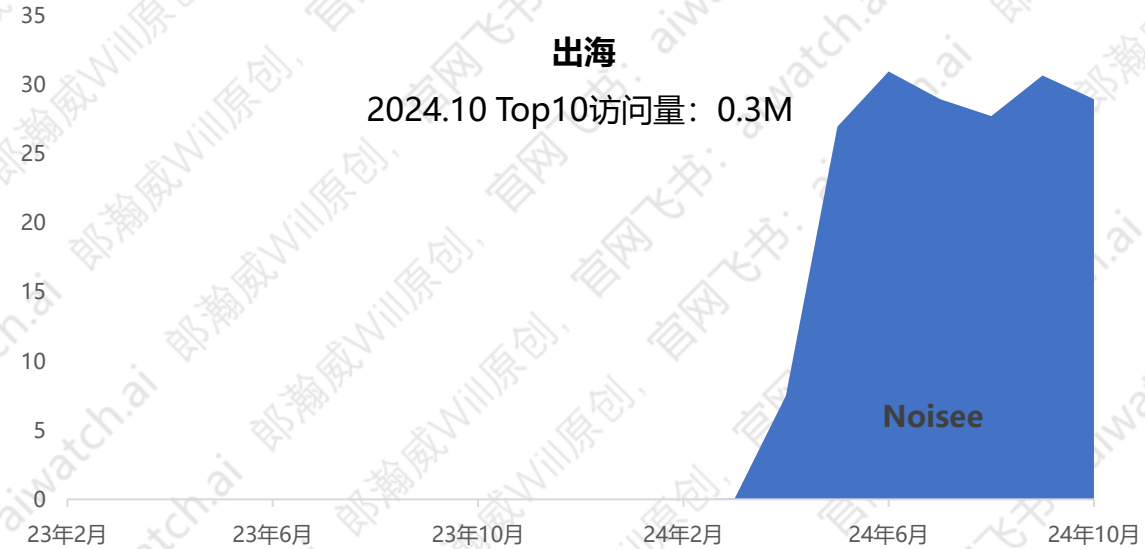
数据来源：similarweb 单位：万visit

音乐 国际 97.7% | 国产 2.1% | 出海 0.2%



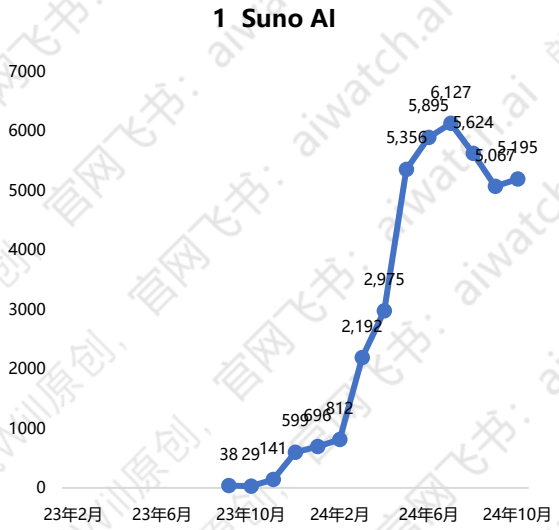


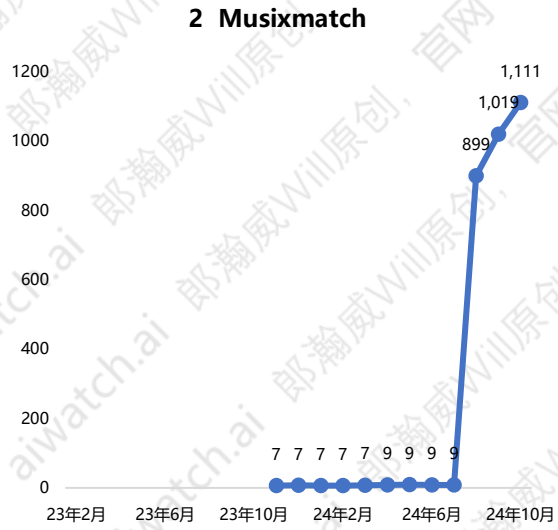


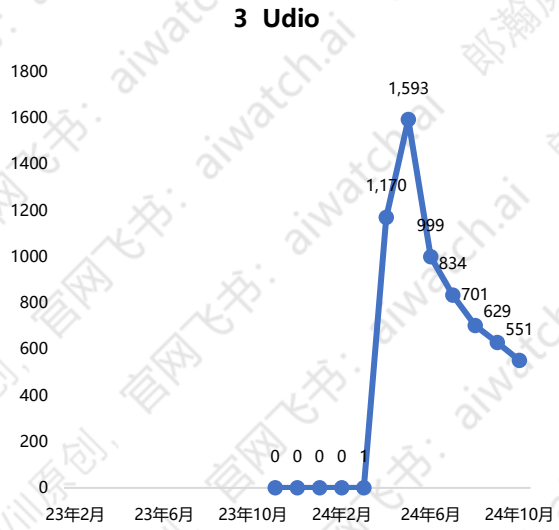


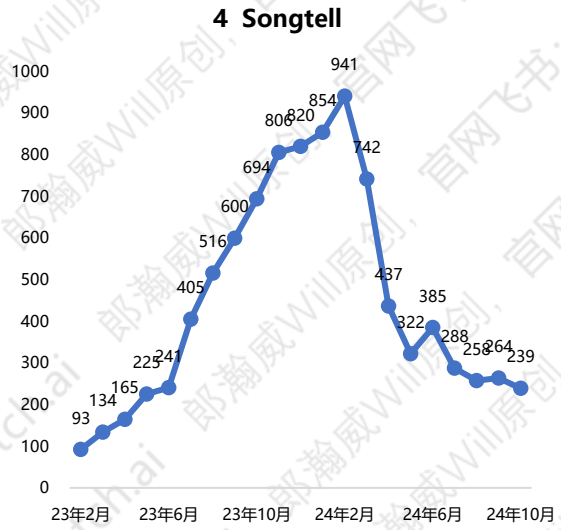
数据来源：similarweb 单位：万visit

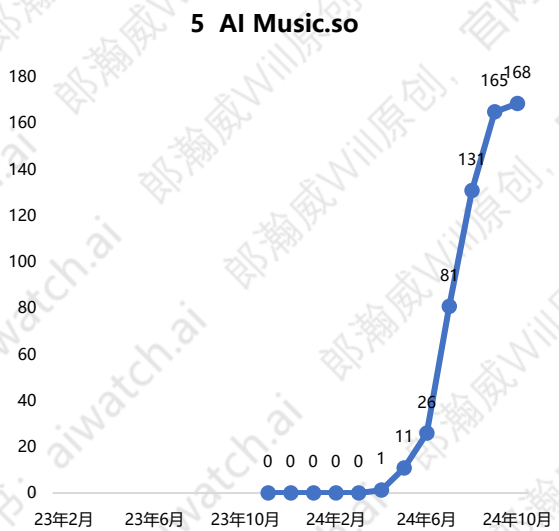
音乐 No.1-No.8

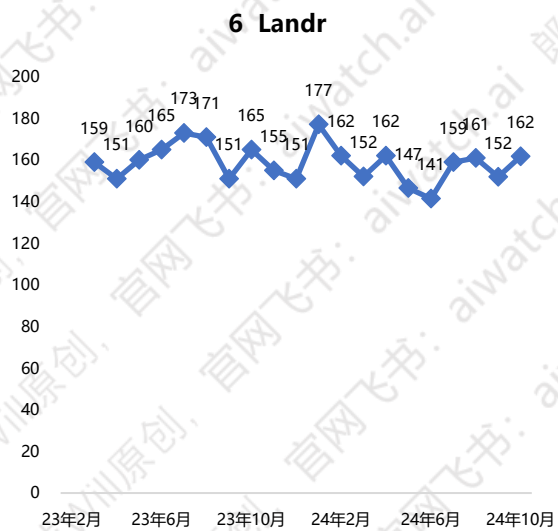


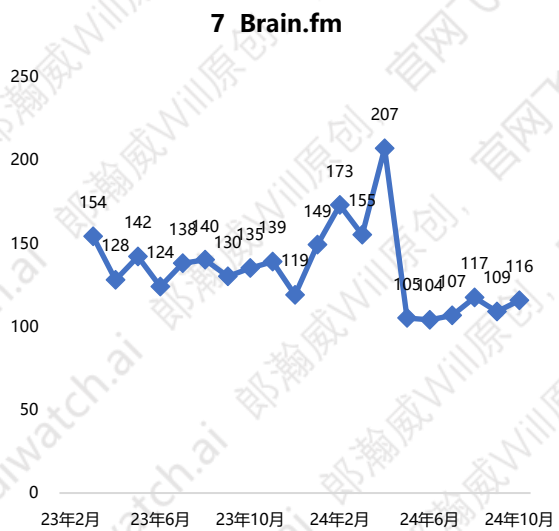


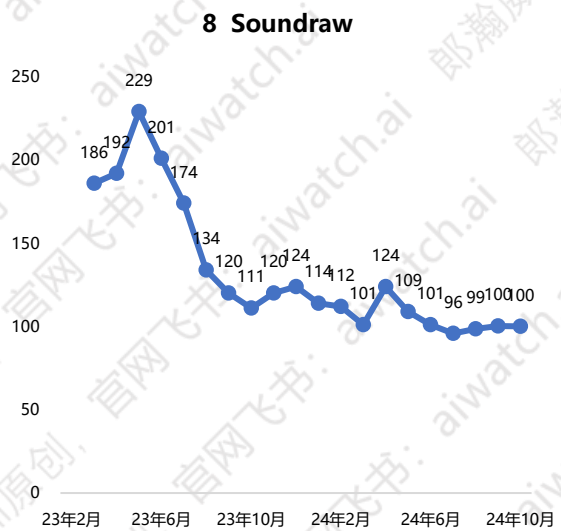






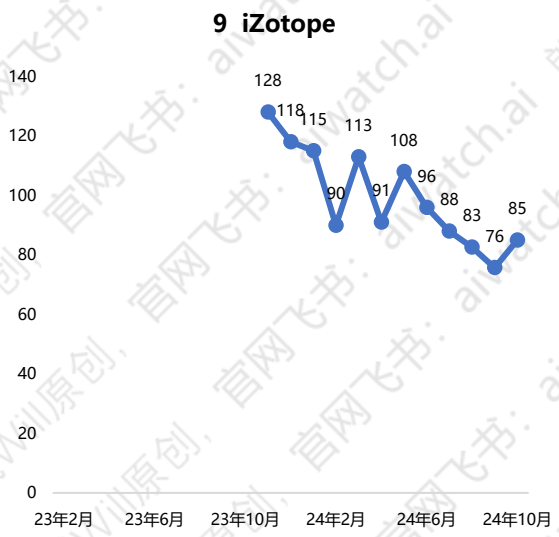


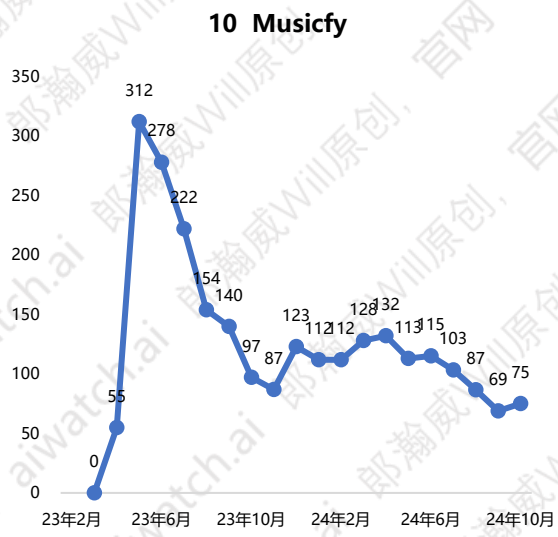


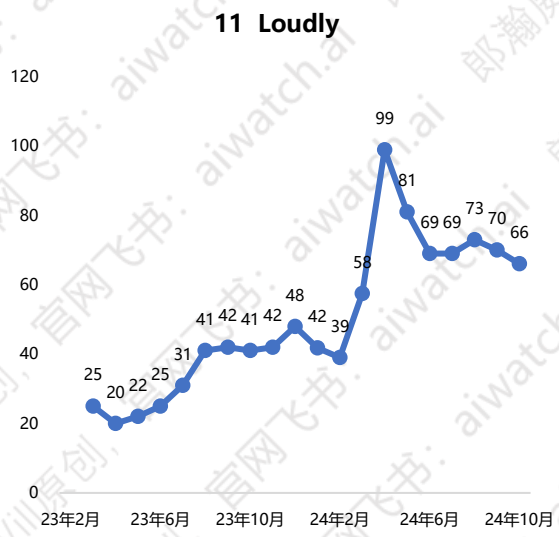


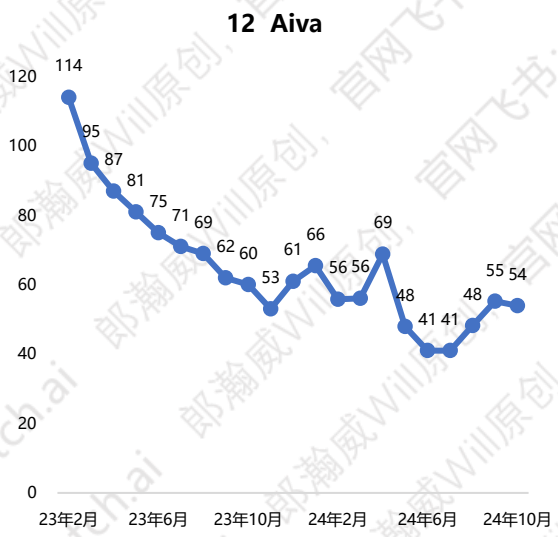
数据来源：similarweb 单位：万visit

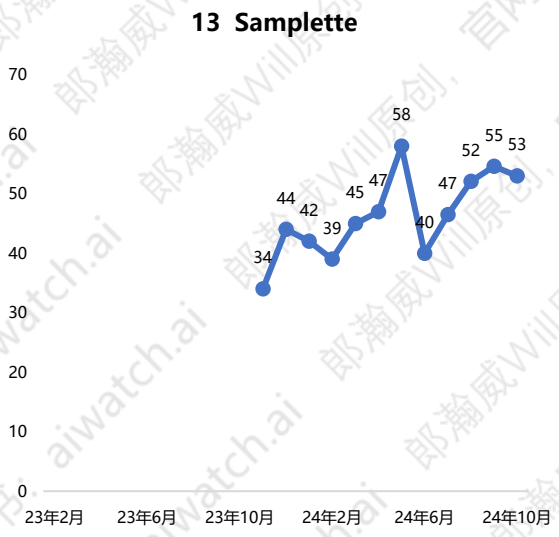
音乐 No.9-No.16

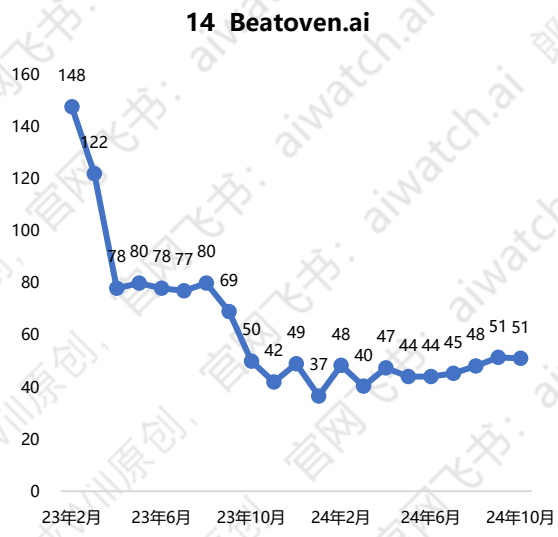


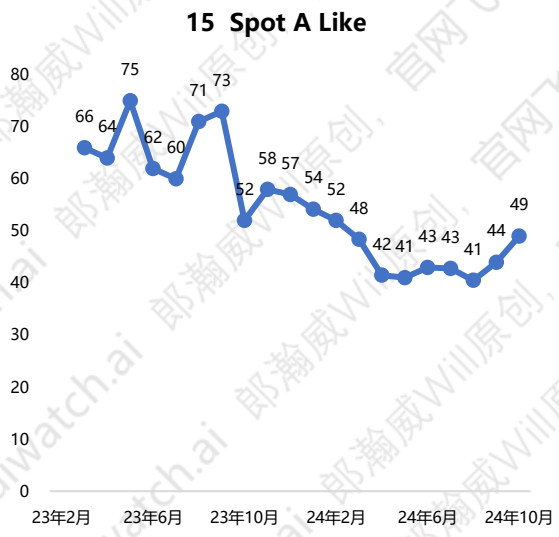


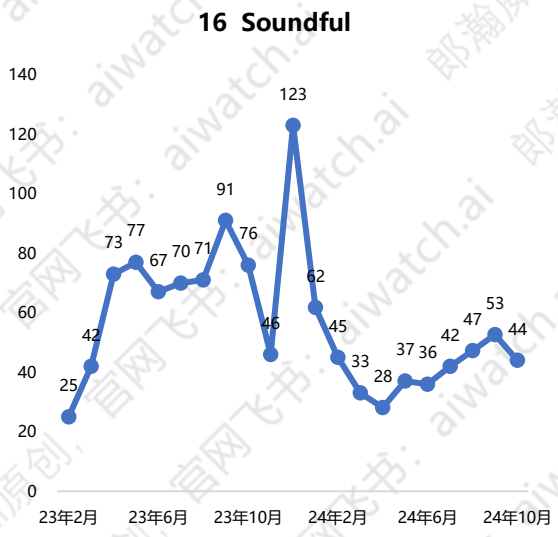






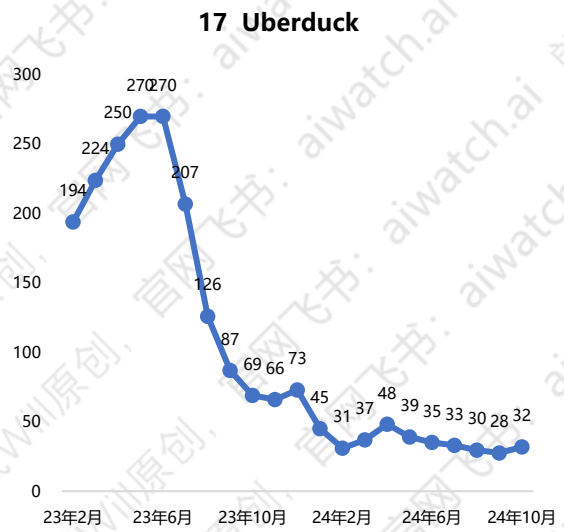


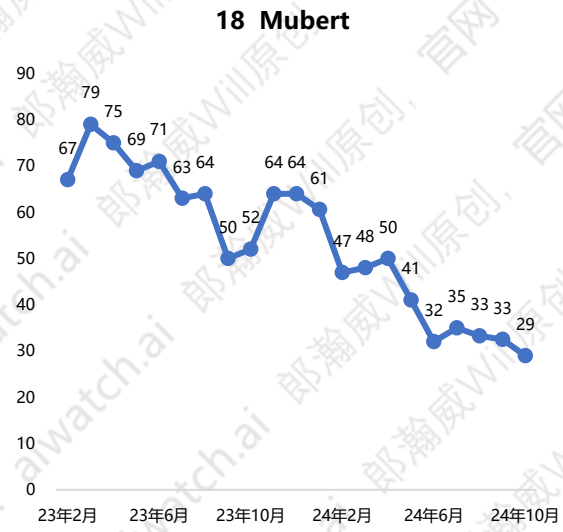


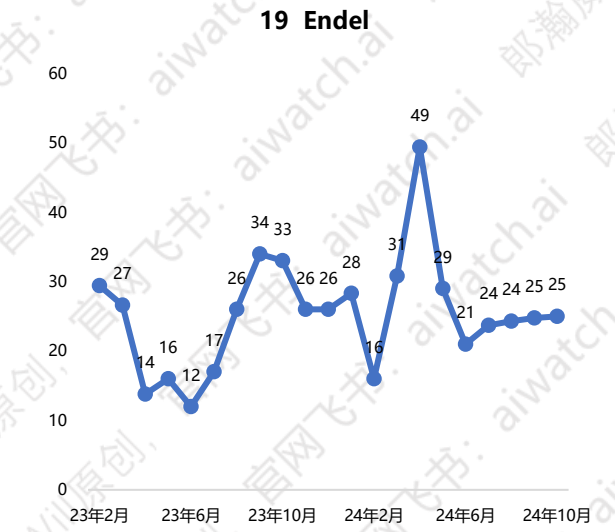


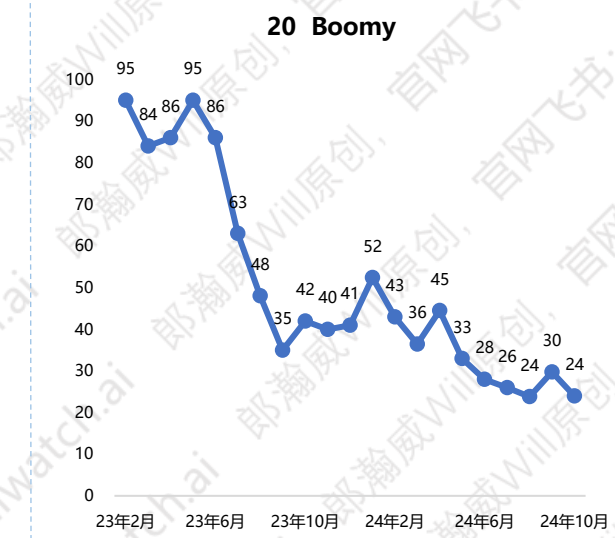
数据来源：similarweb 单位：万visit

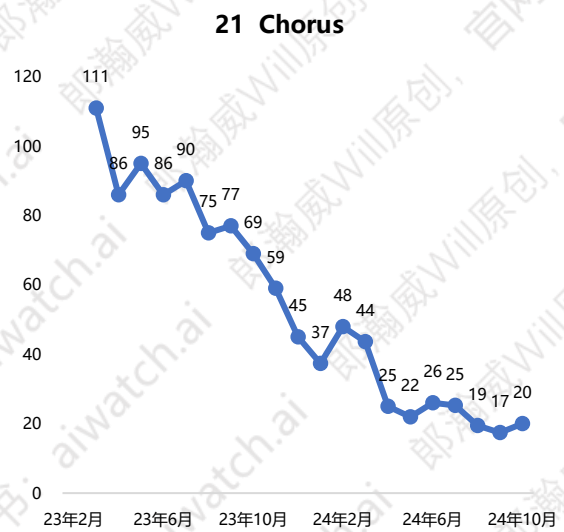
音乐 No.17-No.24

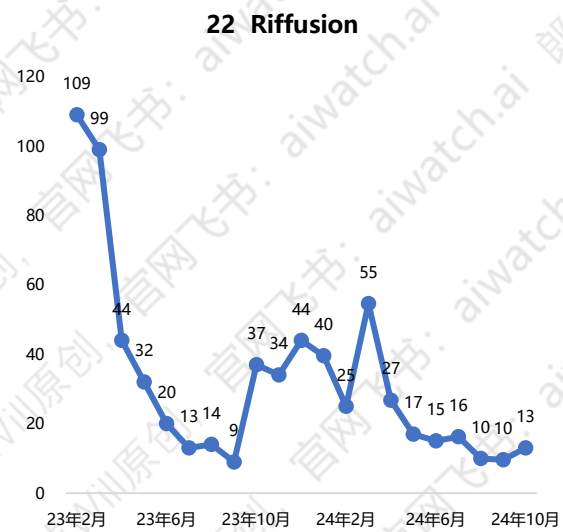


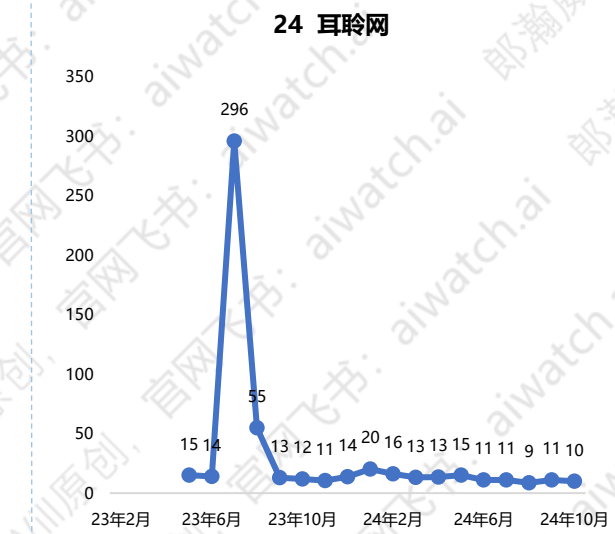






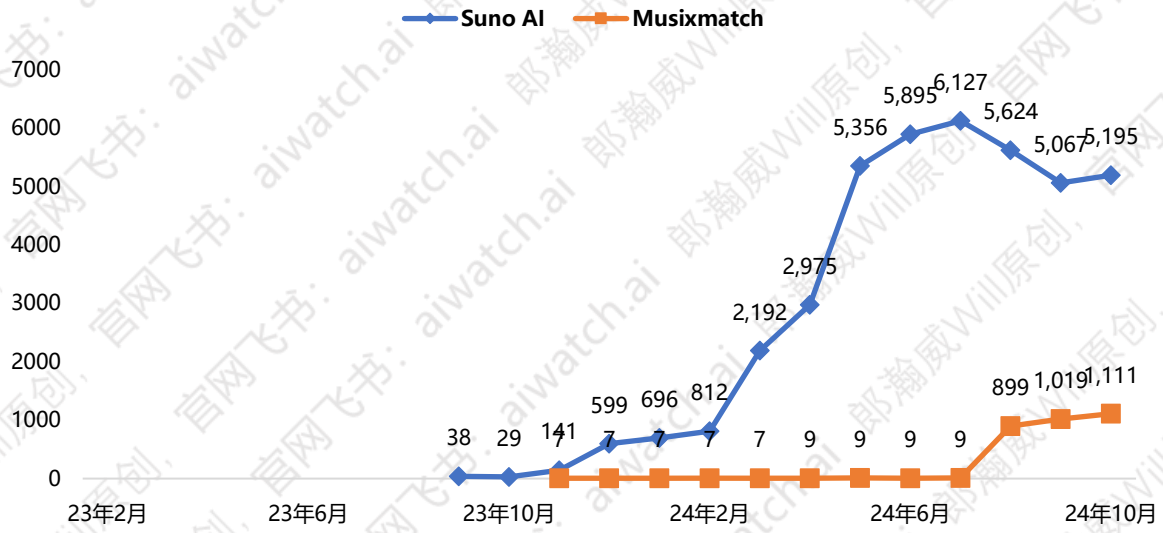


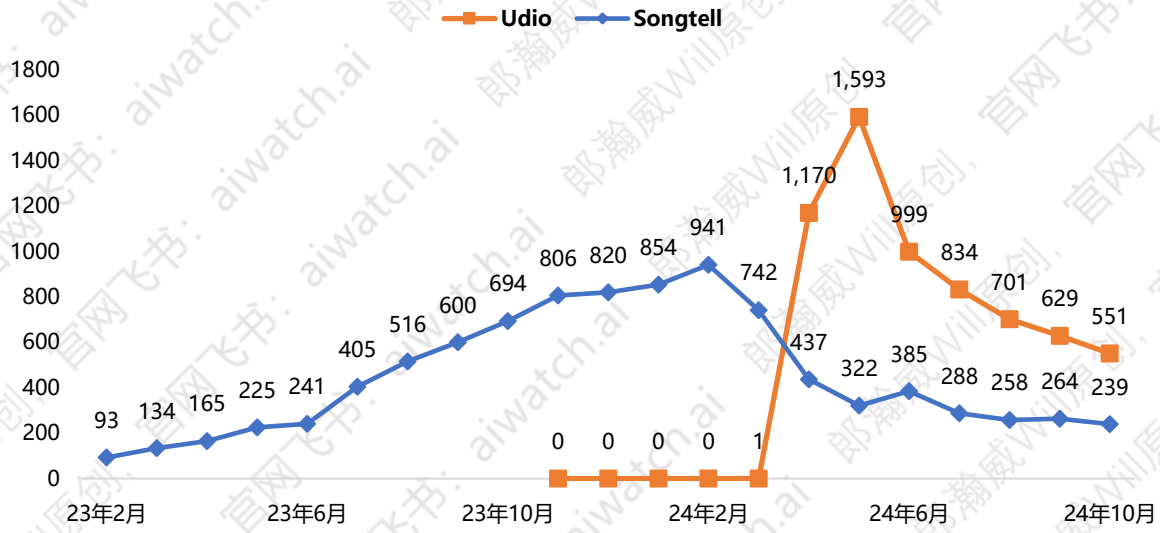


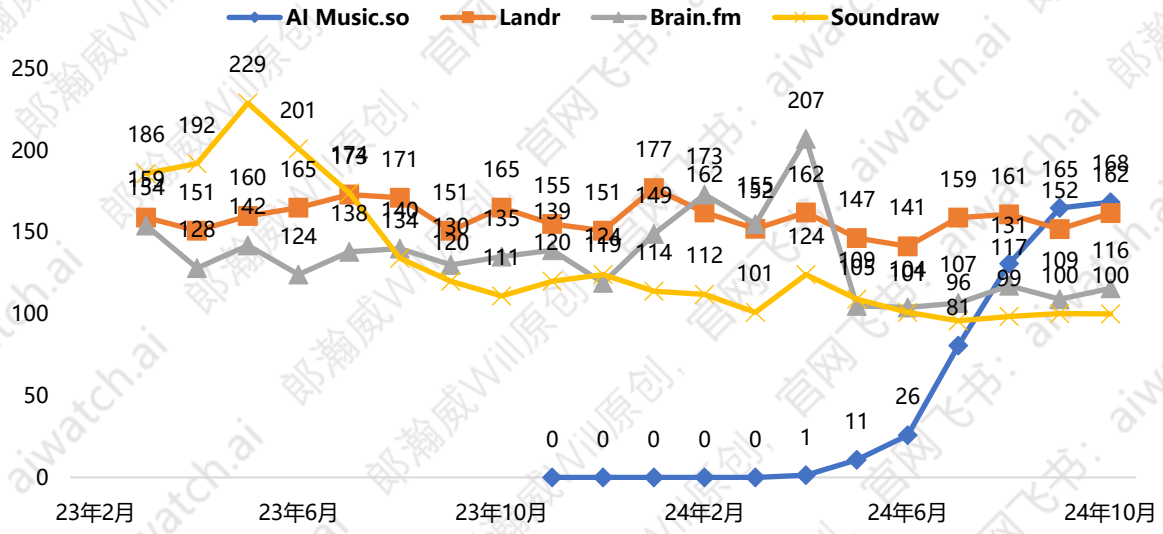


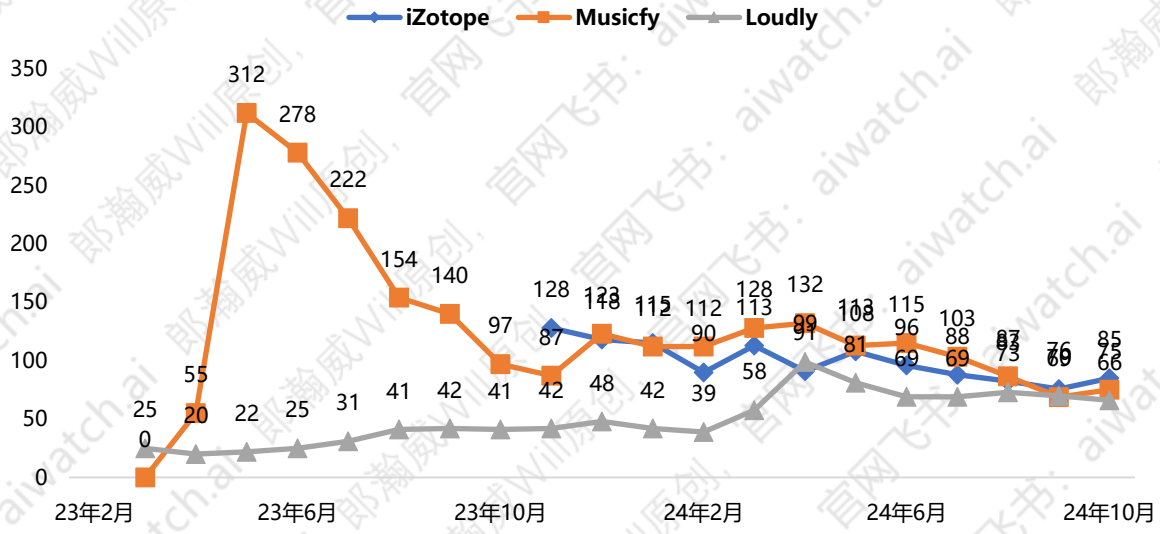
数据来源：similarweb 单位：万visit

音乐 复合图表









数据来源：similarweb 单位：万visit

文字转音频

文字转音频

文字转音频 – Takeaway

1. TTS是一个历史较久的领域，这里仅统计官网访问量，并未统计API等数据
2. TTS在2025年玩法可能会迎来爆发。感兴趣的可以去研究下11labs的产品，已经不仅仅是tts本身
3. 2024年10月文字转音频赛道TOP15总访问量达到4501万次访问，行业整体保持稳定增长趋势。
4. Eleven Labs、Azure tts和Speechify占据前三名，访问量分别为1403万、741万和492万次，其中Eleven Labs稳居第一继续扩大领先优势。
5. 从增长表现看，TTSMaker和SpeechGen.io分别实现94%和90%的高速增长，但部分老牌产品如Speechify、Murf AI出现明显下滑，分别下降29%和53%。
6. 融资方面，Eleven Labs获得B轮8000万美元最为亮眼，紧随其后的是AssemblyAI的5000万美元和PlayHT的2100万美元融资。
7. 从市场布局看，美国产品占主导地位，但来自巴西、印度、印尼等新兴市场的产品也在快速崛起，呈现多元化竞争格局。
8. 值得注意的是，行业正在向更专业化的方向发展，如Podcaste专注播客配音，PlayHT针对游戏配音，产品定位更加清晰。
9. 整体来看，该赛道正从单一的文字转语音工具，逐渐向多场景、多语种、高自然度的全方位解决方案转型，应用场景不断拓展。

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

文字转音频 - Top15

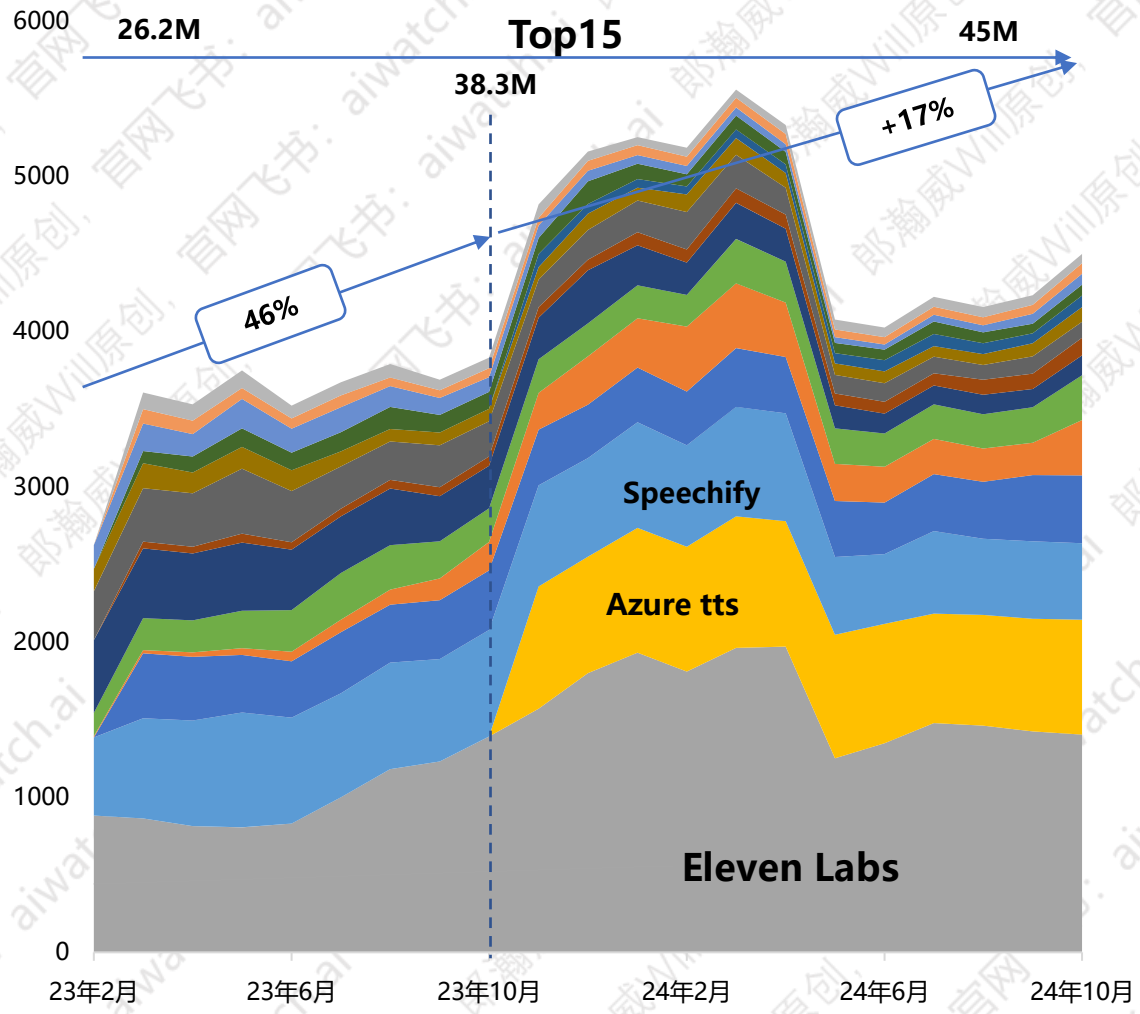
- **TOP15 总融资额：1.7亿美元** (Eleven Labs (Eleven Labs 80M$)+PlayHT (PlayHT 21M$)+Podcastle (Podcastle 13.5M$)+Resemble (Resemble 8M$)+AssemblyAI (AssemblyAI 50M$)=172.5M$)
- **Top15 总网页流量：4501万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Eleven Labs	1,390	1,403	1%	Eleven Labs	B轮	2024/1/22	80	80	United States	15%
2	Azure tts		741	-	微软	-	-	-	-	United States	20%
3	Speechify	688	492	-29%	Speechify	-	-	-	-	United States	45%
4	NaturalReaders	383	439	15%	NaturalSoft	-	-	-	-	United States	38%
5	TTSMaker	183	356	94%	TTSMaker	-	-	-	-	Indonesia	8%
6	PlayHT	218	290	33%	PlayHT	种子轮	2024/11/25	21	-	United States	16%
7	Murf AI	274	128	-53%	Murf AI	-	-	-	-	United States	19%
8	SpeechGen.io	59	112	90%	SpeechGen.io	-	-	-	-	Brazil	8%
9	FakeYou	227	104	-54%	FakeYou	-	-	-	-	United States	27%
10	Voicemaker	81	95	17%	Voicemaker	-	-	-	-	India	31%
11	Podcastle		74	-	Podcastle	A轮	2024/2/1	13.5	-	United States	38%
12	LOVO AI	109	70	-36%	LOVO AI	-	-	-	-	United States	14%
13	Resemble	96	70	-27%	Resemble	A轮	2023/7/12	8	-	United States	13%
14	AssemblyAI	57	67	18%	AssemblyAI	A轮	2023/12/3	50	17	Brazil	27%
15	Typecast AI	68	61	-10%	Typecast AI	-	-	-	-	Korea	78%

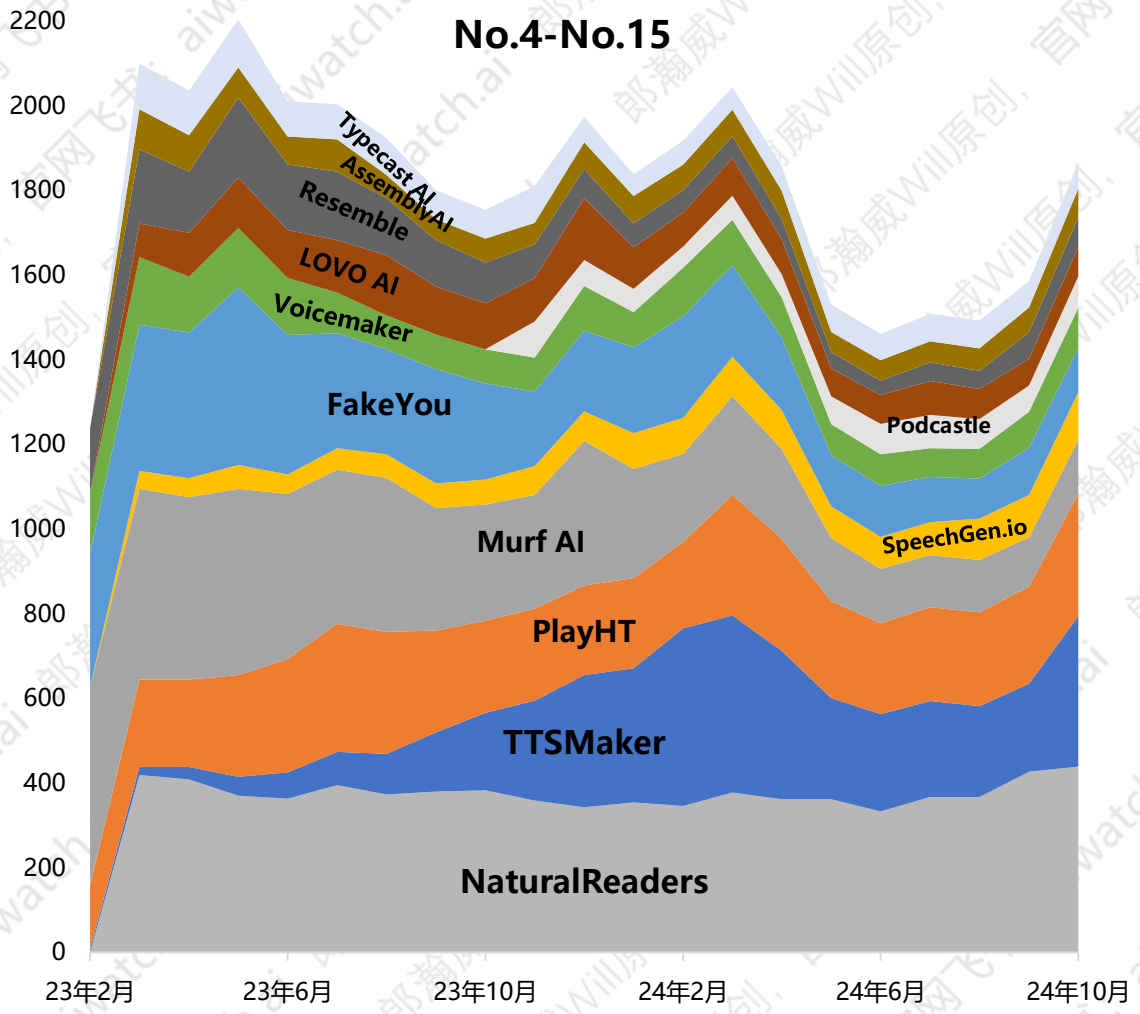
数据来源：similarweb 单位：万visit

文字转音频 网页流量趋势 10月总量：4501万

- Eleven Labs保持稳定领先地位，Azure tts和Speechify形成第一梯队。虽然整体增速放缓，但市场规模仍在稳步扩张，三者合计月访问量超过2600万，占据了半数以上的市场份额。



- 在第4-15名的竞争格局中，NaturalReaders(439万访问)和TTSMaker(356万访问)发展势头强劲，增长稳健。而PlayHT、Murf AI等老牌玩家则呈现出不同程度的份额波动，反映出第二梯队竞争的激烈程度。

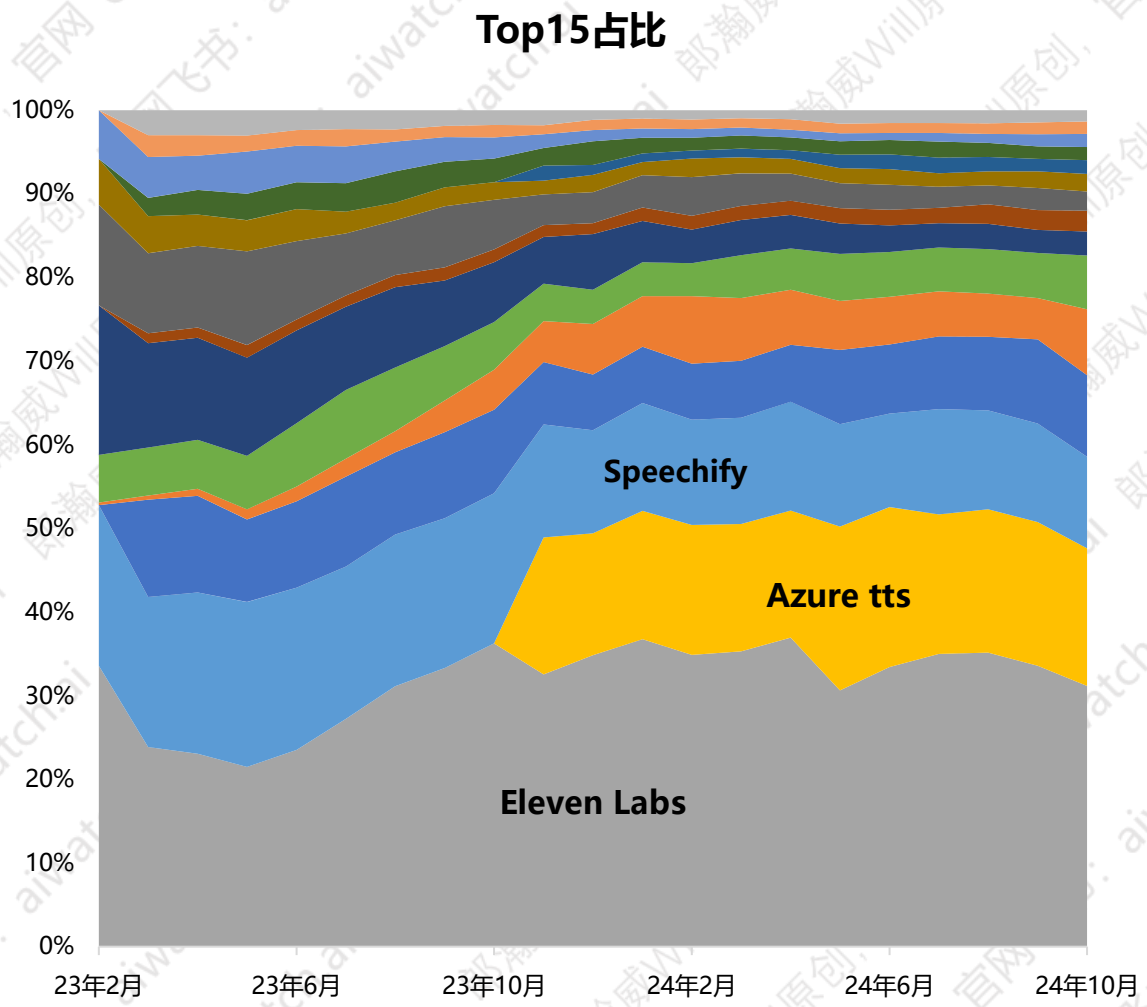


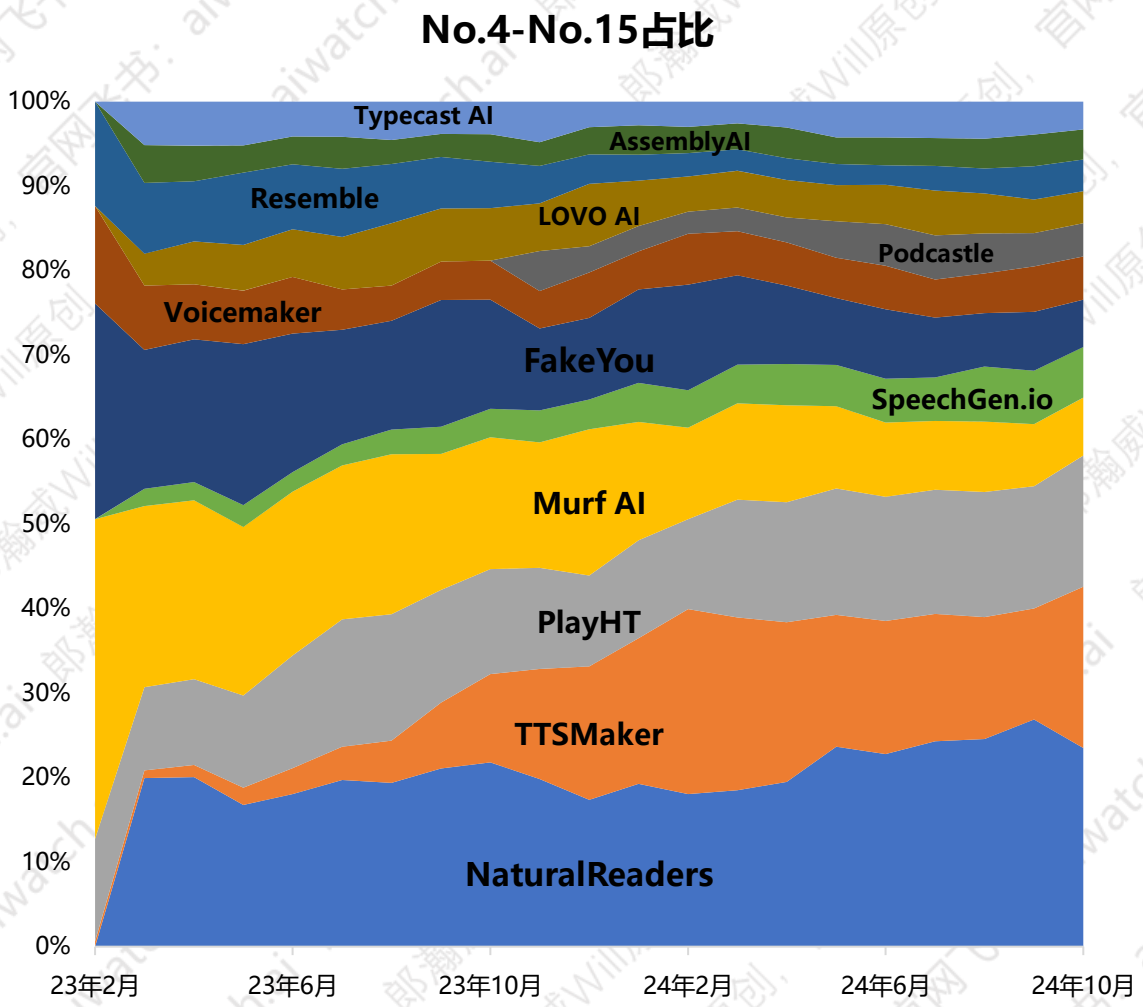
数据来源：similarweb 单位：万visit

文字转音频 2023.2~2024.10 网页流量占比

- Top15占比分析：Eleven Labs的市场主导地位保持稳定，Azure tts的快速崛起为市场注入新活力。整体市场格局相对稳定，头部企业的竞争优势明显。

- 4-15名占比分析：NaturalReaders和TTSMaker在第二梯队中表现突出，逐渐形成稳定竞争格局。新进入者如Podcastle等虽规模较小，但增长势头良好，为市场带来新的可能性。





数据来源：similarweb 单位：万visit

文字转音频 国际 | 国产 | 出海 Top10

国际

- Eleven Labs领先(1403万访问)，欧美产品占据主导

序号	产品名称	24年10月(万visit)
1	Eleven Labs	1,403
2	Azure tts	741
3	Speechify	492
4	NaturalReaders	439
5	TTSMaker	356
6	PlayHT	290
7	Murf AI	128
8	SpeechGen.io	112
9	FakeYou	104
10	Voicemaker	95

国产

- 整体规模较小，市场有待开发

序号	产品名称	24年10月(万visit)
1	一视同人数字分身	-

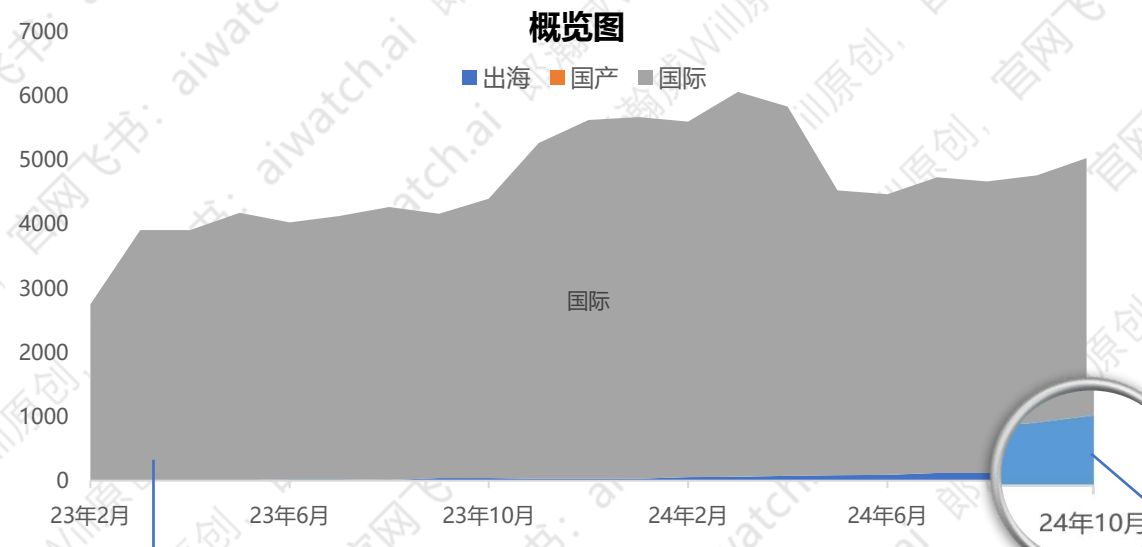
出海

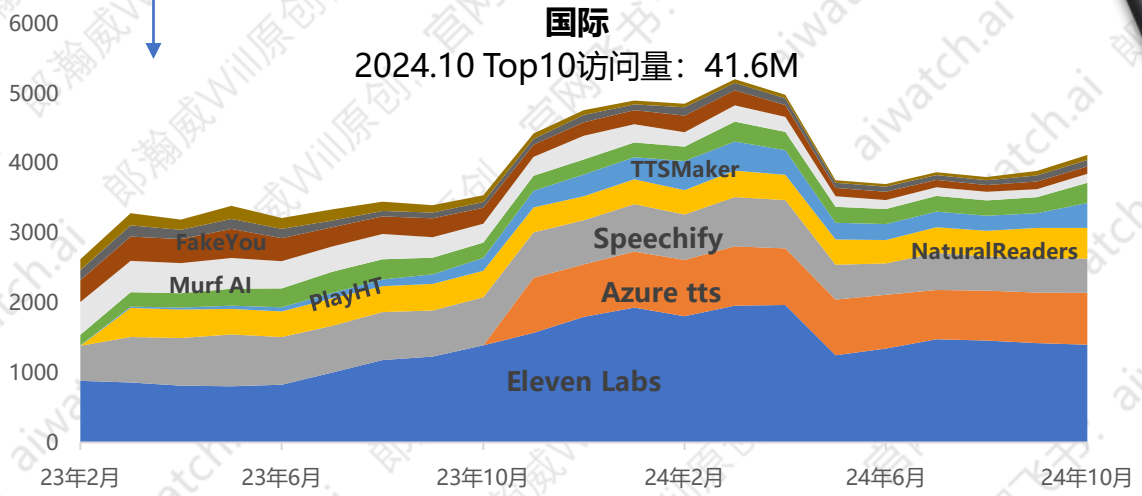
- DupDub领跑(56万访问)但规模较小，发展空间广阔

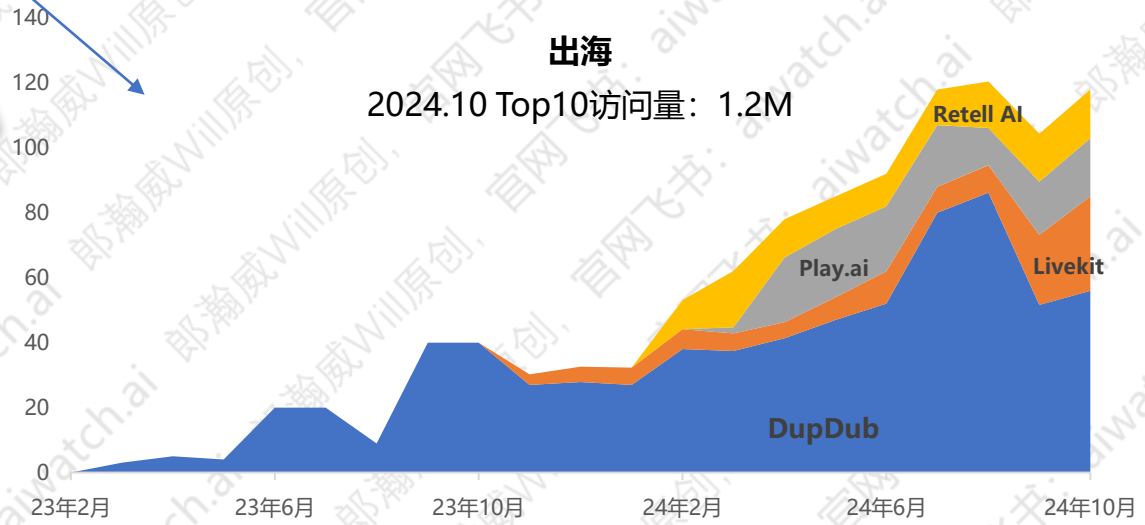
序号	产品名称	24年10月(万visit)
1	DupDub	56
2	Livekit	29
3	Play.ai	18
4	Retell AI	15

数据来源：similarweb 单位：万visit

文字转音频 国际 99% | 国产 0% | 出海 1%

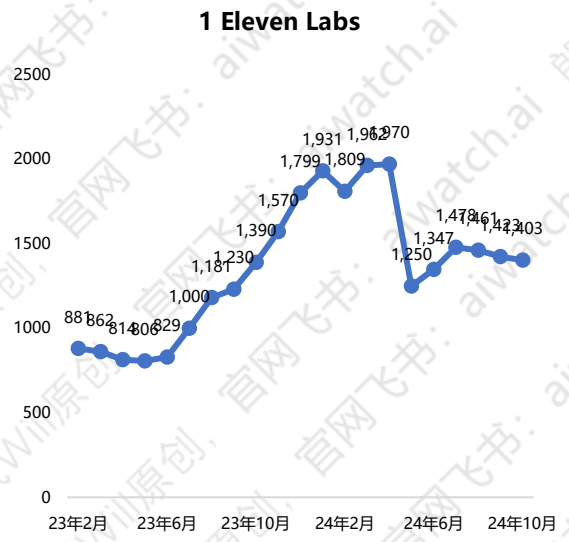


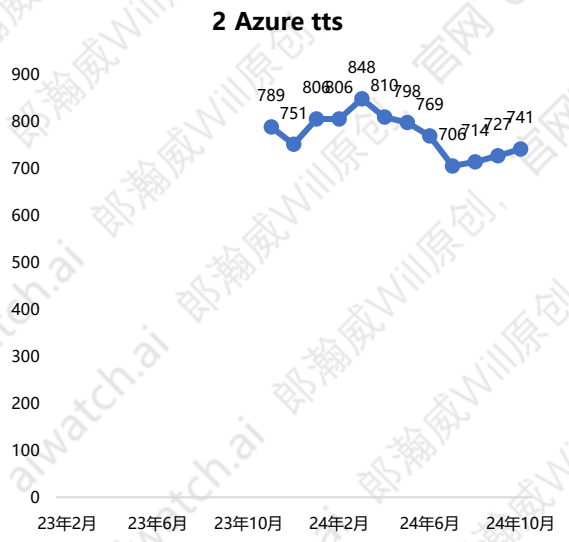


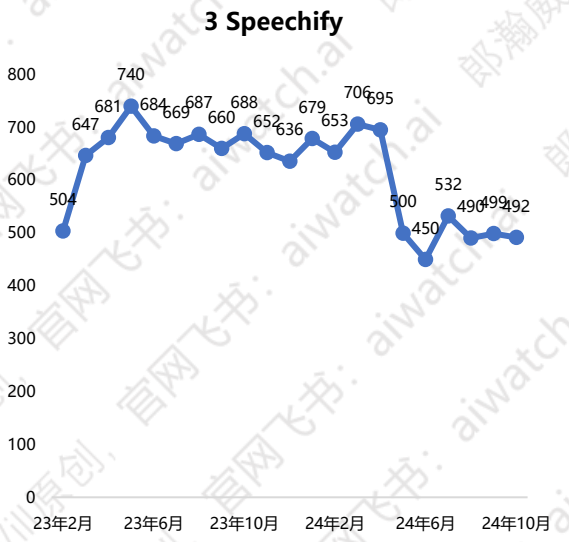


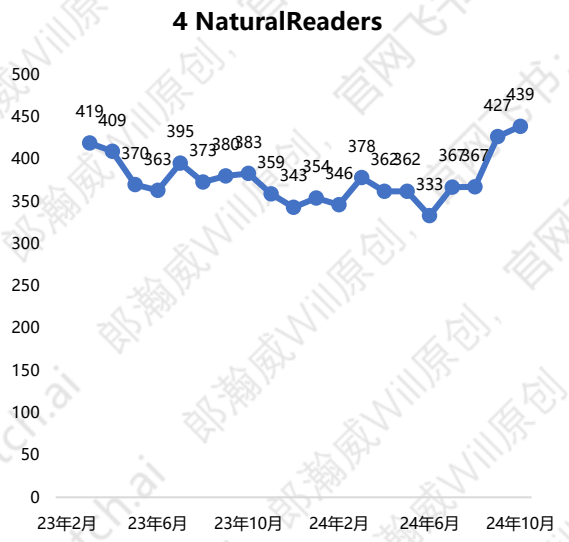
数据来源：similarweb 单位：万visit

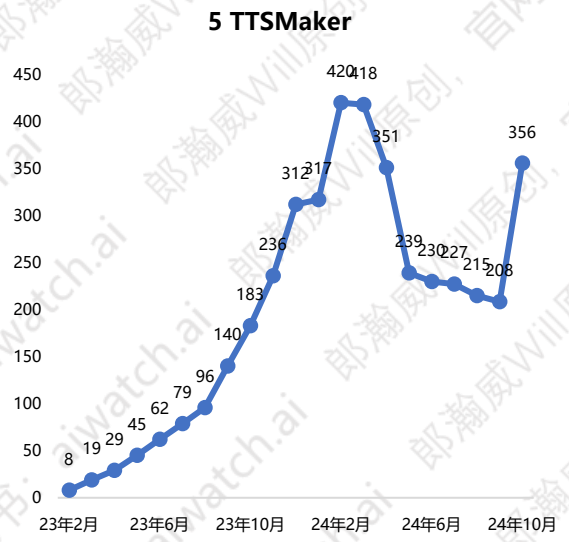
文字转音频 No.1-No.8

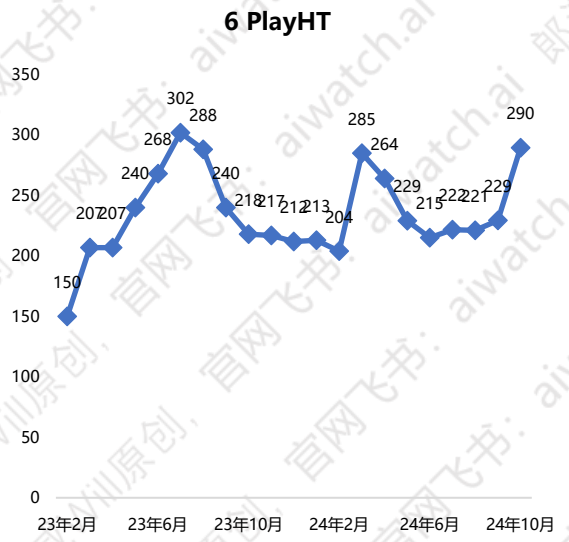


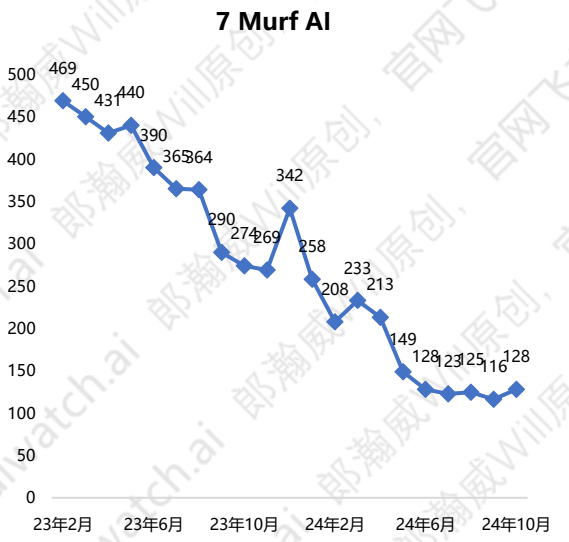


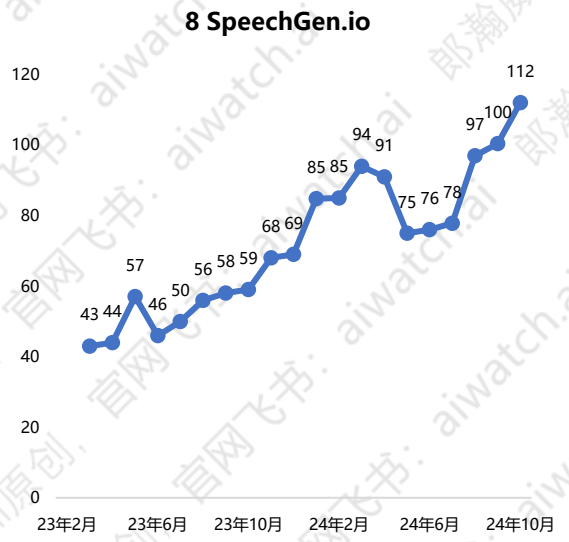












数据来源：similarweb 单位：万visit

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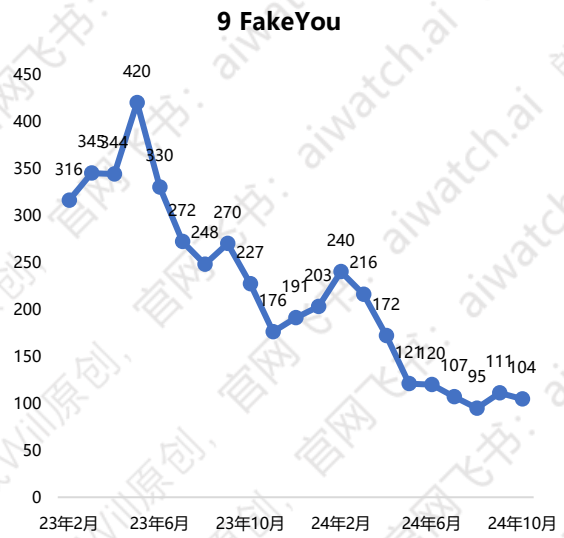

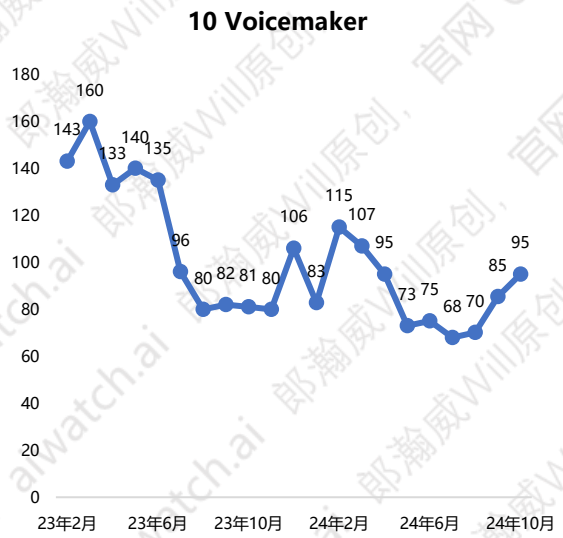

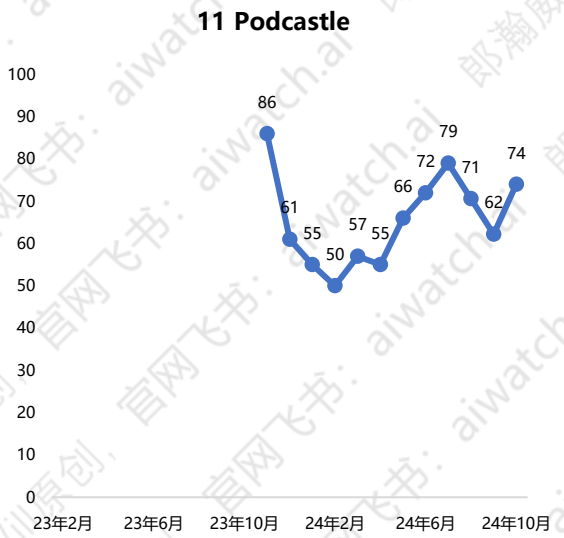

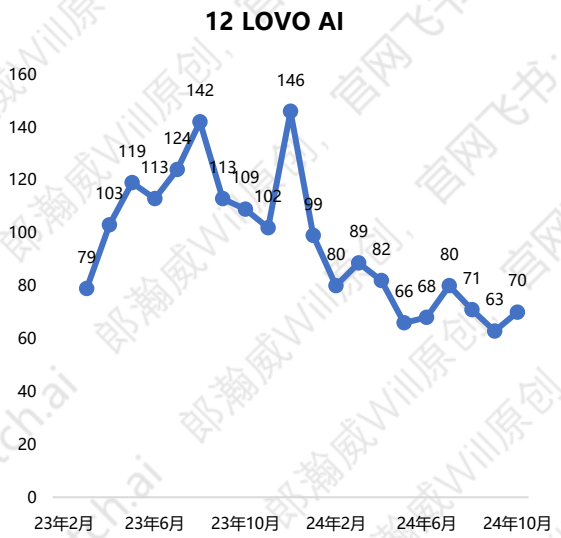

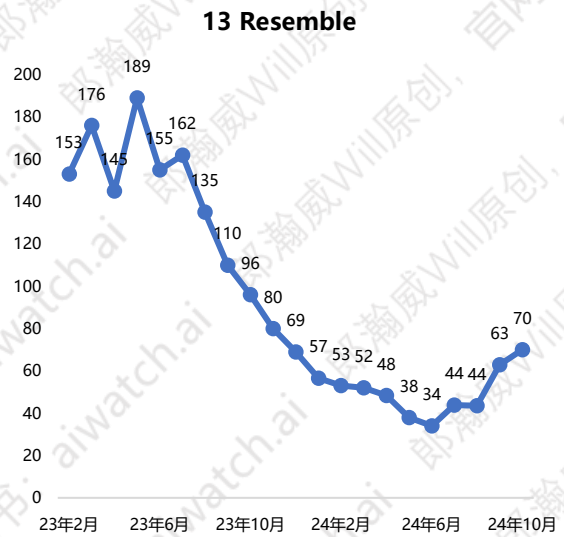

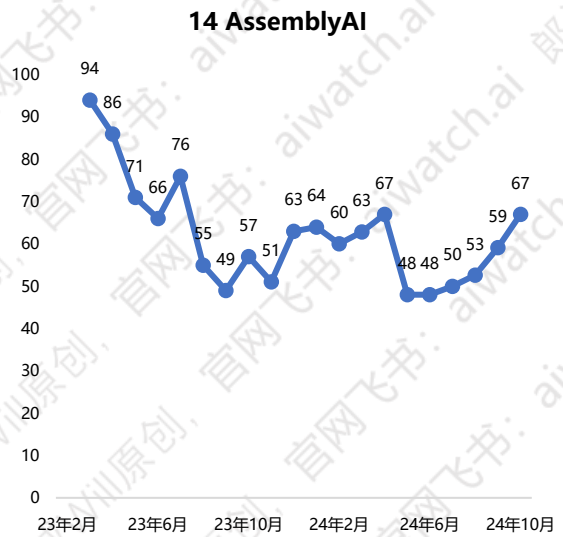

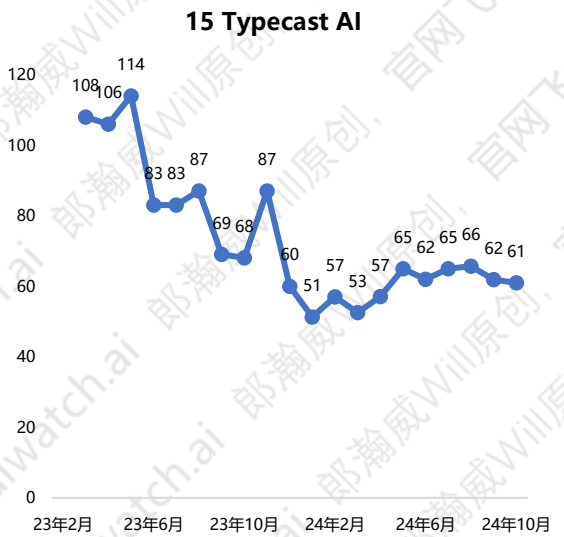

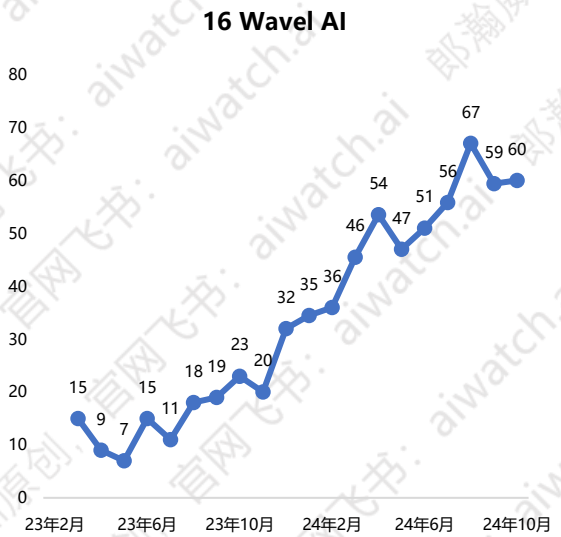

数据来源：similarweb 单位：万visit

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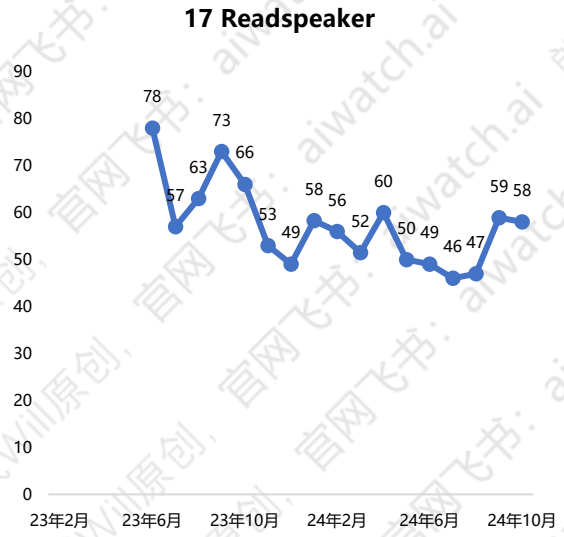
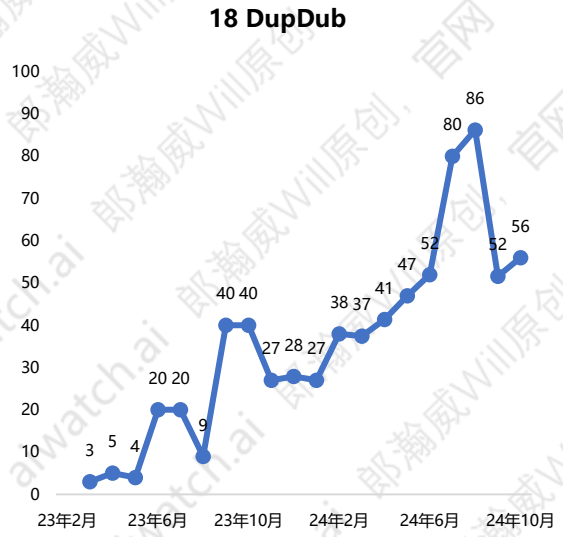
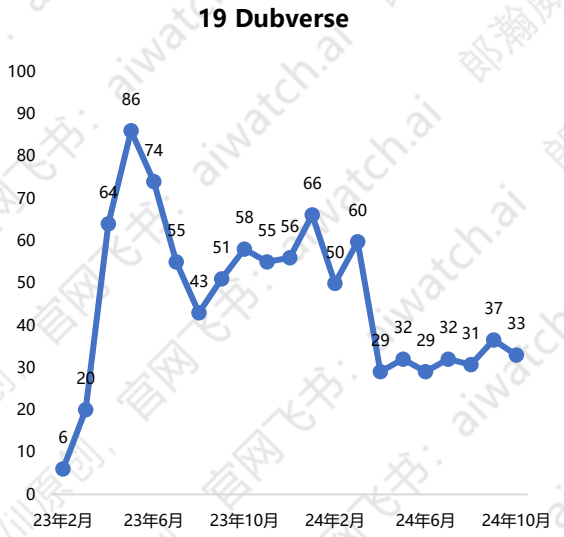
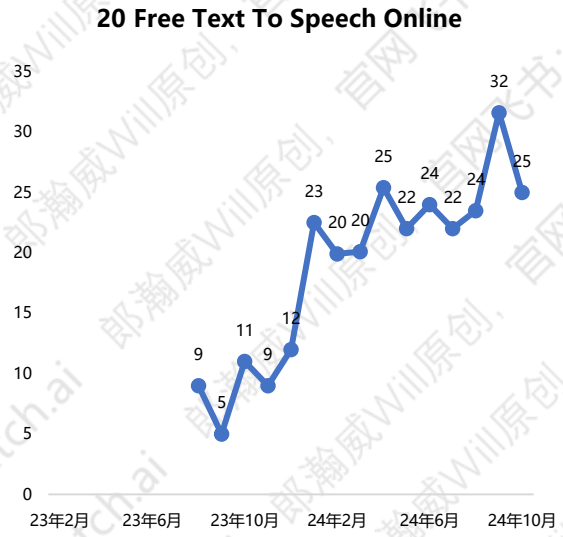
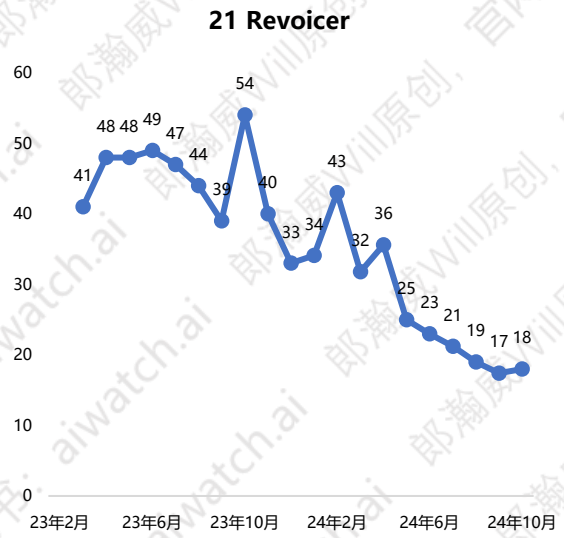
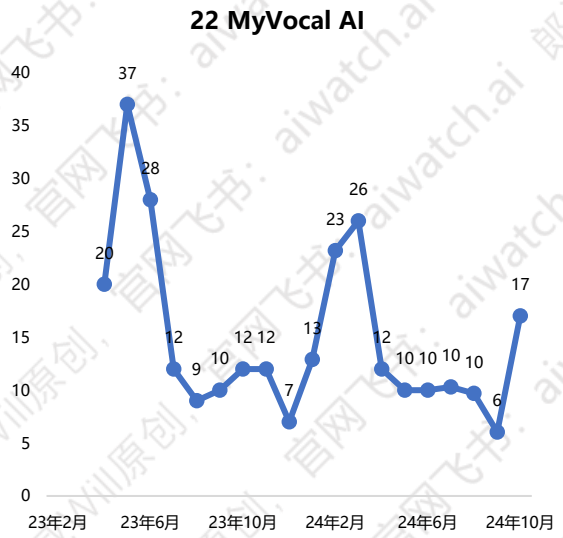


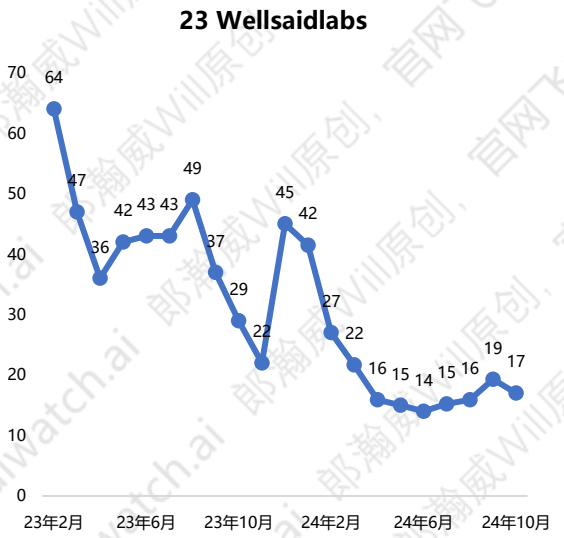


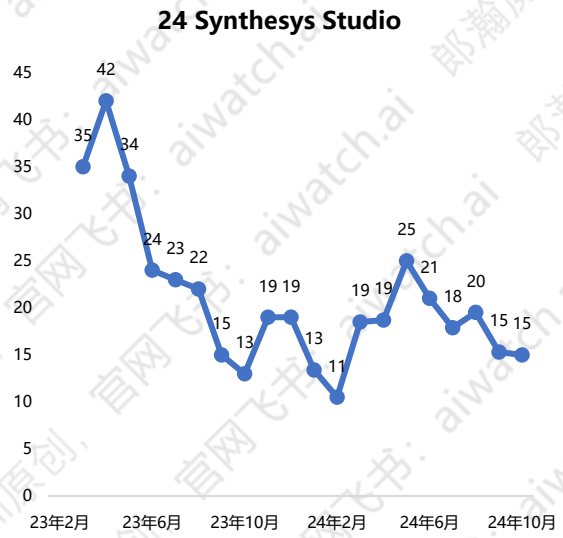






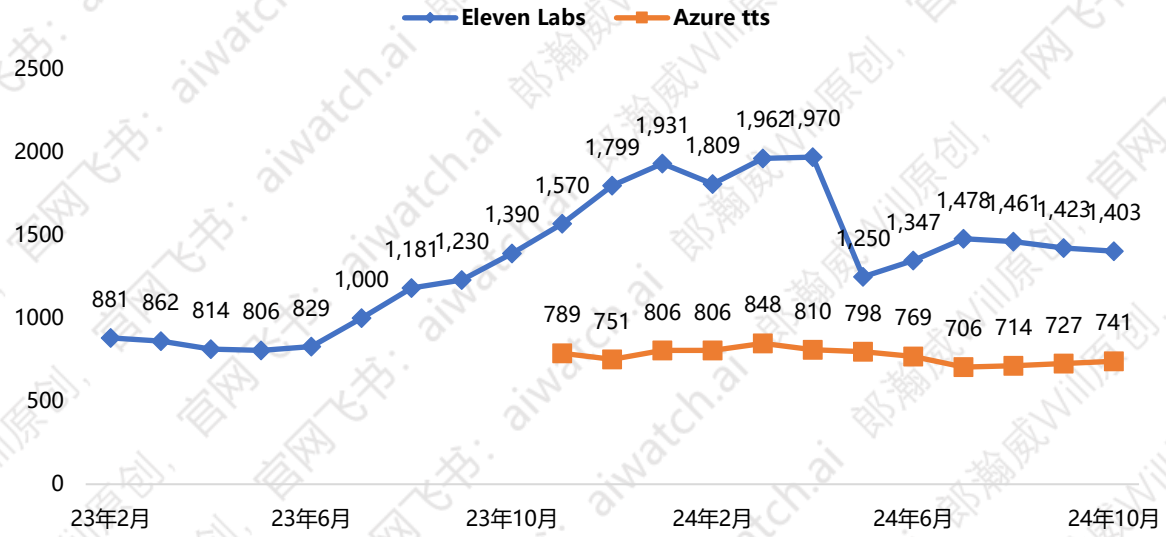


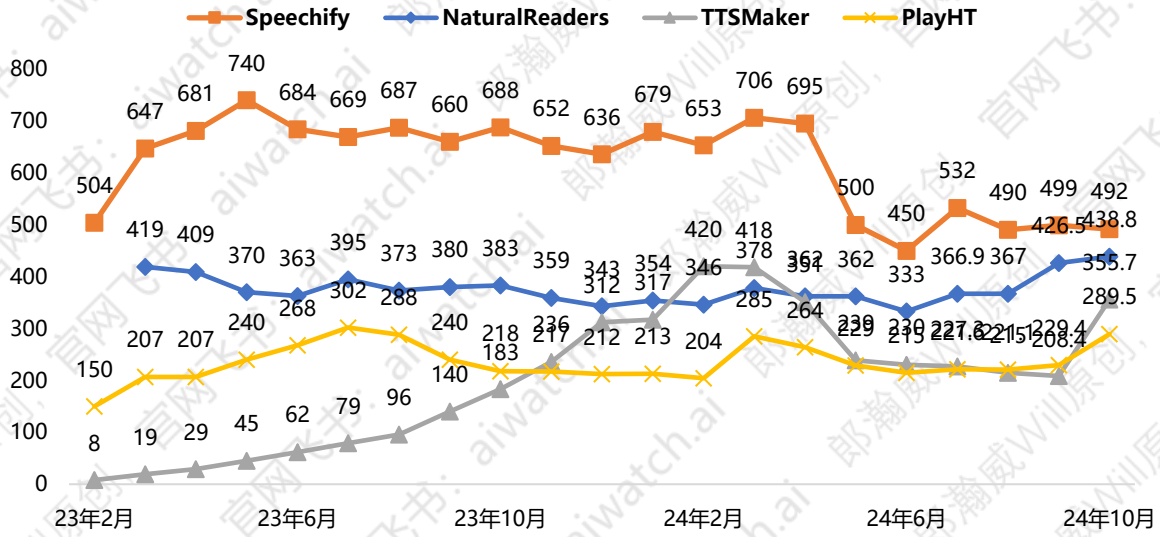


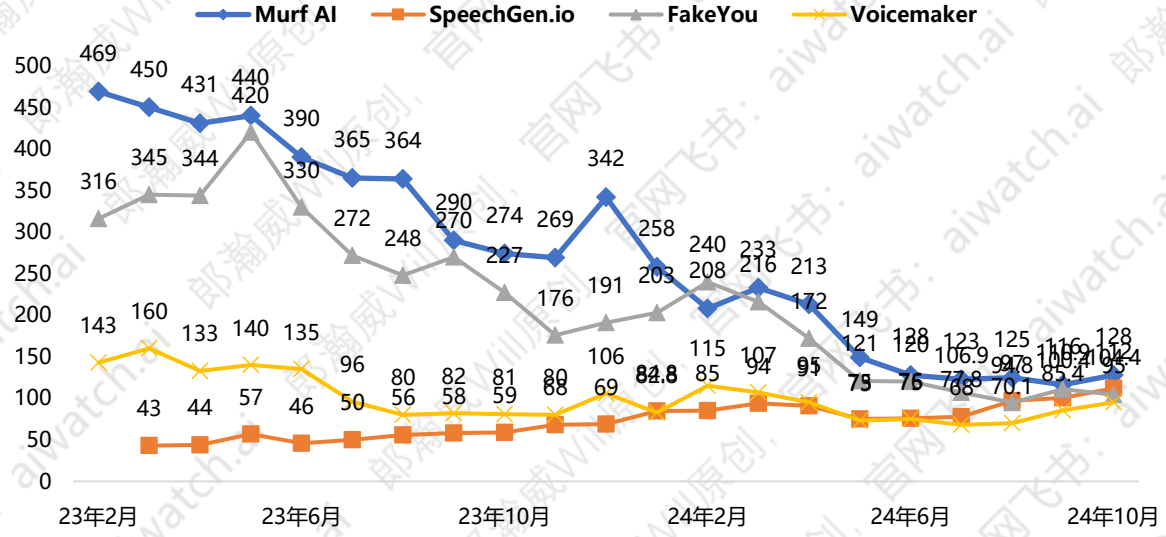


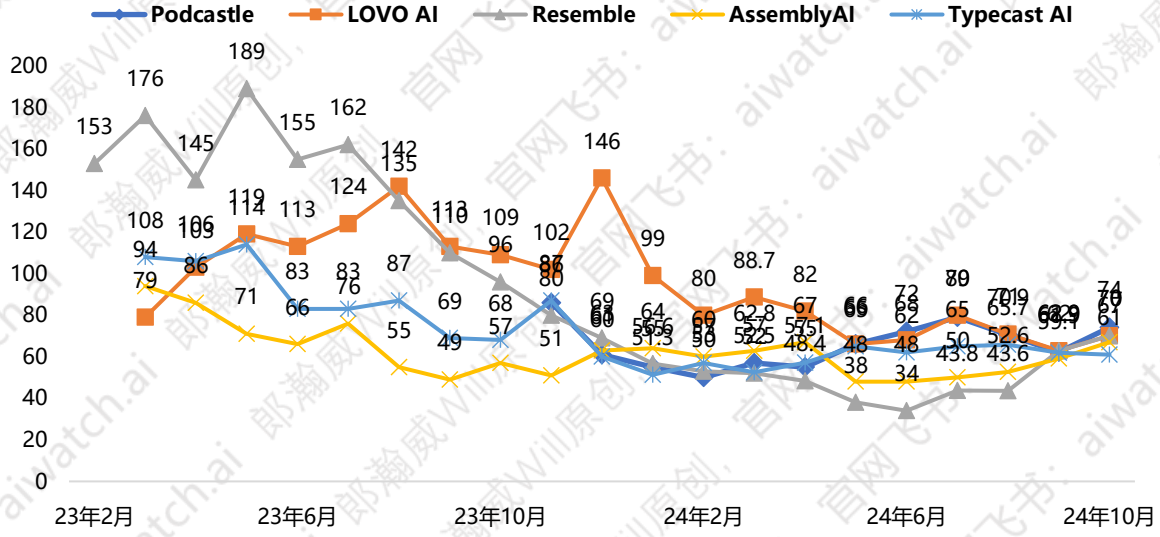
数据来源：similarweb 单位：万visit

文字转音频 复合图表









数据来源：similarweb 单位：万visit

3D-模型生成

3D-模型生成

3D-模型生成 – Takeaway

1. 2024年10月，3D模型生成赛道Top5产品的总访问量达到1099万次，该赛道的整体规模正在扩大。
2. 前三名分别是Luma AI、Meshy-1和Tripo，其中Luma AI以875万次访问量遥遥领先，占据总流量的13%。
3. 增速方面，Luma AI表现最为亮眼，同比增长1099%，Meshy-1也实现了675%的显著增长。
4. 近期融资情况，Luma AI在2024年1月完成4300万美元B轮融资，Kaedim在2024年3月完成1500万美元A轮融资。
5. Tripo作为新兴玩家，凭借200万美元的ARR，显示出较强的商业变现能力，为整个赛道提供了新的增长范例。
6. 在出海赛道上，Meshy和Tripo分别以124万和76万的月访问量位居前两名，反映出中国企业在全球市场的竞争力正在提升。

数据来源：similarweb 单位：万visit

3D-模型生成 – Top6

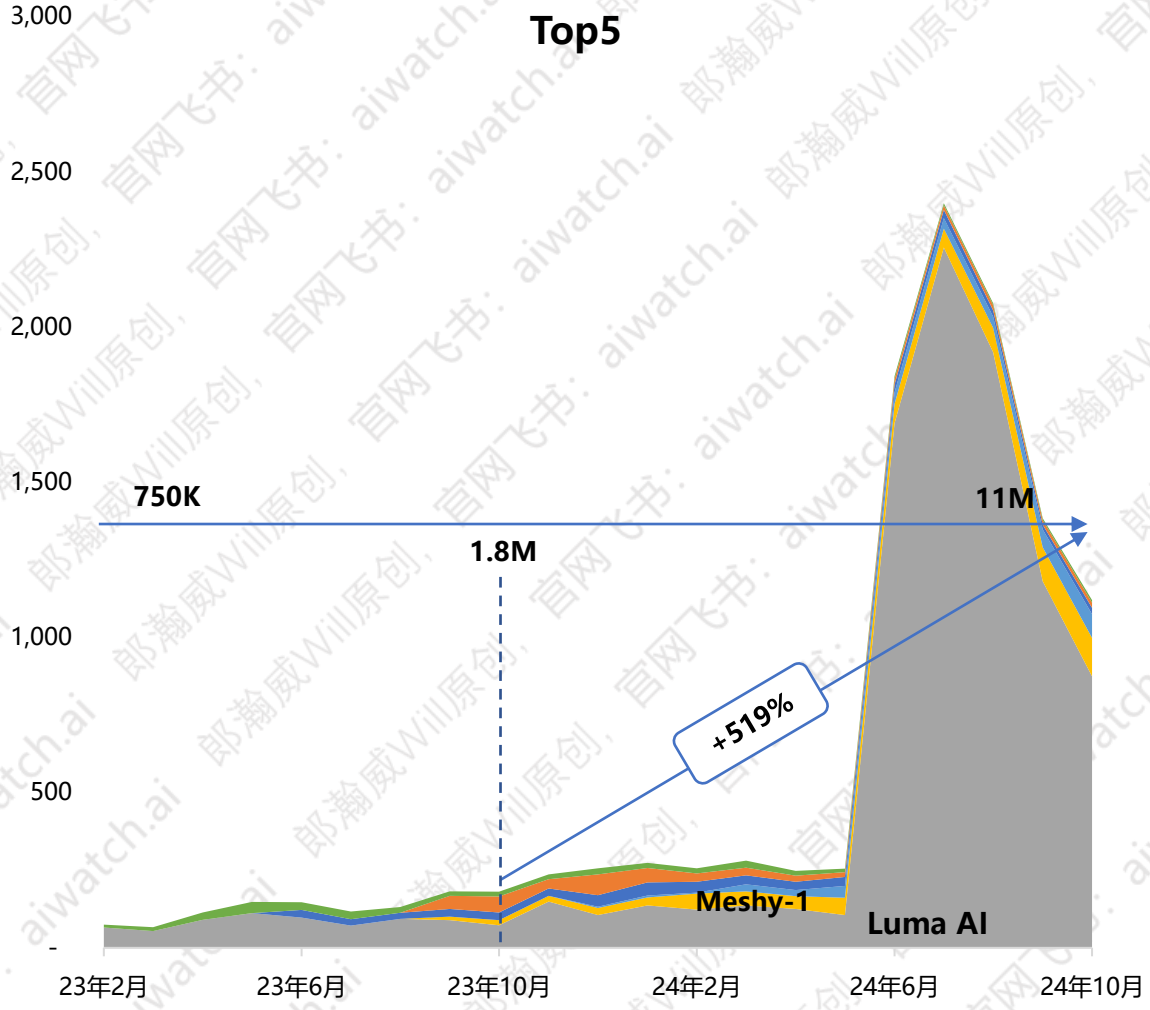
- **TOP15 总融资额：6140万美元** (CSM (Common Sense Machines 2.5M$)+Kaedim (Kaedim 15M$)+Alpha3D (Alpha3D 0.9M$)+Luma (Luma AI 43M$) AI=61.4M$)
- **Top15 总网页流量：1120万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	**Luma AI**	73	875	1099%	Luma AI	B轮	2024/1/9	43	-	United States	13%
2	**Meshy-1**	16	124	675%	Meshy	-	-	-	-	United States	18%
3	**Tripo**	-	76	-	VAST	-	-	-	200	China	21%
4	**Alpha3D**	25	21	-16%	Alpha3D	Convertible Note	2023/9/1	0.9	-	India	14%
5	**CSM**	52	16	-69%	Common Sense Machines	Convertible Note	2023/9/1	2.5	-	United States	12%
6	**Kaedim**	15	8	-47%	Kaedim	A轮	2024/3/11	15	-	United States	20%

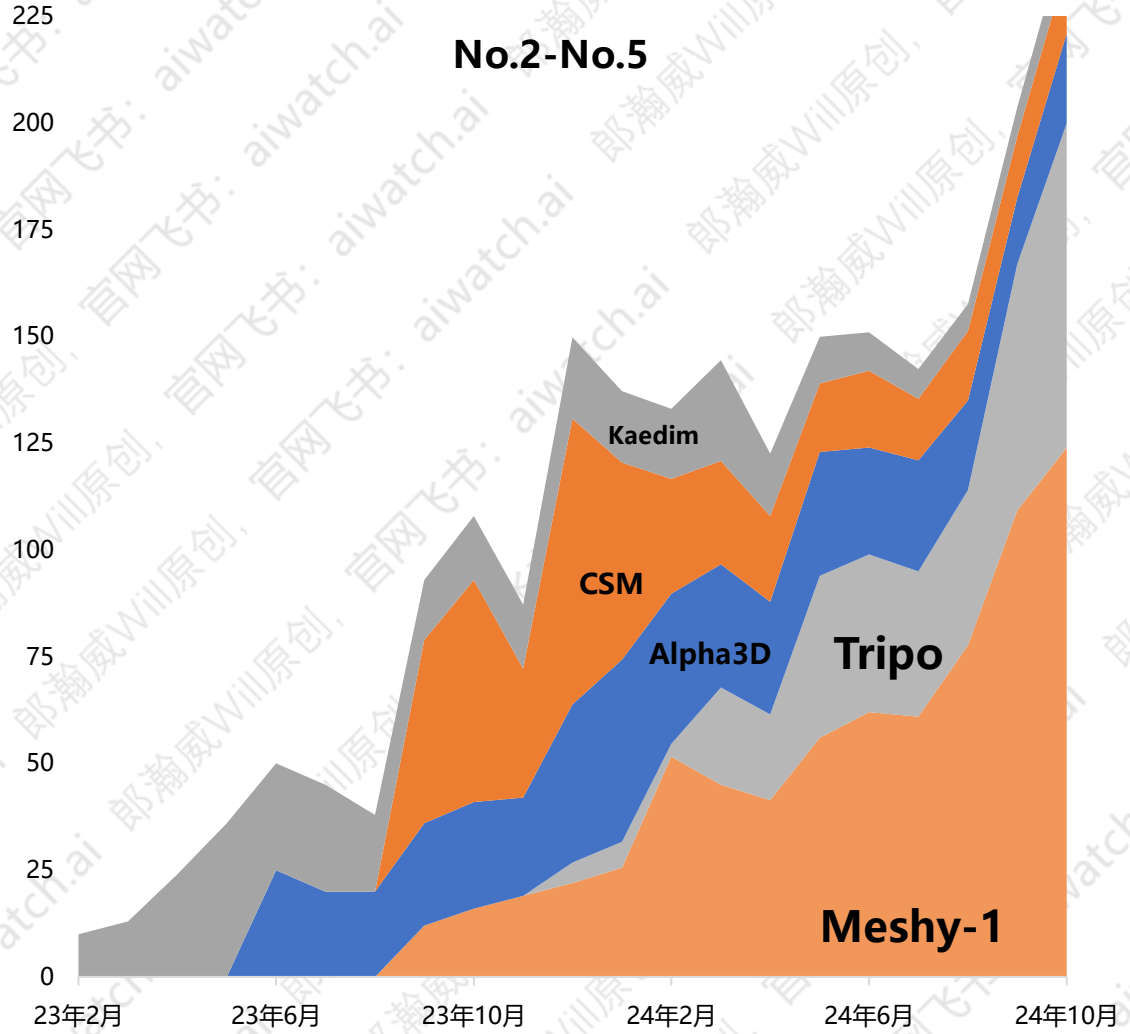
数据来源：similarweb 单位：万visit

3D-模型生成 网页流量趋势 10月总量：1120万

- 市场整体呈现从平稳到爆发的态势，从最初的750K增长到峰值的11M。其中Luma AI在24年6月出现显著增长，带动整体市场规模快速扩张，虽然随后有所回落但仍维持高位。



