

OpenAI 直播跟踪（六）：ChatGPT 新增语音搜索服务，多项实时 API 最新发布

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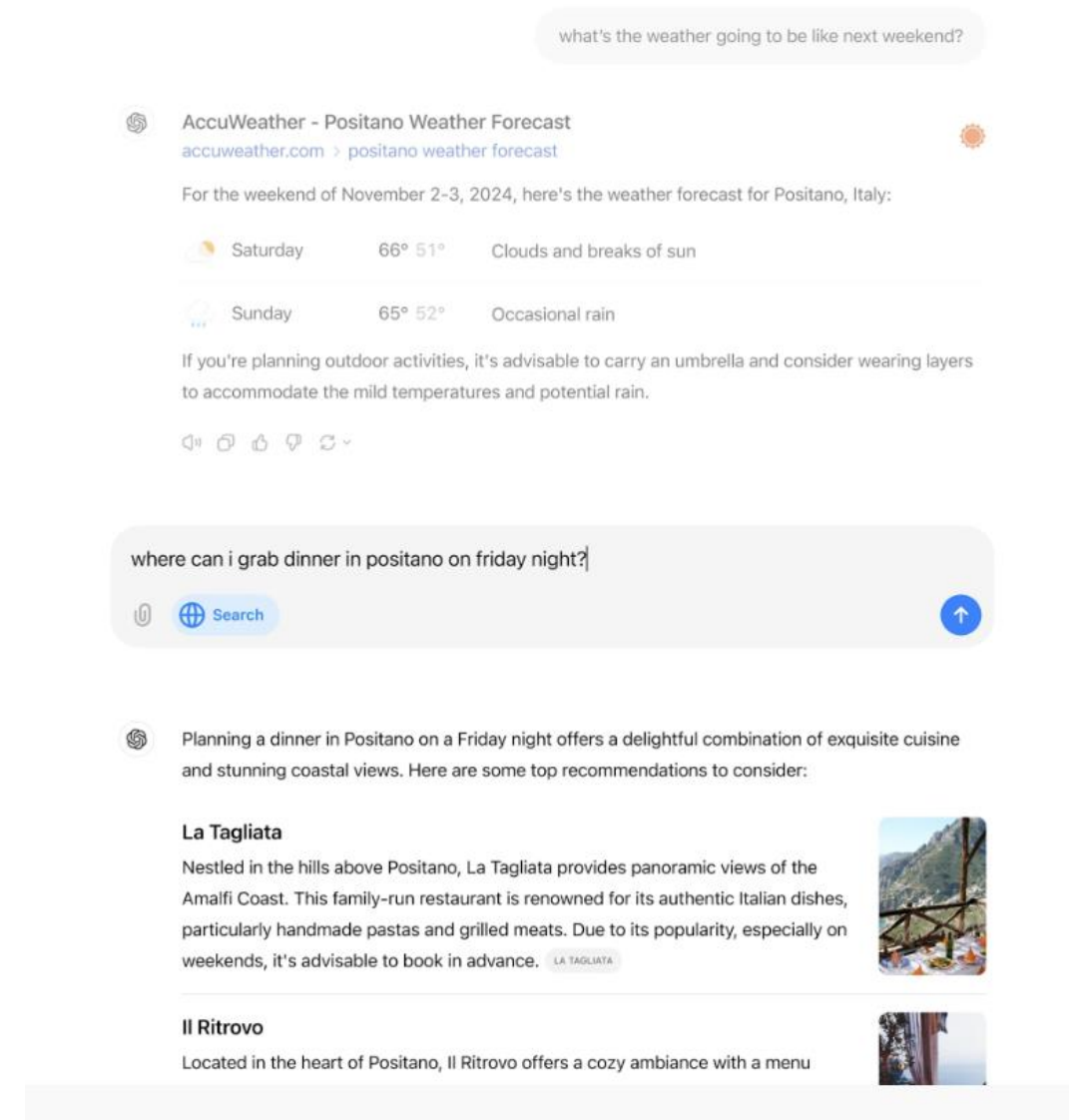
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投资要点：

