

State of Search Q1 2026

Behaviors, Trends, and Clicks
Across the US & Europe





Introduction

With rapid AI breakthroughs and constant speculation about the future of search, the demand for reliable, real-world data has never been greater.

This report draws on large-scale clickstream data from the US, EU, and UK in Q1 2026 to provide a grounded view of how people search, browse, and engage online. Alongside core metrics, it includes deeper analysis of Google AI Mode and shifts in query length, offering additional context on how users are interacting with both traditional and AI-assisted search.

Together, these insights highlight where meaningful change is occurring, and where behavior remains more consistent than expected.

At Datas, we process billions of anonymized desktop digital events daily across regions, platforms, and devices. This report is built on that data. Our mission is to equip businesses with real-world, privacy-secured insights into how people search, browse, and engage online, so they can make smarter, faster decisions across content strategy, SEO, product planning, and beyond.

Our State of Search report is published quarterly; [subscribe](#) to our updates to get early access to it, and our other reports.

Executive summary

This report draws on user behavior clickstream data collected from Datas' large-scale panel of tens of millions of active desktop users globally. For the purpose of this study, we have analyzed behavior in the USA and Europe (EU and UK) from March 2025 to March 2026.

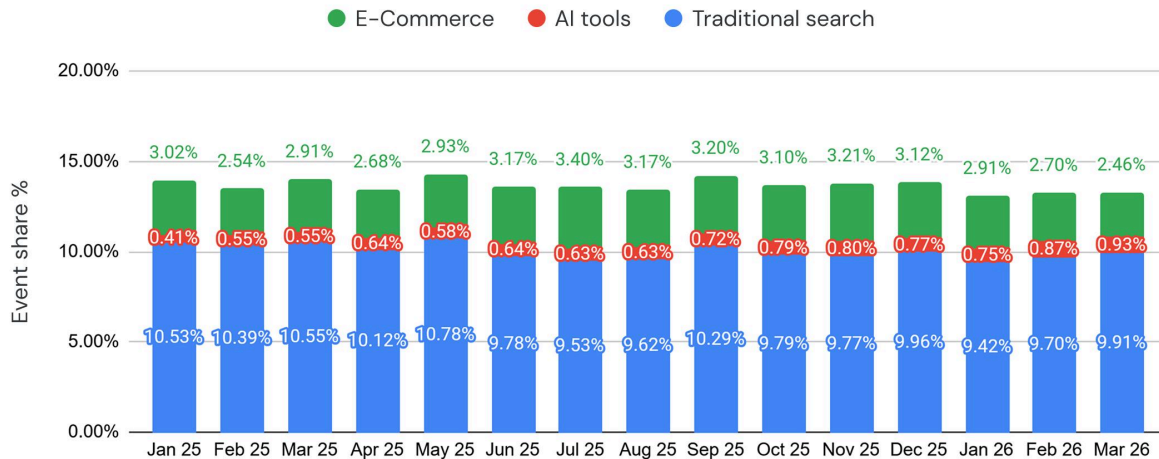
It includes:

- Key insights into platform share, search behavior, e-commerce activity, and content engagement across the US and Europe
- Emerging trends including zero-click, shifts in search intent, and regional contrasts in platform usage



Traditional search, AI, and e-commerce

Search, AI, and E-Commerce platform visits in the US



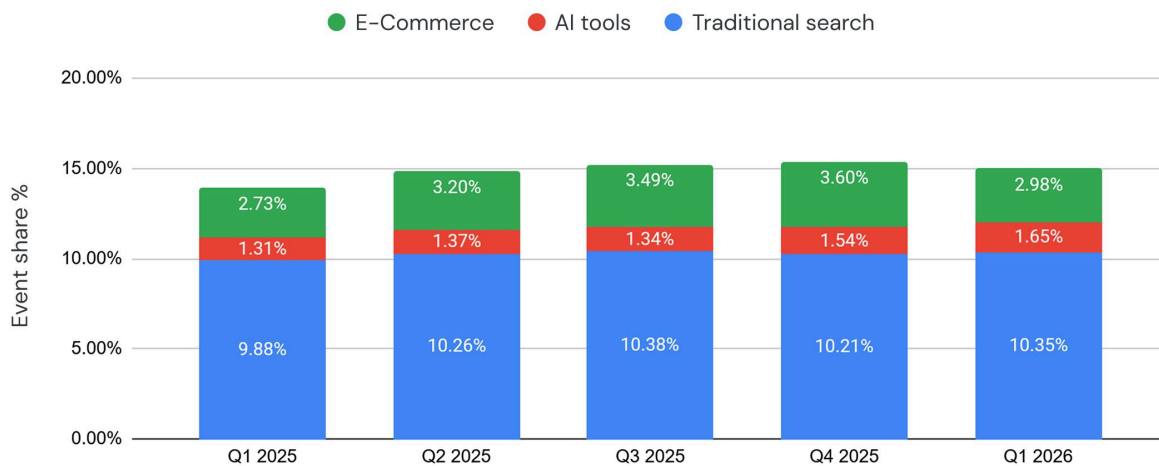
Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%