- 其他玩家的竞争格局相对稳定。Meshy-1和Tripo表现较为突出，尤其是在24年下半年增长明显，而CSM和Kaedim的份额则逐渐被挤压。

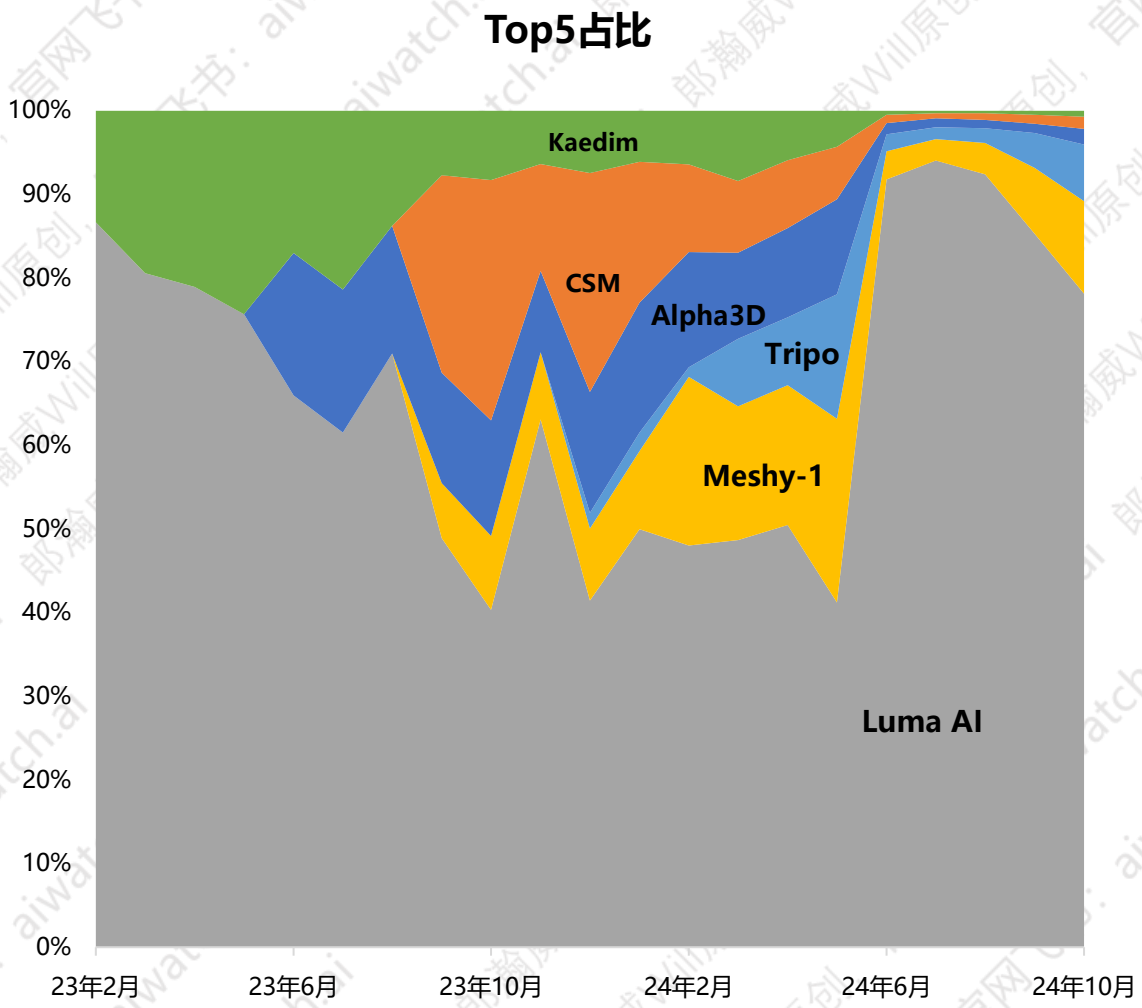


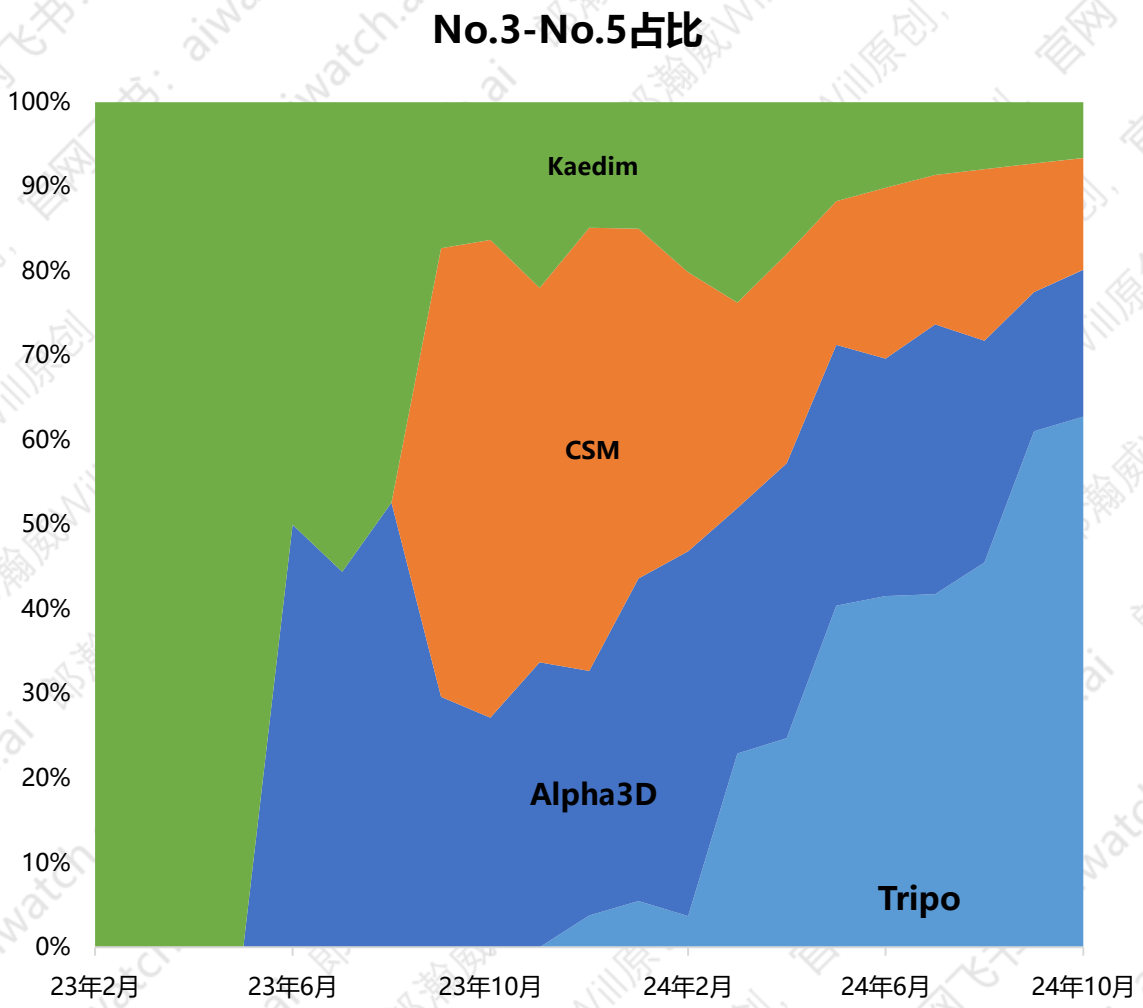
数据来源：similarweb 单位：万visit

3D-模型生成 2023.2~2024.10 网页流量占比

- Luma AI的份额持续扩大，到24年中期已占据绝对主导地位。其他玩家如Meshy-1和Tripo的份额虽有波动，但总体呈现被挤压态势，市场集中度明显提升。

- 在排除前两名后的竞争格局中，市场份额分布更趋均衡。CSM和Tripo的份额此消彼长，显示第二梯队的竞争依然激烈。





数据来源：similarweb 单位：万visit

3D-模型生成 国际 | 国产 | 出海 Top10

国际

- Luma AI 875万访问量断崖领先

序号	产品名称	24年10月(万visit)
1	Luma AI	875
2	Alpha3D	21
3	CSM	16
4	Kaedim	8

国产

- 无数据

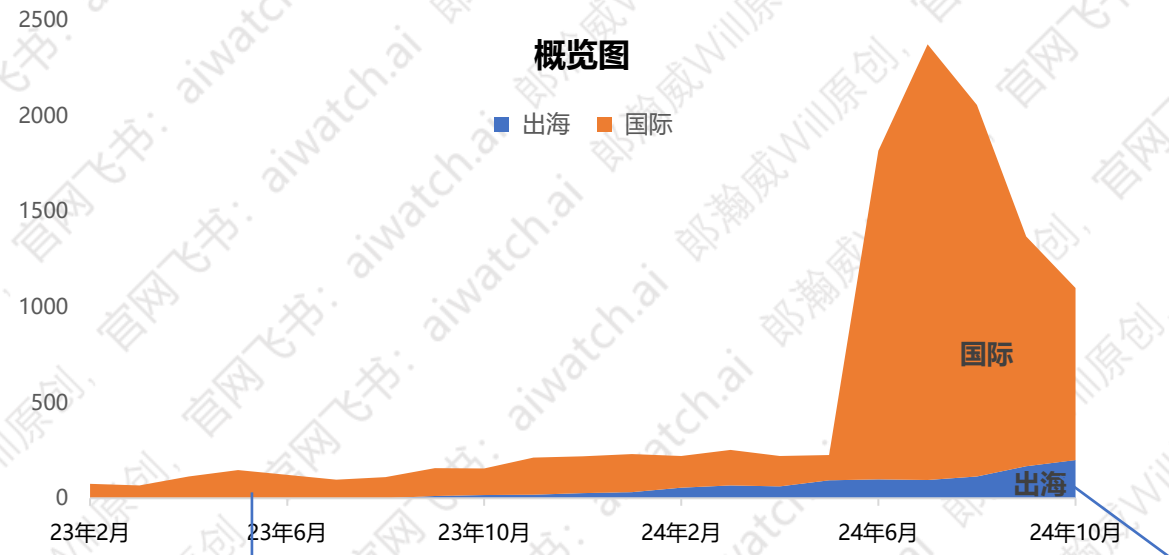
出海

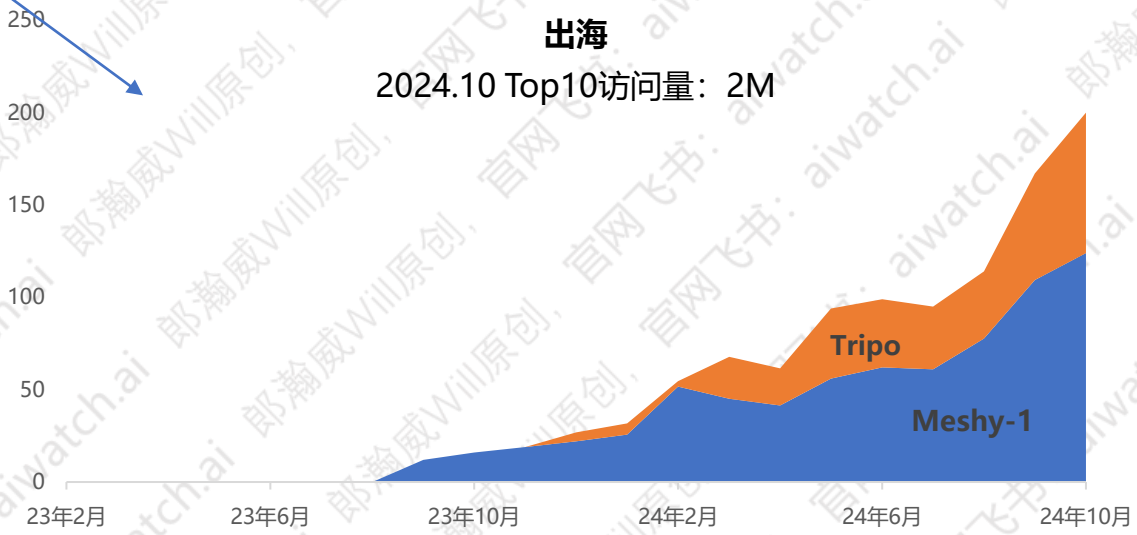
- Meshy-1(124万访问)和Tripo(76万访问)引领市场

序号	产品名称	24年10月(万visit)
1	Meshy-1	124
2	Tripo	76

数据来源：similarweb 单位：万visit

3D-模型生成 国际 78% | 出海 22%

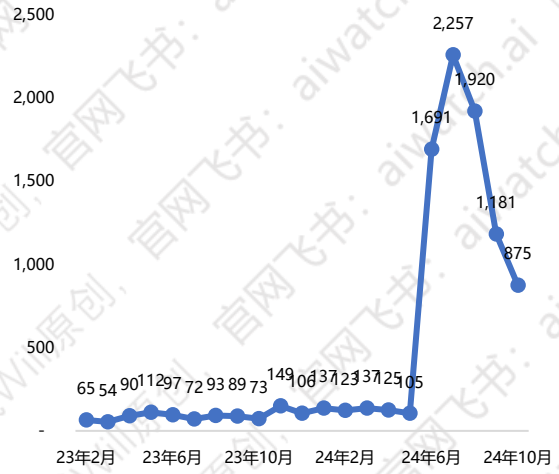




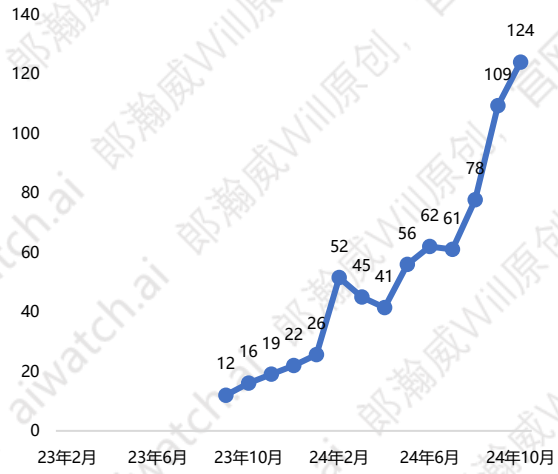
数据来源：similarweb 单位：万visit

3D-模型生成 Top5

1 Luma AI

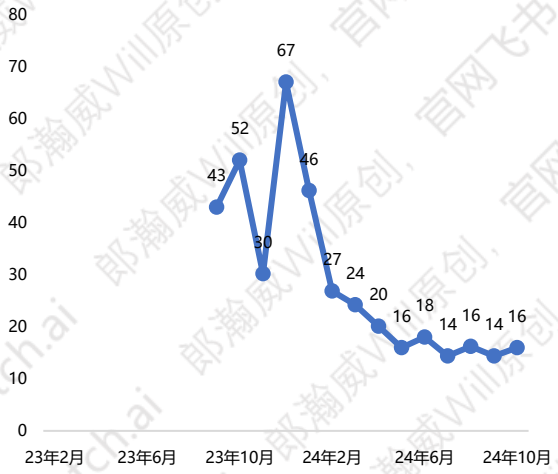


2 Meshy-1

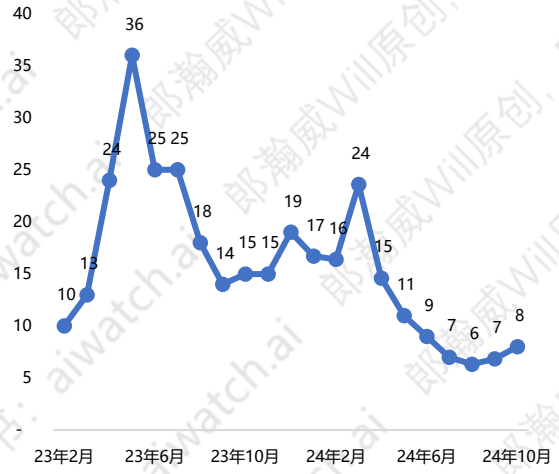


3 Tripo

4 CSM

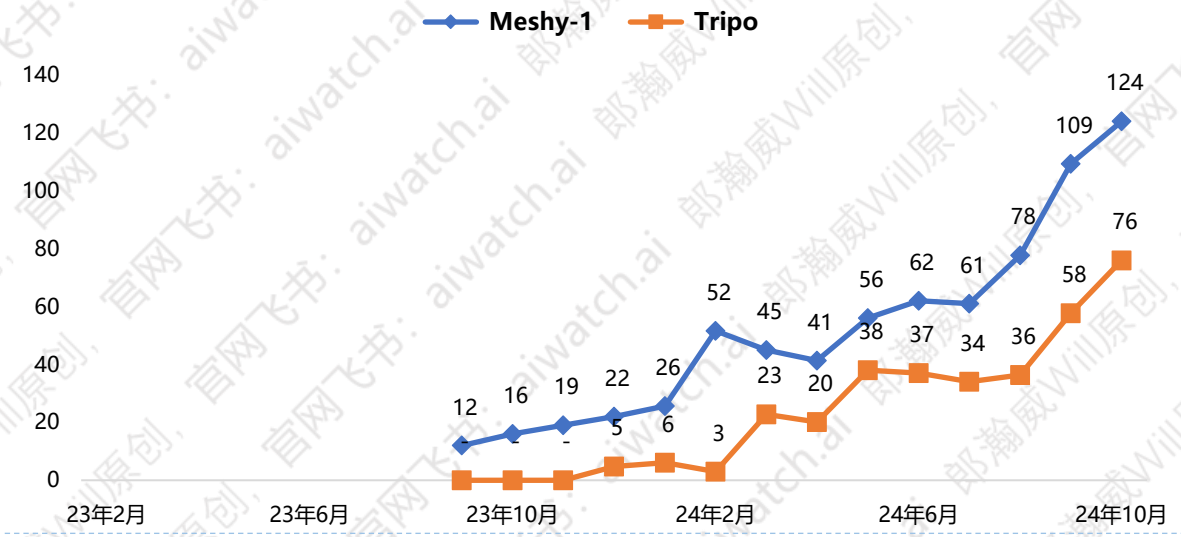


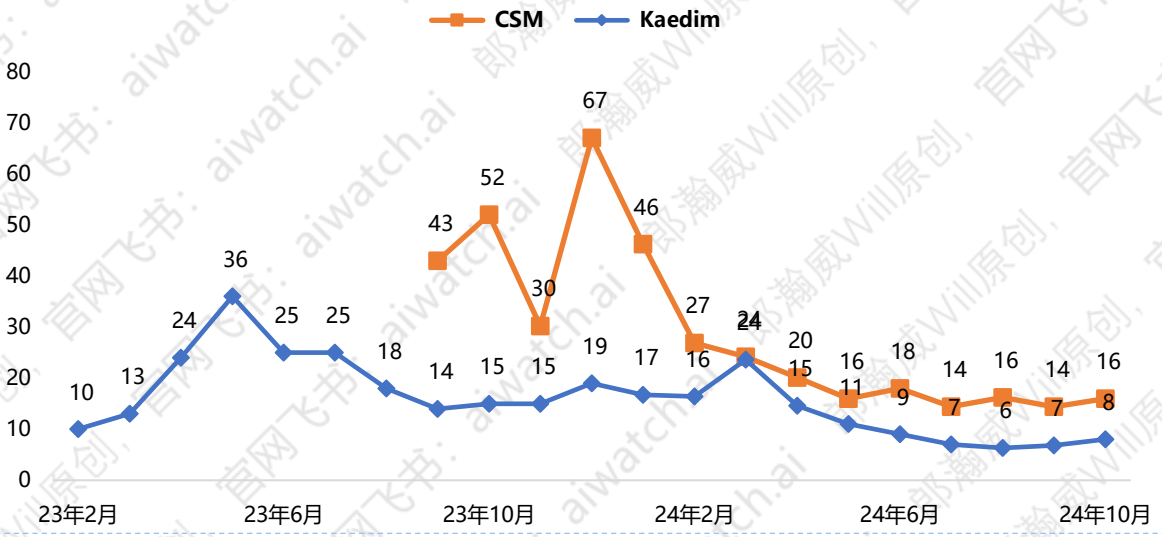
5 Kaedim



数据来源：similarweb 单位：万visit

3D-模型生成 复合图表





数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

AI PPT

AI PPT

AI PPT - Takeaway

1. 2024年10月AI PPT赛道TOP15总访问量达5830万次。
2. 行业第一梯队为Gamma AI、Prezi和Slidesgo，月访问量分别为1799万、1611万和1285万次，形成三足鼎立之势。
3. 从增速看，一批新兴AI产品表现亮眼，如MagicSlides增长363%、SlidesGPT增长261%，显示出AI在PPT制作领域的强大潜力。
4. 近期融资，头部企业Gamma AI和Tome分别完成了1200万美元A轮和4300万美元B轮融资，合计融资总额达5500万美元。
5. 传统PPT工具如Prezi（-33%）和Tome（-81%）访问量出现大幅下滑，而AI驱动的新产品如PresentationsAI（+153%）快速崛起。
6. 细分市场呈现差异化发展趋势，国际市场以AI创新为主，而国产赛道则以Boardmix博思AI白板为代表，更注重场景化应用。

数据来源：similarweb 单位：万visit

AI PPT - Top15

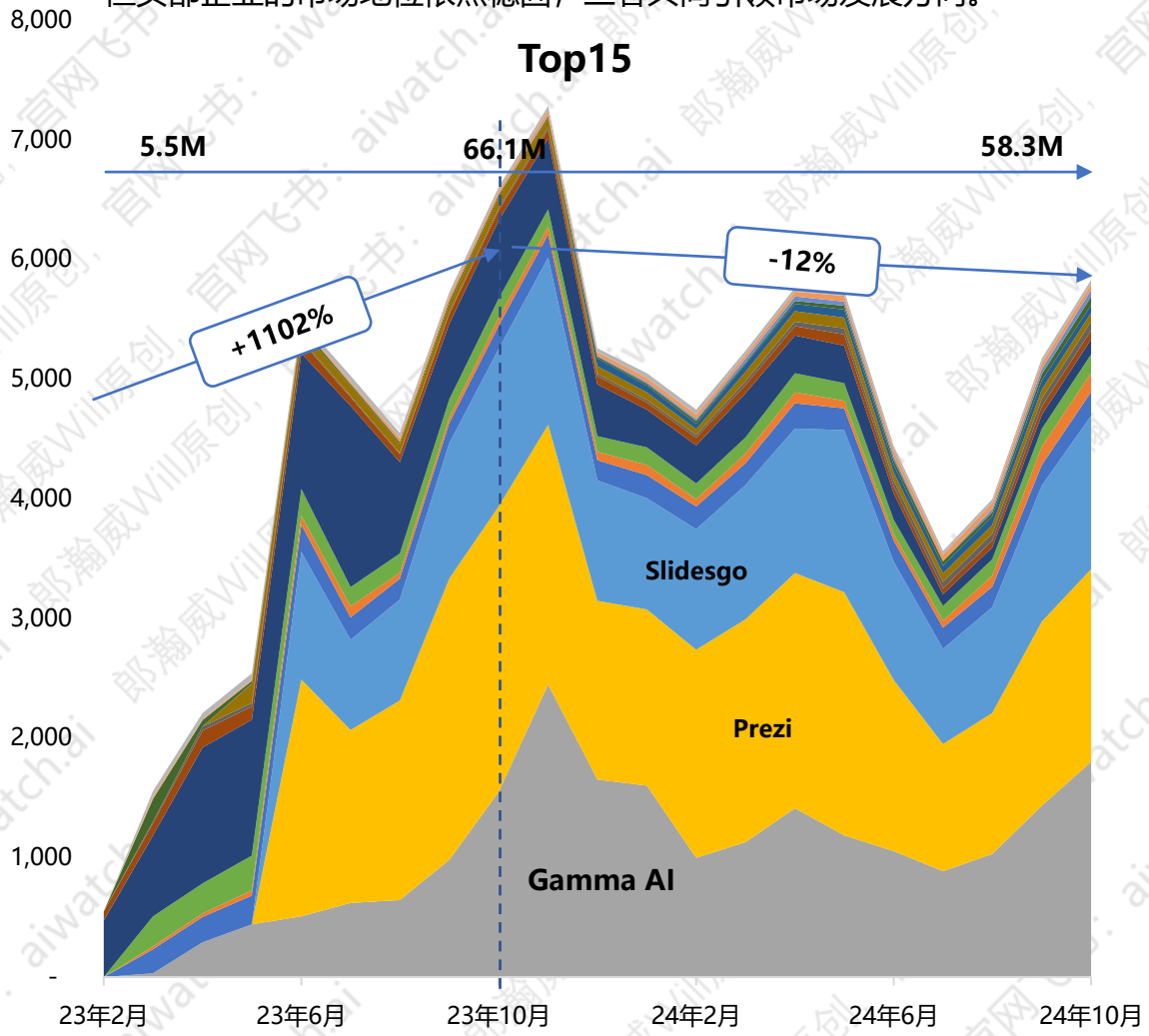
- **TOP15总融资额：5500万美元** (Gamma AI (Gamma AI 12M$)+Tome (Tome 43M$)=55M$)
- **Top15 总网页流量：5830万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Gamma AI	1,547	1,799	16%	Gamma	A轮	2024/5/16	12	-	Brazil	11%
2	Prezi	2,387	1,611	-33%	Prezi	-	-	-	54	Mexico	14%
3	Slidesgo	1,319	1,285	-3%	Freepik	-	-	-	-	United States	19%
4	Pitch	192	196	2%	Pitch	-	-	-	-	United States	21%
5	PresentationsAI	64	162	153%	PresentationsAI	-	-	-	-	India	36%
6	Beautiful.ai	163	155	-5%	Beautiful.ai	-	-	-	-	United States	32%
7	Tome	652	124	-81%	Tome	B轮	2023/2/21	43	-	United States	11%
8	SlidesAI	85	77	-9%	SlidesAI	-	-	-	-	United States	14%
9	MagicSlides	16	74	363%	MagicSlides	-	-	-	-	United States	18%
10	Boardmix 博思AI白板	95	72	-24%	博思云创	-	-	-	-	China	83%
11	ClassPoint AI	1	68	6700%	ClassPoint AI	-	-	-	-	United States	16%
12	SlidesGPT	18	65	261%	SlidesGPT	-	-	-	-	United States	17%
13	SlideSpeak		56	-	SlideSpeak	-	-	-	-	India	21%
14	Plusdocs	31	50	61%	Plusdocs	-	-	-	-	United States	25%
15	Slidebean	35	37	6%	Slidebean	-	-	-	-	United States	20%

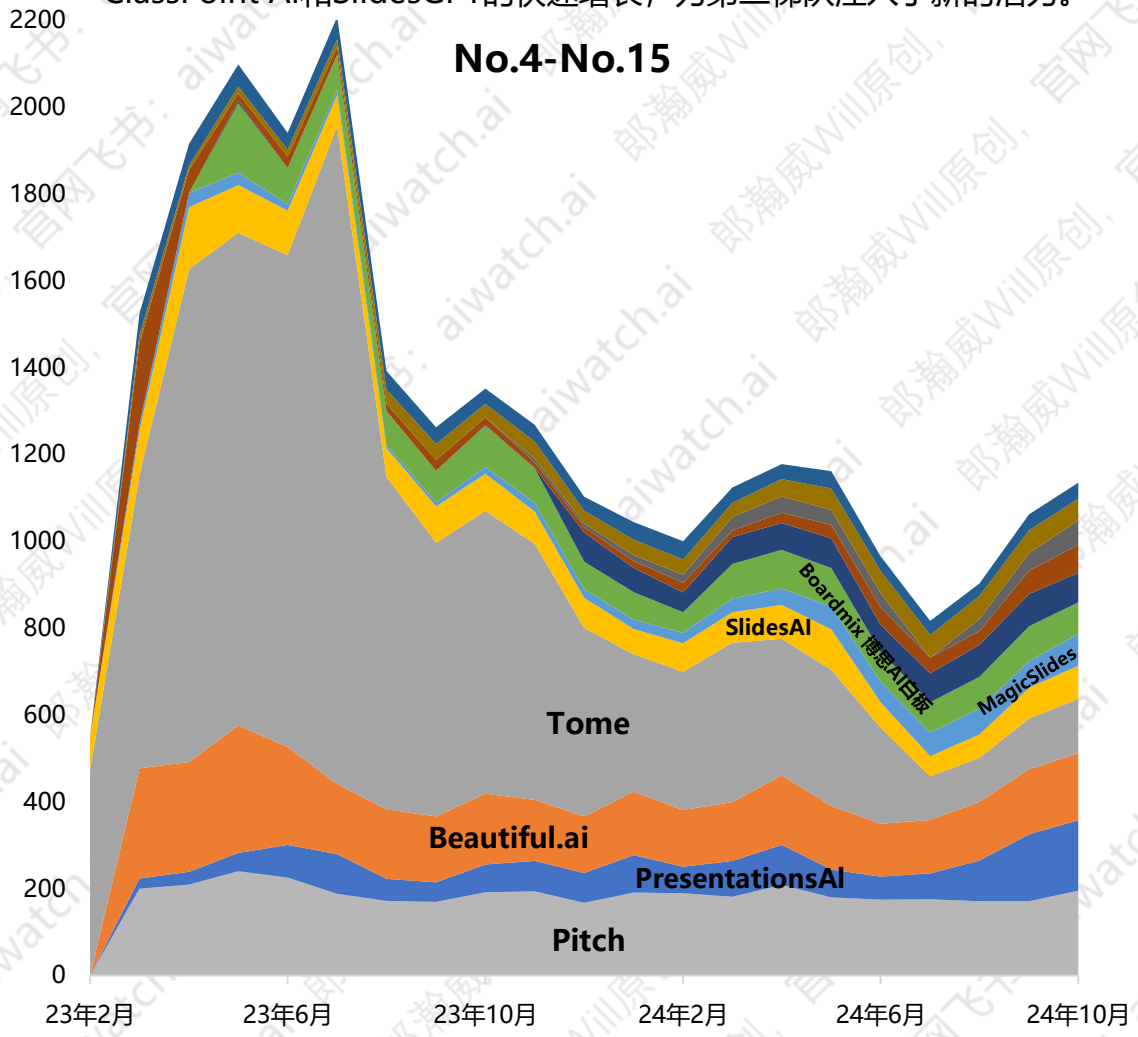
数据来源：similarweb 单位：万visit

AI PPT 网页流量趋势 10月总量：5830万

- 从流量趋势来看，Gamma AI、Prezi和Slidesgo稳居前三，月访问量均超过1000万。虽然总体流量从23年10月的66.1M下降至58.3M，但头部企业的市场地位依然稳固，三者共同引领市场发展方向。



- 在第4-15名的竞争中，Pitch和PresentationsAI表现较为稳定，Beautiful.ai和Tome则经历了较大幅度的份额调整。新进入者如ClassPoint AI和SlidesGPT的快速增长，为第二梯队注入了新的活力。

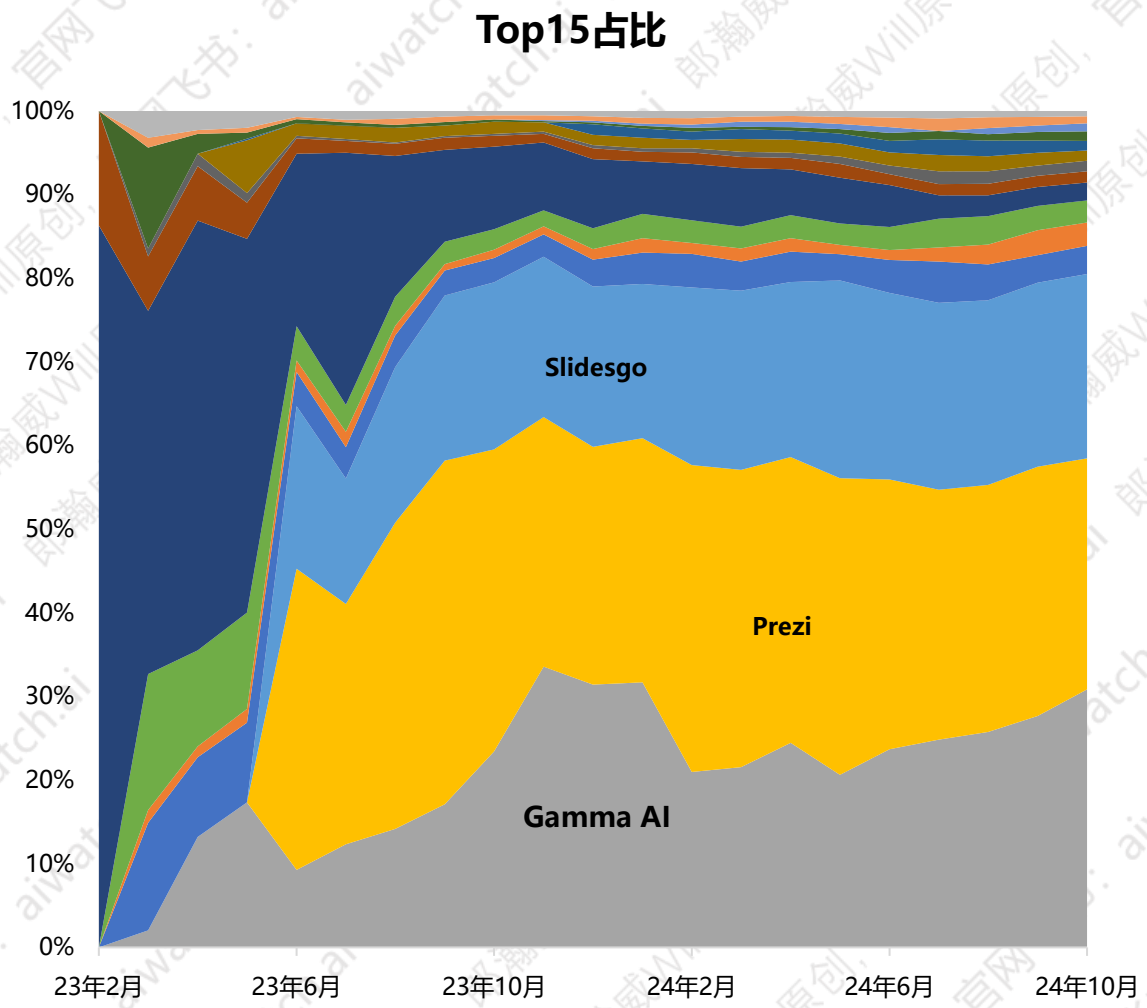


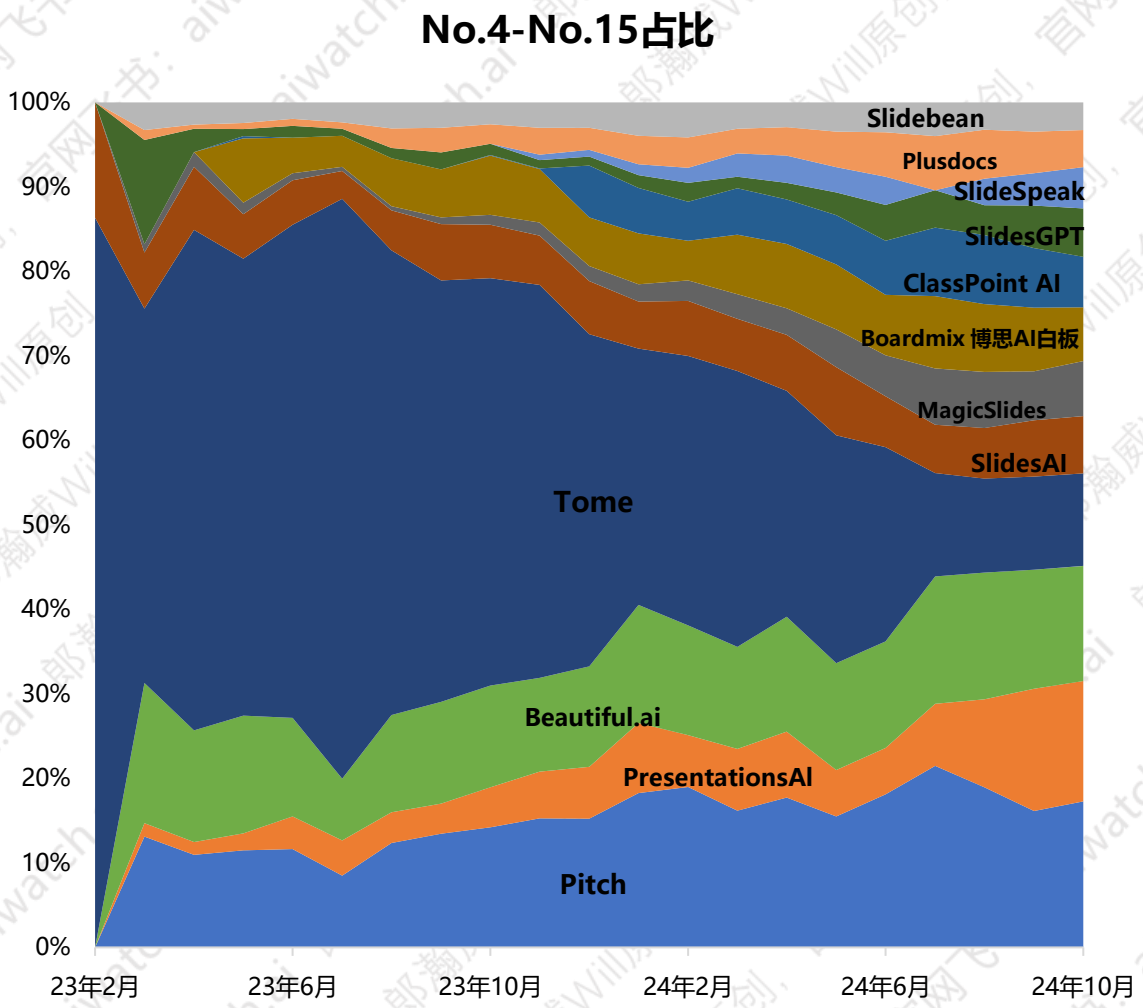
数据来源：similarweb 单位：万visit

AI PPT 2023.2~2024.10 网页流量占比

- Top15占比分析：Gamma AI的市场主导地位不断加强，但Prezi和Slidesgo的份额相对稳定，形成了良性竞争格局。头部企业的整体份额趋于稳定，市场结构逐渐成熟。

- 4-15名占比分析：Pitch和Beautiful.ai在第二梯队中保持相对稳定的市场份额，而PresentationsAI等新兴力量的崛起，使得第二梯队的竞争更加多元化。





数据来源：similarweb 单位：万visit

AI PPT 国际 | 国产 | 出海 Top10

国际

- Gamma AI(1799万访问)领跑，欧美产品占据主要份额

序号	产品名称	24年10月(万visit)
1	Gamma AI	1,799
2	Prezi	1,611
3	Slidesgo	1,285
4	Pitch	196
5	PresentationsAI	162
6	Beautiful.ai	155
7	Tome	124
8	SlidesAI	77
9	MagicSlides	74
10	ClassPoint AI	68

国产

- Boardmix领先(72万访问)，但整体规模偏小

序号	产品名称	24年10月(万visit)
1	Boardmix 博思AI白板	72
2	iSlide	31
3	AiPPT	30
4	讯飞智文	25
5	Mindshow	11
6	ChatPPT	7
7	笔格PPT	6
8	轻竹办公	4
9	爱设计PPT	4
10	GaiPPT	1

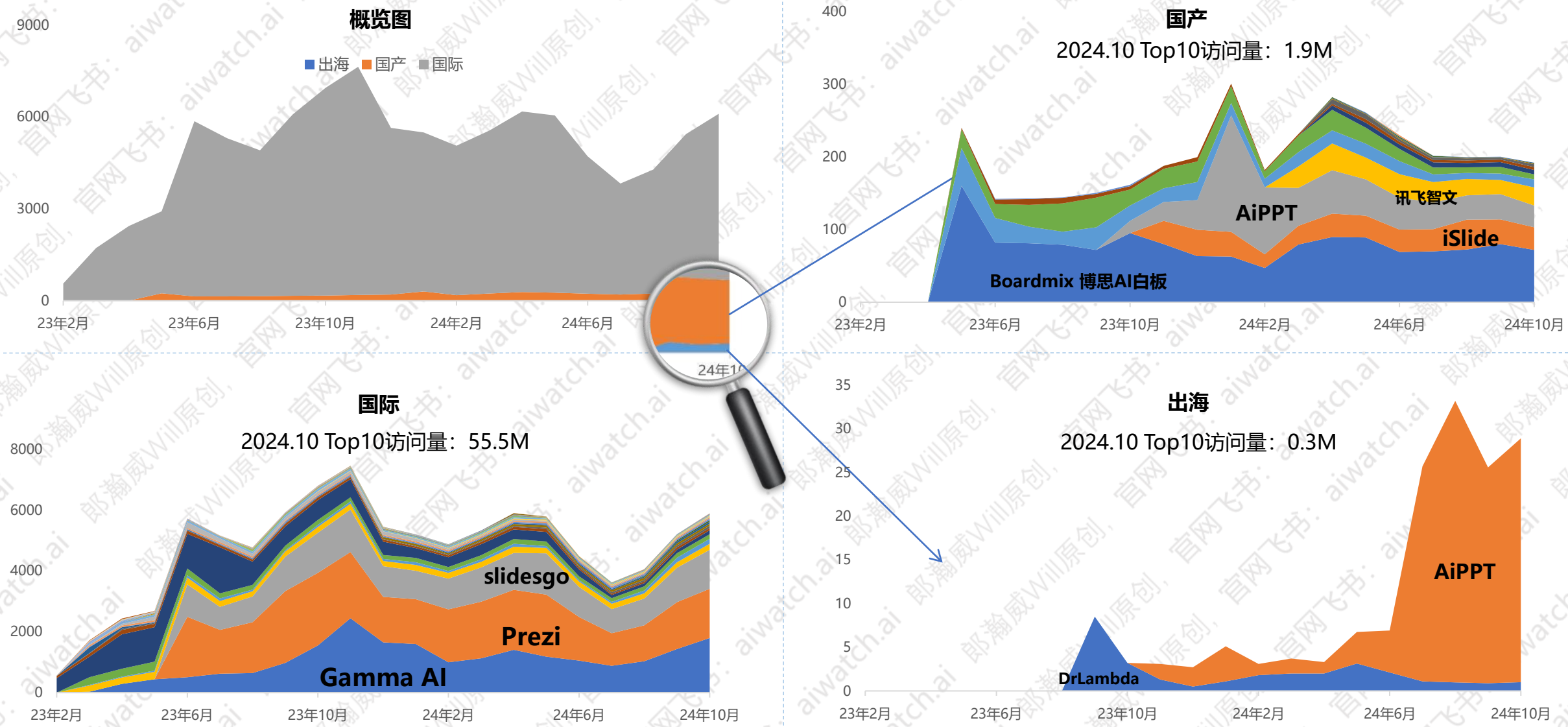
出海

- 规模较小，AiPPT(28万访问)领跑

序号	产品名称	24年10月(万visit)
1	AiPPT	28
2	DrLambda	1

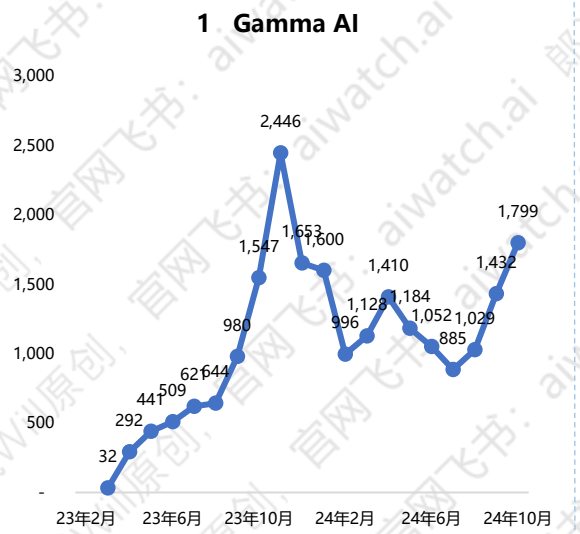
数据来源：similarweb 单位：万visit

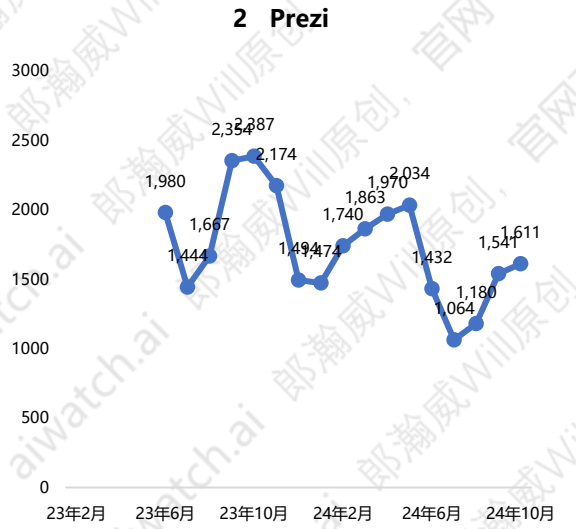
AI PPT 国际 96% | 国产 3.8% | 出海 0.2%

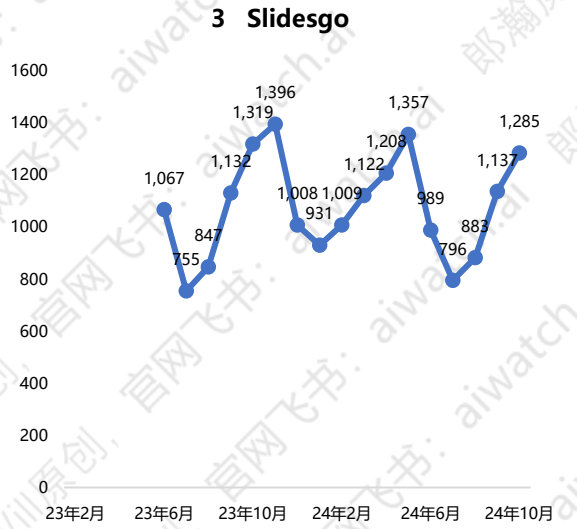


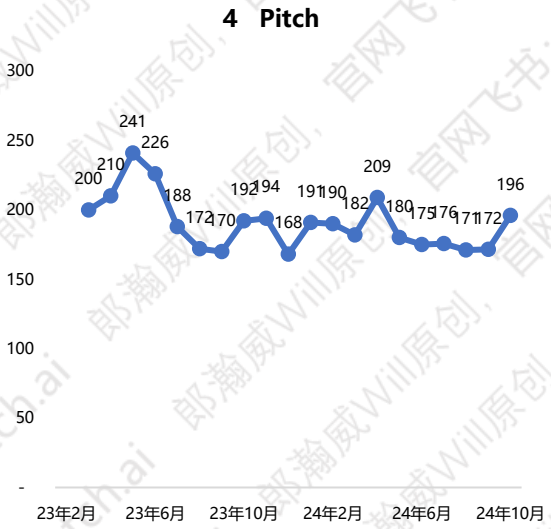
数据来源：similarweb 单位：万visit

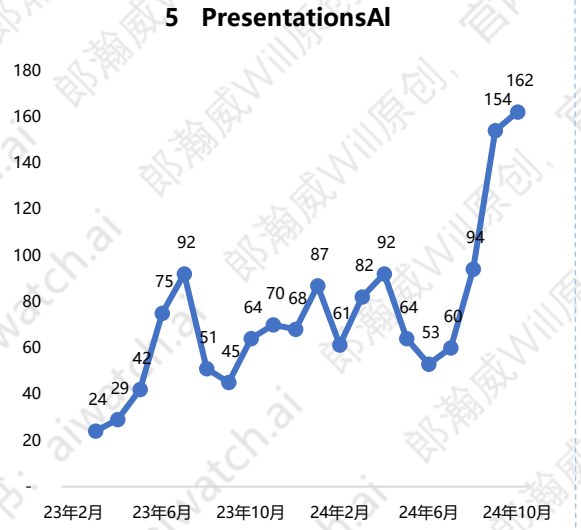
AI PPT No.1-No.8

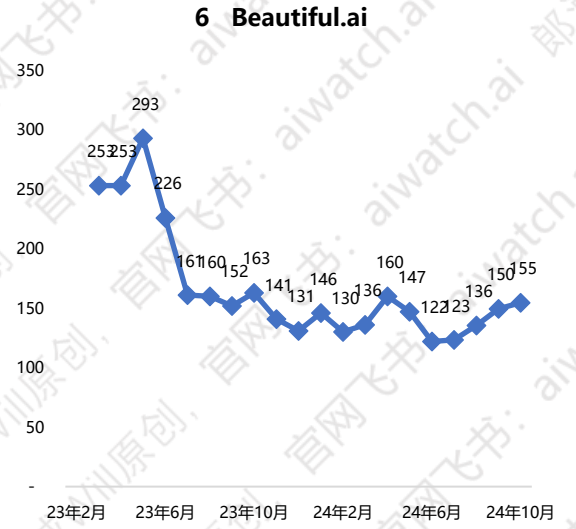


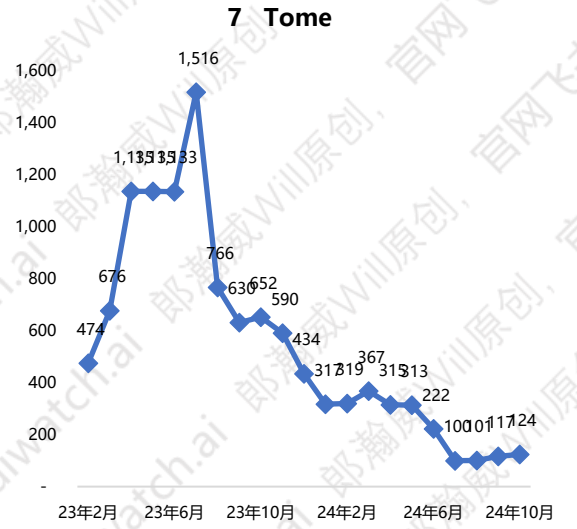


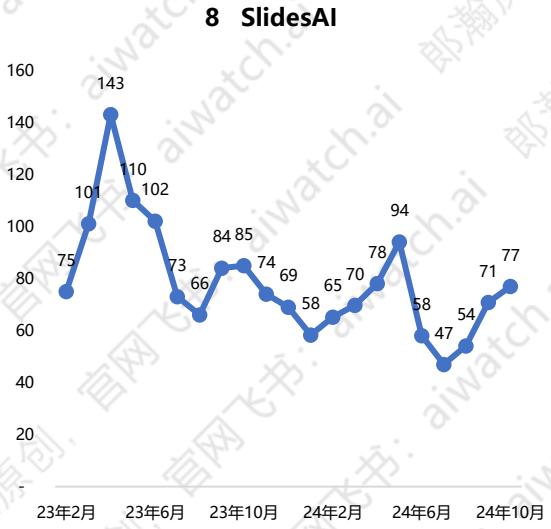












数据来源：similarweb 单位：万visit

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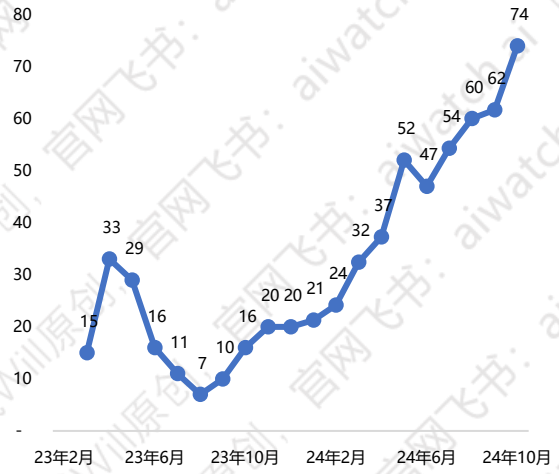
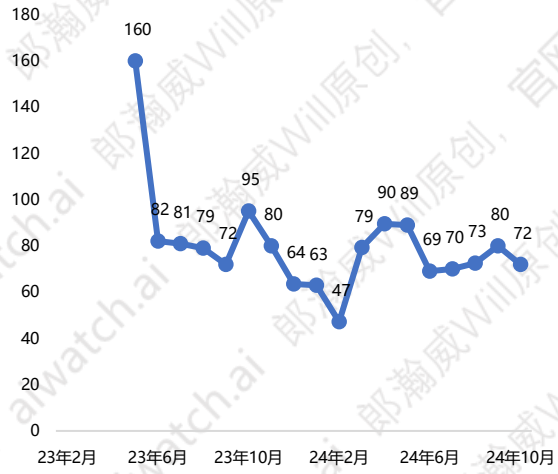
AI PPT No.9-No.16

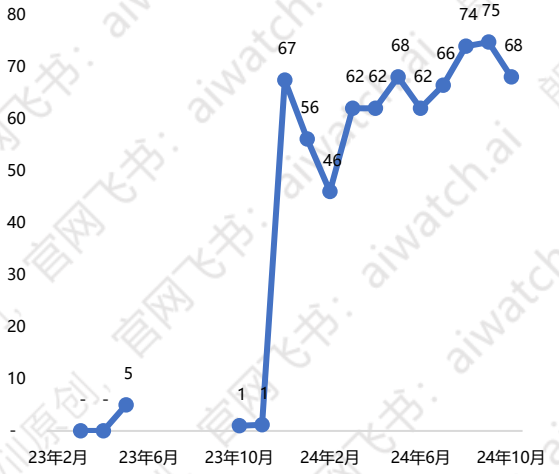
9 MagicSlides



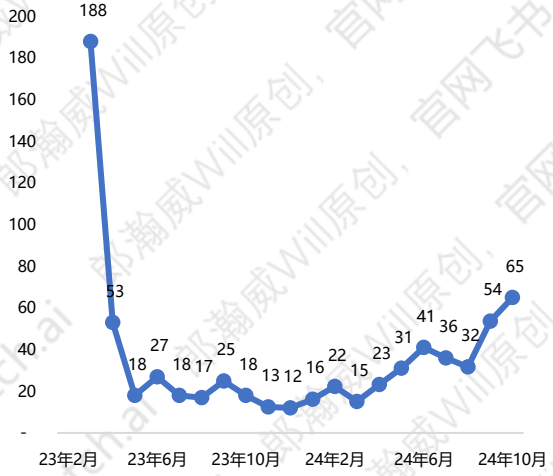
10 Boardmix 博思AI白板



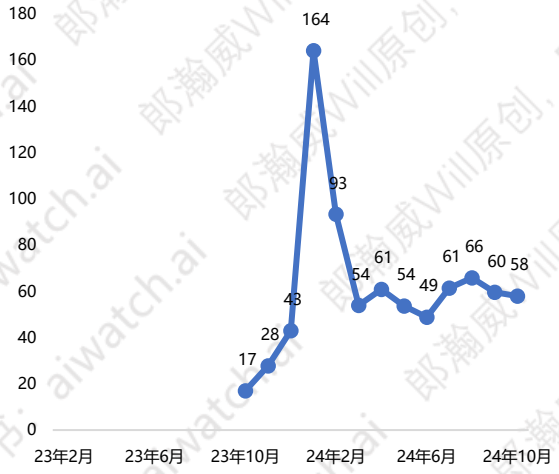
11 ClassPoint AI



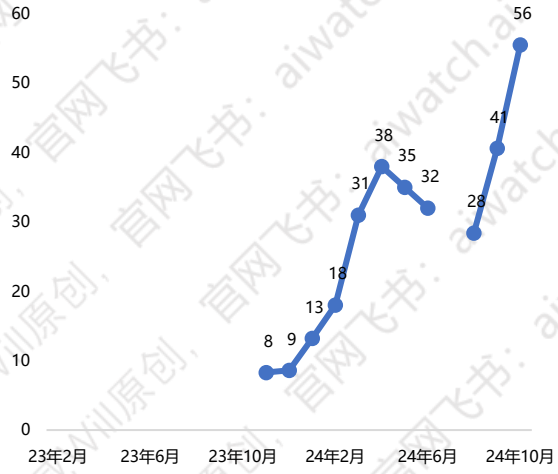
12 SlidesGPT



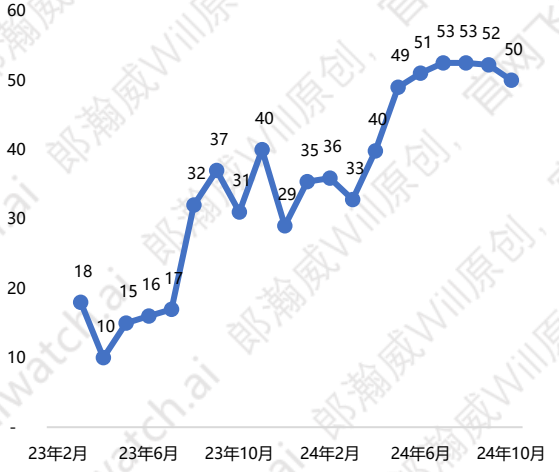
13 AiPPT



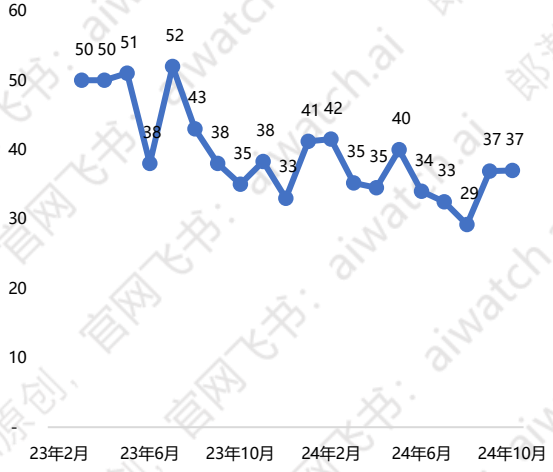
14 SlideSpeak



15 Plusdocs

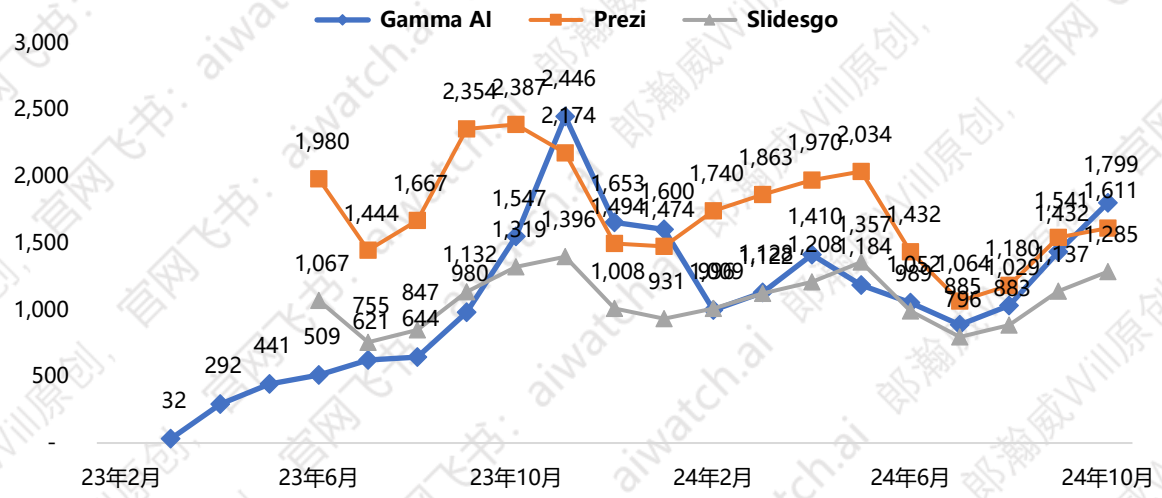


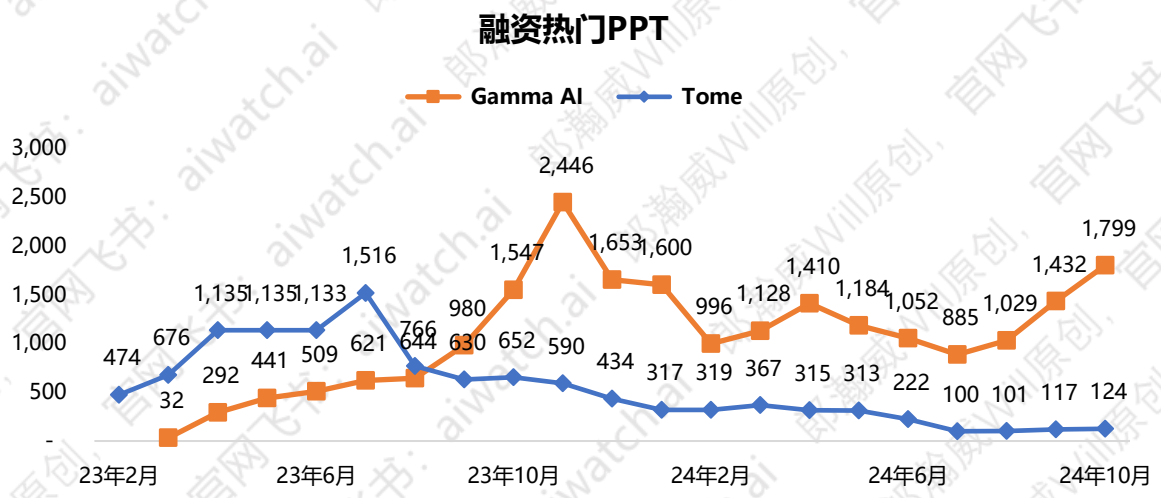
16 Slidebean

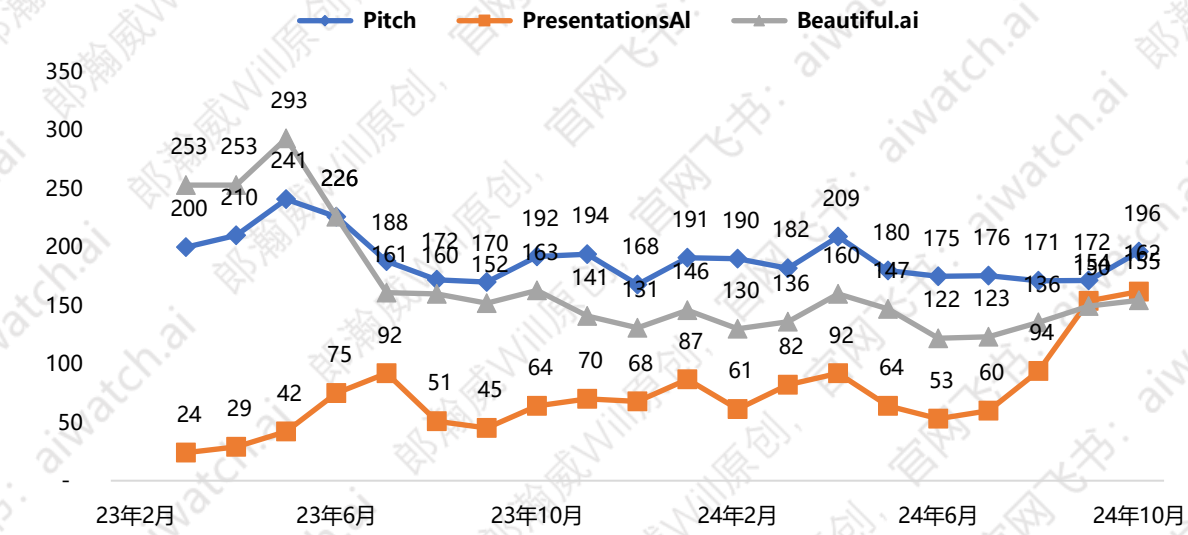


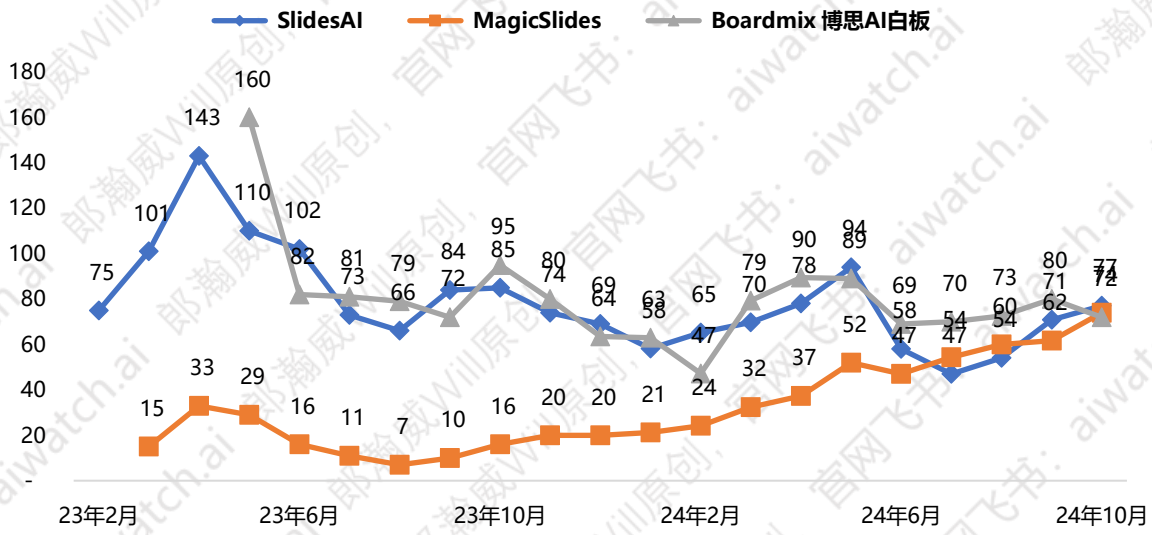
数据来源：similarweb 单位：万visit

AI PPT 复合图表









数据来源：similarweb 单位：万visit

数字人

数字人

数字人 – Takeaway

1. 2024年10月数字人赛道TOP15总访问量为2082万次访问，整体市场仍处于发展初期。
2. Vidnoz AI、Heygen和Synthesia位居前三，访问量分别为874万、353万和227万次，其中Vidnoz AI实现显著增长。
3. 增长方面，Vidnoz AI和Virbo表现最为亮眼，同比增长分别达687%和876%，而传统头部玩家如Heygen、D-ID则出现大幅下滑。
4. 融资方面，Heygen获得A轮6000万美元，Synthesia获得C轮9000万美元，Colossyan获得A轮2200万美元。
5. 从市场占比来看，美国、印度、巴西等国际玩家占据主要市场份额，而中国的腾讯智影、NoEdgeAI等产品也开始发力。
6. 数字人赛道正在从早期的营销展示向多元化应用场景延伸，如企业培训、在线教育、客服等领域，应用场景不断拓展。
7. 从产品形态看，各家企业开始强调差异化定位，如Akool专注印度本土市场，Virbo针对短视频创作，显示出更明确的垂直领域布局趋势。

数据来源：similarweb 单位：万visit

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数字人 - Top15

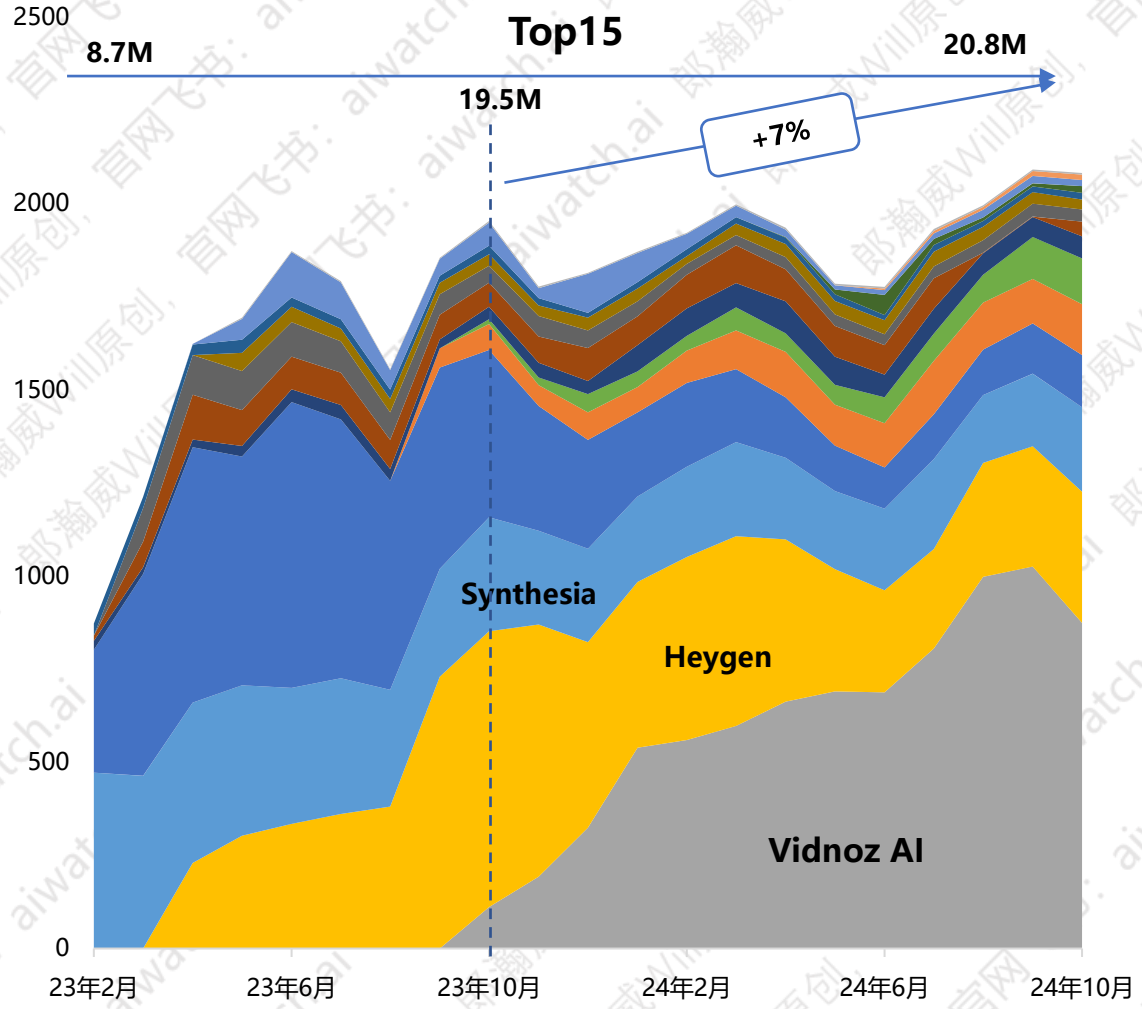
- **TOP15总融资额：1.72亿美元** (Heygen (诗云科技 60M$)+Synthesia (Synthesia 90M$)+Colossyan (Colossyan 22M$)=172M$)
- **Top15 总网页流量：2082万次visit**

序号	产品名称	23年10月(万visit)	24年10月(万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Vidnoz AI	111	874	687%	Vidnoz AI	-	-	-	-	Brazil	13%
2	Heygen	741	353	-52%	诗云科技	A轮	2024/6/20	60	35	United States	13%
3	Synthesia	306	227	-26%	Synthesia	C轮	2023/6/13	90	63	United States	18%
4	D-ID	449	140	-69%	D-ID	-	-	-	-	United States	9%
5	Akool	70	136	95%	Akool	-	-	-	40	India	16%
6	Virbo（万兴播爆）	13	123	876%	万兴科技	-	-	-	-	India	18%
7	Artflow ai	34	59	74%	Artflow	-	-	-	-	United States	13%
8	AI Studios	64	40	-38%	AI Studios	-	-	-	-	India	12%
9	Elai io	46	33	-28%	Elai io	-	-	-	-	United States	15%
10	腾讯智影	31	27	-14%	腾讯	-	-	-	-	China	94%
11	NoEdgeAI		18	-	智识无垠	-	-	-	-	China	86%
12	Colossyan	23	18	-22%	Colossyan	A轮	2024/2/6	22	-	United States	22%
13	Kreado_AI	62	16	-74%	易点天下	-	-	-	-	Brazil	12%
14	VidAU		15	-	线条科技	-	-	-	-	Pakistan	13%
15	硅基智能	4	4	0%	硅基智能	-	-	-	-	China	56%

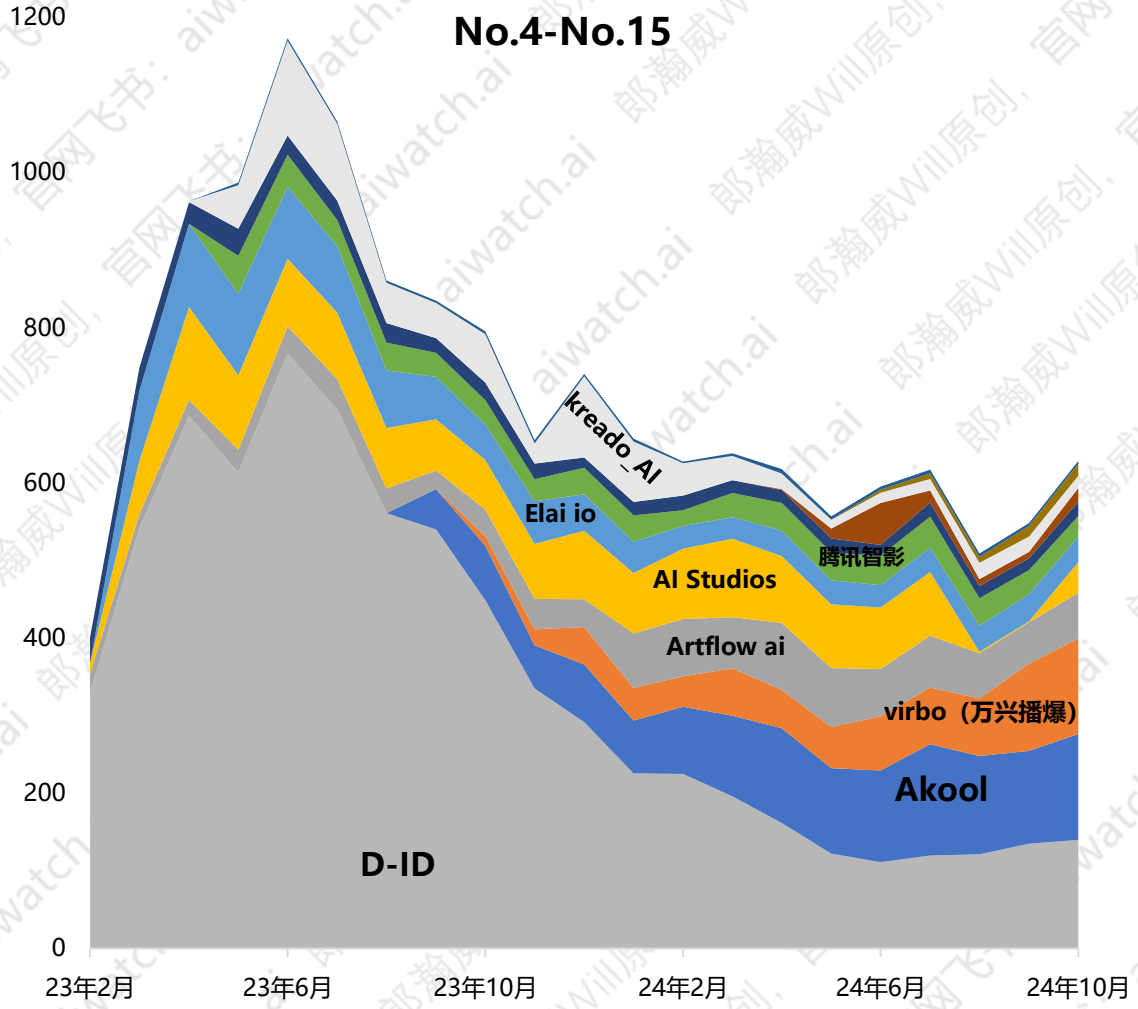
数据来源：similarweb 单位：万visit

数字人 网页流量趋势 10月总量：2082万

- Vidnoz AI呈现出强劲的上升趋势，增长曲线陡峭。Heygen和Synthesia虽然占据第二、三位置，但增长曲线趋于平缓，甚至出现下滑态势。



- D-ID作为第二梯队代表，访问量曲线呈现明显下降趋势。相比之下，Akool和Virbo的增长曲线则展现出良好的上升态势，显示出后起之秀的潜力。

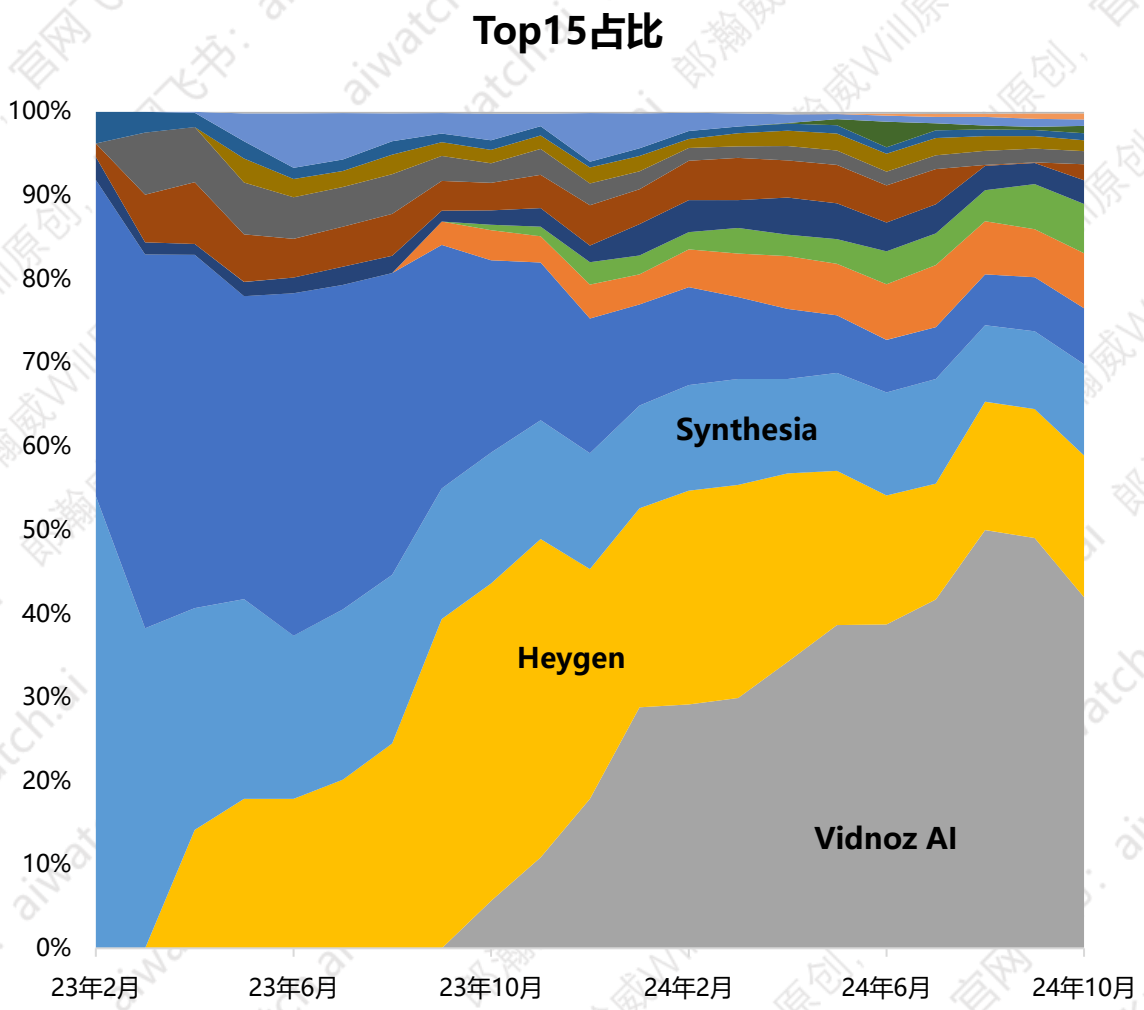


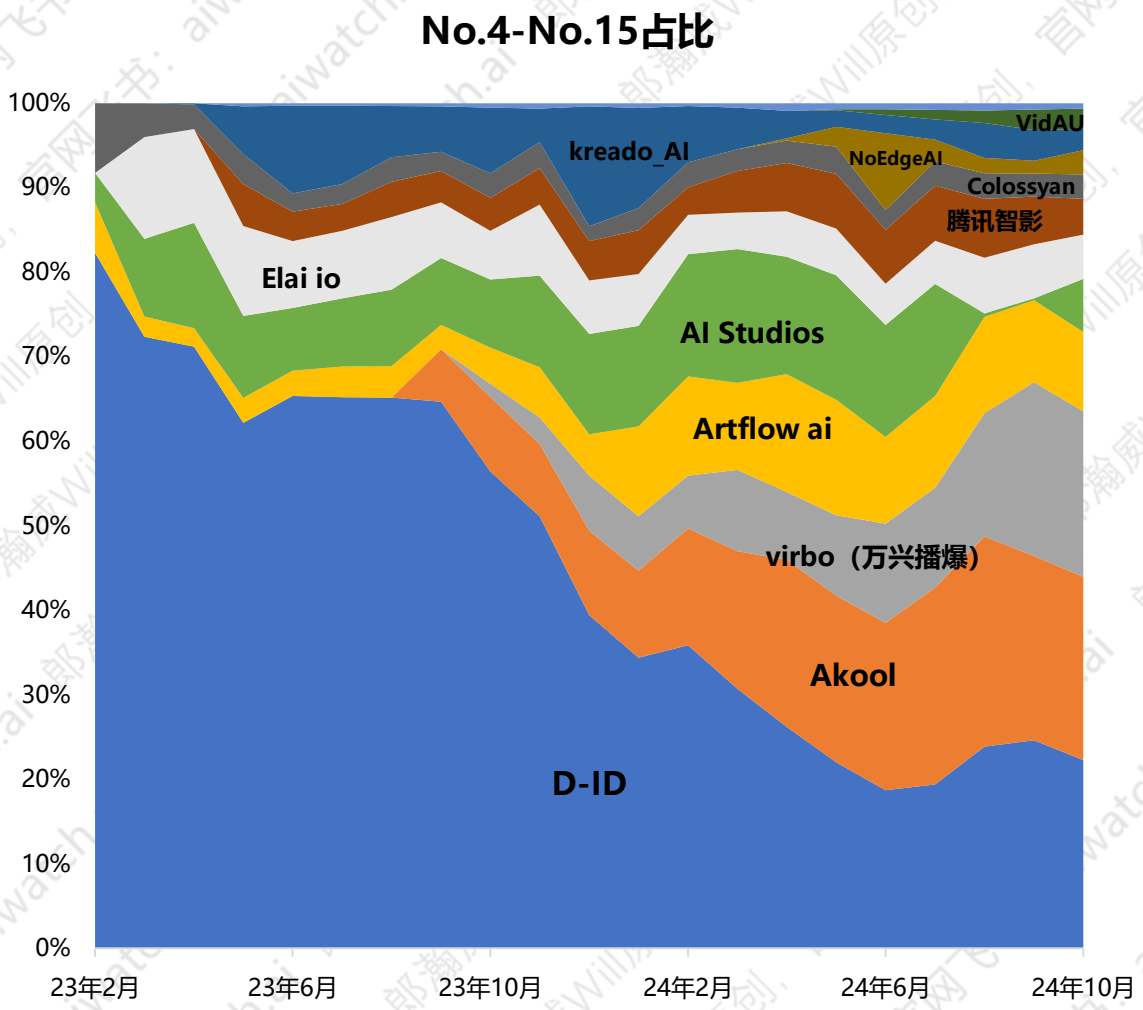
数据来源：similarweb 单位：万visit

数字人 2023.2~2024.10 网页流量占比

- 从Top15占比图看，Vidnoz AI的市场份额持续攀升，从最初不到10%上升至如今的40%以上。而Heygen和Synthesia的份额则呈现下降趋势，两者合计份额从高峰期的40%降至现在的25%左右。

- 在No.4-No.15梯队中，D-ID的份额中期开始明显下滑，但仍保持20%以上。Akool和Virbo表现抢眼，份额稳步提升至15%左右，而AI Studios和Artflow ai的份额则相对稳定。





数据来源：similarweb 单位：万visit

数字人 国际 | 国产 | 出海 Top10

国际

- Vidnoz AI一家独大，访问量达874万次，领先优势明显。

序号	产品名称	24年10月(万visit)
1	Vidnoz AI	874
2	Synthesia	227
3	D-ID	140
4	AI Studios	40
5	Elai io	33
6	Colossyan	18
7	Metaphysic	3
8	Rephrase	2
9	Future AI	1
10	Vlogger	1

国产

- 腾讯智影位居榜首，访问量27万次，本土化优势突出。

序号	产品名称	24年10月(万visit)
1	腾讯智影	27
2	NoEdgeAI	18
3	硅基智能	4
4	蝉镜	3
5	AvatarX	1
6	有言	1
7	灵境赛博	-
8	D-Human	-
9	空间直觉（Microfeel）	-
10	ALLTIME 万物时	-

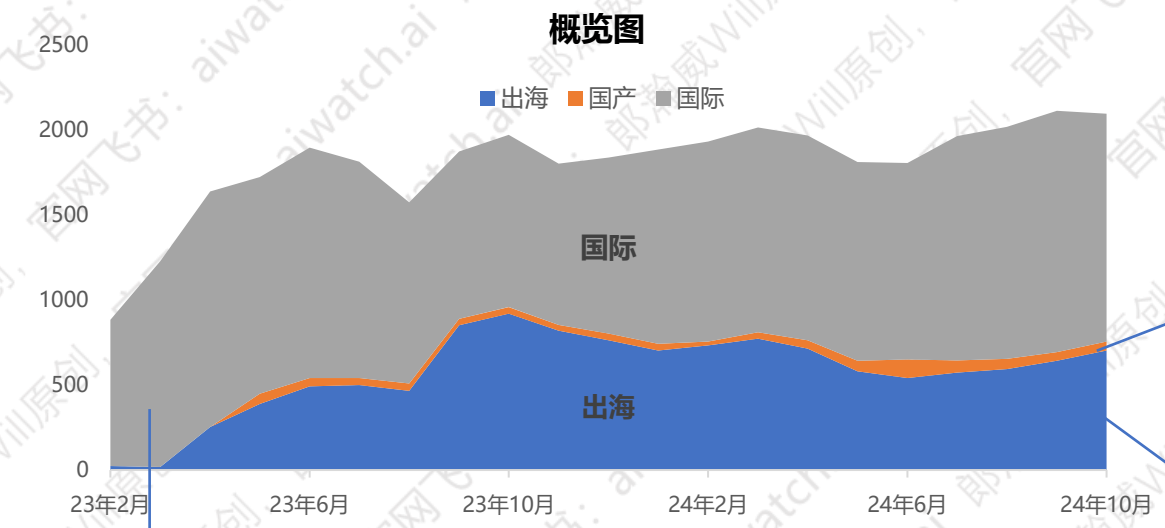
出海

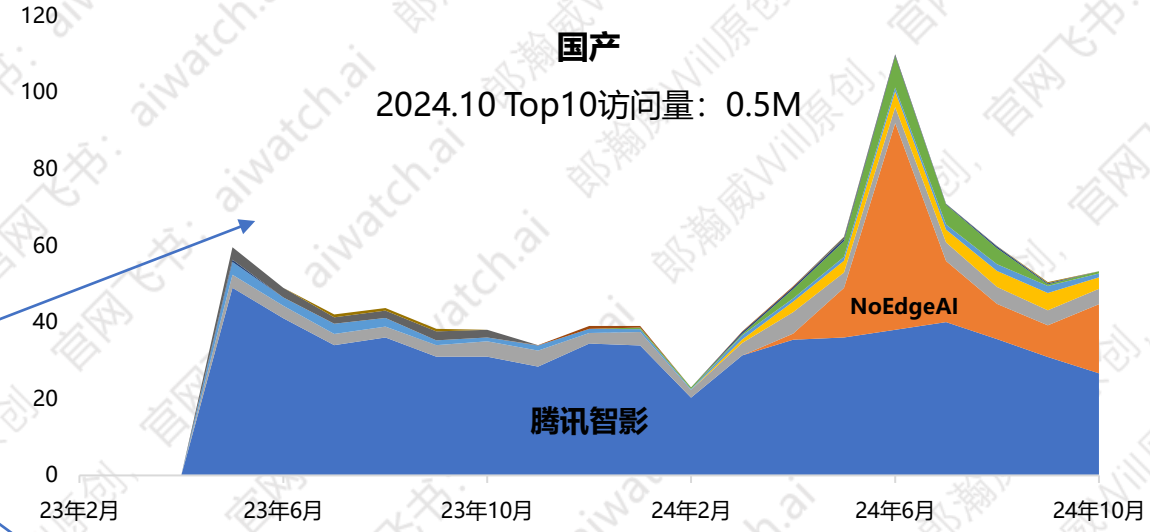
- Heygen领跑，访问量353万次，但增长面临挑战。

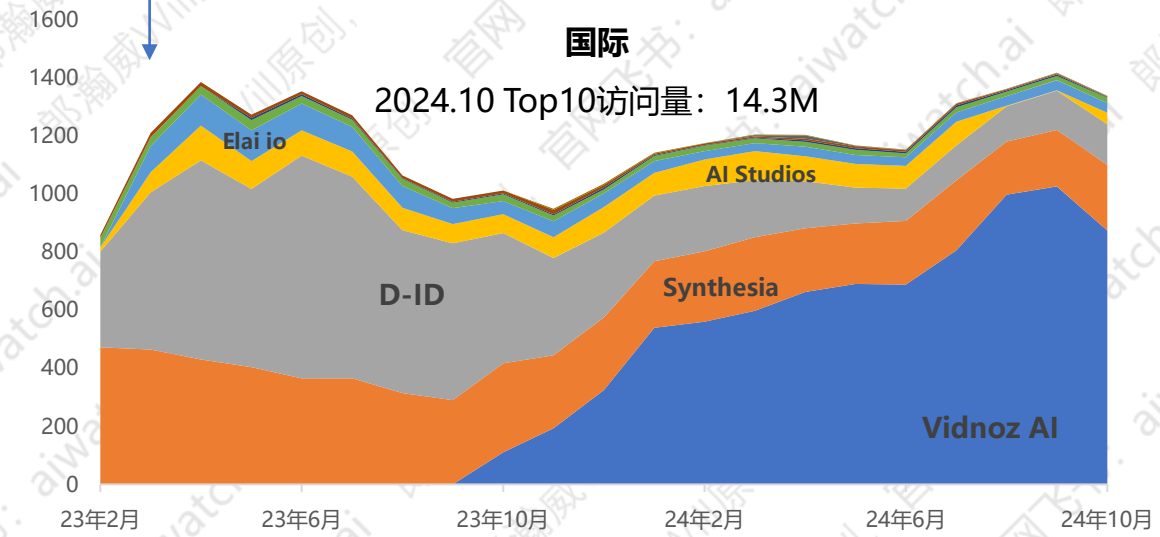
序号	产品名称	24年10月(万visit)
1	Heygen	353
2	Akool	136
3	virbo（万兴播爆）	123
4	Artflow ai	59
5	kreado_AI	16
6	VidAU	15
7	Taikie	-

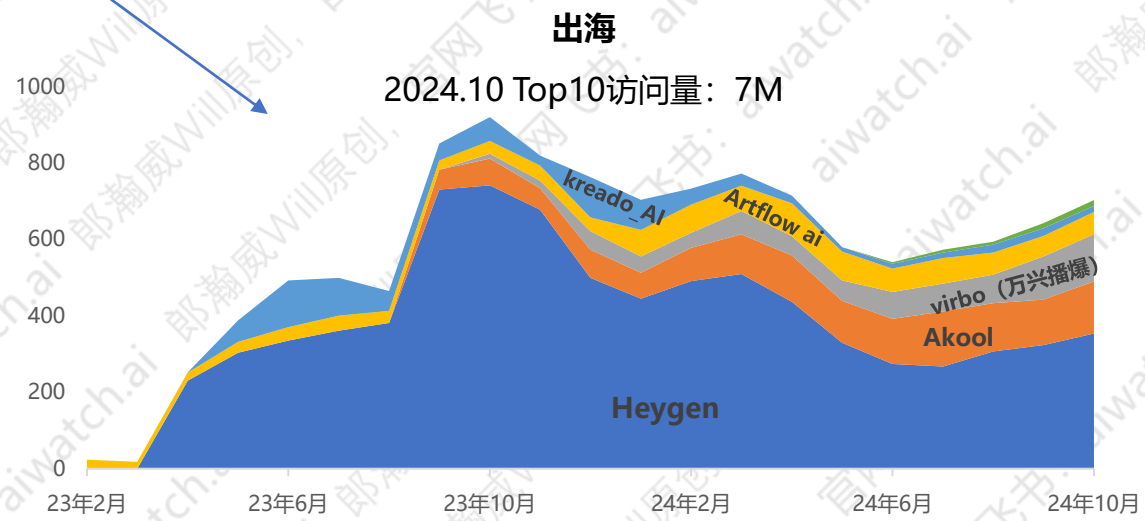
数据来源：similarweb 单位：万visit

数字人 国际 66% | 国产 2% | 出海 32%









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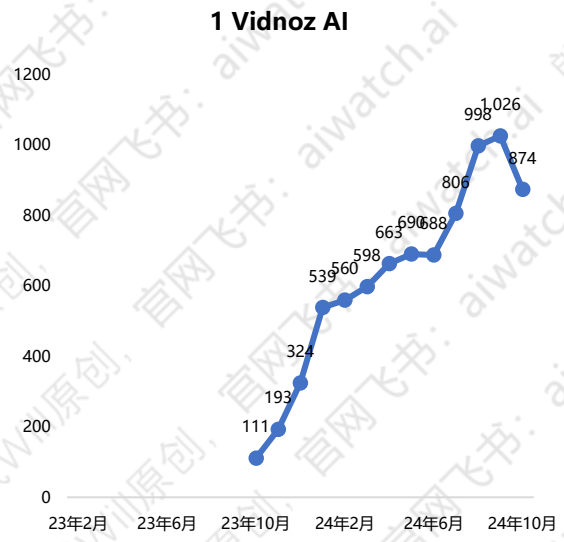
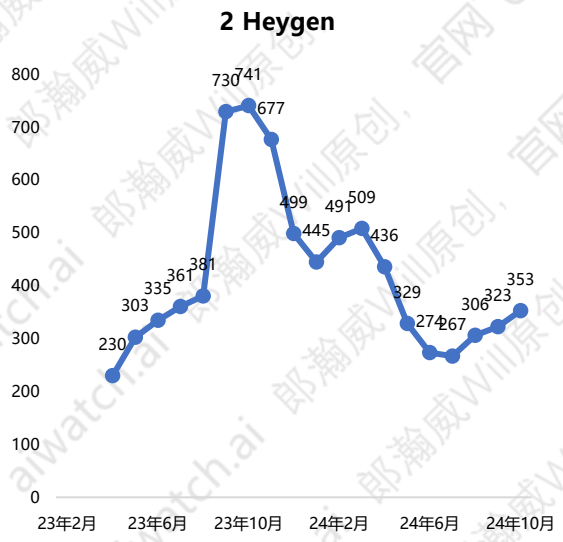
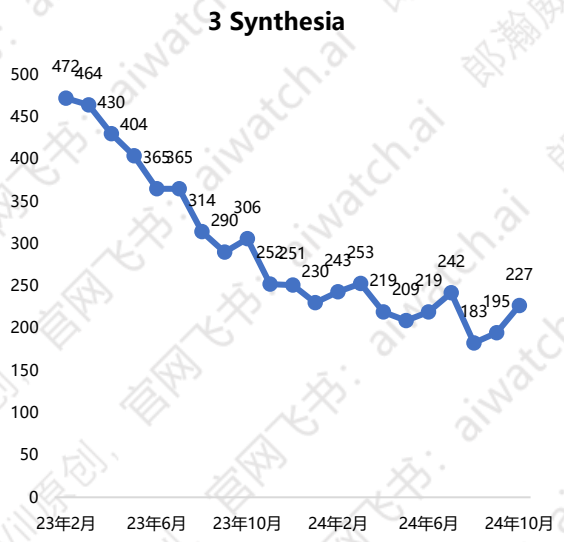
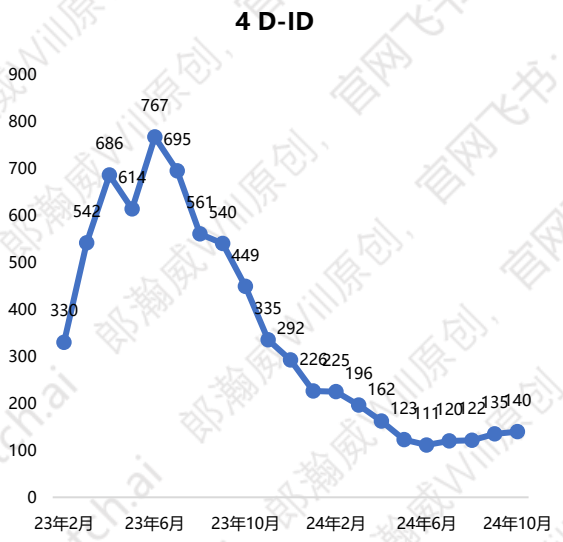
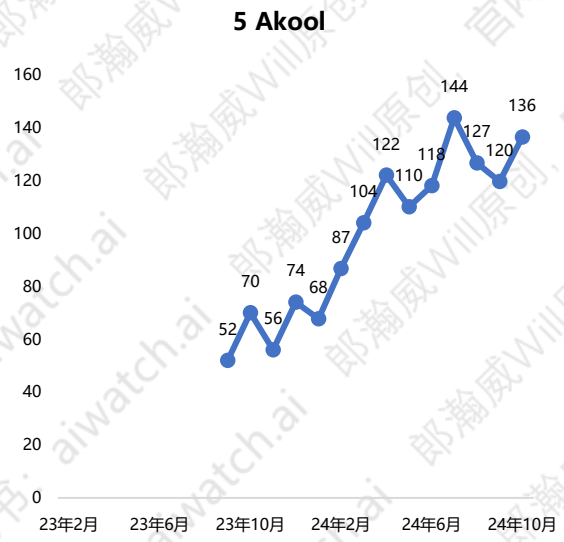
数字人 No.1-No.8

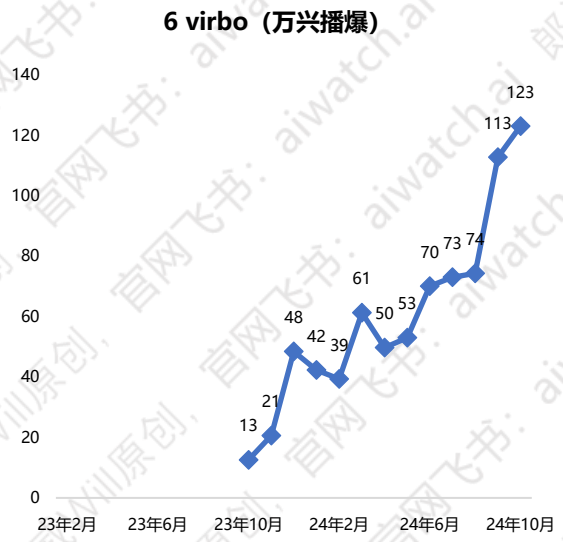


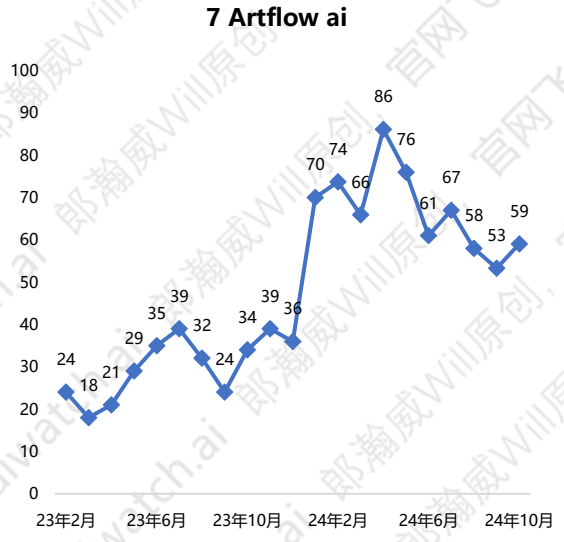


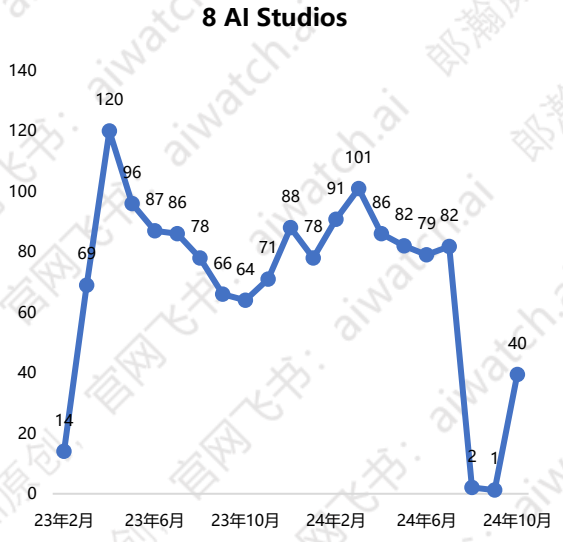






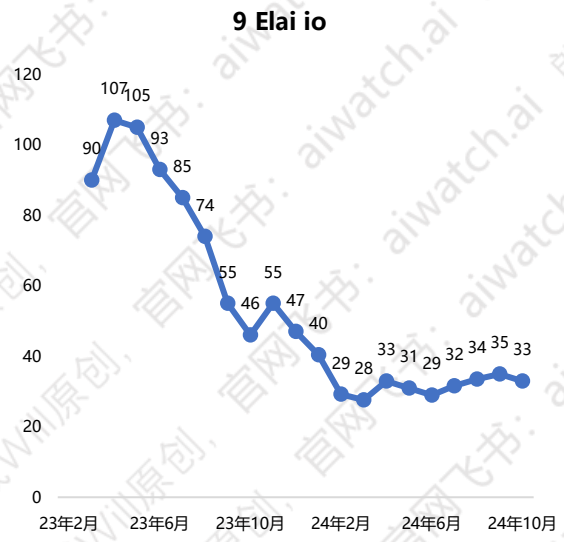


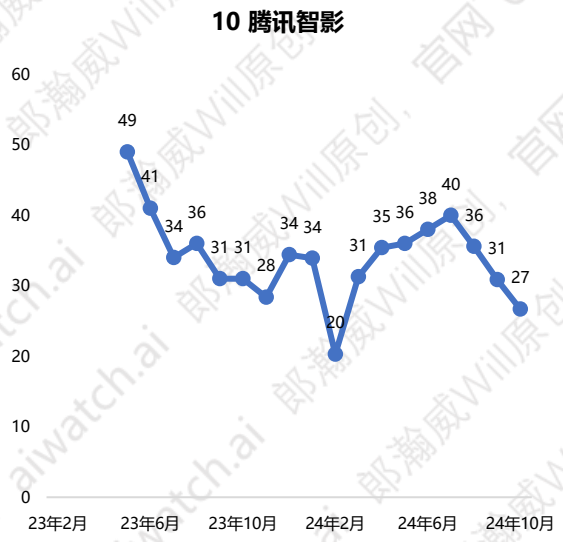


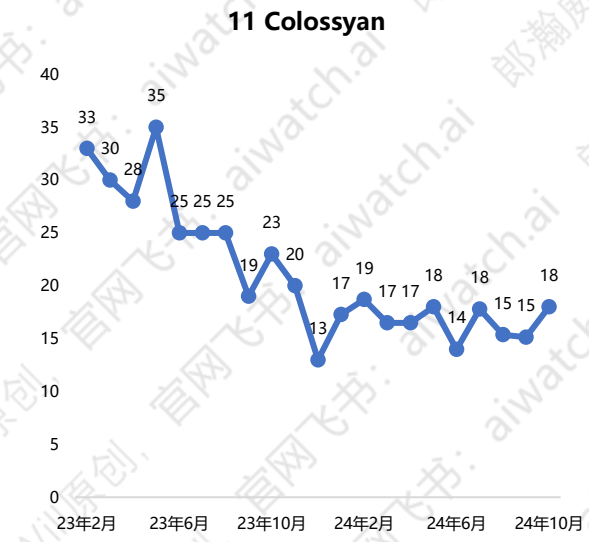


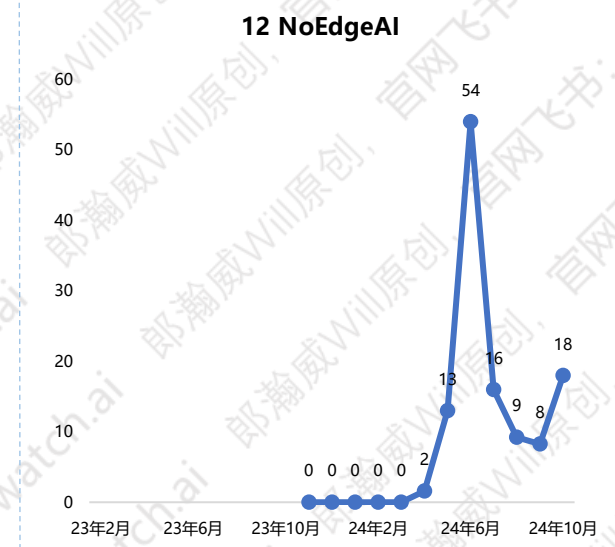
数据来源：similarweb 单位：万visit

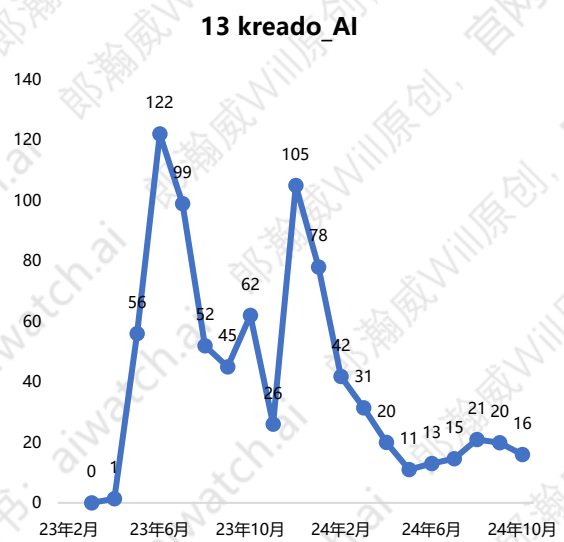
数字人 No.9-No.16

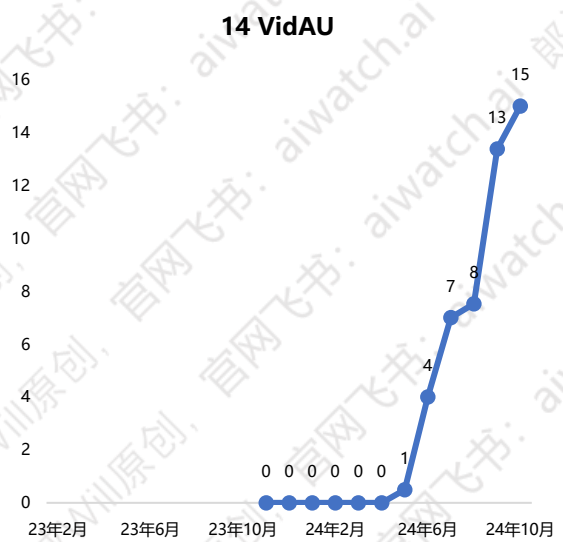


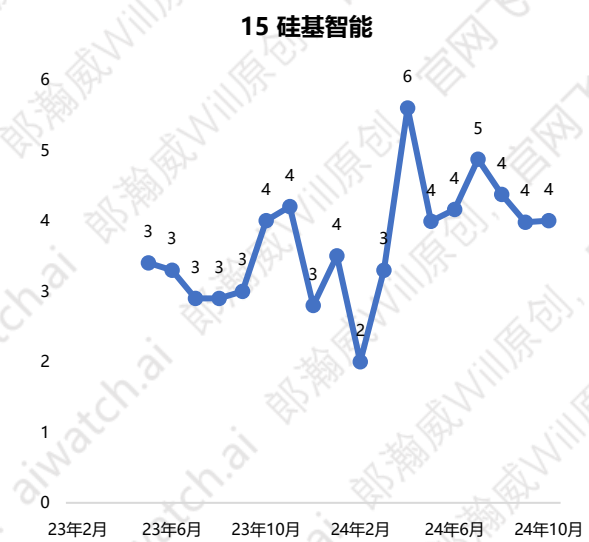


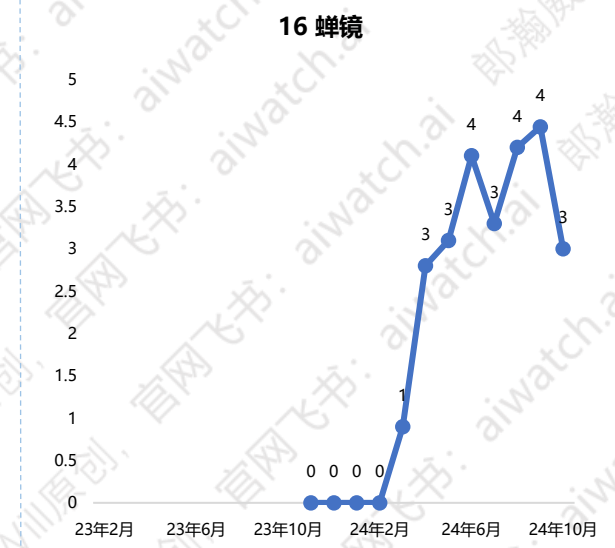






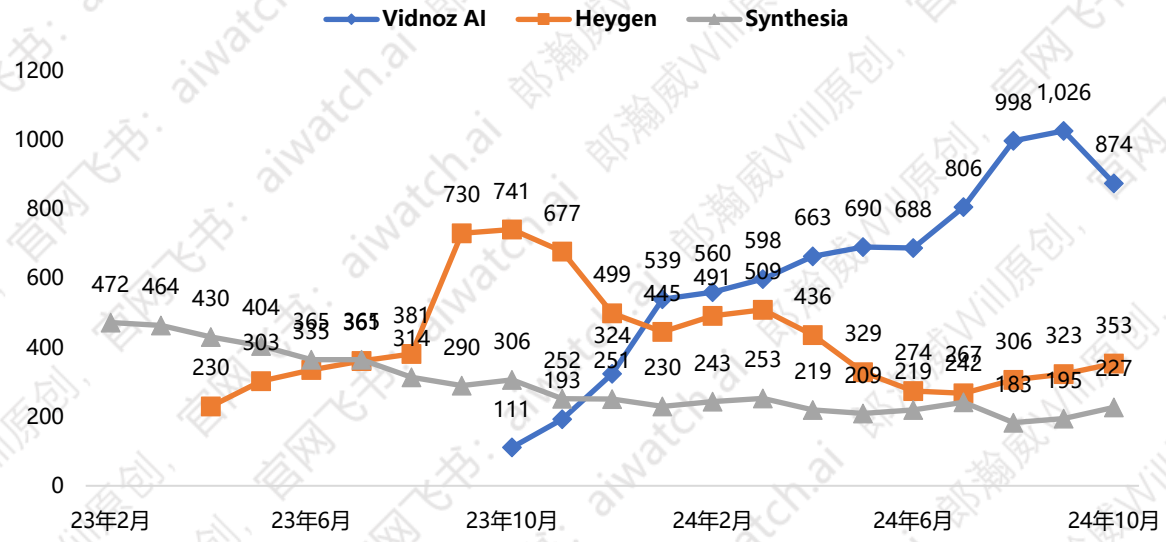


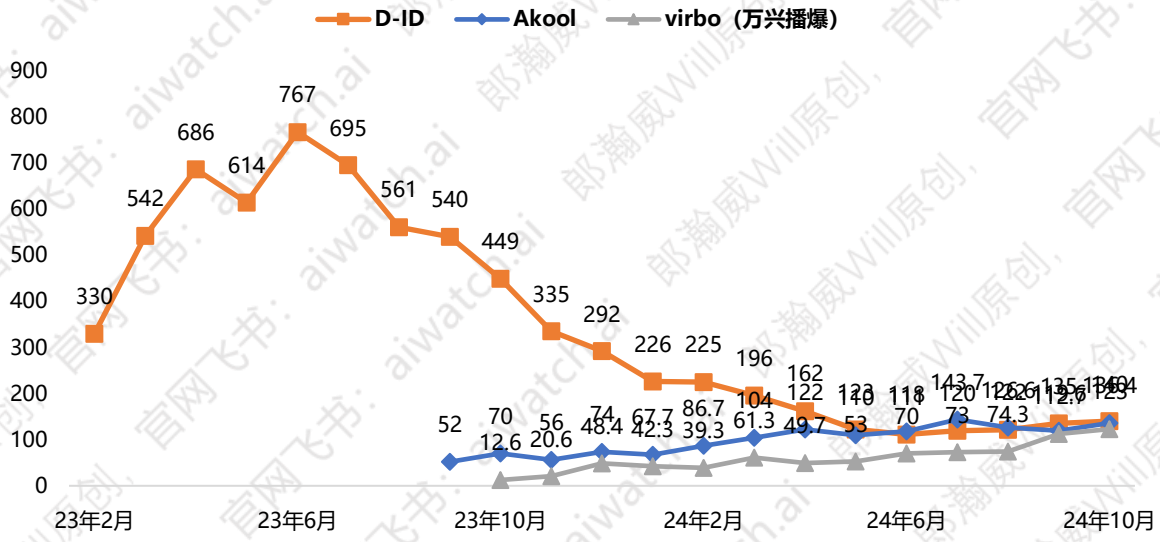


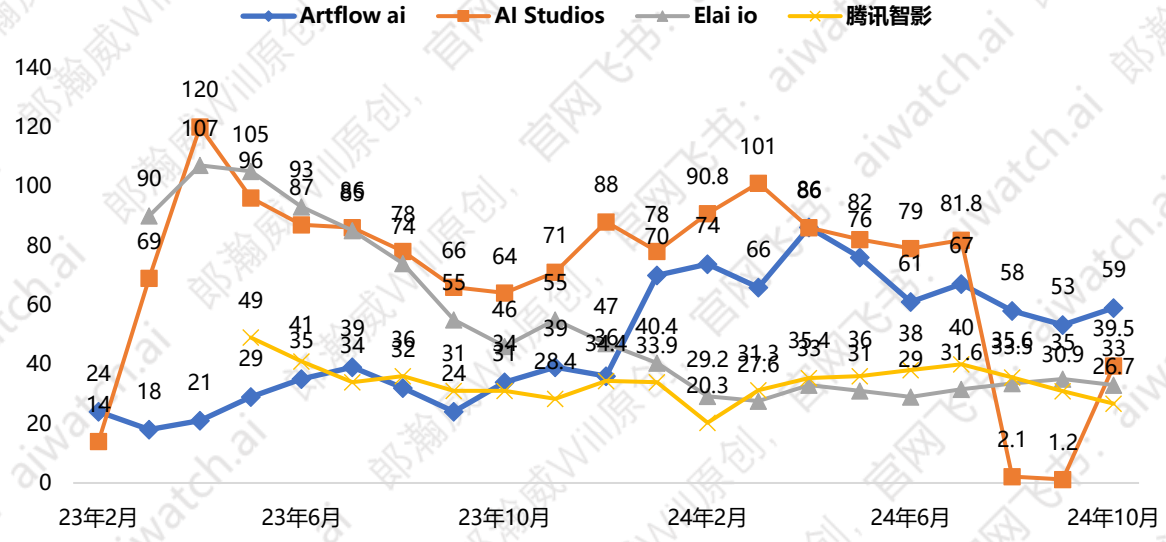


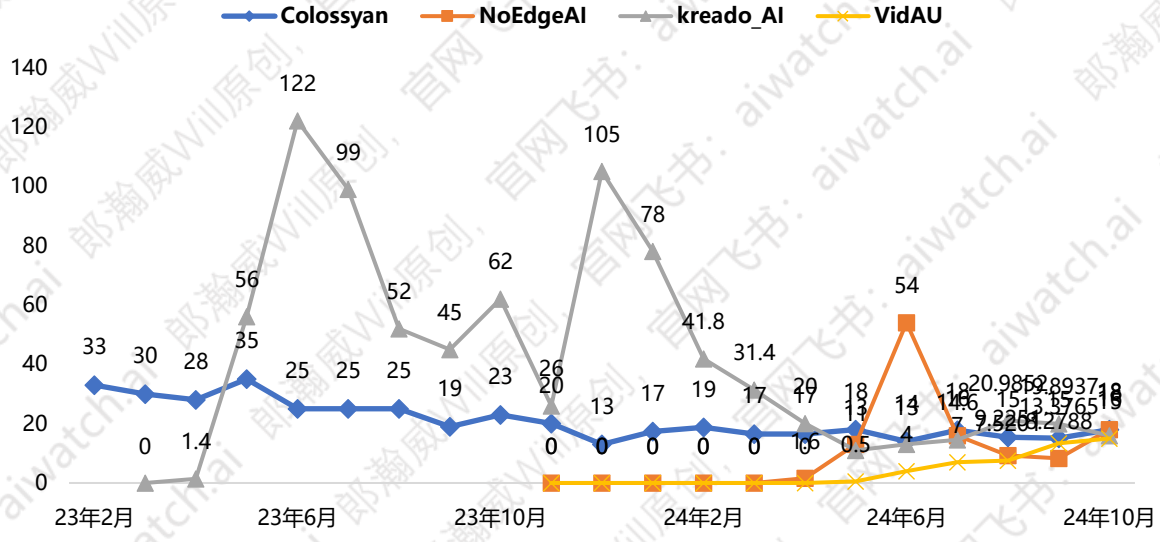
数据来源：similarweb 单位：万visit

数字人 复合图表









数据来源：similarweb 单位：万visit

会议总结

会议总结

会议总结 – Takeaway

1. 2024年10月会议总结赛道TOP15总访问量达到4205万次访问，市场规模相对稳健。
2. Otter AI、TurboScribe和Notta位居前三，访问量分别为682万、661万和463万次，显示市场已形成稳定的头部梯队。
3. 增长表现方面，Tactiq和Fathom 2.0增长最为显著，同比增长分别达到246%和221%，表明新兴玩家正在快速成长。
4. 融资方面，Read AI获得B轮5000万美元最为突出，而Tactiq和Fathom分别获得220万美元和1700万美元融资。
5. 从市场分布来看，美国依然是主要市场，但日本（Notta、Chatwork）和巴西（Transkriptor）的产品也展现出较强竞争力，市场呈现多元化趋势。
6. 会议总结工具正在从单纯的语音转写向智能总结、多语言支持、实时协作等方向拓展，功能日益丰富。
7. 细分领域方面，各家产品开始寻找差异化定位，如Chatwork在日本本土市场占比高达99%，显示出本地化策略的重要性。