- **ChatGPT 搜索功能全面开放，新增语音搜索服务。**12月16日（直播第八天），根据腾讯科技官微，OpenAI 宣布 ChatGPT 搜索功能将向全体用户开放，过去该功能仅向 ChatGPT Plus 和 Team 这类付费用户开放。此外，OpenAI 正在将 ChatGPT 搜索功能与高级语音模式相结合。ChatGPT 现在能够以语音形式搜索网络，并以自然、流畅的对话方式回应用户的问题。例如，如果用户即将前往另一个城市度假，只需询问 ChatGPT 当地的天气情况，内置的搜索功能便能提供最新的天气信息。为了增强这一功能，OpenAI 已经与多家顶级新闻和数据提供商建立了合作关系。因此，用户还将能够直接在 ChatGPT 中查看股票行情、体育赛事得分、天气预报等信息。
- **ChatGPT 搜索关键特性包括以下几点：**1. 对话式人工智能。ChatGPT 搜索使用户能够以自然语言提问。2. 跟进问题。允许用户提出跟进问题，使体验更加互动，类似于人与人之间的对话。3. 最新信息回应。ChatGPT 搜索实时捕捉网络资料，提供最新信息。4. 实时数据。让用户能够实时获取体育比分、天气状况、股票报价和突发新闻，以及定位服务和地图。5. 信息摘要。与传统搜索引擎显示一系列带有更多信息的网页链接不同，ChatGPT 搜索提供信息的简洁摘要。6. 来源归属。包含清晰的归属和源链接，使用户能够验证并进一步探索原始网站。7. 视觉结果。ChatGPT 搜索使用视频和图片来回答某些用户查询。
- **OpenAI 宣布 o1 接入 API，并发布实时 API 重大更新。**12月17日（直播第九天），根据腾讯科技官微，OpenAI 宣布将通过其应用程序编程接口（API）向第三方开发者开放其尖端大模型 o1 系列。新推出的 o1 模型内部编号为 o1-2024-12-17，特别设计用于处理复杂的多步骤推理任务。与早期的 o1 预览版本相比，这一版本在准确性、效率和灵活性方面均实现了显著提升。OpenAI 还宣布了其实时 API 的重大更新，旨在支持低延迟、自然的会话体验，如语音助手、实时翻译工具或虚拟导师等应用场景。
- **GPT-4o 音频定价下降 60%，GPT-4o mini 发布。**在定价方面，OpenAI 也推出了新的策略，使得 GPT-4o 音频的成本降低了 60%，每 100 万输入 Tokens 的费用为 40 美元，每 100 万输出 Tokens 的费用为 80 美元。同时，缓存音频输入的成本也降低了 87.5%，现在的定价为每 100 万输入 Tokens 2.5 美元。为了进一步提高性价比，OpenAI 还推出了 GPT-4o mini，这是一种更小、更具成本效益的模型。其价格更为亲民，每 100 万输入 Tokens 的费用为 10 美元，每 100 万输出 Tokens 的费用为 20 美元。
- **偏好微调技术发布，一种创新的模型定制方法。**OpenAI 还发布了偏好微调，这是一种创新的模型定制方法，能够根据用户和开发者的偏好来优化模型表现。与传统的依赖于精确输入输出的监督式微调不同，偏好微调采用成对比较的方式来指导模型选择更优的响应。这种方法在处理主观性较强的任务时尤为有效，例如总结、创造性写作或是语气和风格更重要的应用场景。
- 我们认为，OpenAI 第八天的直播是对现有功能的提升，使得 ChatGPT 搜索功能变得更加贴近实际，而第九天的直播则更多的是面向开发者，使其能在成本更低的情况下更加方便的使用 OpenAI 的各类模型。可以看出，OpenAI 目前相比于基础技术，更加注重功能的实用性和落地的便捷性，未来 AI 应用的落地相比于 AI 大模型技术的迭代有望成为 AI 行业发展的主流。
- **建议关注：**金山办公、新致软件、汉得信息、合合信息、万兴科技、虹软科技、新国都、当虹科技、同花顺、福昕软件、泛微网络、致远互联、三六零、商汤-W、科大讯飞、迈富时、鼎捷数智、赛意信息、中国软件国际、海康威视、大华股份、润泽科技、浪潮信息。
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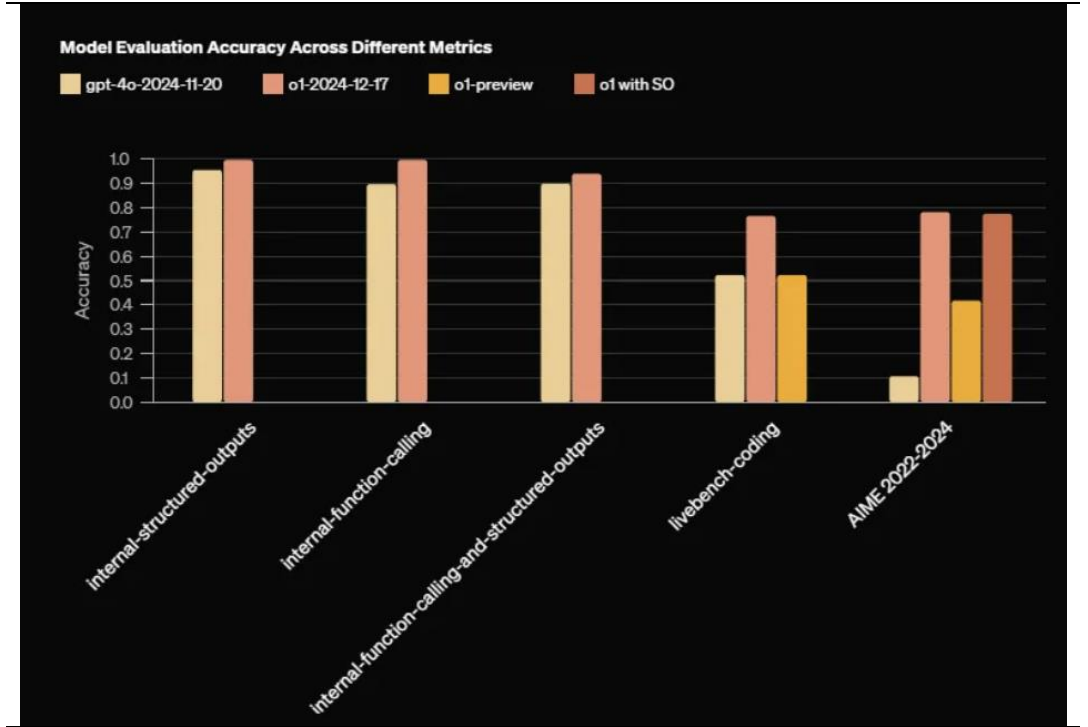
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图 1 ChatGPT 搜索功能示例