SparkToro

Source: Datas

Datos
A Semrush Company

Search, AI, and E-Commerce platform visits in the US



Quarterly Events Share (%) = Quarterly visits to domain's webpages / Total quarterly webpage visits across entire panel * 100%

SparkToro

Source: Datas

Datos
A Semrush Company

Note on quarterly values:

Quarterly metrics are calculated by aggregating all events across the quarter rather than averaging monthly values, which can result in small differences between quarterly figures and monthly averages. Share metrics are calculated as a median across multiple datasets. This approach helps provide the most objective view possible of underlying search behavior.

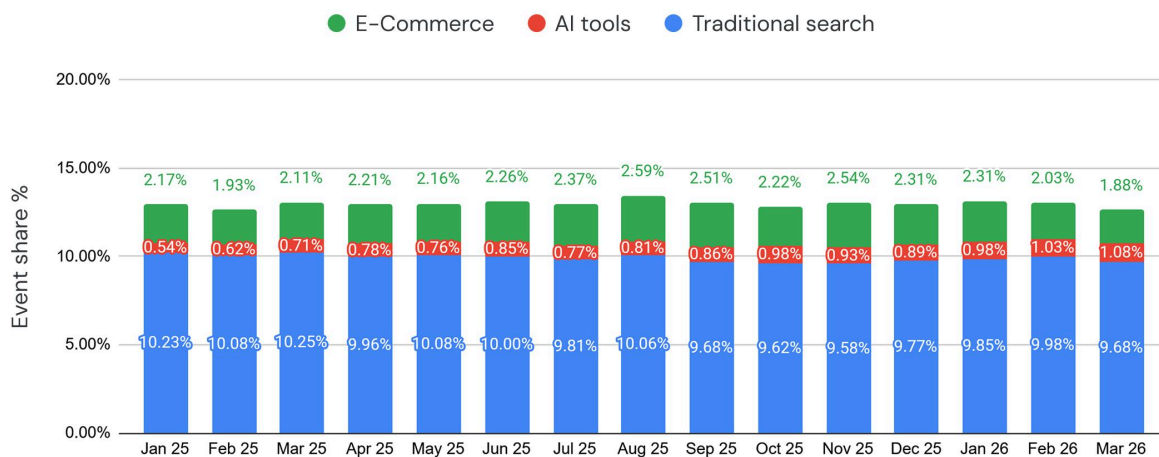


In the US, traditional search remained the largest driver of desktop search activity. However, its trajectory was broadly flat to slightly declining. Movement across quarters was minimal, with values staying within a narrow range from Q1 2025 through Q1 2026.

AI tools continued their upward trajectory, showing both consistent and accelerating growth over time. Their share of desktop events increased from approximately 0.41% in January 2025 to 0.93% by March 2026. Notably, the pace of growth strengthened following Q4 2025, suggesting that adoption is persisting beyond seasonal effects. Their share of desktop events increased from 1.31% in Q1 2025 to 1.65% by Q1 2026.

E-commerce activity followed a more seasonal pattern with event share rising from 2.73% in Q1 2025 to a peak of 3.60% in Q4, before declining to 2.98% in Q1 2026. This drop suggests that the Q4 increase was driven largely by seasonal demand.