数据来源：similarweb 单位：万visit

aiwatch.ai 郎瀚威Will原创 官网飞书

会议总结 - Top15

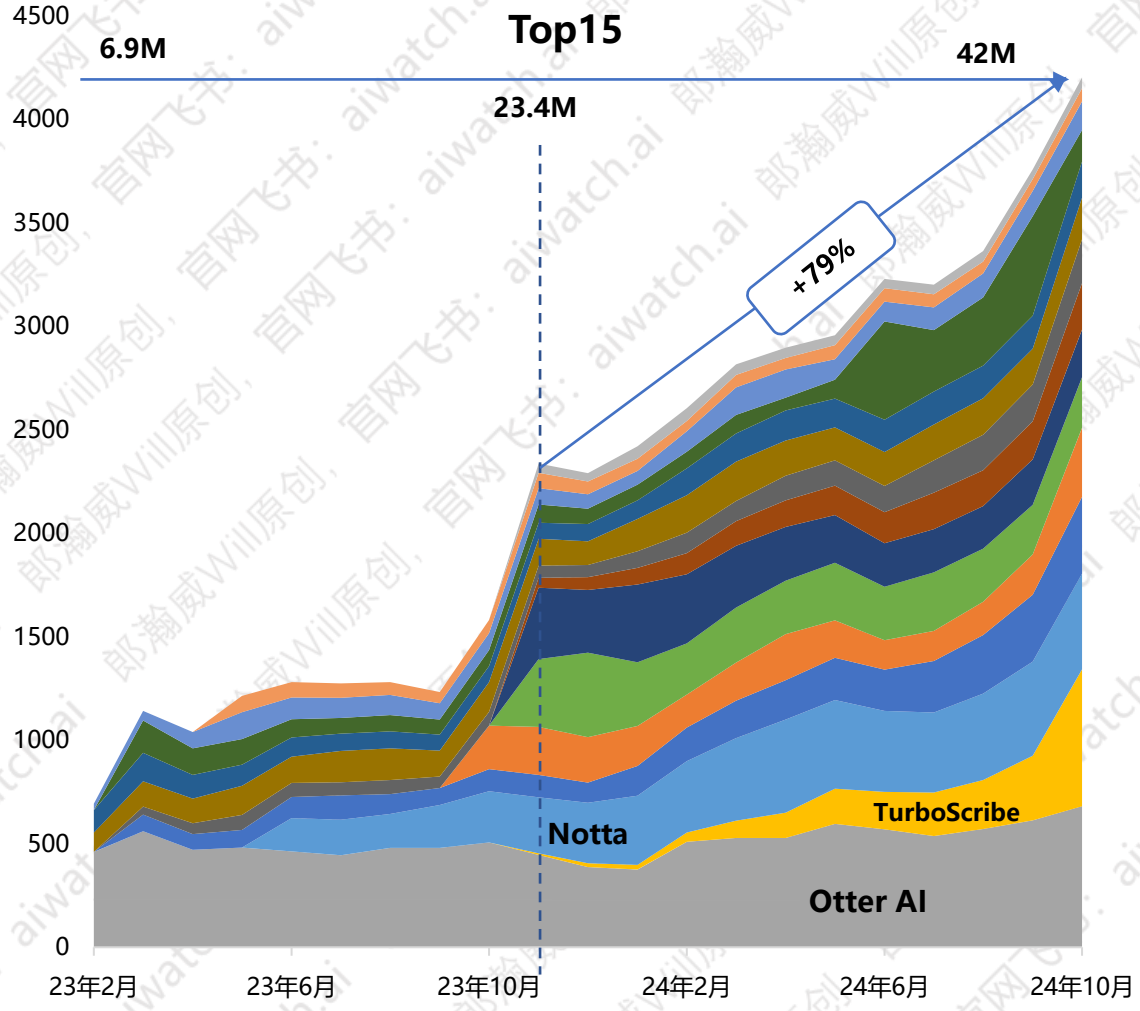
- **TOP15总融资额：6920万美元** (Tactiq (Tactiq 2.2M$)+Read AI (Read AI 50M$)+Fathom2.0 (Fathom 17M$)=69.2M$)
- **Top15 总网页流量：4205万次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Otter AI	506	682	35%	AISense	-	-	-	-	United States	51%
2	TurboScribe		661	-	TurboScribe	-	-	-	-	United States	16%
3	Notta	248	463	87%	思维巡航	-	-	-	13	Japan	32%
4	Tactiq	107	371	246%	Tactiq	种子轮	2023/5/31	2.2	-	United States	18%
5	Transkriptor	211	333	58%	Transkriptor	-	-	-	-	Brazil	10%
6	Chatwork		245	-	Chatwork	-	-	-	-	Japan	99%
7	Happy Scribe		230	-	Happy Scribe	-	-	-	-	United States	11%
8	Read AI		225	-	Read AI	B轮	2024/10/28	50	-	United States	28%
9	Fathom 2.0	66	212	221%	Fathom	A轮	2024/9/19	17	-	United States	51%
10	fireflies.ai	144	201	40%	fireflies.ai	-	-	-	-	United States	38%
11	Krisp	77	175	127%	Krisp	-	-	-	-	United States	25%
12	Glasp	78	152	94%	Glasp	-	-	-	-	United States	13%
13	tl;dv	82	138	68%	tl;dv	-	-	-	-	Brazil	17%
14	讯飞听见	62	64	3%	科大讯飞	-	-	-	-	China	86%
15	FELLOW		52	-	FELLOW	-	-	-	-	United States	54%

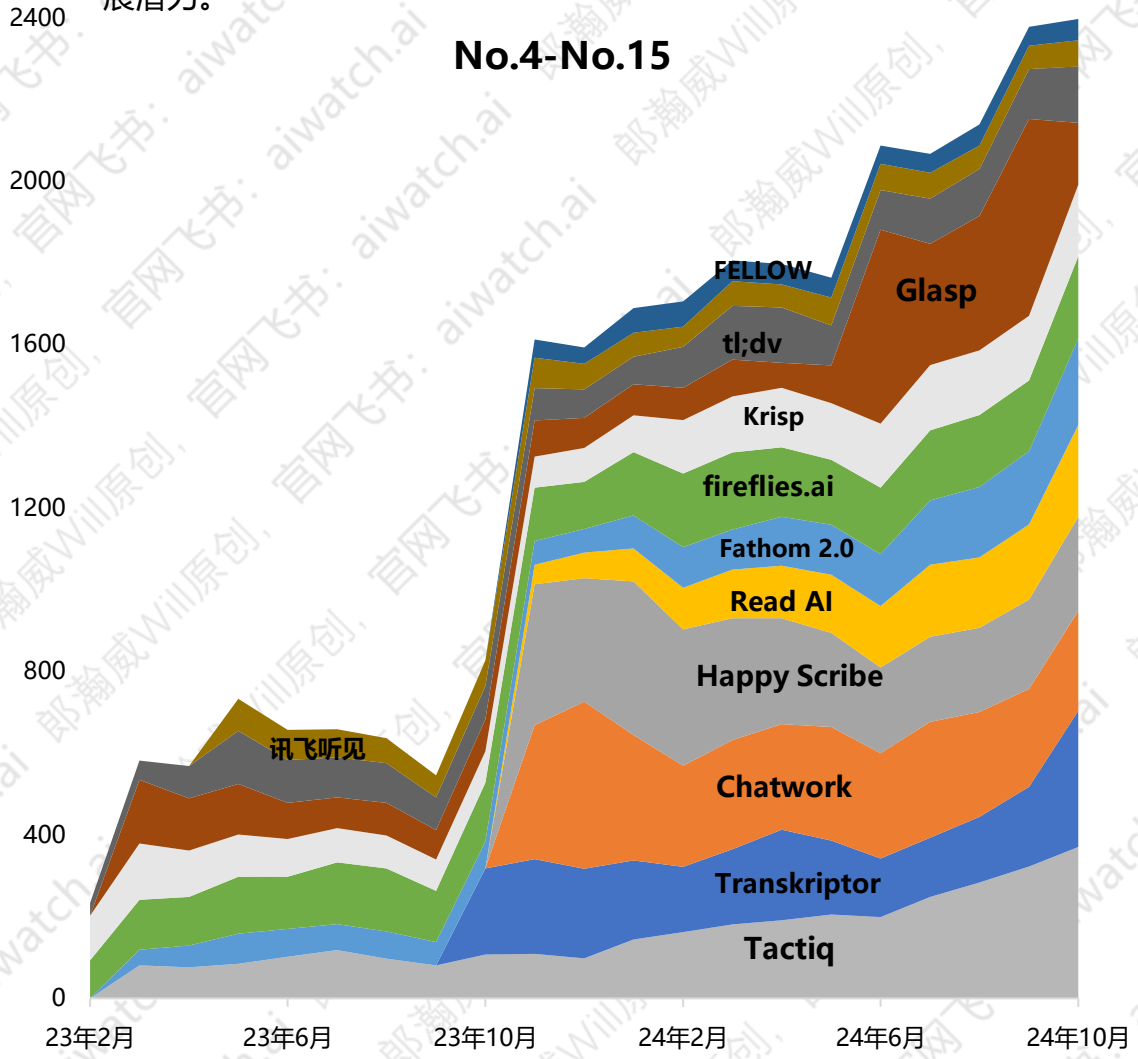
数据来源：similarweb 单位：万visit

会议总结 网页流量趋势 10月总量：4205万

- Otter AI呈现稳定上升趋势，始终保持领先地位，市场份额稳步扩大。TurboScribe作为新兴力量迅速崛起，与Notta共同构成第一梯队的新格局。



- Tactiq和Transkriptor展现出强劲增长势头，分别以246%和58%的增长率快速追赶。Chatwork、Happy Scribe等新进入者也展现出良好的发展潜力。

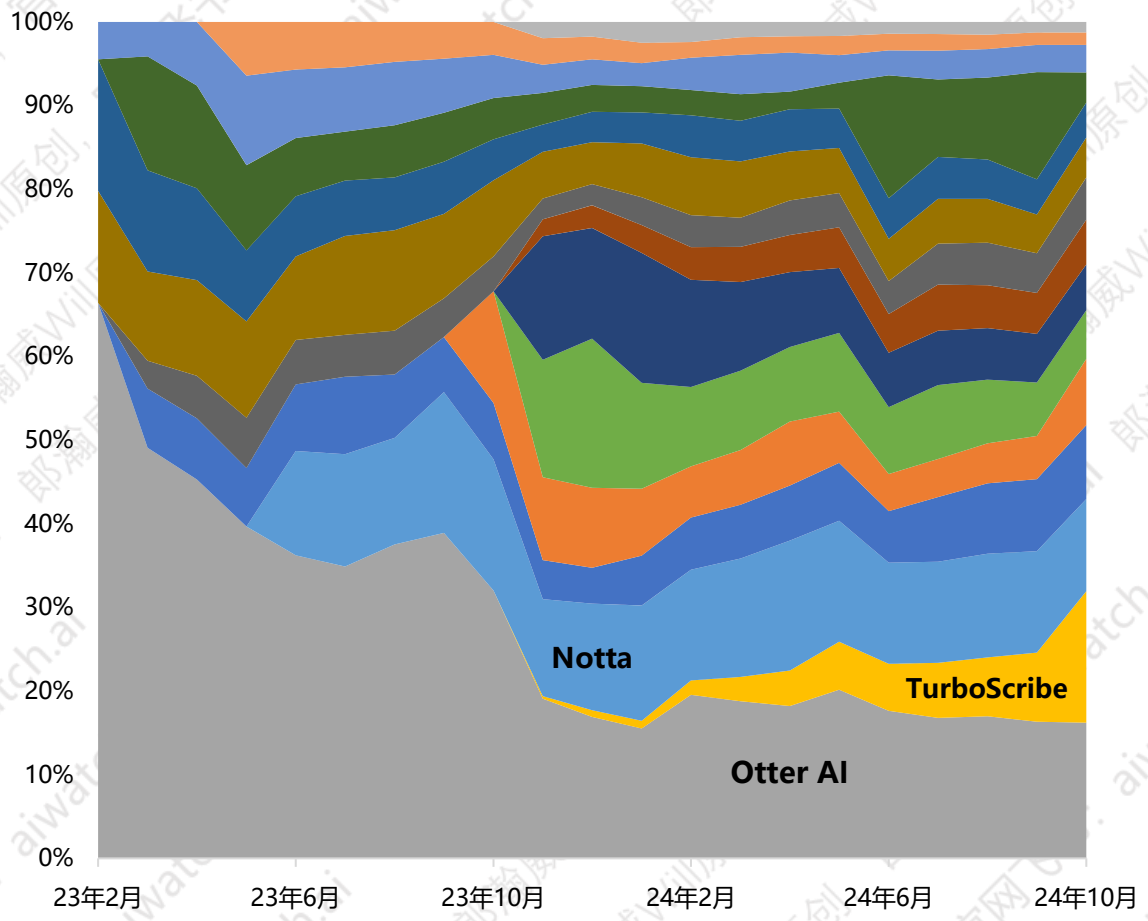


数据来源：similarweb 单位：万visit

会议总结 2023.2~2024.10 网页流量占比

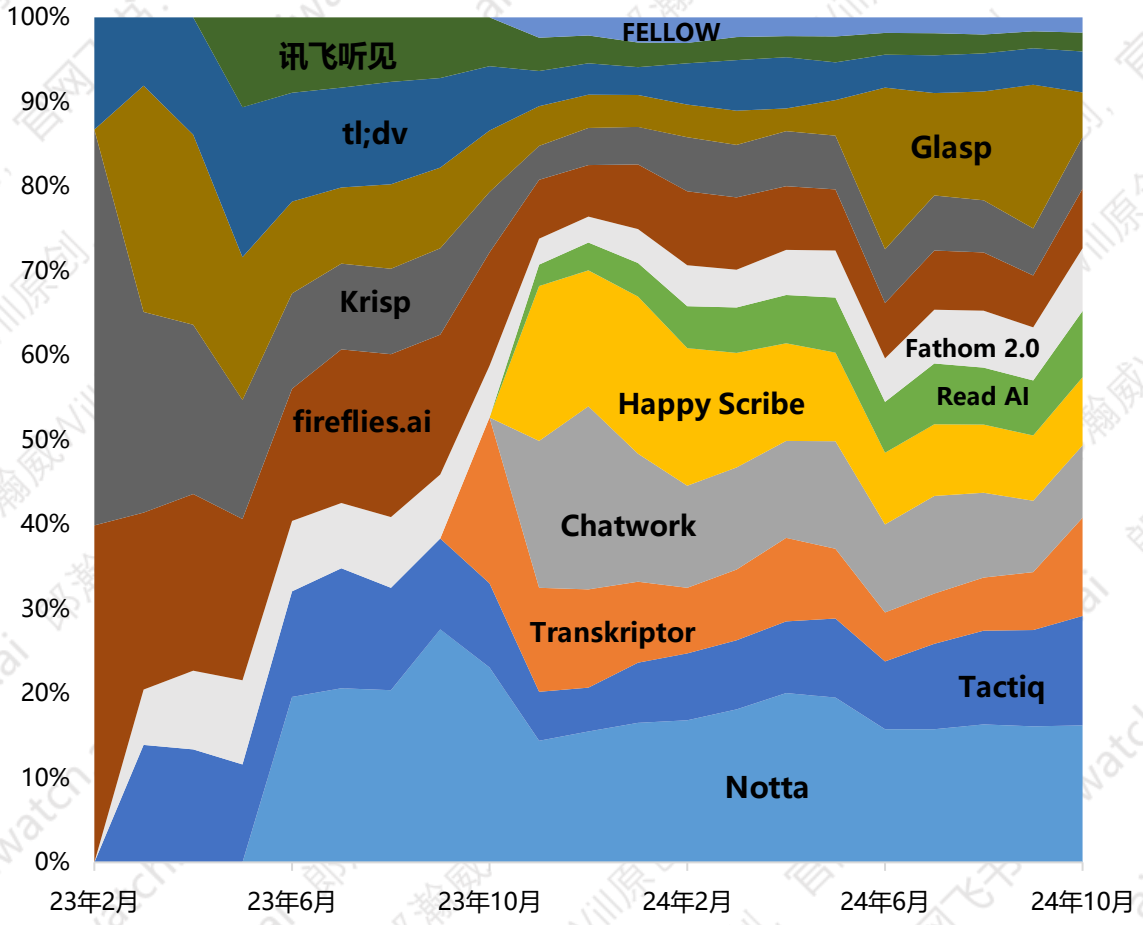
- 从Top15占比图看，Otter AI的市场份额保持稳定领先，占据约30%市场份额。TurboScribe快速崛起，目前已占据约15%的市场。Notta的份额相对稳定，维持在15%左右。

Top15占比



- 在No.3-No.15梯队中，Tactiq的份额显著提升，从10%攀升至接近20%。Transkriptor、Chatwork和Happy Scribe的份额较为稳定，各占5%-10%不等。

No.3-No.15占比



数据来源：similarweb 单位：万visit

会议总结 国际 | 国产 | 出海 Top10

国际

- Otter AI领跑，TurboScribe紧随其后。

序号	产品名称	24年10月(万visit)
1	Otter AI	682
2	TurboScribe	661
3	Tactiq	371
4	Transkriptor	333
5	Chatwork	245
6	Happy Scribe	230
7	Read AI	225
8	Fathom 2.0	212
9	fireflies.ai	201
10	Krisp	175

国产

- 讯飞听见独占鳌头，访问量64万次，通义听悟位居第二。

序号	产品名称	24年10月(万visit)
1	讯飞听见	64
2	通义听悟	30
3	讯飞听见会记	13
4	BibiGPT	-

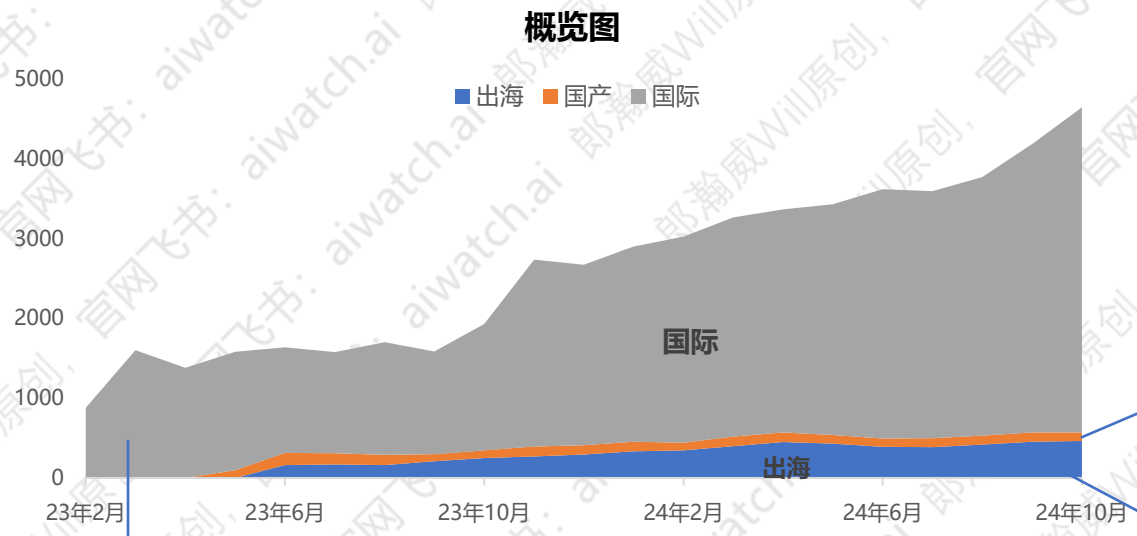
出海

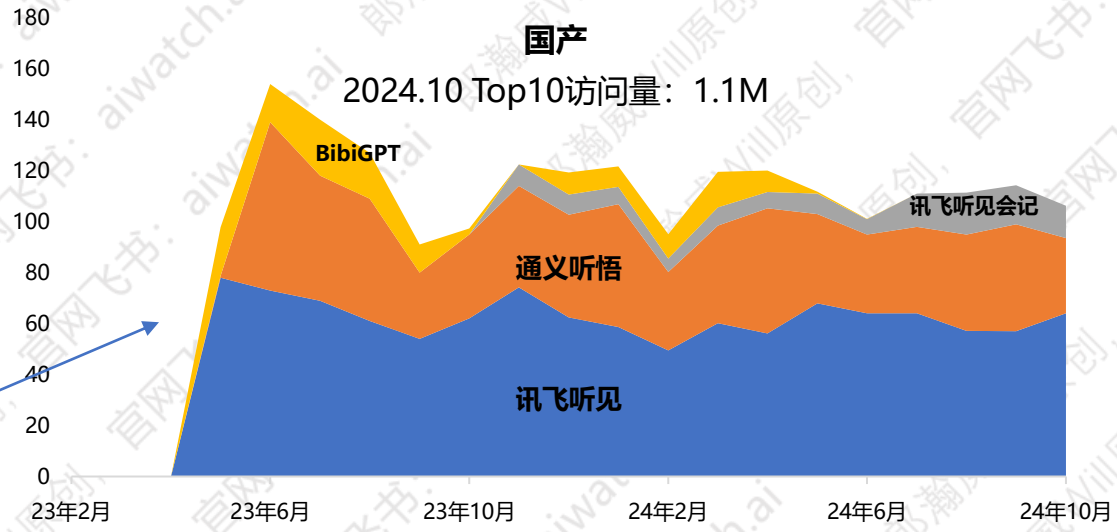
- Notta一支独秀，访问量达463万次。

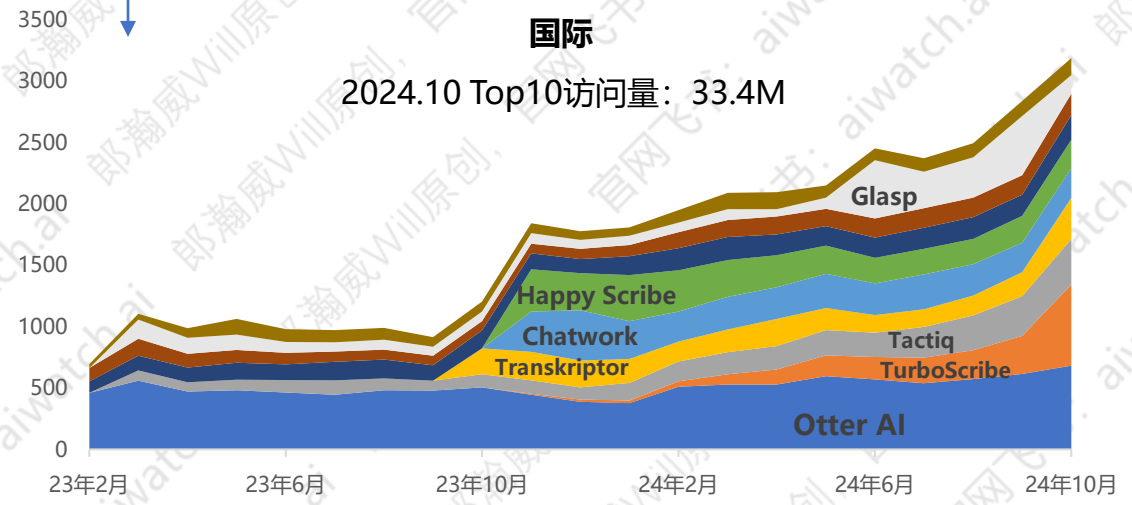
序号	产品名称	24年10月(万visit)
1	Notta	463

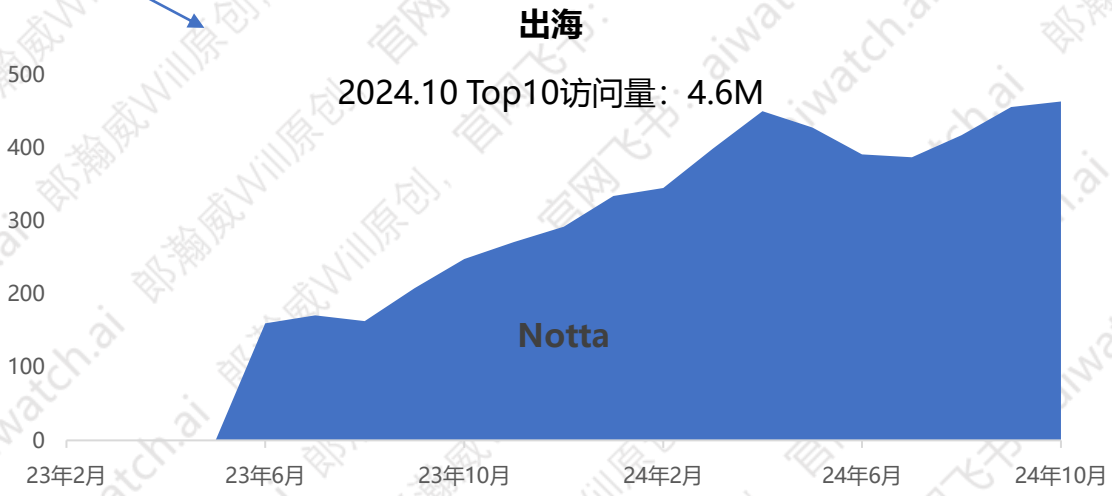
数据来源：similarweb 单位：万visit

会议总结 国际 86% | 国产 4% | 出海 10%



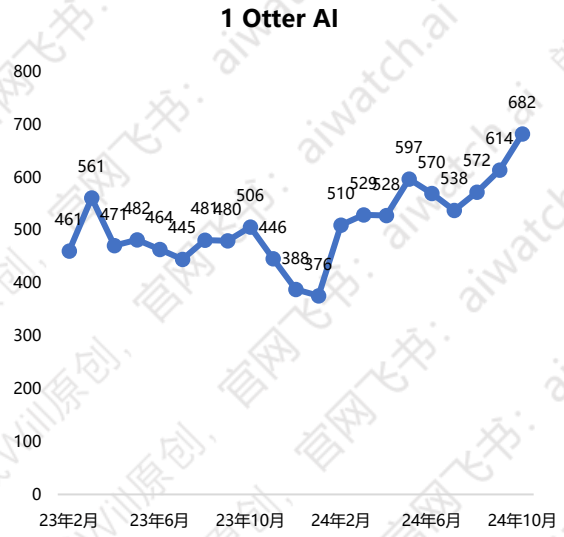


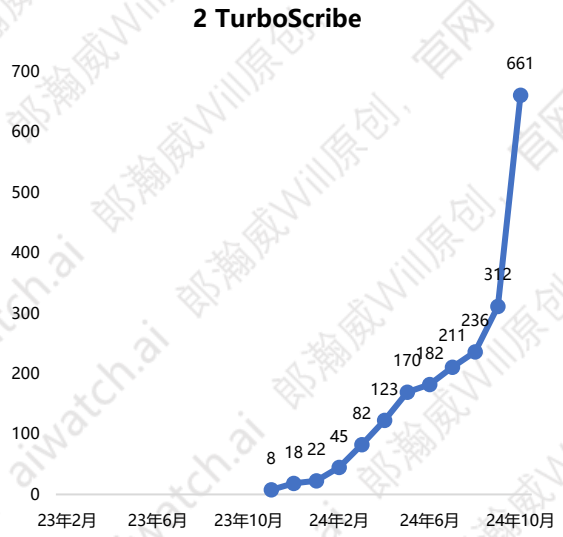


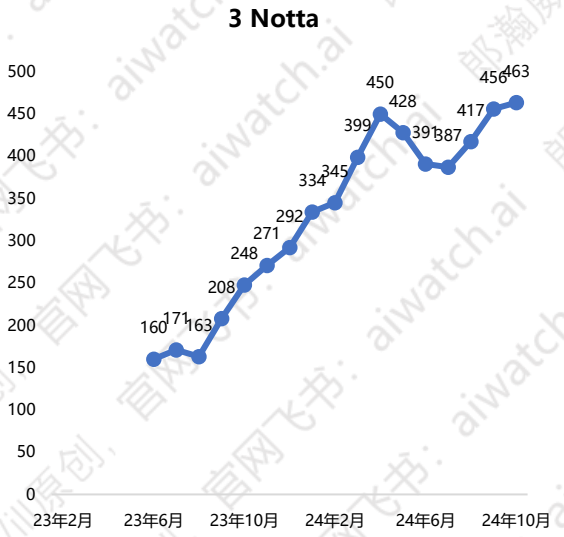


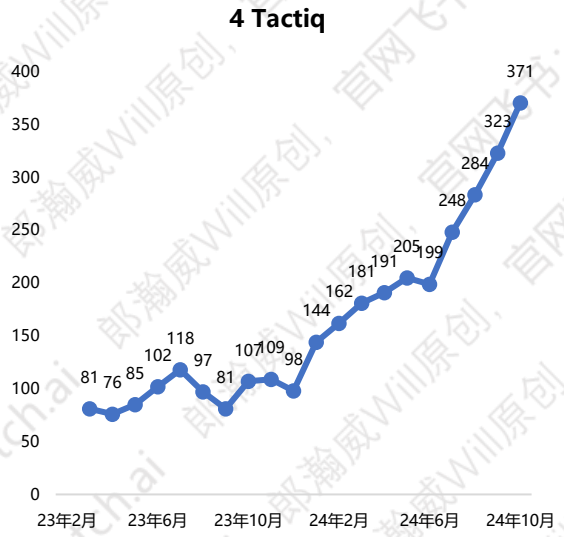
数据来源：similarweb 单位：万visit

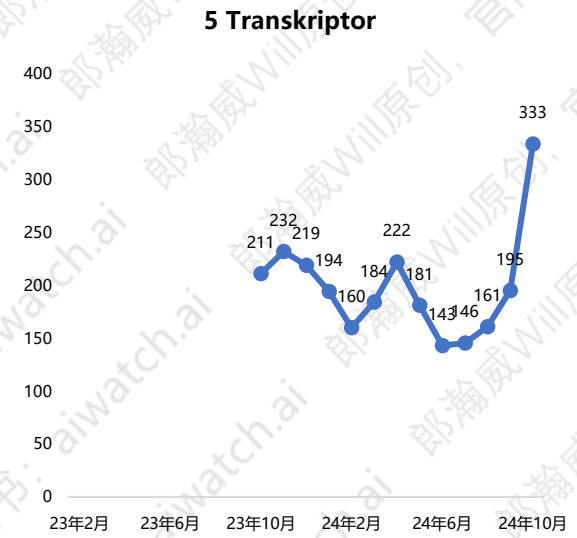
会议总结 No.1-No.8

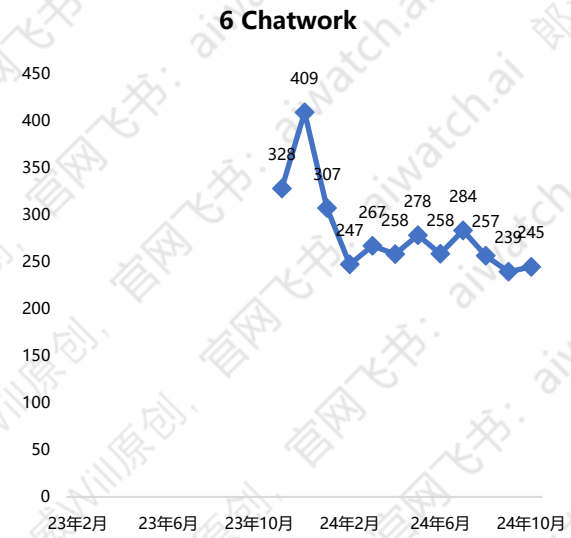


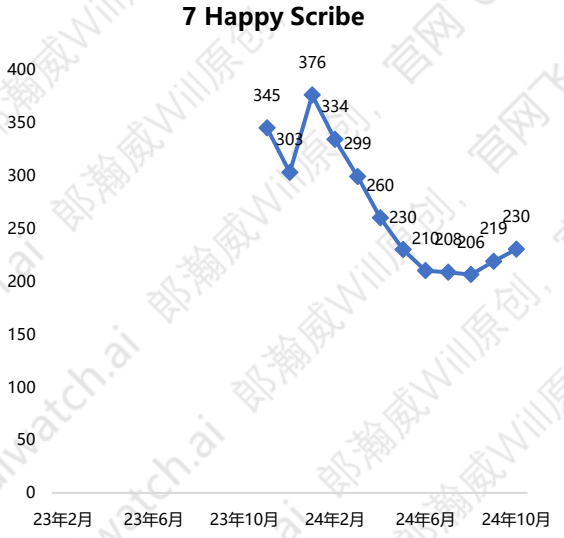


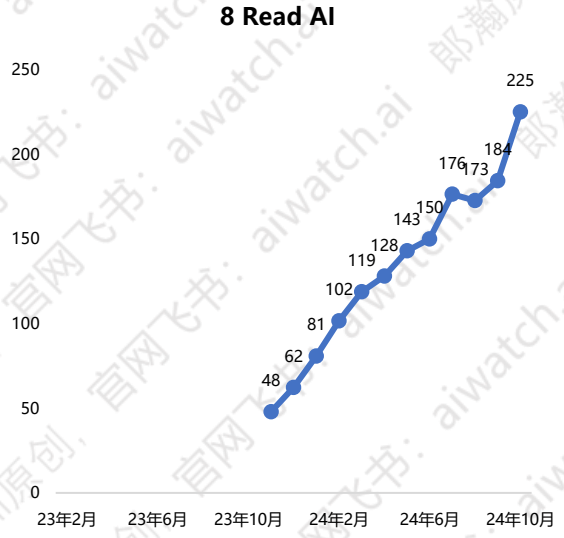






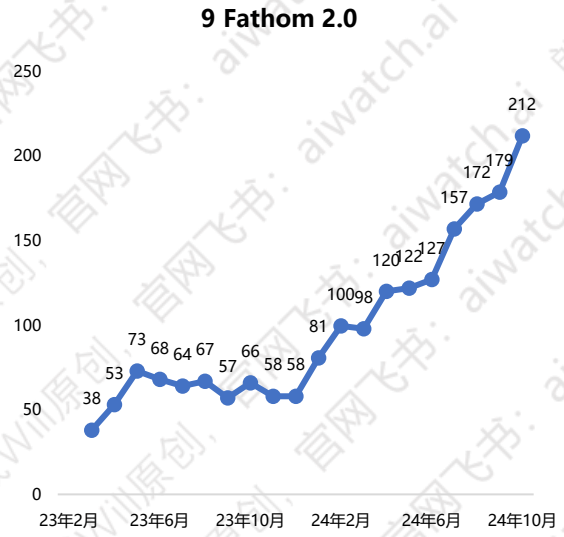


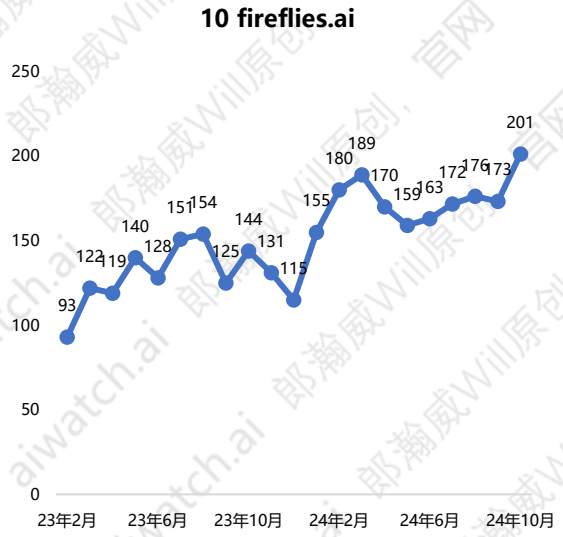


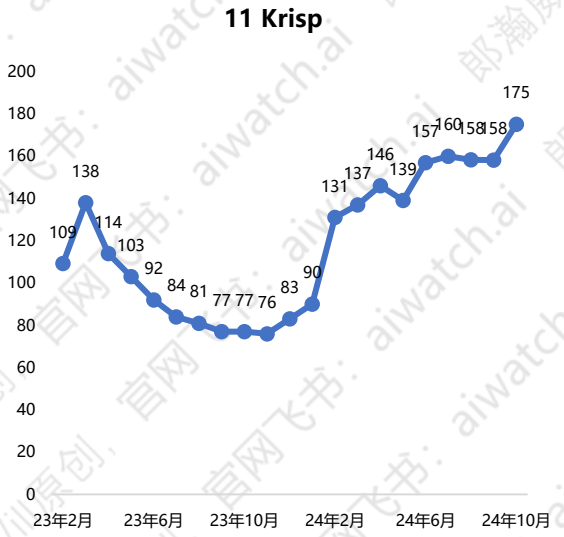


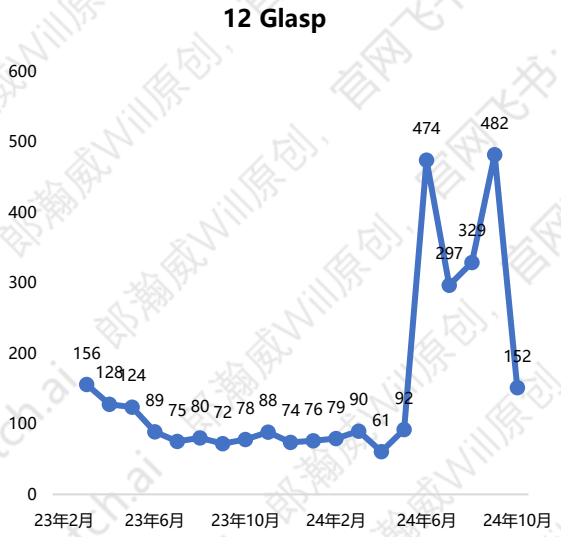
数据来源：similarweb 单位：万visit

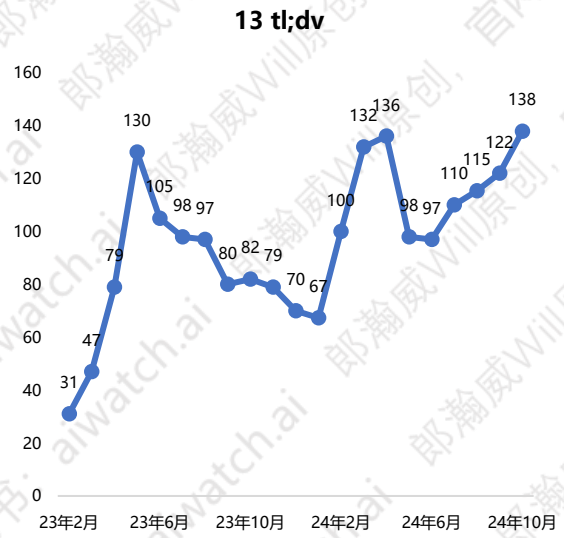
会议总结 No.9-No.16

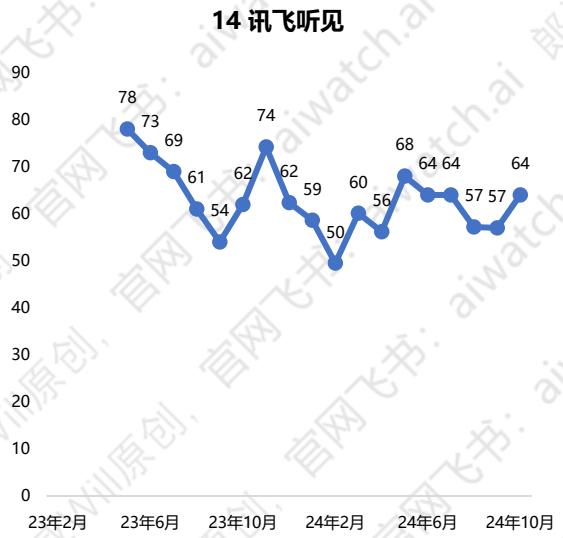


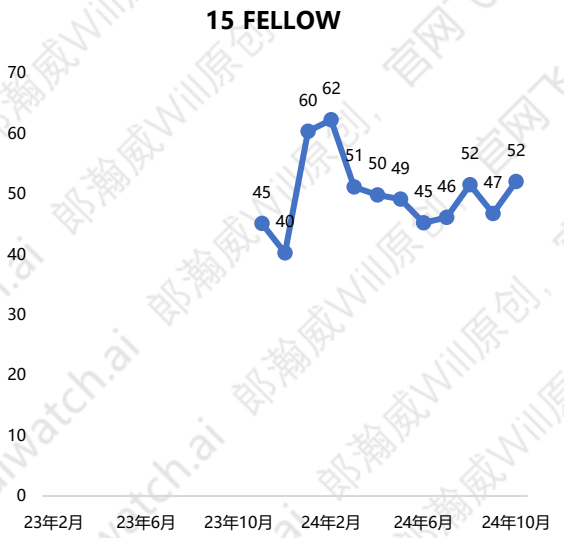


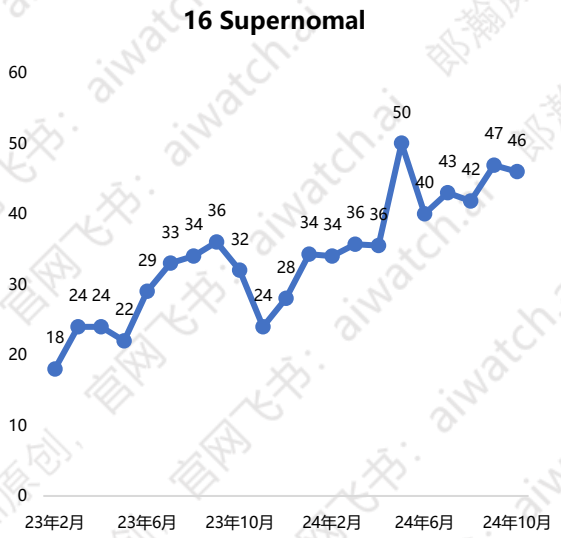






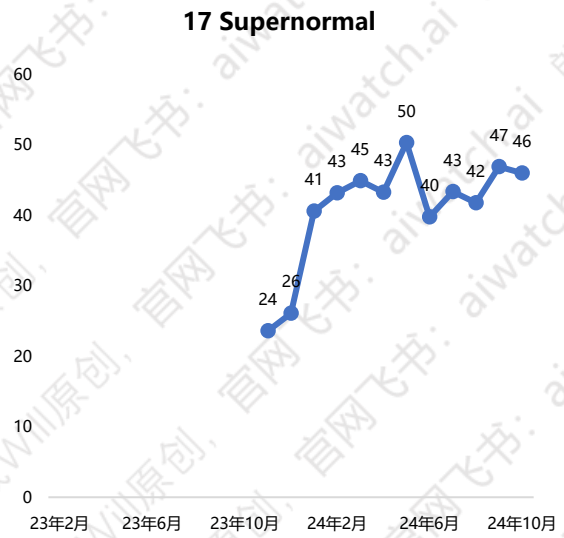


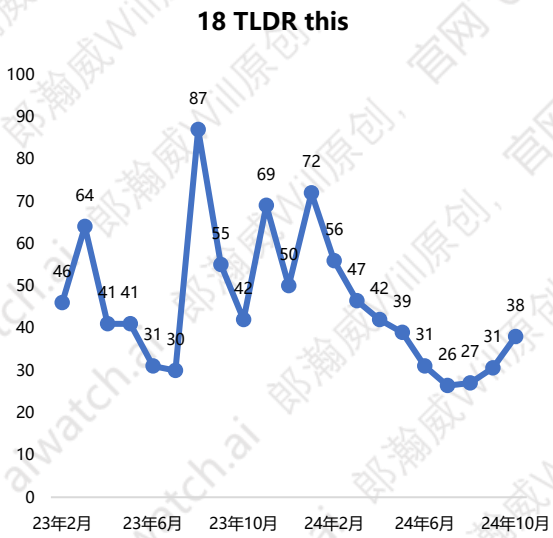


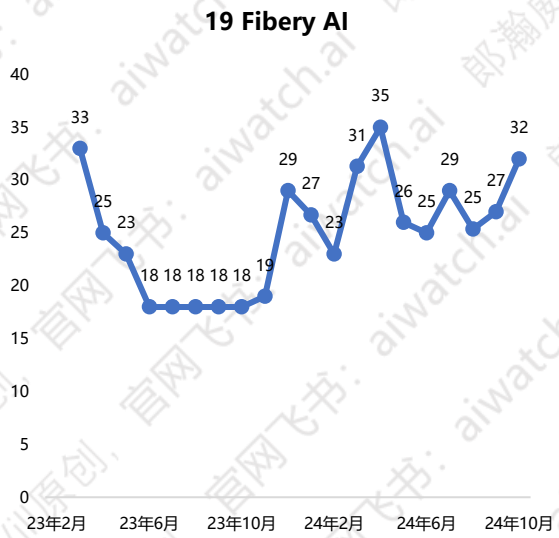


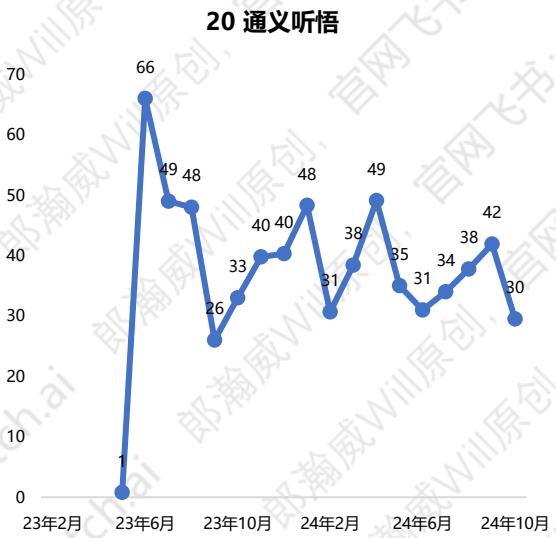
数据来源：similarweb 单位：万visit

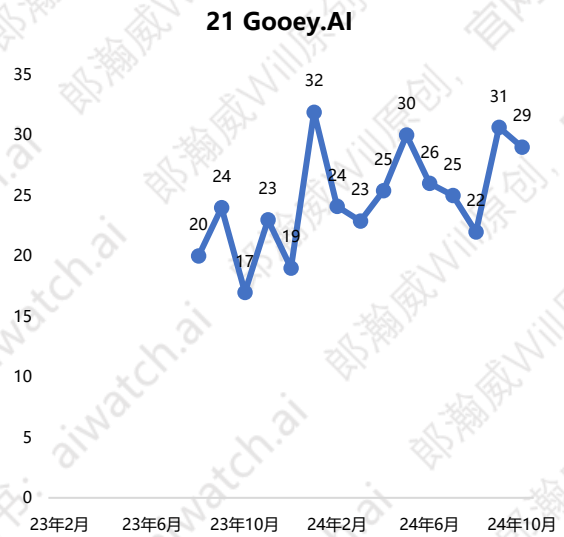
会议总结 No.17-No.24

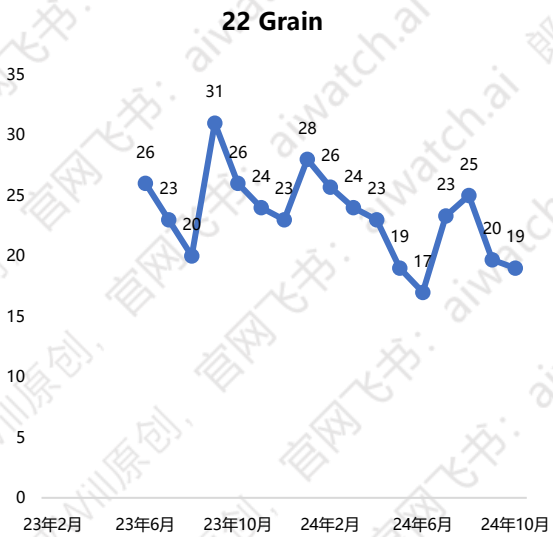


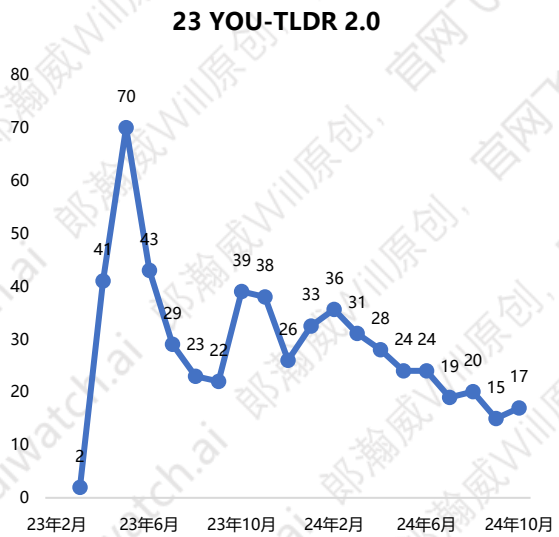


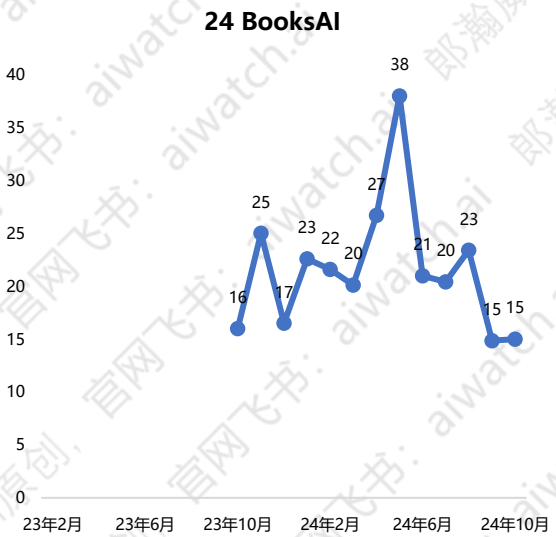






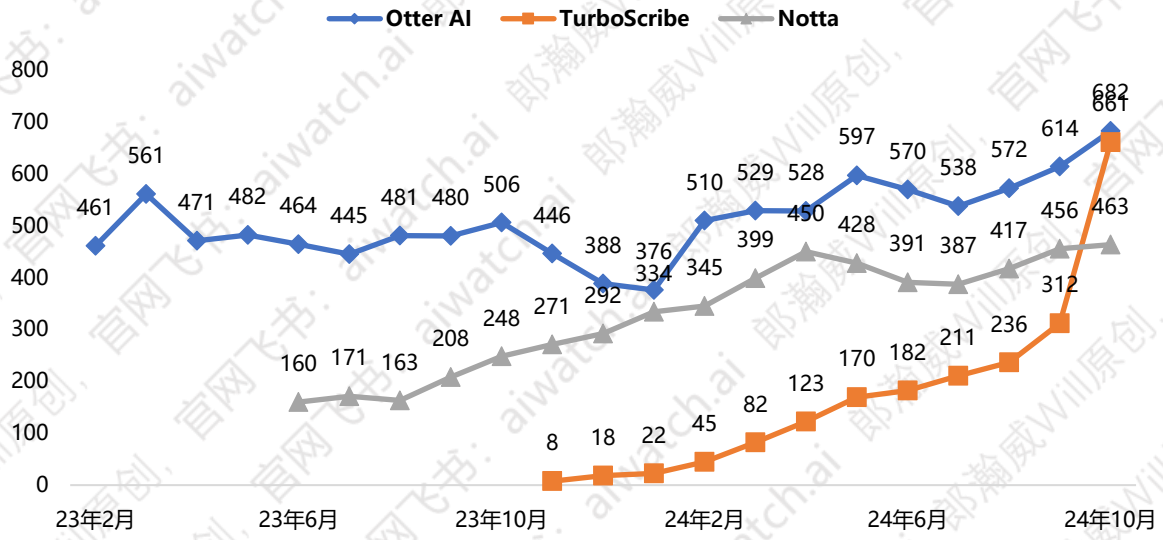


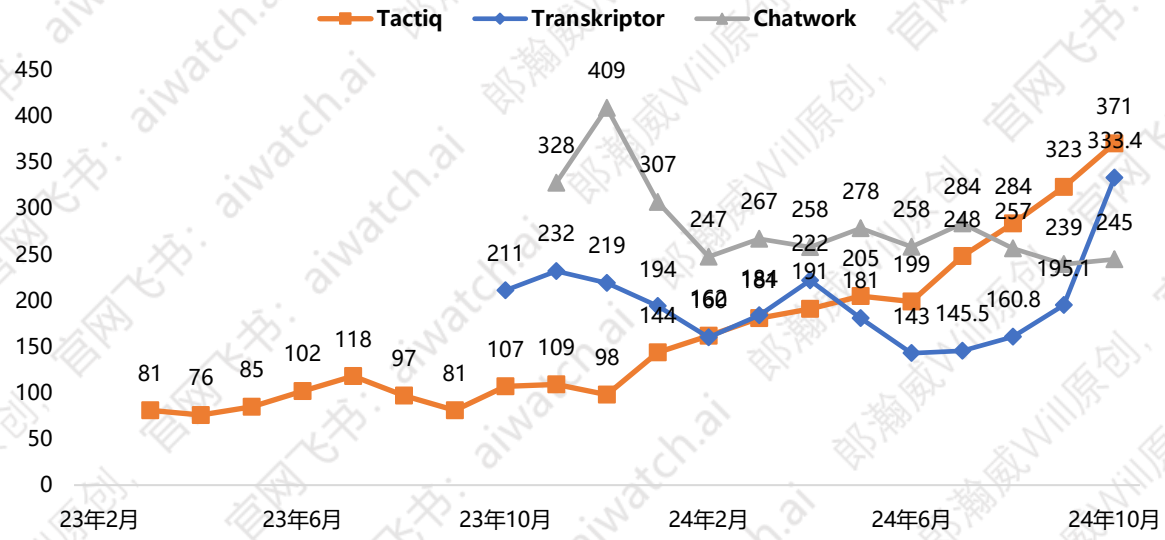


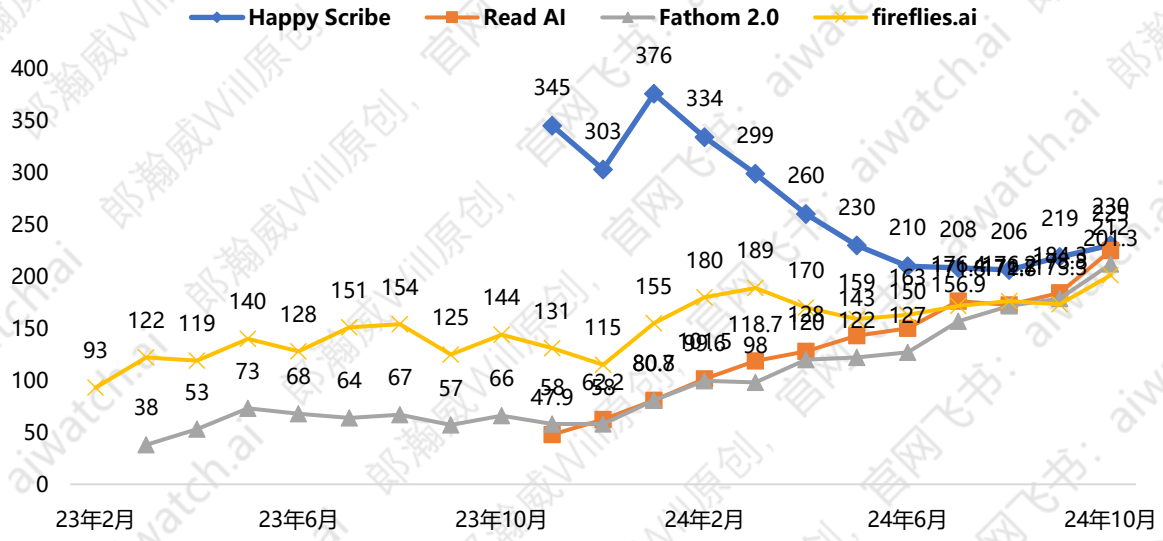


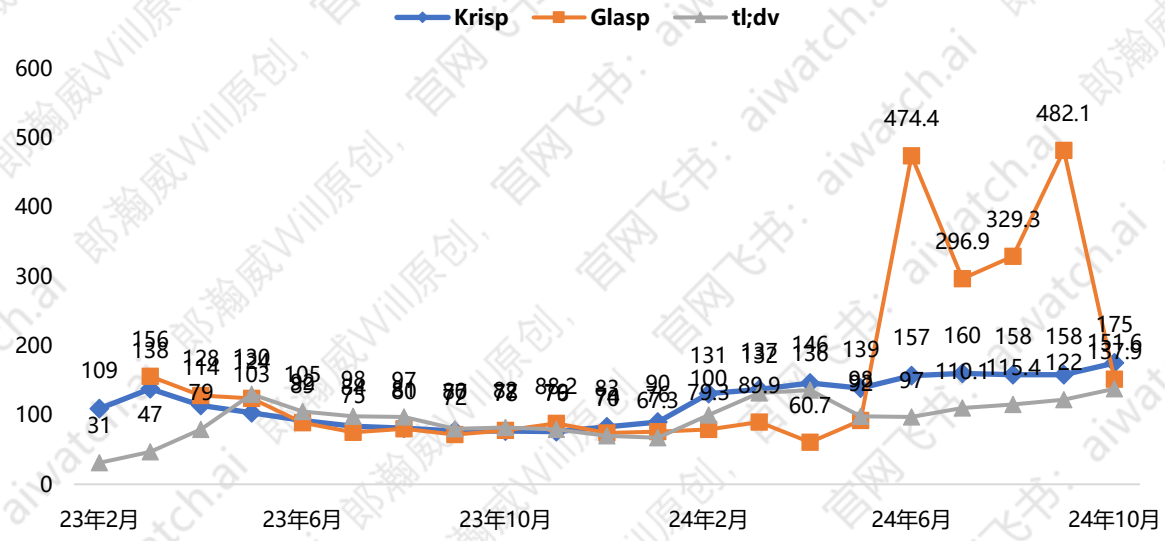
数据来源：similarweb 单位：万visit

会议总结 复合图表









数据来源：similarweb 单位：万visit

通用写作

通用写作

通用写作 - Takeaway

1. 2024年10月，通用写作赛道Top15产品的总访问量达到1.9亿次。
2. 前三名产品分别为Quillbot Paraphraser、Grammarly和LanguageTool，月访问量分别为8033万次、6810万次和915万次，头部效应明显。
3. 增长最为亮眼的是HIX.AI和Stealth Writer，同比增速分别达到750%和317%，新兴AI写作工具的快速崛起。
4. 近期融资信息，Copy.ai于2023年11月获得300万美元风险投资轮融资。
5. 排名前列的产品多以改写和语法检查功能为主，如Quillbot Paraphraser和Grammarly的市场份额合计超过65%，用户对文本优化需求强劲。
6. AI驱动的写作工具（如HIX.AI、Stealth Writer）正在快速崛起，该赛道正在向智能化、自动化方向演进。

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

通用写作 - Top15

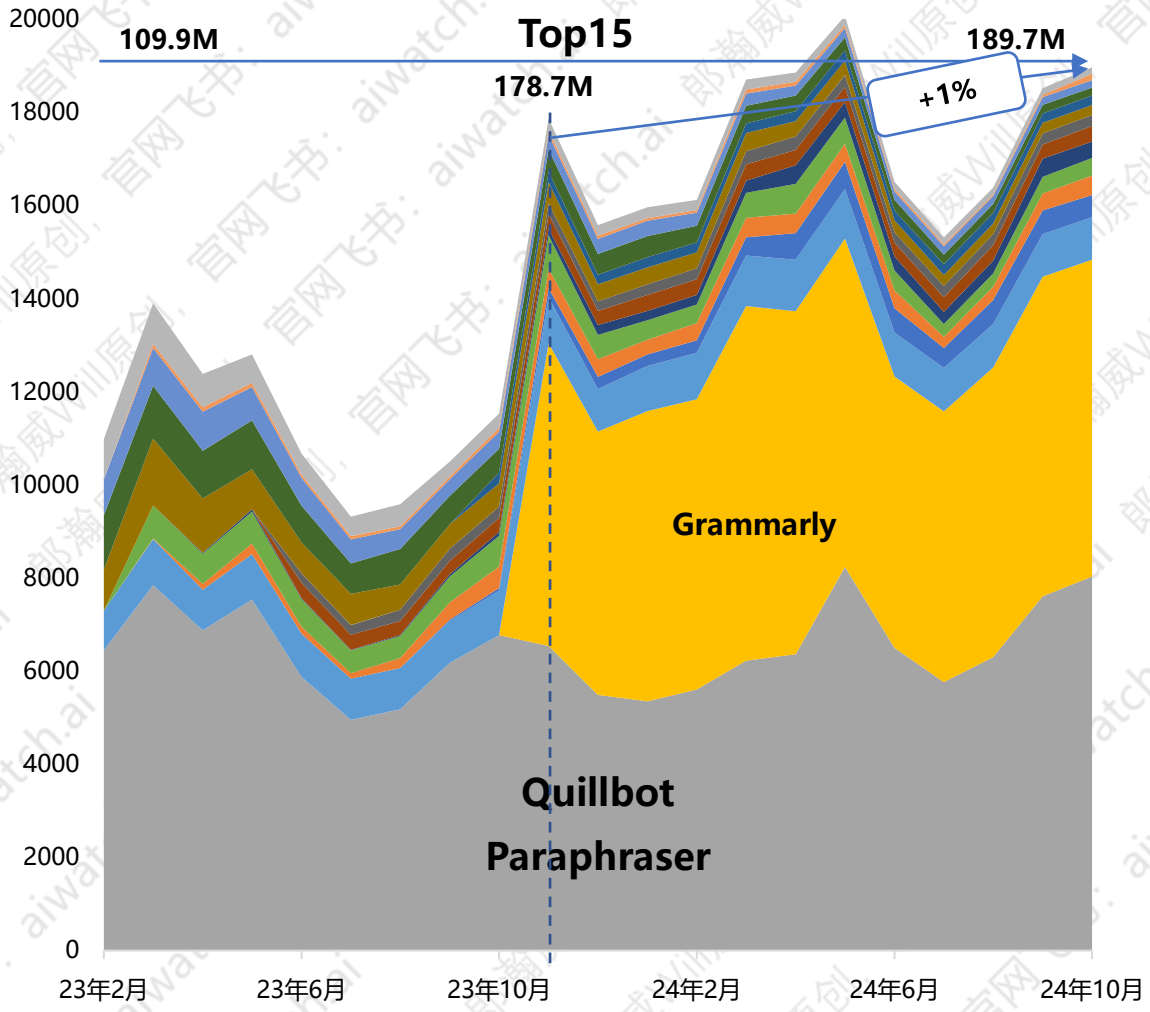
- **TOP15总融资额：300万美元** (Copy.ai (Copy.ai 3M$))
- **Top15 总网页流量：1.9亿次visit**

序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Quillbot Paraphraser	6,780	8,033	18%	Quillbot Paraphraser	-	-	-	35	United States	22%
2	Grammarly		6,810	-	Grammarly	-	-	-	-	United States	43%
3	LanguageTool	955	915	-4%	LanguageTooler GmbH	-	-	-	-	Brazil	19%
4	HIX.AI	56	476	750%	HIX.AI	-	-	-	-	United States	8%
5	Undetectable.ai	457	416	-9%	Undetectable	-	-	-	-	United States	22%
6	Smodin	660	377	-43%	Smodin	-	-	-	-	Brazil	17%
7	Stealth Writer	85	354	317%	Stealth Writer	-	-	-	-	Philippines	16%
8	Buffer	300	333	11%	Buffer	-	-	-	-	United States	33%
9	Grammar Checker	243	234	-4%	Grammar Checker	-	-	-	-	United States	25%
10	Wordtune	503	216	-57%	Wordtune	-	-	-	-	United States	34%
11	ProWritingAid	233	207	-11%	ProWritingAid	-	-	-	-	United States	53%
12	Writesonic	505	171	-66%	Writesonic	-	-	-	-	United States	14%
13	Copy.ai	364	157	-57%	Copy.ai	风险投资轮	2023/11/3	3	-	United States	28%
14	Intelligent paraphraser	89	141	58%	Intelligent paraphraser	-	-	-	-	United States	20%
15	Jasper.ai	302	132	-56%	Writesonic	-	-	-	-	United States	31%

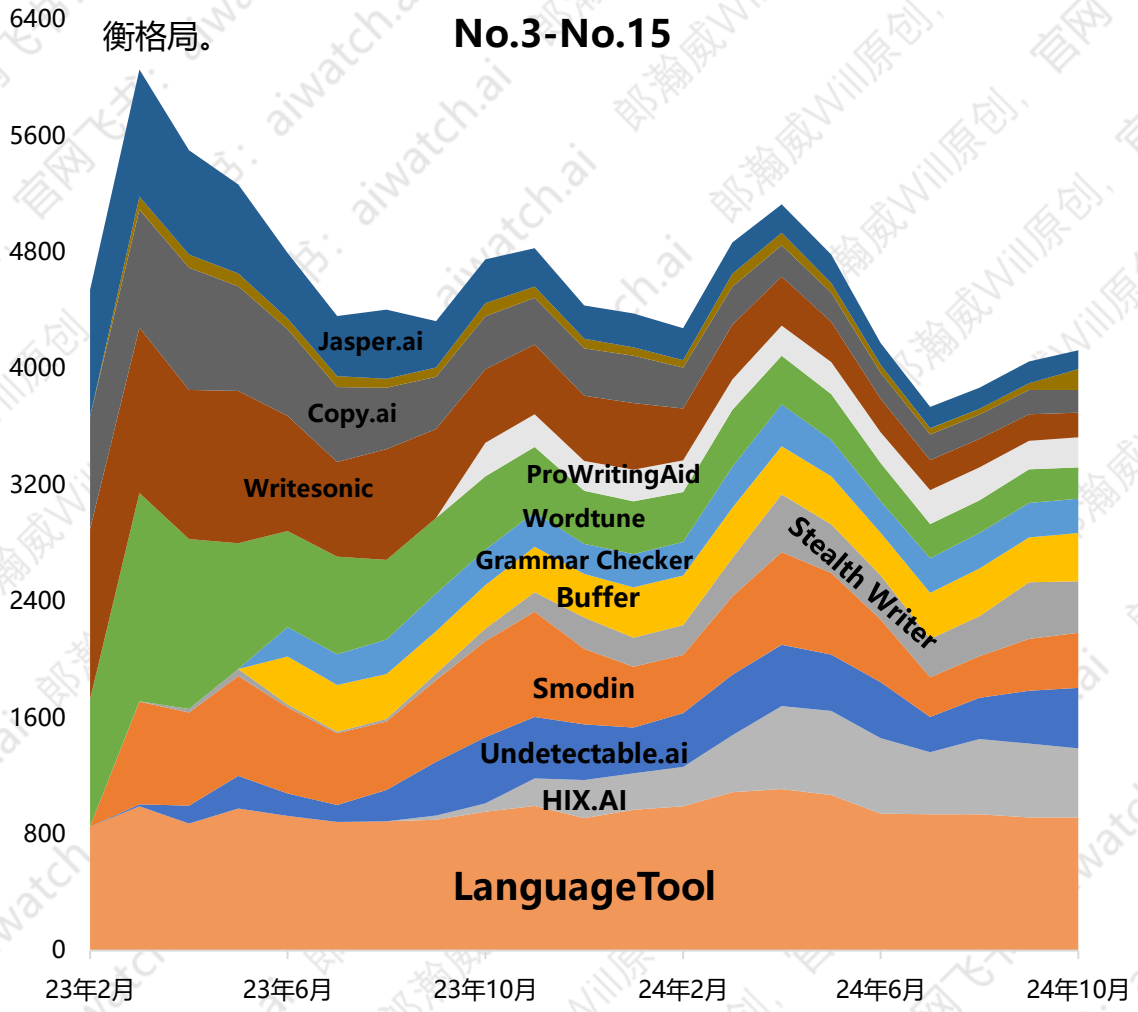
数据来源：similarweb 单位：万visit

通用写作 网页流量趋势 10月总量：1.8亿

- 2024年写作工具赛道整体流量曲线呈波浪式上升，Quillbot和Grammarly两家头部产品稳定领跑，二者占据超过70%市场份额，两家企业占据显著优势。



- No.3-15名产品阵营竞争态势紧张，LanguageTool稳居第三常态化维持近千万访问量，而HIX.AI、Stealth Writer等新晋选手快速崛起，Smodin、Wordtune等传统产品有所下滑，整体呈现新老更替的动态平衡格局。

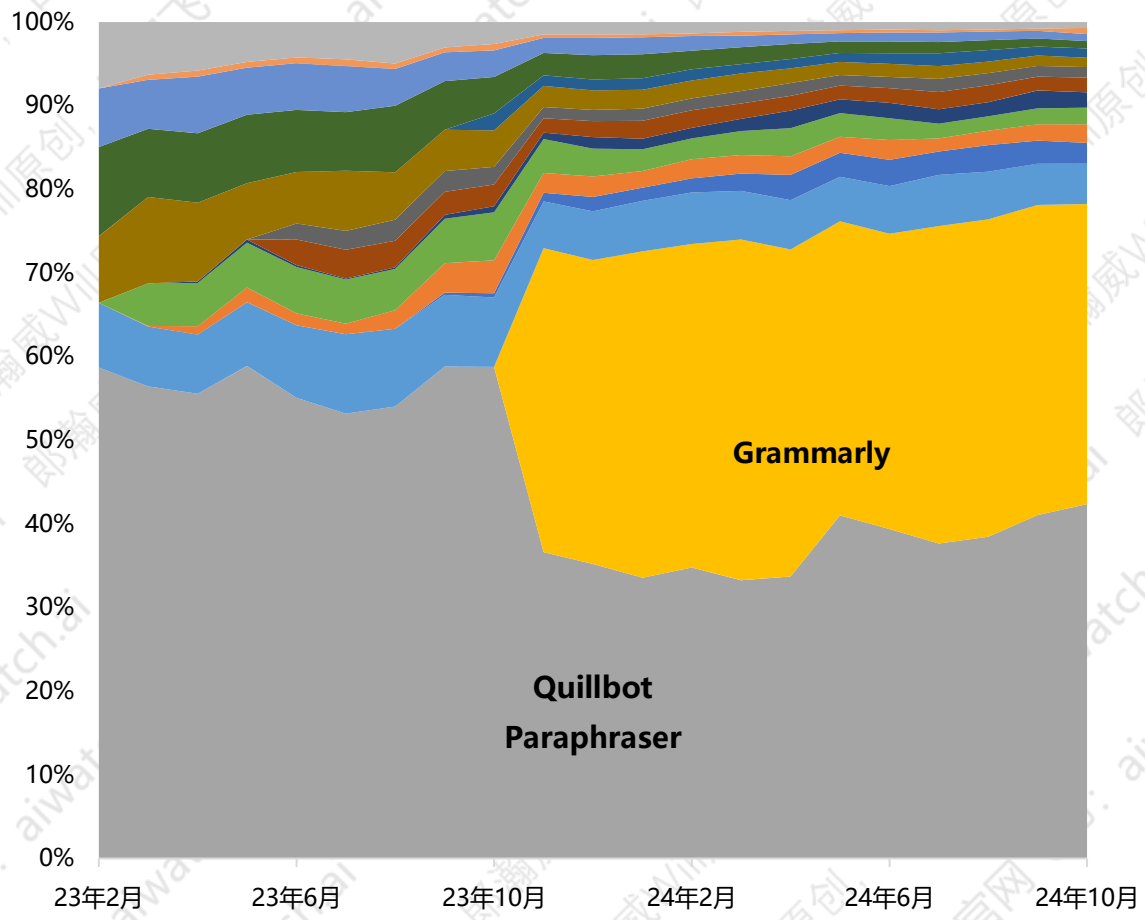


数据来源：similarweb 单位：万visit

通用写作 2023.2~2024.10 网页流量占比

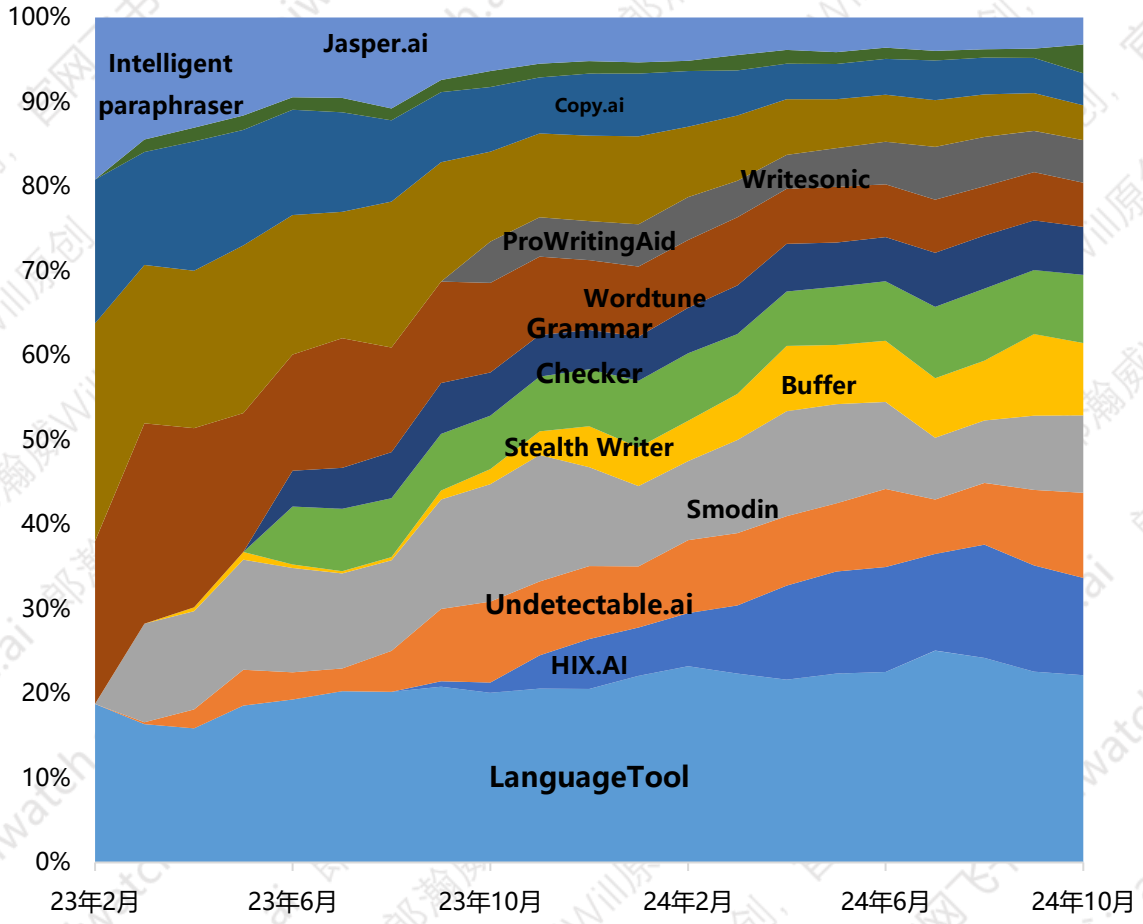
- 从Top15占比图看，Quillbot Paraphraser的市场份额稳定在40%左右。Grammarly的份额在30-35%之间波动，形成双寡头格局。两者合计占据了接近75%的市场份额。

Top15占比



- 在No.3-No.15梯队中，LanguageTool保持15%左右的份额。HIX.AI份额快速提升，其他产品如Smodin、Undetectable.ai等份额相对稳定，各占3-5%不等。

No.3-No.15占比



数据来源：similarweb 单位：万visit

通用写作 国际 | 国产 | 出海 Top10

国际

- Quillbot Paraphraser独占鳌头，月访问量8033万次，优势明显。

序号	产品名称	24年10月(万visit)
1	Quillbot Paraphraser	8,033
2	Grammarly	6,810
3	LanguageTool	915
4	Undetectable.ai	416
5	Smodin	377
6	Stealth Writer	354
7	Buffer	333
8	Grammar Checker	234
9	Wordtune	216
10	ProWritingAid	207

国产

- 彩云位居第一，访问量86万次，搜韵网紧随其后。

序号	产品名称	24年10月(万visit)
1	彩云	86
2	搜韵网	59
3	5118.com	55
4	深言达意	39
5	秘塔写作猫	39
6	橙篇	32
7	易撰	20
8	度加创作工具	16
9	句子控	15
10	新华妙笔AI公文写作	14

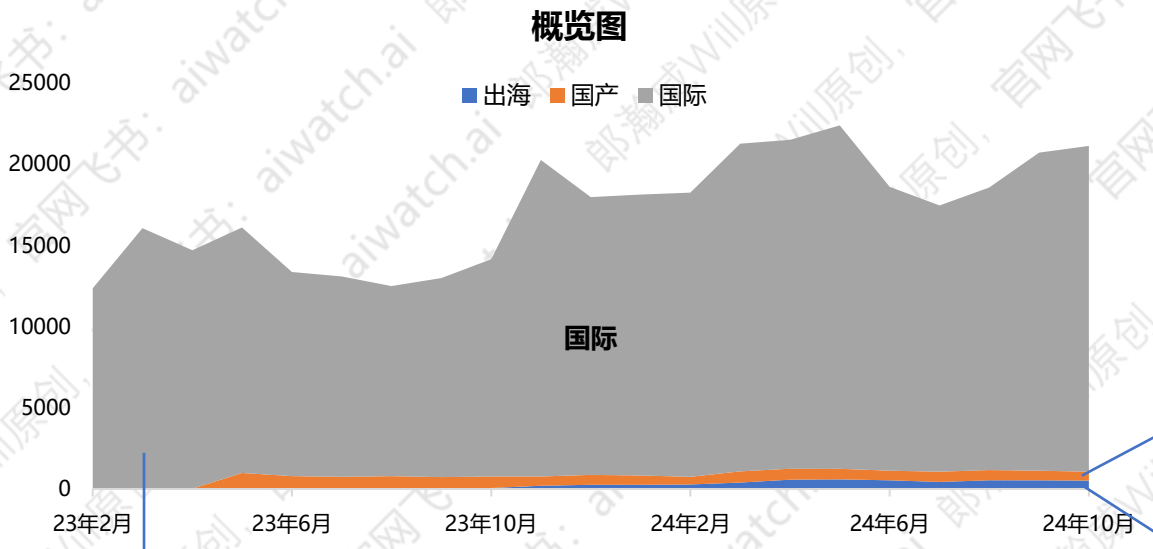
出海

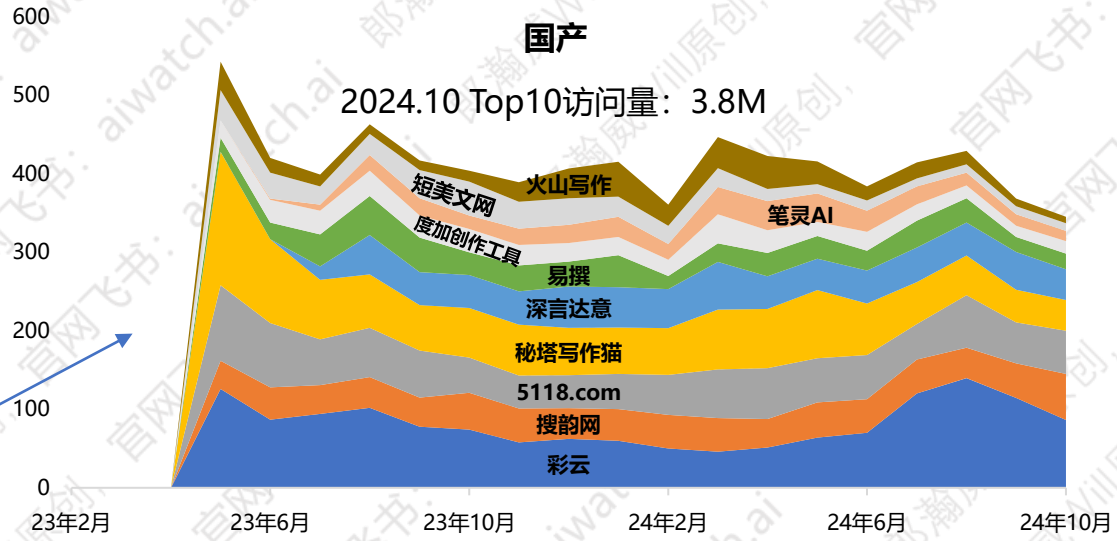
- HIX.AI表现突出，访问量476万次，遥遥领先。

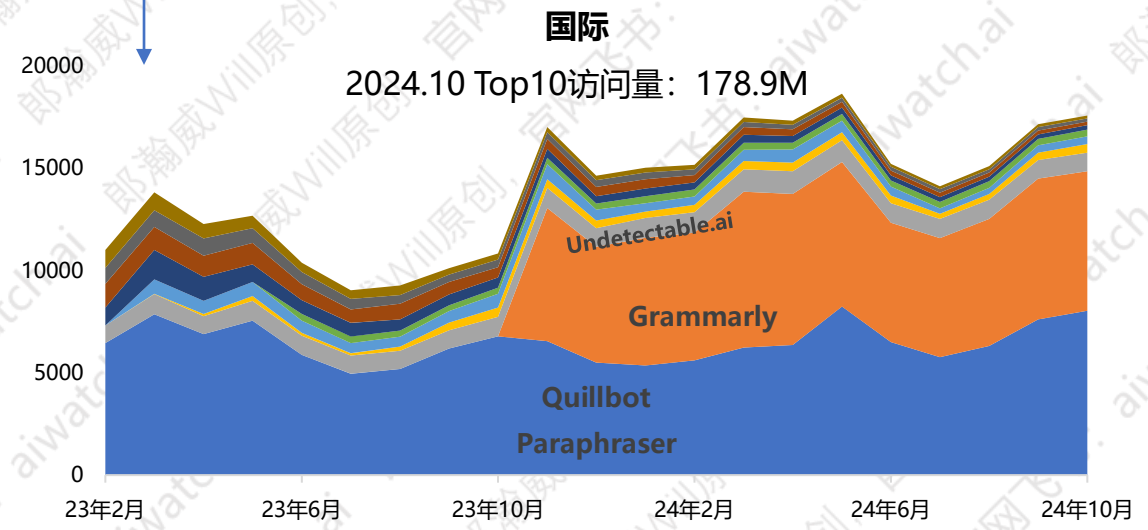
序号	产品名称	24年10月(万visit)
1	HIX.AI	476
2	MidReal	37
3	Siuuu.AI	-
4	HeyFriday	-