资料来源：OpenAI 官网，HTI

图 2 o1-2024-12-17 性能突出



资料来源：腾讯科技官微，HTI

APPENDIX 1

Summary

Investment Highlights:

ChatGPT search is now fully open, with added voice search. On December 16, OpenAI announced that ChatGPT's search feature is available to all users, previously limited to paid users. It combines search with advanced voice mode, allowing voice-based web searches and natural responses. Users can inquire about local weather, and the built-in search provides updates. OpenAI has partnered with top news and data providers for real-time stock quotes, sports scores, and weather forecasts.

Key features include: 1. Conversational AI for natural language queries. 2. Follow-up questions for interactive experience. 3. Real-time information capture. 4. Access to real-time sports scores, weather, stock quotes, and news. 5. Information summaries instead of traditional search links. 6. Source attribution for verification. 7. Visual results using videos and images.

OpenAI announced o1 API access and major real-time API updates. On December 17, OpenAI opened its o1 model series to third-party developers via API. The o1-2024-12-17 model is designed for complex reasoning tasks, with improved accuracy and efficiency. Real-time API updates support low-latency applications like voice assistants and translation tools.

GPT-4o audio pricing reduced by 60%, GPT-4o mini released. OpenAI reduced GPT-4o audio costs by 60%, with input tokens at \$40 per million and output tokens at \$80 per million. Cached audio input costs dropped by 87.5% to \$2.5 per million tokens. GPT-4o mini offers a cost-effective model at \$10 per million input tokens and \$20 per million output tokens.

Preference fine-tuning released, an innovative model customization method. This method optimizes model performance based on user preferences, using pairwise comparisons for better responses, effective for subjective tasks like summarization and creative writing.

We believe OpenAI's eighth-day live stream enhanced existing features, making ChatGPT search more practical, while the ninth-day stream focused on developers, offering cost-effective model usage. OpenAI emphasizes practical functionality over foundational technology, suggesting AI application deployment will lead industry growth.

Suggested focus: Beijing Kingsoft Office Software, Shanghai Newtouch Software, Hand Enterprise, Seeyon Internet Software, Wondershare Technology, ArcSoft Corporation, Xgd Inc, Hangzhou Arcvideo Technology, Hithink RoyalFlush Information Network, Fujian Foxit Software Development, Weaver Network Technology, 360 Security Technology Inc., Sense Time Group, Iflytek, Mysoft International, Guangzhou Sie Consulting, Chinasoft International, Hangzhou Hikvision Digital Technology, Zhejiang Dahua Technology, Range Intelligent Computing Technology Group Company Limited, Inspur Electronic Information Industry.

Risk Warning: AI technology and application deployment may be weaker than expected.

附录 APPENDIX

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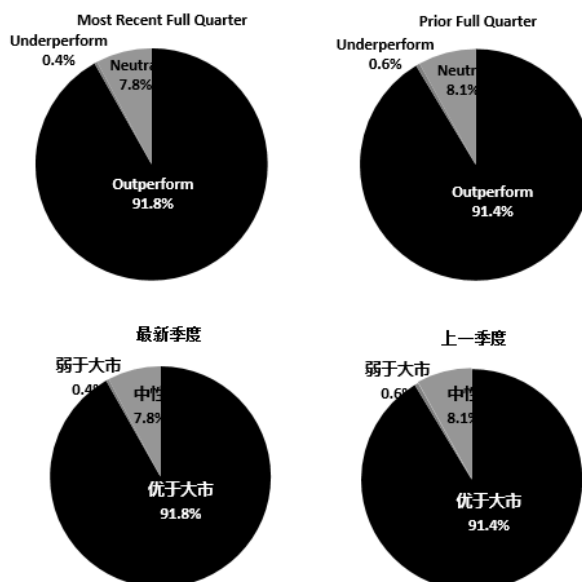
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Ratings Distribution



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*在每个评级类别里投资银行客户所占的百分比。

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各地股票基准指数：日本 – TOPIX, 韩国 – KOSPI, 台湾 – TAIEX, 印度 – Nifty100; 其他所有中国概念股 – MSCI China.

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*Percentage of investment banking clients in each rating category.

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