Search, AI, and E-Commerce platform visits in the EU & UK



Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%

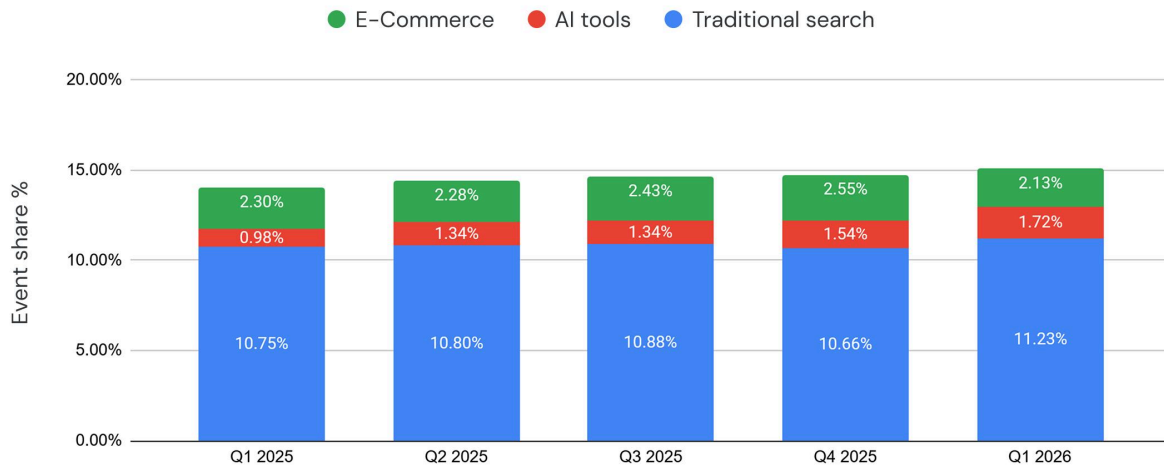


Source: Datos





Search, AI, and E-Commerce platform visits in the EU & UK



Quarterly Events Share (%) = Quarterly visits to domain's webpages / Total quarterly webpage visits across entire panel * 100%



Source: Datos



In the EU and UK, traditional search remained broadly stable throughout the period, with slight downward pressure visible in the monthly data, followed by a modest rebound at the quarterly level in Q1 2026, rising to just above 11%.

AI tools showed the strongest and most consistent growth across both views. Monthly data indicates a near doubling in share from 0.54% in Jan 2025 to 1.08% by March 2026, while quarterly figures confirm continued acceleration, reaching a new high in Q1 2026. This sustained upward trend points to ongoing adoption rather than plateauing.

E-commerce activity followed a more cyclical pattern. After peaking mid-year and again in Q4 2025, both monthly and quarterly data show a clear decline into early 2026, pointing to a seasonal uplift followed by a return to lower baseline levels.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