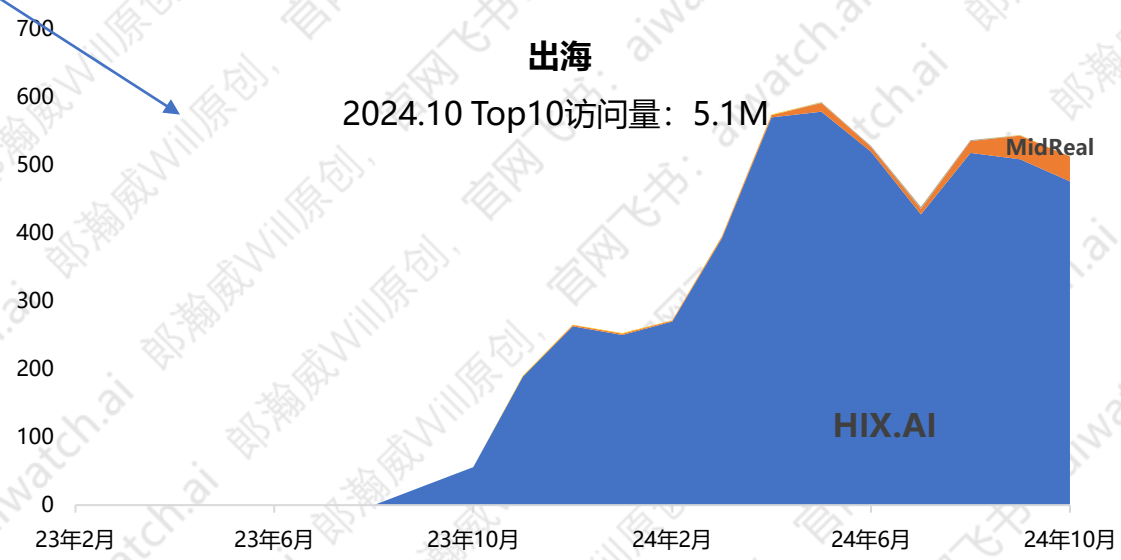
数据来源：similarweb 单位：万visit

通用写作 国际 95% | 国产 3% | 出海 2%



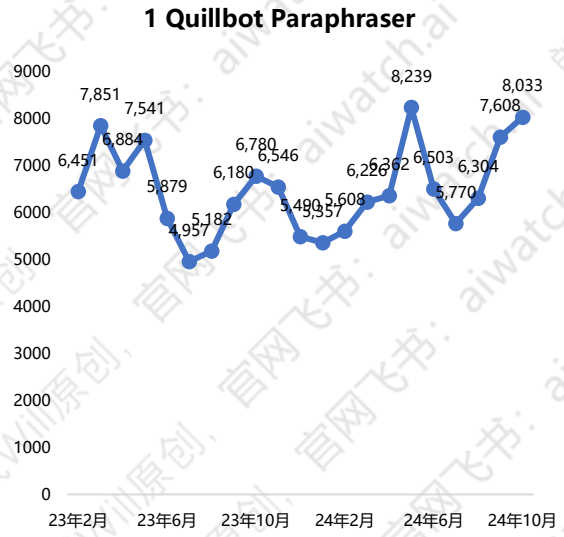


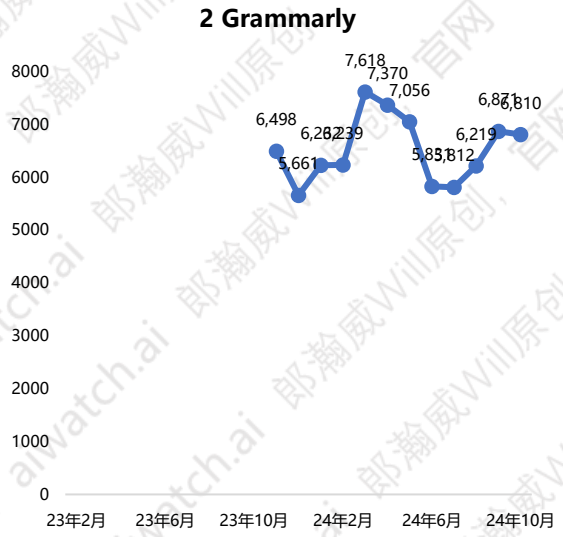


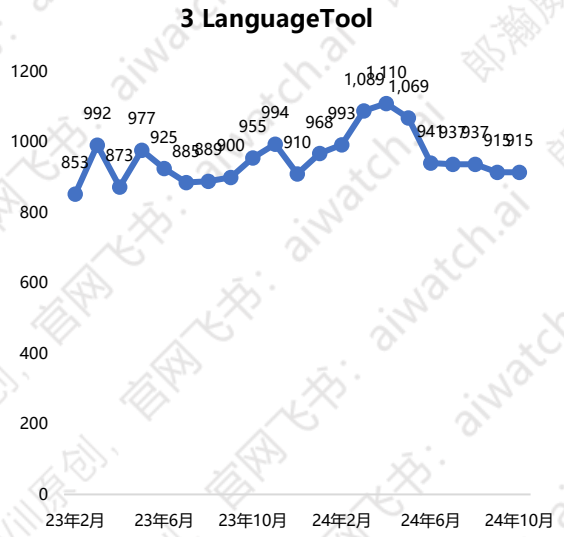


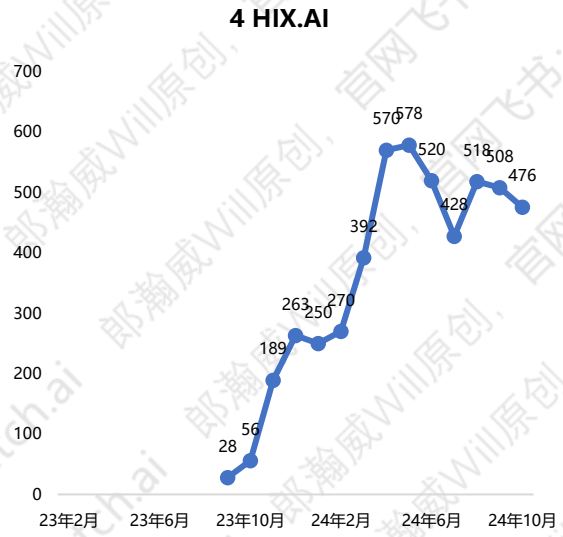
数据来源：similarweb 单位：万visit

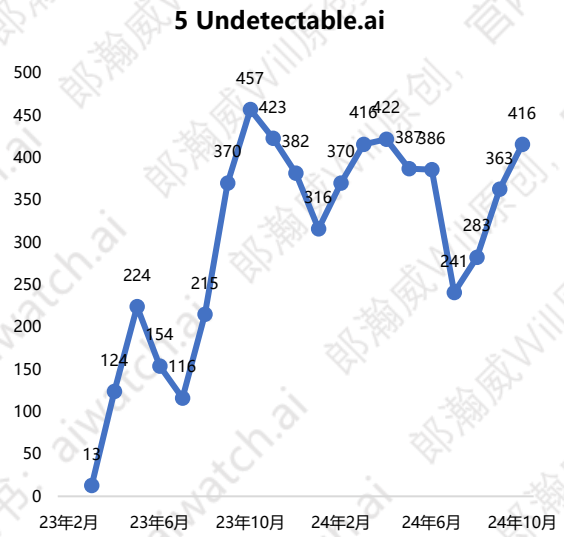
通用写作 No.1-No.8

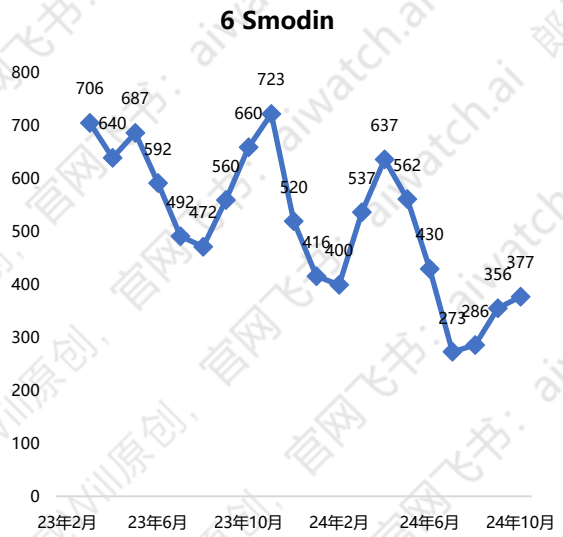


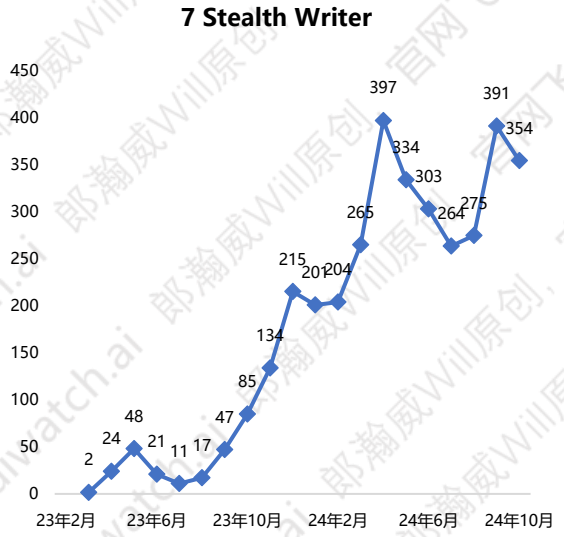


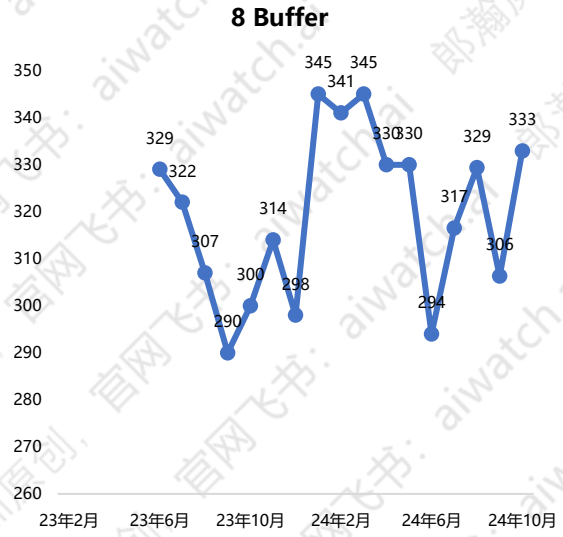






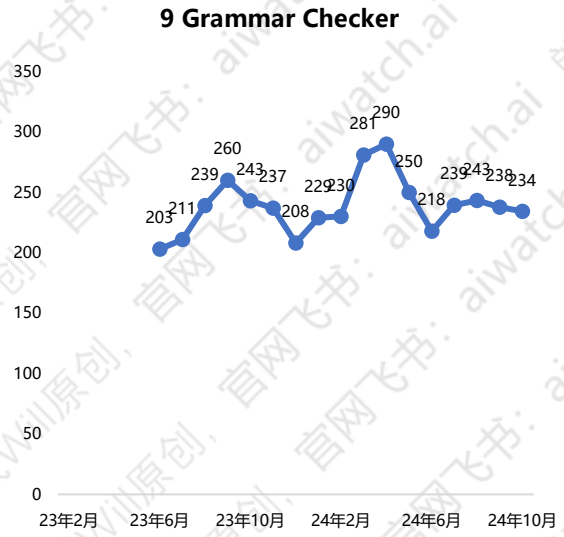


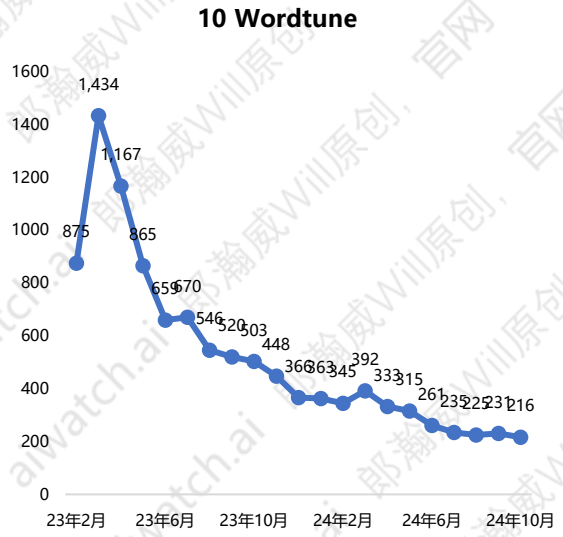


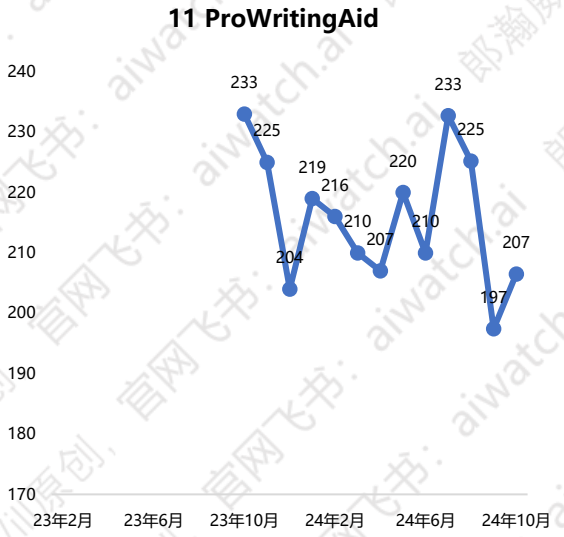


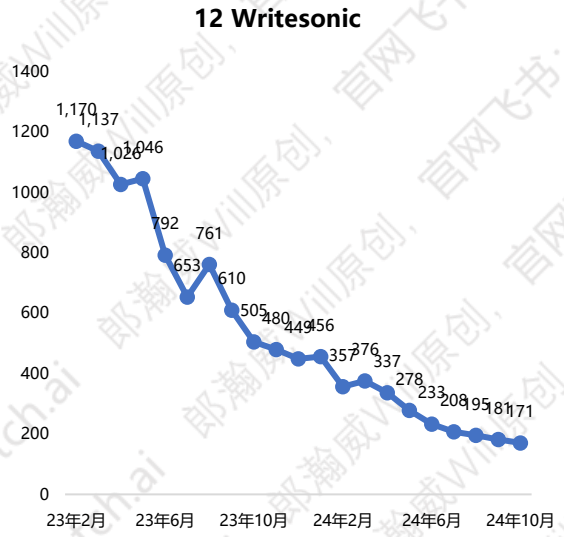
数据来源：similarweb 单位：万visit

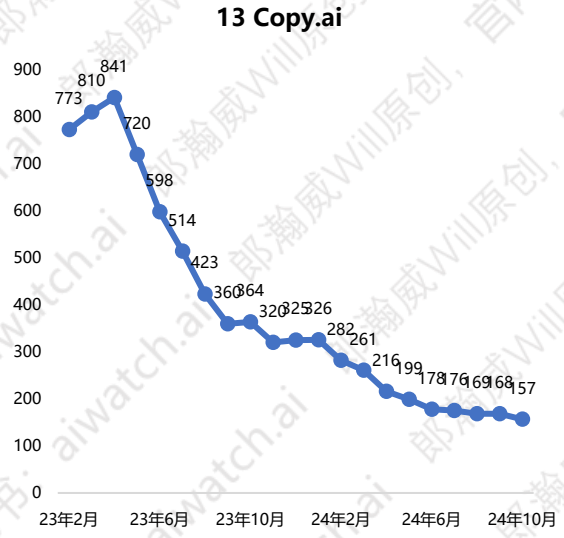
通用写作 No.9-No.16

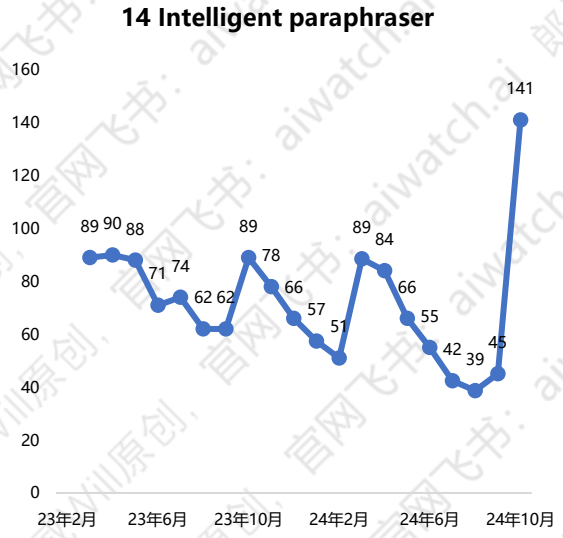


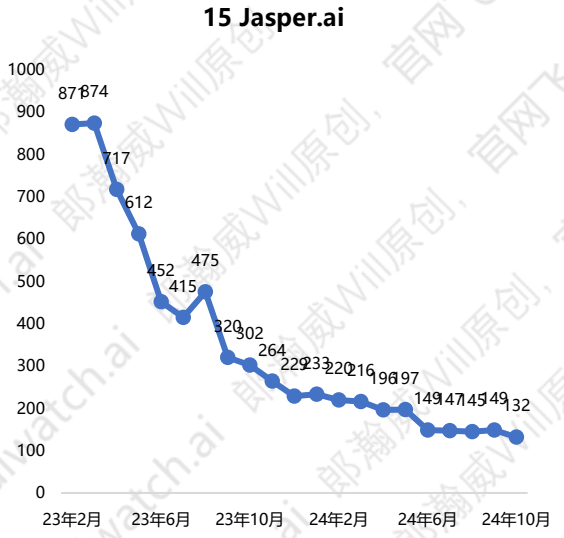


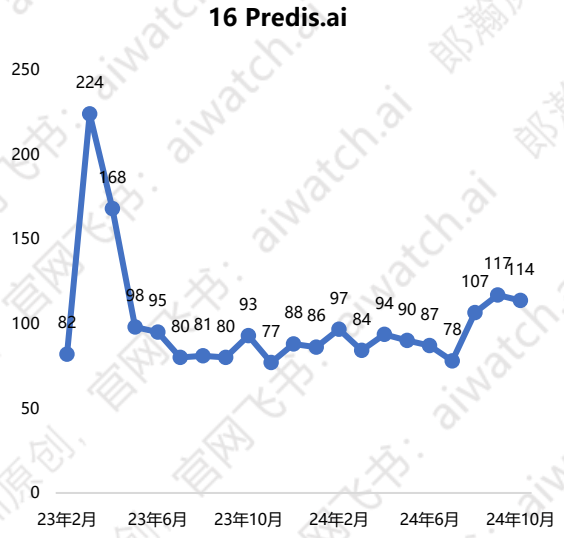








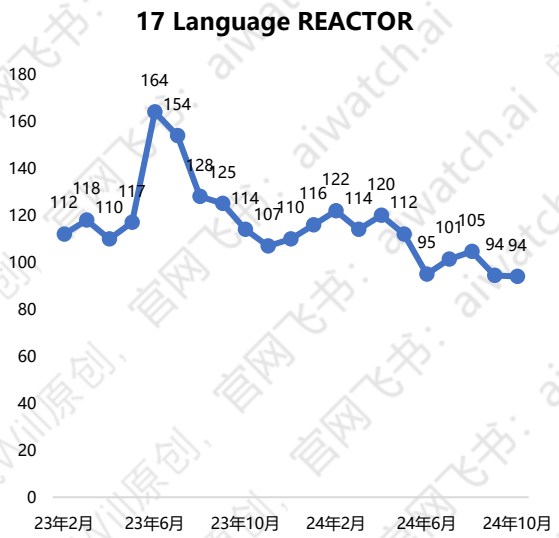


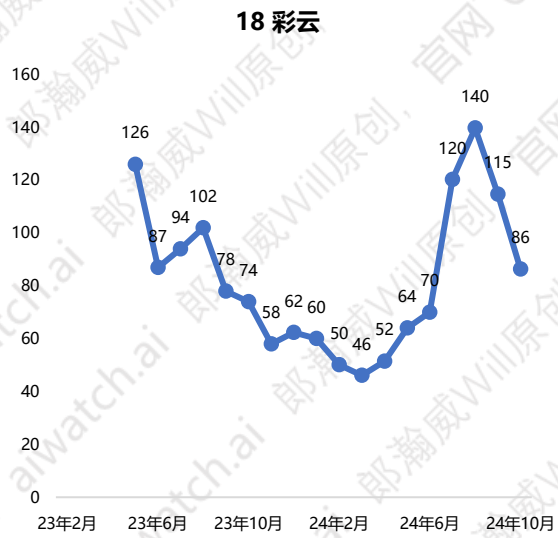


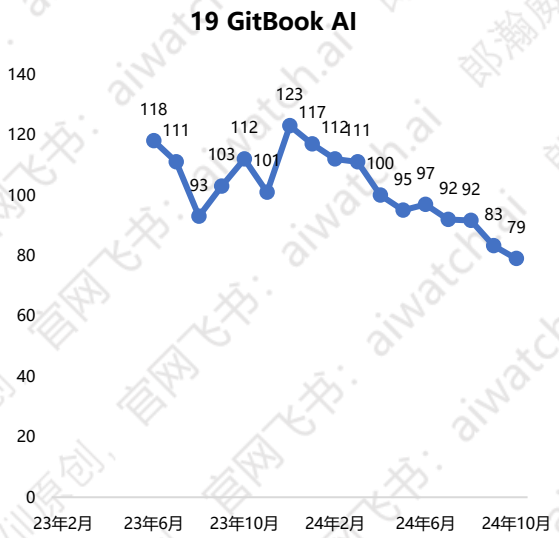
数据来源：similarweb 单位：万visit

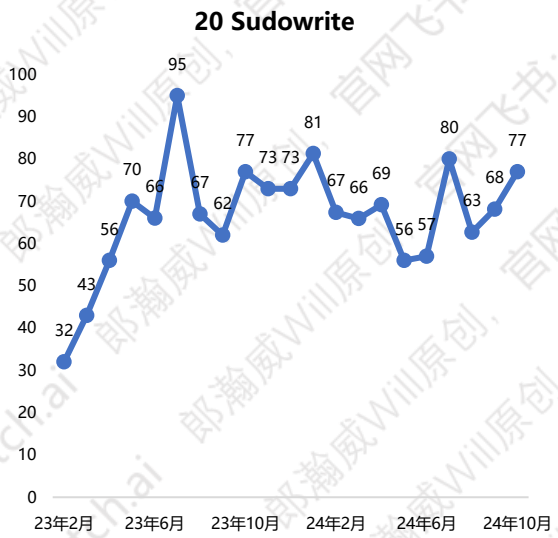
官网飞书：aiwatch.ai 郎瀚威Will原创

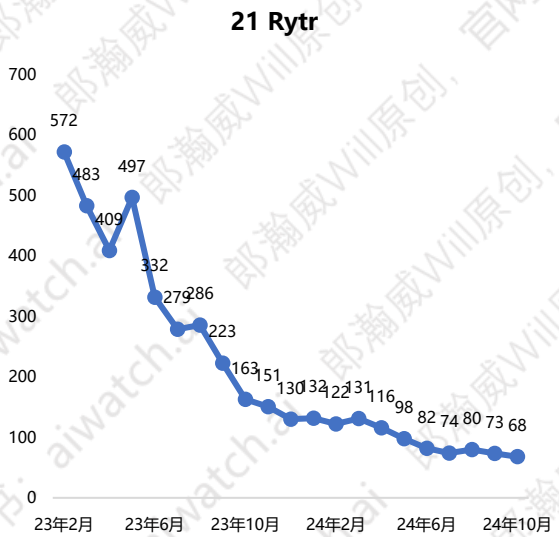
通用写作 No.17-No.24

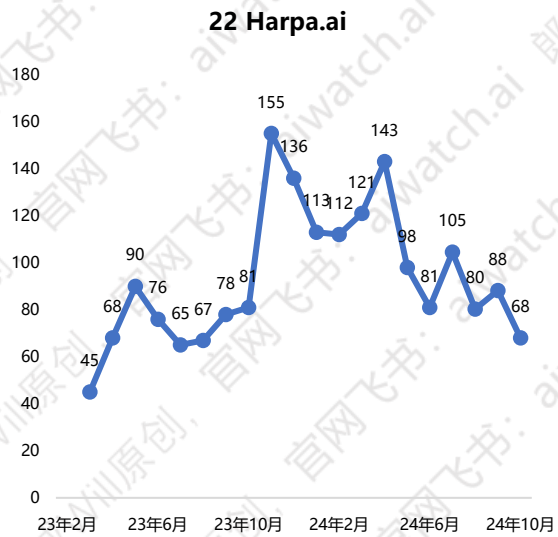


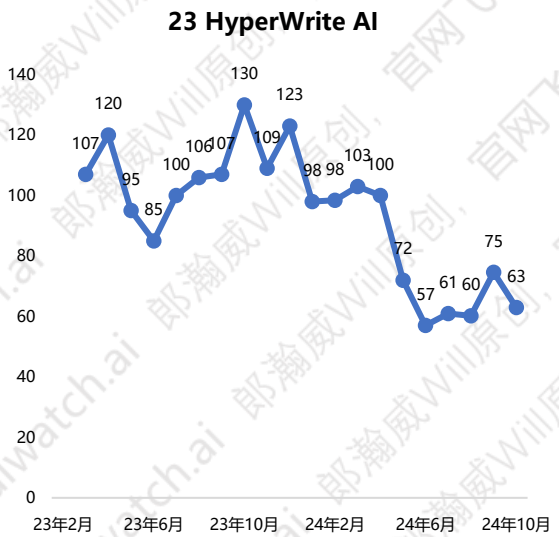


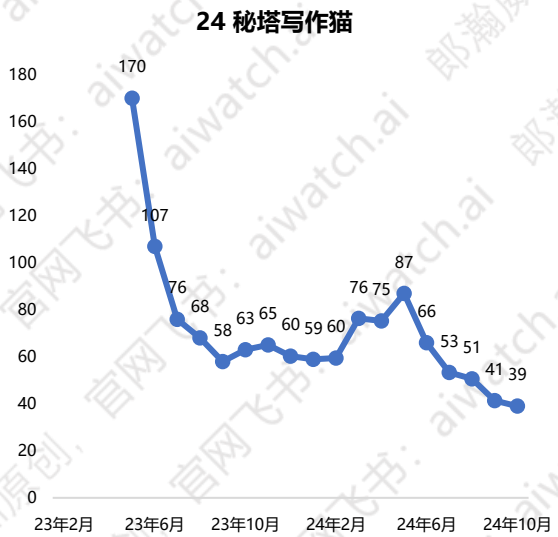






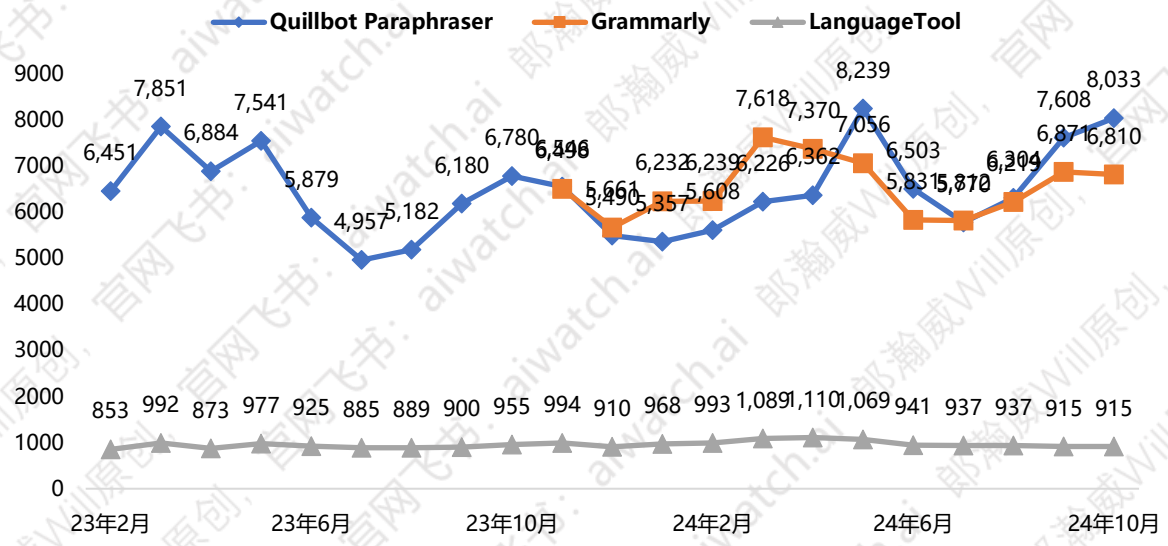


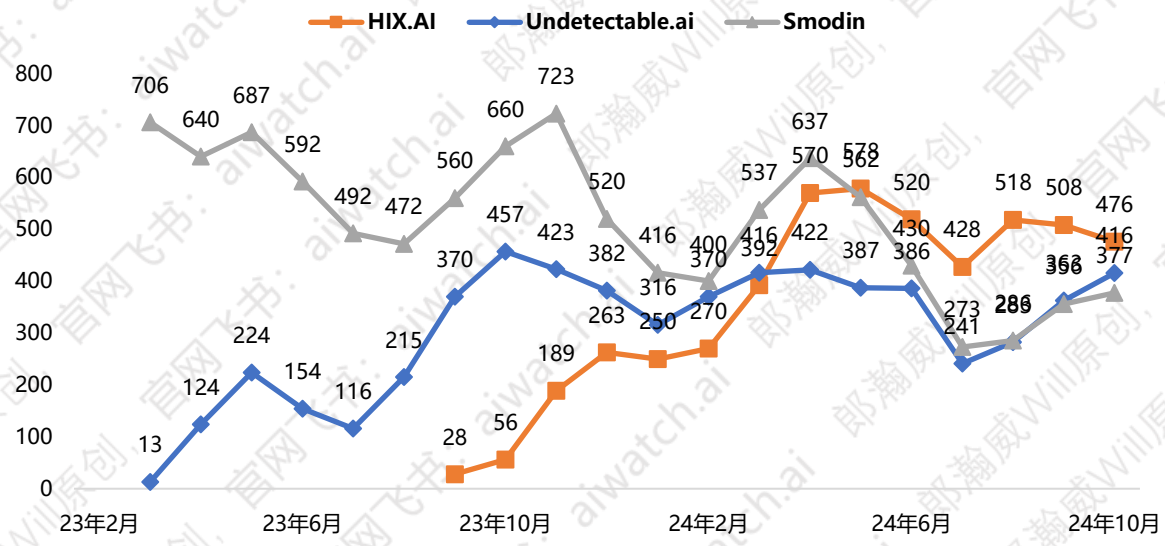


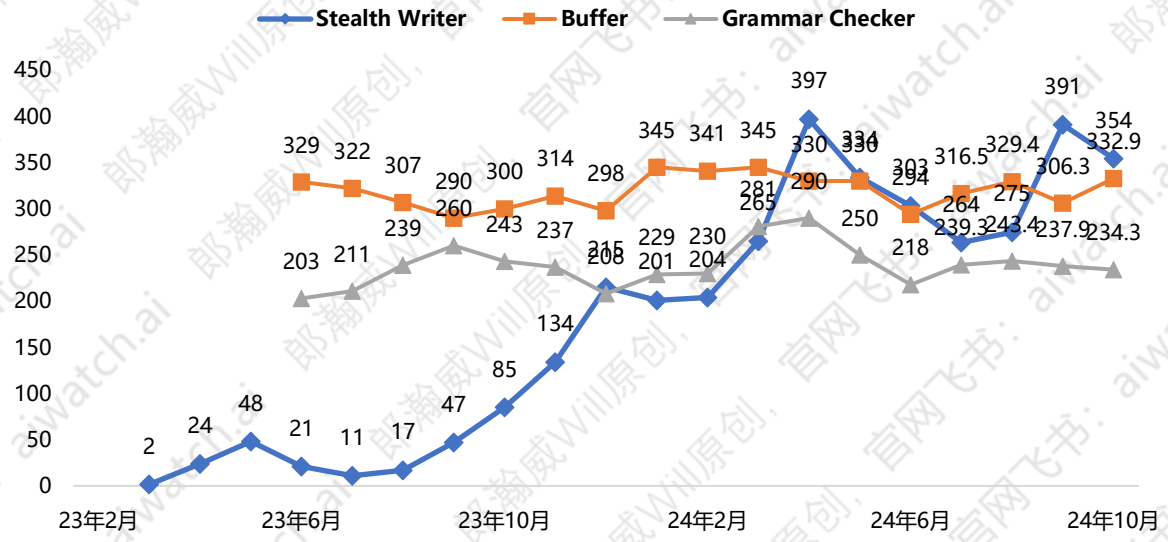


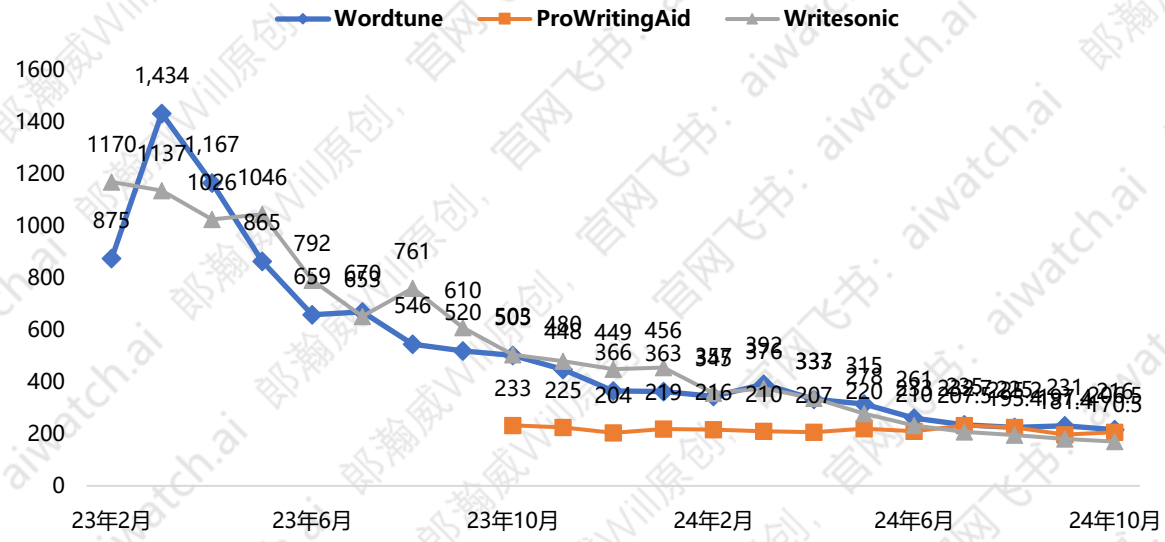
数据来源：similarweb 单位：万visit

通用写作 复合图表









数据来源：similarweb 单位：万visit

图像生成

图像生成

图像生成 - Takeaway

1. 2024年10月图像生成赛道TOP15总访问量达3.1亿次。
2. 行业第一梯队由Freepik、Shutterstock和Leonardo.Ai构成，月访问量分别达1.22亿、0.73亿和0.16亿次，其中Freepik同比增长25%。
3. 网站访问，新兴AI产品表现亮眼，如Krea增长730%、Pornwork增长1004%、Sea Art AI增长173%。
4. 近期融资信息，2023-2024年间有三笔重要融资：Leonardo.Ai的3100万美元A轮、Civitai的510万美元种子轮，以及Ideogram的8000万美元A轮融资。
5. 市场分布，传统图库网站（如Freepik、Shutterstock）和AI图像生成工具（如Leonardo.Ai、Midjourney）形成了互补格局，共同主导市场。
6. 特别观察到部分头部产品如Civitai（-32%）、Midjourney（-34%）和PixAI（-26%）出现访问量下滑，可能预示着行业进入调整期。

数据来源：similarweb 单位：万visit

图像生成 - Top15

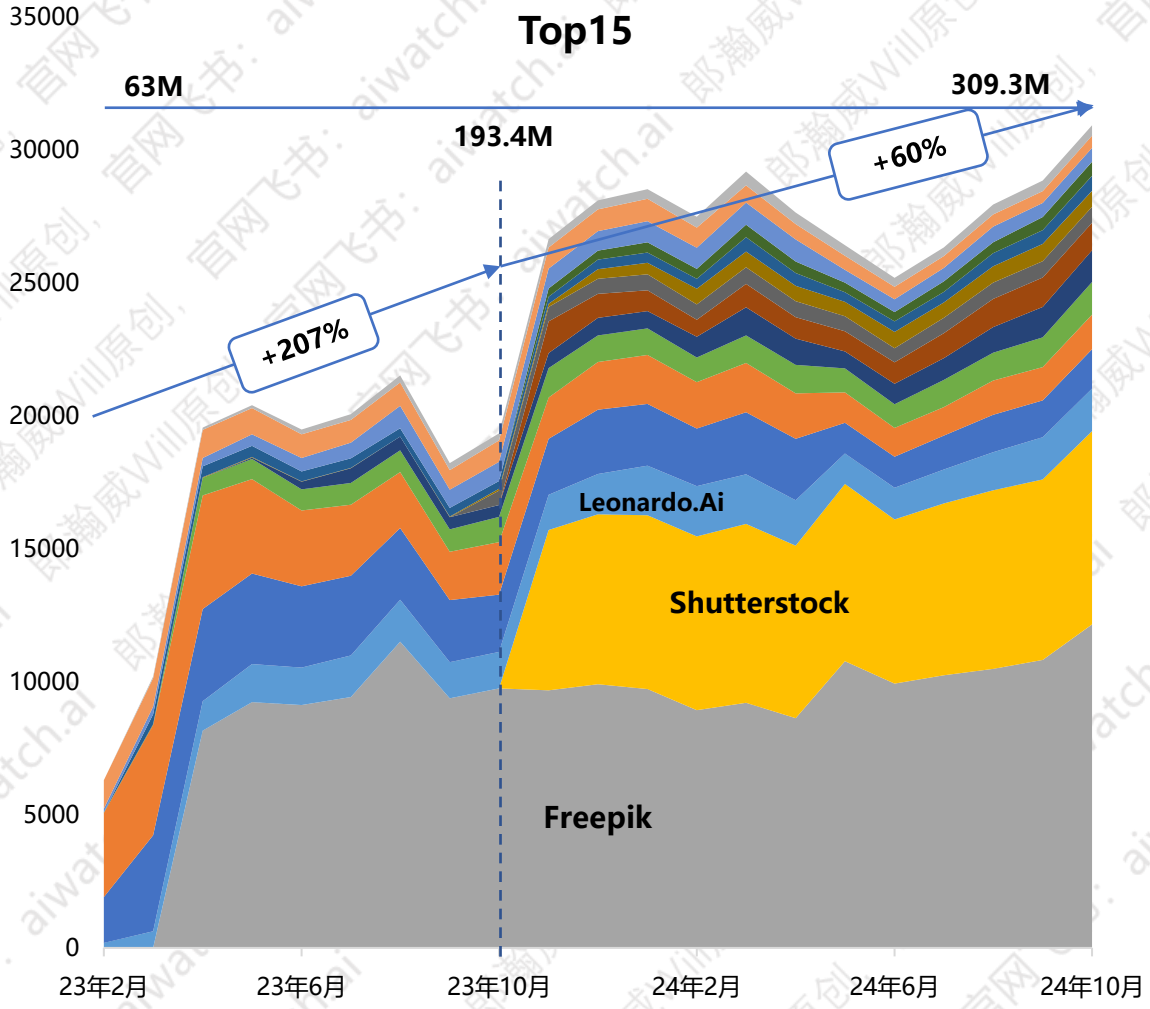
- **TOP15总融资额：1.16亿美元** (Leonardo.Ai (Leonardo.Ai 31M$)+Civitai (Civitai 5.1M$)+Ideogram (Ideogram 80M$)=116.1M$)
- **Top15 总网页流量：3.1亿次visit**

序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	Freepik	9,751	12,160	25%	Freepik	-	-	-	-	India	13%
2	Shutterstock		7,269	-	Shutterstock	-	-	-	-	United States	14%
3	Leonardo.Ai	1,381	1,602	16%	Leonardo.Ai	A轮	2023/12/6	31	20	United States	12%
4	Civitai	2,154	1,475	-32%	Civitai	种子轮	2023/6/28	5.1	-	United States	23%
5	Midjourney	1,968	1,301	-34%	Midjourney	-	-	-	300	United States	21%
6	Picsart AI	955	1,229	29%	Picsart AI	-	-	-	-	United States	21%
7	Sea Art AI	438	1,194	173%	海艺互娱	-	-	-	-	Japan	22%
8	Ideogram		1,033	-	Ideogram	A轮	2024/2/28	80	-	India	14%
9	Media.io	546	599	10%	科技集团股份有限	-	-	-	-	India	14%
10	Krea	72	598	730%	Krea	-	-	-	-	Brazil	12%
11	Openart	290	566	95%	Openart	-	-	-	8	United States	24%
12	Tensor.Art		527	-	Tensor.Art	-	-	-	-	United States	13%
13	PixAI	714	525	-26%	时代传浮	-	-	-	-	Japan	37%
14	AI Face Swap		504	-	AI Face Swap	-	-	-	-	United States	20%
15	Pornwork	44	486	1004%	Pornwork	-	-	-	-	Brazil	21%

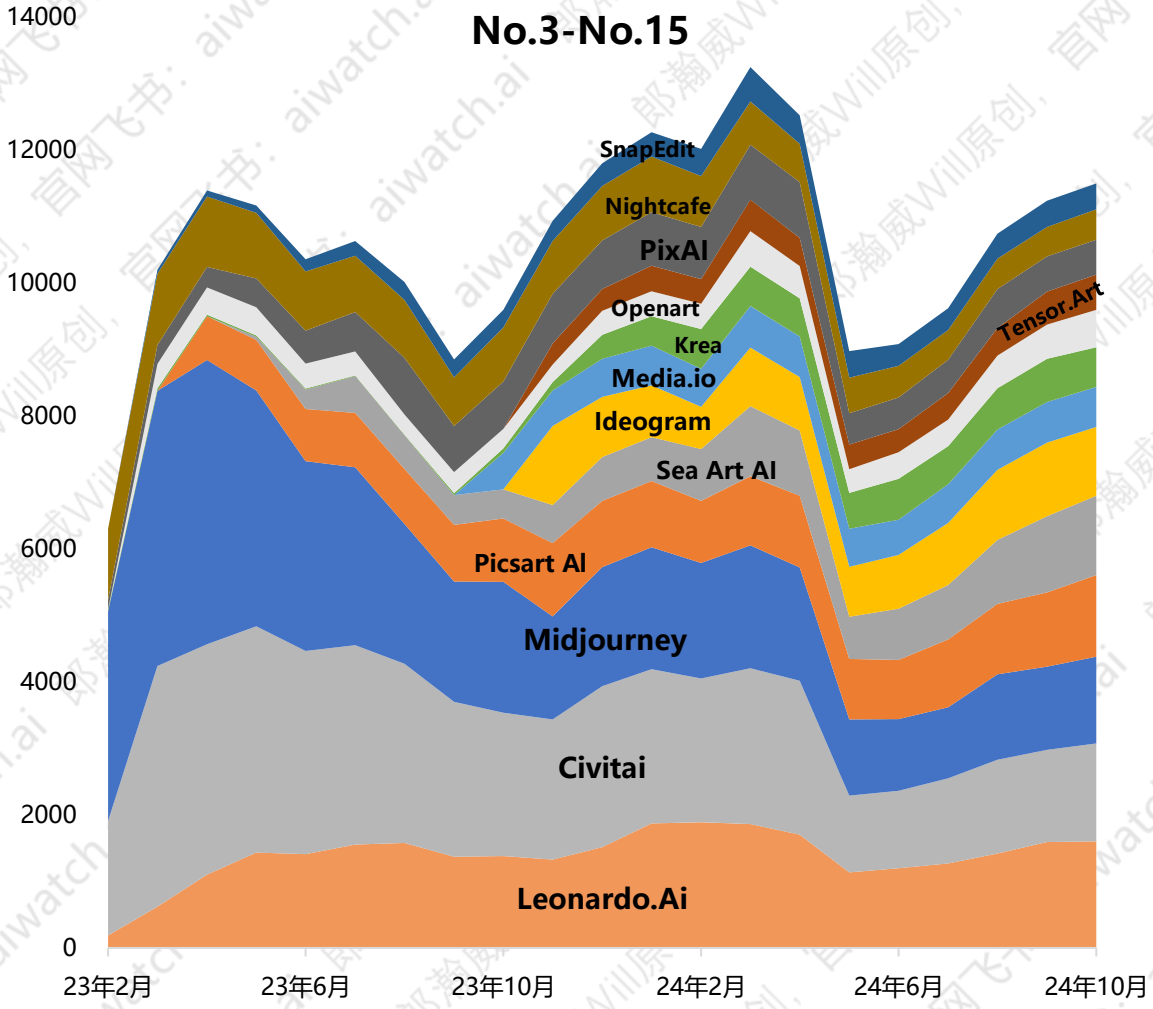
数据来源：similarweb 单位：万visit

图像生成 网页流量趋势 10月总量：3.1亿

- Freepik和Shutterstock形成双巨头格局，分别占据约35%和25%的市场份额，且呈现稳定增长态势，从63M增长至309.3M。两家公司的优势地位持续巩固。



- Leonardo.Ai、Civitai和Midjourney构成稳定的第二梯队，月访问量均在1300-1600万次区间。Sea Art AI、Krea等新兴平台增长迅速，显示出赛道活力。

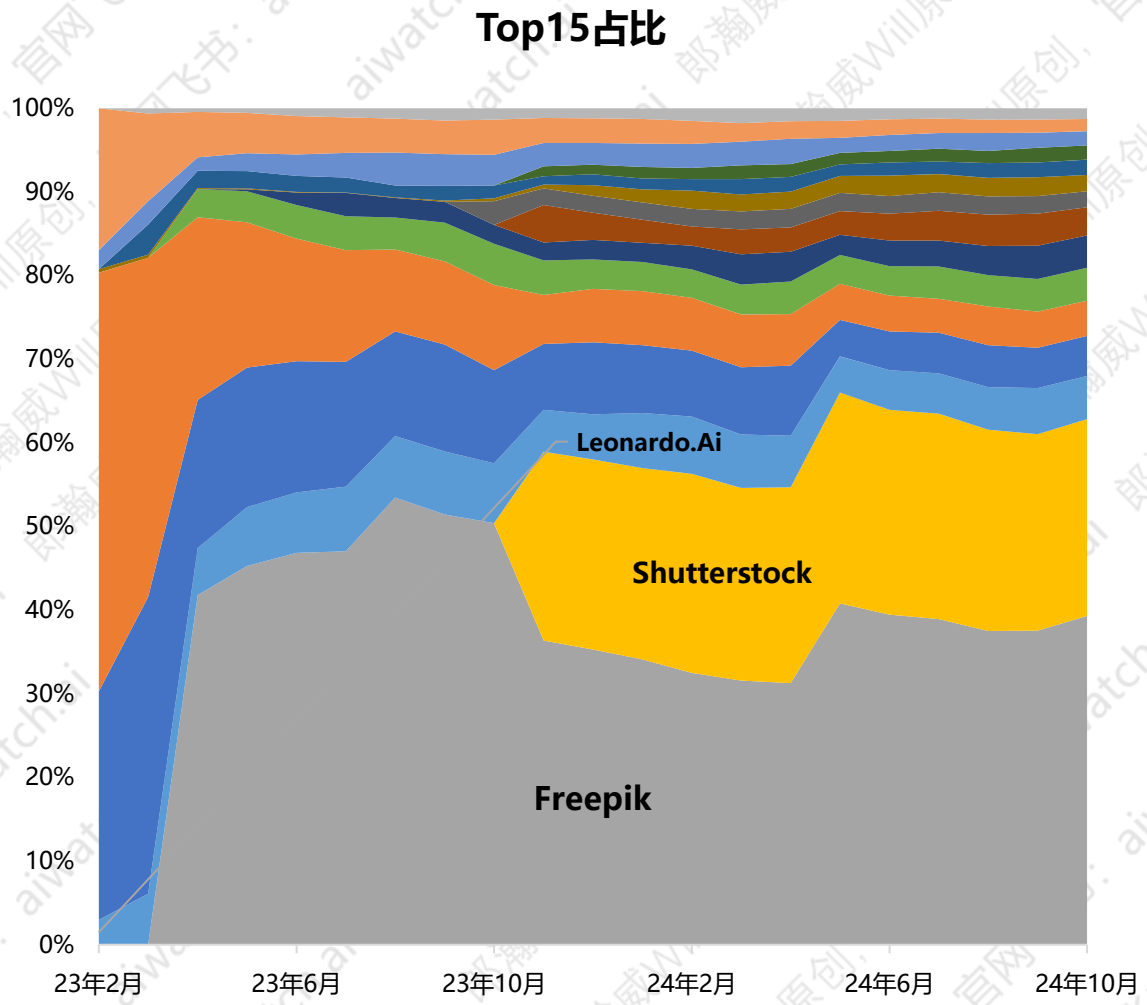


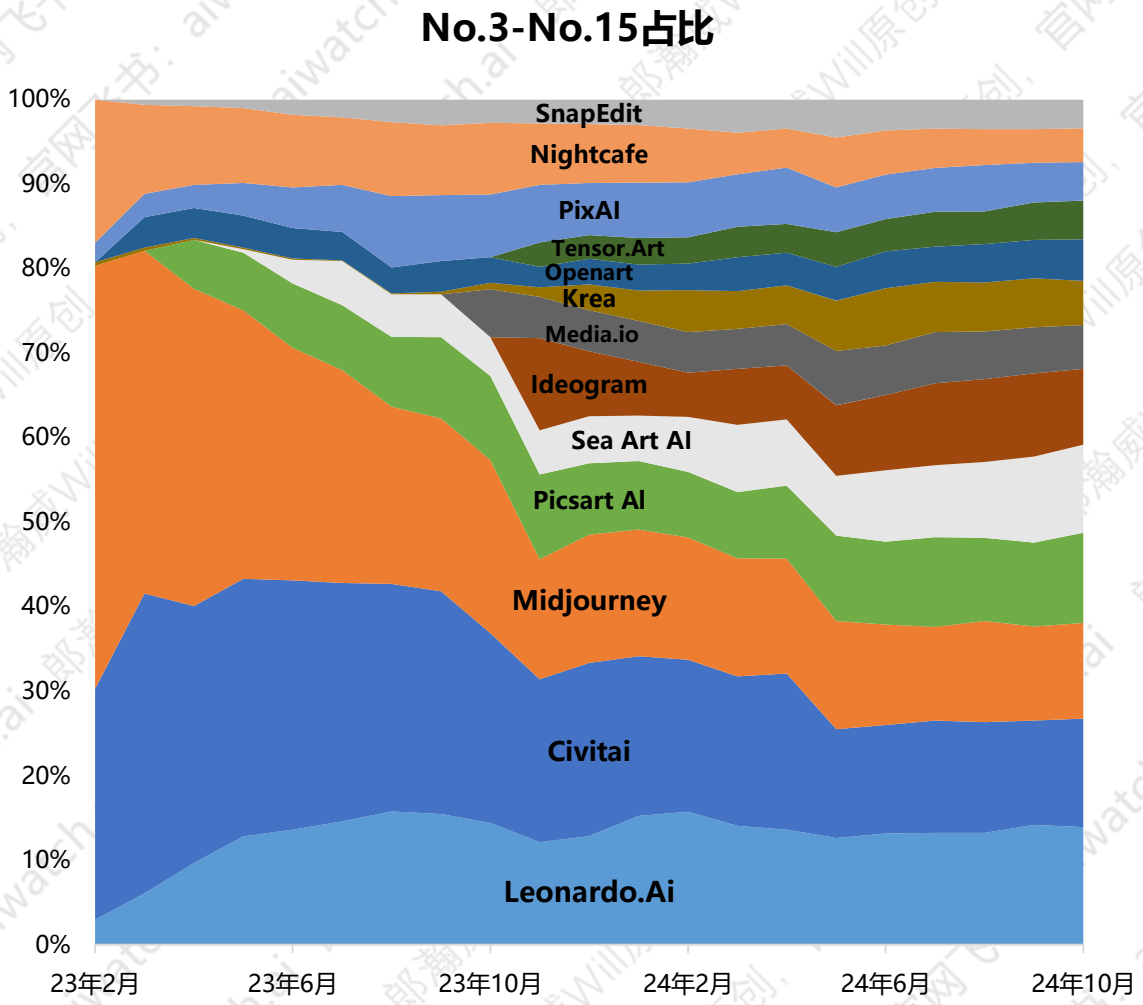
数据来源：similarweb 单位：万visit

图像生成 2023.2~2024.10 网页流量占比

- 从整体占比看，Freepik市场份额稳定在35%以上，Shutterstock份额保持在25%左右，两者合计占据超过60%的市场。而Leonardo.Ai等AI图像生成产品份额相对稳定。

- 在No.3-No.15梯队中，Leonardo.Ai和Civitai的份额相对稳定，各占8-10%。新兴AI工具如Sea Art AI、Ideogram等快速崛起，共同瓜分约30%的市场份额。





数据来源：similarweb 单位：万visit

图像生成 国际 | 国产 | 出海 Top10

国际

- Freepik月访问量12160万次，优势明显。

序号	产品名称	24年10月 (万visit)
1	Freepik	12,160
2	Shutterstock	7,269
3	Leonardo.Ai	1,602
4	Civitai	1,475
5	Midjourney	1,301
6	Picsart AI	1,229
7	Ideogram	1,033
8	Krea	598
9	Tensor.Art	527
10	AI Face Swap	504

国产

- Liblib.art访问量201万次，位居第一。

序号	产品名称	24年10月 (万visit)
1	Liblib.art	201
2	捏咔	151
3	标小智LOGO生成	54
4	我图网	47
5	文心一格	34
6	昇腾社区 hiascend	33
7	TusiArt	28
8	海艺AI	26
9	阿里堆友AI反应堆	22
10	神采PromeAI	22

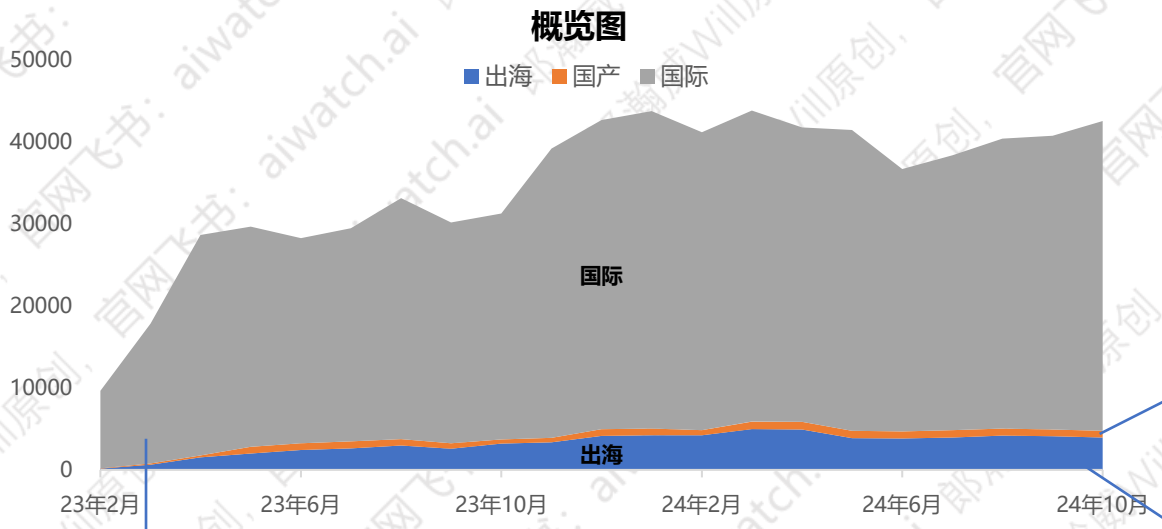
出海

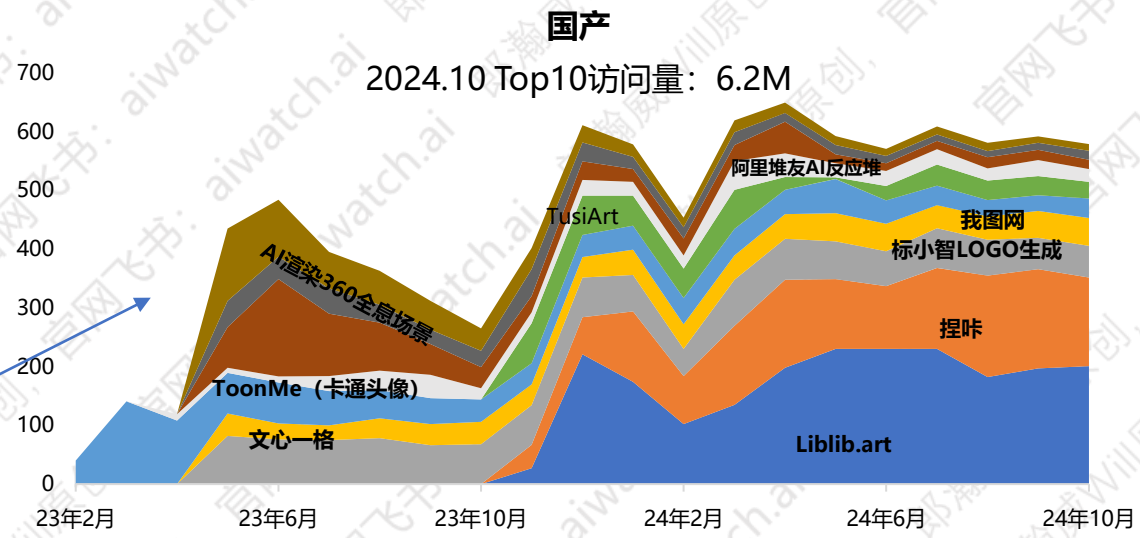
- Sea Art AI表现突出，访问量1194万次。

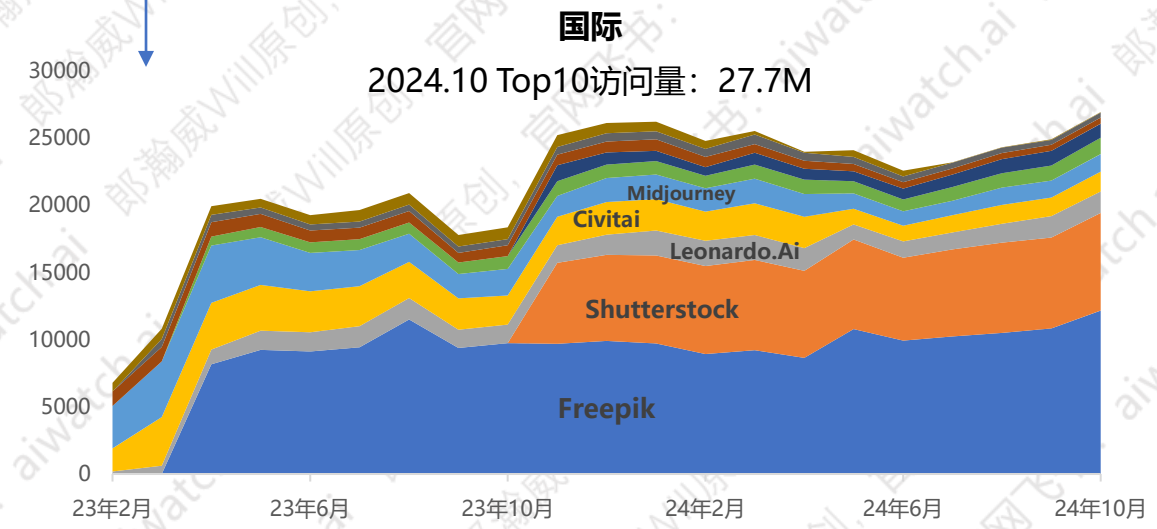
序号	产品名称	24年10月 (万visit)
1	Sea Art AI	1,194
2	Media.io	599
3	Openart	566
4	PixAI	525
5	Yodayo	273
6	SDweb	207
7	A1.art	191
8	Prome AI （cutout）	189
9	Shakker	151
10	SDXL Turbo Playground	51

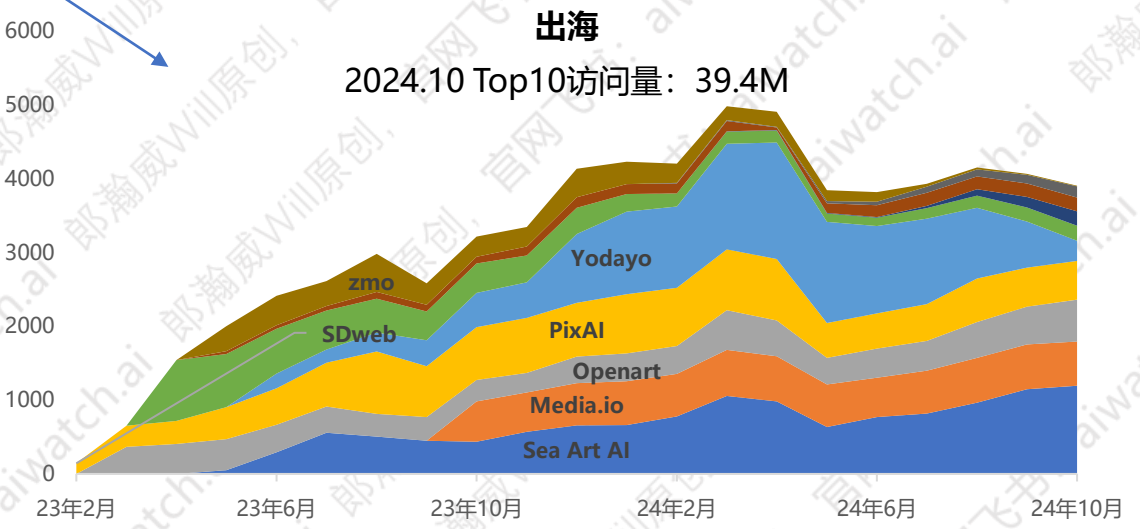
数据来源：similarweb 单位：万visit

图像生成 国际 89% | 国产 2% | 出海 9%





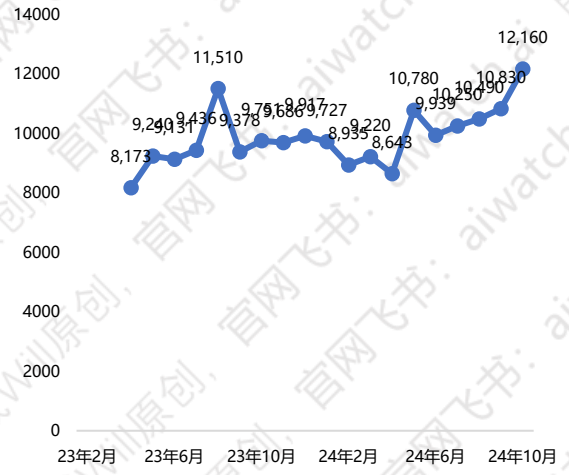




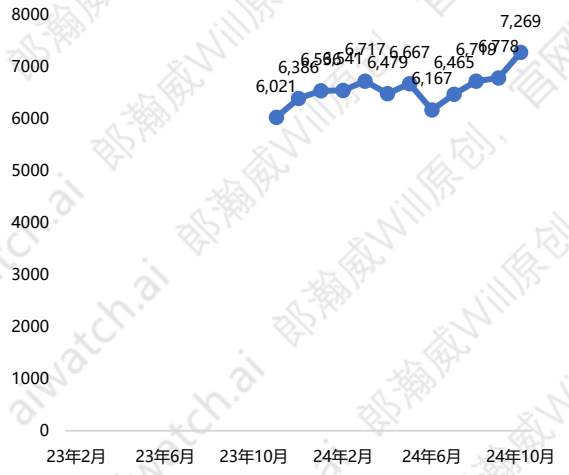
数据来源：similarweb 单位：万visit

图像生成 No.1-No.8

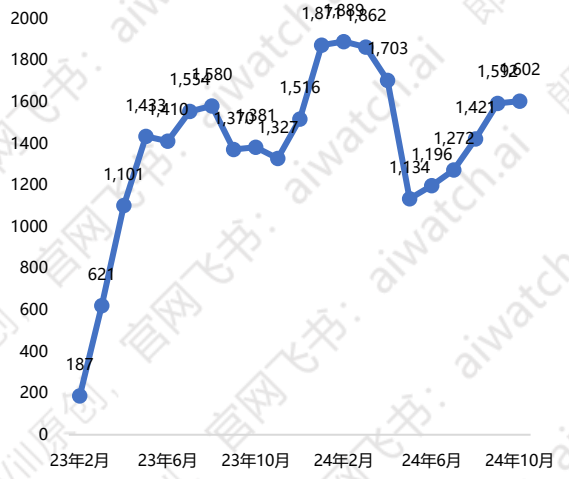
1 Freepik



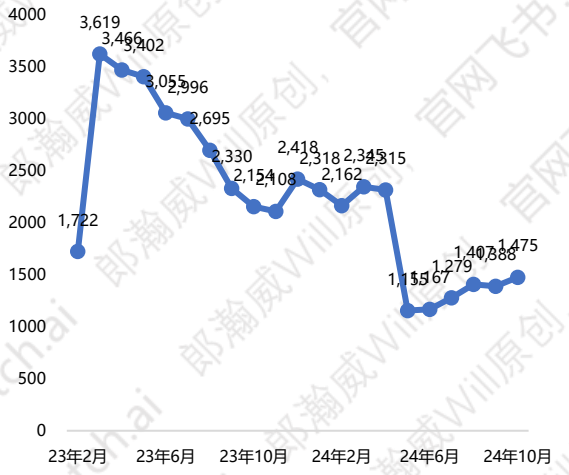
2 Shutterstock



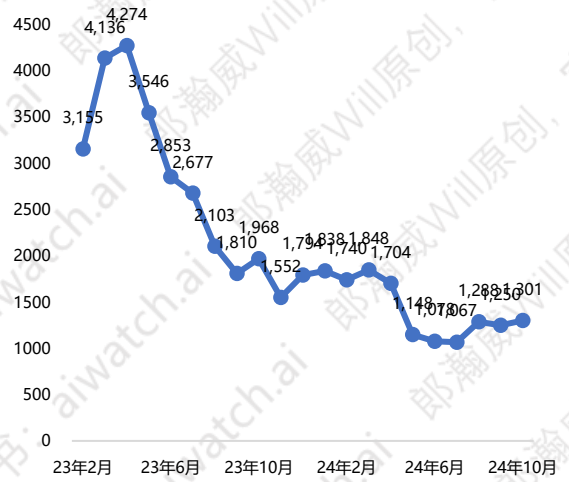
3 Leonardo.Ai



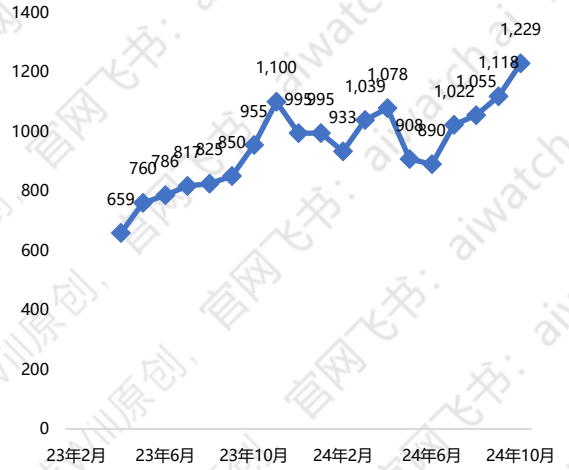
4 Civitai



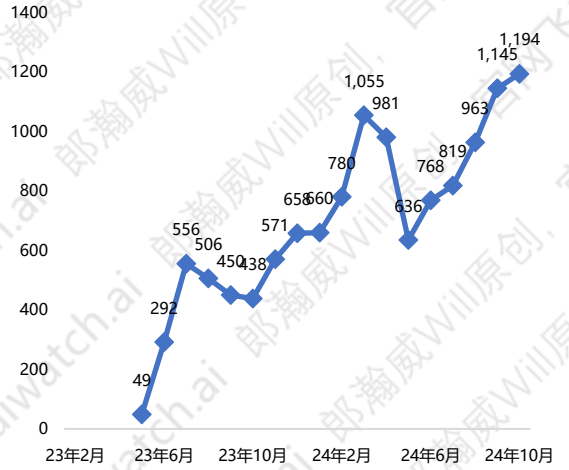
5 Midjourney



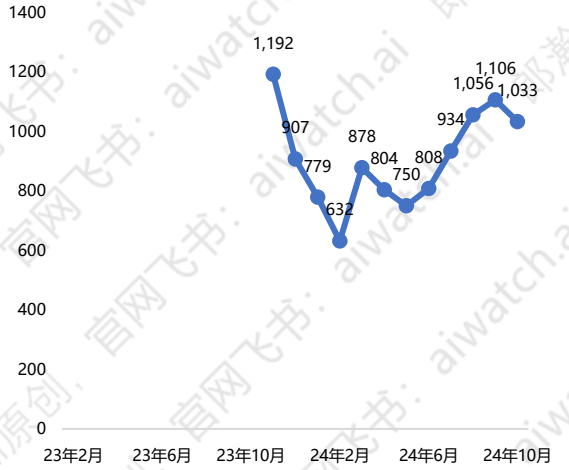
6 Picsart AI



7 Sea Art AI



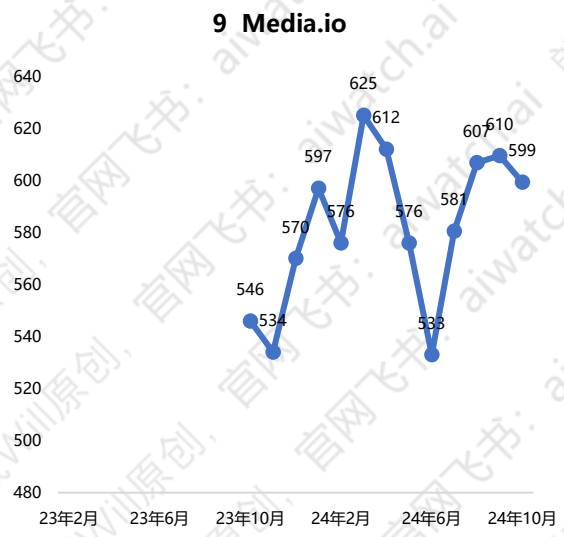
8 Ideogram

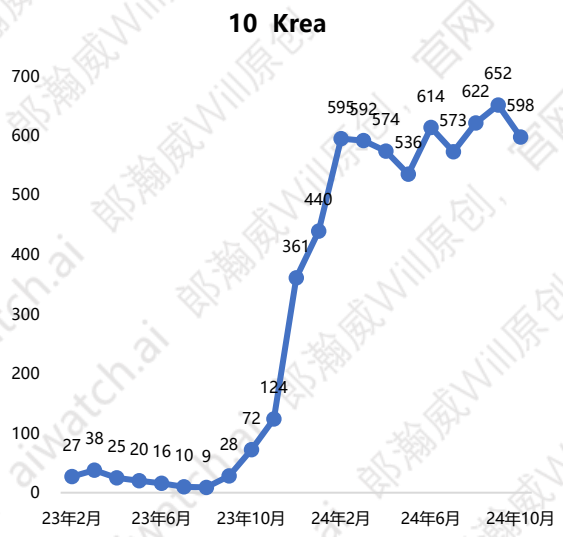


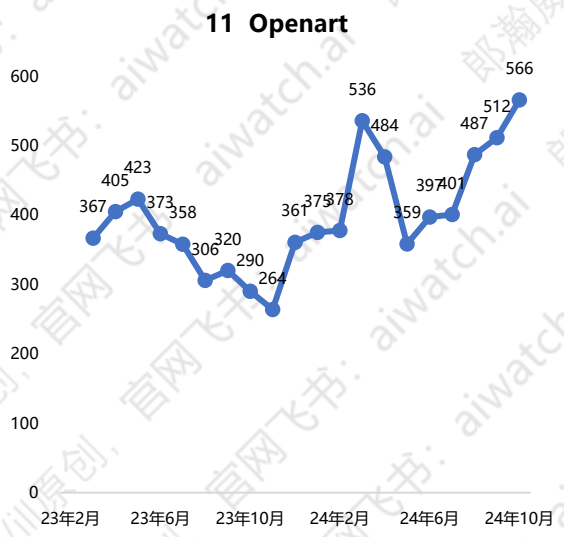
数据来源：similarweb 单位：万visit

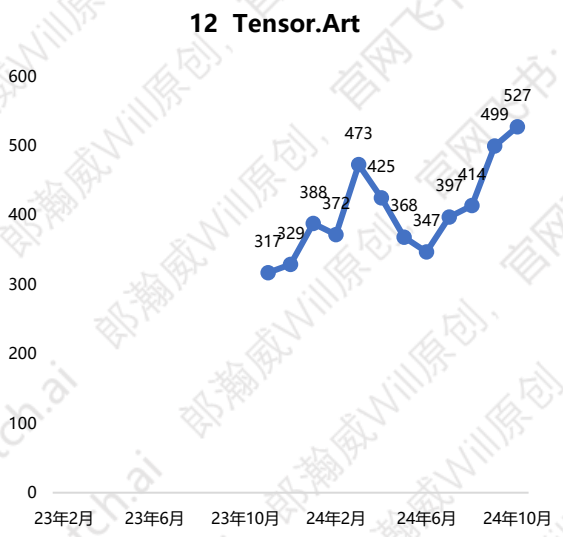
郎瀚威Will原创，官网飞书：aiwatch.ai

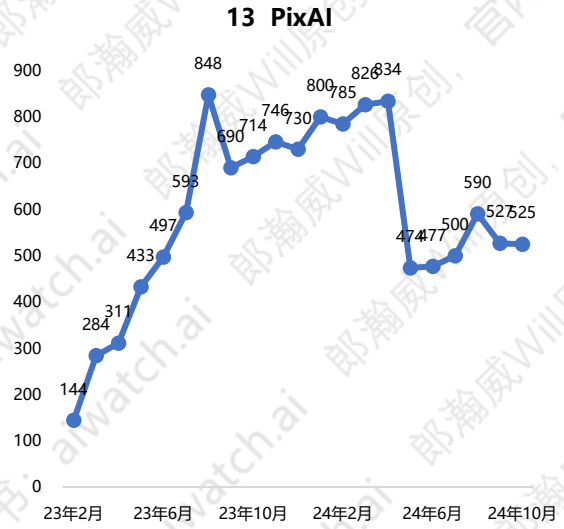
图像生成 No.9-No.16

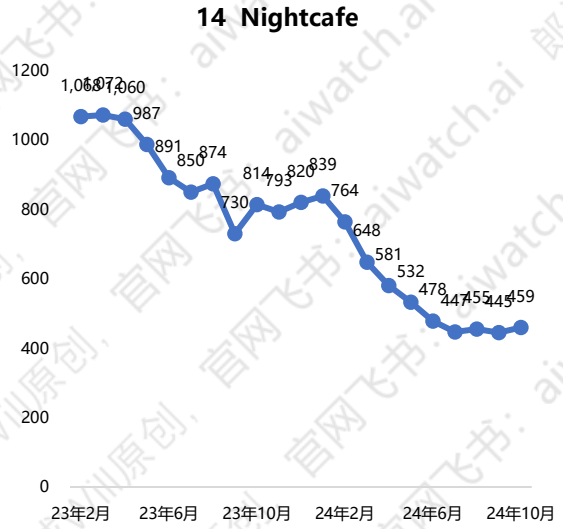


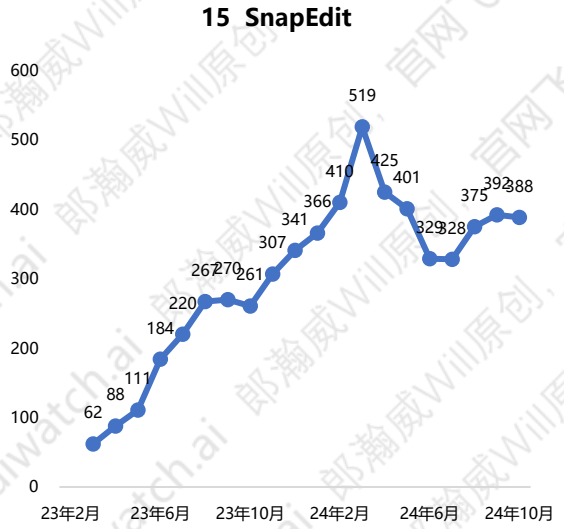


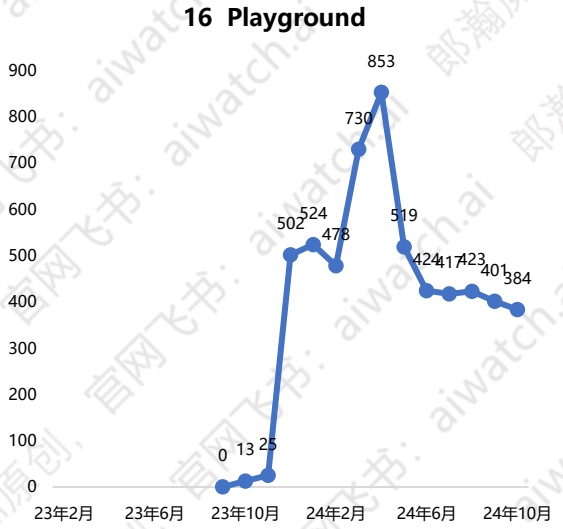






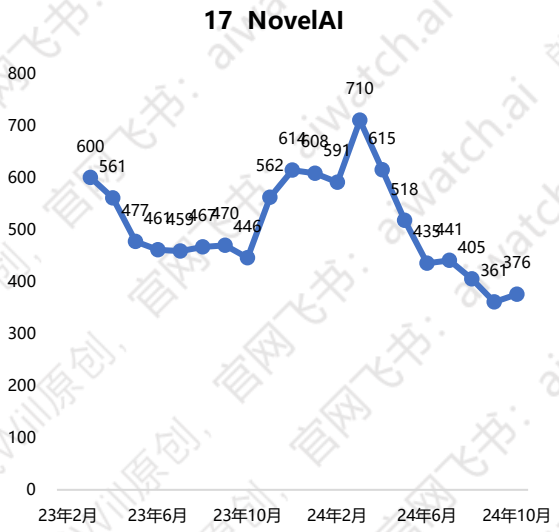


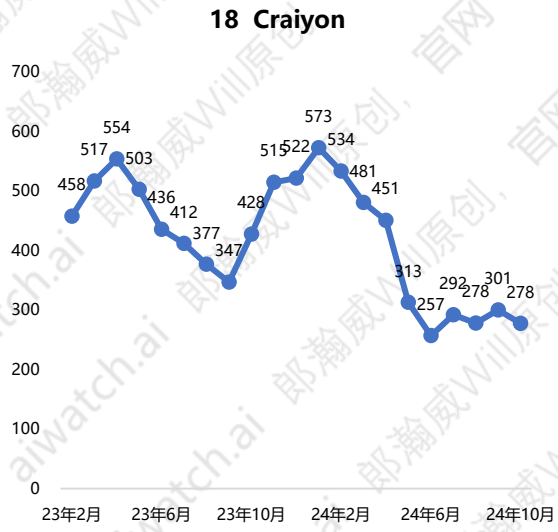


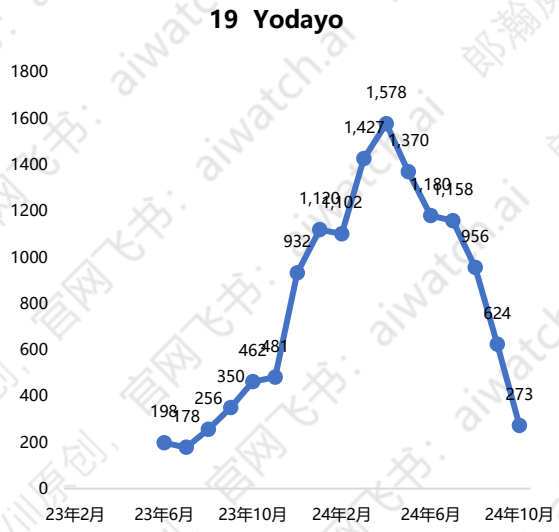


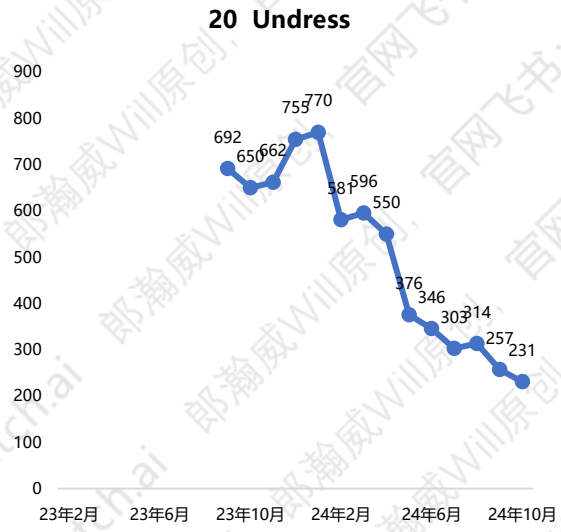
数据来源：similarweb 单位：万visit

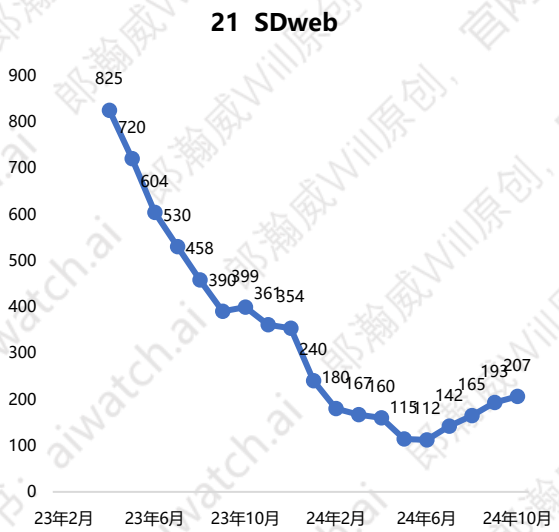
图像生成 No.17-No.24

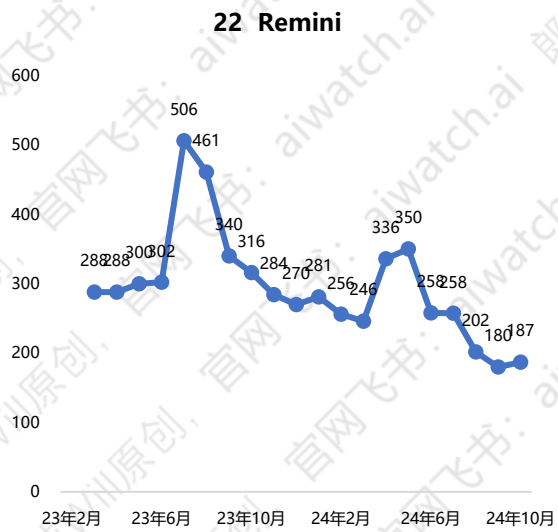


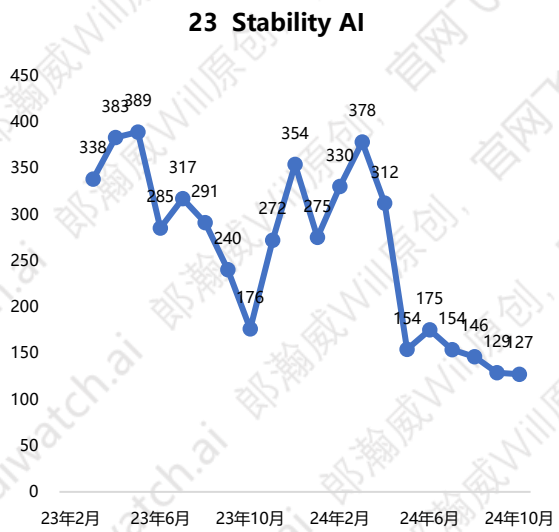


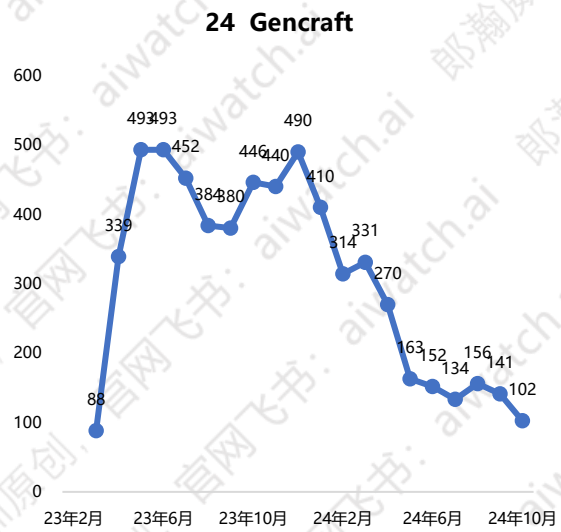






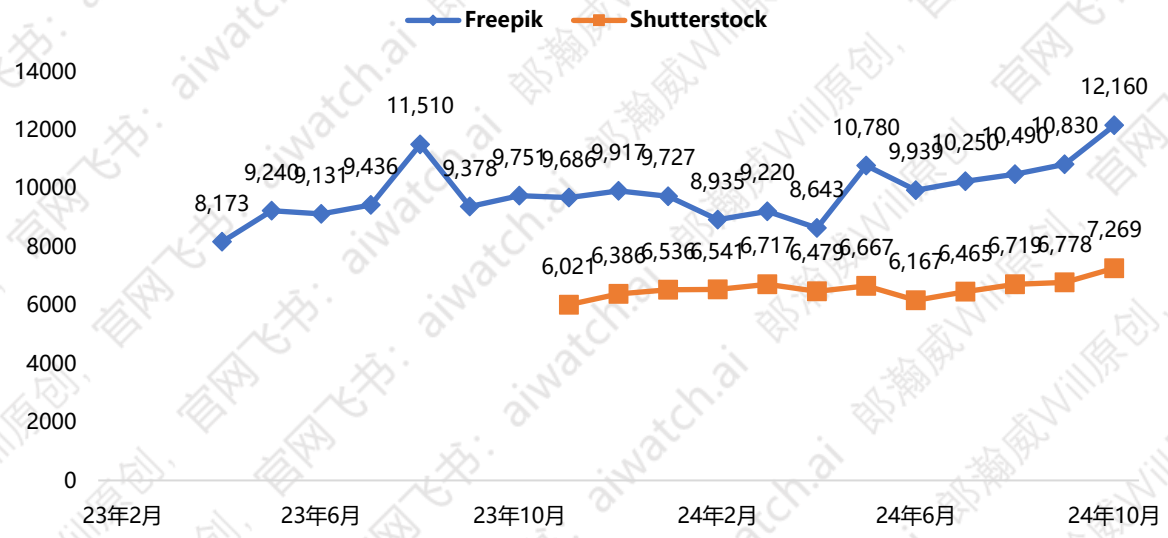


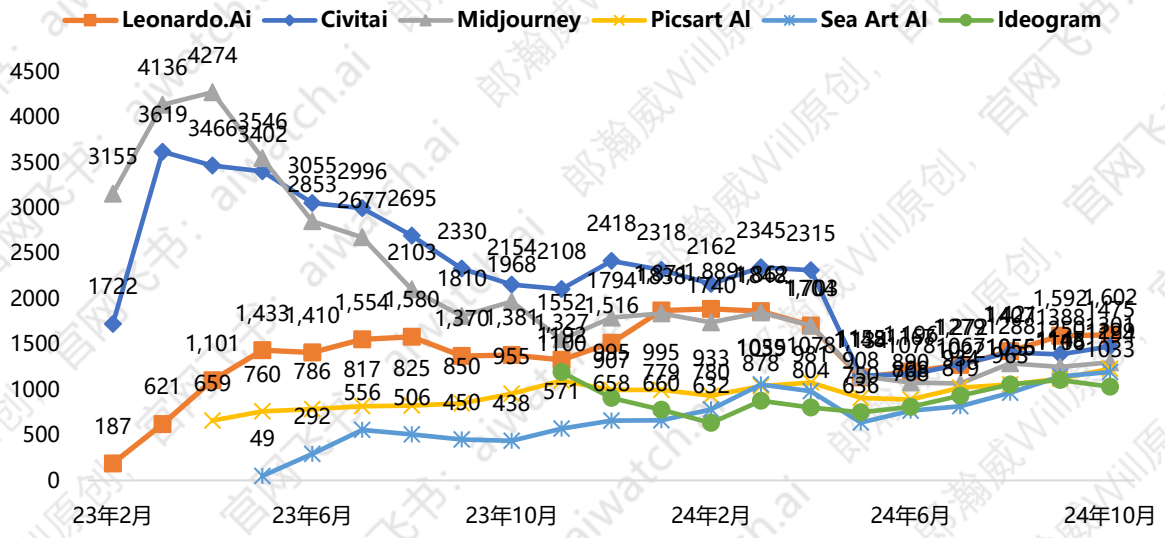


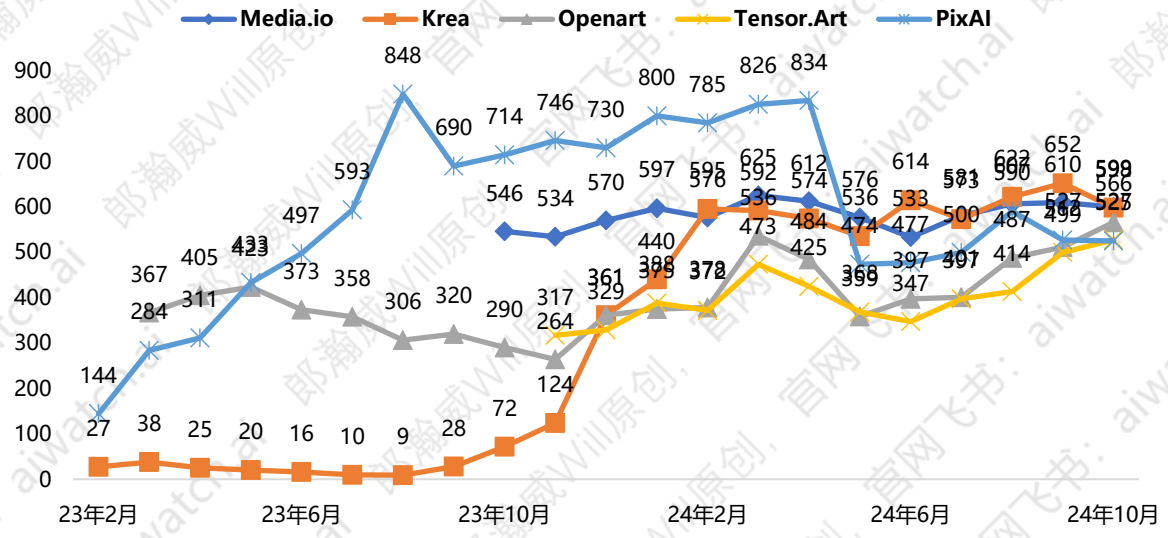


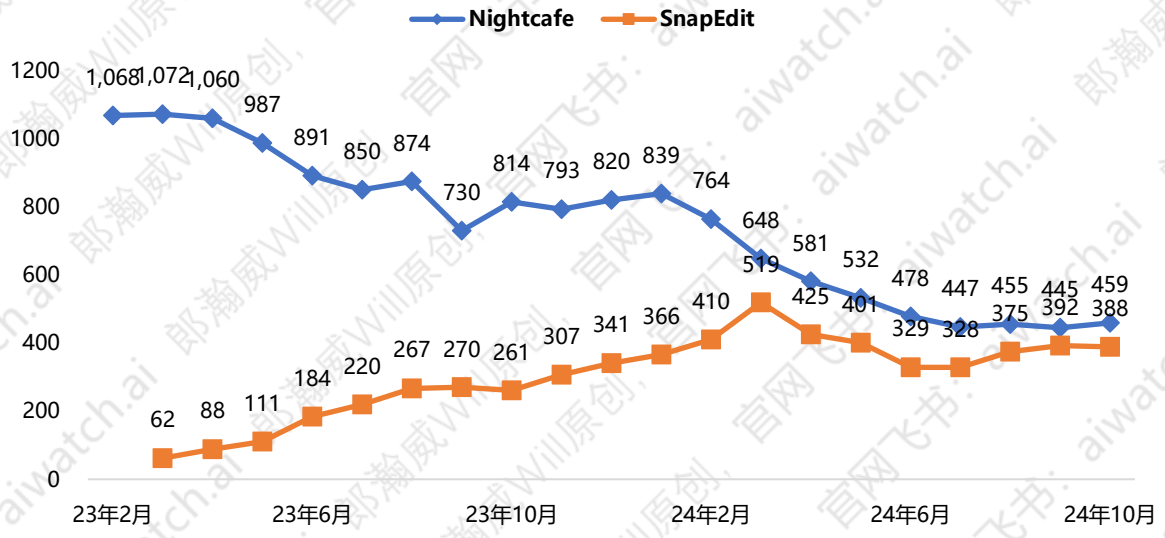
数据来源：similarweb 单位：万visit

图像生成 复合图表









数据来源：similarweb 单位：万visit

视频编辑

视频编辑

视频编辑 - Takeaway

1. 视频编辑赛道Top15，2024年10月总网页流量达8739万次访问。
2. VSCO月访问量1961万，位居榜首，loom访问量1661万，同比下降2%，位居第二，Veed AI访问量1222万，同比增长4%，排名第三。
3. 视频编辑赛道Top15总融资额达9000万美元，OpusClip Captions和Captions分别完成了3000万美元A轮和6000万美元C轮融资，显示出资本市场对视频字幕赛道的看好。
4. 从产品形态来看，除了传统的视频编辑工具外，AI字幕生成（如OpusClip Captions）和专业剪辑工具（如Type Studio）等细分赛道正在快速崛起。
5. 值得注意的是，整体市场规模从2023年2月的1.8M增长至2024年10月的87.4M，年增长率达到2%，表明视频编辑工具市场仍处于稳定增长阶段。

数据来源：similarweb 单位：万visit

视频编辑 - Top15

- **TOP15总融资额：9000万美元** (OpusClip Captions (Opus Clip 30M$)+Captions (Captions 60M$)=90M$)
- **Top15 总网页流量：8739万次visit**

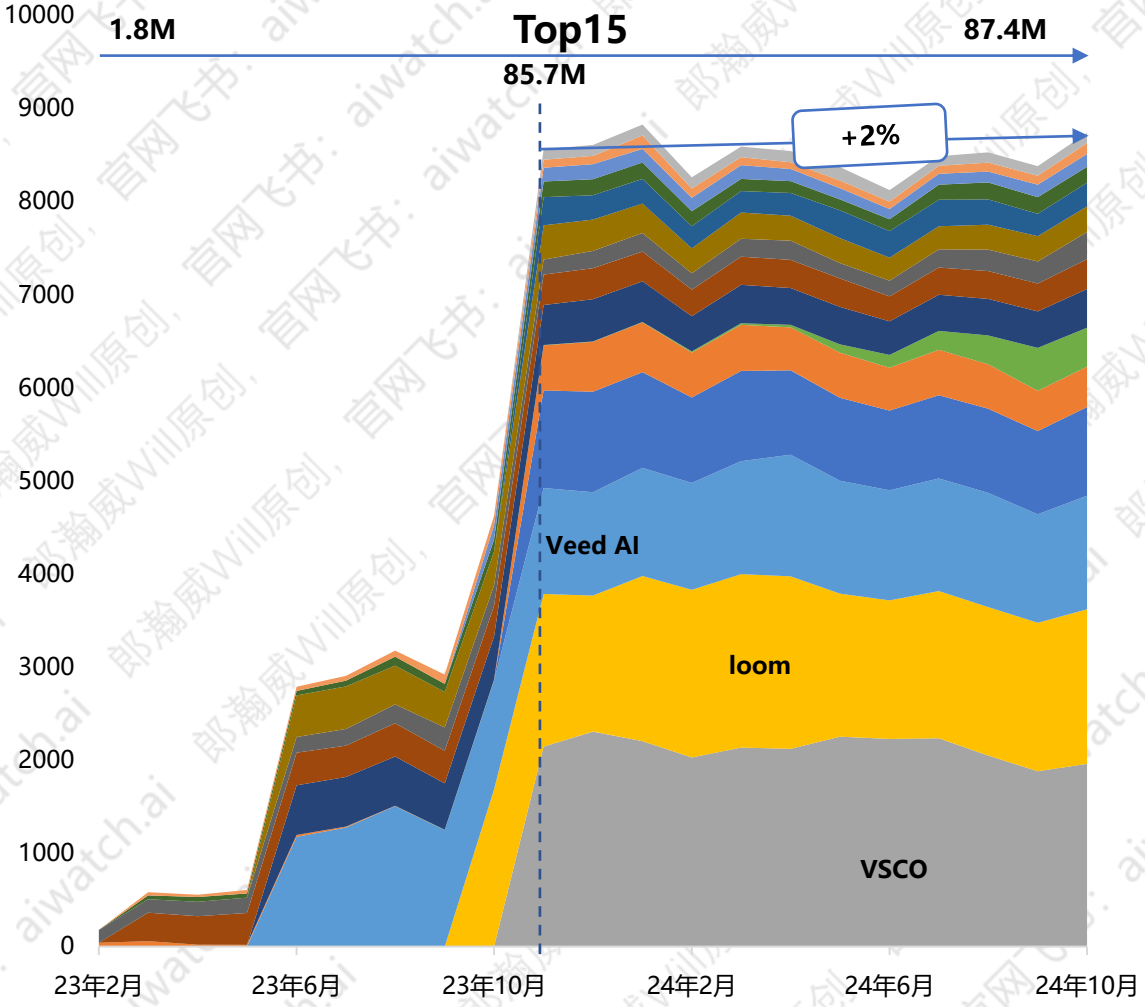
序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化	公司	最近融资轮次	最近融资日期	最近融资金额 M$	ARR M$	占比第一国家	占比
1	VSCO		1,961	-	VSCO				-	United States	38%
2	loom	1,688	1,661	-2%	loom				-	United States	42%
3	Veed AI	1,172	1,222	4%	Veed				25	India	14%
4	Clipchamp		952	-	Clipchamp				-	United States	15%
5	Type Studio		433	-	Type Studio				-	United States	31%
6	Zeemo		419	-	Zeemo				-	Brazil	38%
7	Kapwing AI	466	416	-11%	Kapwing				-	United States	25%
8	FlexClip	328	321	-2%	FlexClip				-	India	11%
9	HitPaw Official	220	291	32%	HitPaw				-	United States	14%
10	Filmora	363	277	-24%	万兴科技				-	United States	14%
11	OpusClip Captions		252	-	Opus Clip	A轮	2024/8/28	30	-	United States	30%
12	Captions	131	174	32%	Captions	C轮	2024/7/9	60	-	Brazil	12%
13	Video Converter	153	138	-10%	Video Converter				-	Russia	12%
14	FineShare FineCam	102	116	14%	FineShare				-	United States	27%
15	剪映CapCut		109	-	字节				-	China	85%

数据来源：similarweb 单位：万visit

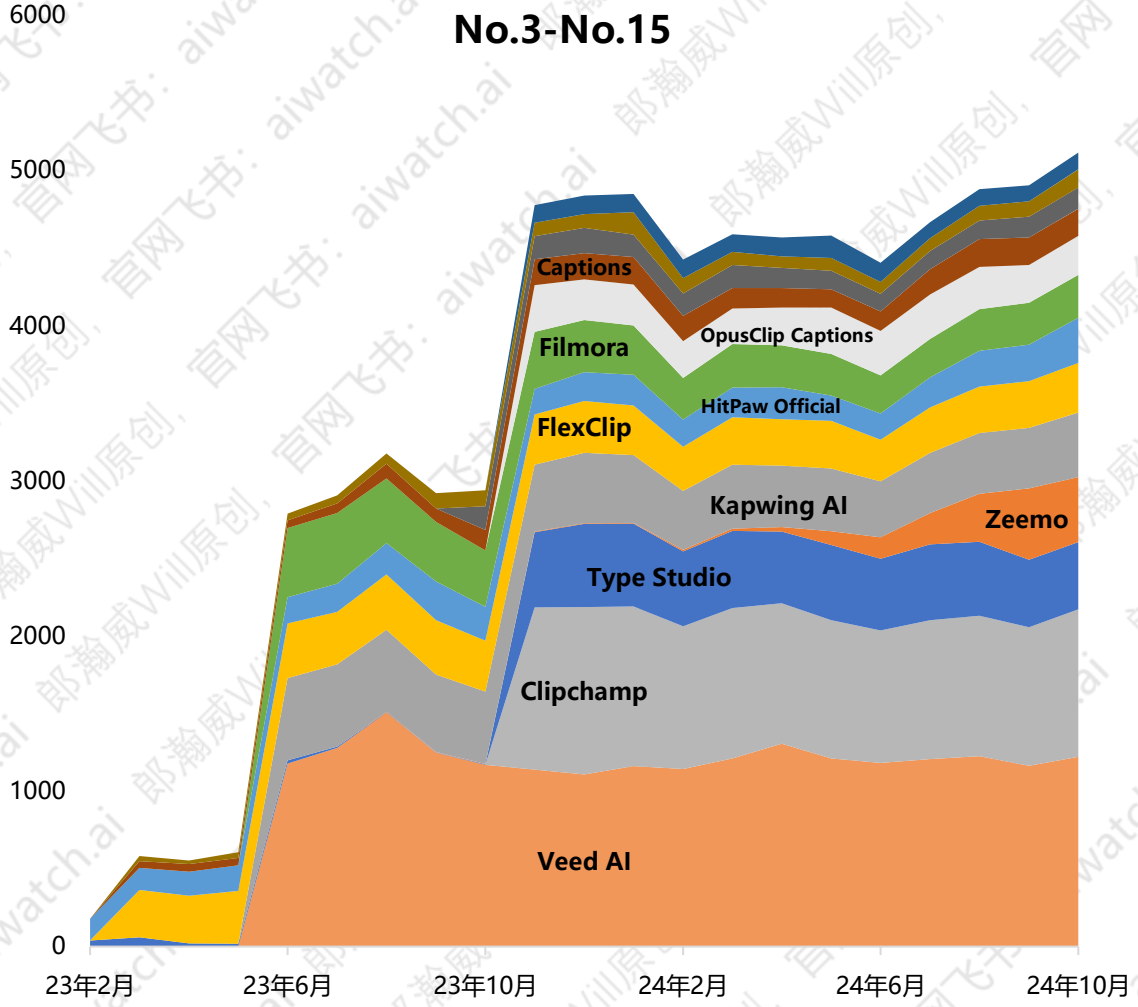
官网飞书：aiwatch.ai 郎瀚威Will原创

视频编辑 网页流量趋势 10月总量：8739万

- VSCO、loom和Veed AI稳居前三，月访问量均超过1000万。三家企业共同占据主要市场份额，形成稳定的市场格局。虽然整体市场增长放缓，但头部企业的领先优势依然明显。



- 在3-15名的竞争中，Clipchamp、Type Studio和Zeemo表现突出，尤其是Type Studio和Zeemo的爆发式增长，显示出第二梯队创新活力。同时，传统玩家如Kapwing AI、FlexClip等保持稳定发展。

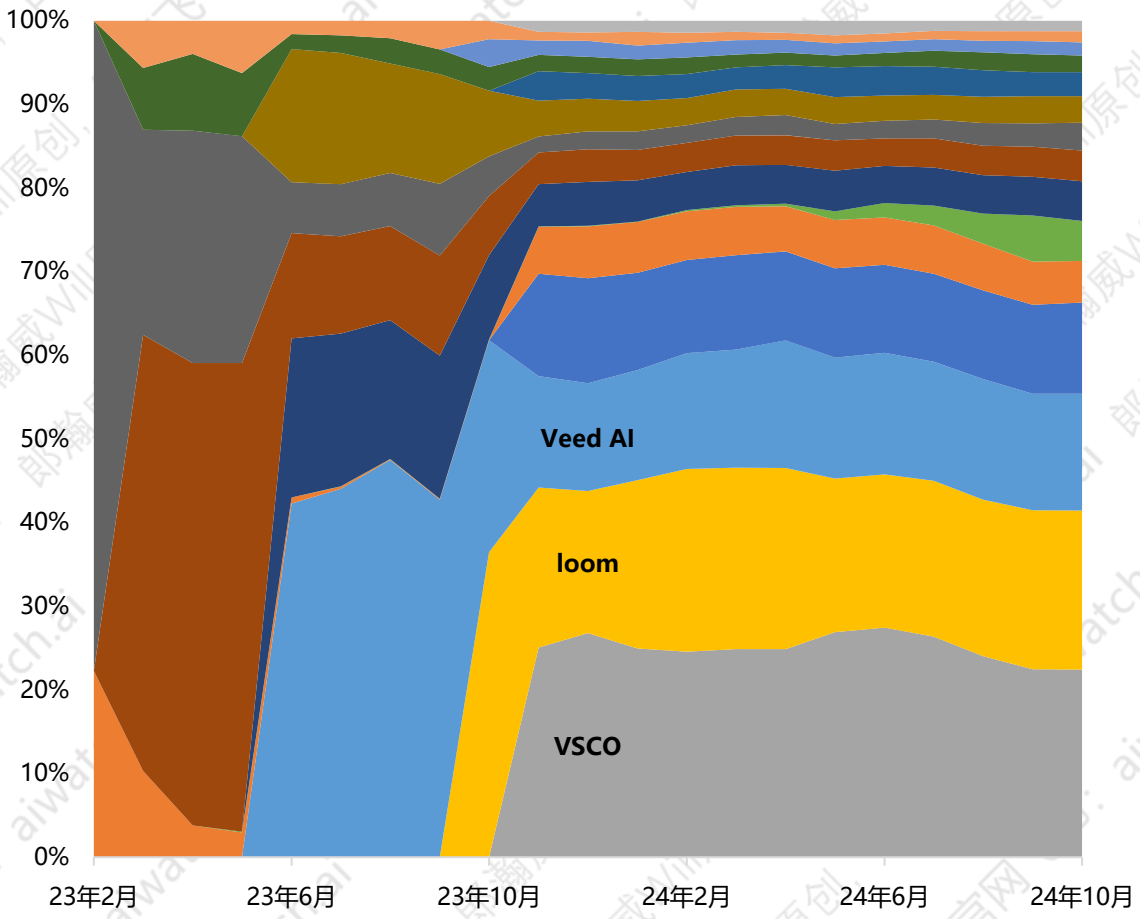


数据来源：similarweb 单位：万visit

视频编辑2023.2~2024.10 网页流量占比

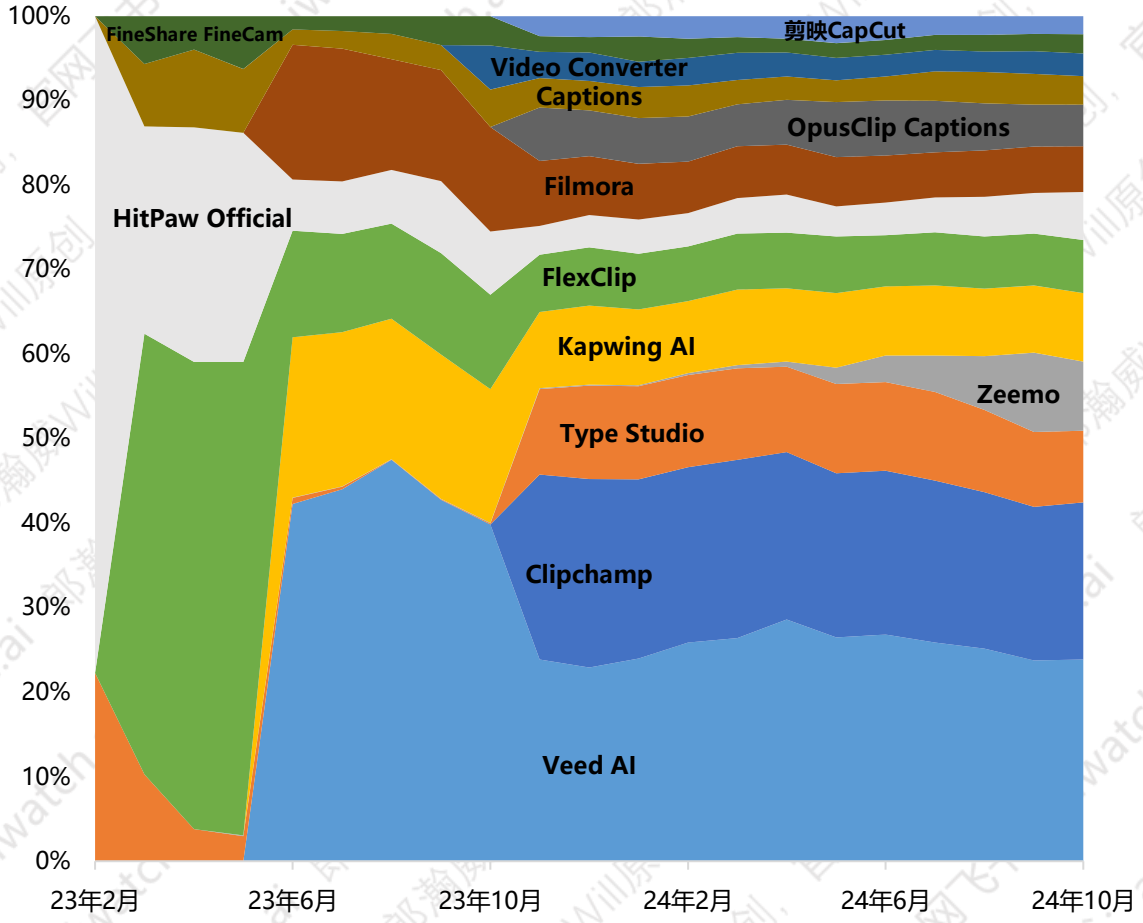
- Top15占比分析：VSCO和loom的市场主导地位持续稳固，虽然新进入者不断涌现，但头部企业的竞争优势仍然明显，市场集中度保持在较高水平。

Top15占比



- 3-15名占比分析：第二梯队呈现百花齐放态势，Type Studio、Clipchamp等新锐力量崛起，而OpusClip Captions、Captions等专业工具稳步发展，形成多元化竞争格局。

No.3-No.15占比



数据来源：similarweb 单位：万visit

视频编辑 国际 | 国产 | 出海 Top10

国际

- VSCO(1961万访问)一家独大，美国产品占据主导

	产品名称	24年10月(万visit)
1	VSCO	1,961
2	loom	1,661
3	Veed AI	1,222
4	Clipchamp	952
5	Type Studio	433
6	Kapwing AI	416
7	FlexClip	321
8	HitPaw Official	291
9	OpusClip Captions	252
10	Captions	174

国产

- 剪映CapCut领先(109万访问)，但与国际差距明显

	产品名称	24年10月(万visit)
1	剪映CapCut	109
2	万兴喵影	30
3	网易见外工作台	24
4	分秒帧	15
5	录咖	11
6	必剪	9
7	360快剪辑	4
8	秀展网	3
9	悦录	3
10	开拍	2

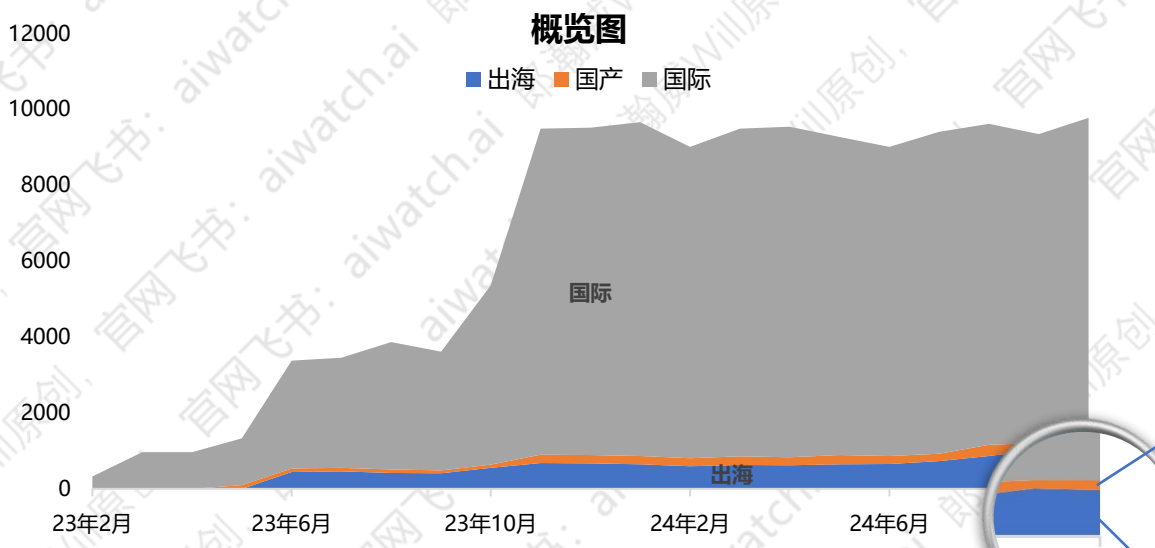
出海

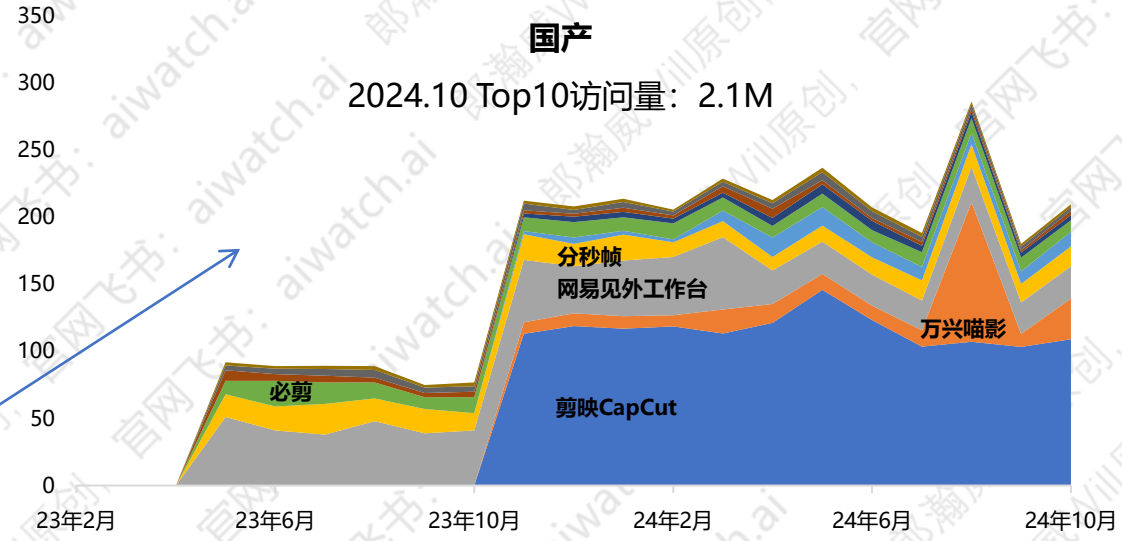
- Zeemo(419万访问)、Filmora(277万访问)表现突出

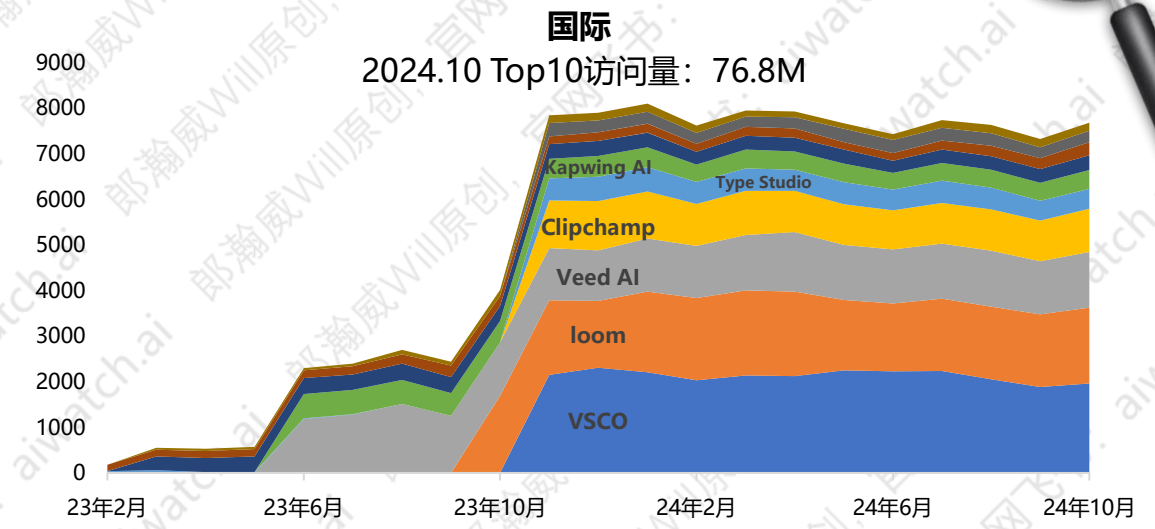
序号	产品名称	24年10月(万visit)
1	Zeemo	419
2	Filmora	277
3	Video Converter	138
4	UniConverter	93
5	gemoo.com	64

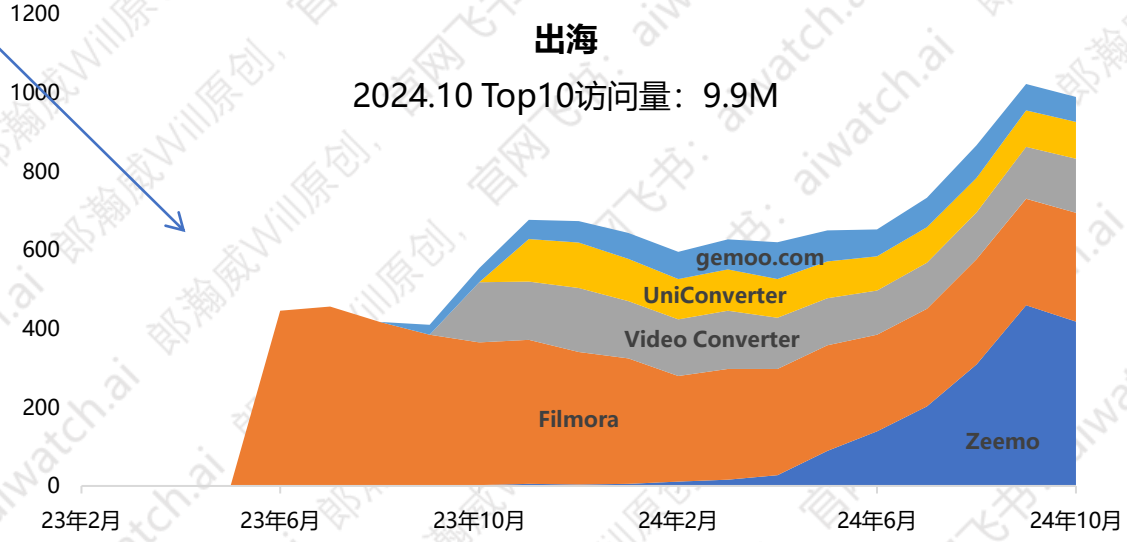
数据来源：similarweb 单位：万visit

视频编辑 国际 88% | 国产 2% | 出海 10%



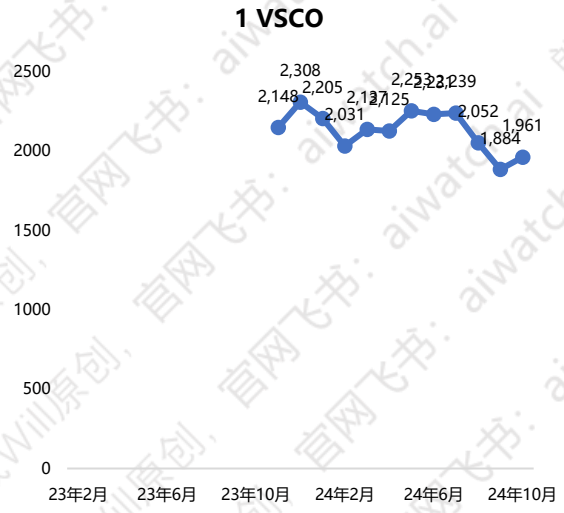


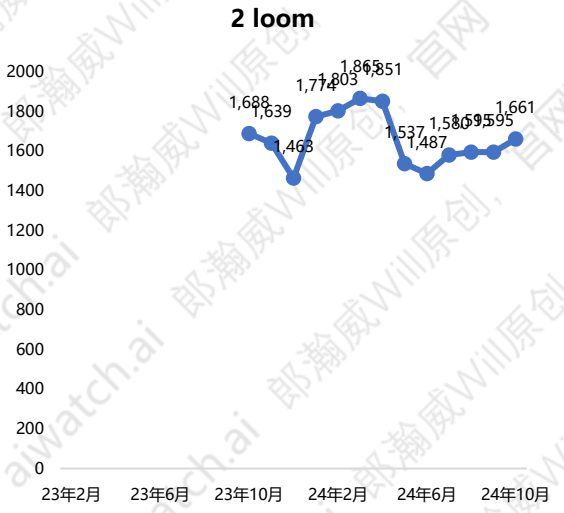


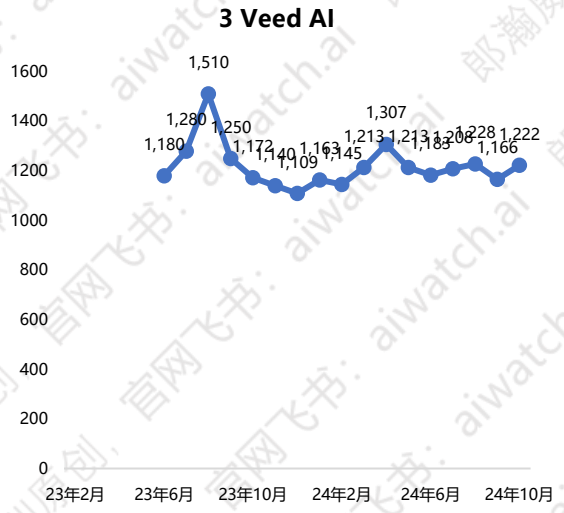


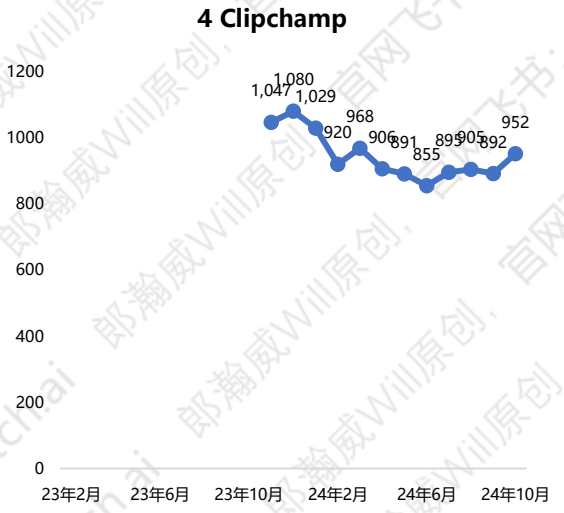
数据来源：similarweb 单位：万visit

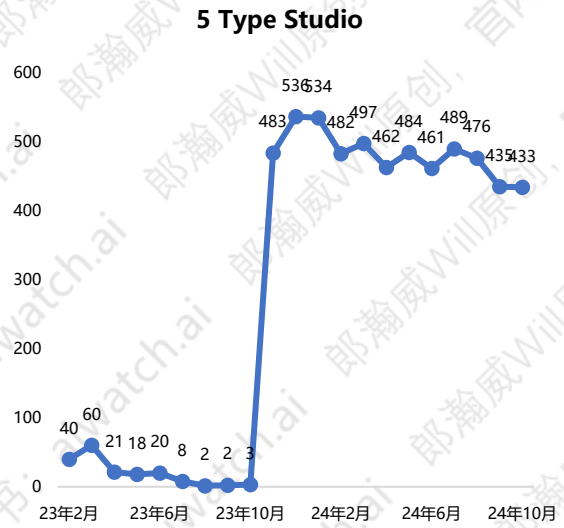
视频编辑 No.1-No.8

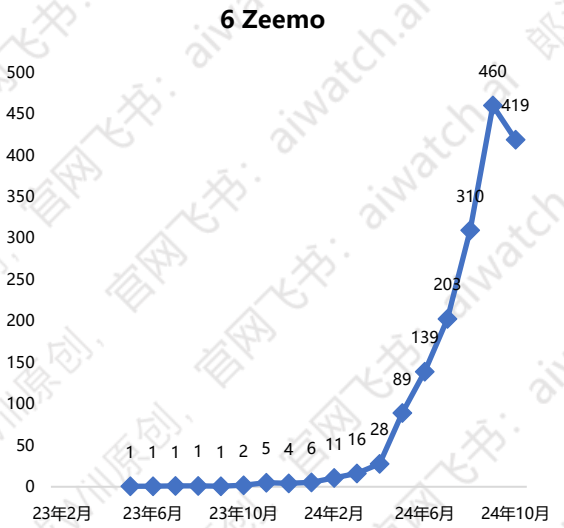


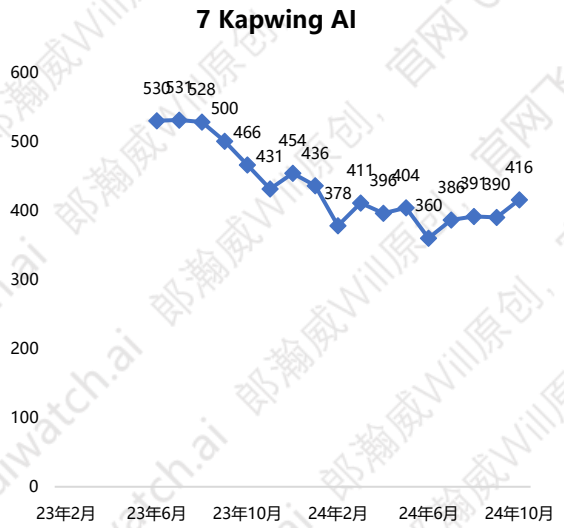


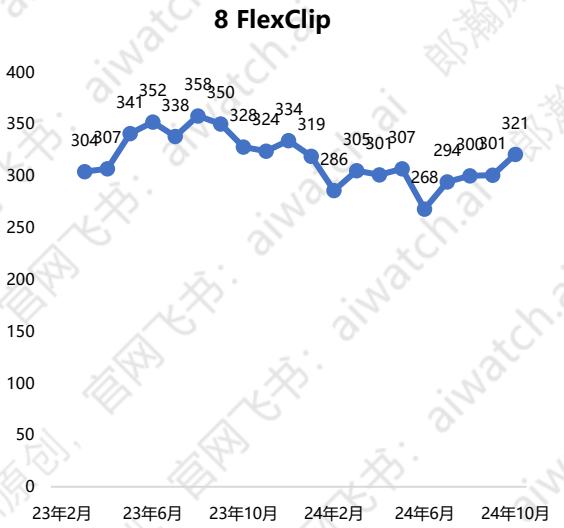








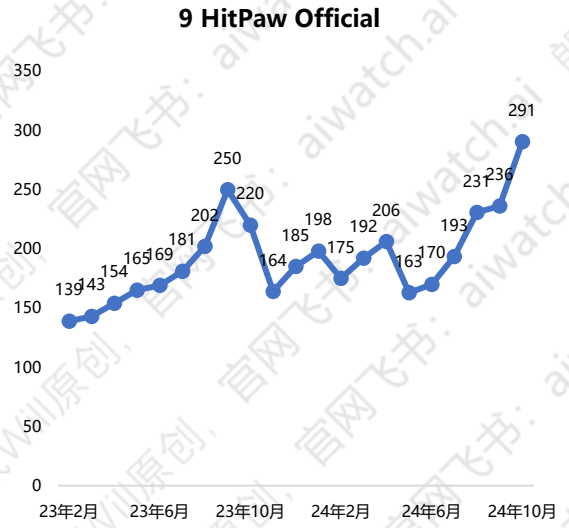


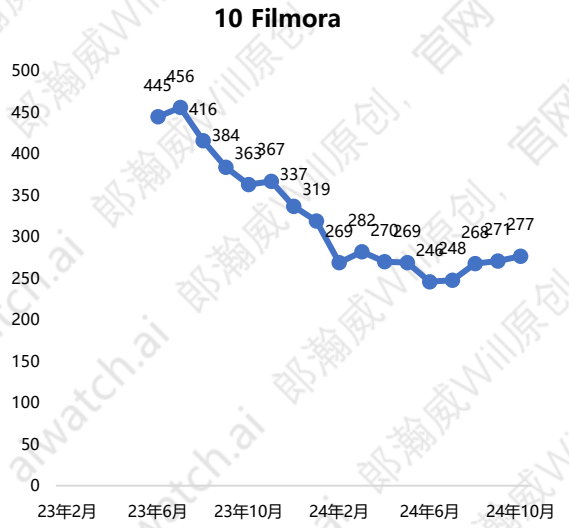


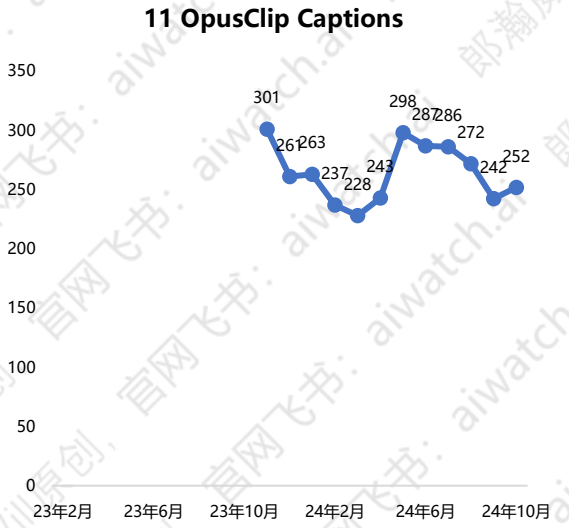
数据来源：similarweb 单位：万visit

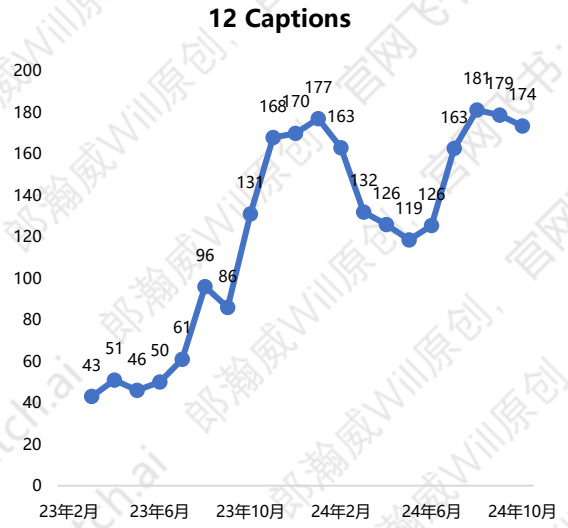
郎瀚威Will原创，官网飞书：aiwatch.ai

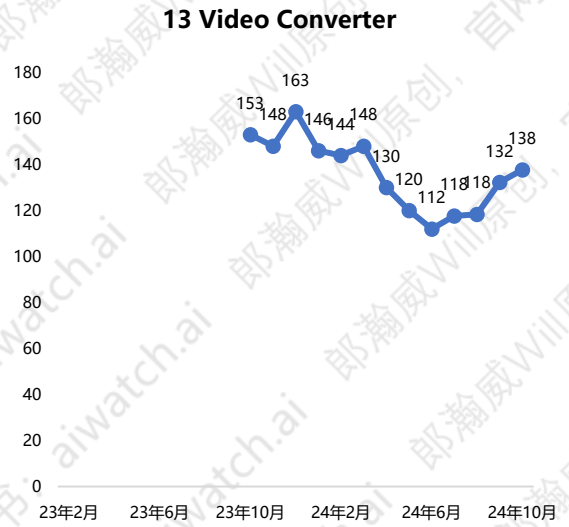
视频编辑 No.9-No.16

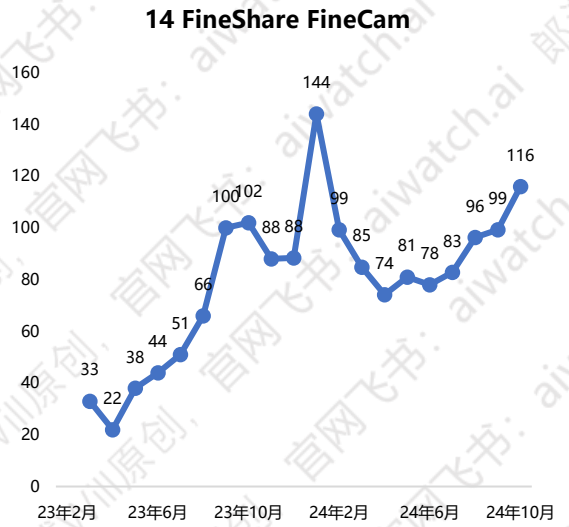


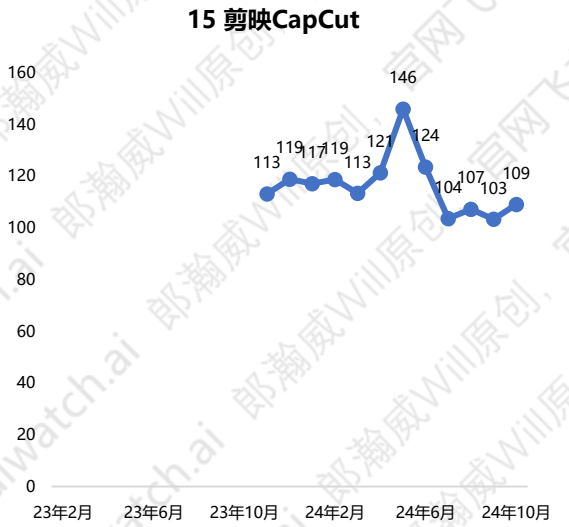


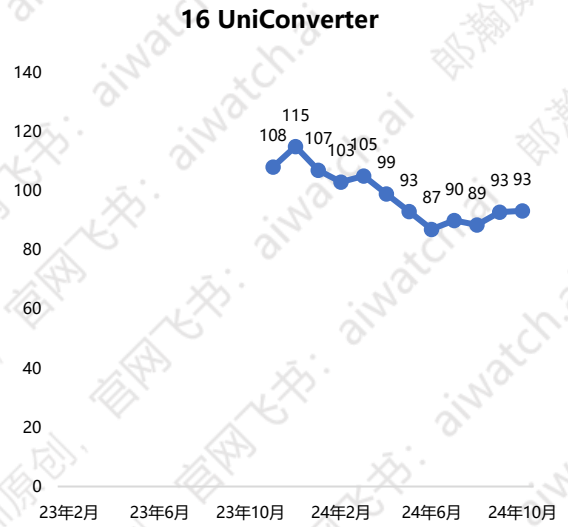








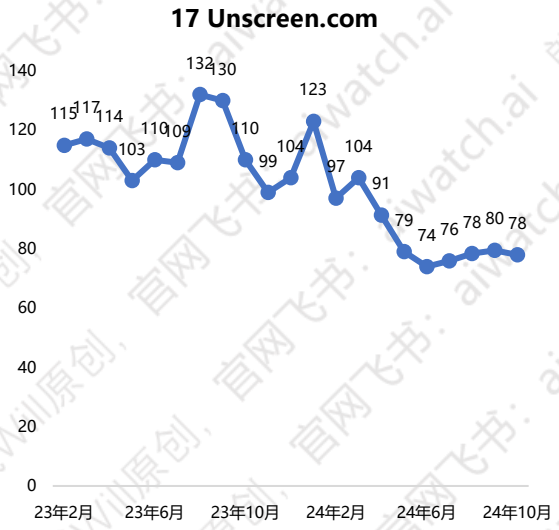


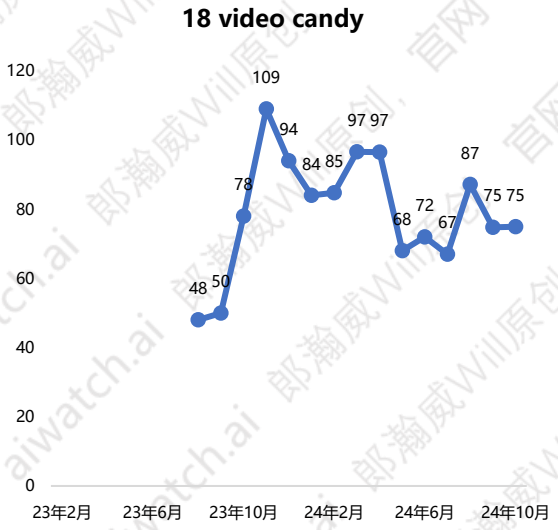


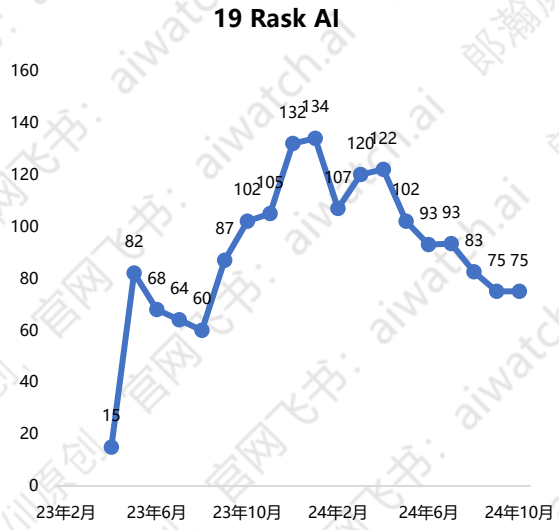
数据来源：similarweb 单位：万visit

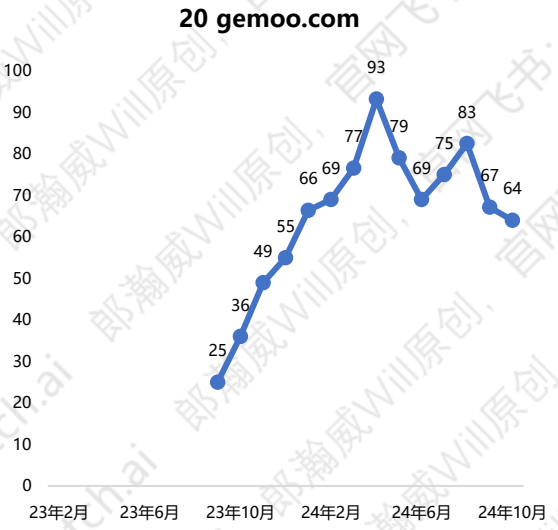
官网飞书：aiwatch.ai 郎瀚威Will原创

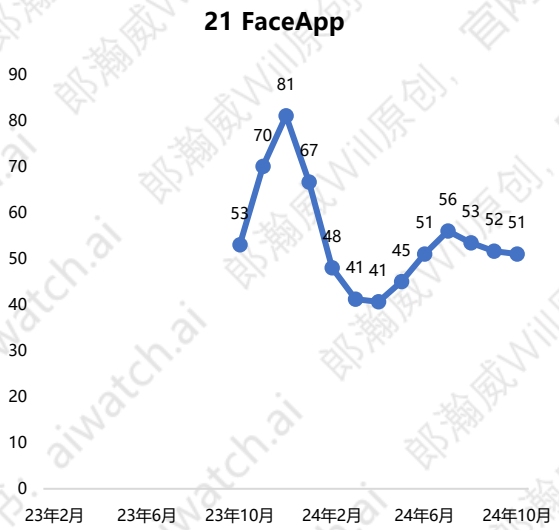
视频编辑 No.17-No.24

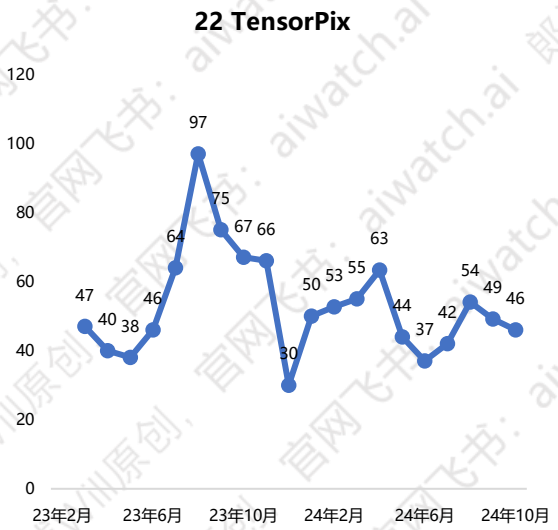


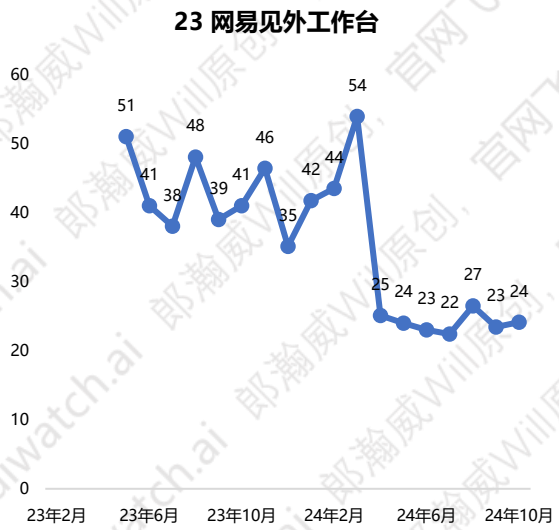


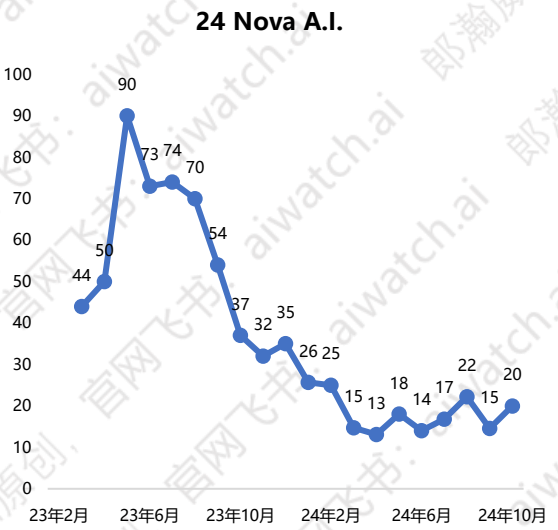






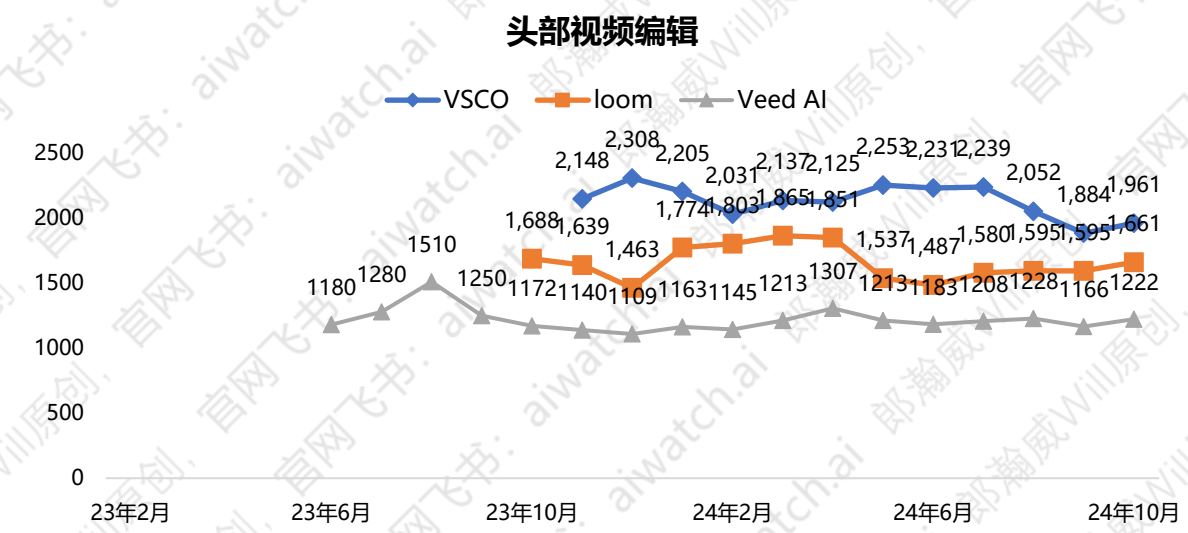


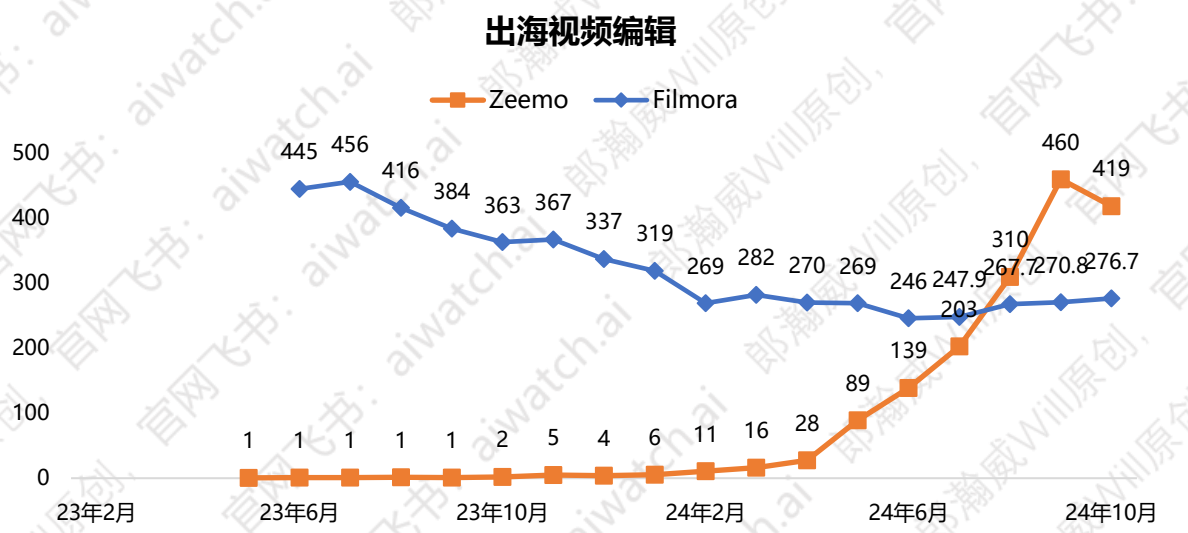


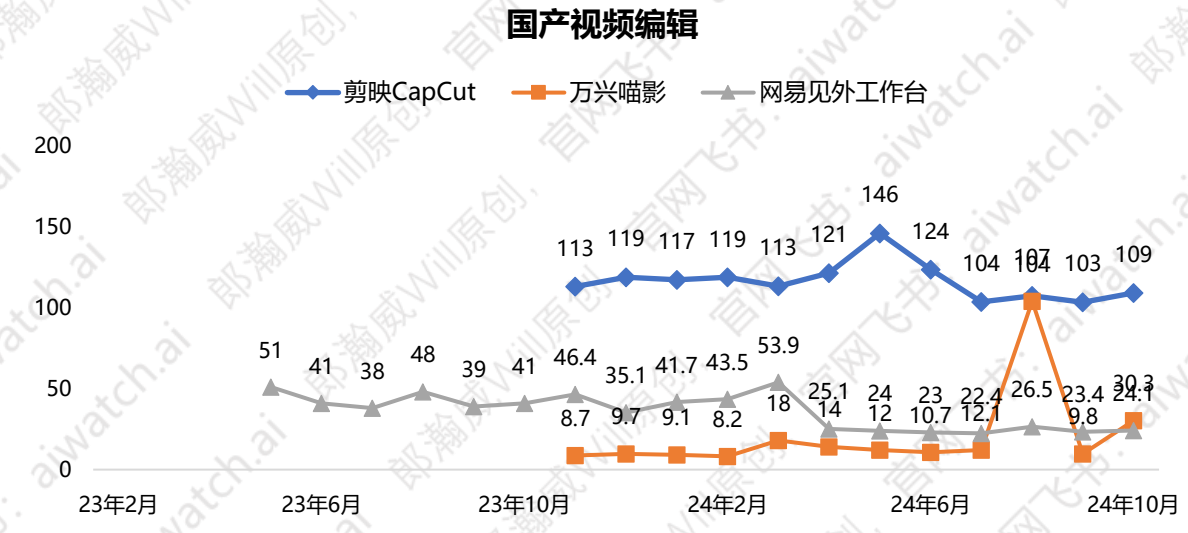


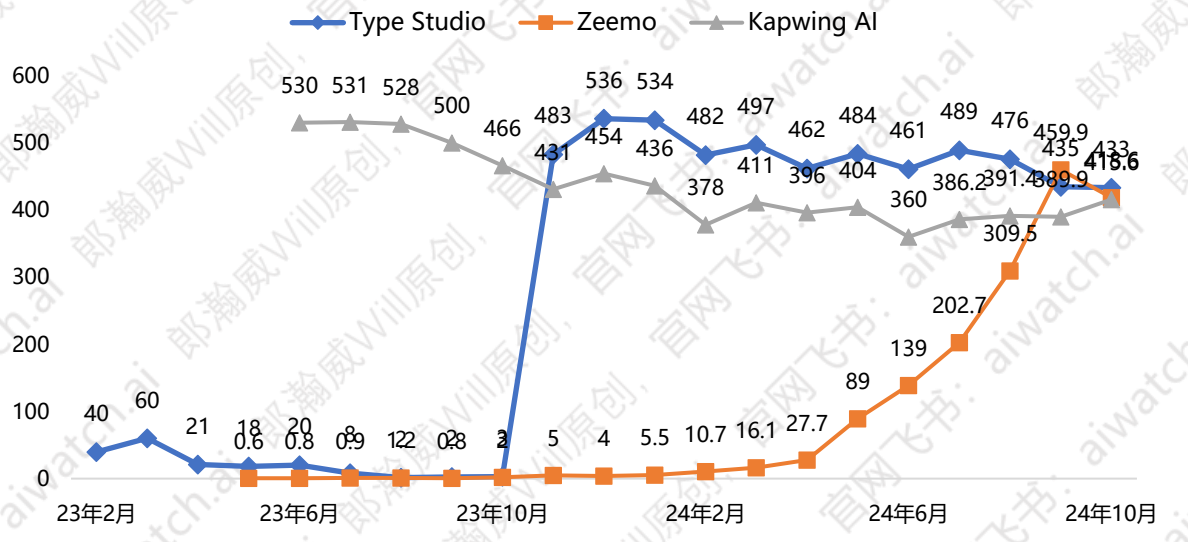
数据来源：similarweb 单位：万visit

视频编辑 复合图表







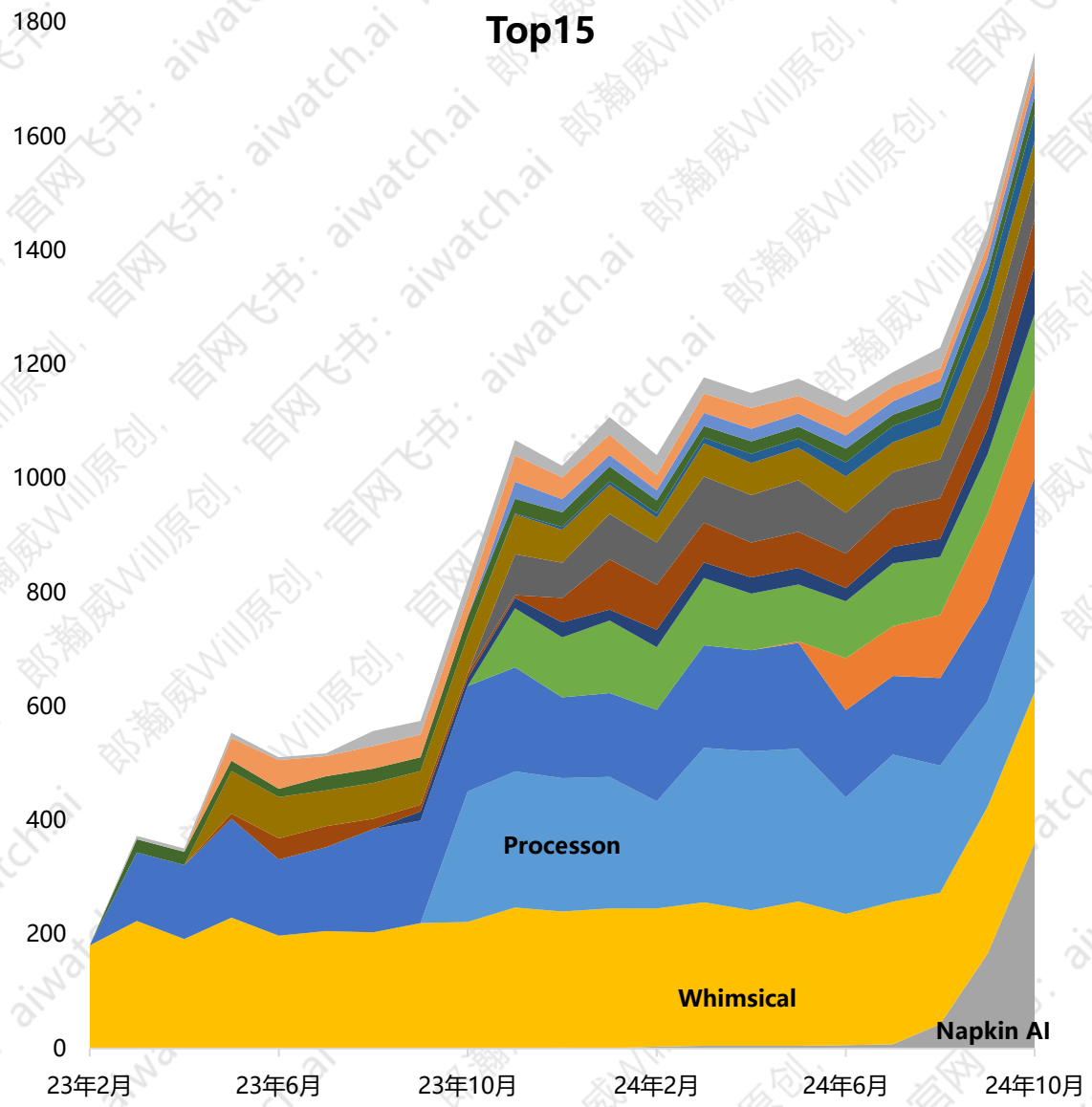


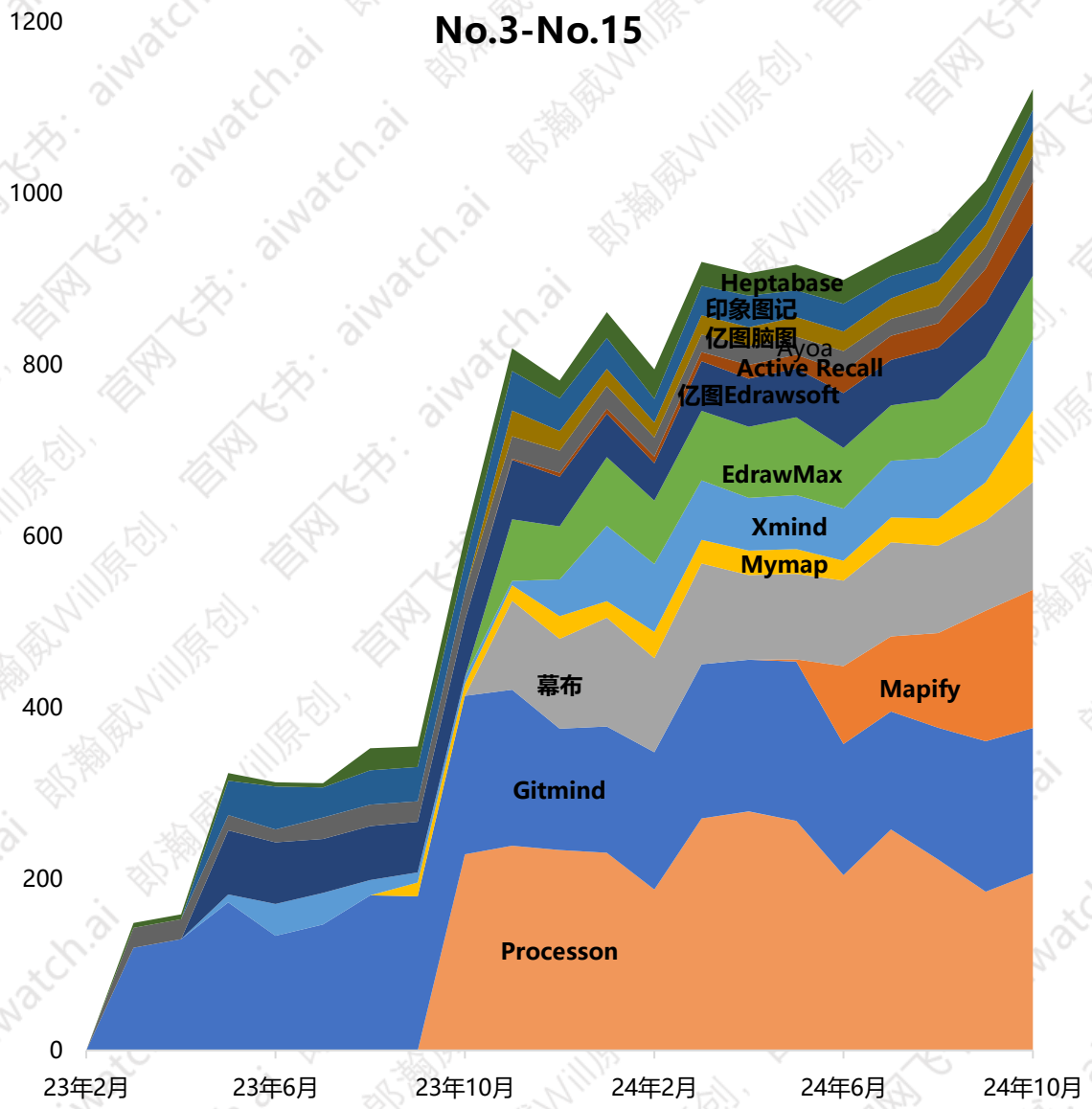
数据来源：similarweb 单位：万visit

思维导图

思维导图

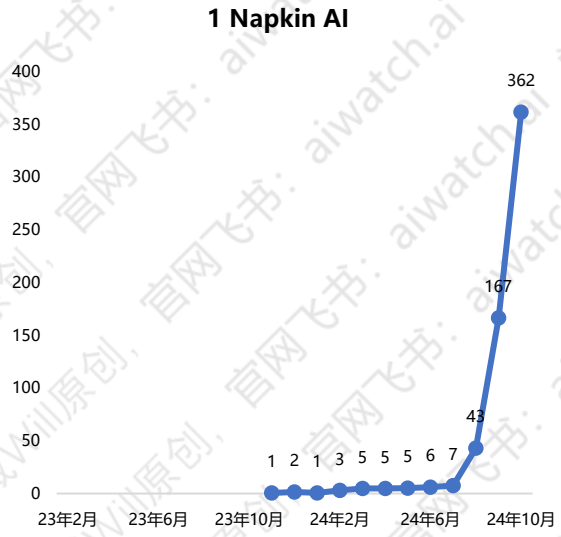
思维导图- 网页流量趋势 10月总量：1702.9万

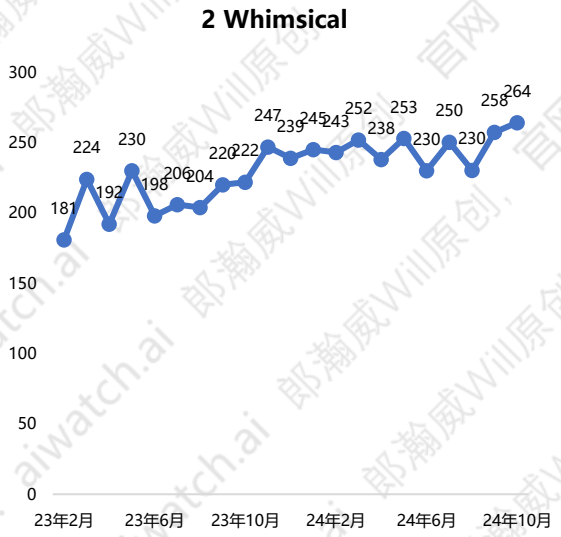


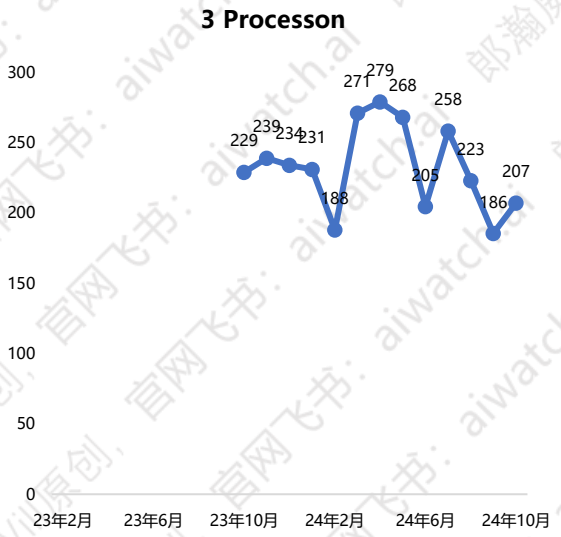


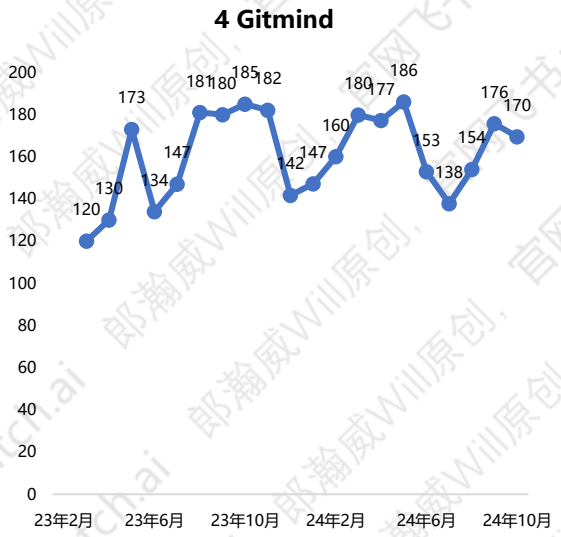
数据来源：similarweb 单位：万visit

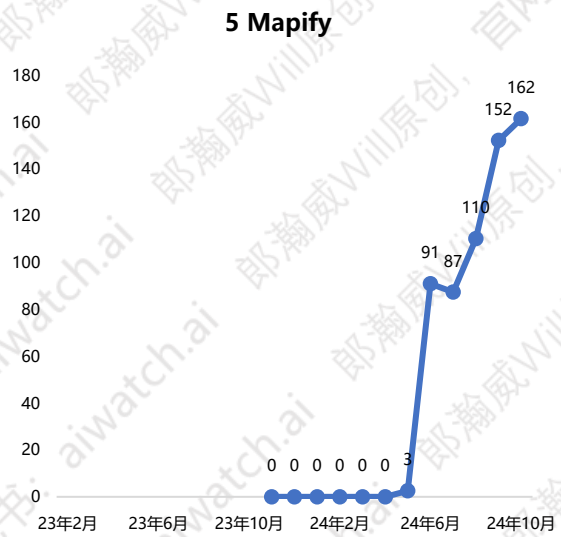
思维导图- Top8

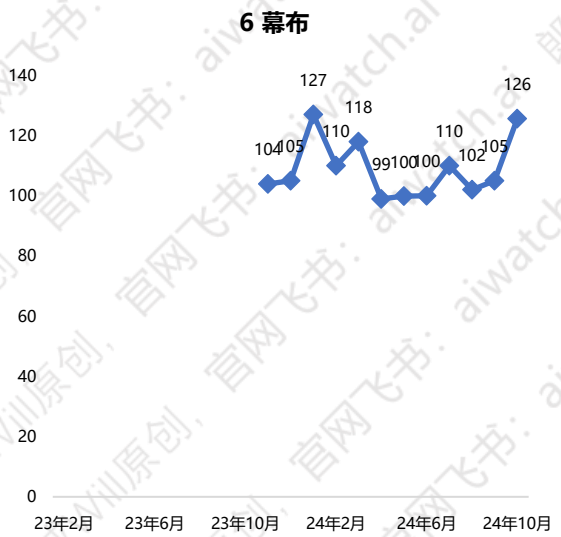


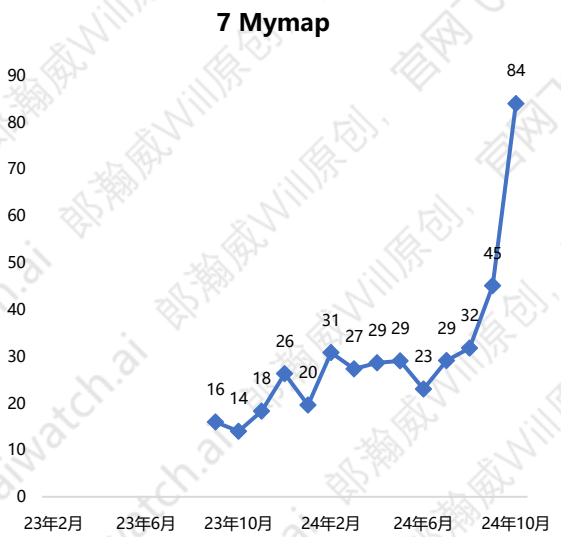


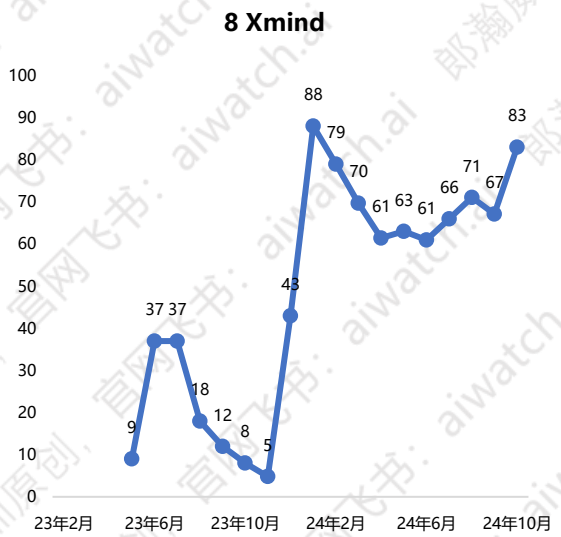










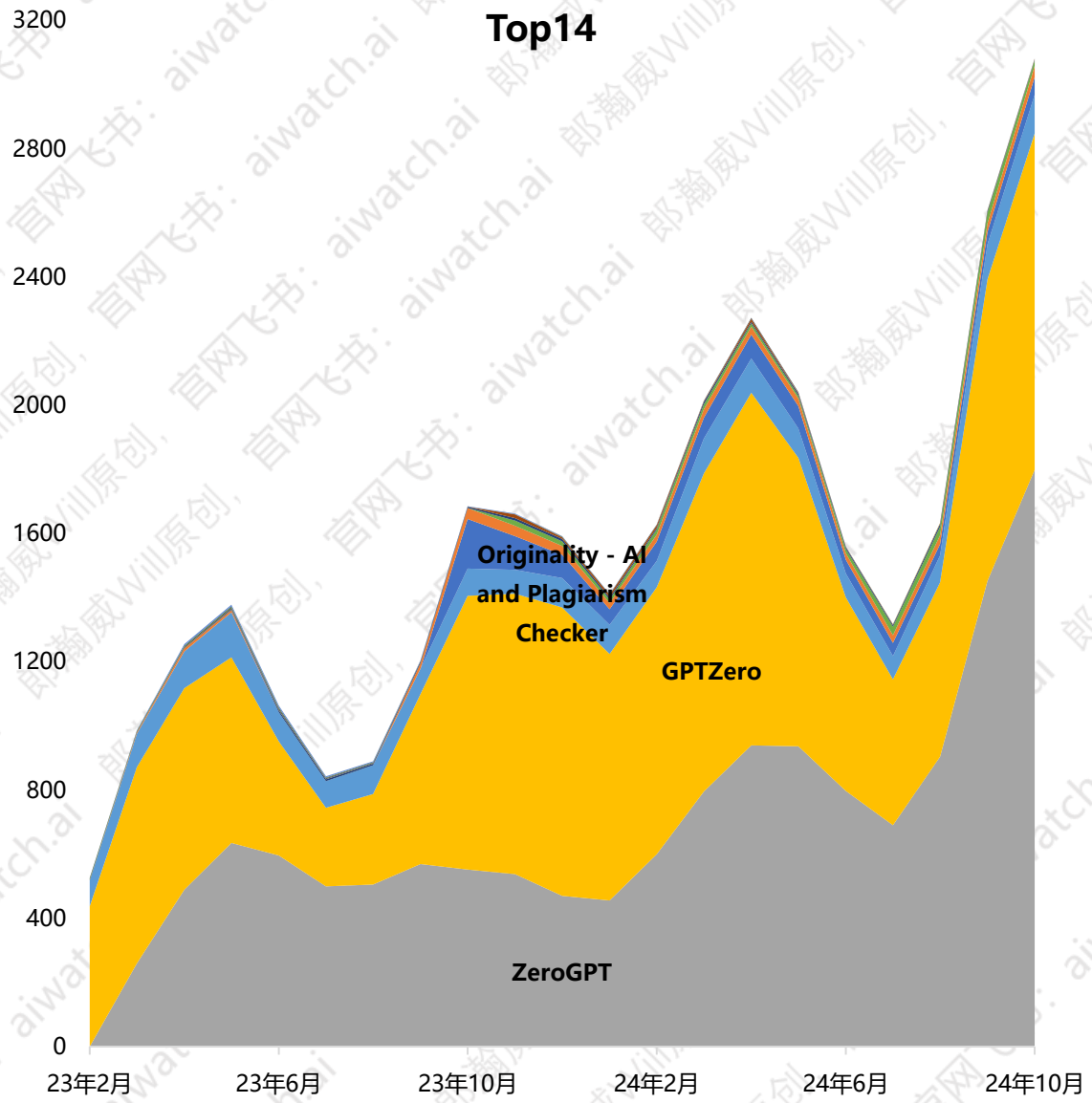


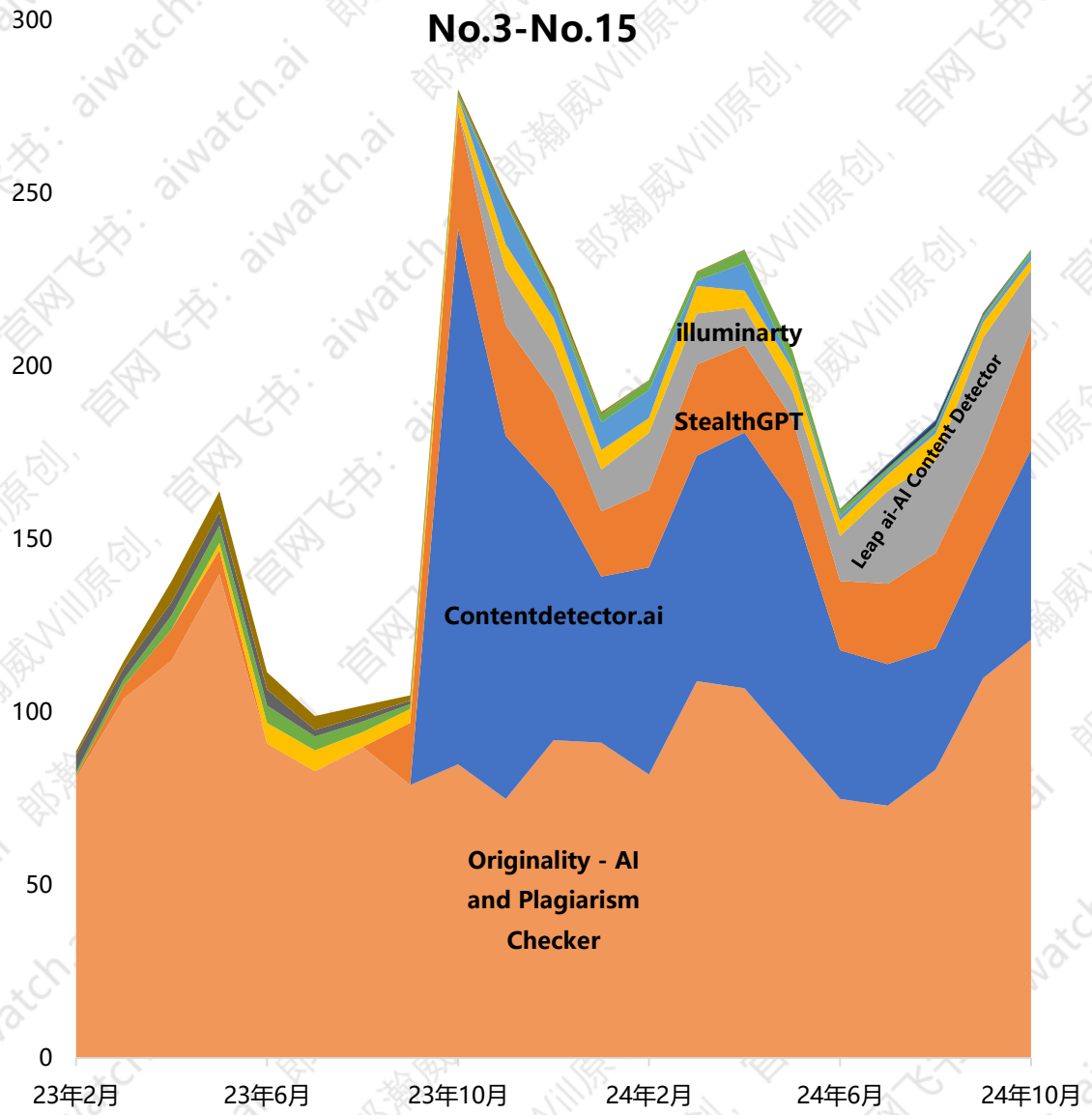
数据来源：similarweb 单位：万visit

AI检测

AI检测

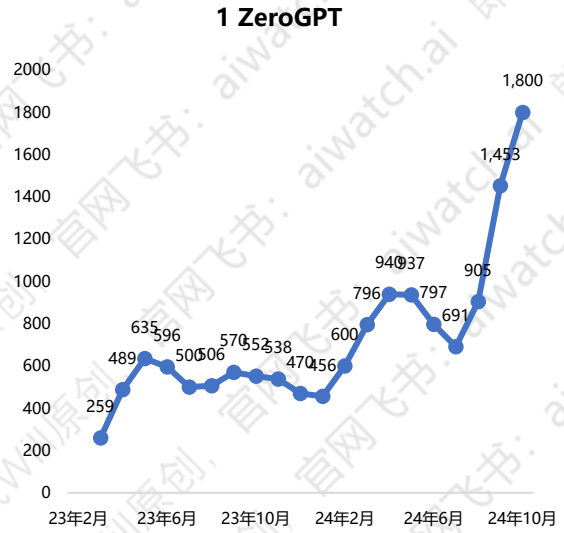
AI检测- 网页流量趋势 10月总量：3082.9万

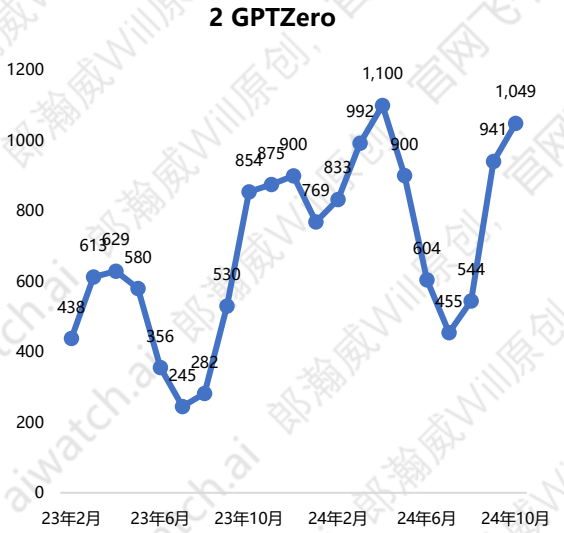


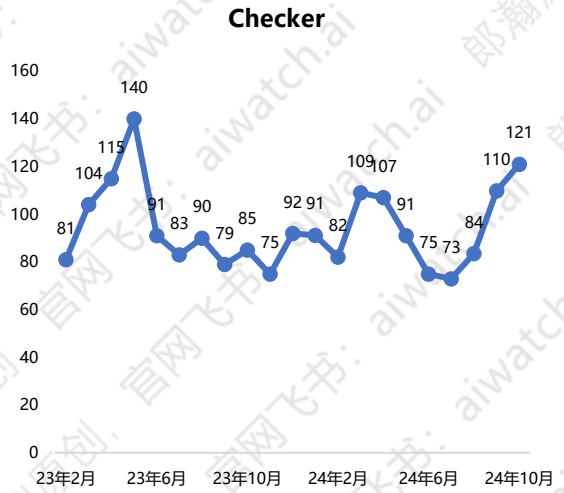


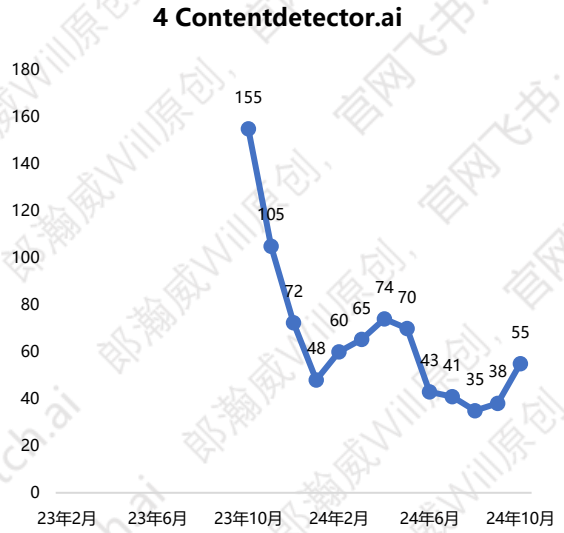
数据来源：similarweb 单位：万visit

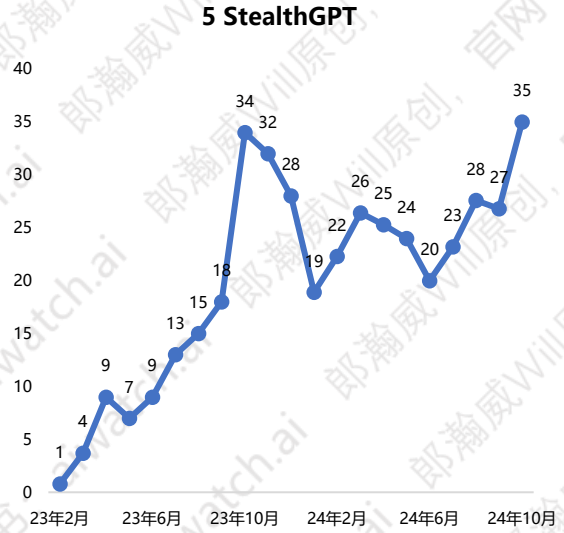
AI检测- Top8

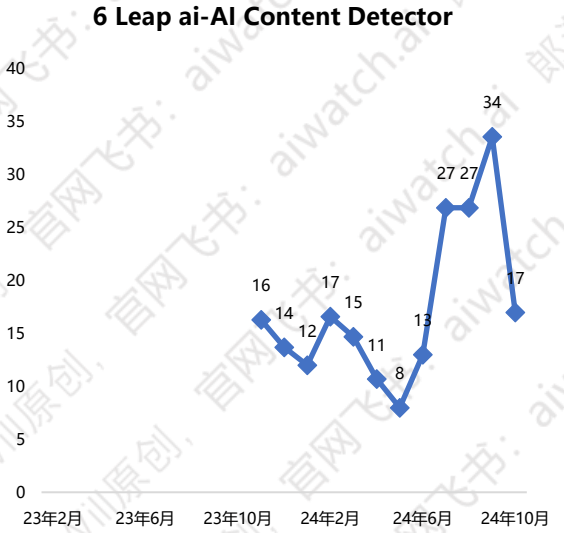


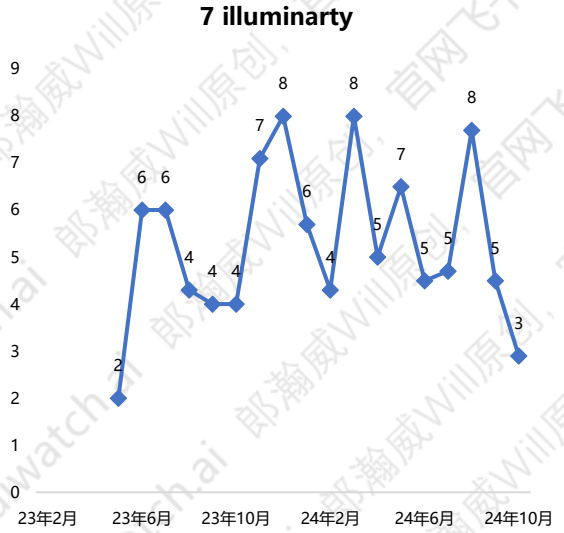


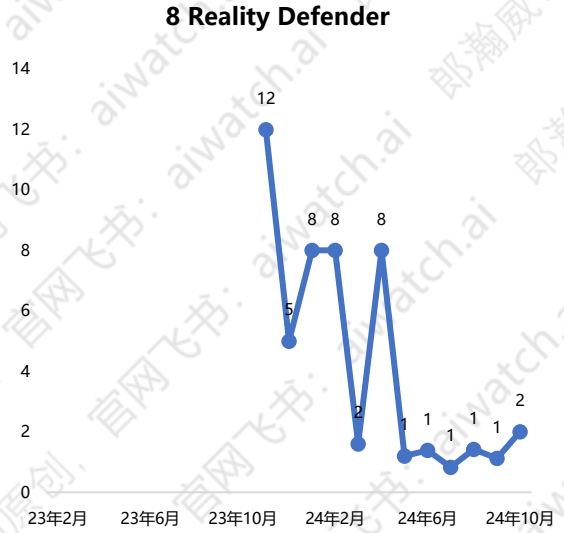










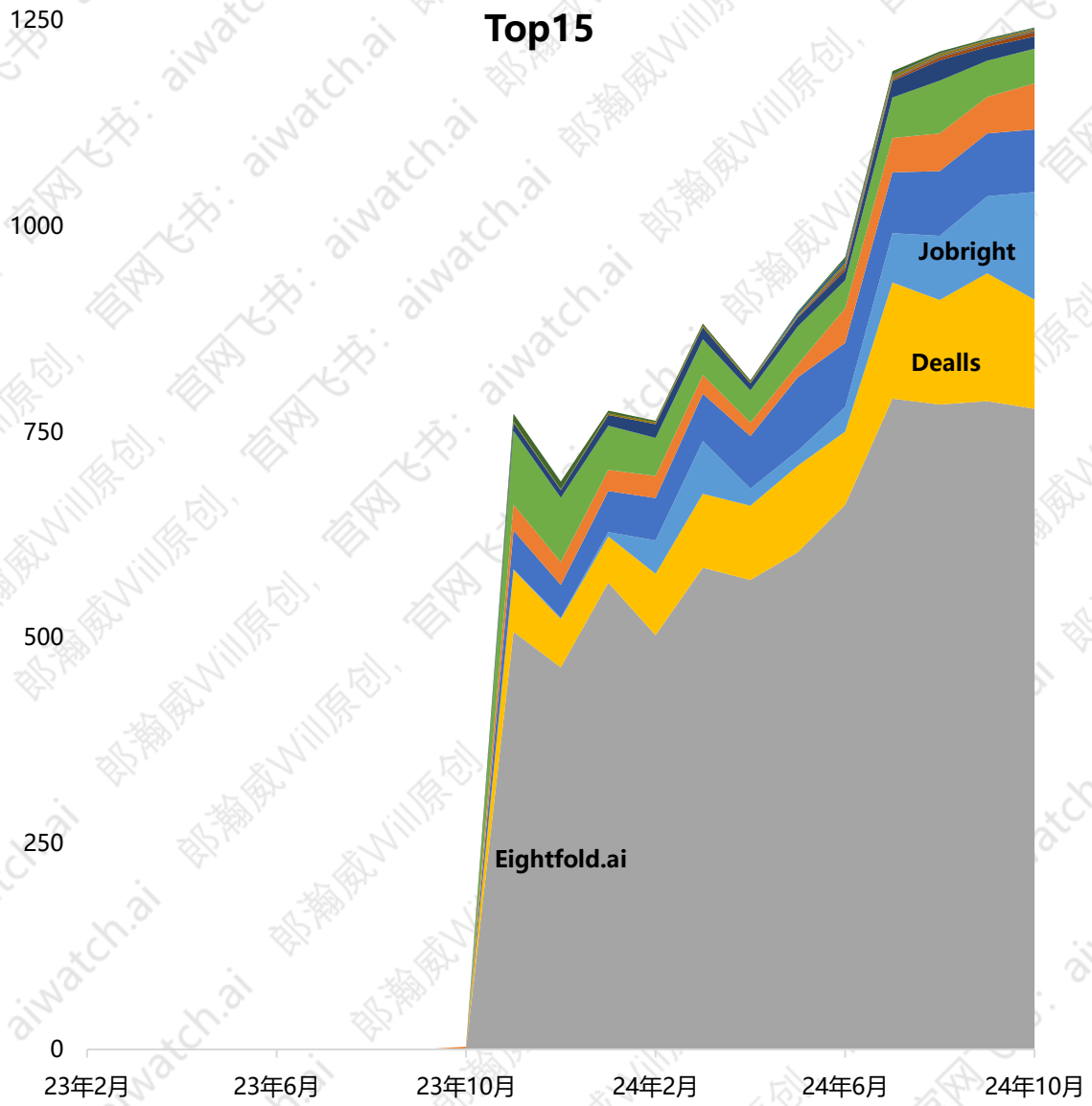


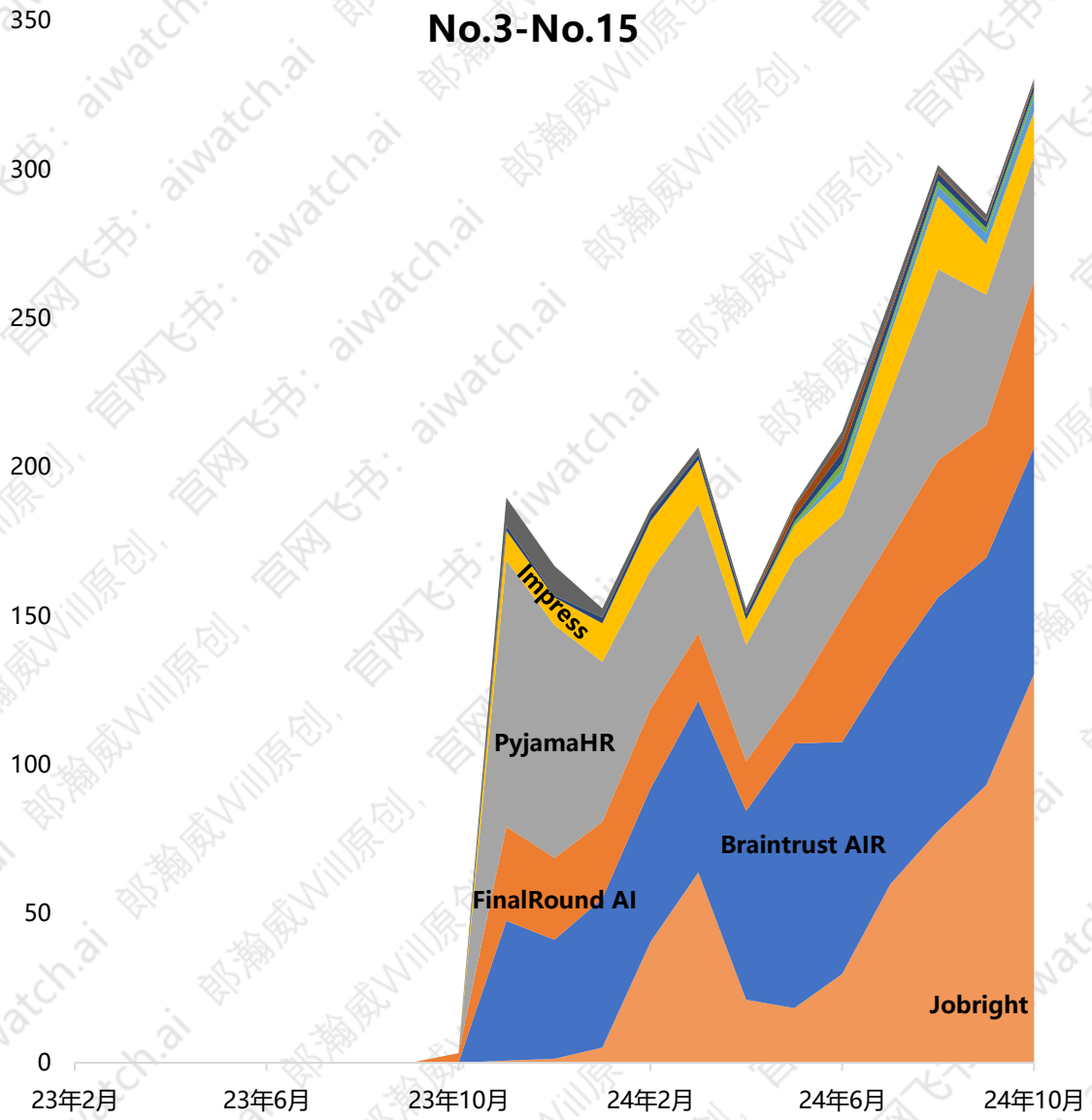
数据来源：similarweb 单位：万visit

招聘

招聘/面试

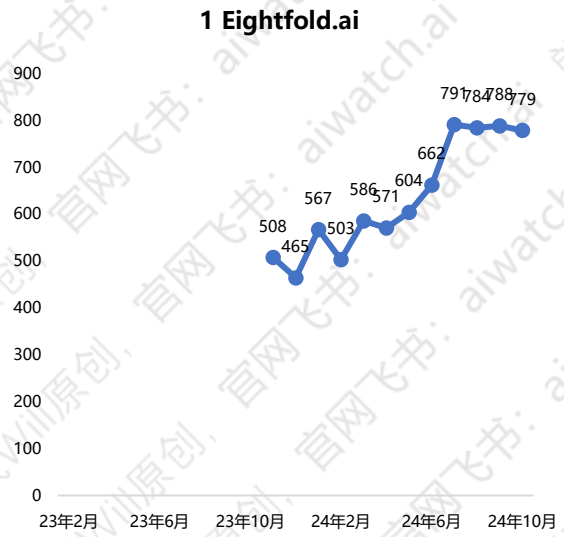
招聘- 网页流量趋势 10月总量：1242.2万

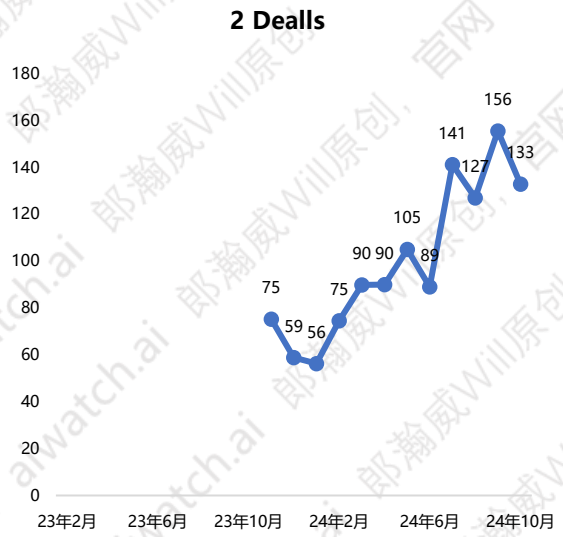


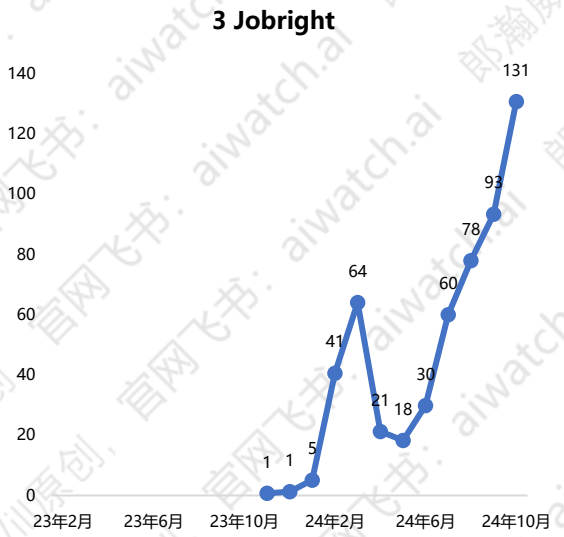


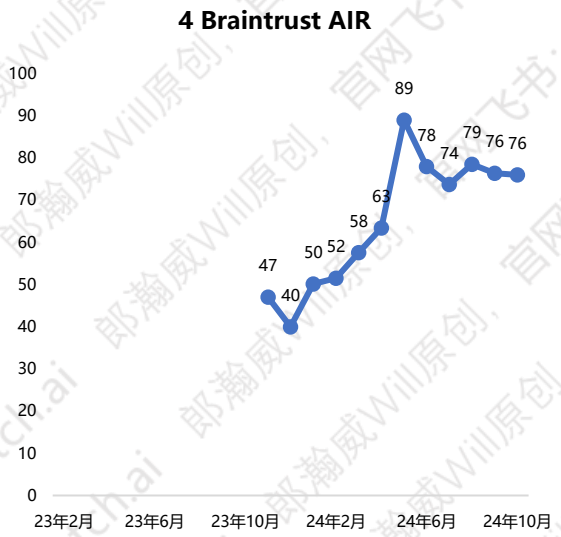
数据来源：similarweb 单位：万visit

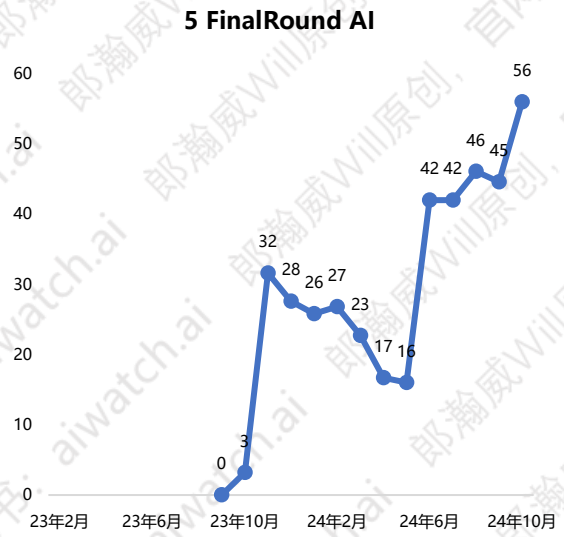
招聘- Top8

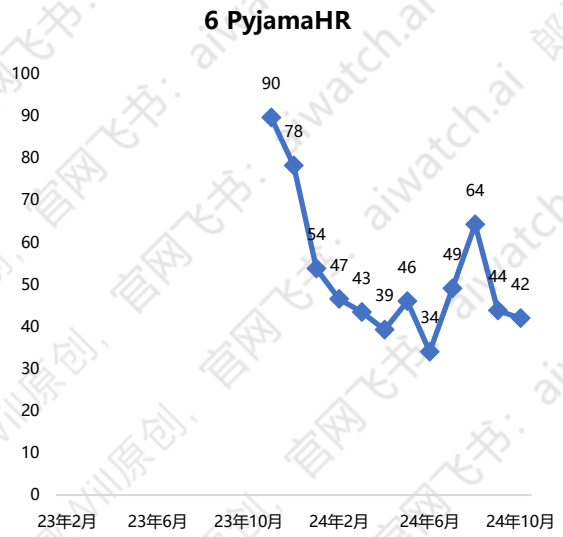


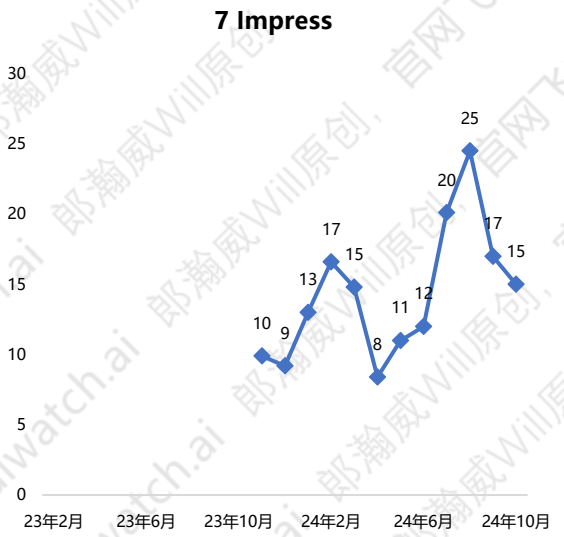


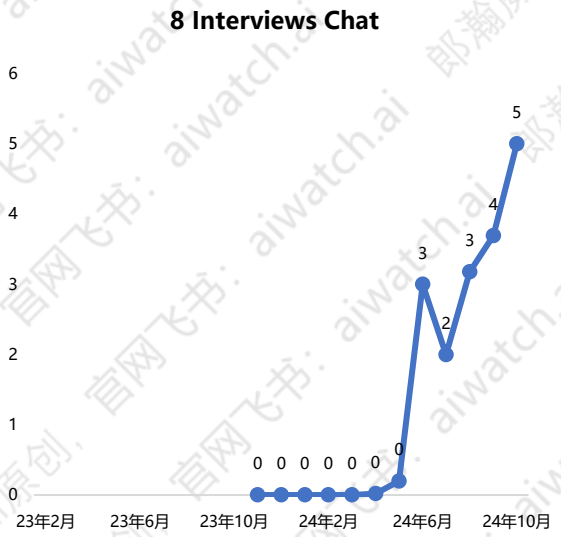












数据来源：similarweb 单位：万visit

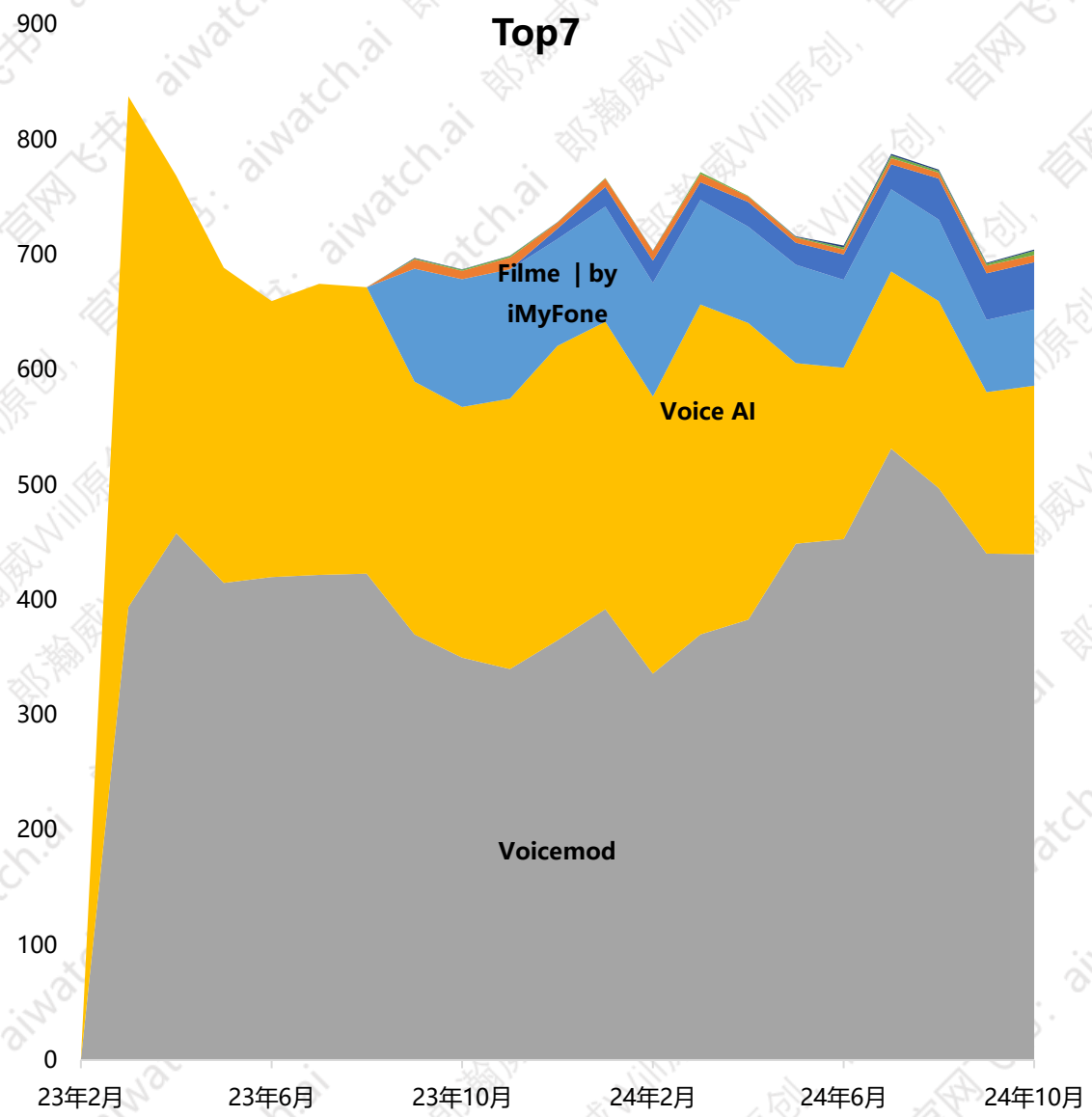
郎瀚威Will原创，官网飞书：aiwatch.ai

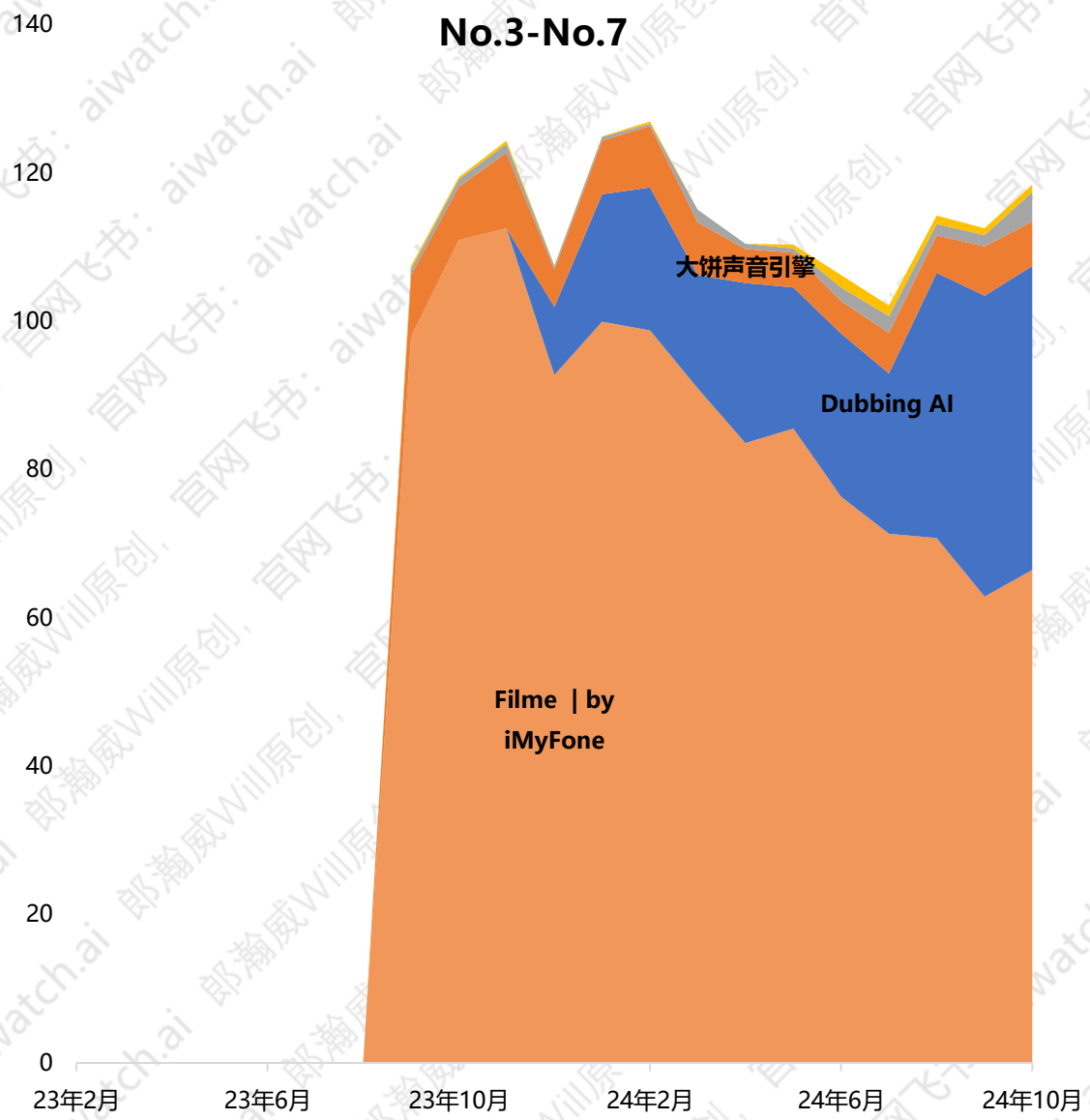
变声

变声

官网飞书：aiwatch.ai 郎瀚威Will原创

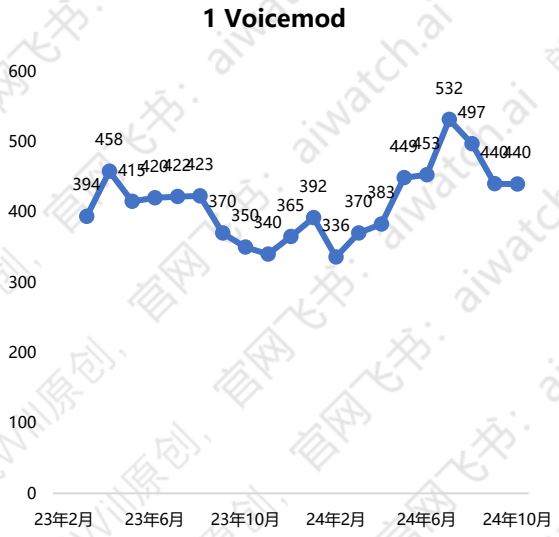
变声- 网页流量趋势 10月总量：704.8万

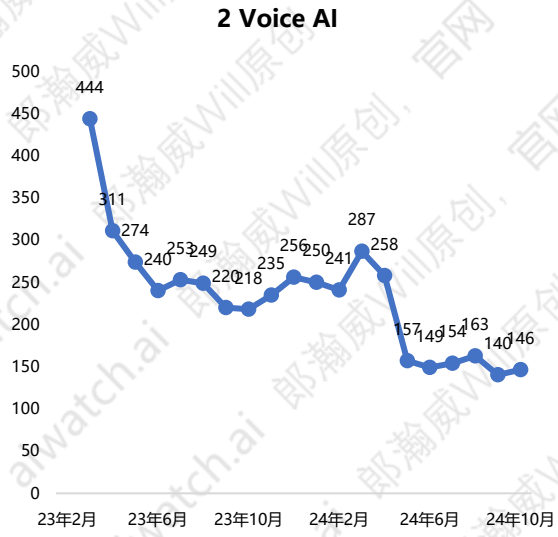


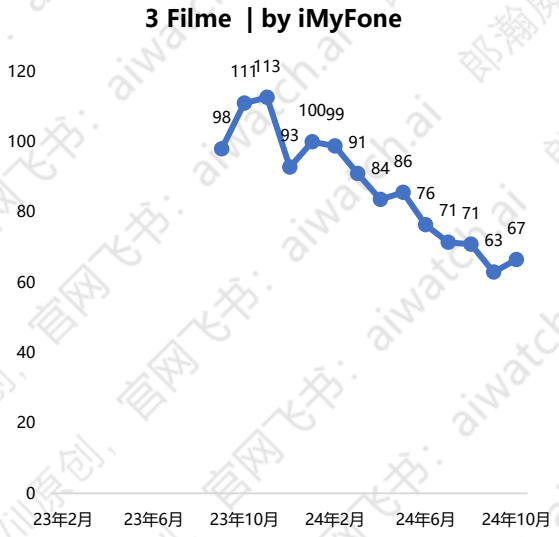


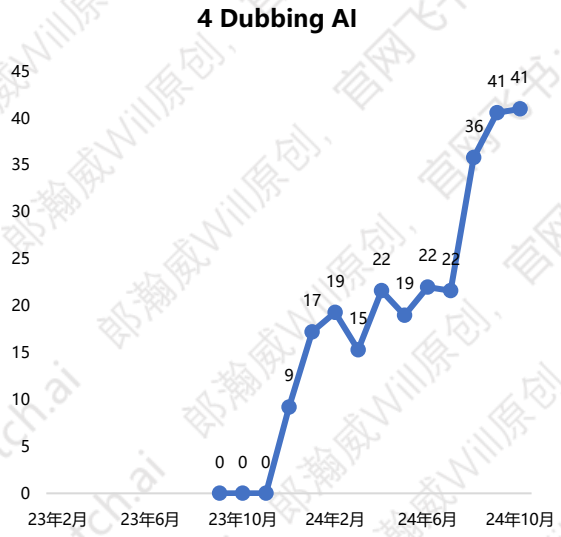
数据来源：similarweb 单位：万visit

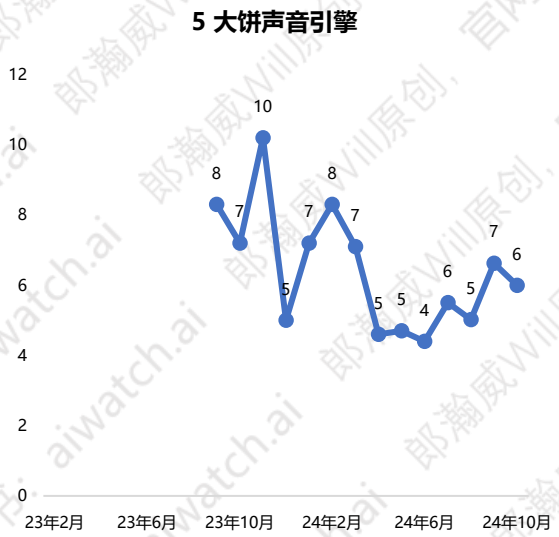
变声- Top7

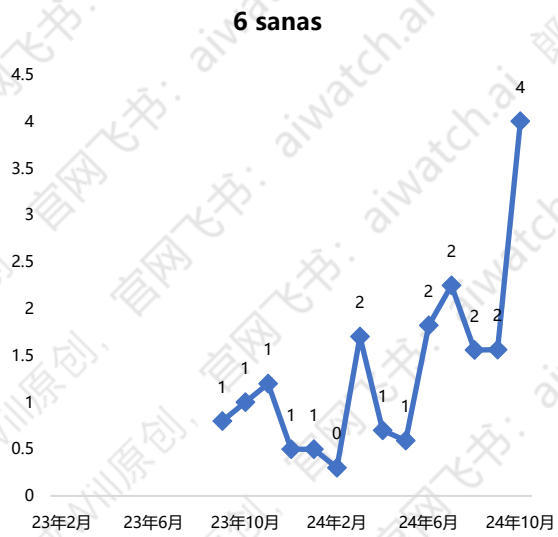


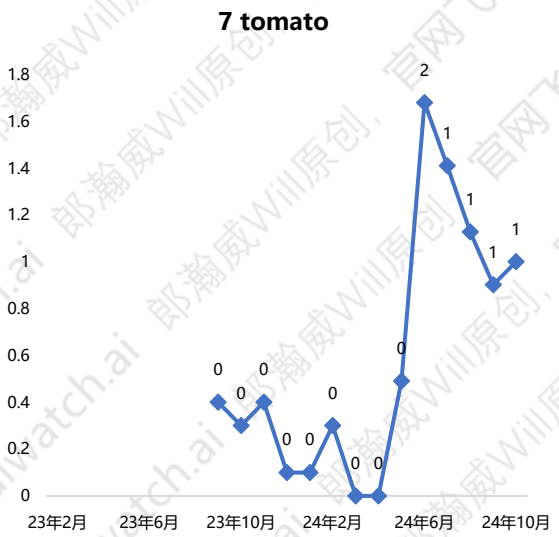










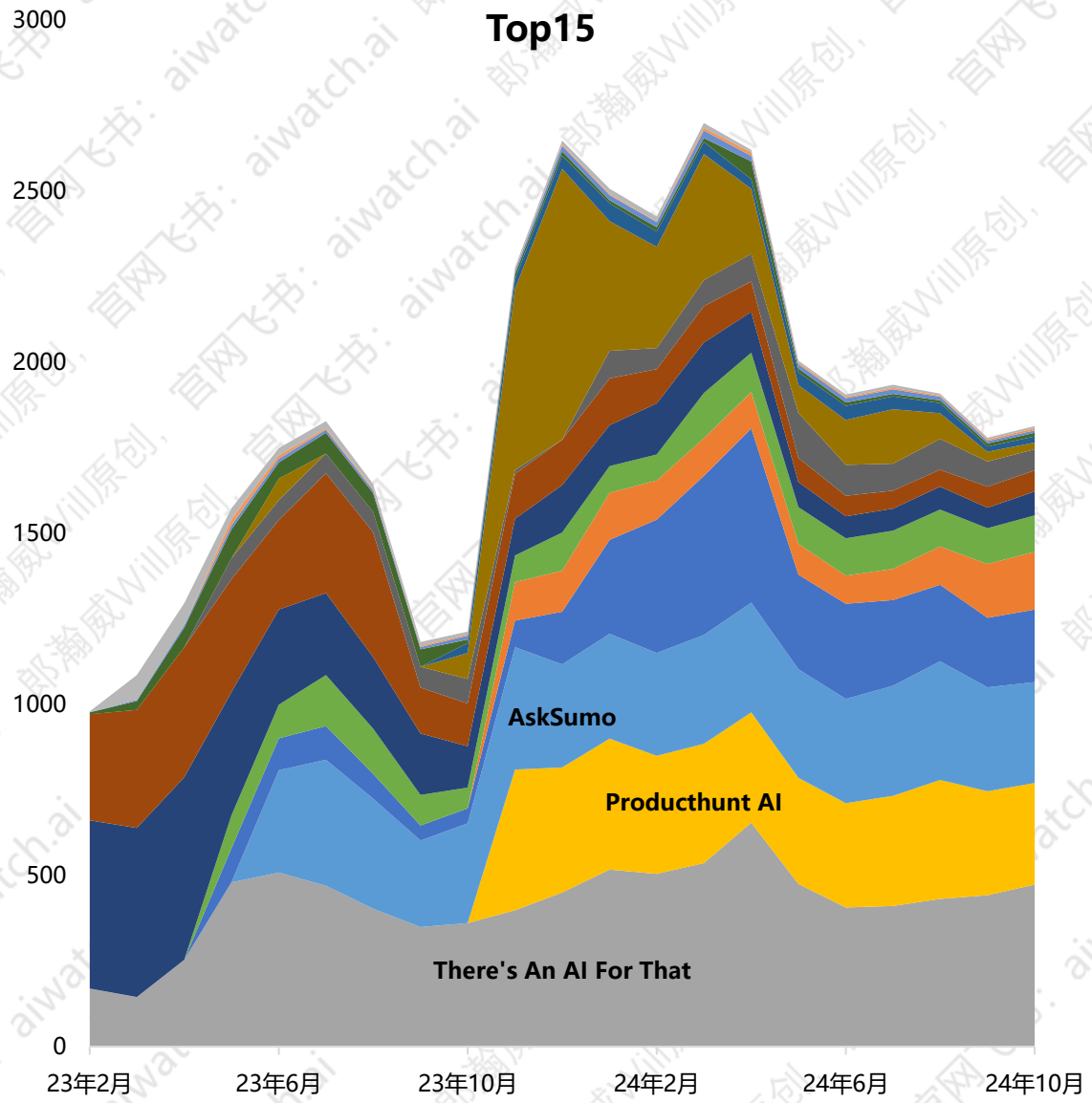


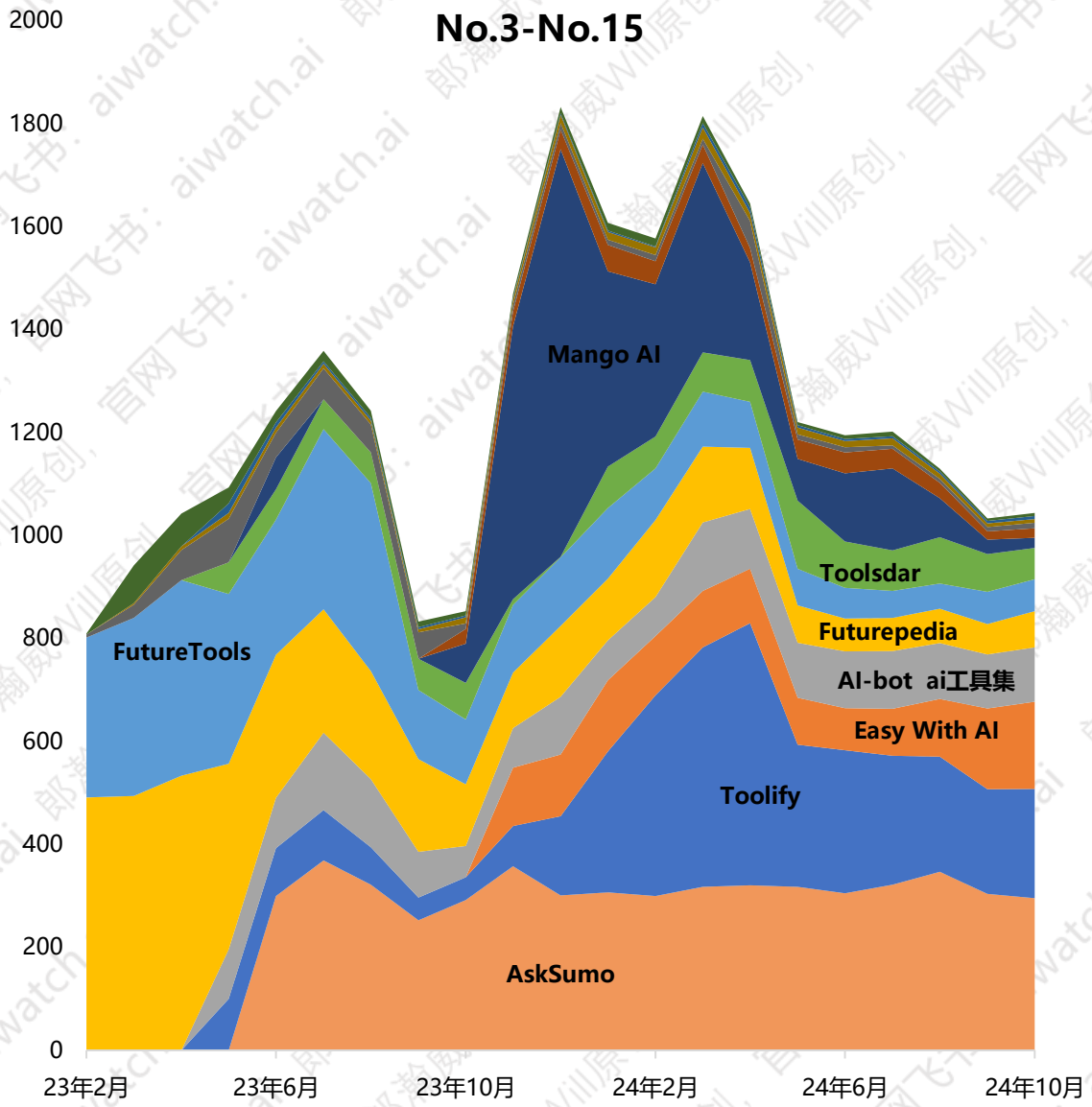
数据来源：similarweb 单位：万visit

导航网站

导航网站

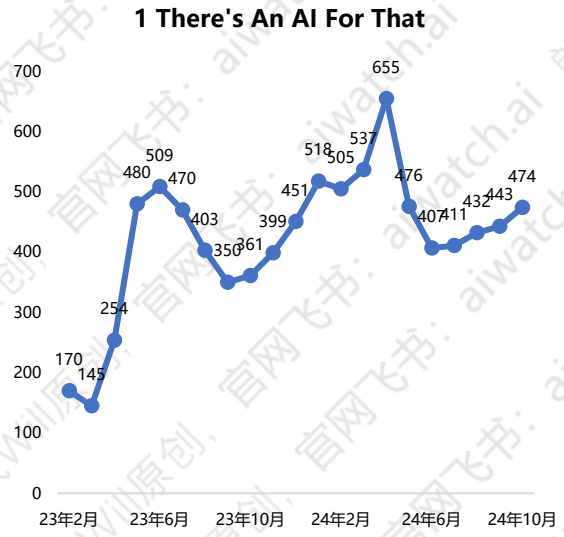
导航网站- 网页流量趋势 10月总量：1812.8万

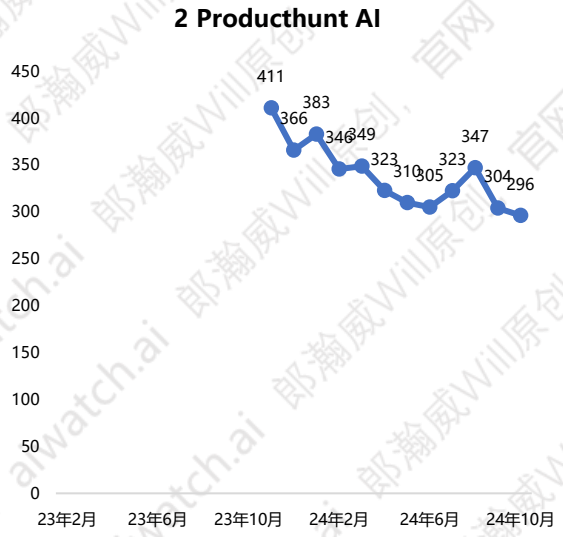


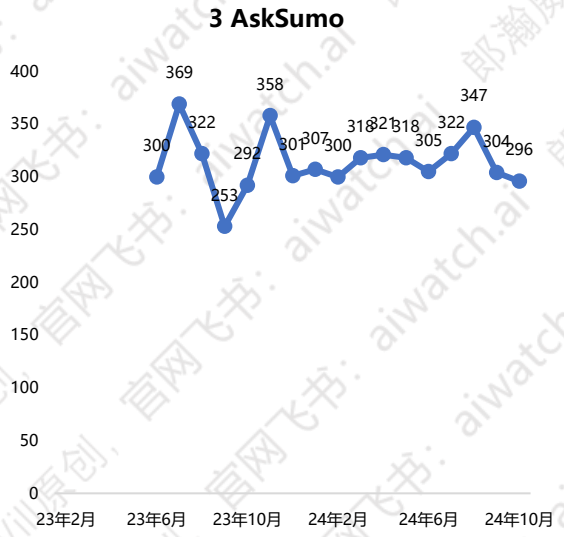


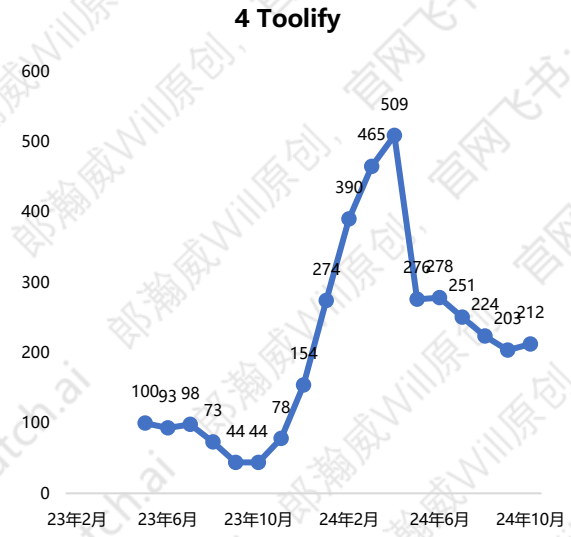
数据来源：similarweb 单位：万visit

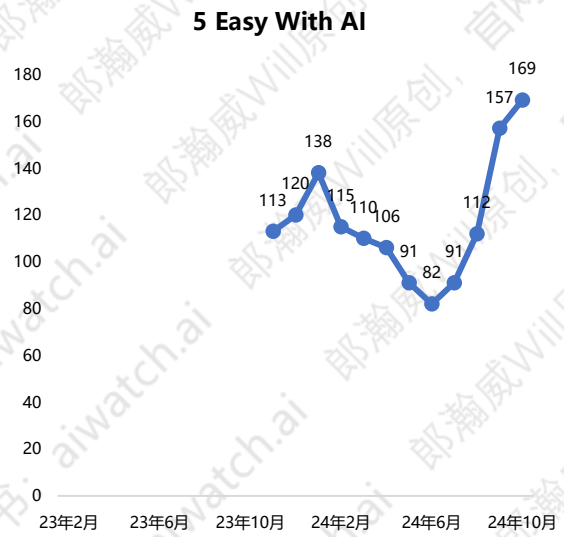
导航网站- Top8

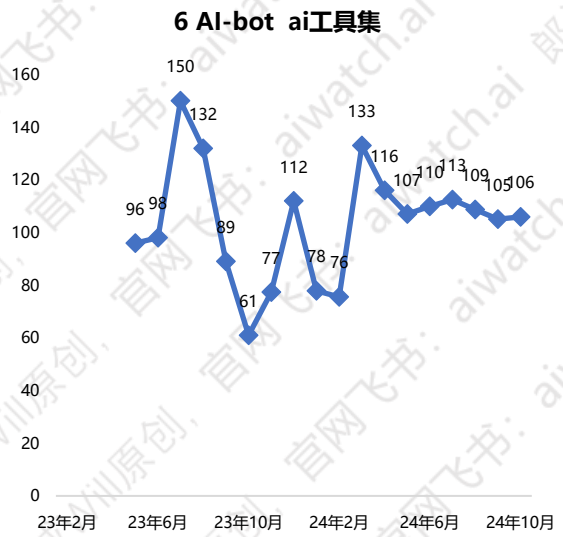


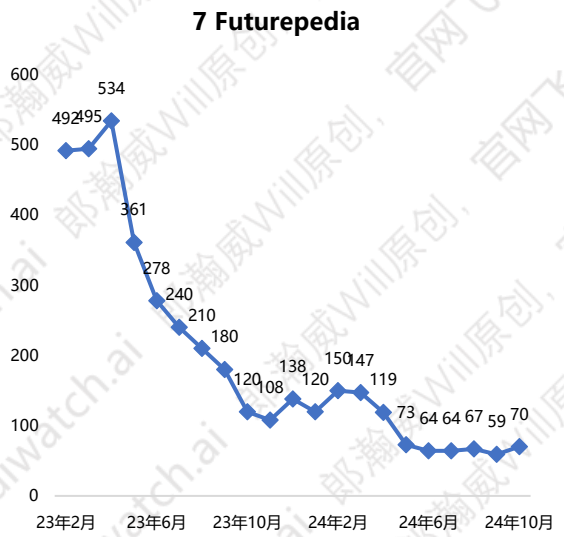


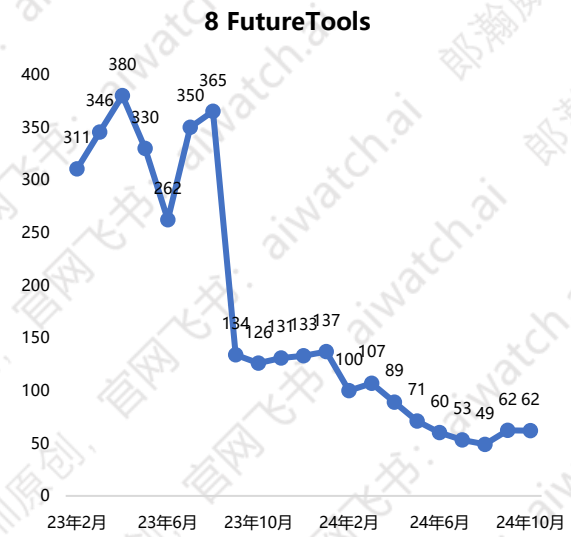












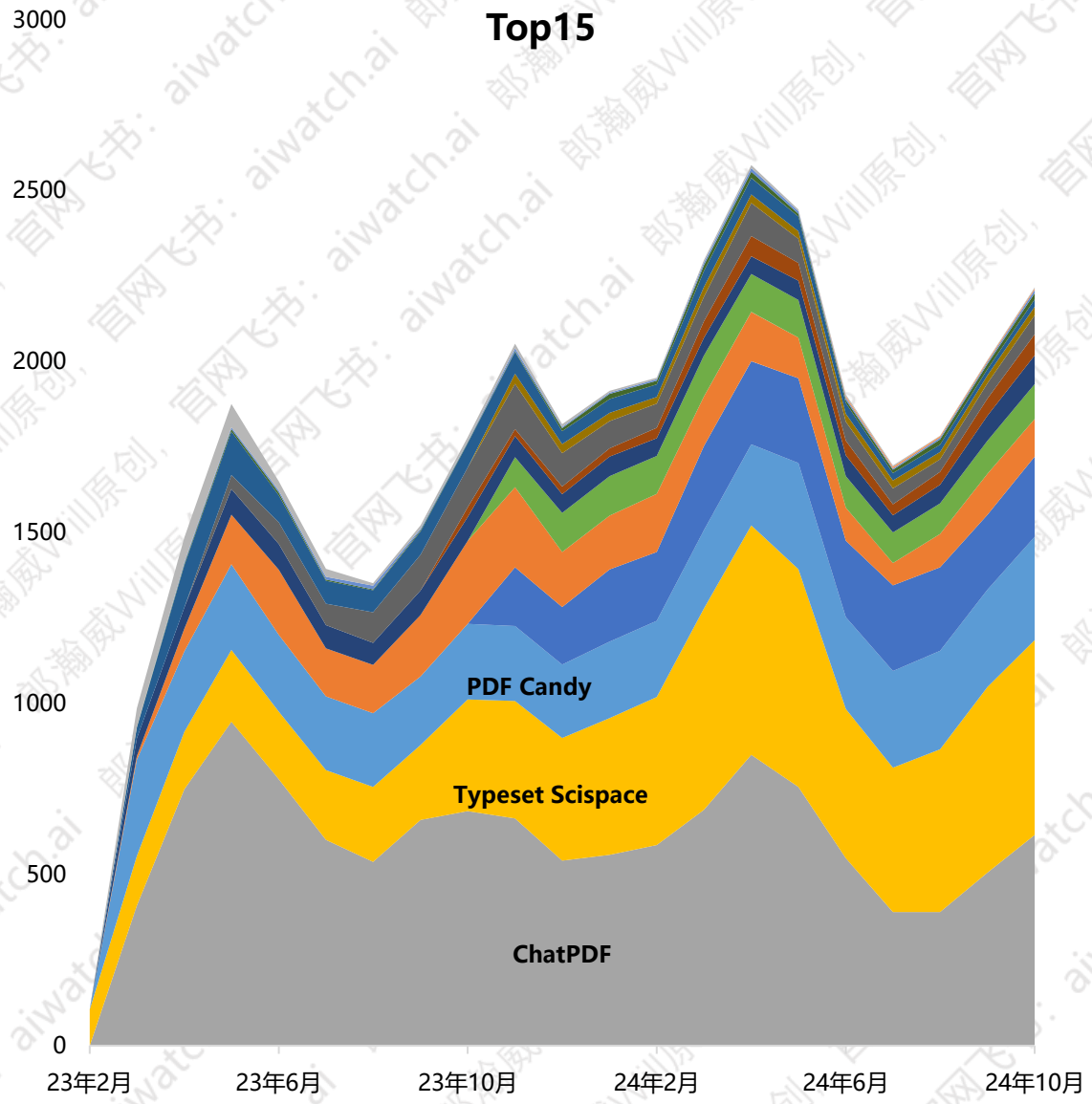
数据来源：similarweb 单位：万visit

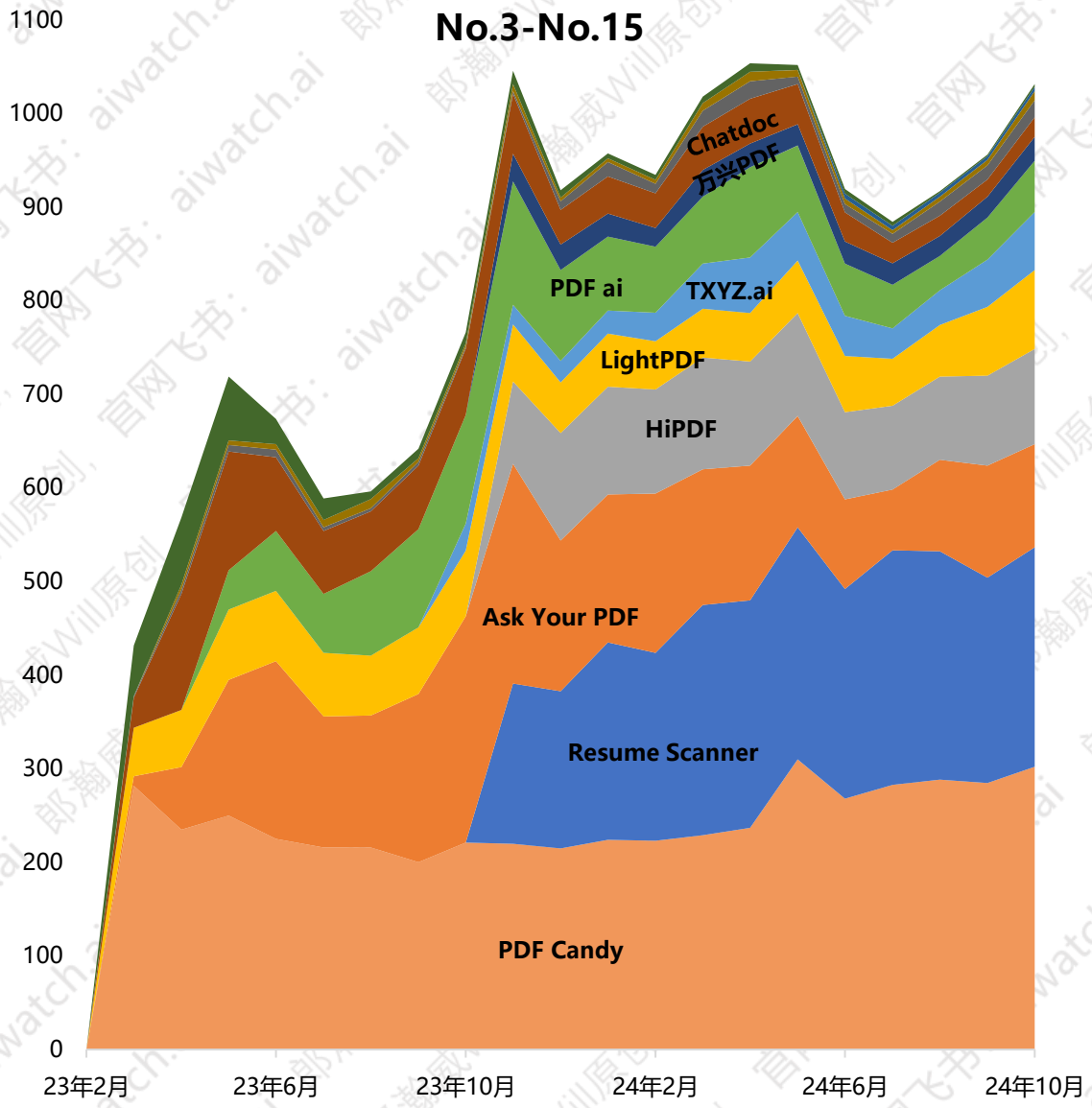
郎瀚威Will原创，官网飞书：aiwatch.ai

PDF

PDF

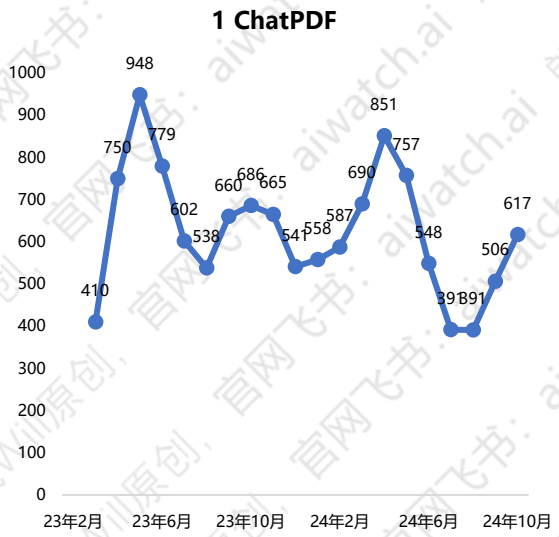
PDF- 网页流量趋势 10月总量：2214.8万

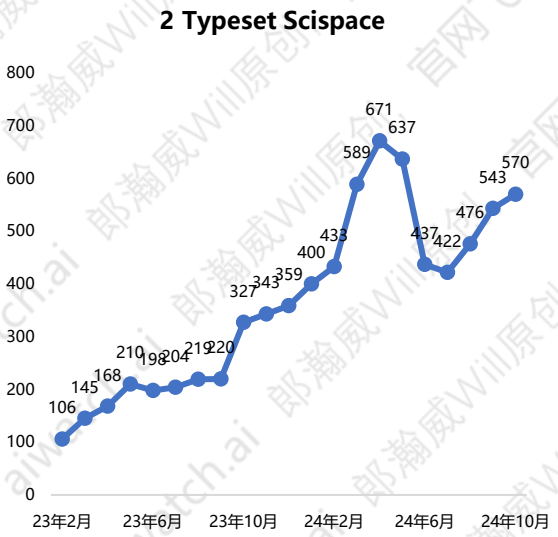


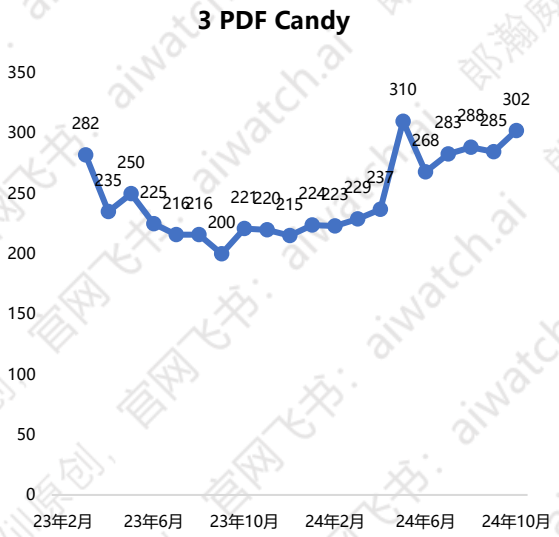


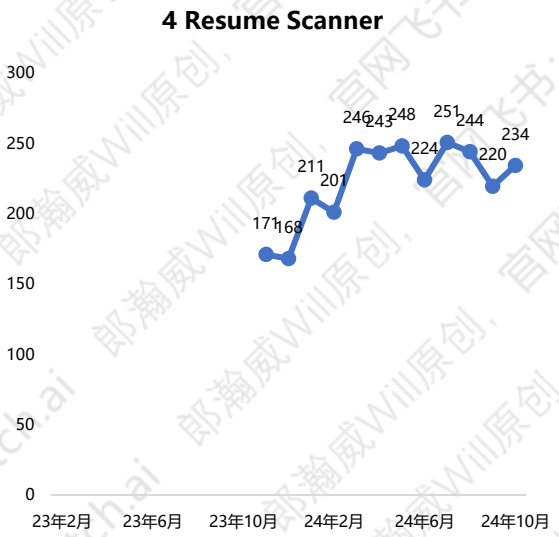
数据来源：similarweb 单位：万visit

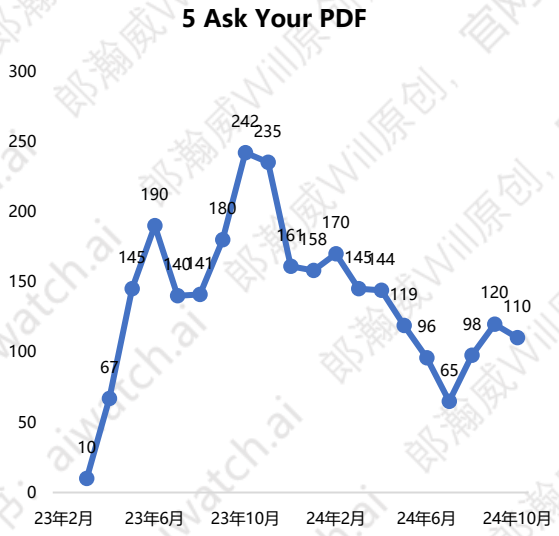
PDF- Top8

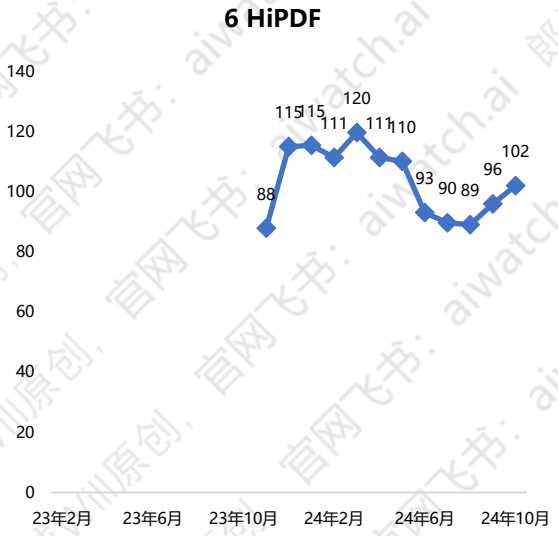


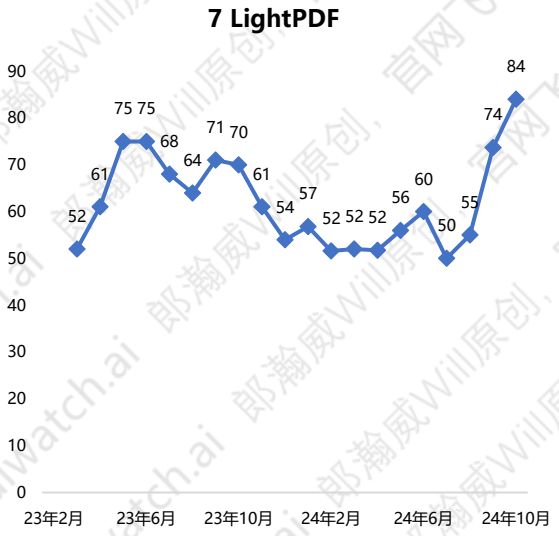


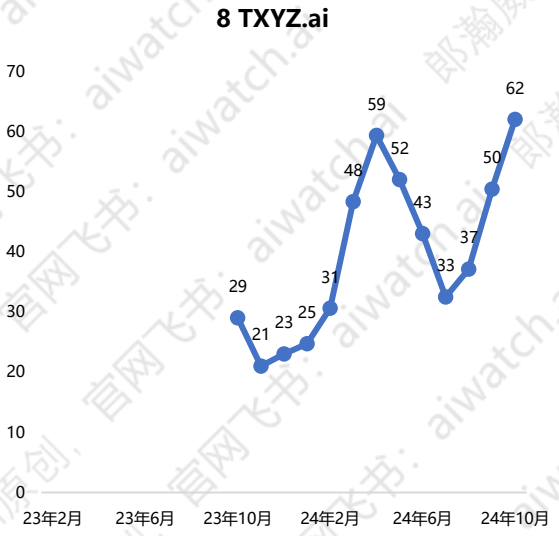










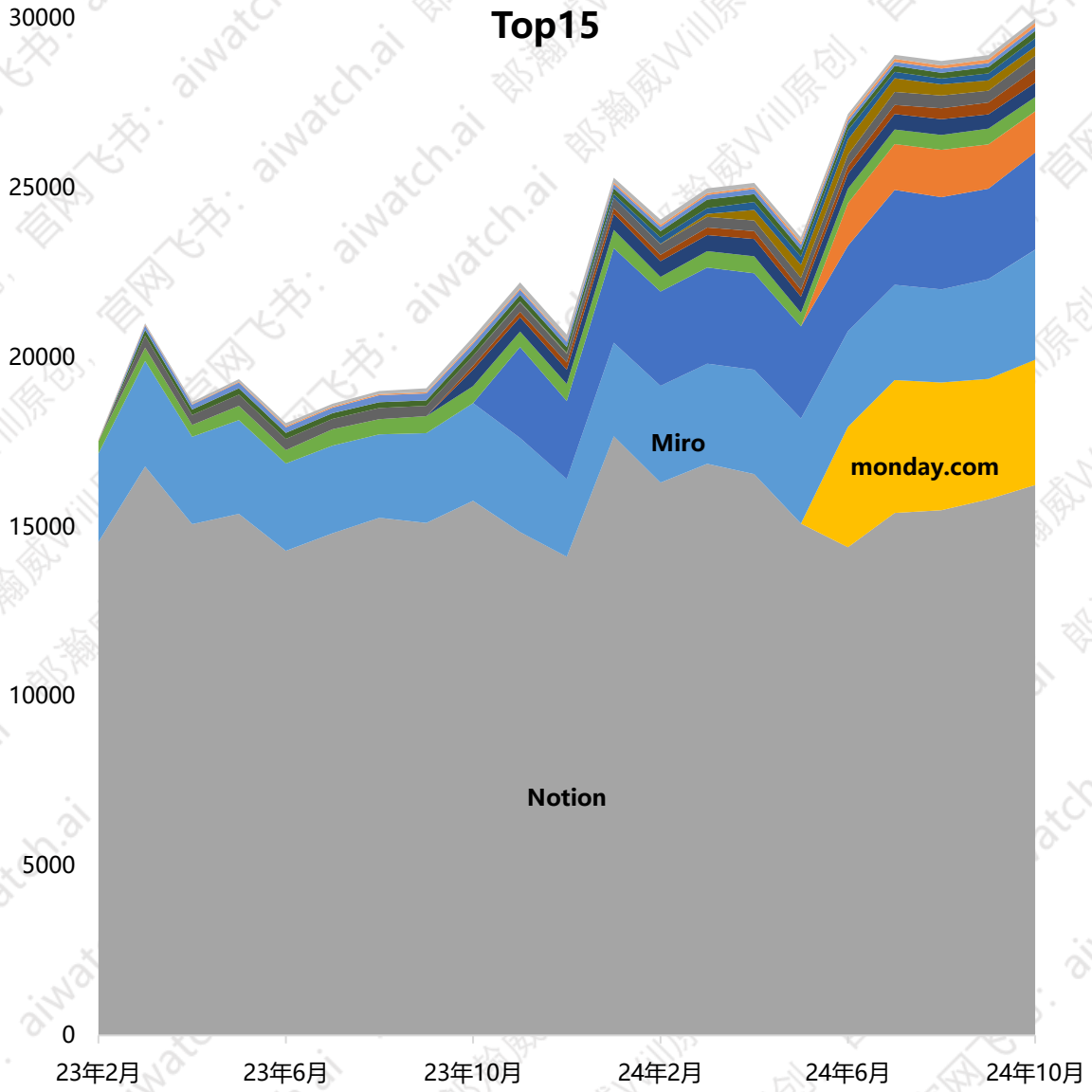


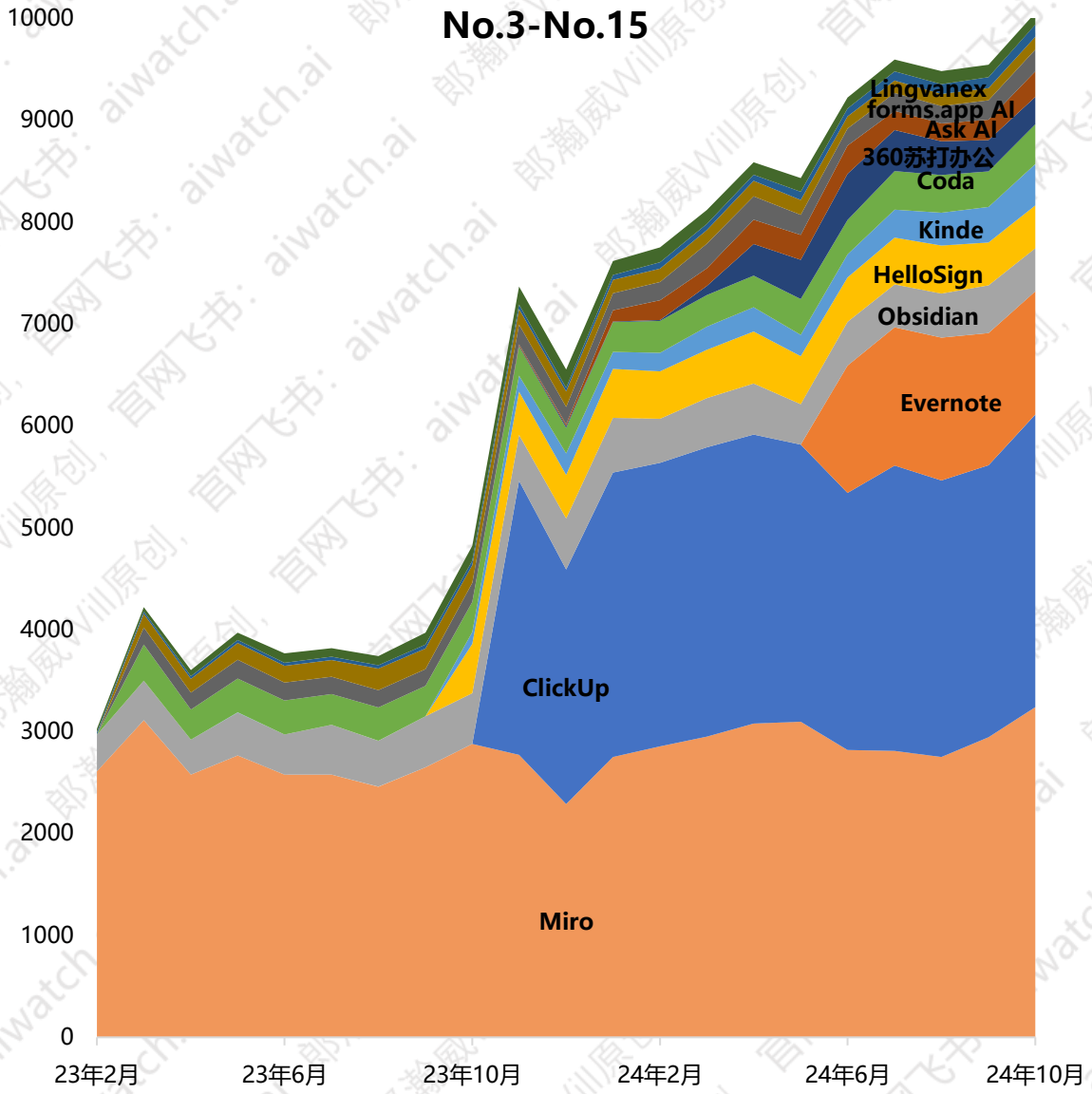
数据来源：similarweb 单位：万visit

生产力

生产力

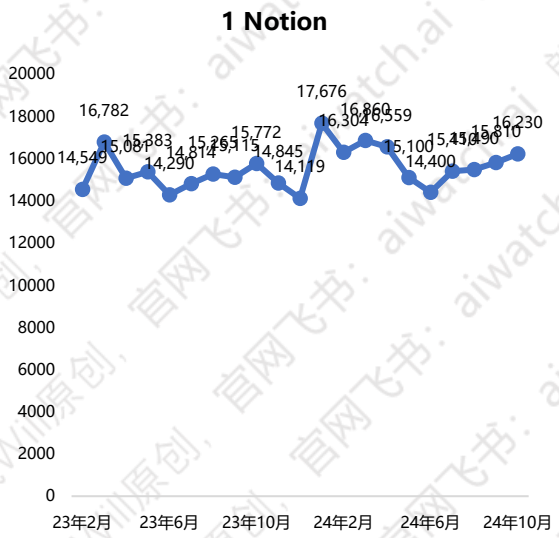
生产力- 网页流量趋势 10月总量：2.995亿

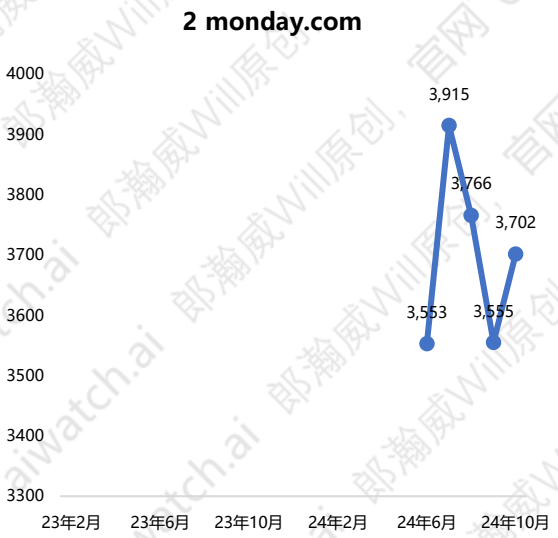


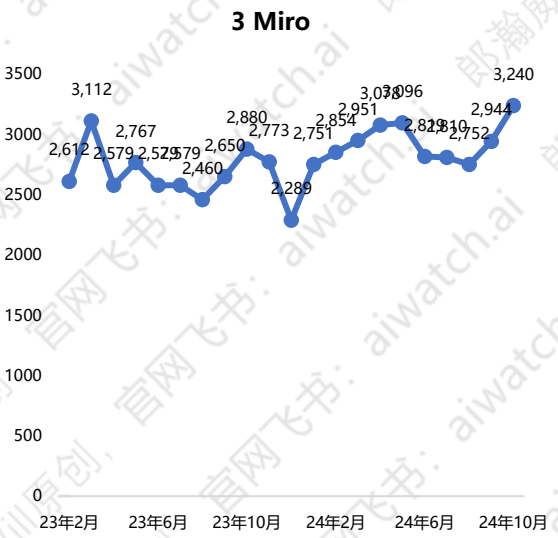


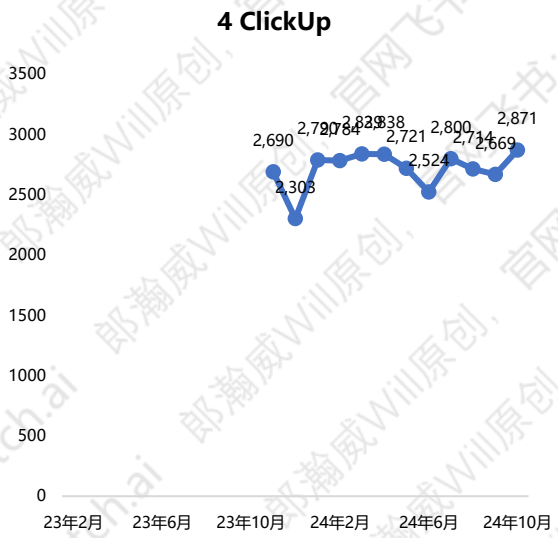
数据来源：similarweb 单位：万visit

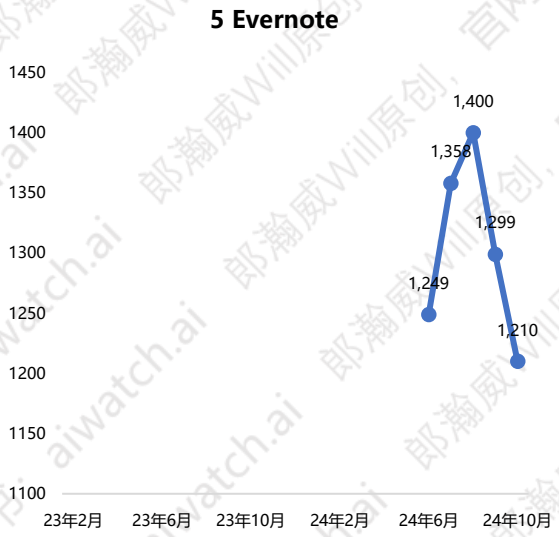
生产力- Top8

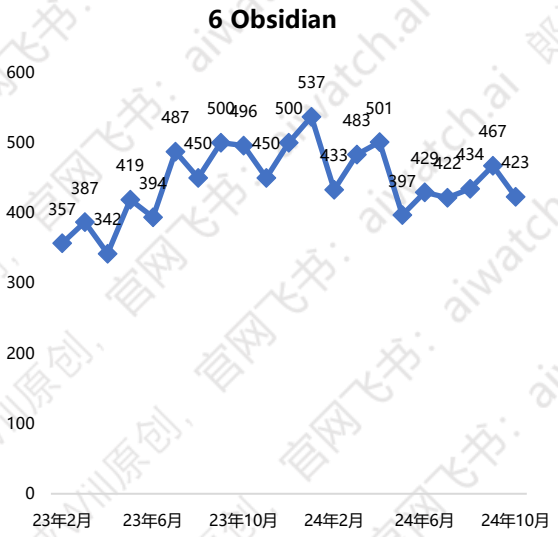


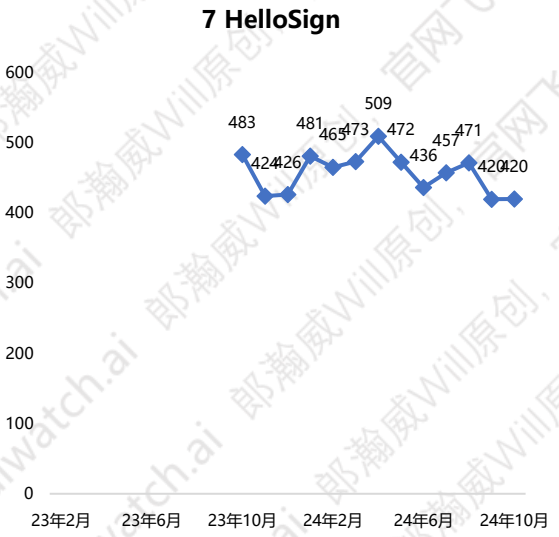












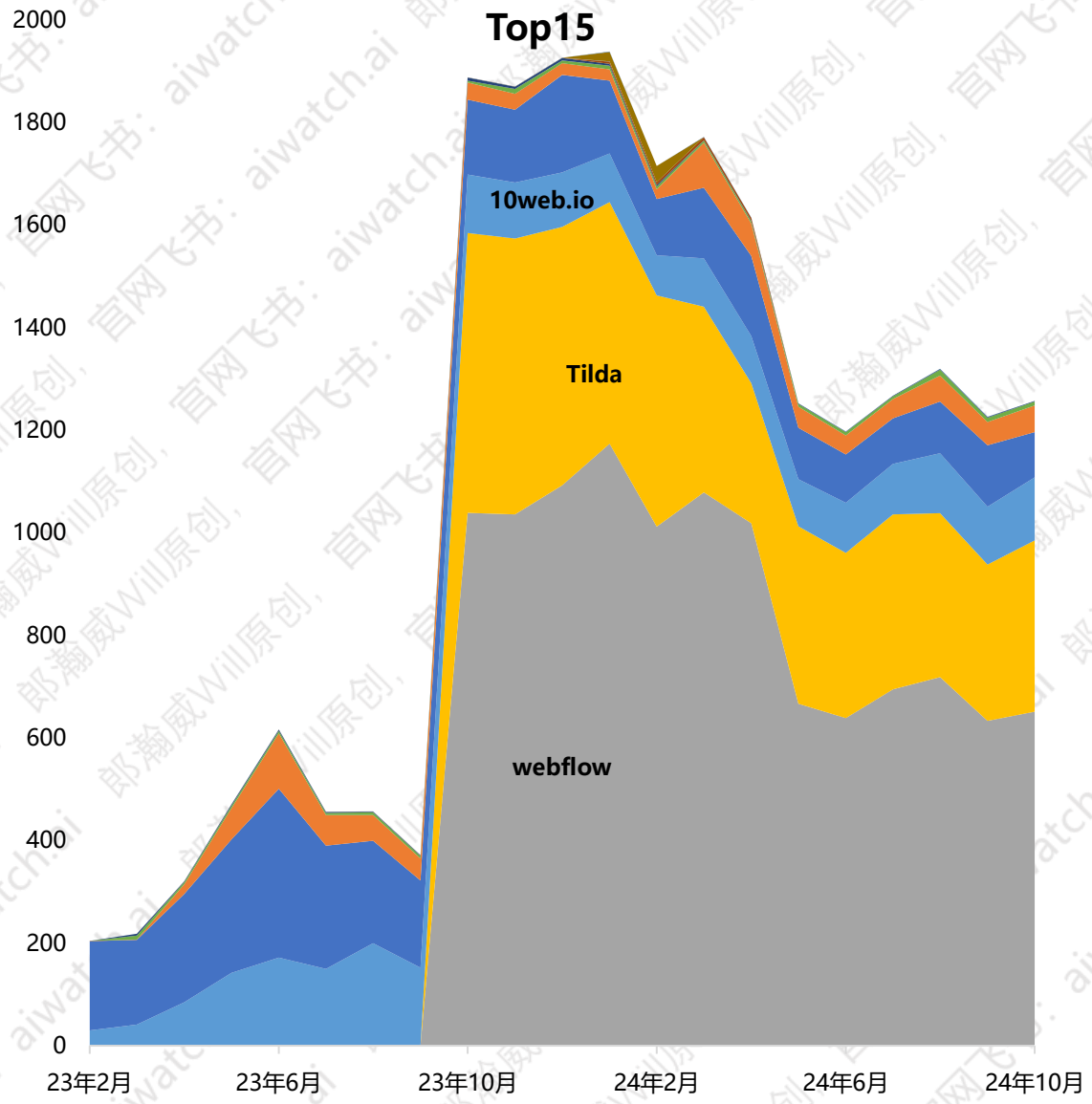
数据来源：similarweb 单位：万visit

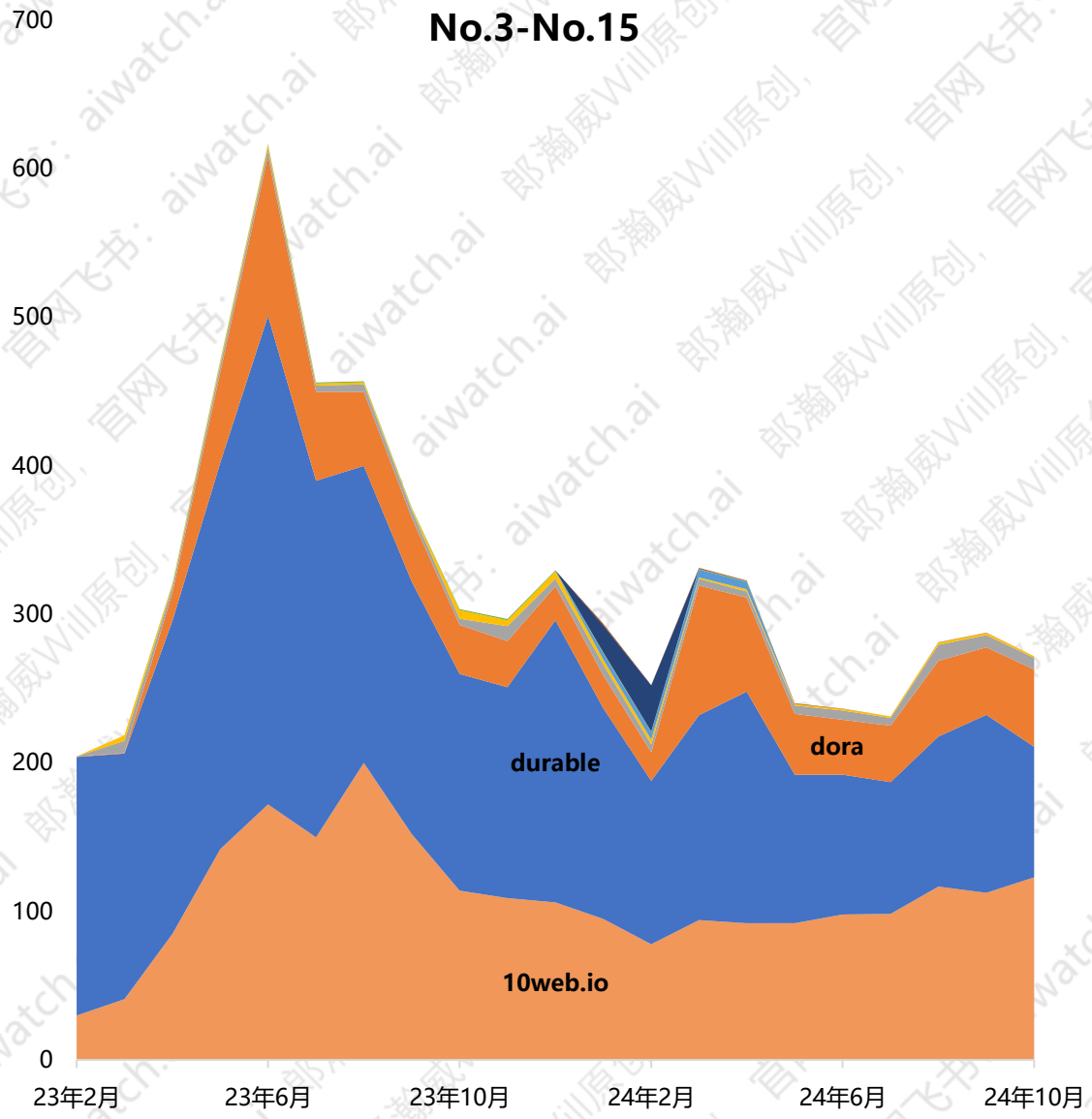
建站

建站

数据来源：

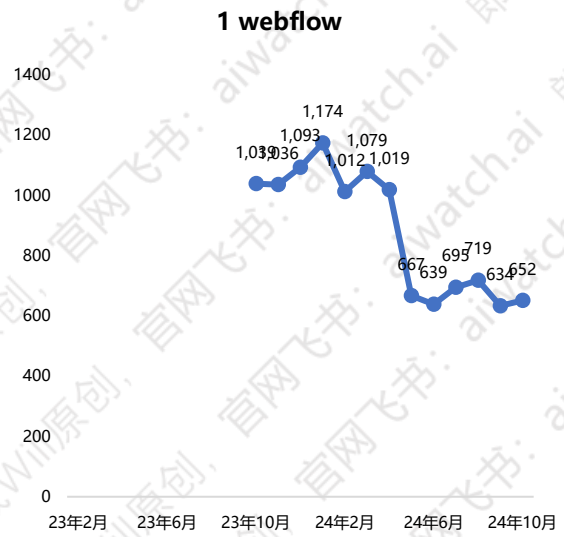
建站- 网页流量趋势 10月总量：1257.3万

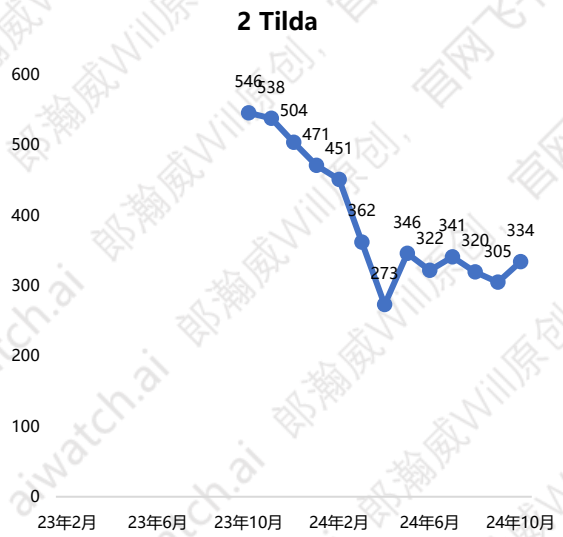


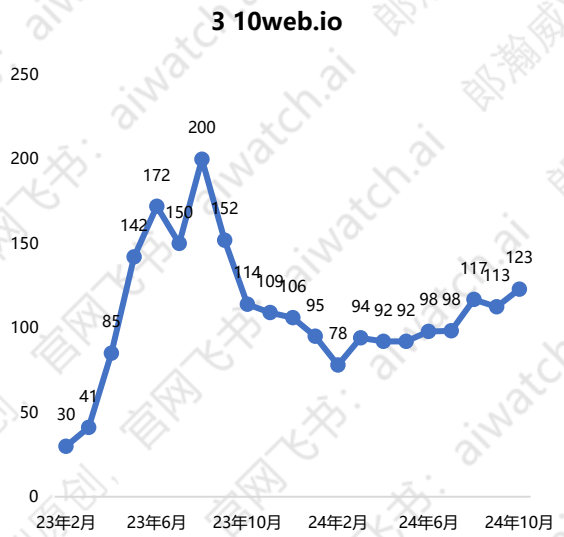


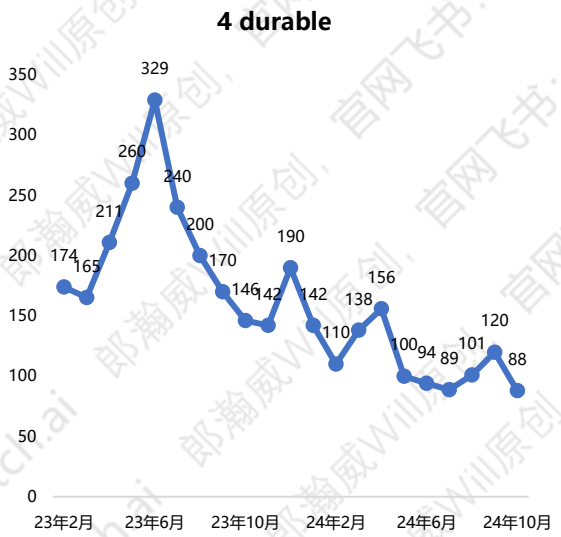
数据来源：similarweb 单位：万visit

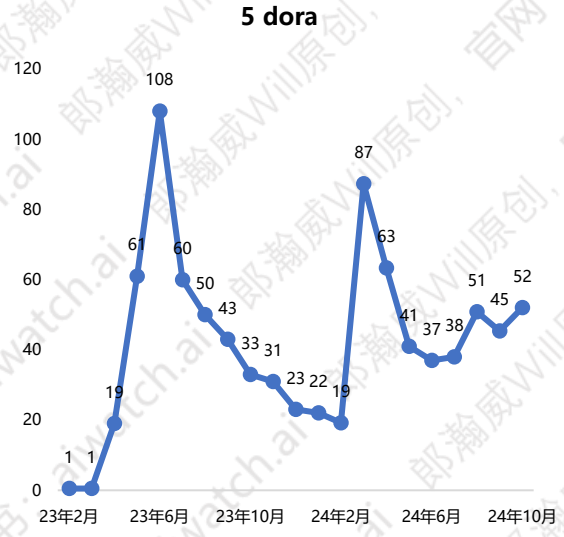
建站- Top8

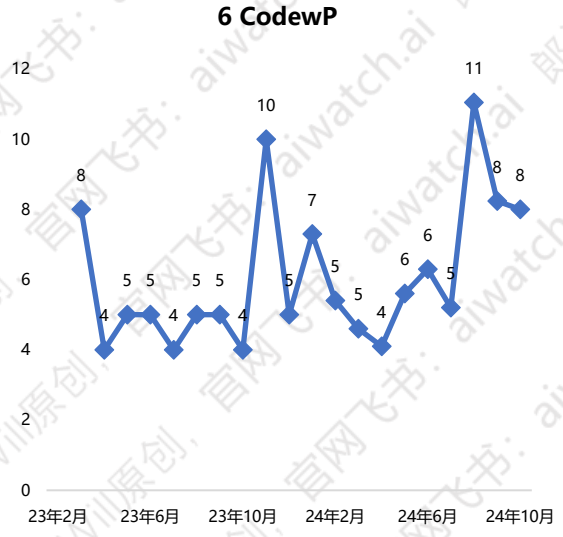


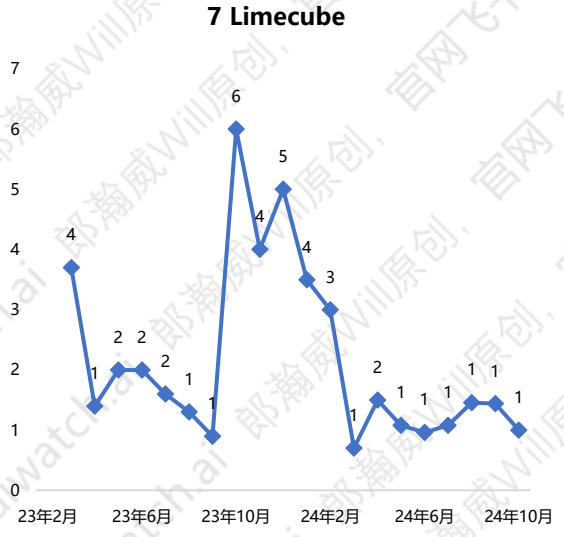


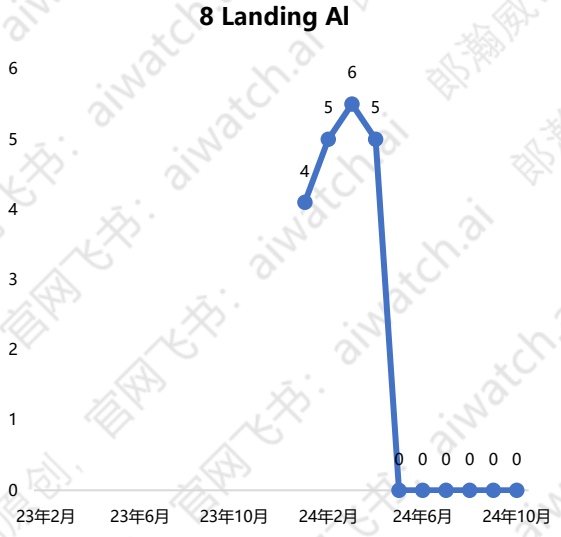












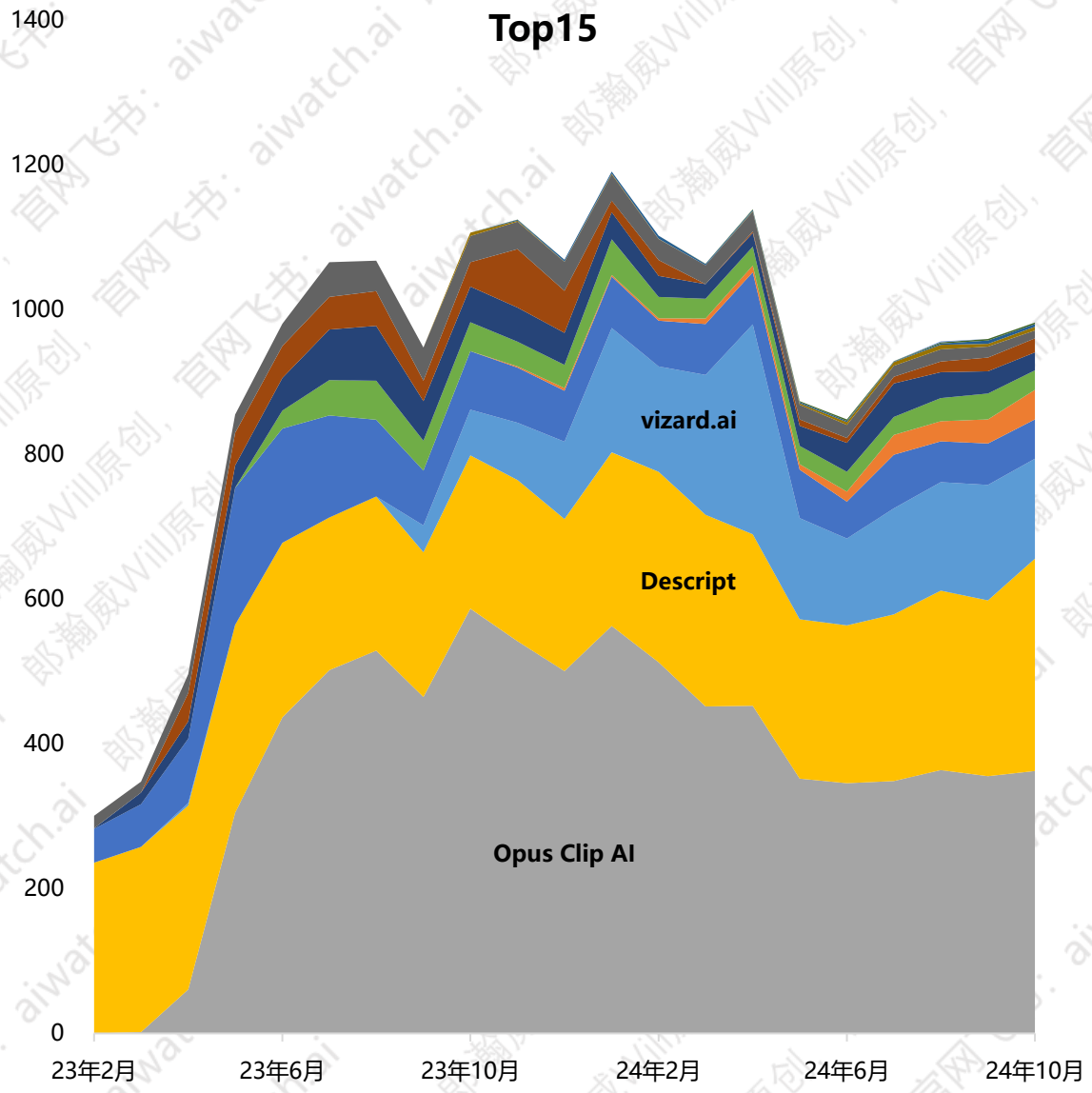
数据来源：similarweb 单位：万visit

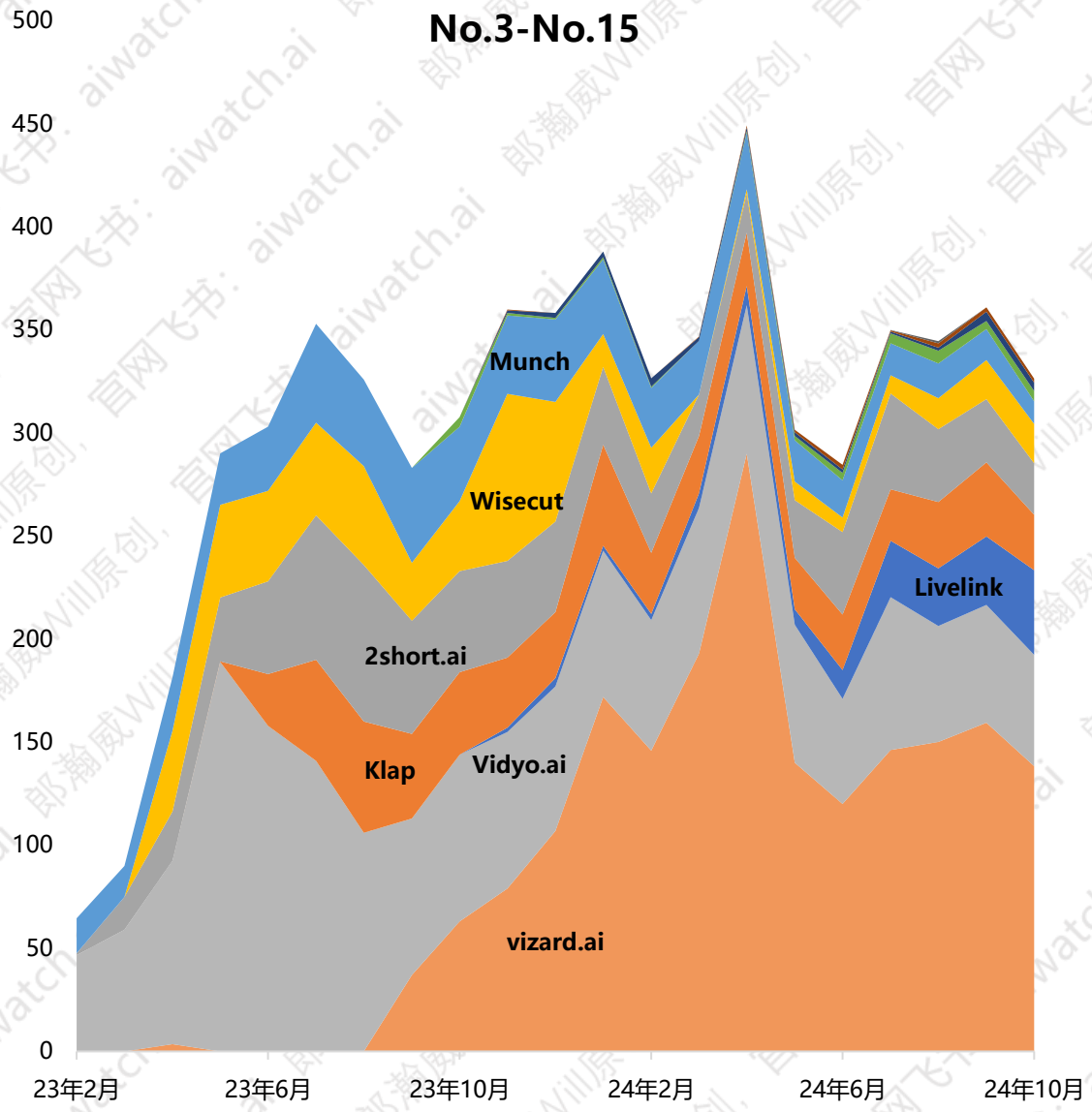
郎瀚威Will原创，官网飞书：aiwatch.ai

长视频切片

长视频切片

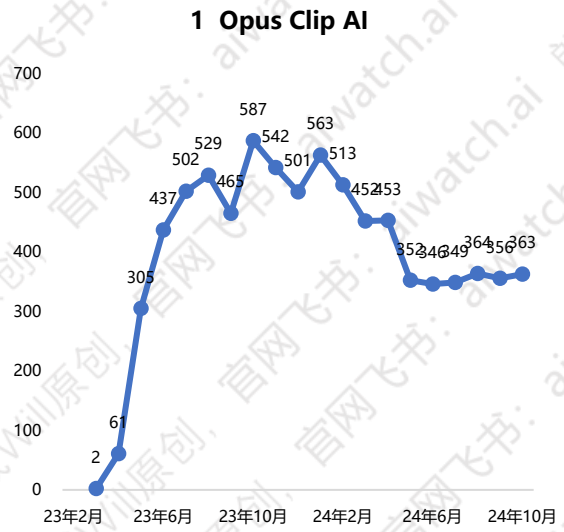
长视频切片 网页流量趋势 10月总量：982万

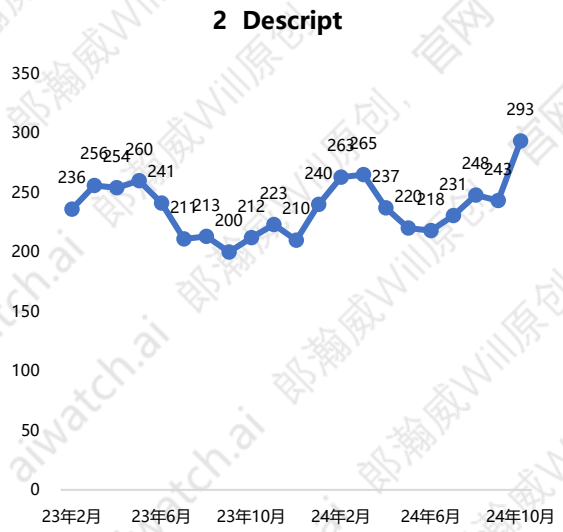


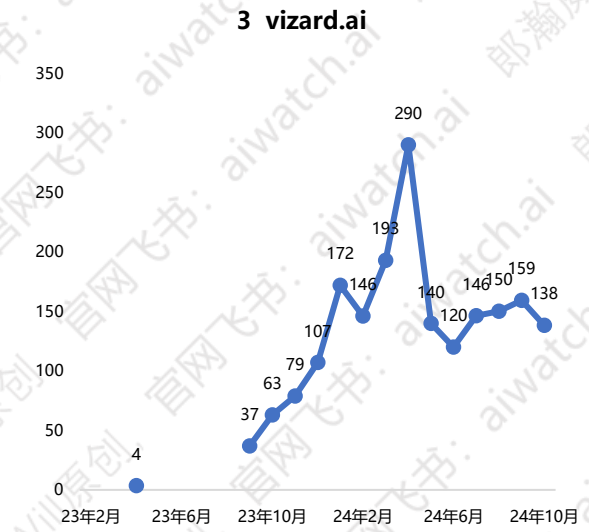


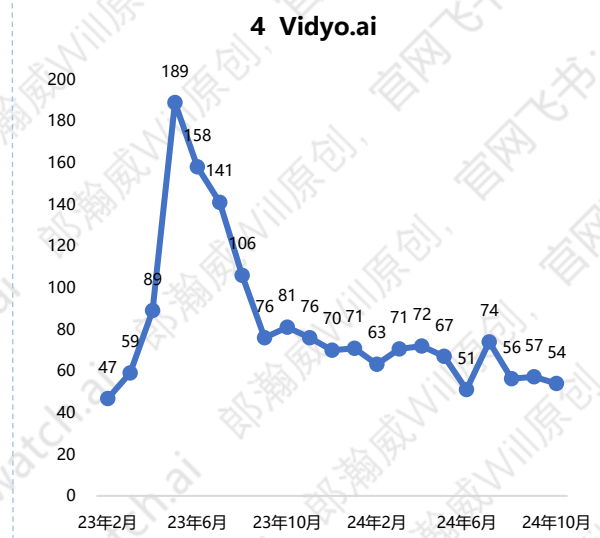
数据来源：similarweb 单位：万visit

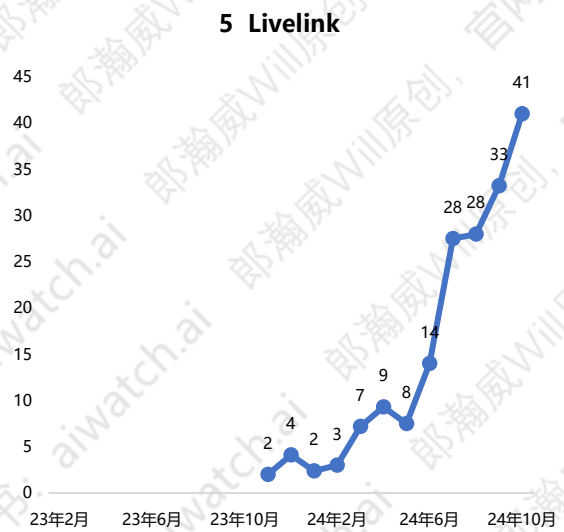
长视频切片 No.1-No.8

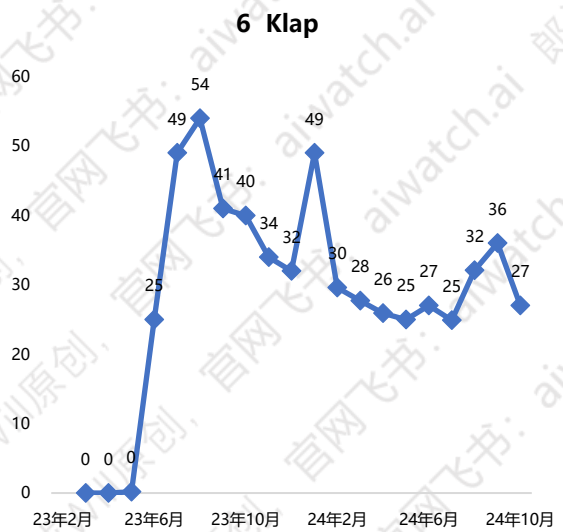


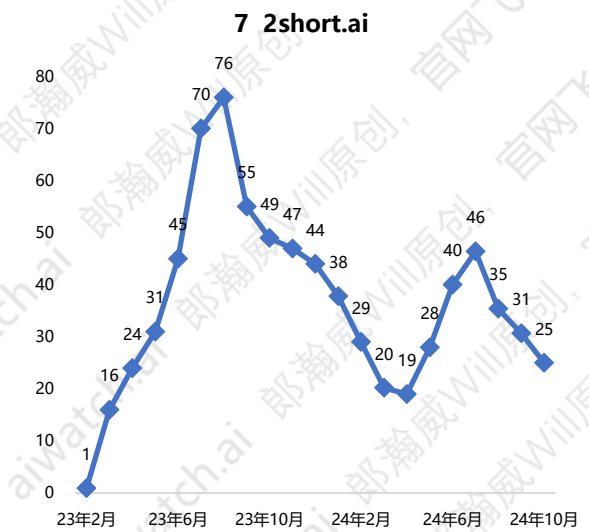


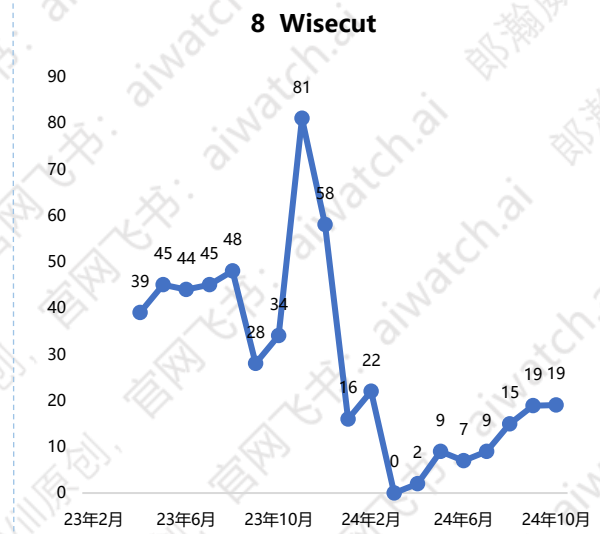












数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

出海

出海

出海 - Takeaway

1. 2024年10月，出海Top15网站的总访问量达到1.5亿次，显示出显著的用户规模增长。
2. 排名前三的Gauth、Fotor和Crush On，分别实现了稳定的访问量，Gauth以1785万次访问位居第一，Crush On增速显著。
3. 增速方面，Monica和Sider分别以247%和197%的年度增长率位居前列，显示出强劲的发展潜力。
4. 新兴网站中，例如Sea Art AI和Monica等，访问量增长迅速，特别是在AI相关技术驱动下的服务，具有突破性潜力。
5. 从流量分布来看，流量集中度有所缓解，中后位网站逐渐崛起，市场格局更趋多元化。
6. 未来可以关注图像生成和AI工具类产品的进一步表现，它们或将在流量和商业模式上取得双赢。

数据来源：similarweb 单位：万visit

出海 - Top15

➢ **Top15 总网页流量：1.5亿次visit**

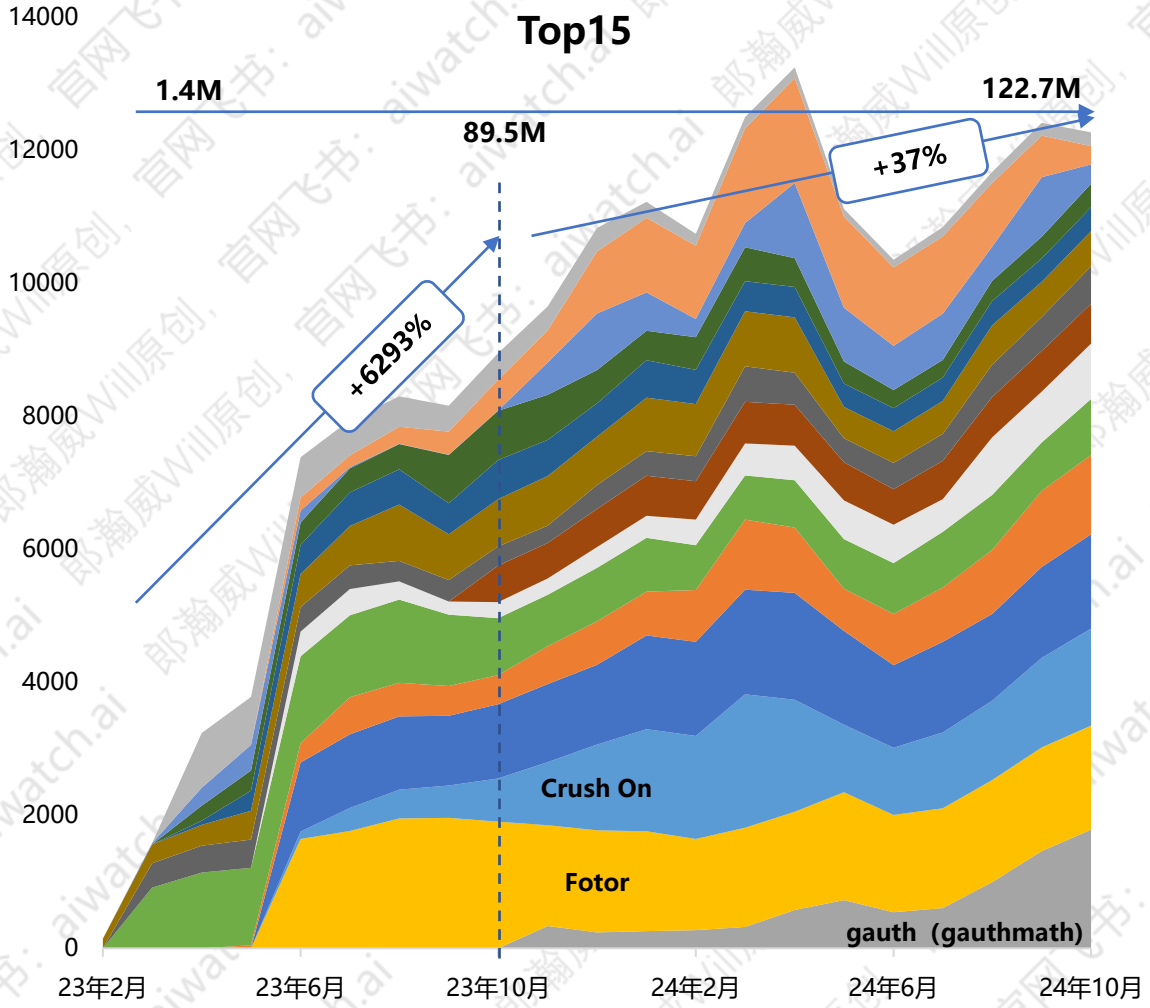
序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化
1	Gauth		1,785	-
2	Fotor	1,906	1,561	-18%
3	Crush On	650	1,459	124%
4	Cutout pro	1,115	1,421	27%
5	KLING AI		1,340	-
6	Sea Art AI	438	1,194	173%
7	Hailuo AI		1,145	-
8	PicWish	858	841	-2%
9	Monica	240	832	247%
10	Talkie		714	-
11	Vidu AI		672	-
12	Media.io	546	599	10%
13	Sider	195	579	197%
14	Openart	290	566	95%
15	PixAI	714	525	-26%

数据来源：similarweb 单位：万visit

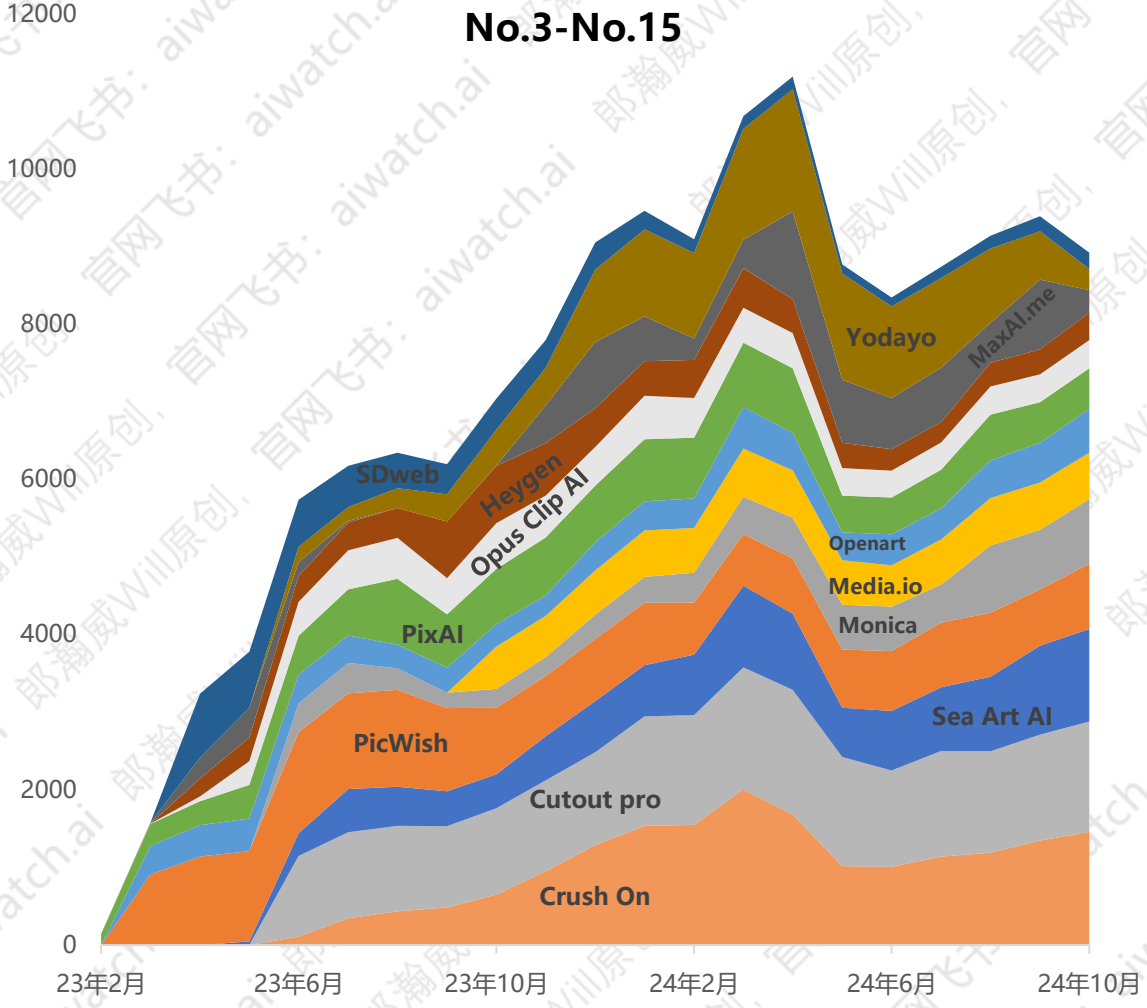
郎瀚威Will原创，官网飞书：aiwatch.ai

出海 网页流量趋势 10月总量：1.2亿

- Gauth、Fotor和Crush On稳居前三，月访问量均超过1400万。尽管Fotor流量有所下滑，但新晋黑马Crush On的快速增长为头部竞争注入新活力，三者共同引领出海市场发展。



- Cutout pro(1421万)、Sea Art AI(1194万)等产品形成了一个极具竞争力的第二梯队，多个产品保持高速增长，展现出出海赛道的强劲发展潜力。



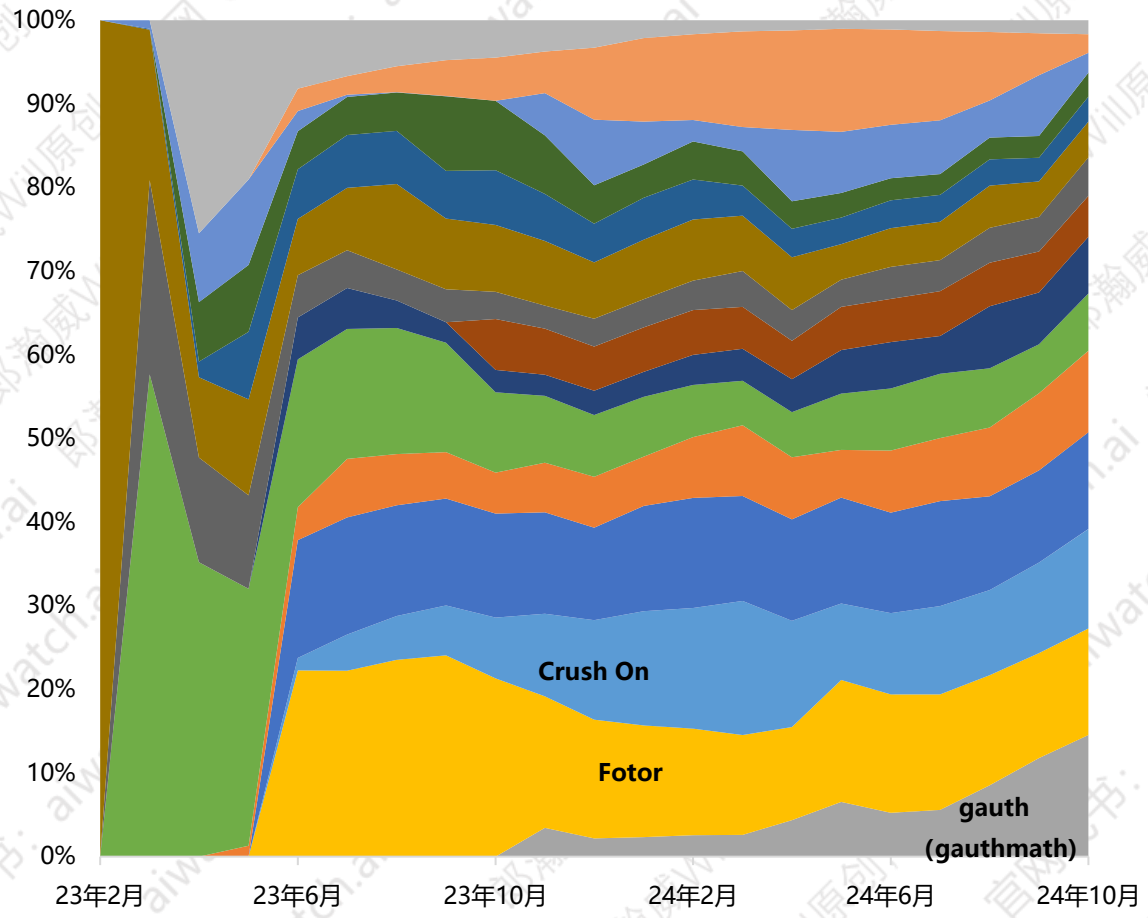
数据来源：similarweb 单位：万visit

出海 2023.2~2024.10 网页流量占比

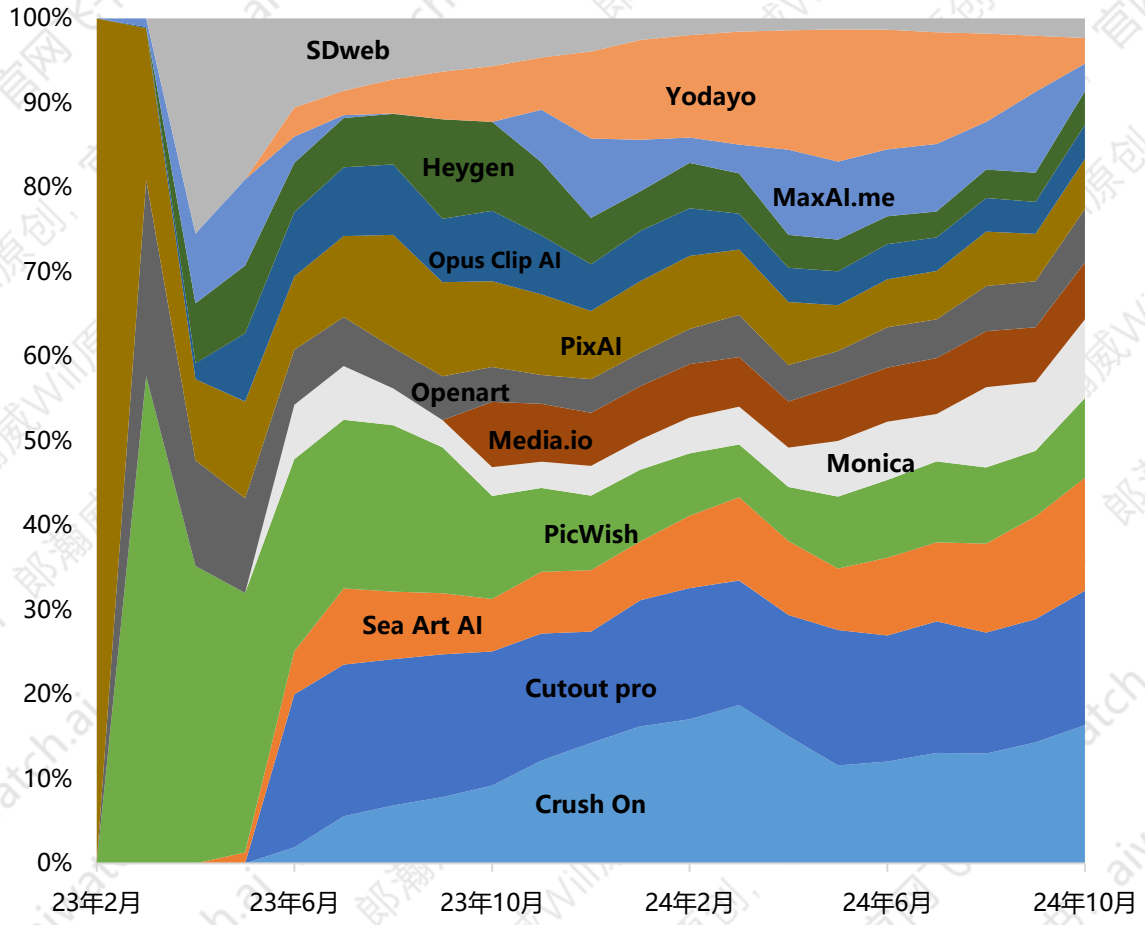
- Top15占比分析：头部企业的市场份额相对稳定，但随着新玩家的不断加入，市场集中度有所下降。Gauth、Fotor的主导地位开始受到挑战，市场竞争更趋白热化。

- 3-15名占比分析：第二梯队的竞争格局更加动态，Monica、Sea Art AI、Sider等产品均实现了翻倍增长，而PicWish、PixAI等老牌产品则面临份额下滑的压力，反映出市场创新迭代加速。

Top15占比



No.3-No.15占比



数据来源：similarweb 单位：万visit

字节

字节

字节 - Top15

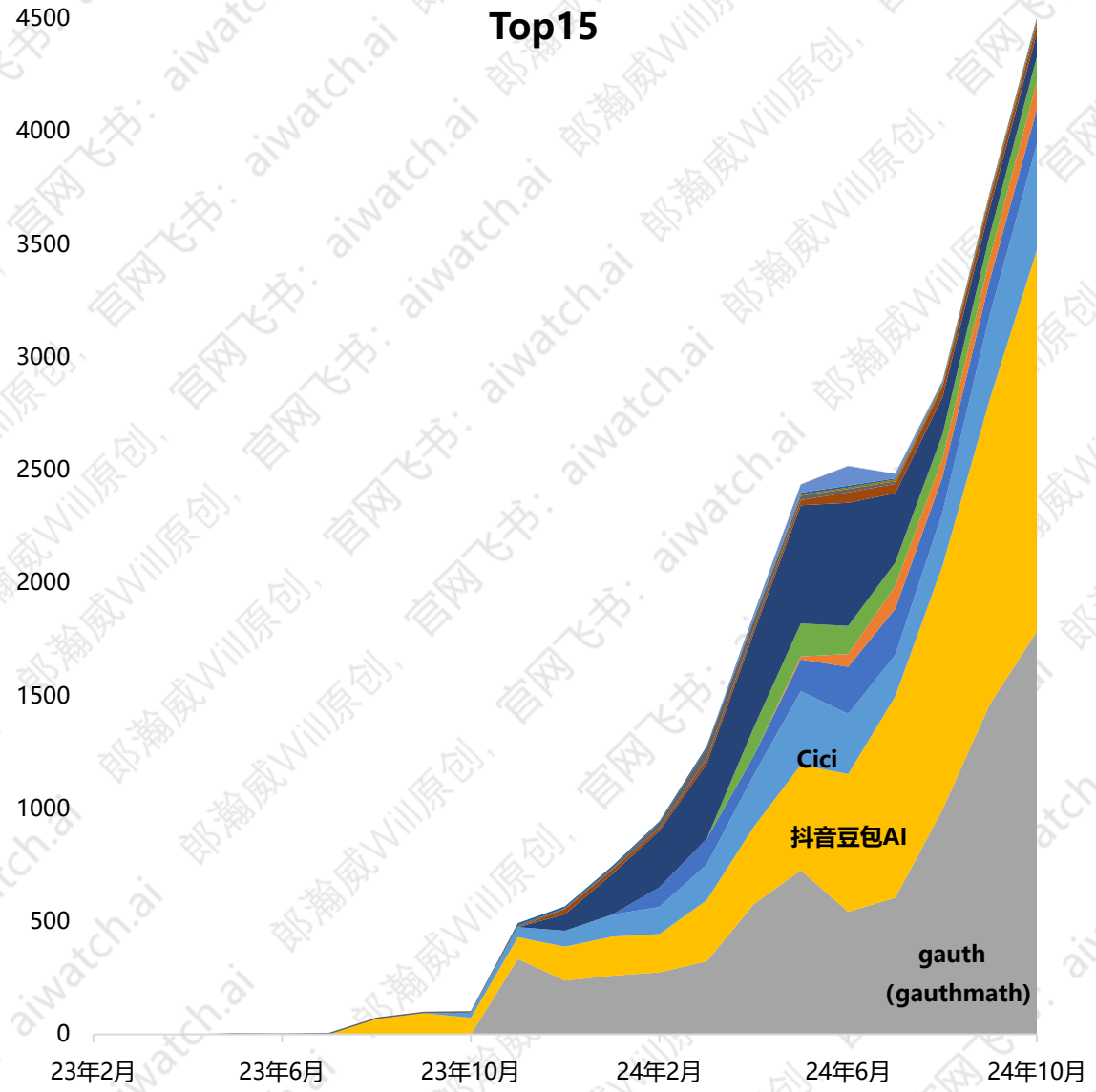
➢ **Top15 总网页流量：4505万次visit**

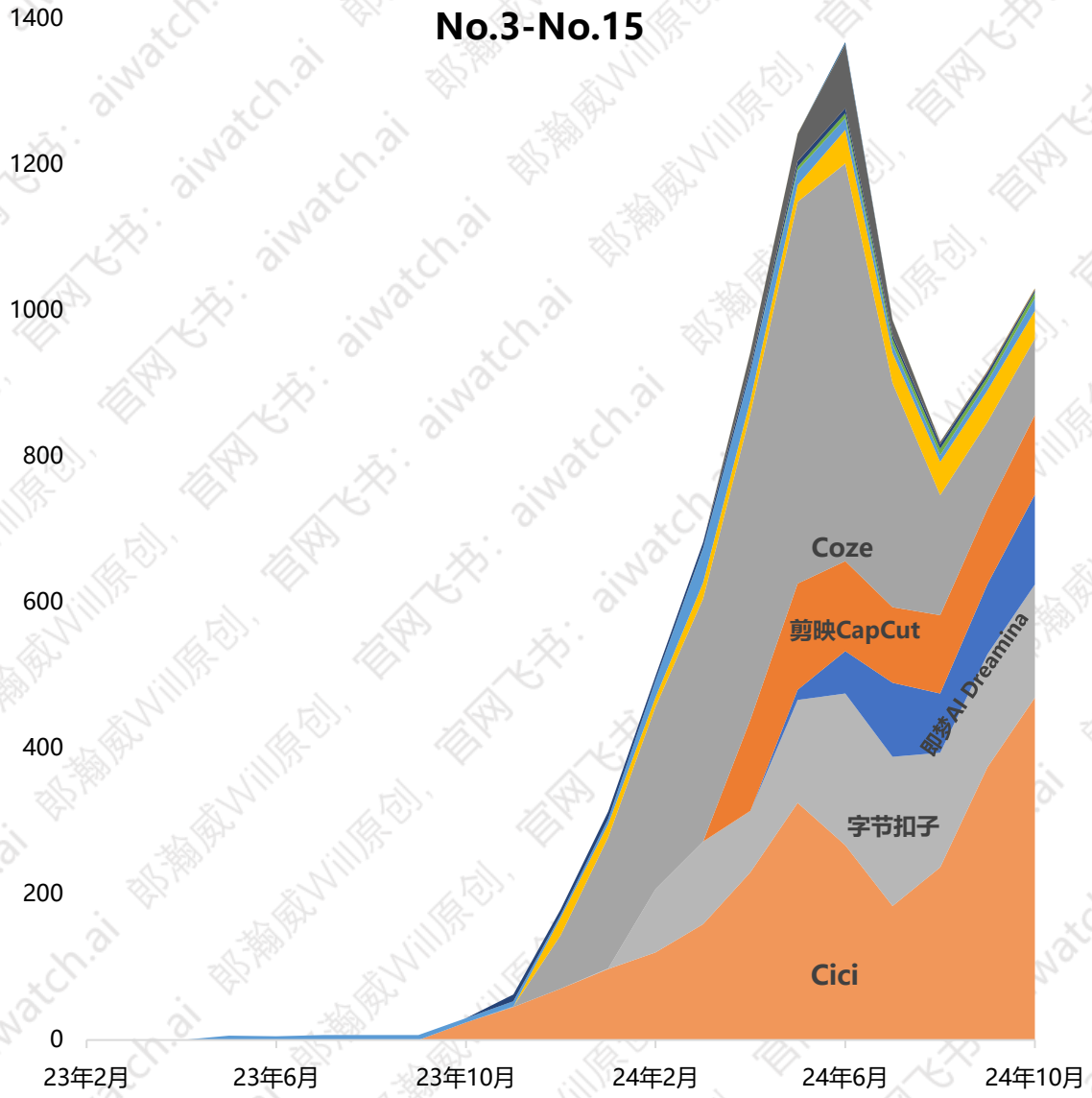
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	gauth（gauthmath）		1,785	-
2	抖音豆包AI	73	1,688	2212%
3	Cici	24	469	1856%
4	字节扣子		155	-
5	即梦AI Dreamina		123	-
6	剪映CapCut		109	-
7	Coze	-	105	-
8	即创		38	-
9	识典古籍	6	17	183%
10	豆包MarsCode		8	-
11	小悟空		3	-
12	Boximator视频编辑		1	-
13	PixelDance文生视频		1	-
14	MagicVideo文生视频		1	-
15	BuboGPT多模态		1	-

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

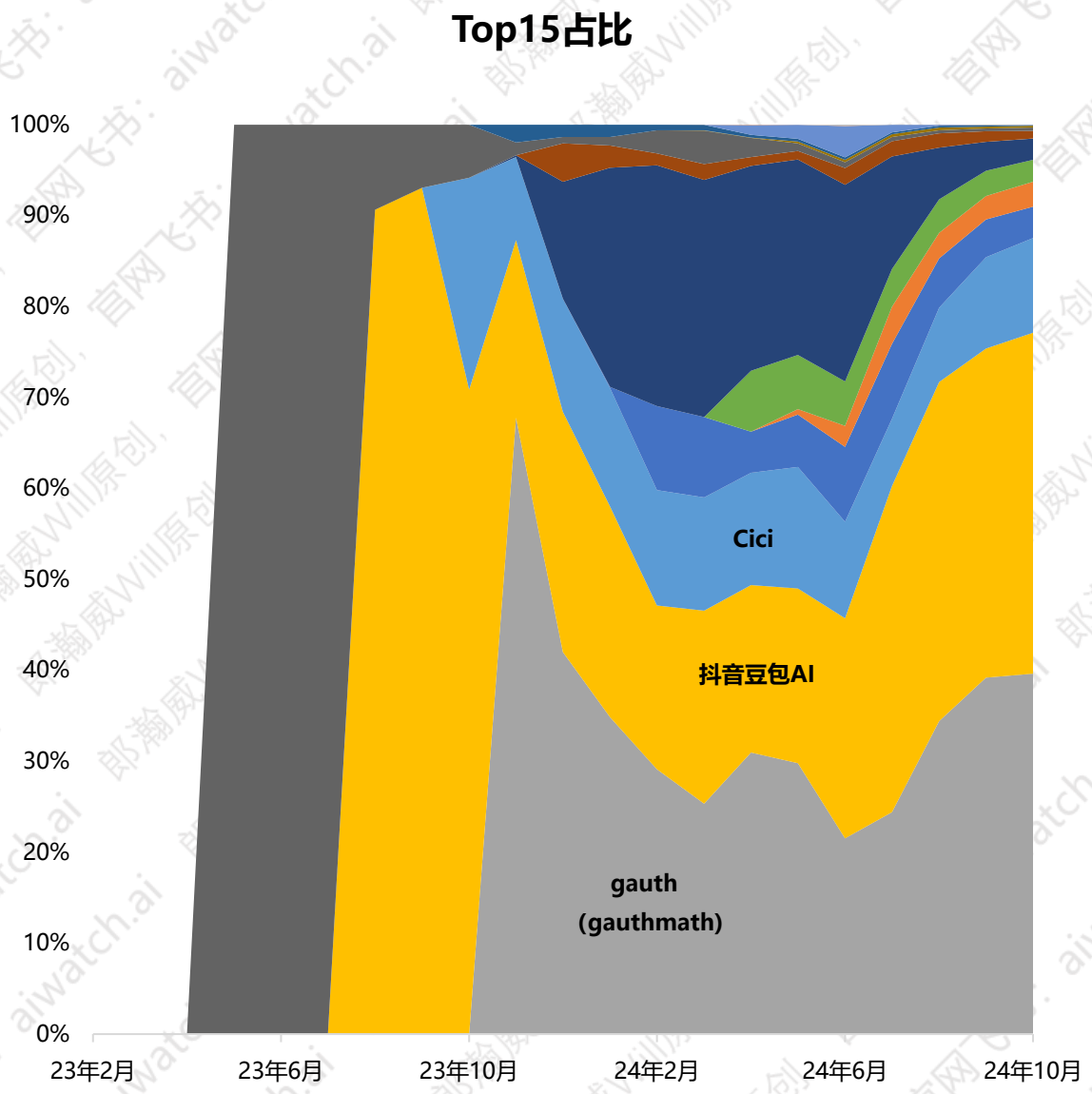
字节 网页流量趋势 10月总量：4505万

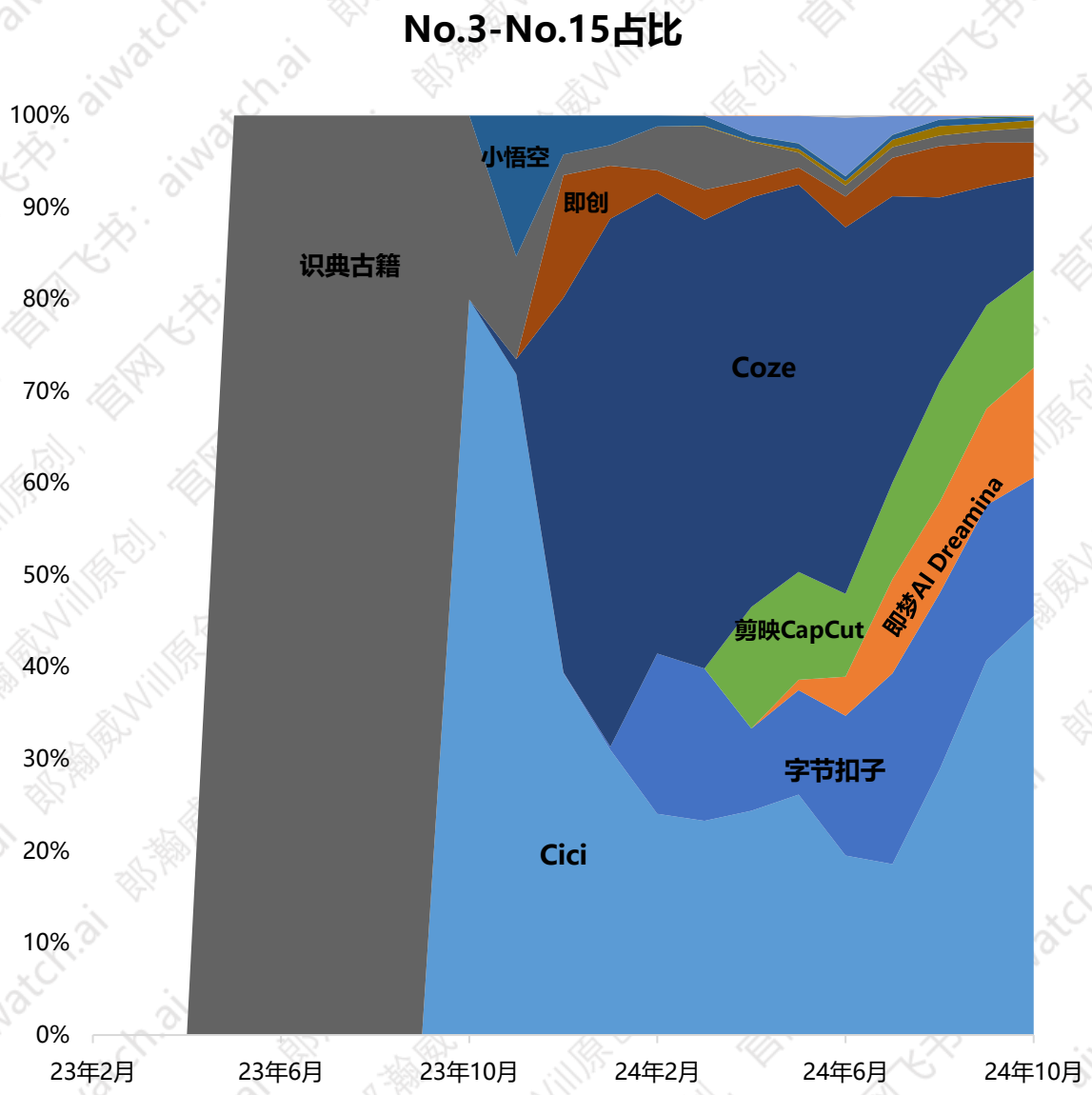




数据来源：similarweb 单位：万visit

字节 2023.2~2024.10 网页流量占比





数据来源：similarweb 单位：万visit

HF0

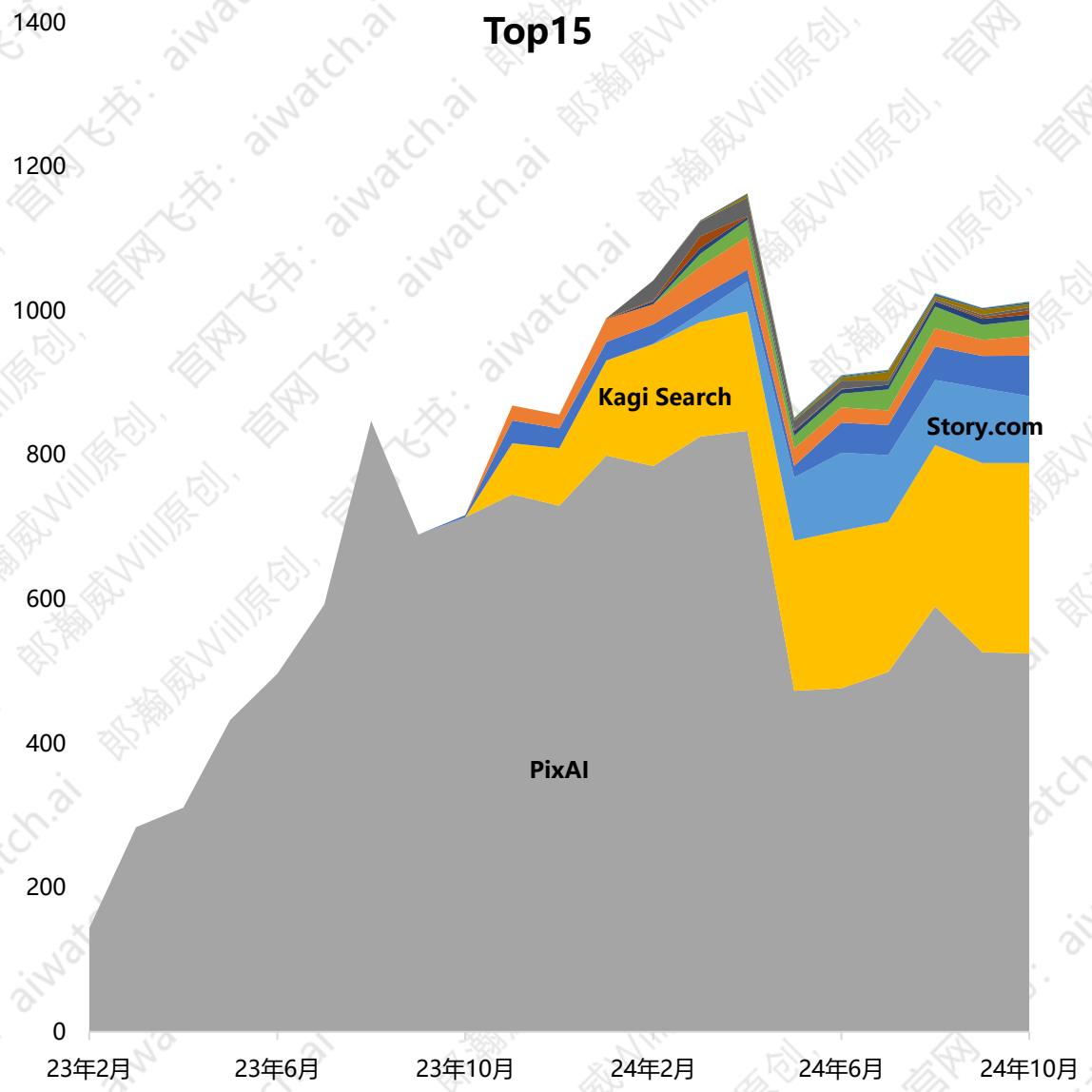
HF0 - Top15

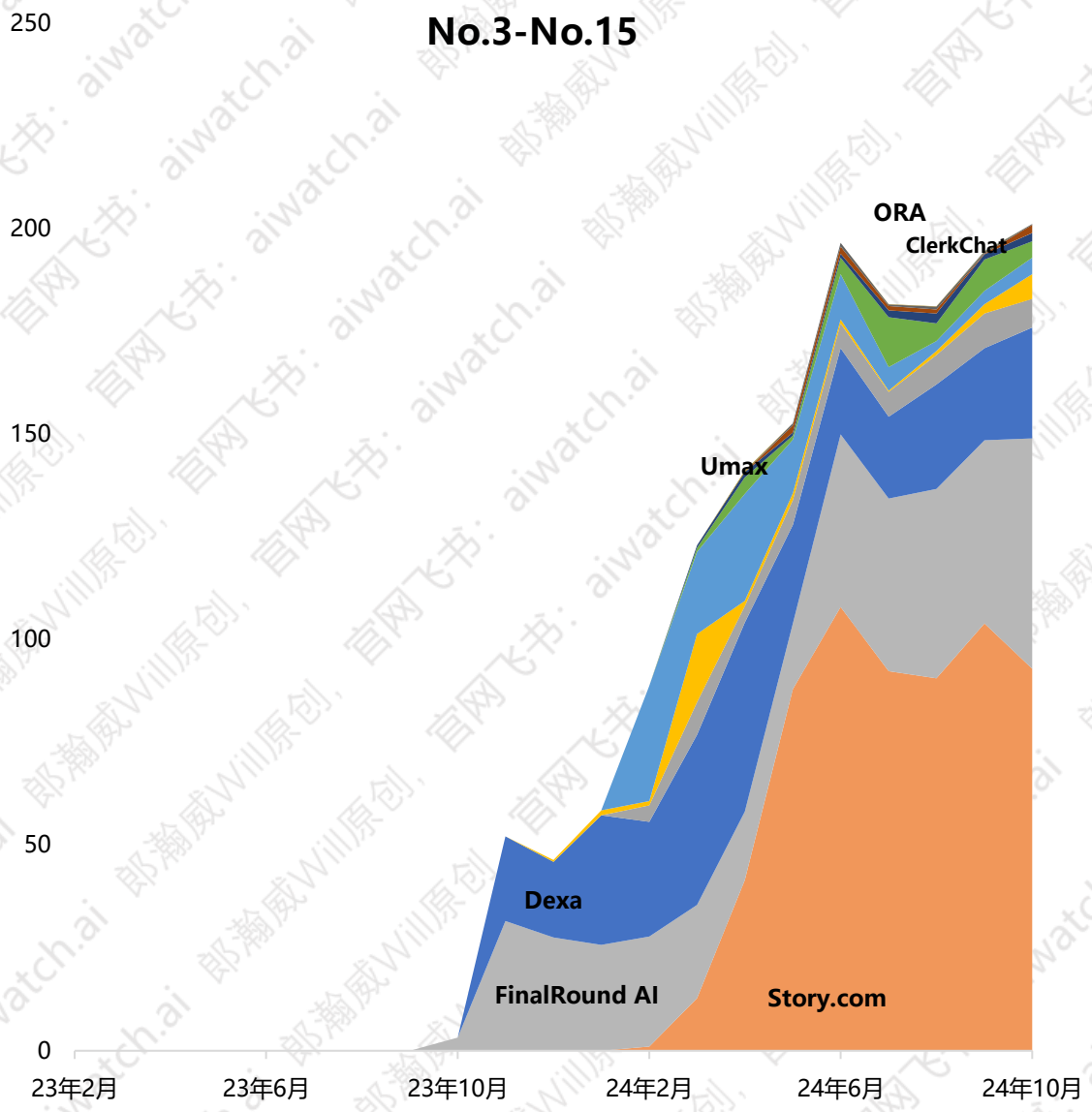
➢ **Top15 总网页流量：1013万次visit**

产品名称	23年10月（万visit）	24年10月（万visit）	年度变化	占比第一国家
PixAI	714	525	-26%	Japan
Kagi Search		264	-	United States
Story.com		93	-	United States
FinalRound AI	3	56	1650%	United States
Dexa		27	-	United States
ClerkChat		7	-	United States
Kontigo		6	-	United States
Umax		4	-	United States
ORA		4	-	United States
Aimerce		2	-	United States
Human		2	-	Indonesia
Sapien		0.2	-	United States
OpenHome		-	-	Poland
Dealteam		-	-	-

数据来源：similarweb 单位：万visit

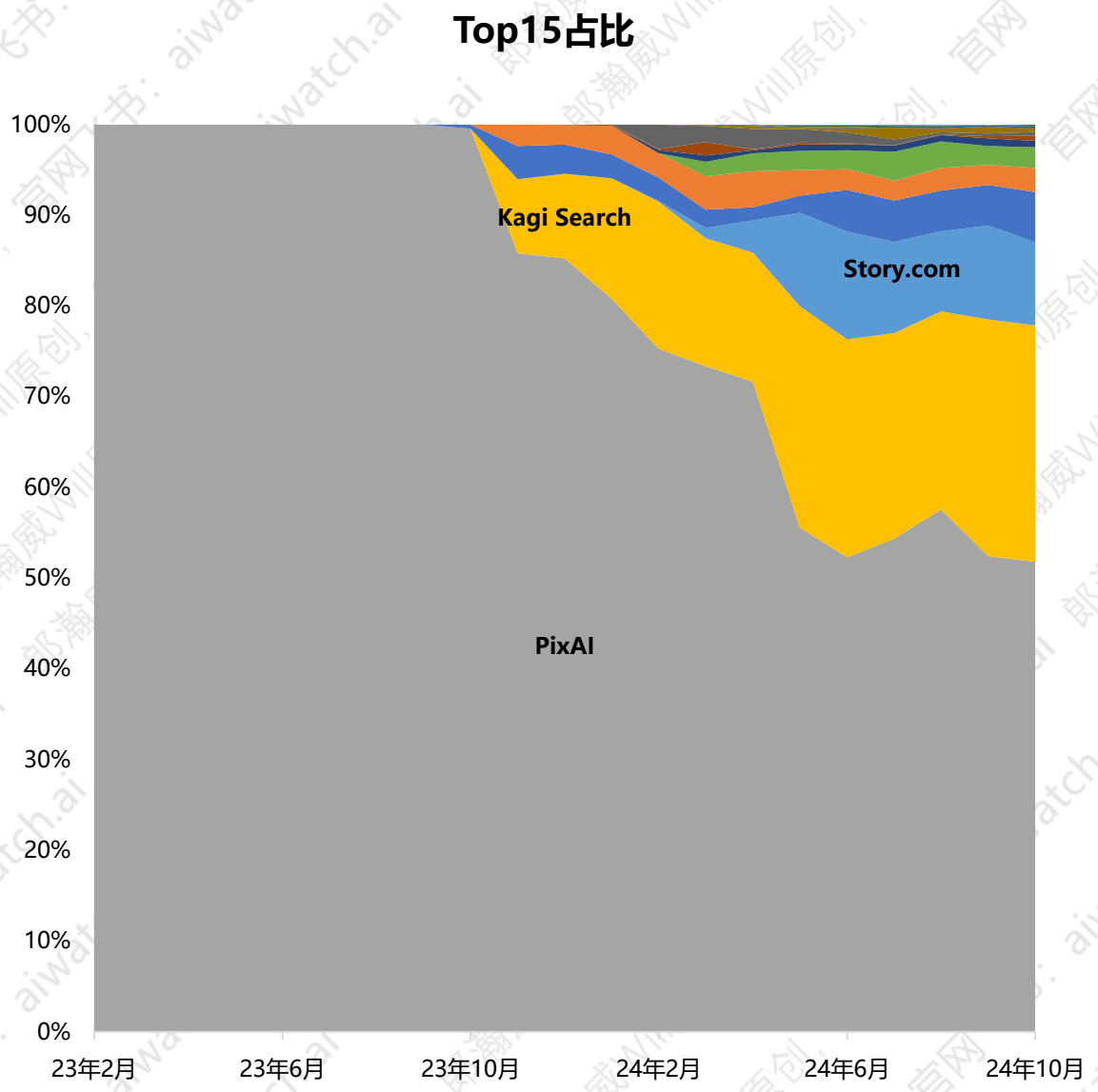
HF0 网页流量趋势 10月总量：1013万

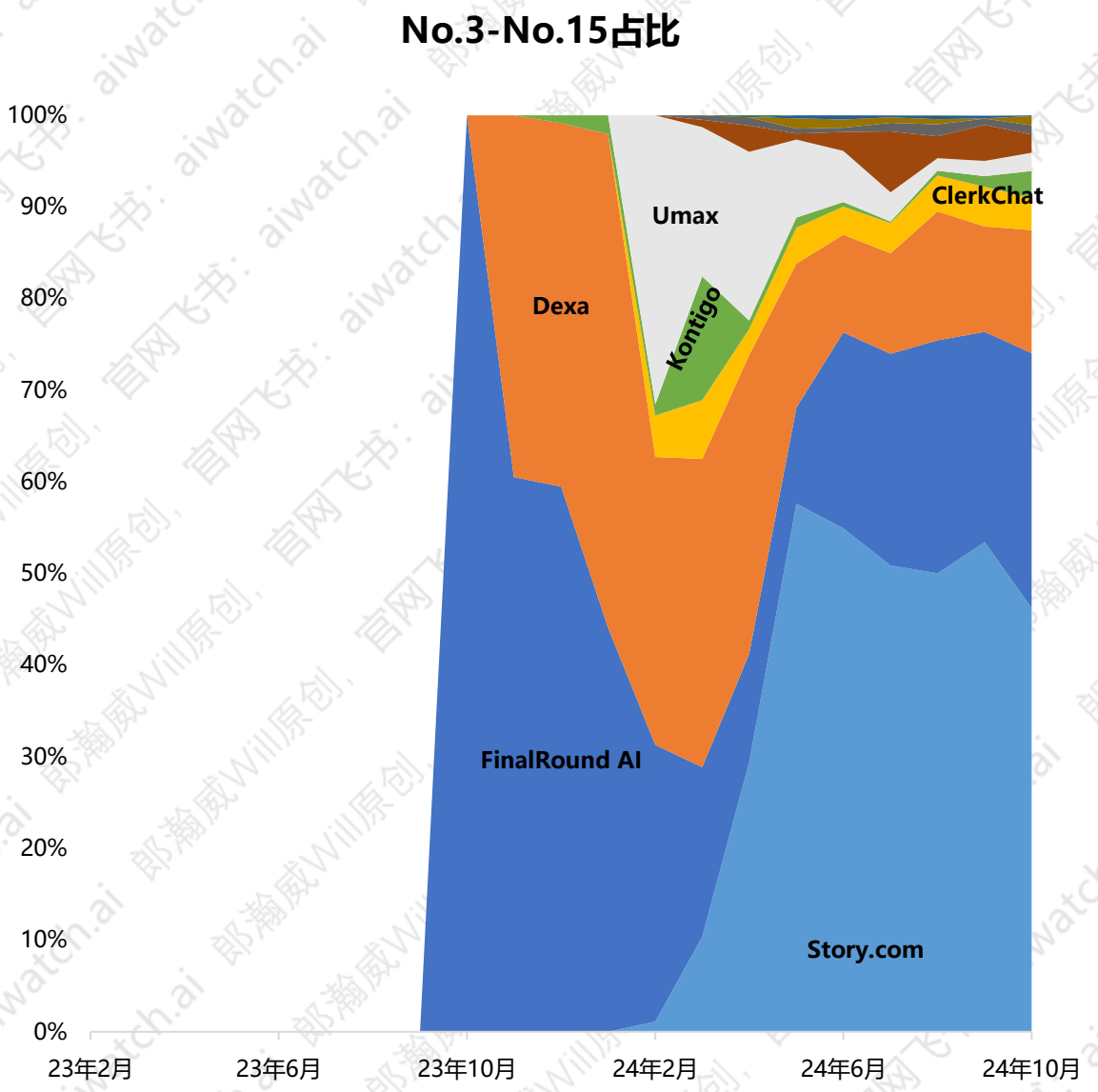




数据来源：similarweb 单位：万visit

HF0 2023.2~2024.10 网页流量占比





数据来源：similarweb 单位：万visit

巨头AI产品

巨头AI产品

巨头AI产品 - Top15

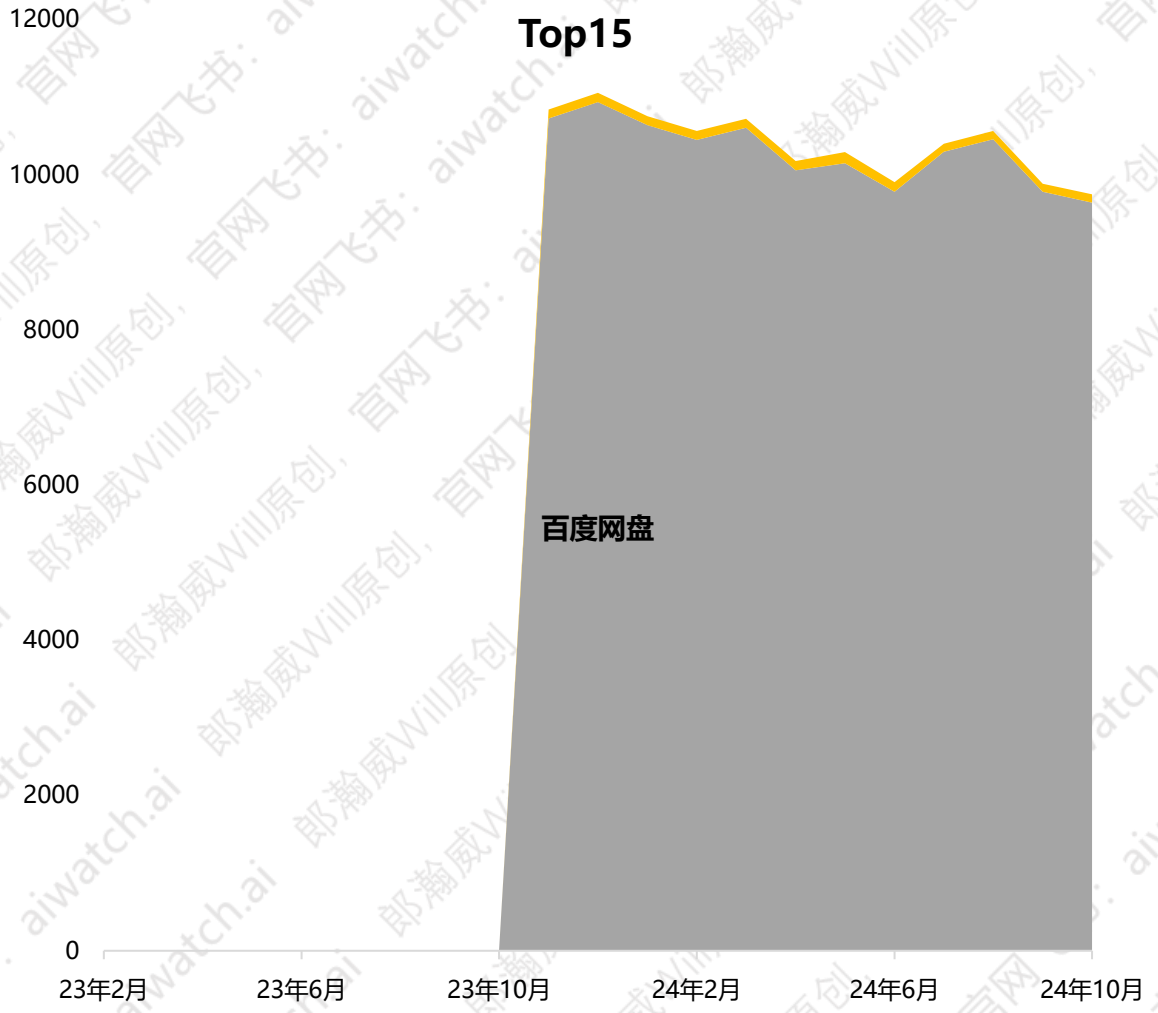
➢ **Top15 总网页流量：9752万次visit**

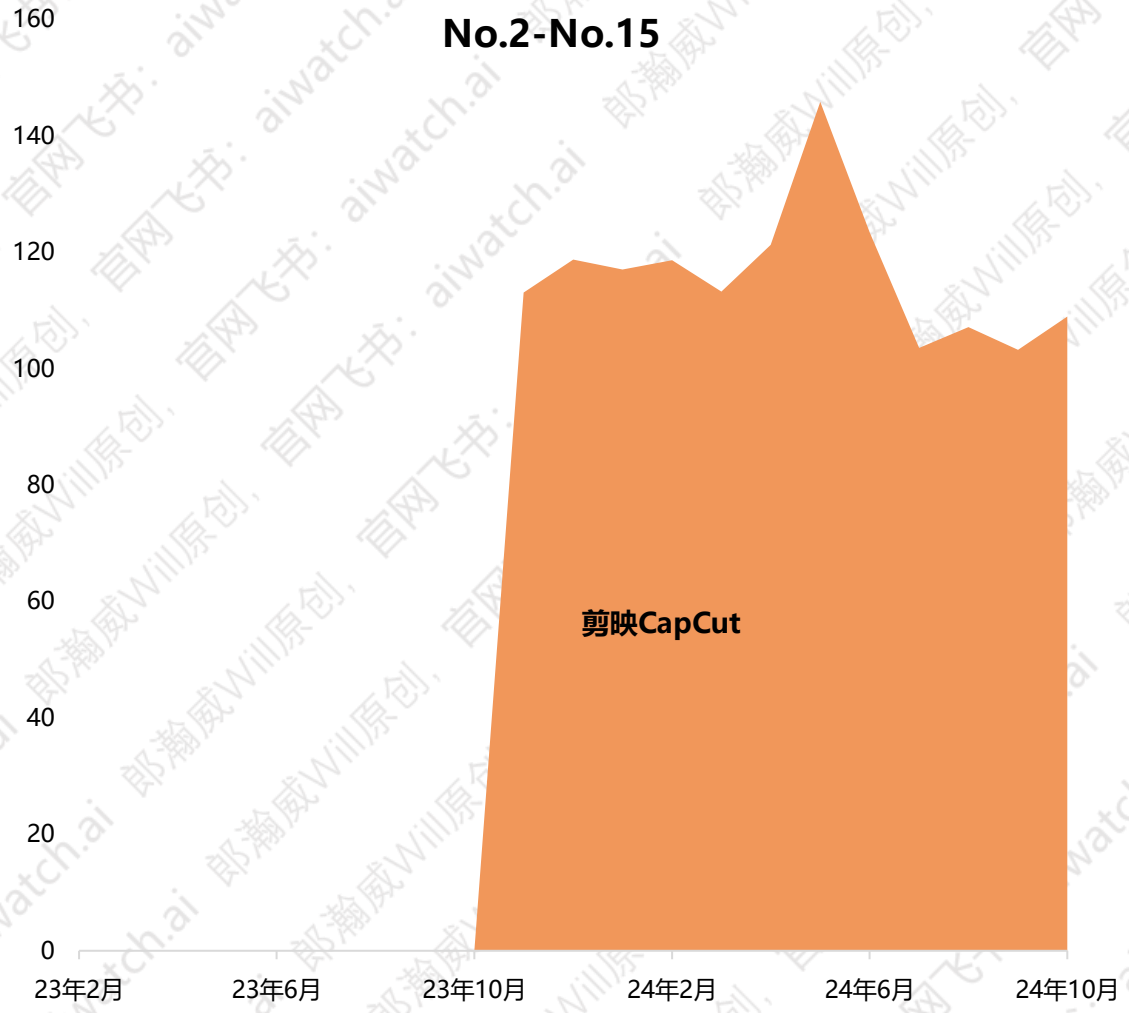
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	百度网盘	-	9,643	-
2	剪映CapCut	-	109	-

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

巨头AI产品 2023.2~2024.10 网页流量趋势

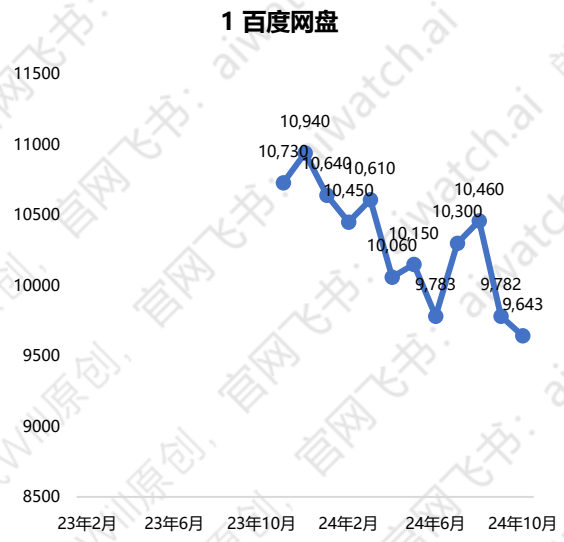


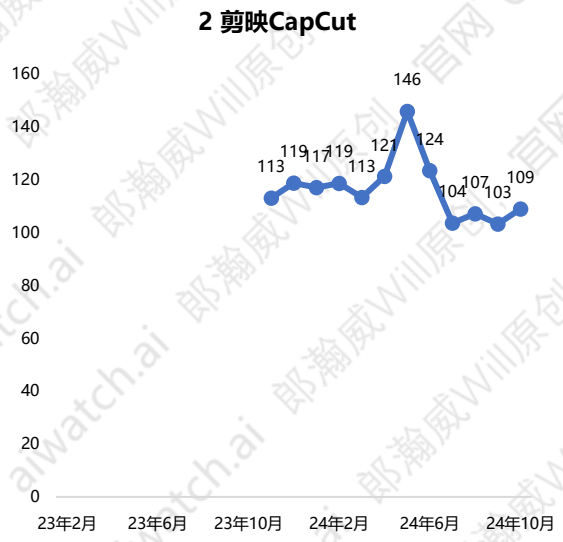


数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

巨头AI产品 – Top2

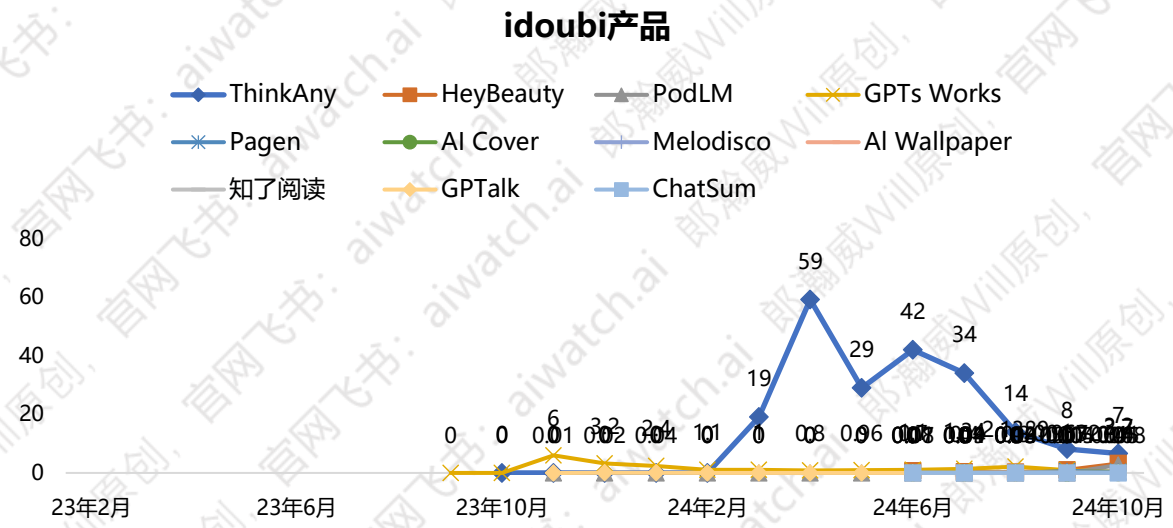


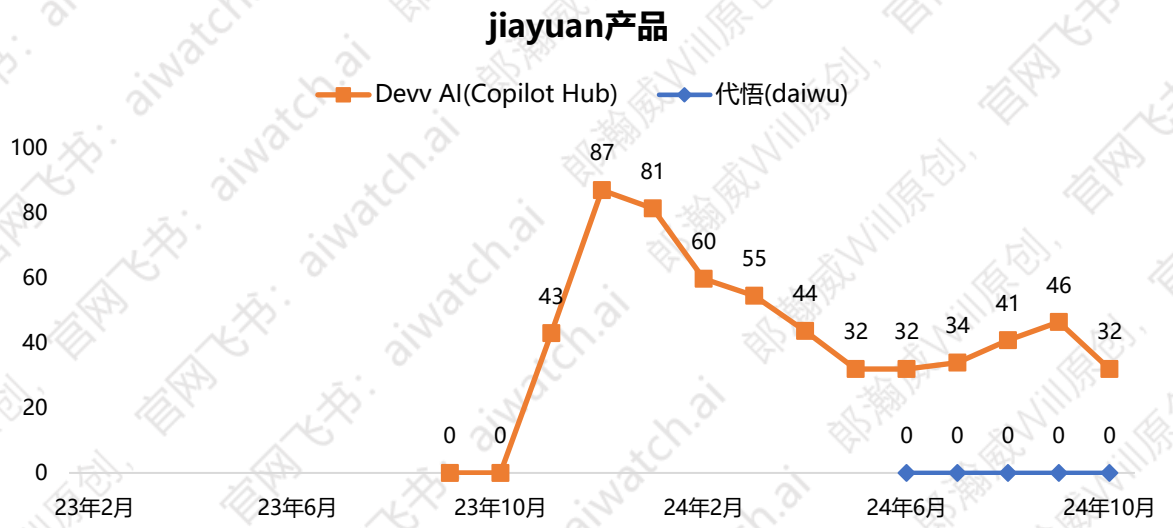


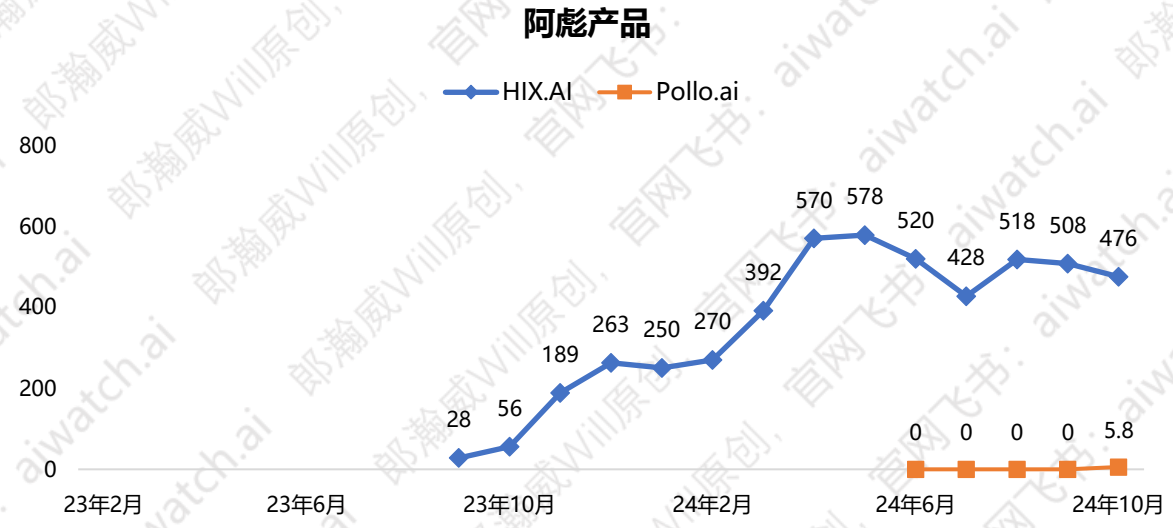
数据来源：similarweb 单位：万visit

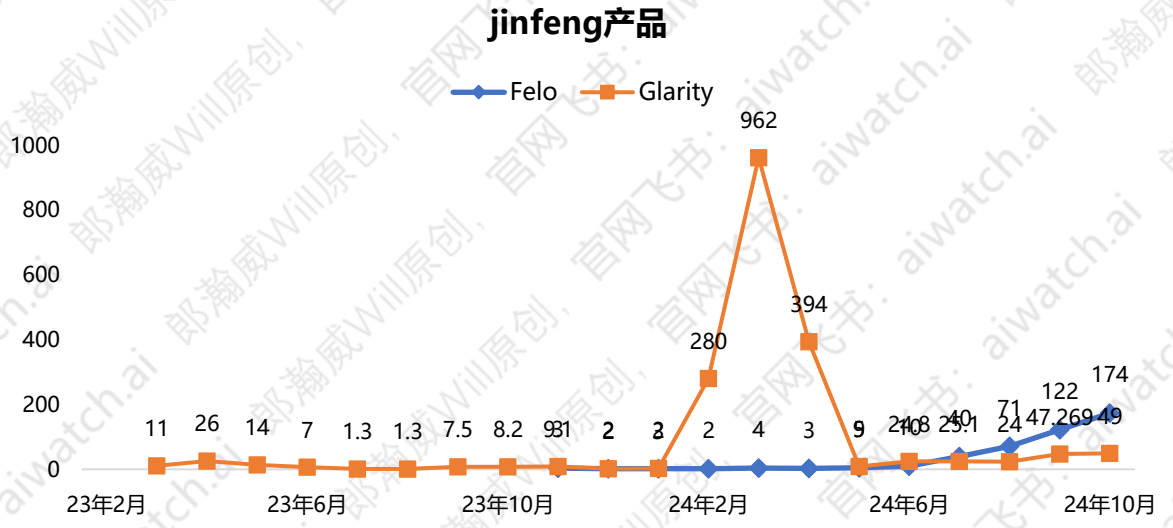
活跃的出海开发者

活跃的出海开发者 复合图表









数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

万兴

万兴 - Top15

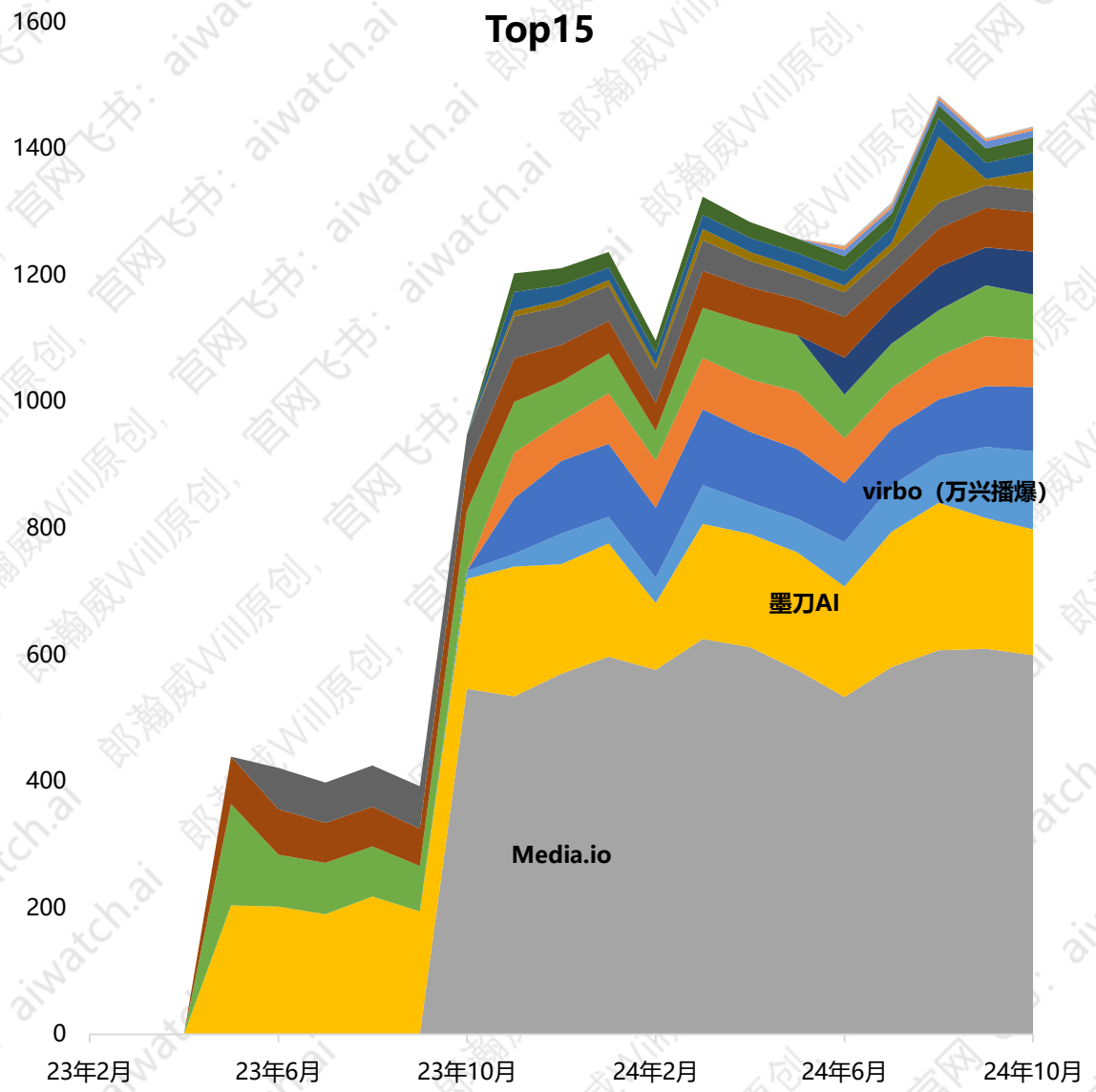
➢ Top15 总网页流量：1435万次visit

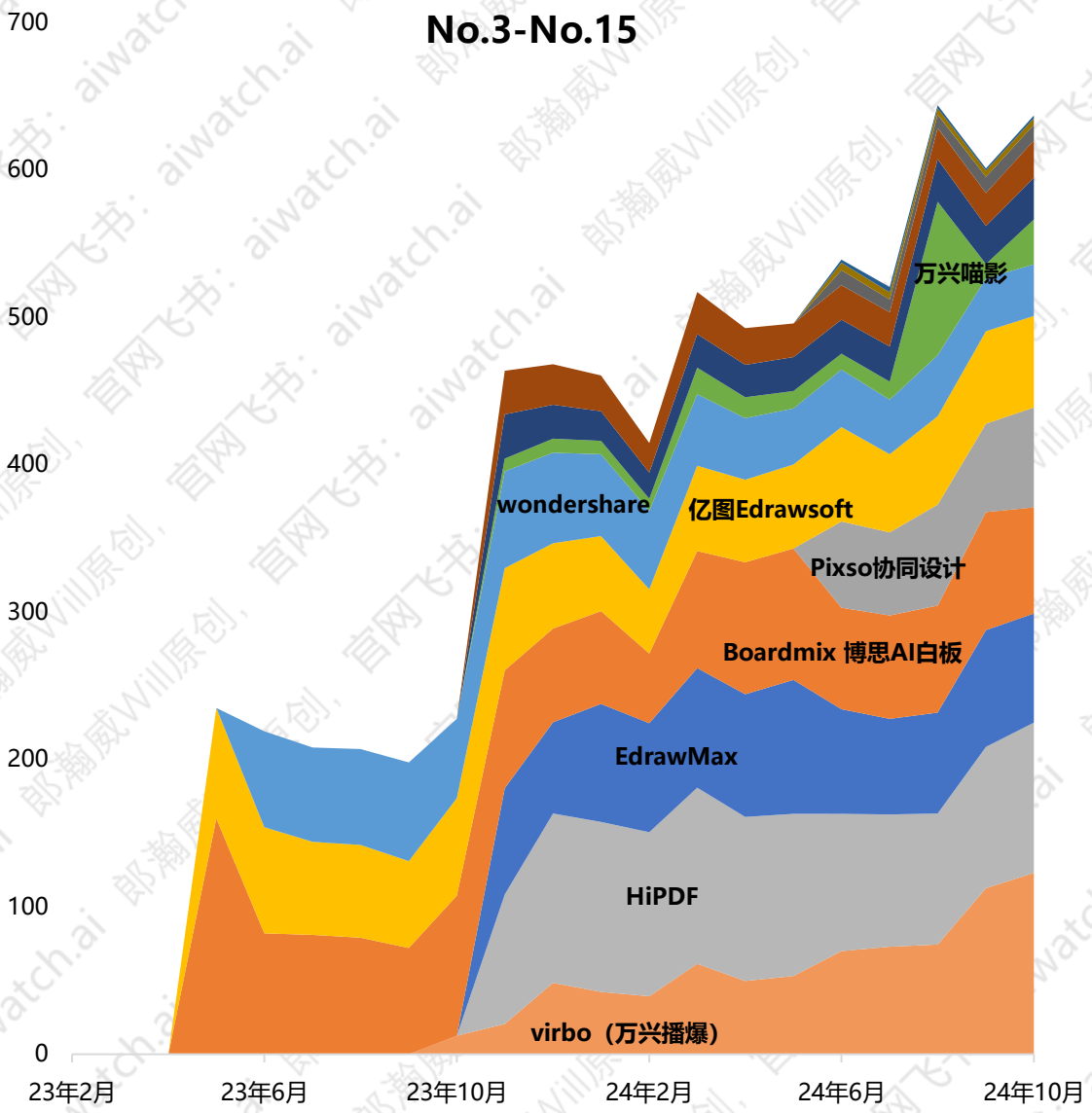
序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化
1	Media.io	546	599	10%
2	墨刀AI	174	199	14%
3	virbo（万兴播爆）	13	123	876%
4	HiPDF		102	-
5	EdrawMax		74	-
6	Boardmix 博思AI白板	95	72	-24%
7	Pixso协同设计		68	-
8	亿图Edrawsoft	66	62	-6%
9	wondershare	54	35	-35%
10	万兴喵影		30	-
11	亿图脑图		28	-
12	万兴PDF		25	-
13	亿图		10	-
14	万兴HiPDF		5	-
15	万兴优转		2	-

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

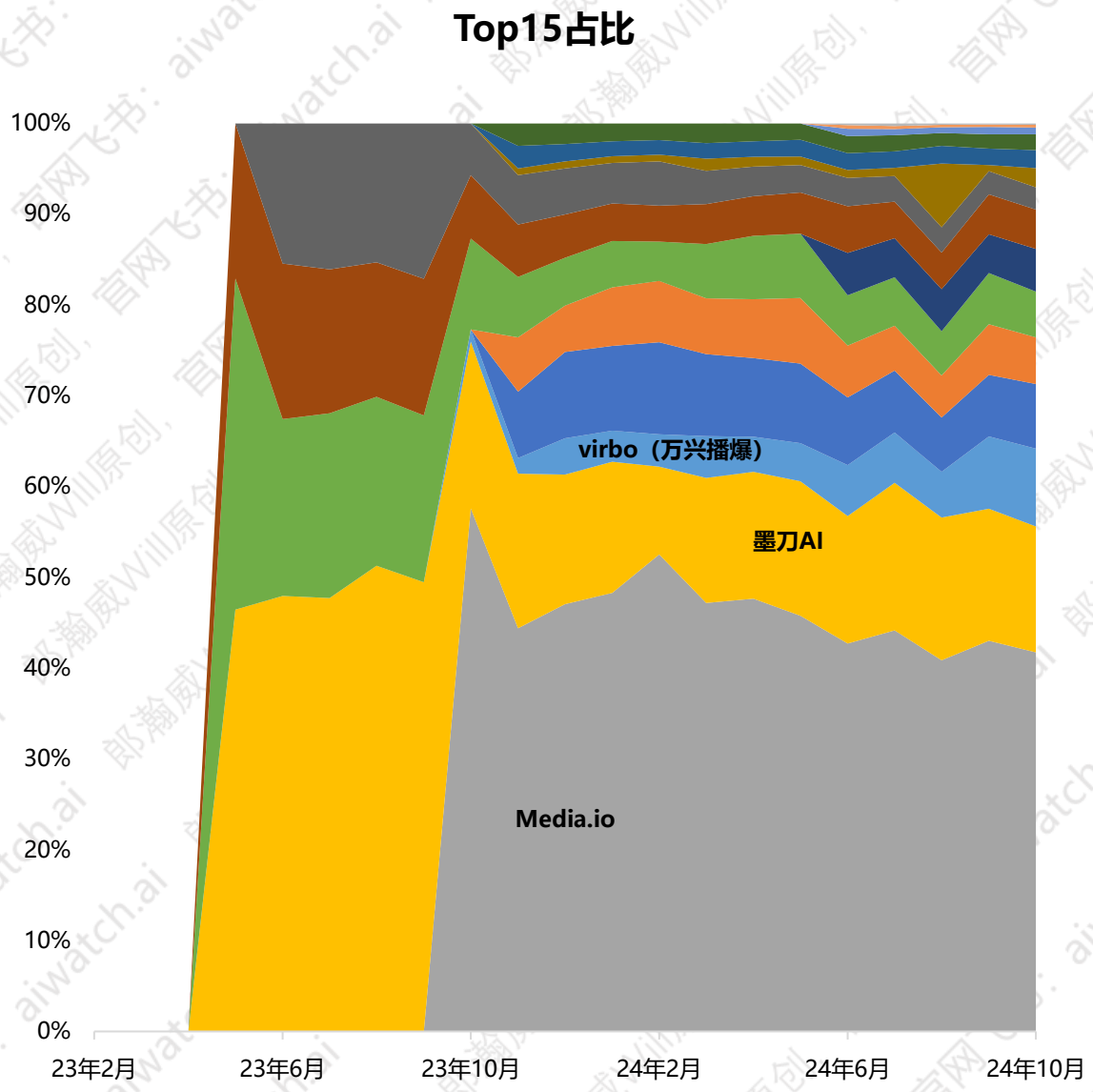
万兴 网页流量趋势 10月总量：1435万

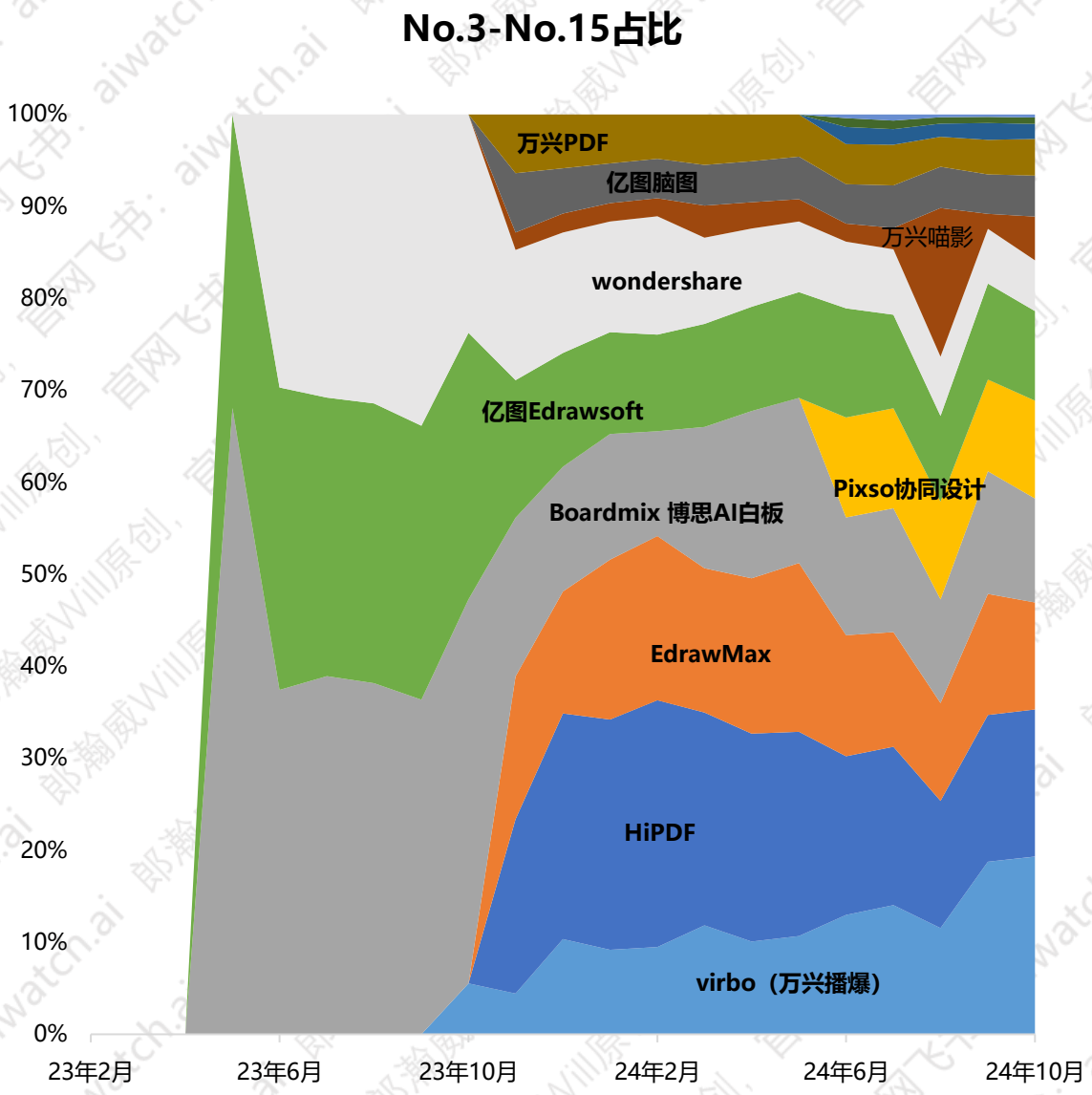




数据来源：similarweb 单位：万visit

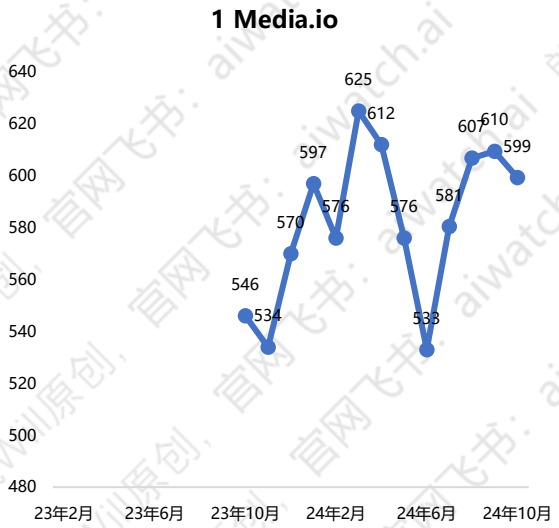
万兴 2023.2~2024.10 网页流量占比

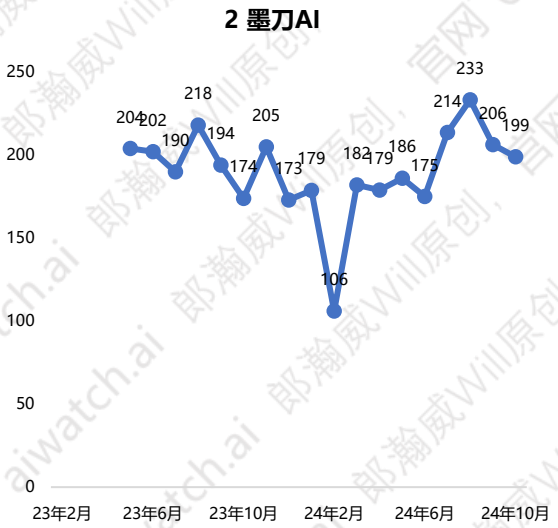


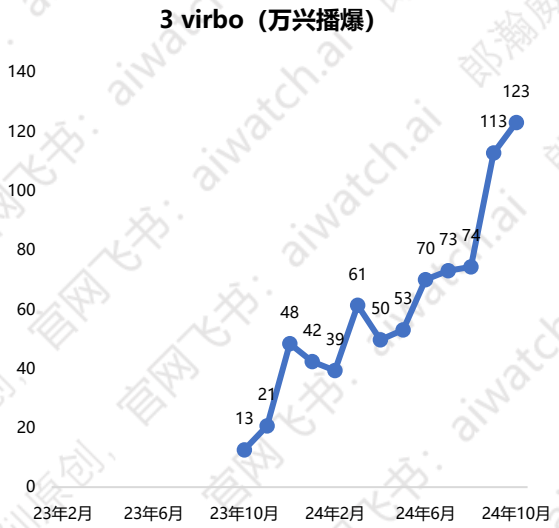


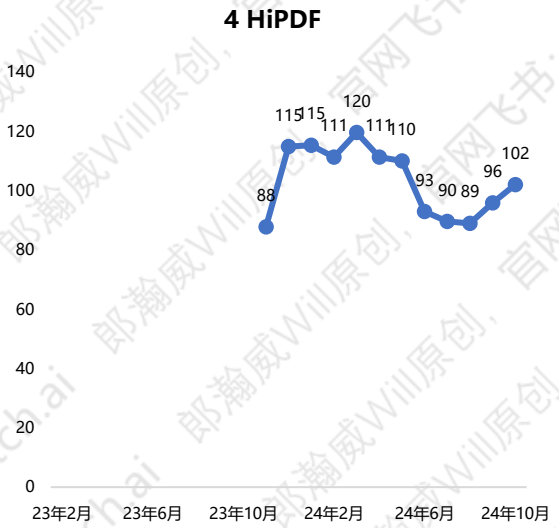
数据来源：similarweb 单位：万visit

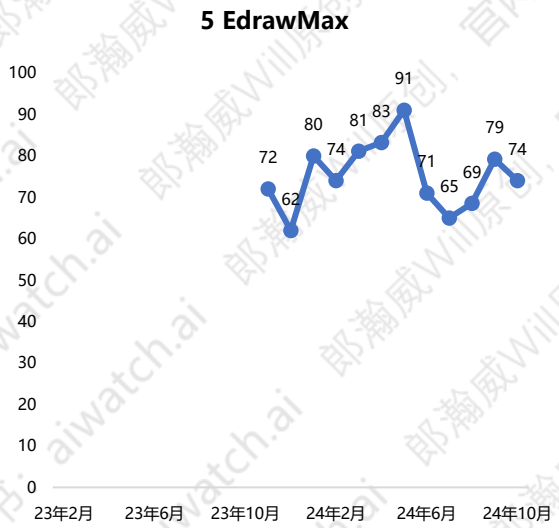
万兴 No.1-No.8

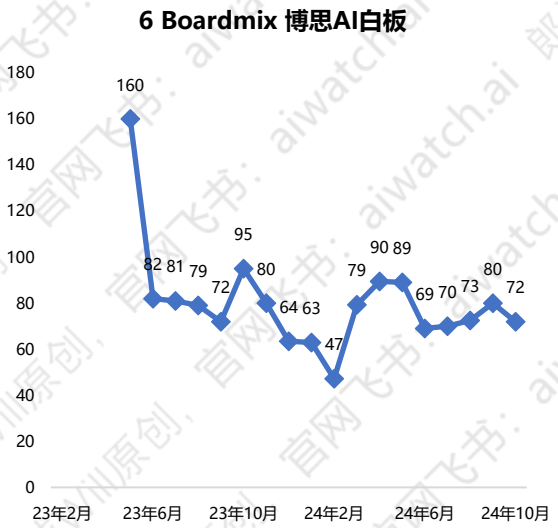


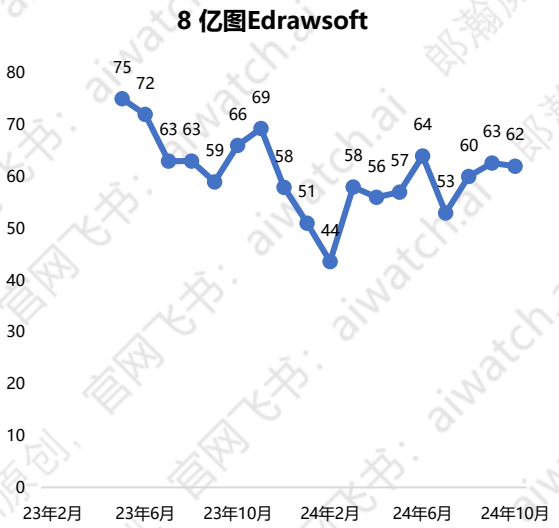






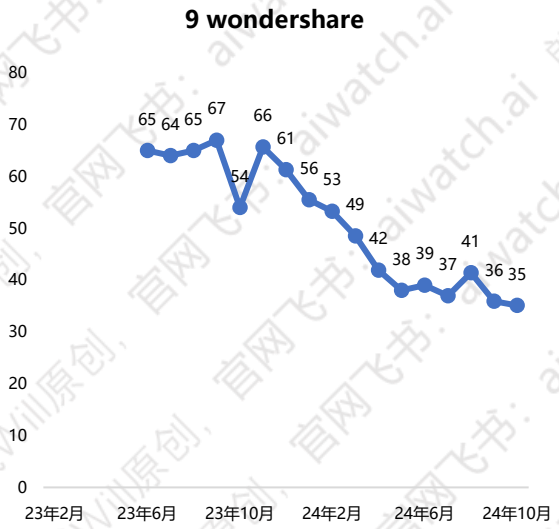


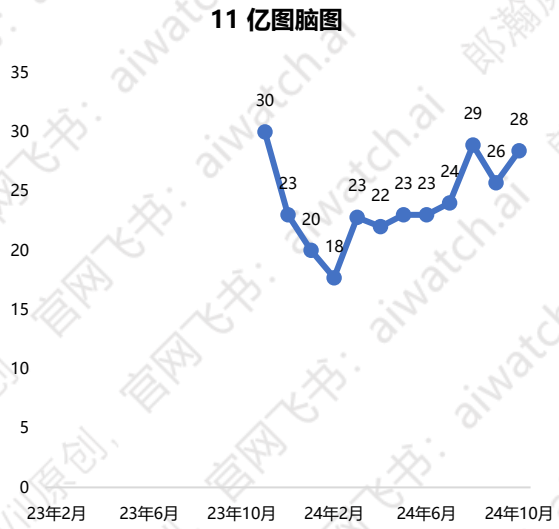


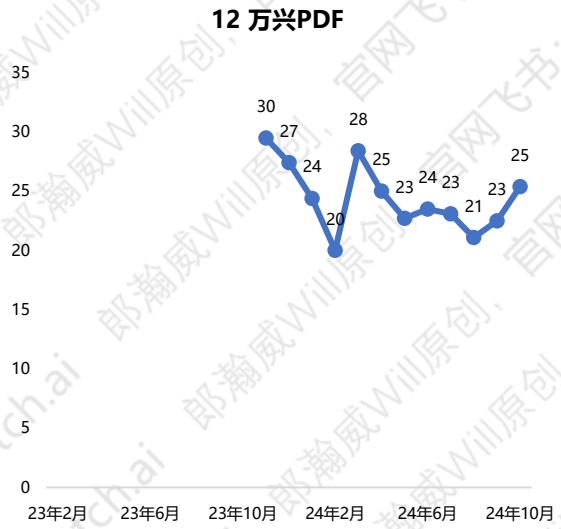


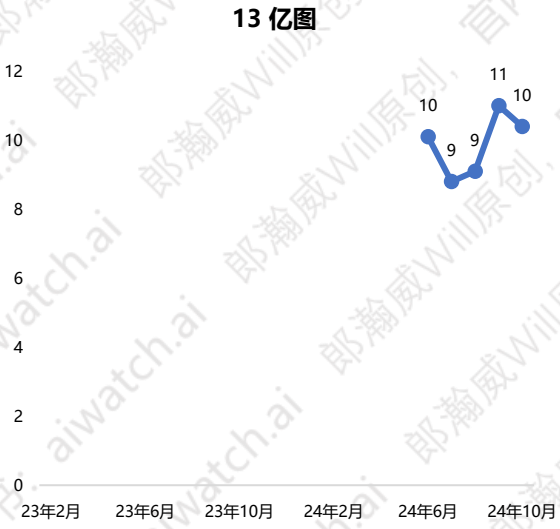
数据来源：similarweb 单位：万visit

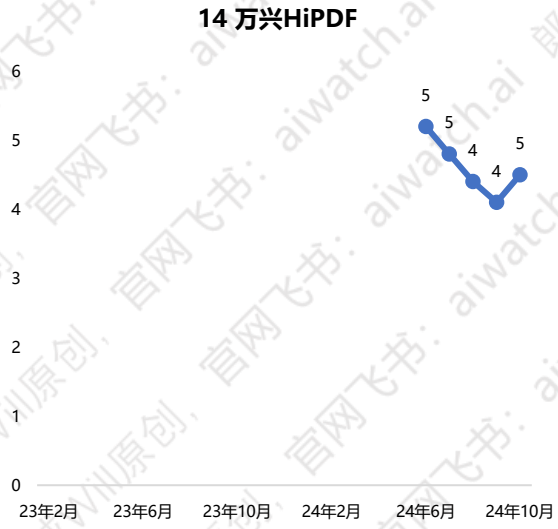
万兴 No.9-No.16

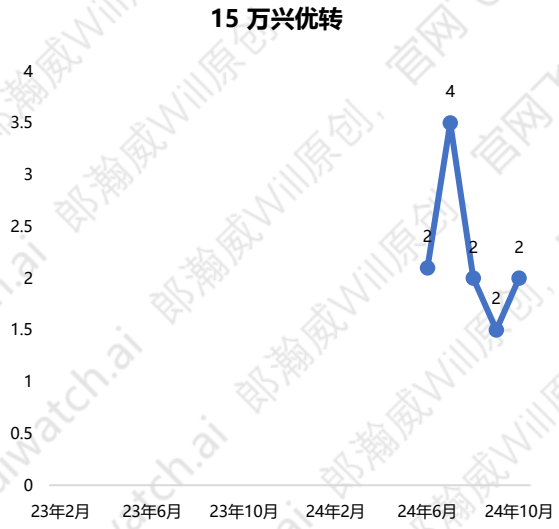


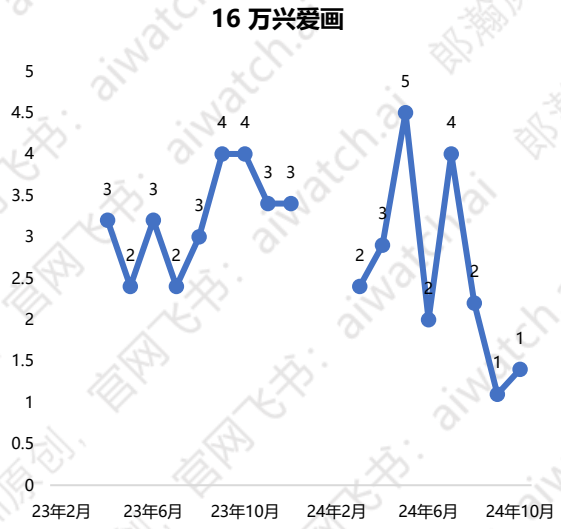












数据来源：similarweb 单位：万visit

美图

美图 - Top15

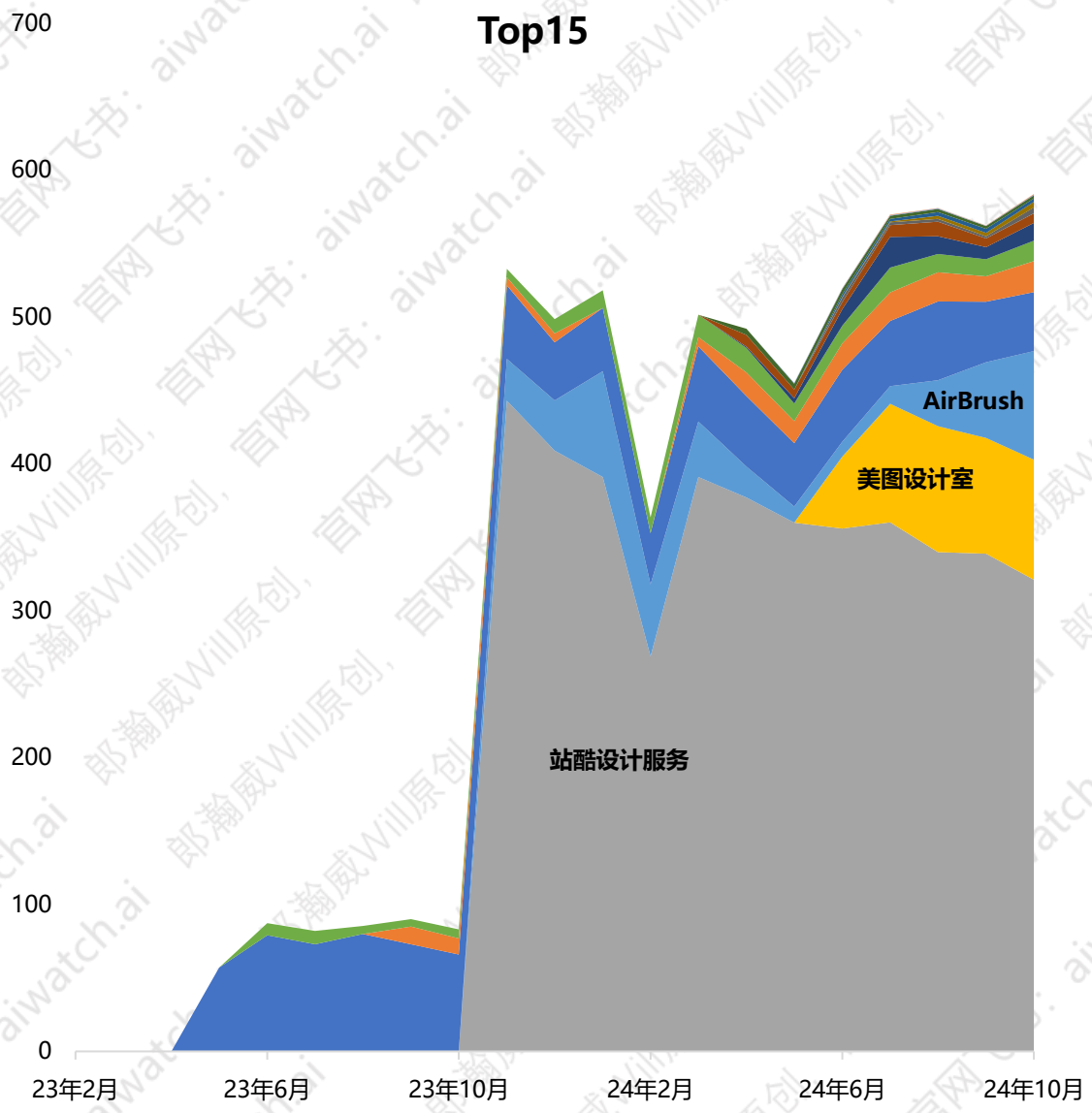
➢ **Top15 总网页流量：583万次visit**

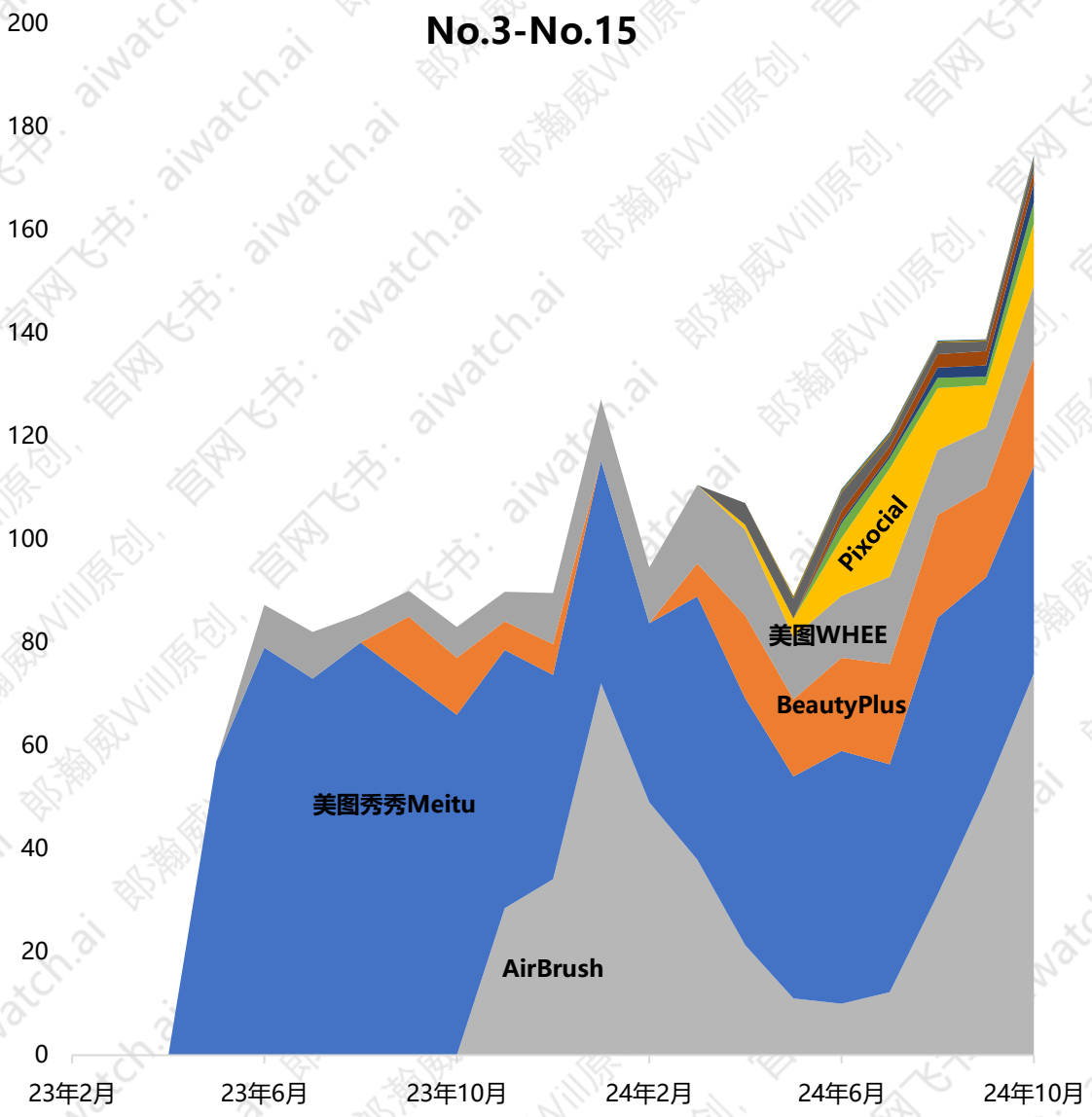
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	站酷设计服务		321	-
2	美图设计室		82	-
3	AirBrush		74	-
4	美图秀秀Meitu	66	40	-39%
5	BeautyPlus	11	21	91%
6	美图WHEE	6	14	133%
7	Pixocial		12	-
8	wink		7	-
9	美图奇想大模型		4	-
10	MOKI		4	-
11	开拍		2	-
12	美图云修		2	-
13	MiracleVision		1	-
14	美图宜肤		0.4	-
15	奇觅		-	-

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

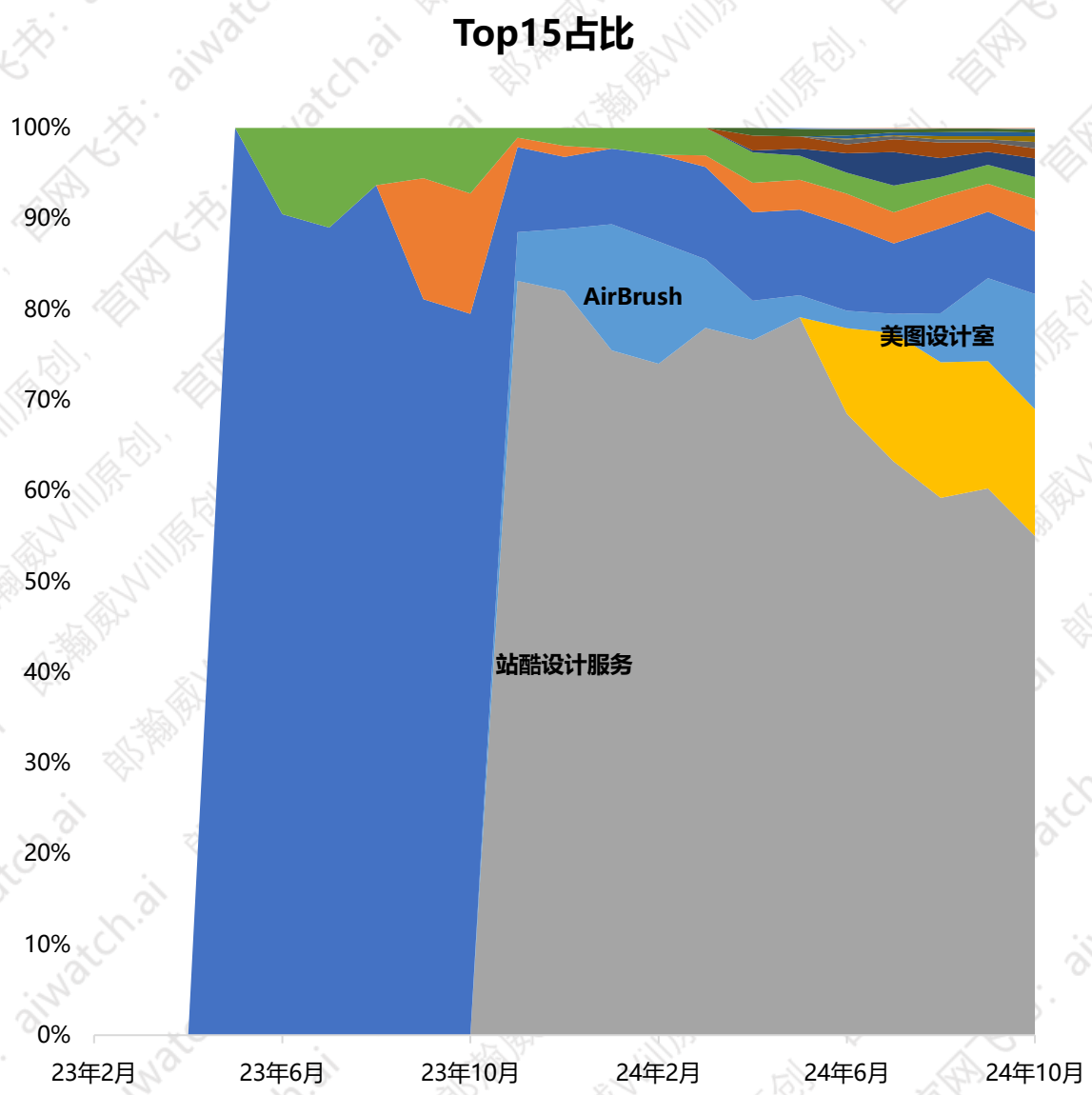
美图 网页流量趋势 10月总量：583万

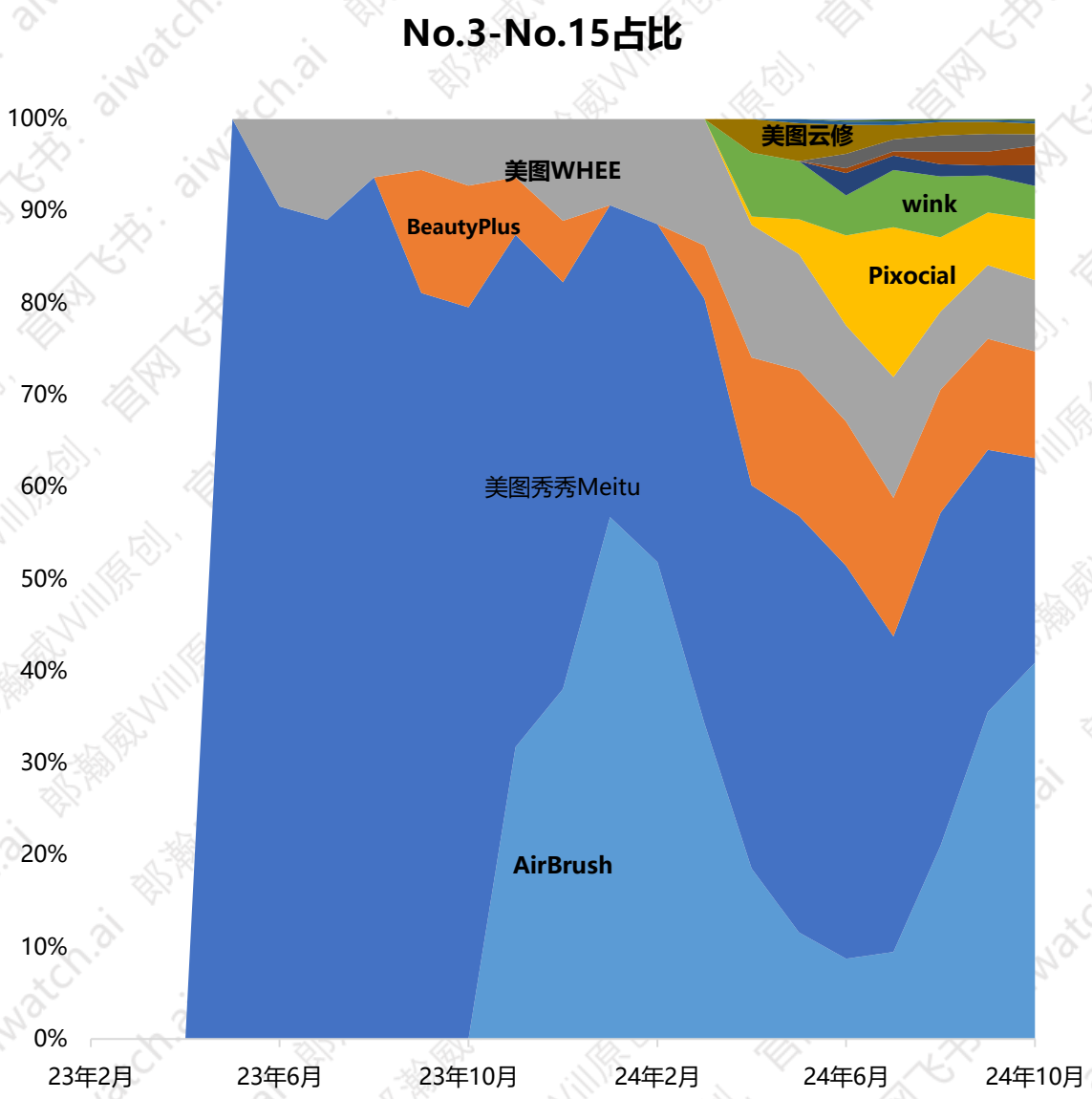




数据来源：similarweb 单位：万visit

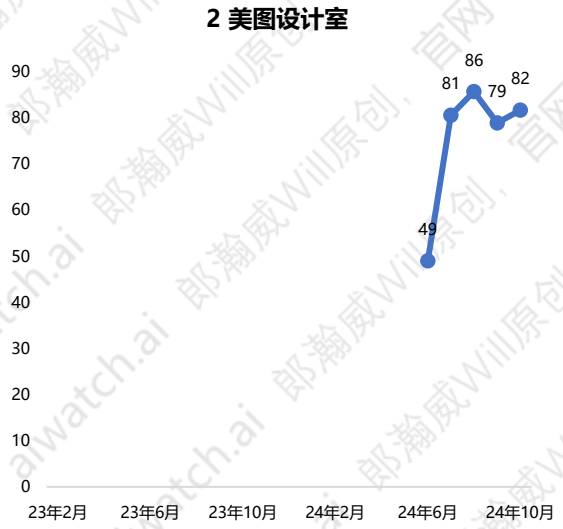
美图 2023.2~2024.10 网页流量占比

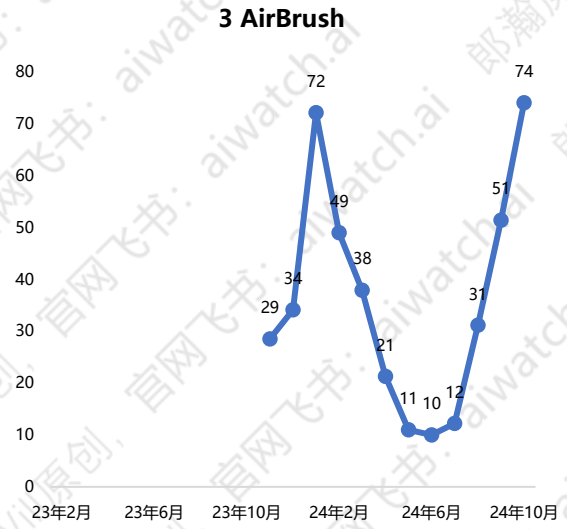


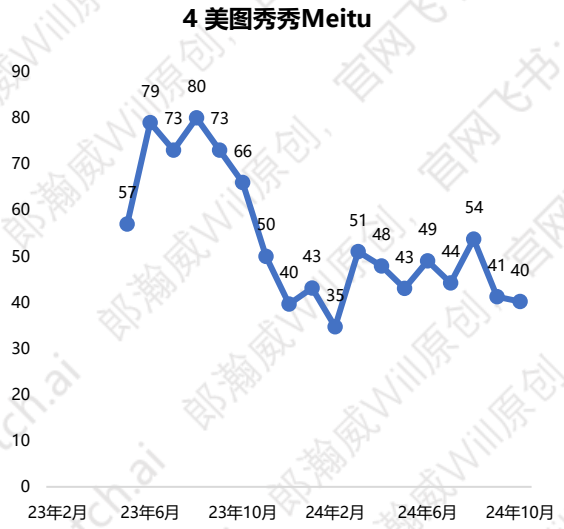


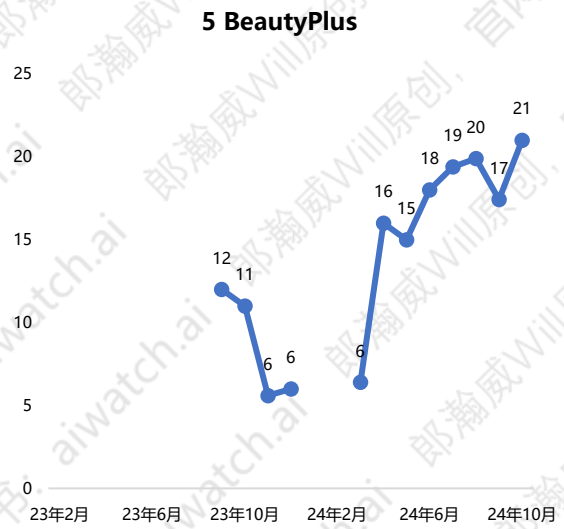
数据来源：similarweb 单位：万visit

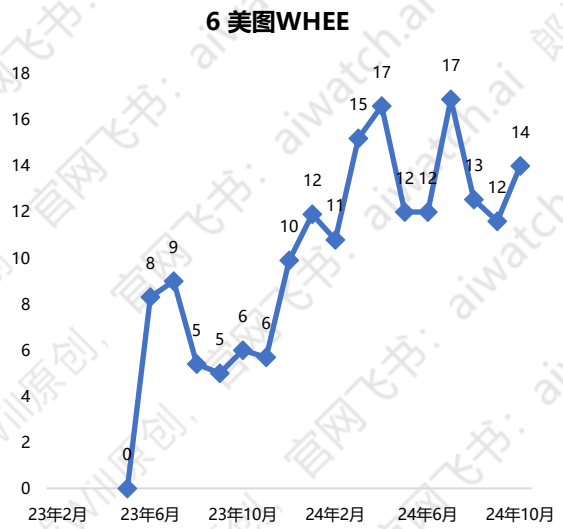
美图 No.1-No.8

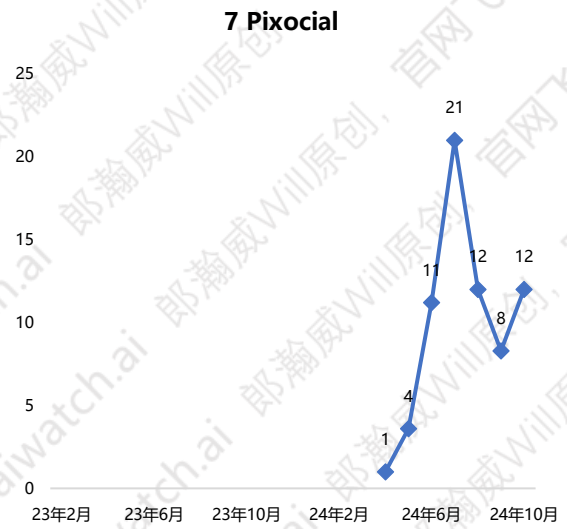


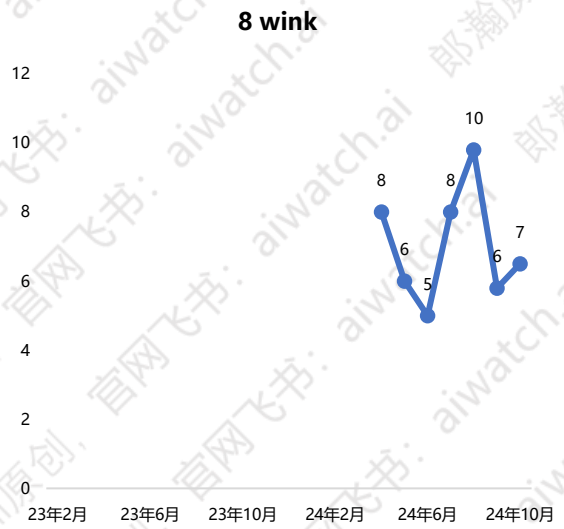








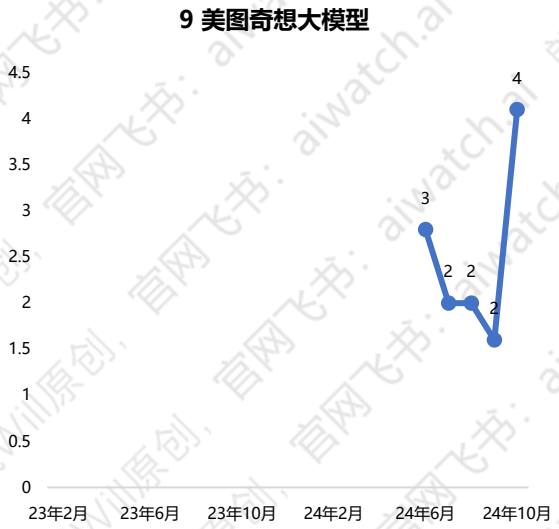


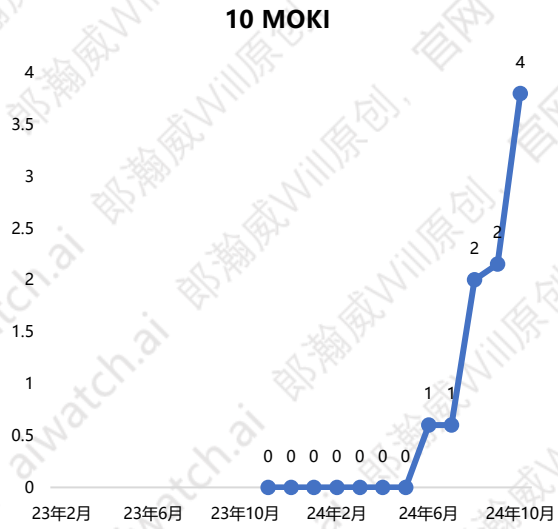


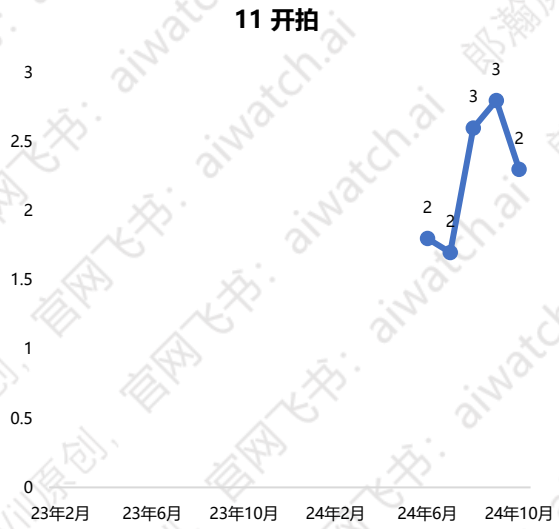
数据来源：similarweb 单位：万visit

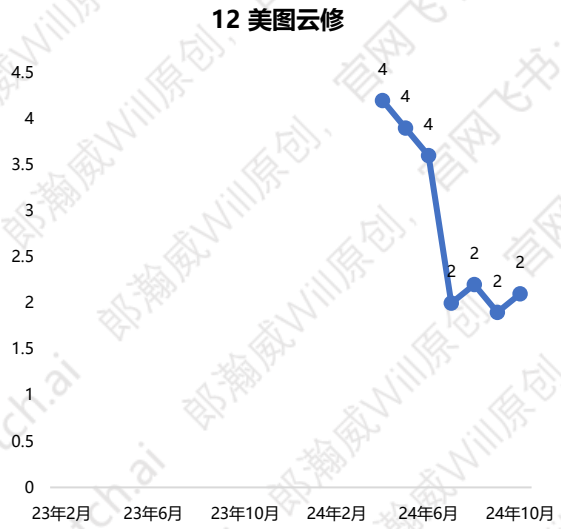
郎瀚威Will原创，官网飞书：aiwatch.ai

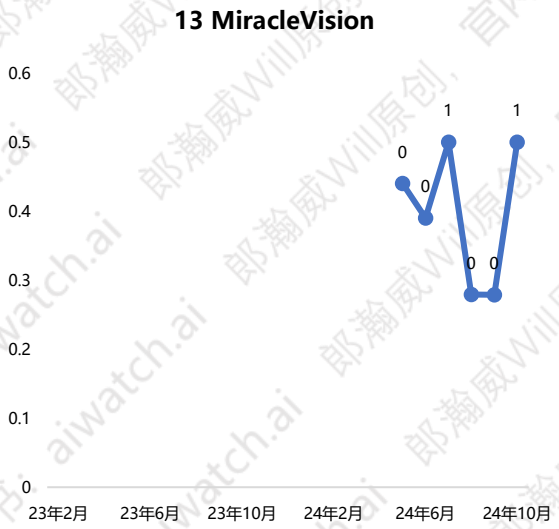
美图 No.9-No.16

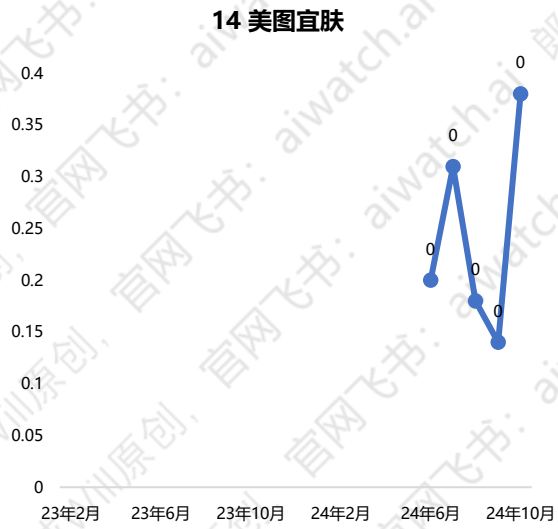


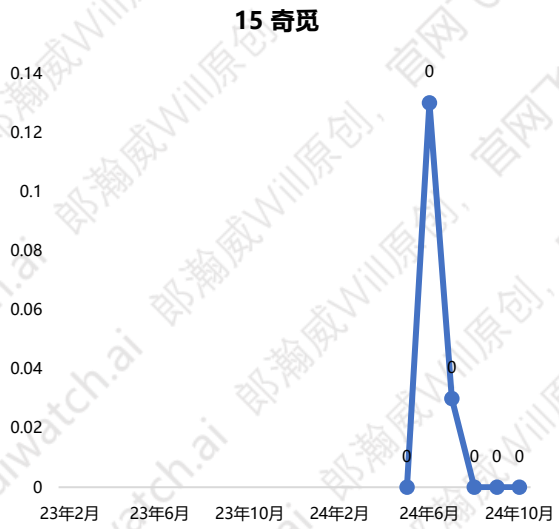


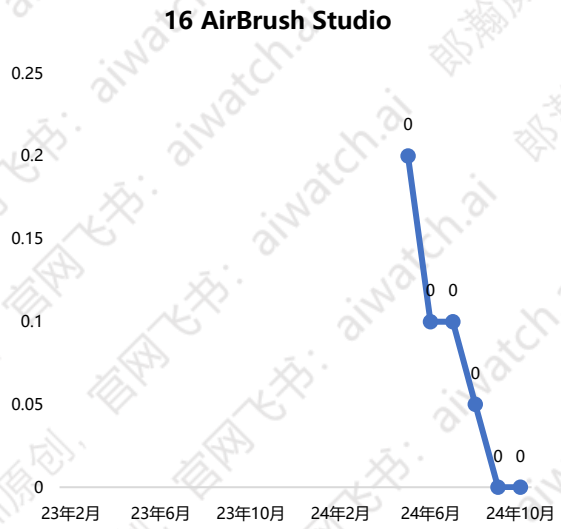












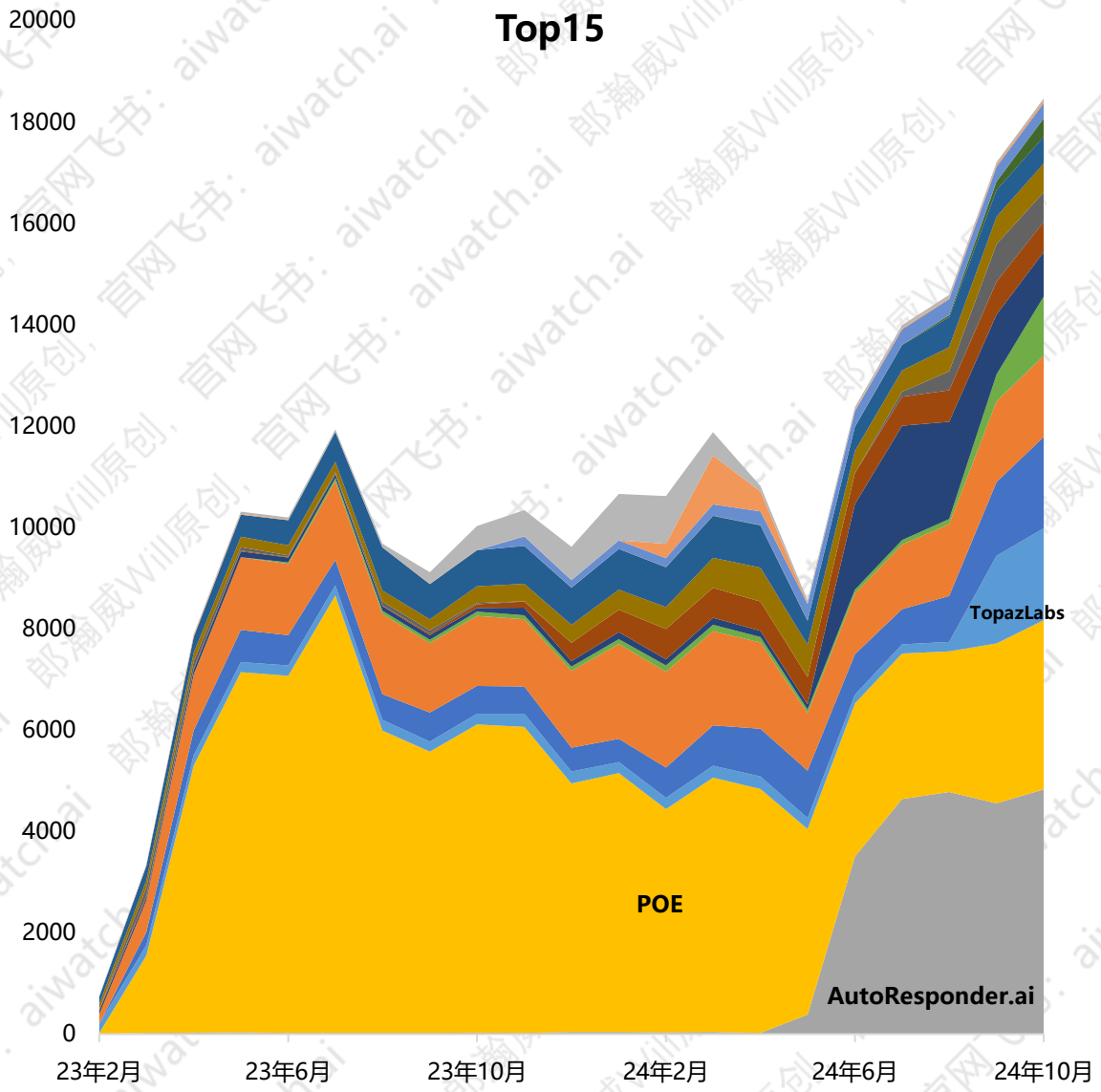
数据来源：similarweb 单位：万visit

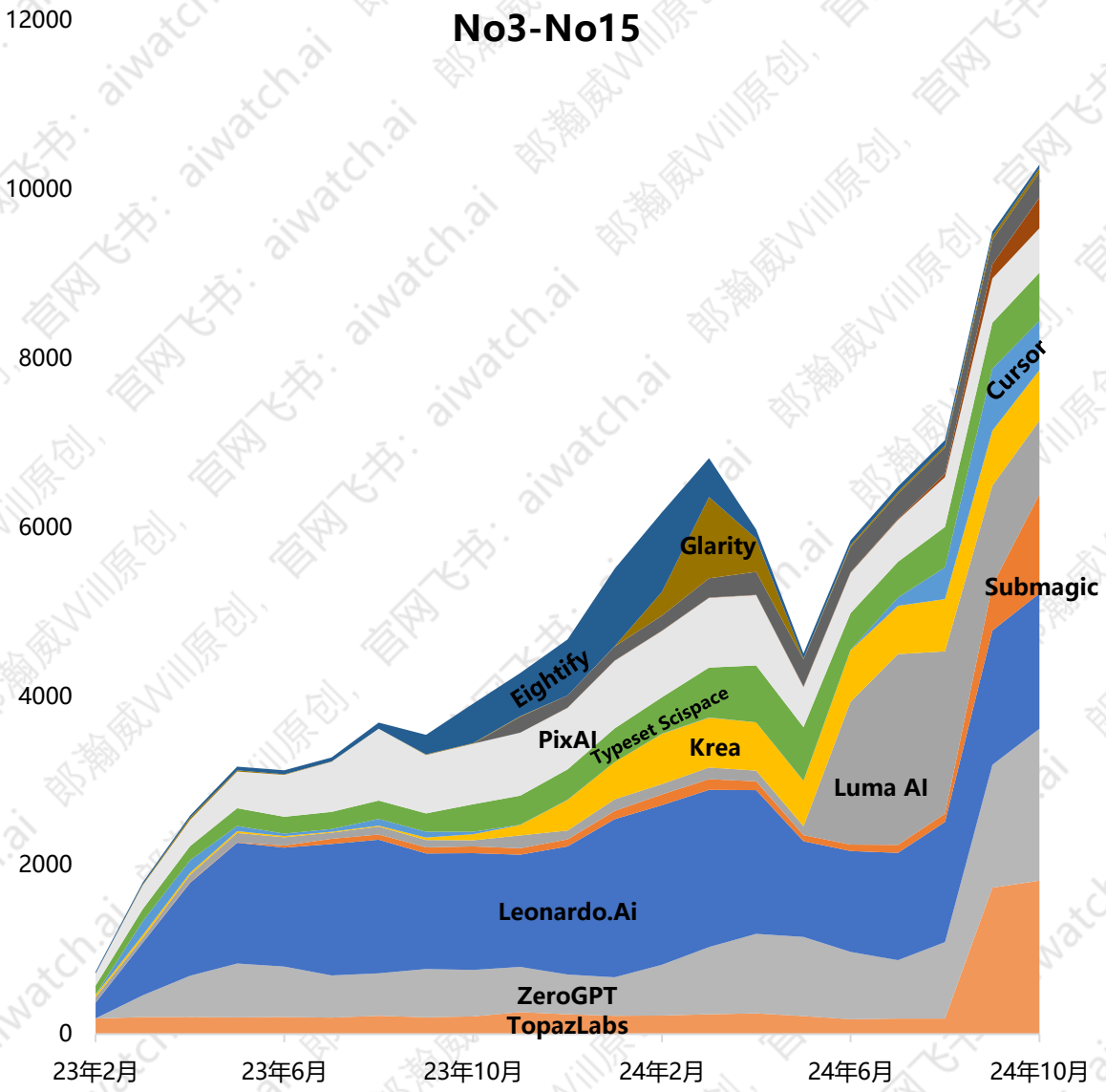
郎瀚威Will原创，官网飞书：aiwatch.ai

增长鬼才

增长鬼才

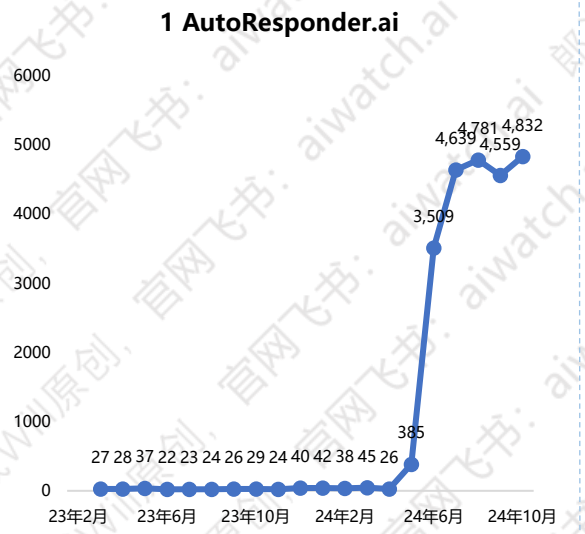
增长鬼才 网页流量趋势 10月总量：6399万

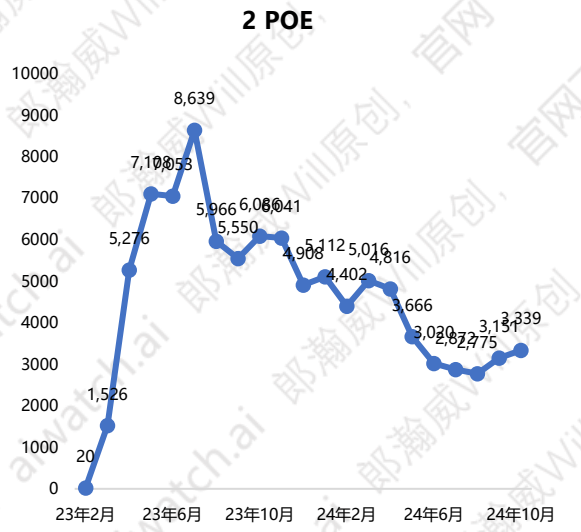


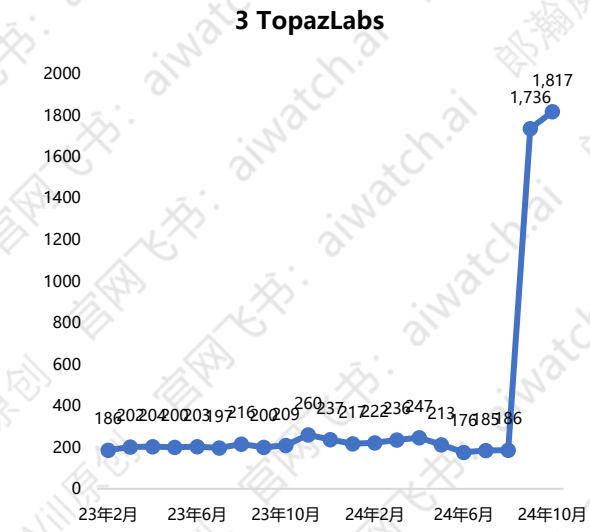


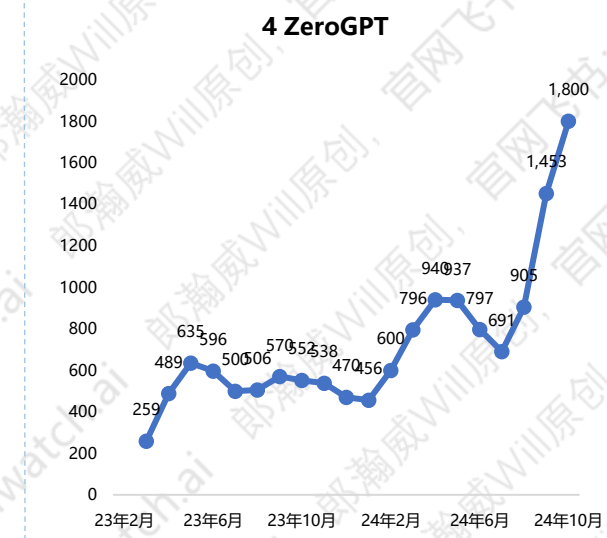
数据来源：similarweb 单位：万visit

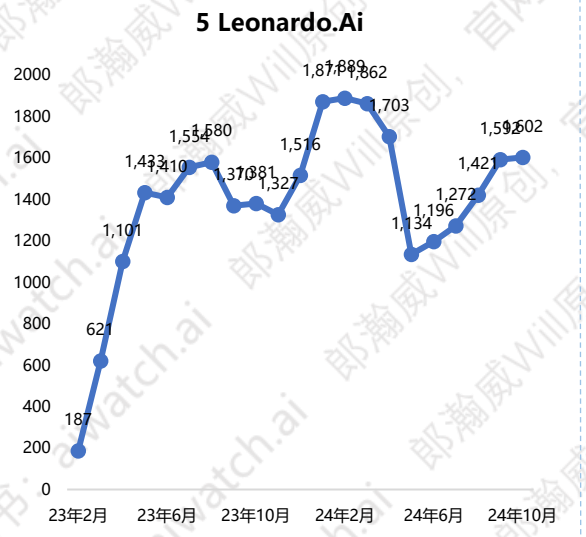
增长鬼才- No.1-No.8

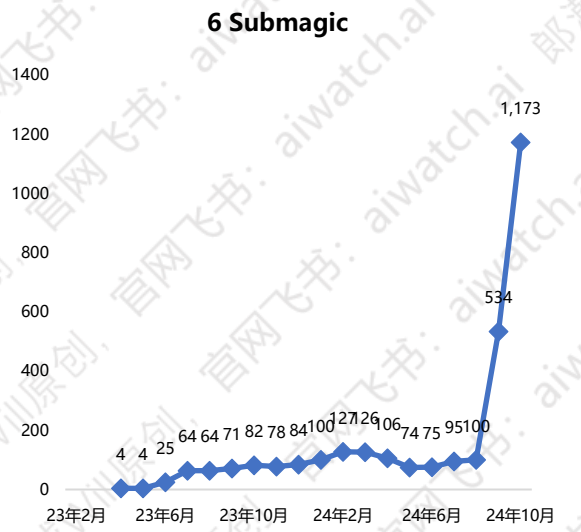


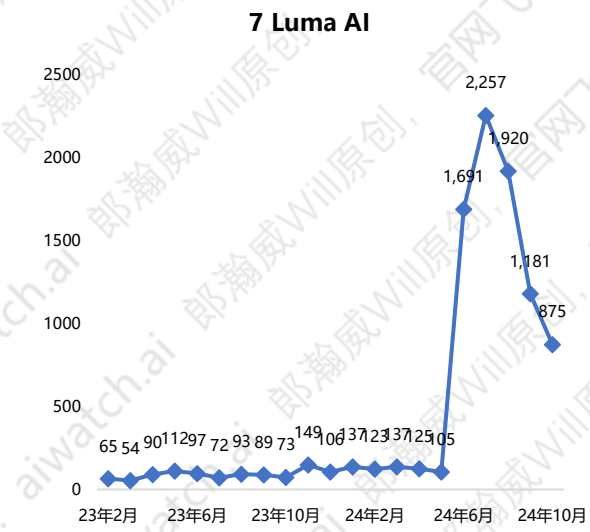


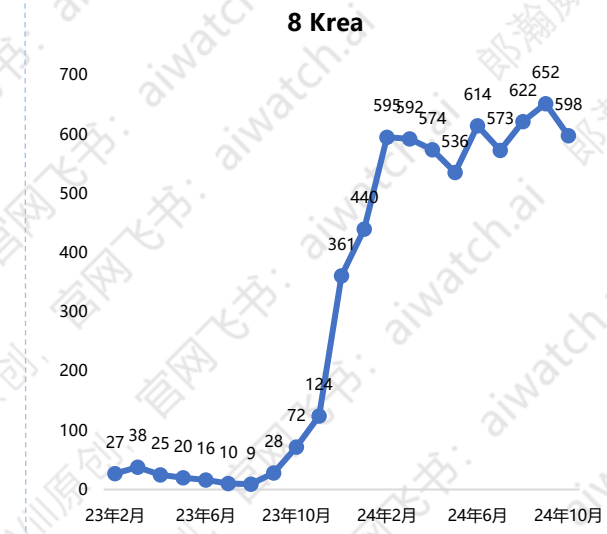








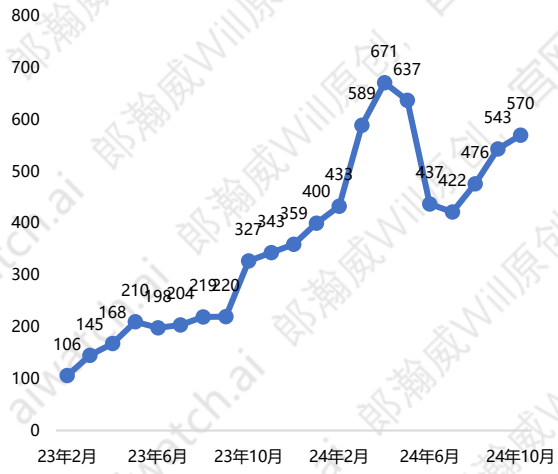


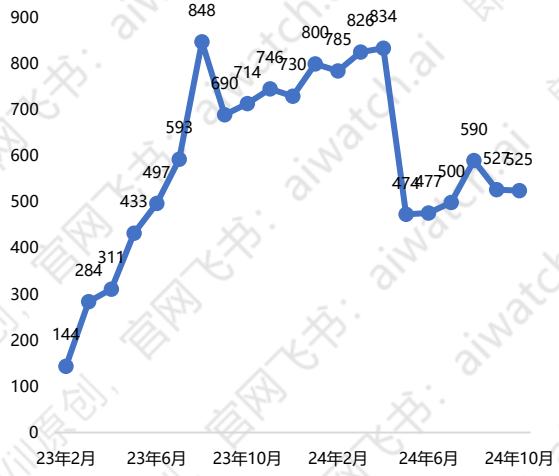


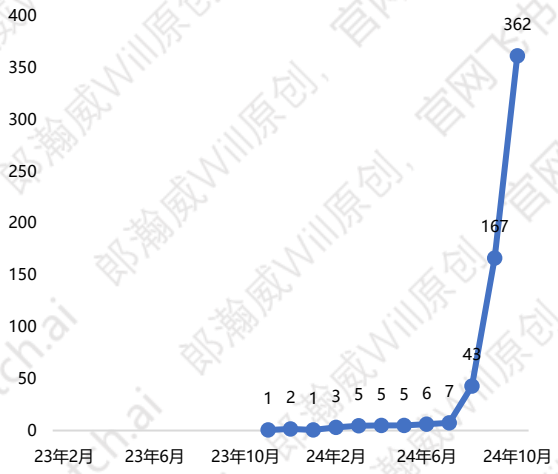
数据来源：similarweb 单位：万visit

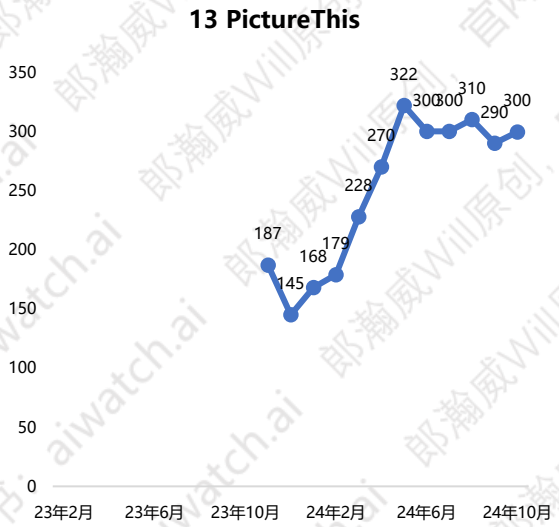
郎瀚威Will原创，官网飞书：aiwatch.ai

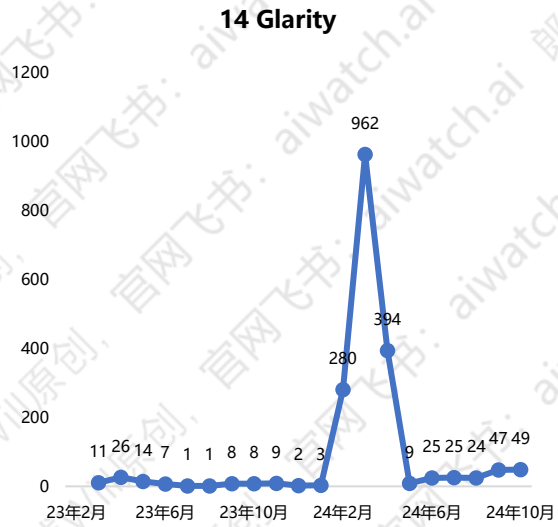
增长鬼才- No.9-No.15

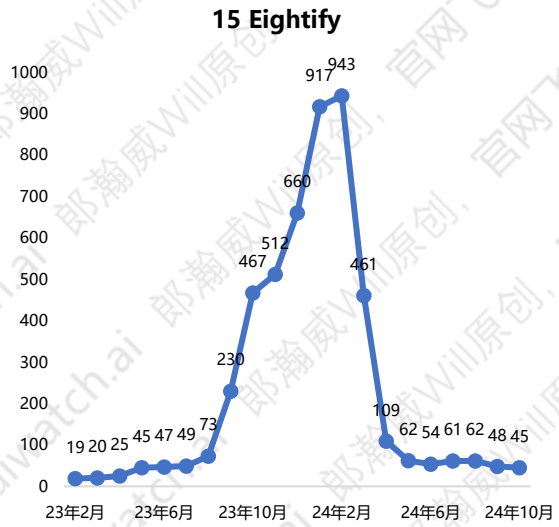












数据来源：similarweb 单位：万visit

社交增长

社交增长

社交增长– Takeaway

1. 我认为社交增长在2025年肯定会出现爆款
2. 我个人使用体验是，结构化，高质量数据+好的大模型=好的输出。
3. 2024年爆火的几个产品，特点之一都是基于twitter/linkedin等共有数据，结合Claude，产生社交传播的内容。

   没列上来的还有，Elevenlabs的新玩法等。

4. 以下是平台分类：

   兴趣爱好平台：豆瓣：电影，读书，音乐——对应的海外的goodread，sportify等

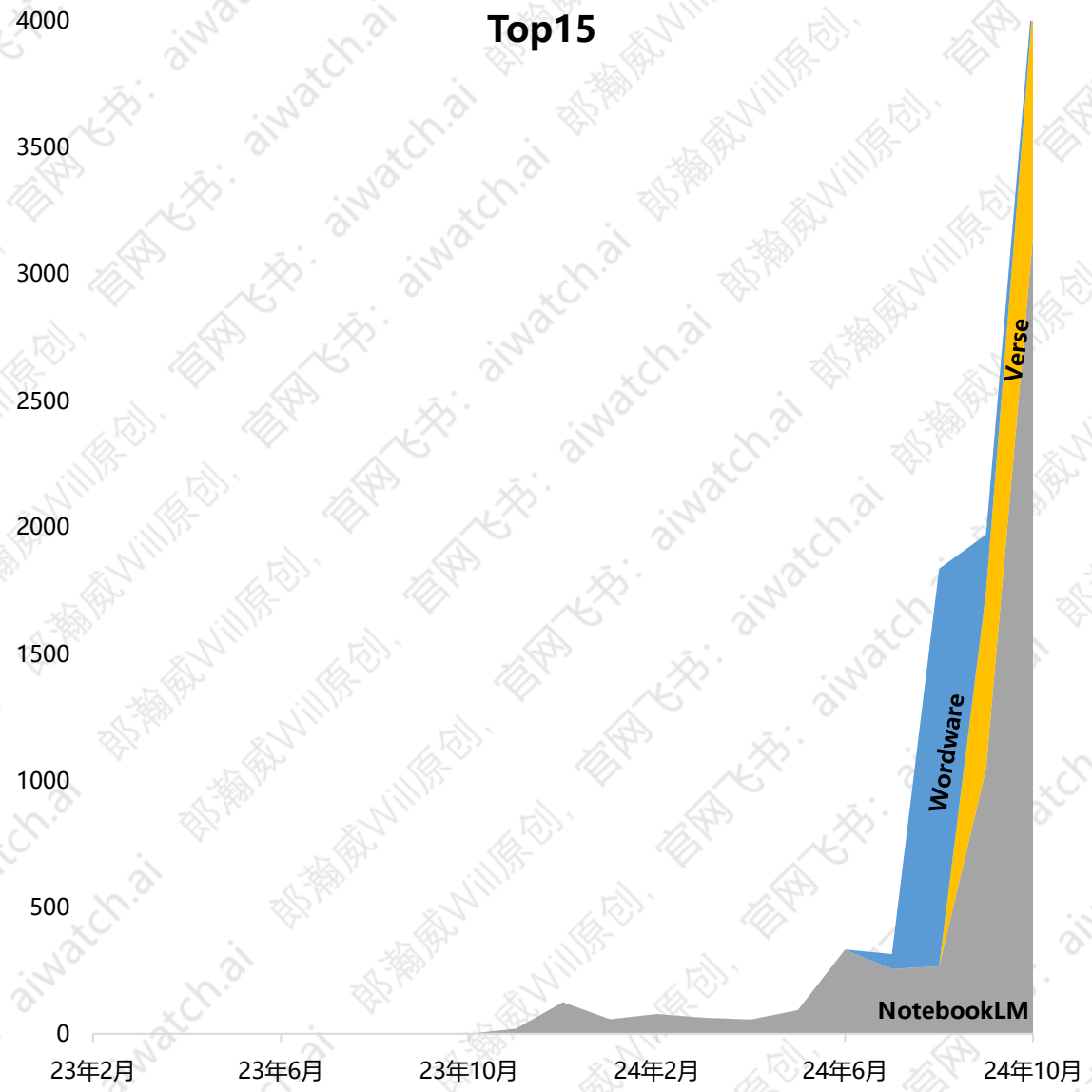
   综合观点平台：推特——微信朋友圈，抖音

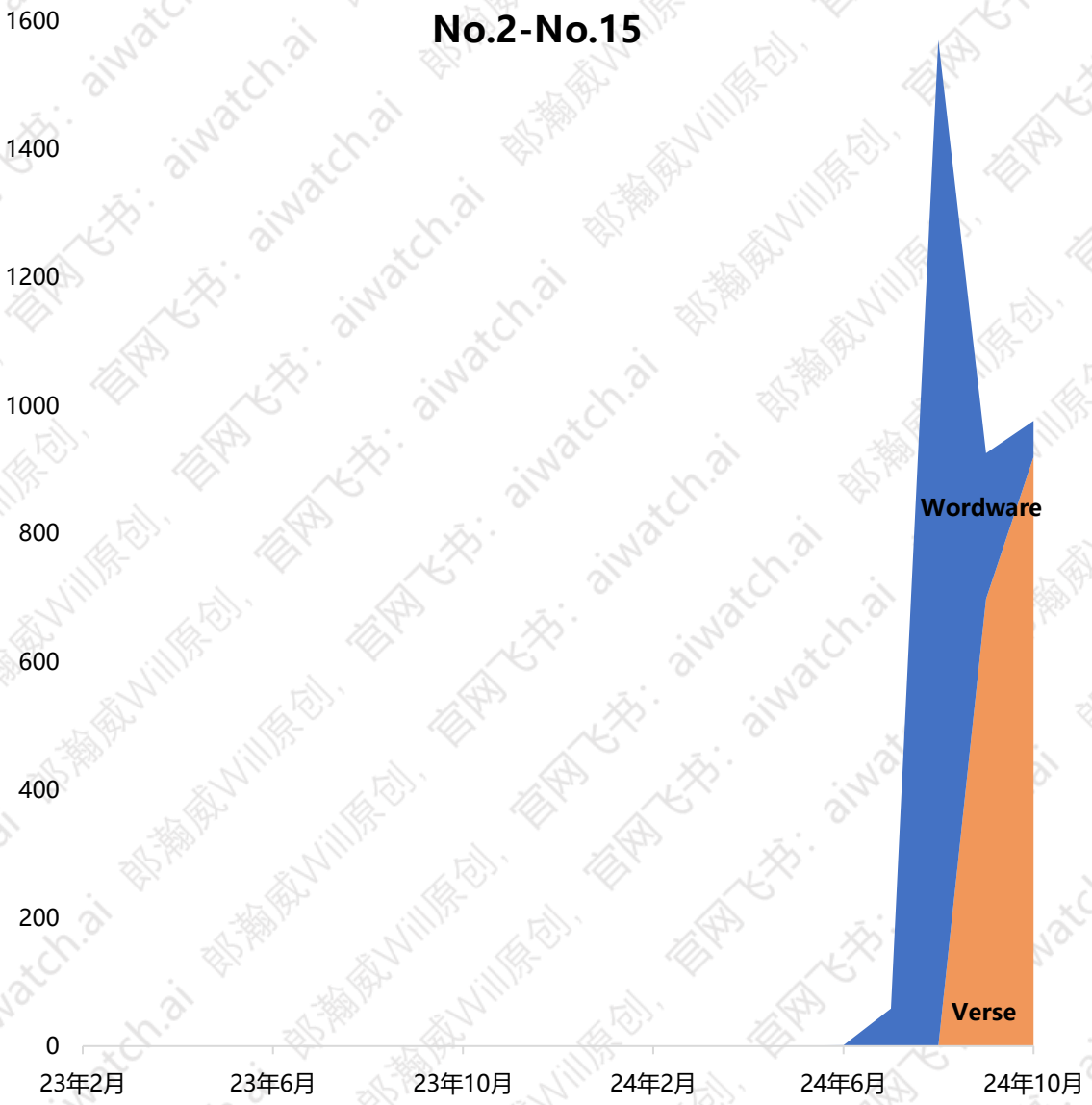
   职场数据：linkedin——脉脉
5. 最后归纳为，我们的数据在哪里，谁拥有，是否公开?
6. 有开放API的平台，可能更容易做出成果。

数据来源：similarweb 单位：万visit

郎瀚威Will原创，官网飞书：aiwatch.ai

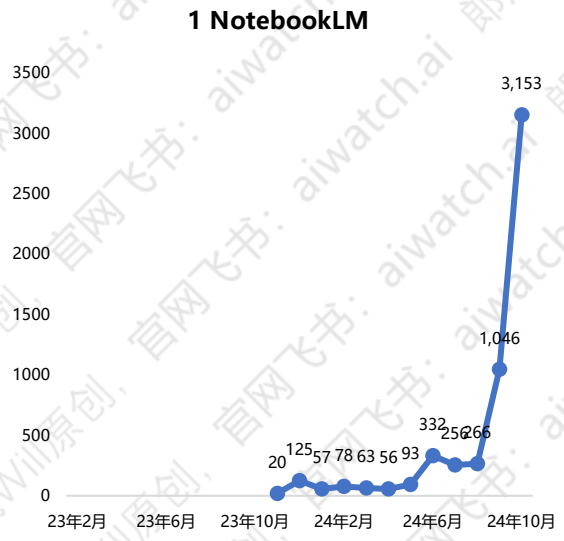
社交增长 2023.2~2024.10 网页流量趋势

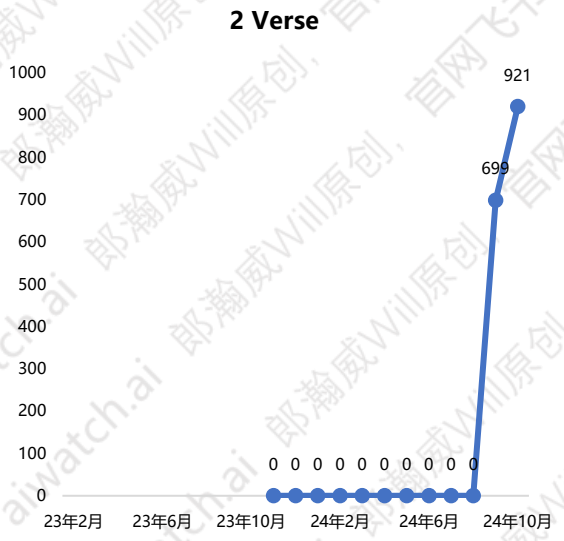


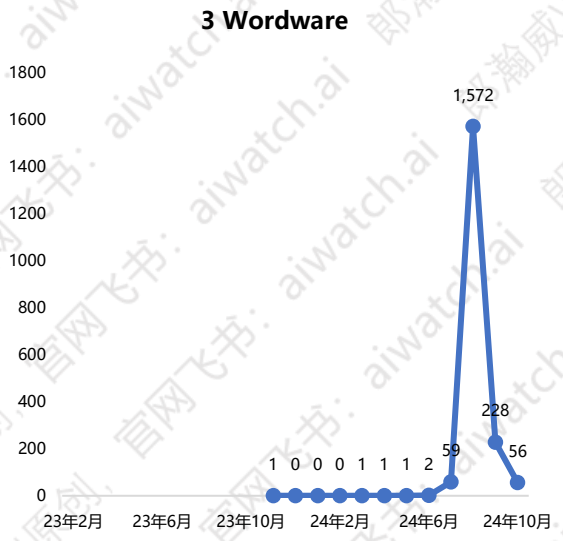


数据来源：similarweb 单位：万visit

社交增长- No.1-No.8







数据来源：similarweb 单位：万visit

YC-22

YC-22

YC-22 - Takeaway

1. 2024年10月，YC-22 Top15网站的总访问量达到2524万次。
2. 排名前三的Verse、Clinikally和Julius流量遥遥领先，其中Verse以921万次访问量高居榜首。
3. 增速方面，整体Top15中增速最显著的是新兴网站，尽管Phind流量下降显著（-67%），其他网站增长平稳。
4. 新兴的DimOrder和Humand等网站在垂直领域逐步崭露头角，尤其在效率工具和细分市场上表现突出。
5. 从流量结构来看，流量占比逐渐分散化，显示出市场格局的变化与新的机会点。
6. 此外，Dealls和Hyperbeam等高增长潜力网站值得关注，尤其是其快速布局的全球化扩展战略。

数据来源：similarweb 单位：万visit

YC-22 - Top15

➢ **Top15 总网页流量：2524万次visit**

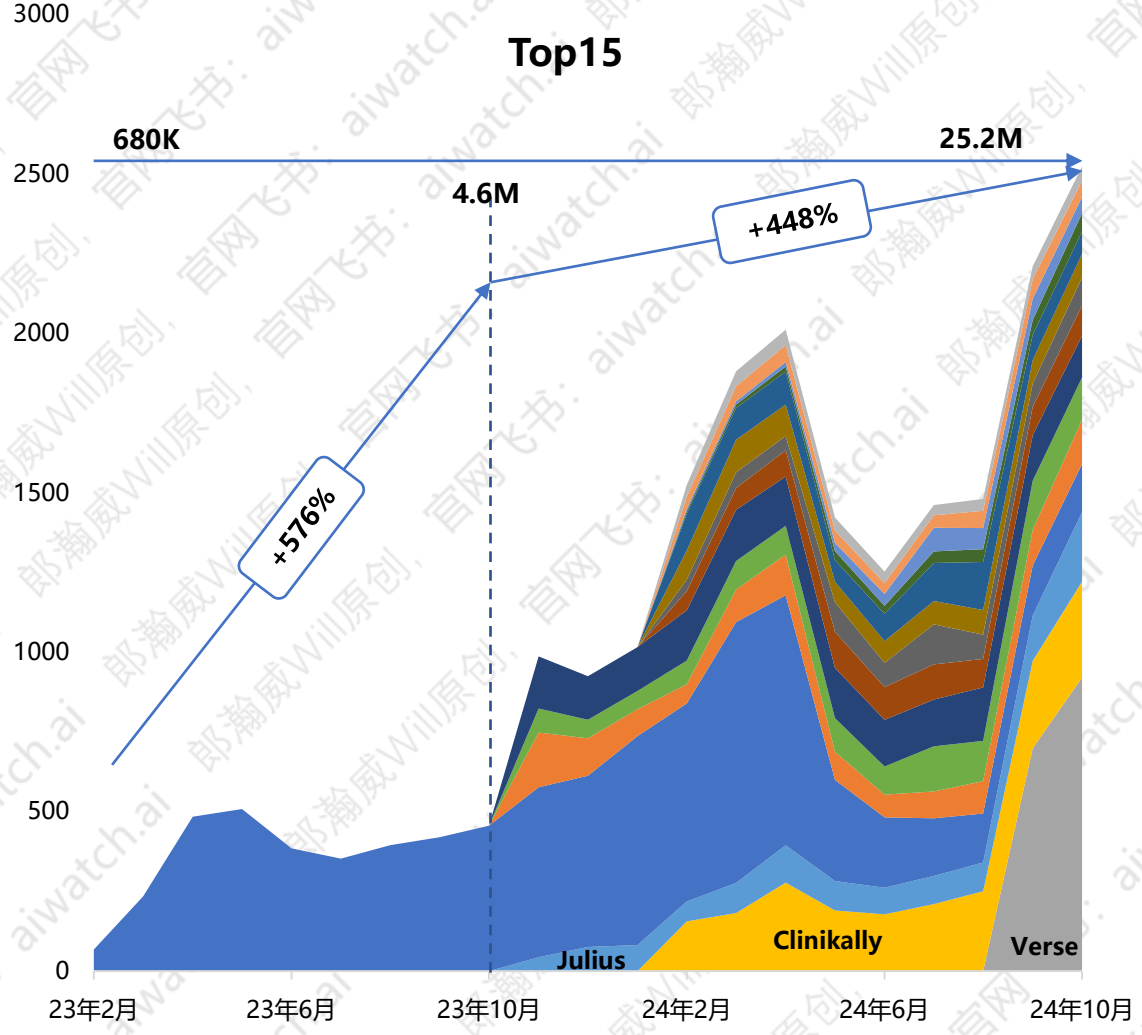
序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化
1	Verse		921	-
2	Clinikally		301	-
3	Julius		218	-
4	Phind	456	151	-67%
5	Andi		139	-
6	Dealls		133	-
7	Hyperbeam		131	-
8	Vendoo		95	-
9	DimOrder		88	-
10	Relay Health		74	-
11	Take App		70	-
12	Humand		57	-
13	Optery		51	-
14	Azuki		51	-
15	Loops		45	-

数据来源：similarweb 单位：万visit

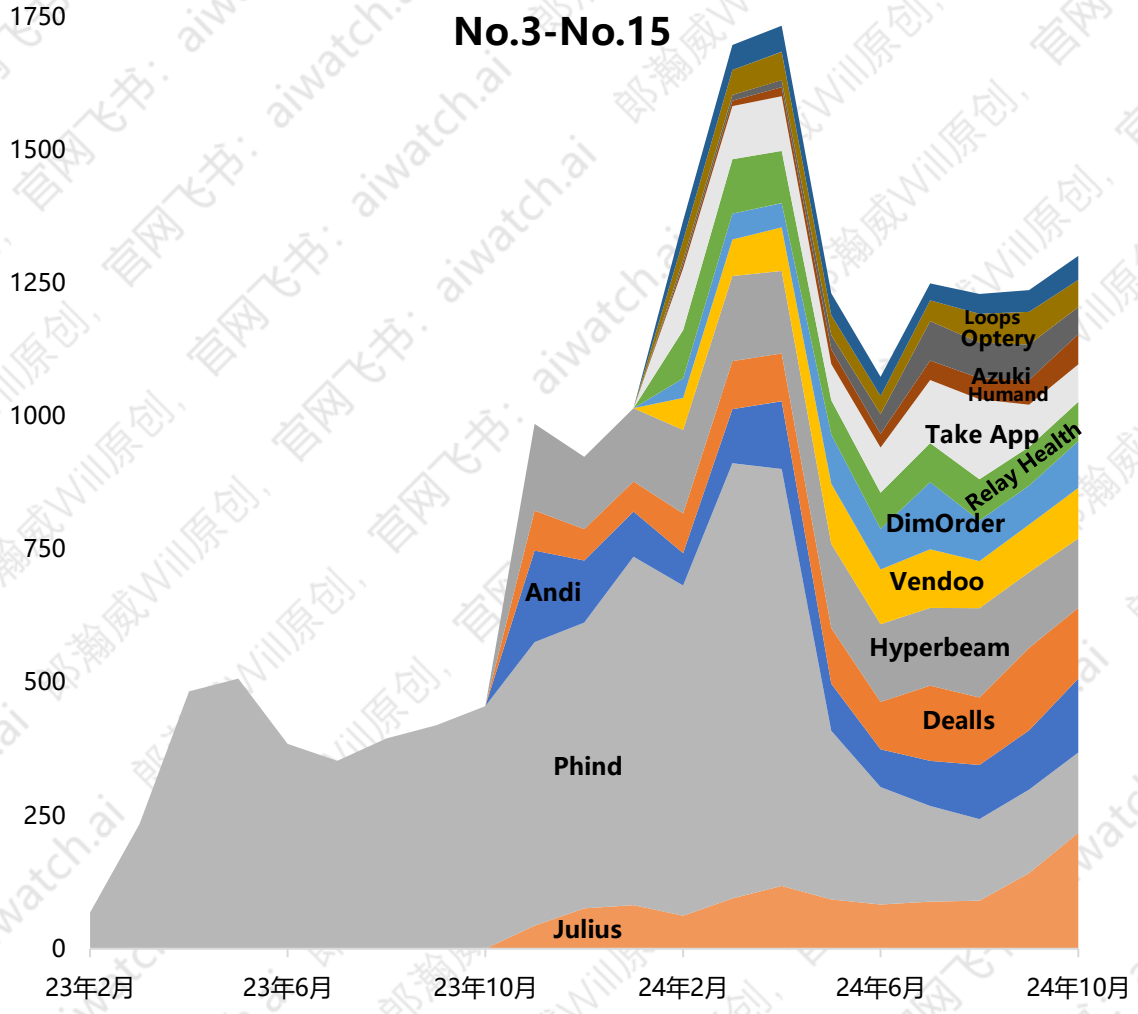
郎瀚威Will原创，官网飞书：aiwatch.ai

YC-22 网页流量趋势 10月总量：2524万

- Verse作为榜首，以921万的访问量遥遥领先，占据总流量的36.5%，Clinikally和Julius分别以301万和218万的访问量紧随其后，显示出强劲的增长势头



- 第4至第8名企业Phind、Andi、Dealls等的访问量都在90-150万之间，形成第二梯队，后七名企业（DimOrder到Loops）访问量相对较小，但保持稳定增长，显示出市场仍有发展空间

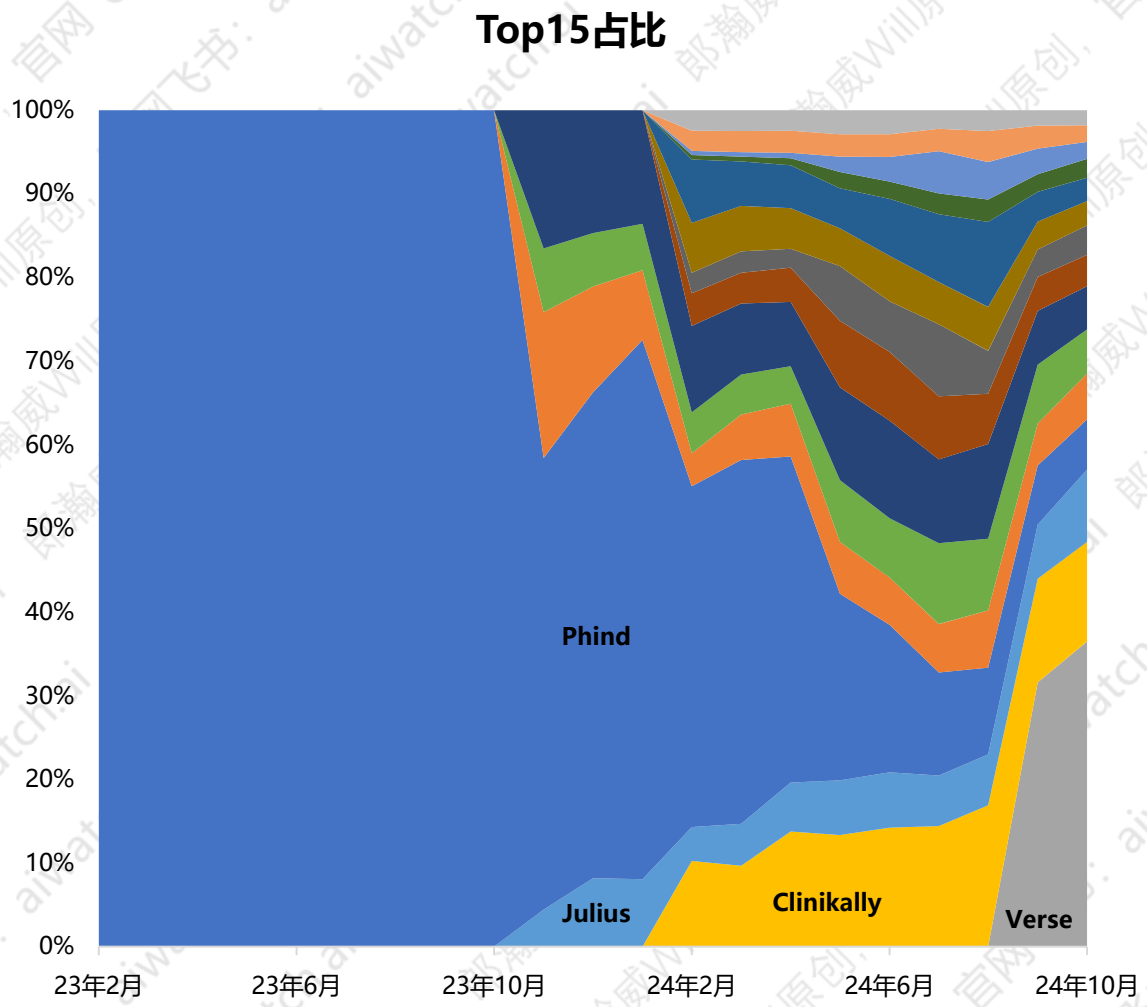


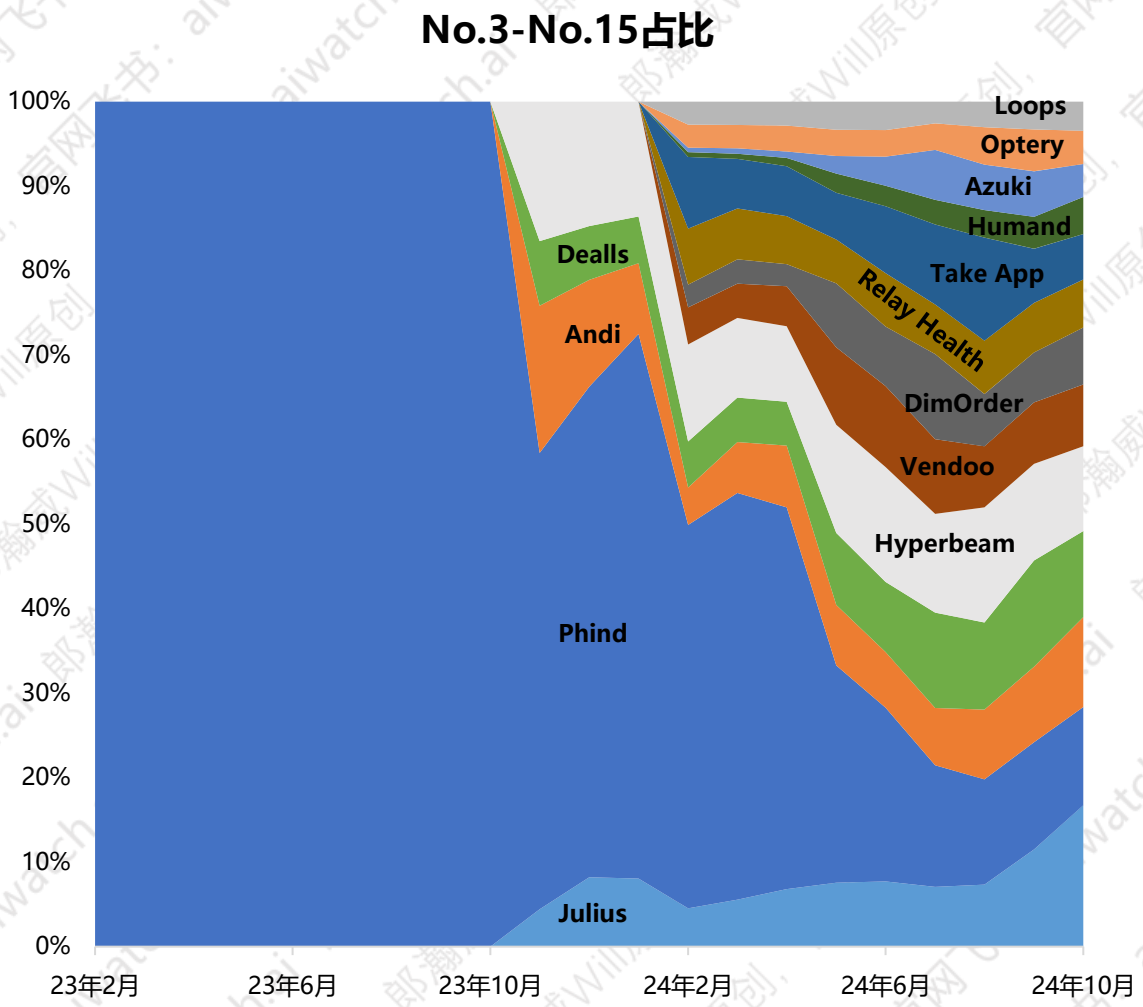
数据来源：similarweb 单位：万visit

YC-22 2023.2~2024.10 网页流量占比

- 从23年2月到24年10月的占比变化图显示，市场格局发生显著变化，从最初Phind一家独大，演变为多家企业共同分享市场，Verse、Clinikally和Julius的崛起，打破了原有的市场结构，形成新的竞争格局

- 整体市场呈现多元化发展趋势，从单一主导转向多极化竞争，新进入者（如Verse、Clinikally）的快速崛起表明市场仍处于快速发展阶段，竞争格局尚未完全稳定





数据来源：similarweb 单位：万visit

YC-23

YC-23

YC-23 - Takeaway

1. 2024年10月，YC-23 Top15网站的总访问量达到1396万次。
2. Vendah以605万次访问量稳居榜首，PlayHT和SuperKalam分别位列第二和第三，其中PlayHT实现33%的年度增长。
3. 增速方面，整体Top15网站的增长动能强劲，特别是Vendah的流量在保持领先的同时拉动整体规模增长。
4. 尽管MediSearch流量下降了54%，但其在细分领域的用户群仍具有较强粘性。
5. 新兴的网站如Refine和FlowiseAI在技术支持和工具类服务方面表现出较大潜力，吸引了更多关注。
6. 从流量分布来看，Vendah和PlayHT合计占据大部分市场份额，其他后起之秀呈现逐步崛起的趋势。
7. 特别值得关注的是NextUI和EzDubs，这类在设计和内容生成领域的新兴平台，正在快速提升自身的市场影响力。

数据来源：similarweb 单位：万visit

YC-23 - Top15

➢ **Top15 总网页流量：1396万次visit**

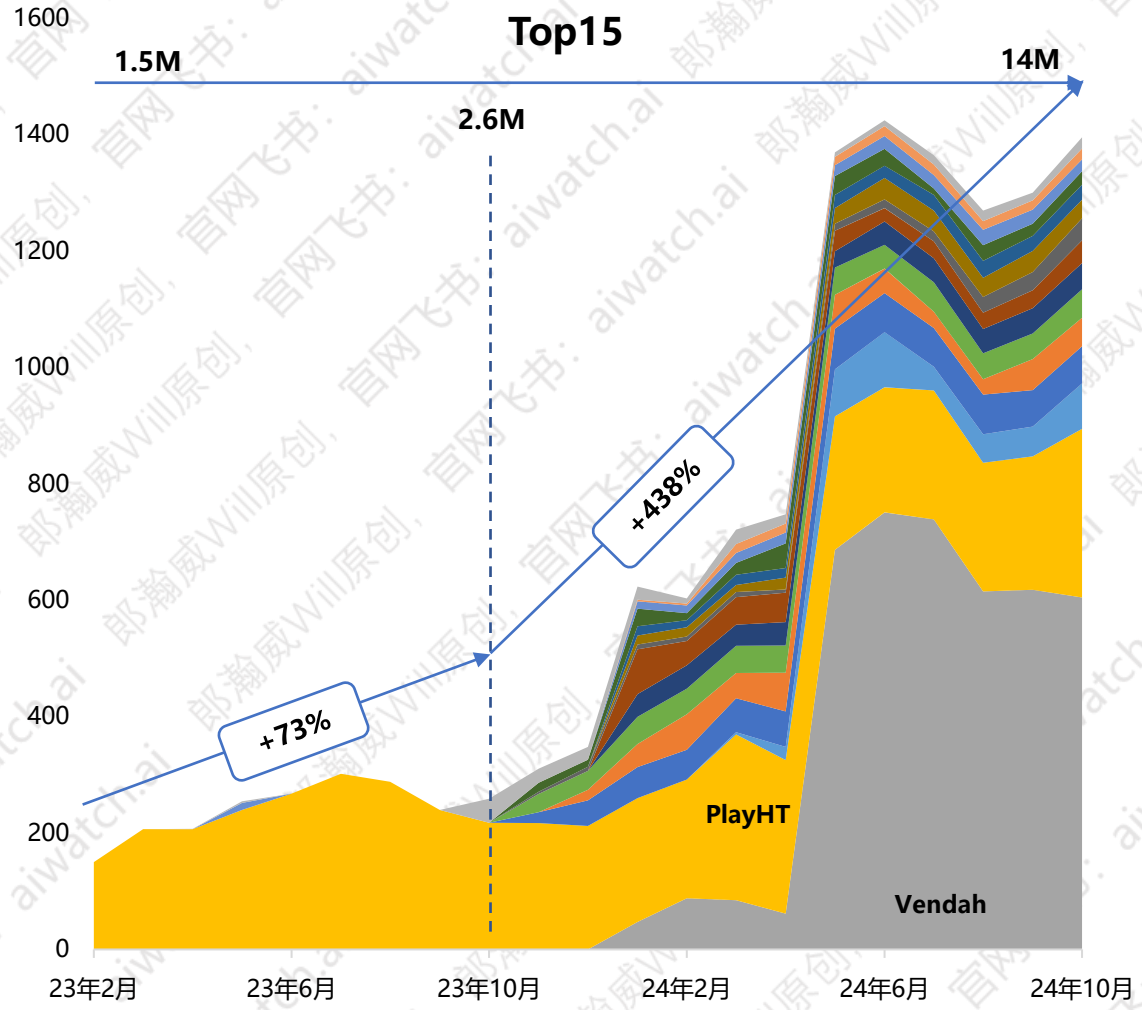
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	Vendah		605	-
2	PlayHT	218	290	33%
3	SuperKalam		78	-
4	NextUI		64	-
5	Decohere		49	-
6	Refine		49	-
7	Resend		45	-
8	reworkd.ai		39	-
9	Continue		38	-
10	Roame		32	-
11	Tiptap		26	-
12	EzDubs		23	-
13	FlowiseAI		20	-
14	Vellum		19	-
15	MediSearch	41	19	-54%

数据来源：similarweb 单位：万visit

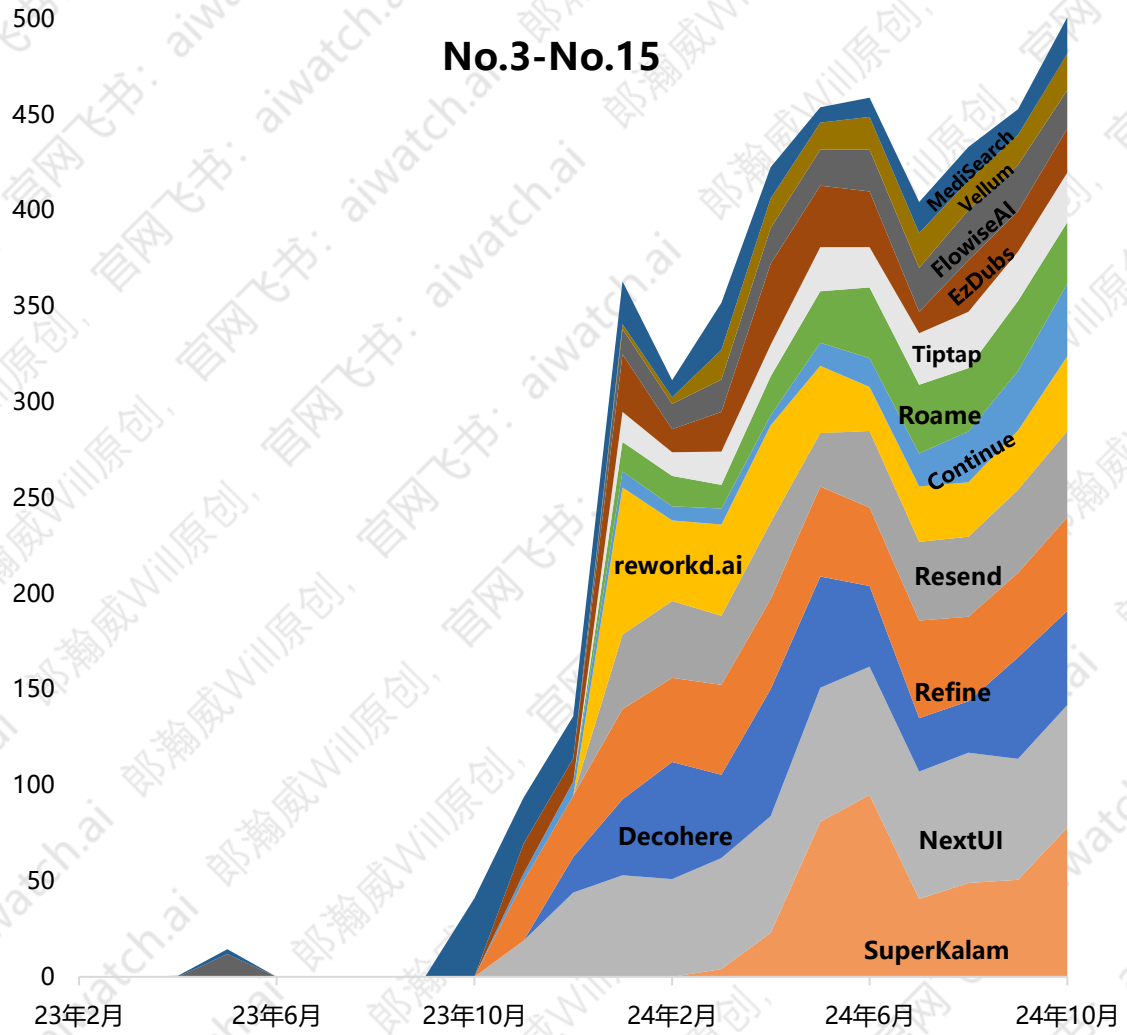
官网飞书：aiwatch.ai 郎瀚威Will原创

YC-23 网页流量趋势 10月总量：1396万

- Vendah作为市场领导者，以605万访问量独占鳌头，占据总流量的43.3%，PlayHT表现亮眼，不仅实现33%的同比增长，还以290万的访问量稳居第二，显示出强劲的发展势头



- 第3至第7名企业SuperKalam、NextUI、Decohere等访问量在40-80万之间，形成稳定的第二梯队，后八名企业reworkd.ai到MediSearch访问量相对集中在20-40万之间，市场竞争激烈

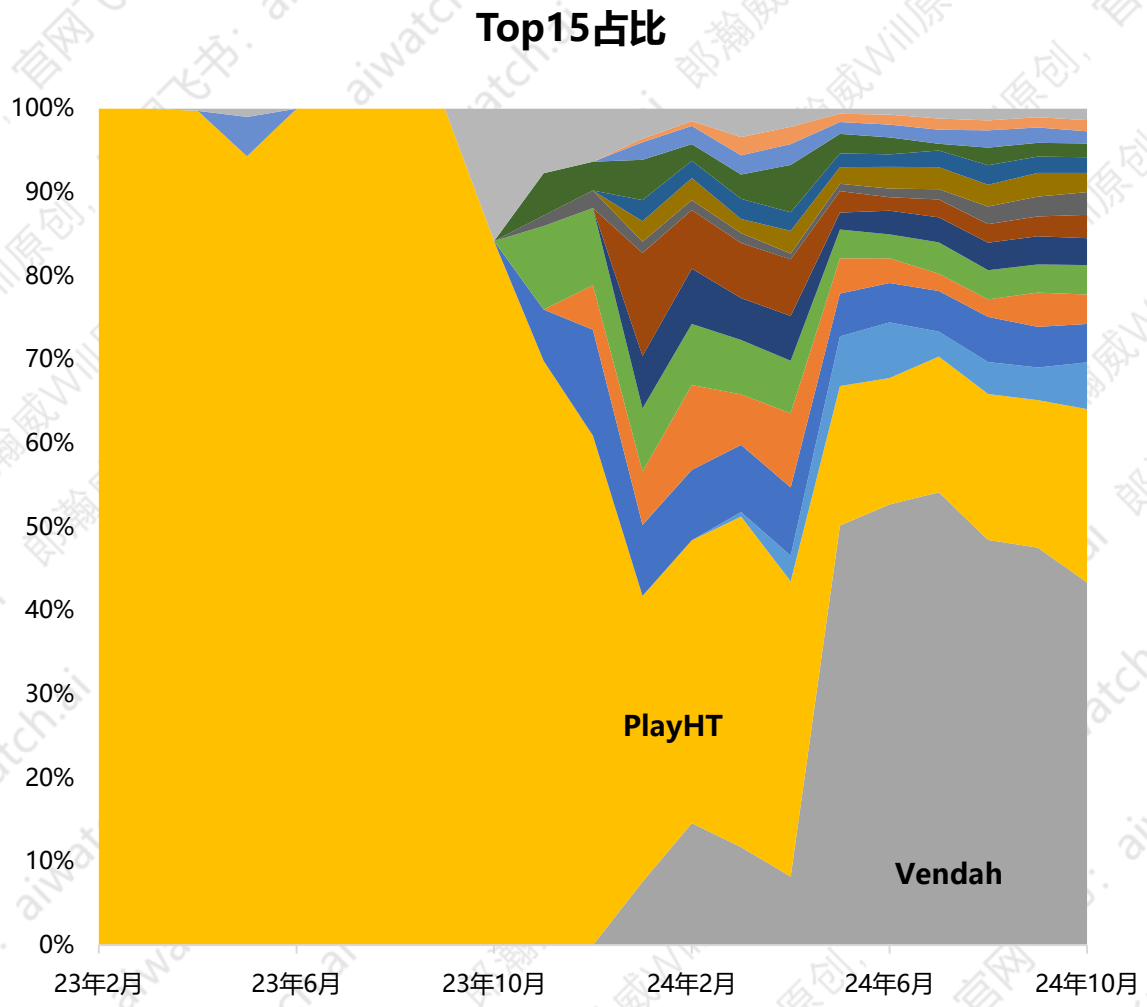


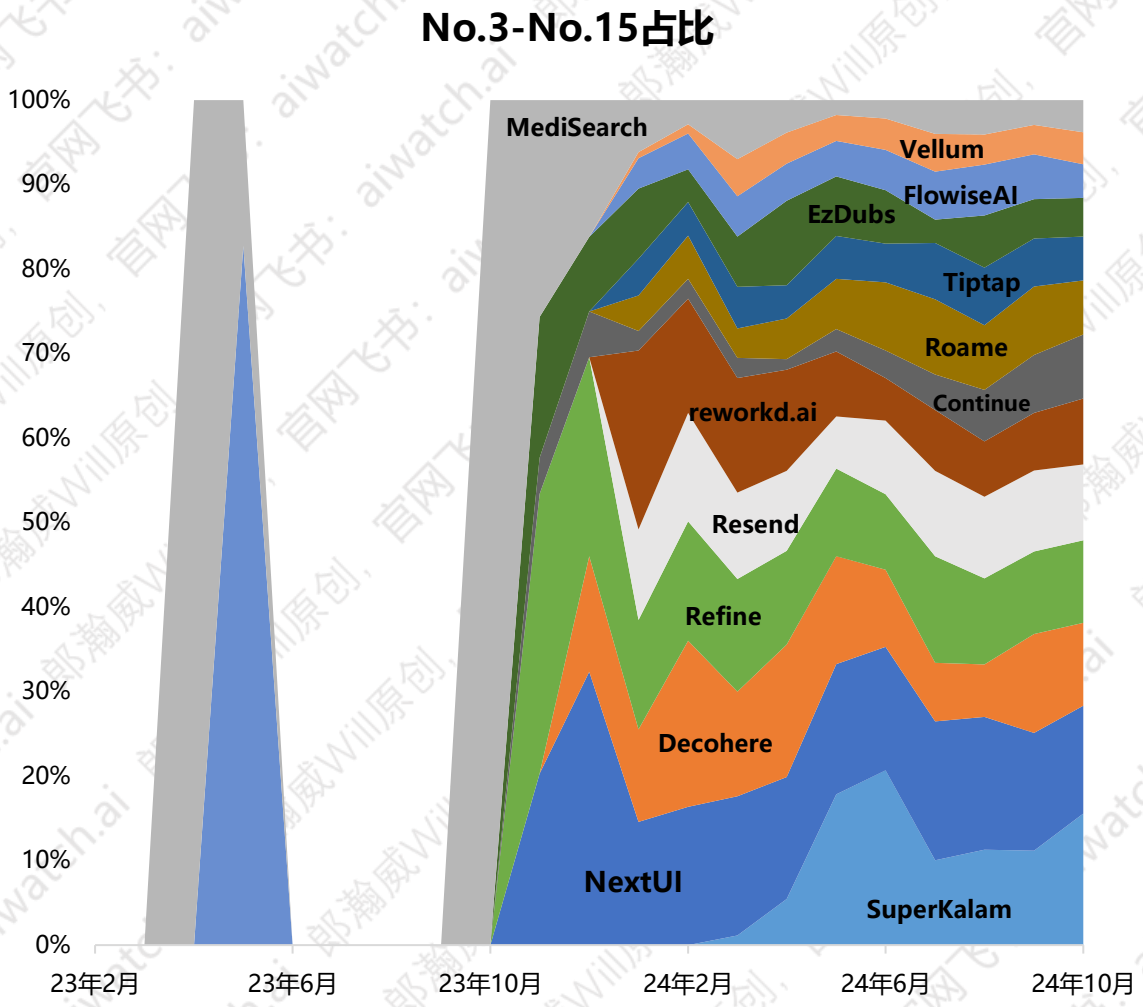
数据来源：similarweb 单位：万visit

YC-23 2023.2~2024.10 网页流量占比

- 整体市场格局呈现"双强多强"的竞争态势，头部企业优势明显，直到24年10月的占比变化显示，市场结构经历了从PlayHT主导到Vendah崛起的转变

- No3-No15的占比相对稳定，表明市场已形成相对成熟的竞争体系，各企业在各自细分领域形成差异化竞争，从占比图来看，市场集中度呈现先降后升的趋势，最终形成相对稳定的分层格局





数据来源：similarweb 单位：万visit

YC-24

YC-24

YC-24 - Takeaway

1. 2024年10月，YC-24 Top15网站的总访问量达到661万次。
2. VideoGen以131万次访问量稳居榜首，Mathos和MagicHour分别位列第二和第三，其中MagicHour增长惊人，年度增幅高达3178%。
3. 从增速来看，MagicHour以极高的增速引领榜单，显示出强劲的市场扩张能力。
4. 其他值得关注的新兴平台包括Unriddle和Wordware，在细分领域的布局初见成效。
5. 市场分布方面，VideoGen、Mathos和MagicHour占据了大部分流量，其余网站则以稳定增长拓展自身市场。
6. Pythagora (GPT Pilot)和Artisan AI等技术创新型网站逐步崭露头角，或将推动未来细分市场的进一步拓展。

数据来源：similarweb 单位：万visit

YC-24 - Top15

➢ **Top15 总网页流量：661万次visit**

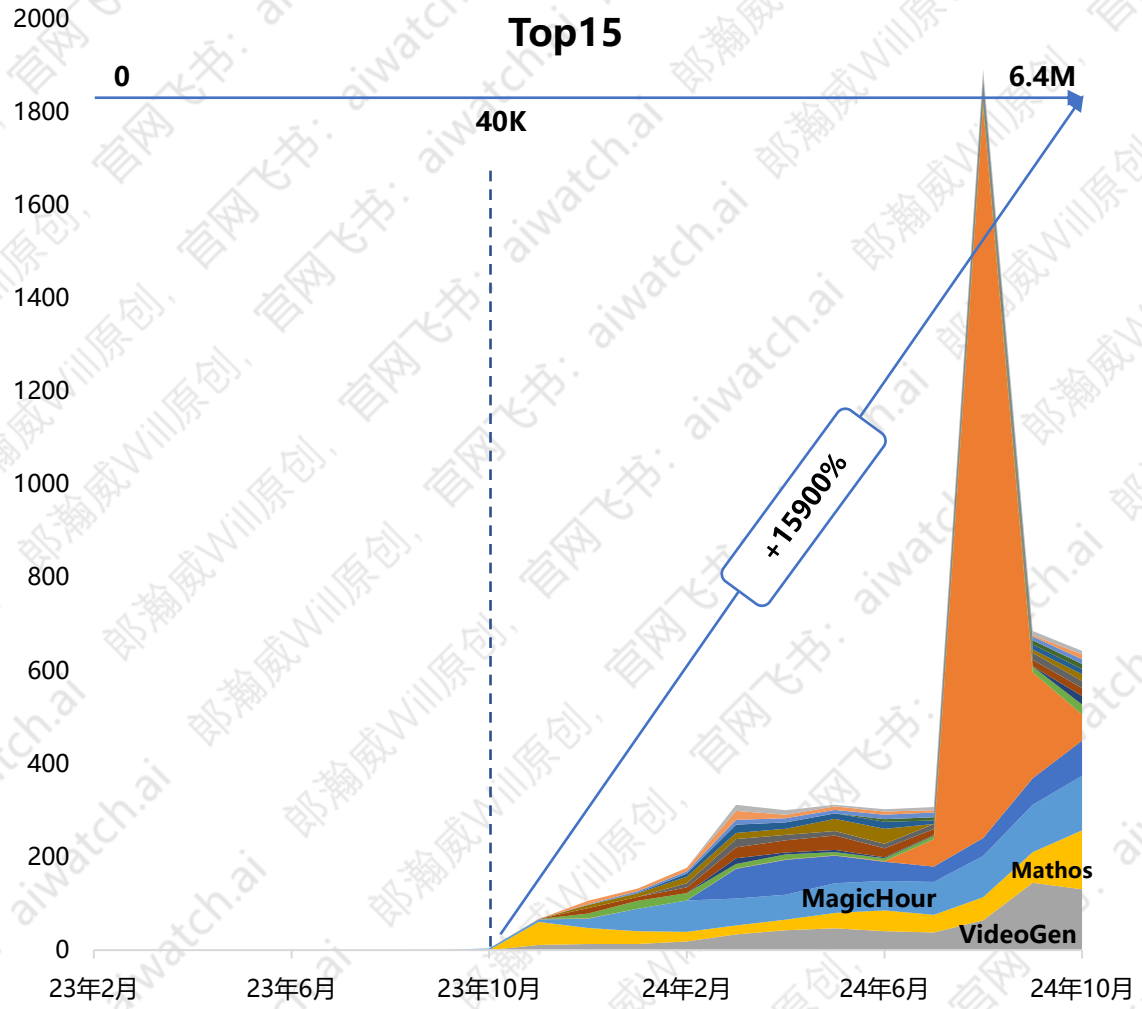
序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化
1	VideoGen		131	-
2	Mathos		126	-
3	MagicHour	4	118	3178%
4	Unriddle		75	-
5	Wordware		56	-
6	Shepherd		23	-
7	Artisan AI		21	-
8	Pythagora (GPT Pilot)		19	-
9	Cleva		17	-
10	Retell AI		15	-
11	sync.		15	-
12	David AI		13	-
13	Marblism		11	-
14	Unsloth AI		11	-
15	Million.js		10	-

数据来源：similarweb 单位：万visit

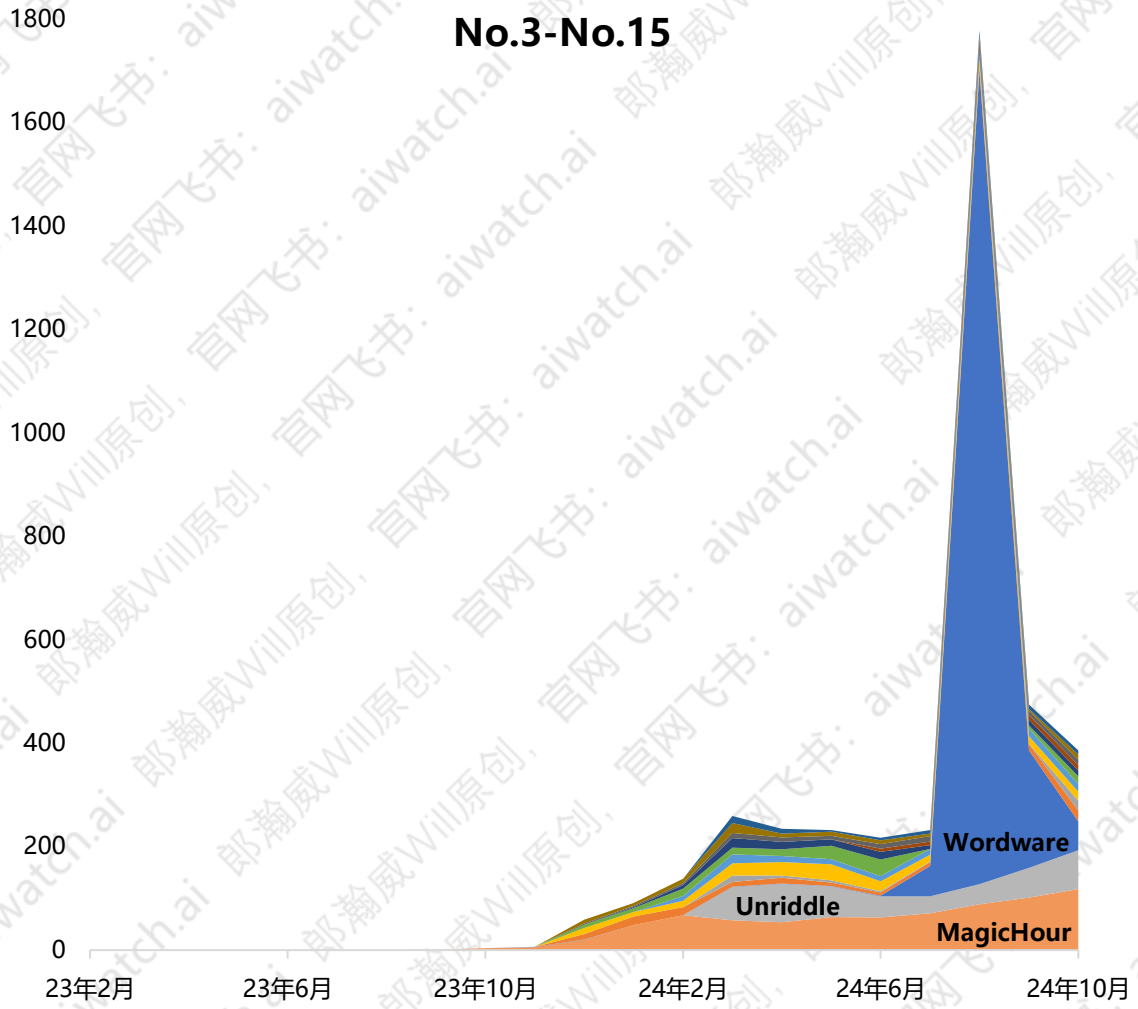
官网飞书: aiwatch.ai 郎瀚威Will原创

YC-24 网页流量趋势 10月总量：643万

- VideoGen和Mathos分别以131万和126万的访问量领跑市场，两者差距仅5万，竞争激烈，MagicHour表现最为亮眼，年度增长率达3178%，从4万暴增至118万，显示出惊人的发展潜力



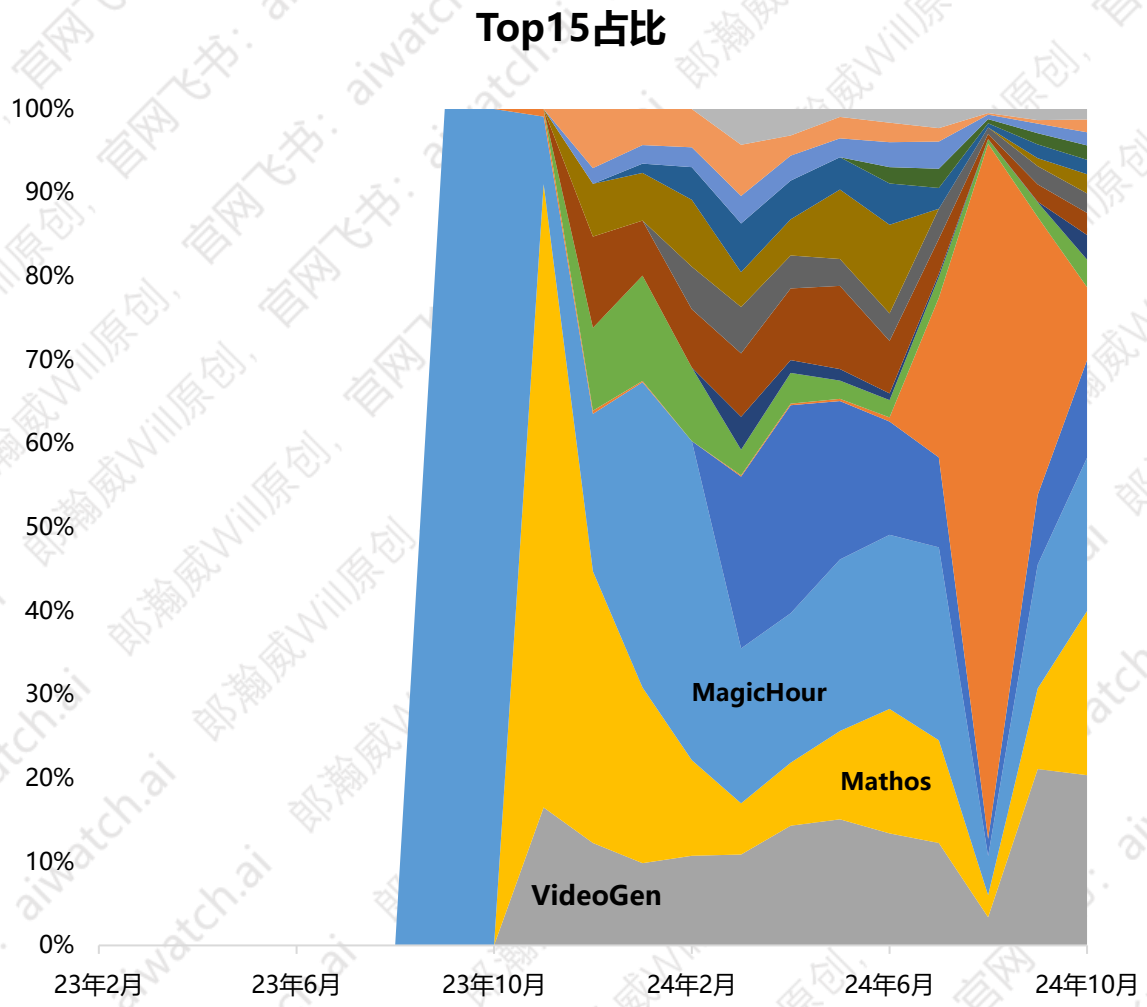
- Unriddle和Wordware分别以75万和56万的访问量形成第二梯队，与头部企业仍有较大差距，第6名到第15名的企业访问量普遍在10-23万之间，市场竞争相对平缓



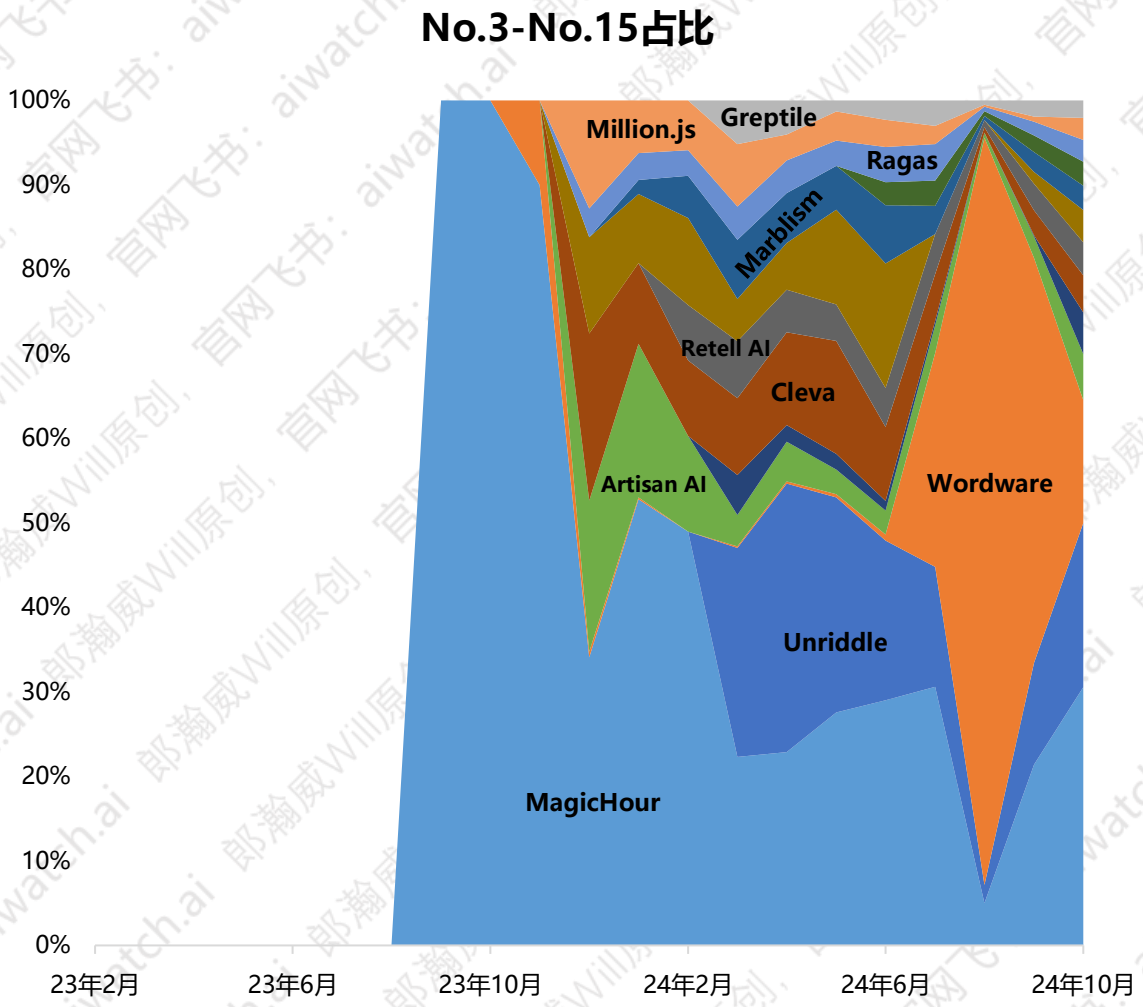
数据来源：similarweb 单位：万visit

YC-24 2023.2~2024.10 网页流量占比

- 从趋势图可以看出，市场经历了从高度分散到三强鼎立的结构性变化，Top3企业合计占据总流量的57%，市场集中度明显提升



- No3-No15占比图显示，除头部企业外，其他企业的市场份额相对稳定，形成良性竞争格局，整体市场在经历爆发式增长后逐渐趋于稳定，预示着行业正在走向成熟



数据来源：similarweb 单位：万visit

AIGrant 1&2

AIGrant 1&2

AIGrant 1&2 - Takeaway

1. 2024年10月，Algrant1&2 Top15网站的总访问量达到了1.3亿次。
2. Perplexity AI以9078万次访问量高居榜首，Pika和Pixelcut分别位列第二和第三，Pika实现了820%的高速增长。
3. Cursor的年度增长率高达1984%，表现尤为亮眼，成为增速最快的黑马。
4. 虽然Opus Clip AI和Replicate等老牌平台出现了流量下滑，但它们仍保持了核心用户基础。
5. 其他新兴平台如Recraft.AI和Akool也展现出强劲的增长势头，尤其是在细分市场中的表现令人瞩目。
6. 从市场分布来看，Perplexity AI继续主导市场，但Pika和Pixelcut等后起之秀正在逐渐蚕食市场份额。
7. 未来可关注Cursor和Recraft.AI在工具类和创意生成领域的潜力，这类平台或将成为推动流量和技术进步的关键力量。

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

AIGrant1&2 - Top15

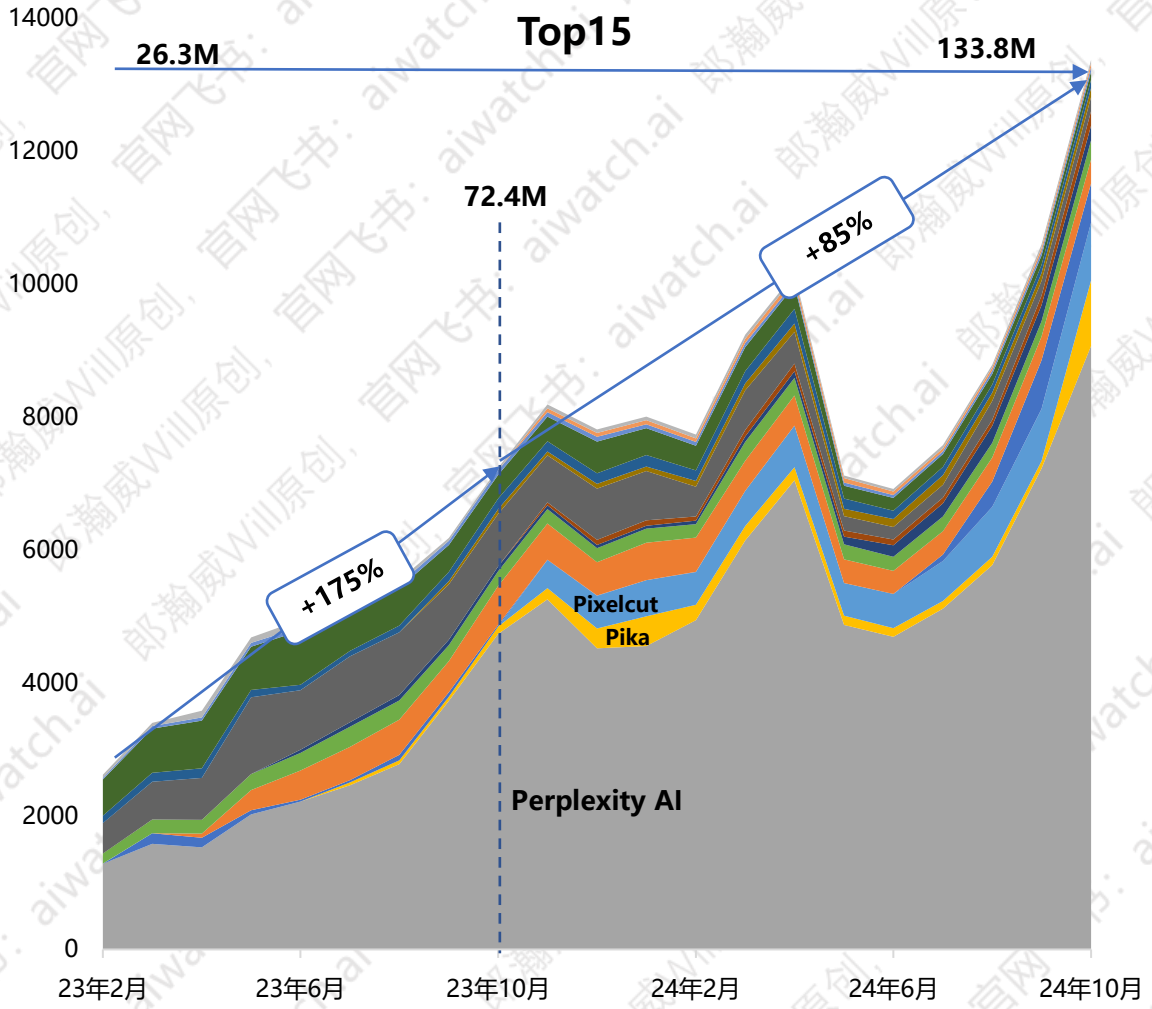
➢ **Top15 总网页流量：1.3亿次visit**

序号	产品名称	23年10月 (万visit)	24年10月 (万visit)	年度变化
1	Perplexity AI	4,747	9,078	91%
2	Pika	107	984	820%
3	Pixelcut		874	-
4	Cursor	28	583	1984%
5	Opus Clip AI	587	363	-38%
6	PlayHT	218	290	33%
7	Recraft.AI	73	220	201%
8	Julius		218	-
9	Replicate	792	211	-73%
10	Akool	70	136	95%
11	Jenni	161	124	-23%
12	Lexica	355	121	-66%
13	Freed		72	-
14	RunPod	69	67	-3%
15	Mathpix		59	-

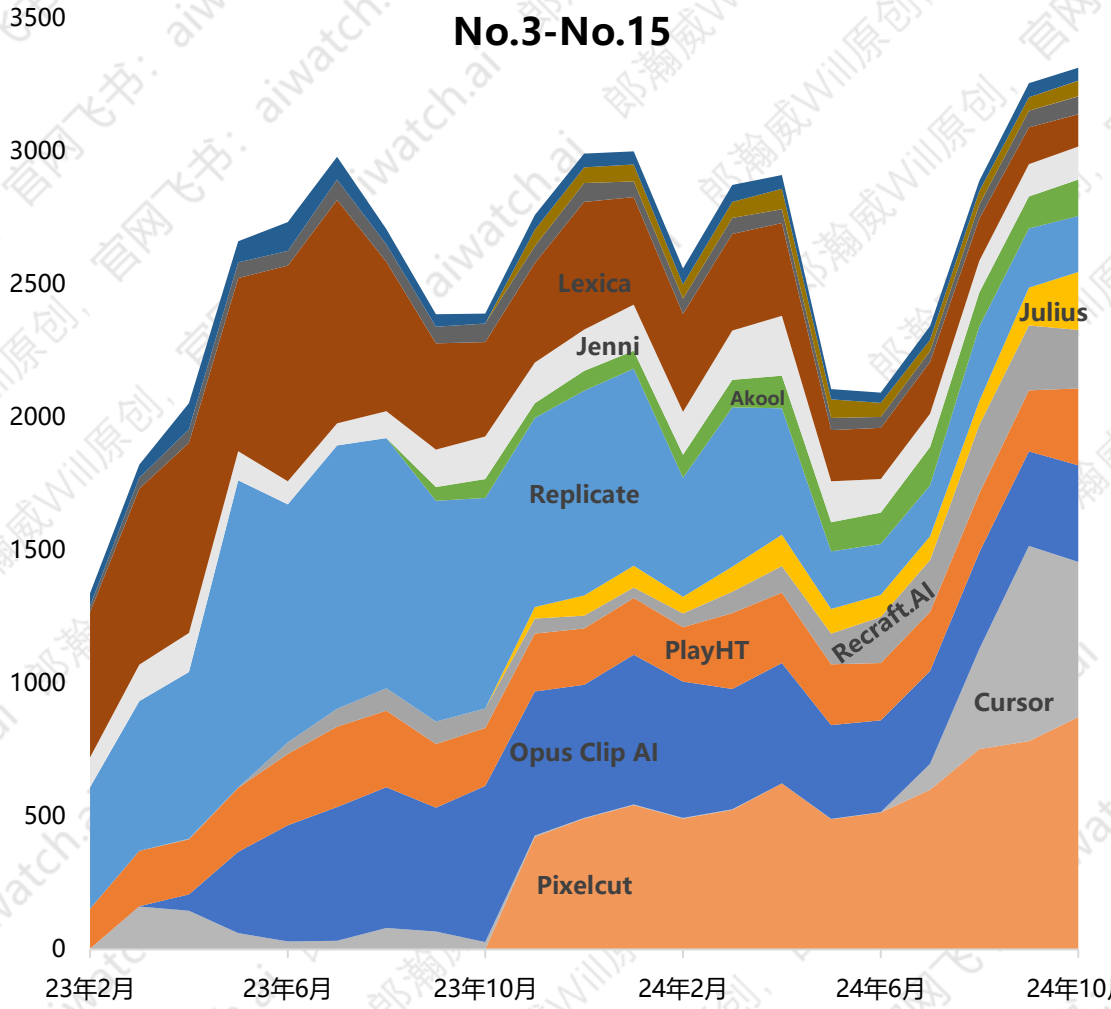
数据来源：similarweb 单位：万visit

AIGrant1&2 网页流量趋势 10月总量：1.3亿

- Perplexity AI表现最为突出，访问量从4747万增长至9078万，保持行业绝对领先地位，Pika凭借820%的增长率跃居第二，显示出强劲的发展势头和市场潜力



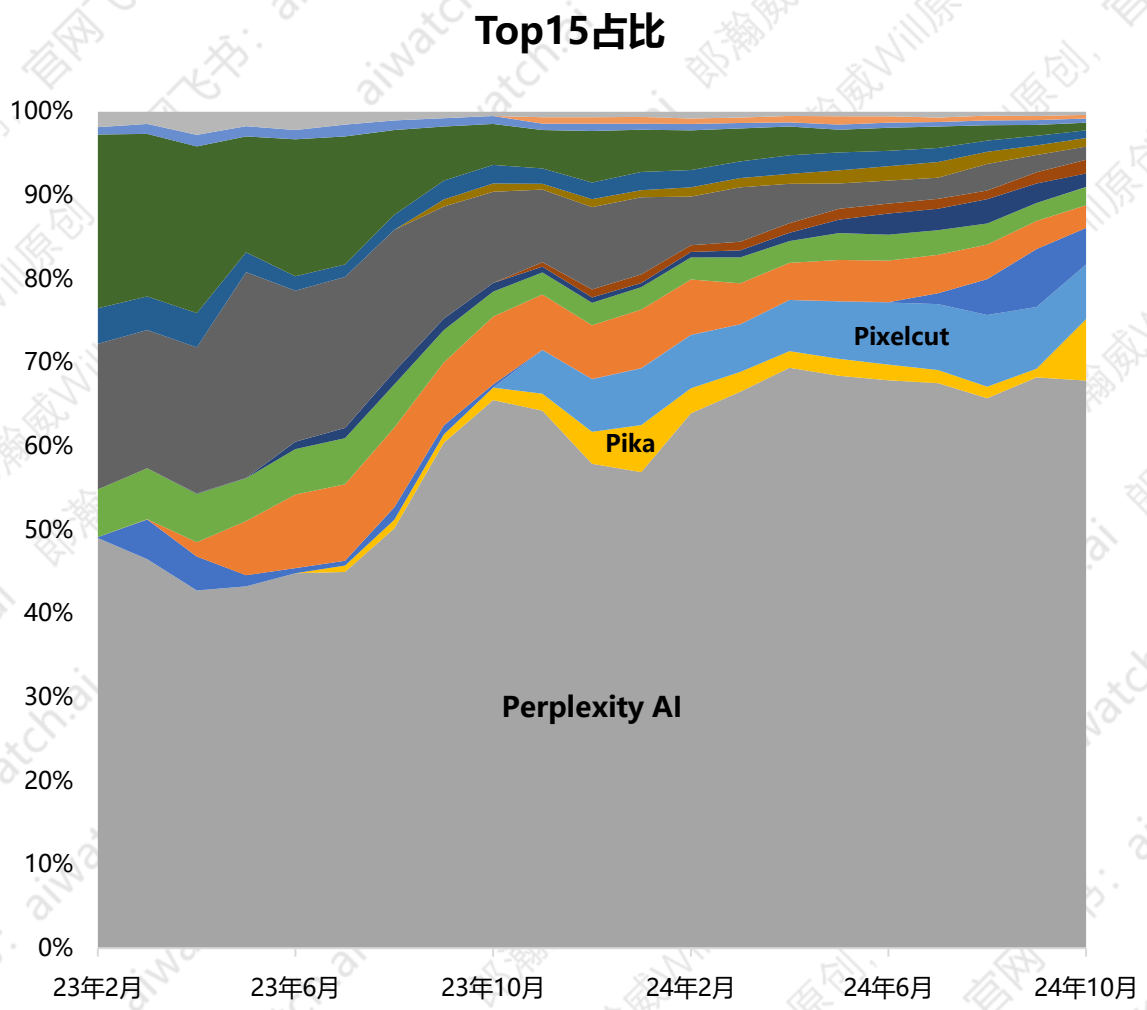
- 第4至第7名企业（Cursor、Opus Clip AI、PlayHT、Recraft.AI）访问量在200-600万之间，构成稳定的第二梯队，部分企业如Opus Clip AI(-38%)、Replicate(-73%)、Lexica(-66%)出现较大幅度下滑，反映市场竞争加剧



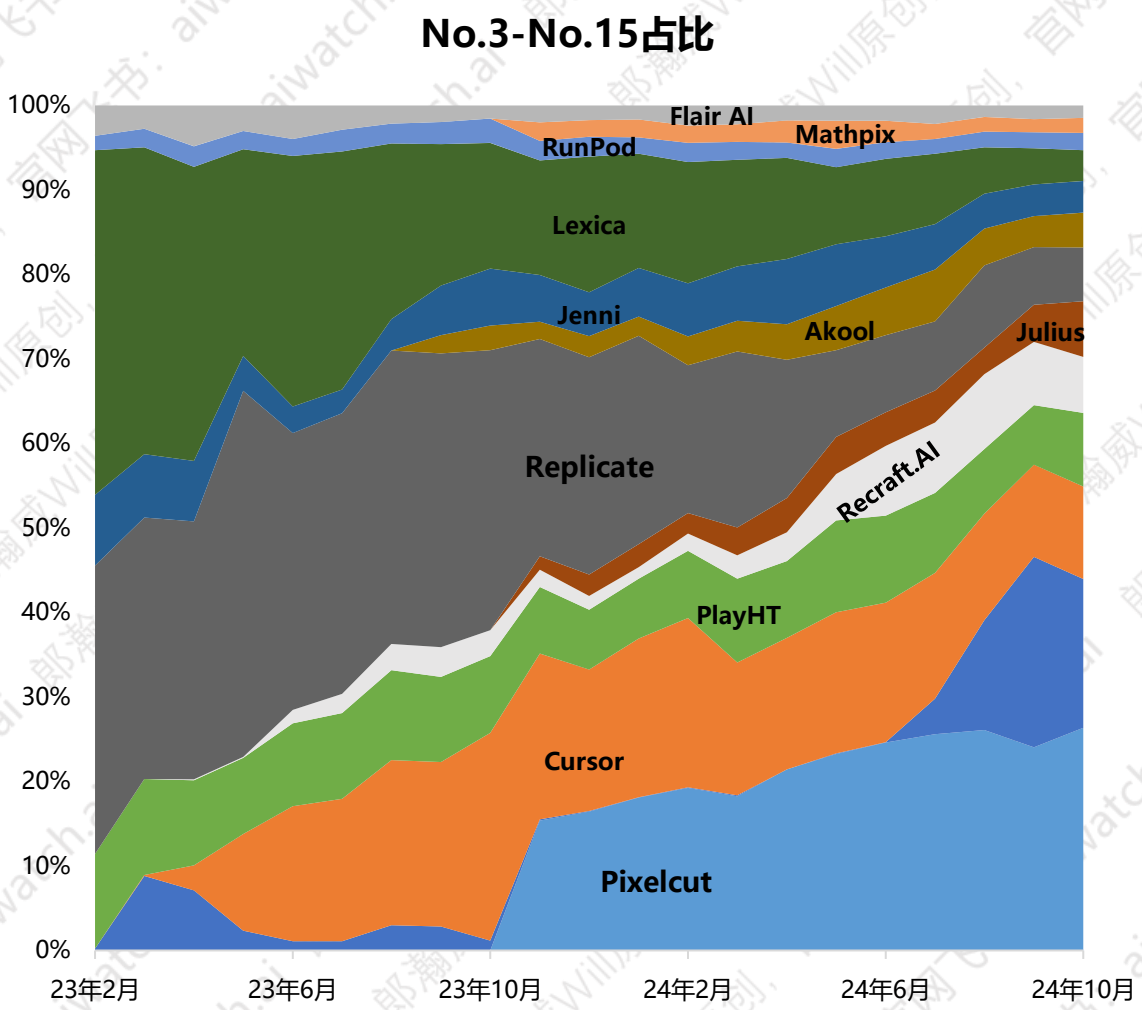
数据来源：similarweb 单位：万visit

AIGrant1&2 2023.2~2024.10 网页流量占比

- Top15占比图显示，Perplexity AI持续保持主导地位，但市场份额趋于分散，新兴企业如Pika、Pixelcut的快速崛起，推动市场格局向多元化发展



- No3-No15占比图反映，除头部企业外的市场份额分配趋于均衡，竞争更加充分，整体市场经历从集中到分散的演变过程，预示行业正在走向成熟



数据来源：similarweb 单位：万visit

AIGrant 3&4

AIGrant 3&4

AIGrant 3&4 - Takeaway

1. 2024年10月，Algrant3&4 Top15网站的总访问量达到696万次。
2. Consensus以305万次访问量稳居榜首，其次是Creatify AI和VAPI，分别为117万次和68万次。
3. 从增速来看，Consensus年增速高达144%，成为推动整体增长的核心动力。
4. Graylark (geospy.ai) 和 reworkd.ai 等新兴平台在专业工具领域表现不俗，为技术用户提供了精细化解决方案。
5. 从流量结构看，Consensus占据主要份额，但Creatify AI和VAPI等后起之秀的增长表明市场分布更加多样化。
6. Artificial Analysis 和 Omnivore 等垂直领域平台的发展显示了市场对深度服务需求的持续上升趋势，未来或有更多机会崭露头角。

数据来源：similarweb 单位：万visit

AIGrant3&4 - Top15

➢ **Top15 总网页流量：696万次visit**

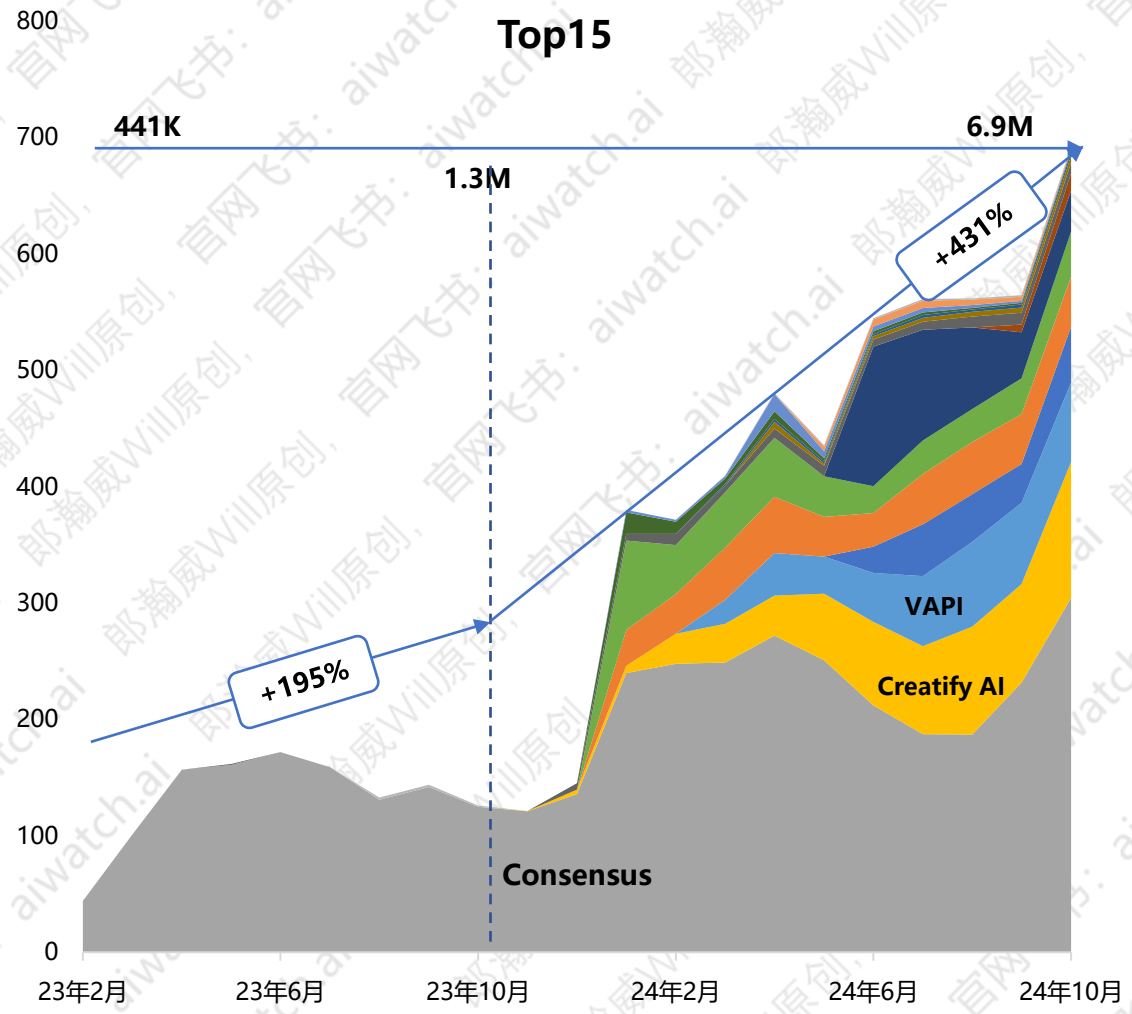
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	Consensus	125	305	144%
2	Creatify AI		117	-
3	VAPI		68	-
4	Artificial Analysis		48	-
5	Omnivore		43	-
6	reworkd.ai		39	-
7	Graylark (geospy.ai)		35	-
8	sync.so		15	-
9	VirtualStagingAI		9	-
10	browserbase		6	-
11	Juicebox		3	-
12	Pulse AI		2	-
13	haizelabs		2	-
14	didero.ai		2	-
15	Matic Robots		2	-

数据来源：similarweb 单位：万visit

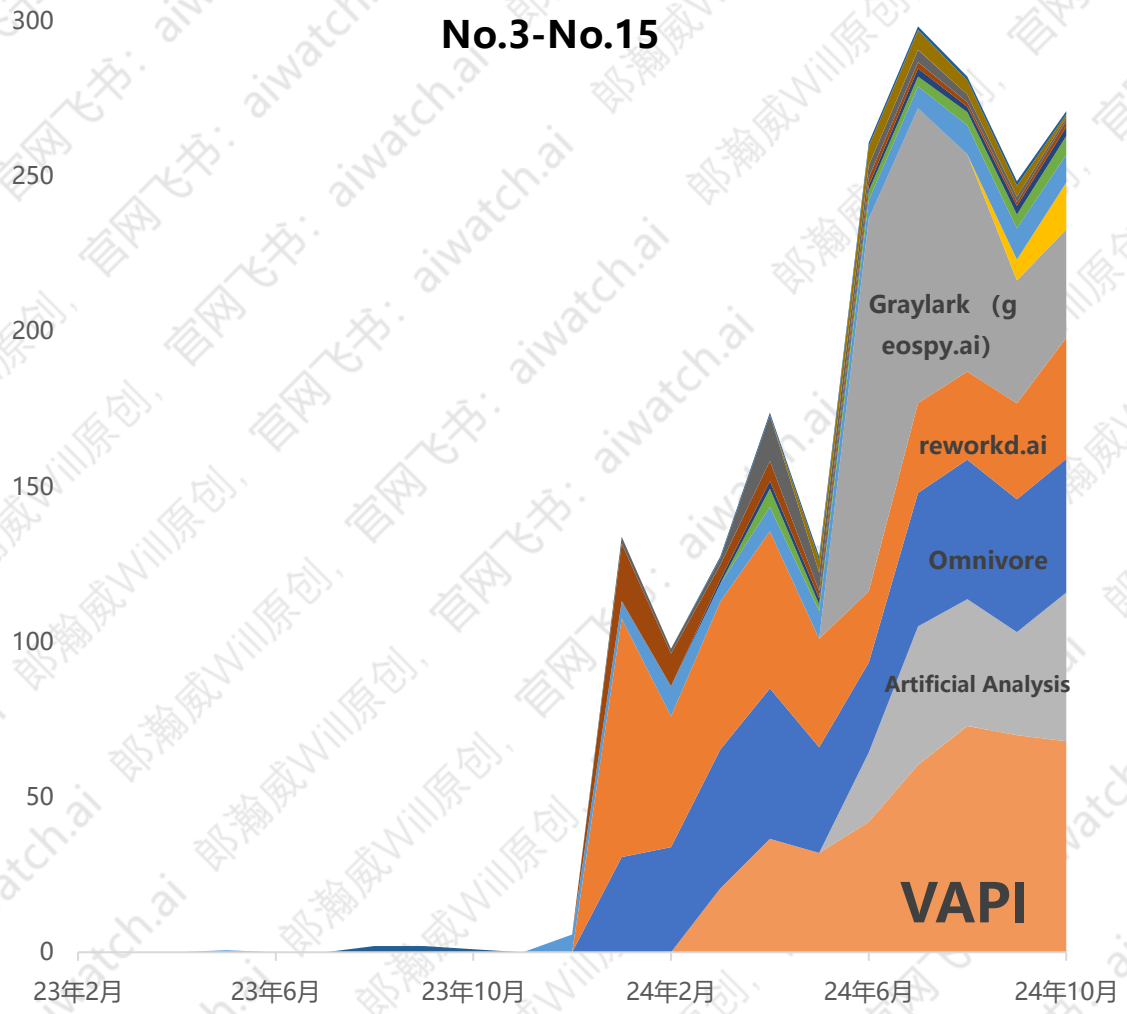
郎瀚威Will原创，官网飞书：aiwatch.ai

AIGrant3&4 网页流量趋势 10月总量：692万

- Consensus以144%的增长率和305万的访问量，展现出强劲的市场领导力，Creatify AI虽为新晋企业，但以117万的访问量快速确立了第二的市场地位



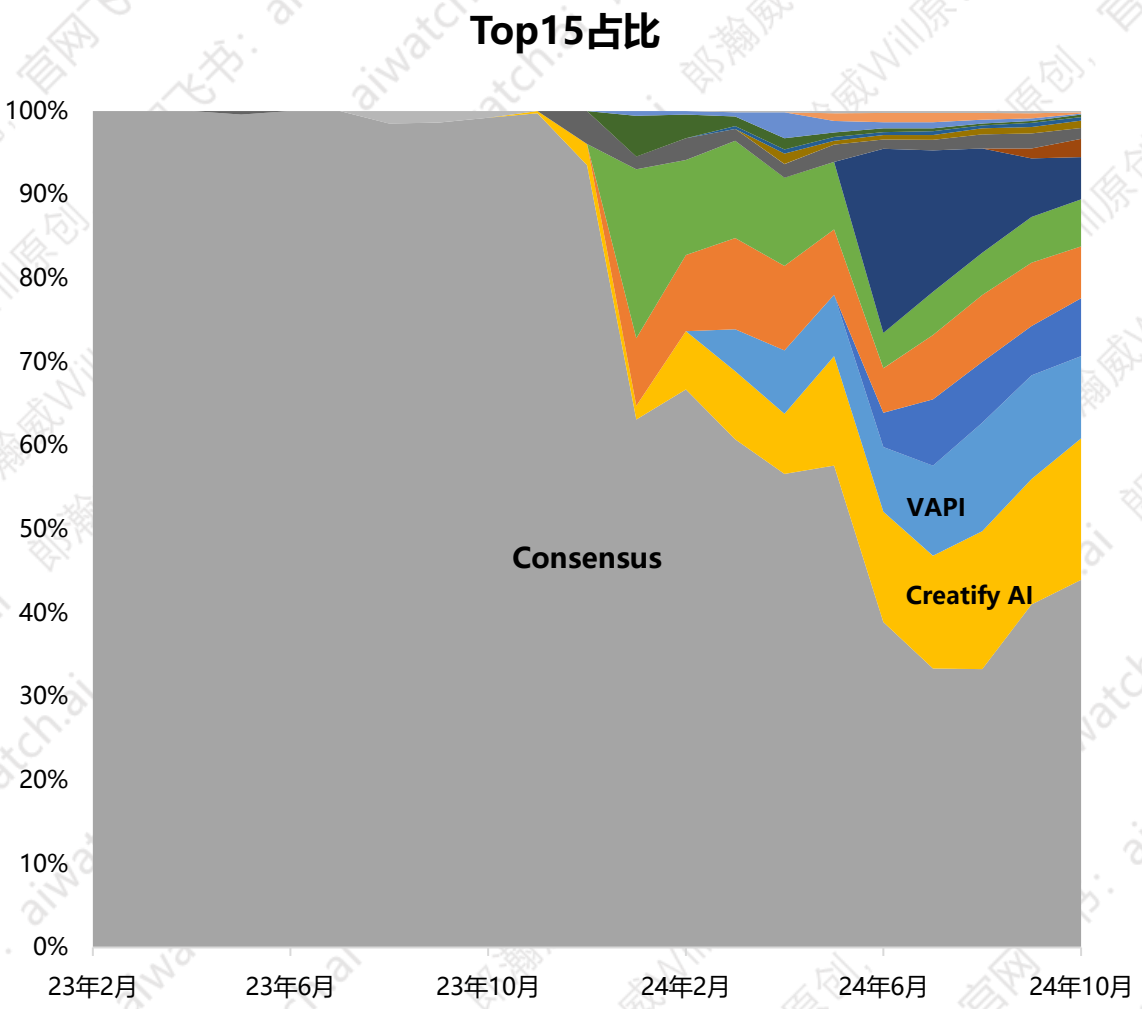
- VAPI、Artificial Analysis和Omnivore组成稳定的第二梯队，访问量在40-70万之间，第8名之后的企业访问量都在15万以下，与头部企业差距明显，市场分化严重



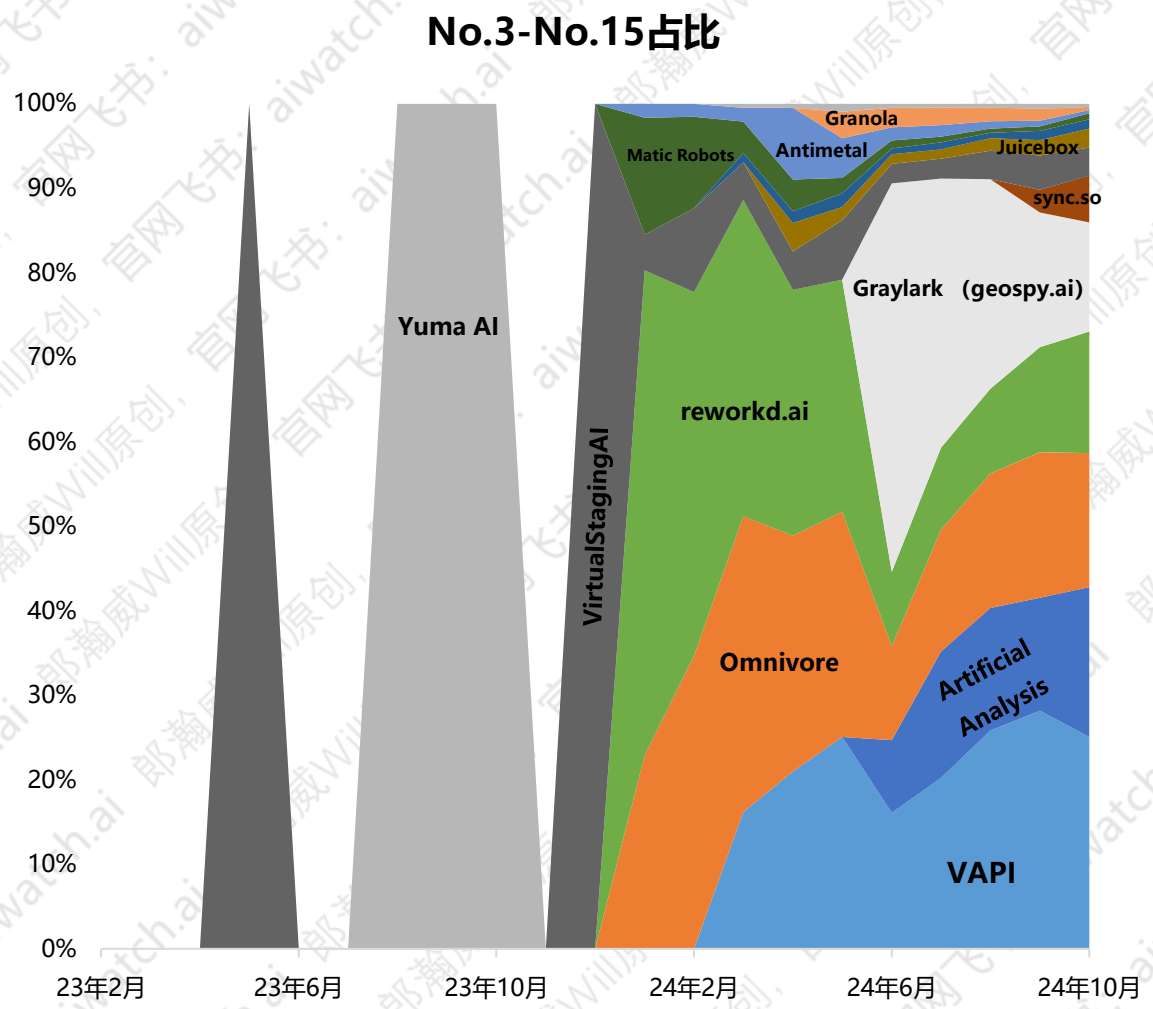
数据来源：similarweb 单位：万visit

AIGrant3&4 2023.2~2024.10 网页流量占比

- Top15占比图显示，Consensus的主导地位明显，但市场份额有所下降，Creatify AI和VAPI的崛起带动了市场结构的多元化发展



- No3-No15占比图显示，除头部企业外的市场份额分布更加均衡，整体市场从高度集中逐步走向多元化竞争，预示行业正在形成良性竞争格局



数据来源：similarweb 单位：万visit

ProductHunt

ProductHunt (截止2024.6)

ProductHunt - Top15

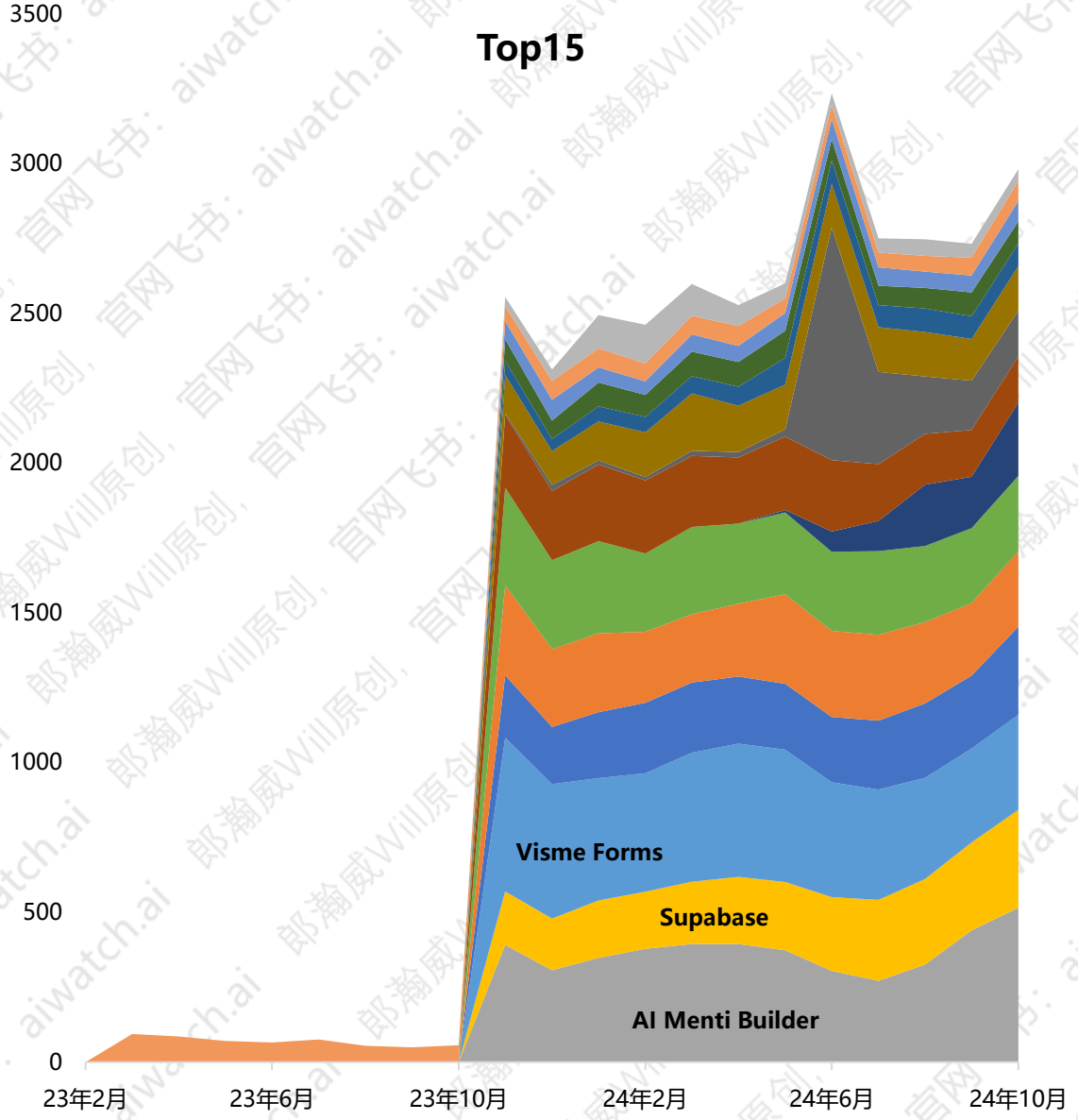
➢ **Top15 总网页流量：2982万次visit**

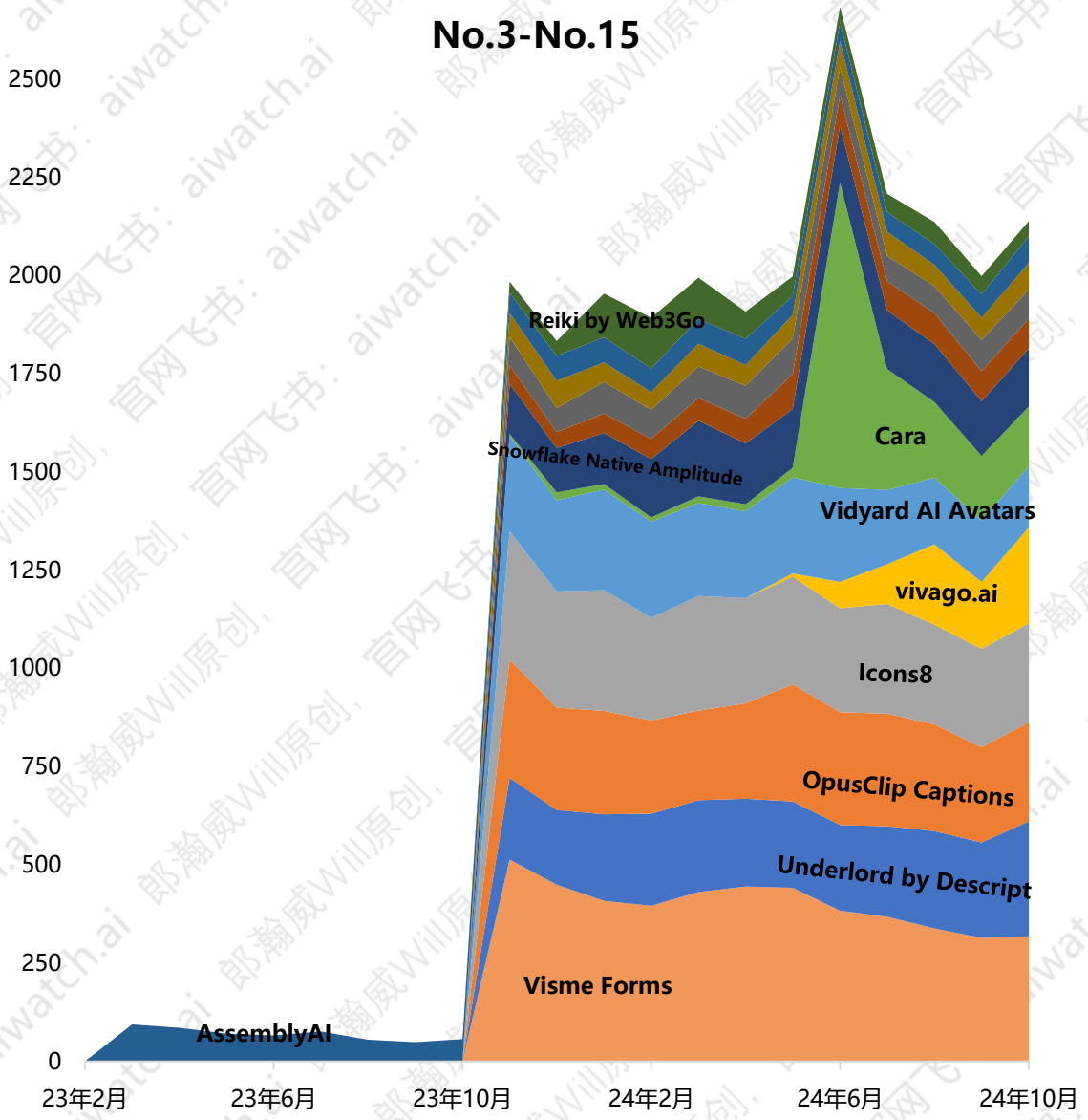
序号	产品名称	23年10月（万visit）	24年10月（万visit）	年度变化
1	AI Menti Builder		516	-
2	Supabase		327	-
3	Visme Forms		318	-
4	Underlord by Descript		293	-
5	OpusClip Captions		252	-
6	Icons8		252	-
7	vivago.ai		245	-
8	Vidyard AI Avatars		155	-
9	Cara		153	-
10	Snowflake Native Amplitude		148	-
11	Braintrust AIR		76	-
12	Wondershare EdrawMax		74	-
13	10015 Tools		68	-
14	AssemblyAI	57	67	18%
15	Reiki by Web3Go		39	-

数据来源：similarweb 单位：万visit

官网飞书：aiwatch.ai 郎瀚威Will原创

ProductHunt 2023.2~2024.10 网页流量趋势





数据来源：similarweb 单位：万visit

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数据来源：similarweb 单位：万visit

感谢名单

报告写了一个多月，咨询了很多位朋友，其中有看2C赛道的VC，和做项目的创业者，以下是朋友们的列表（按咨询时间排序），对他们表示衷心感谢！

- 孔某人
- Frank Chen 前腾讯游戏
- Sam H
- Ben From Vitalbridge
- Daisy Z
- Jason From Lightspeed China
- Christina T
- Emily From Yunqi
- 邵钰杉
- Gloria From DCM
- 王晓翔 From 幻方投资
- 罗泽铭 Noah
- 张宇杰 Kostja
- Shawn Zheng From Jin Qiu Capital
- Clara From FutureX
- 阿彪 From Hix.ai
- Vela
- Orangesai From 橘子汽水铺
- 大罗 From SEOdaluo
- Iris 生姜 魏伊培
- David from AI Native Foundation

数据来源：similarweb 单位：万visit