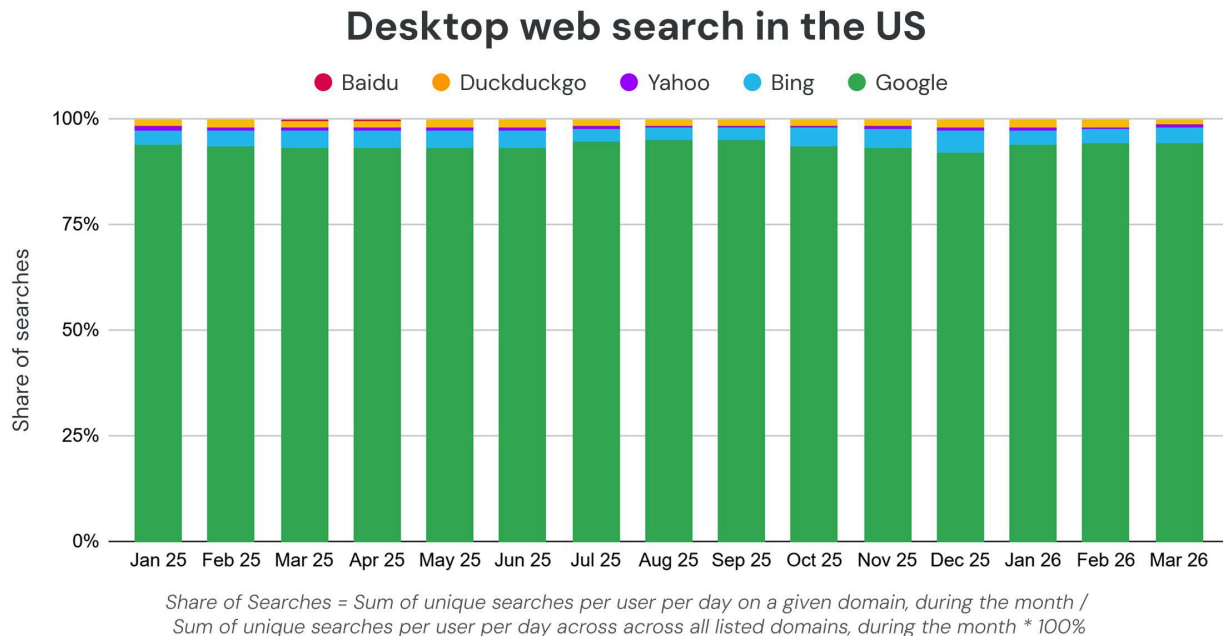


After some stagnation in both the US and EU/UK in 2025, it's interesting to see AI tools continue to grow their share for the last two quarters in both regions. This suggests we haven't yet reached the peak of AI usage. What's shocking is that we're still at <2% of visits going to AI tools, despite the relentless hype, media attention, and cultural discussion. AI has a long way to go before usage catches up to expectations.



State of traditional search

A review of the performance of the five largest "traditional" (non-AI) search engines, tracking their progress from Q1 2025 through Q1 2026.



SparkToro

Source: Datos

Datos
A Semrush Company

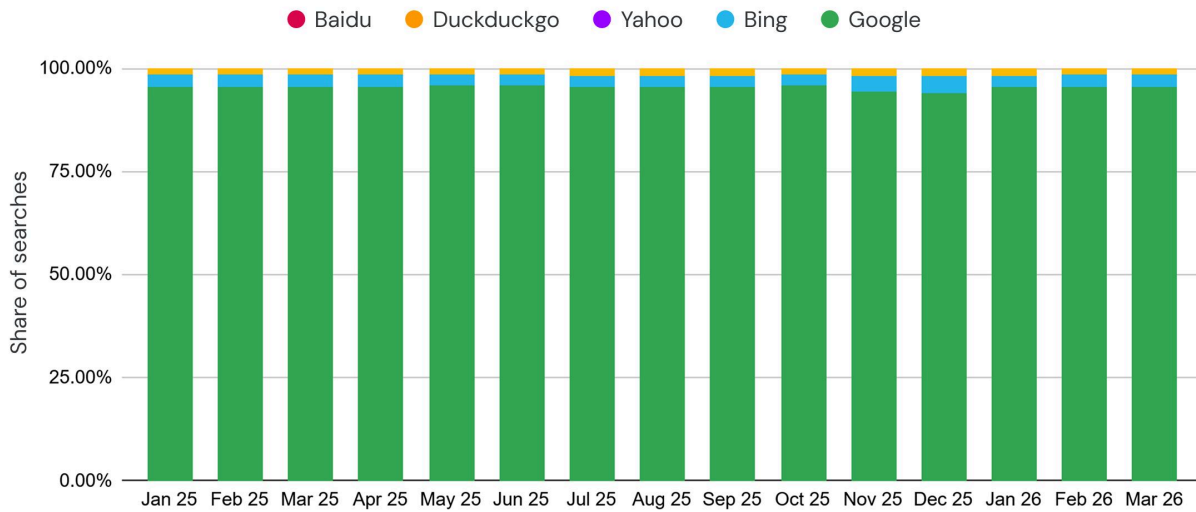
In the US, Google maintained a dominant share of desktop search, with some variability. Its share declined to a low of 92.1% in December 2025 before recovering to 94.3% by March 2026.

Bing exhibited more pronounced fluctuation, peaking at 5.33% in December 2025 before falling back to 3.2–3.8% in early 2026. This pattern points to a short-term Q4 spike rather than continued growth.

Alternative engines remained marginal. DuckDuckGo peaked at 1.93% in January 2026 before dropping to 1.21% by March, while Yahoo continued declining.



Desktop web search in the EU & UK



Share of Searches = Sum of unique searches per user per day on a given domain, during the month /
Sum of unique searches per user per day across across all listed domains, during the month * 100%

SparkToro

Source: Datos

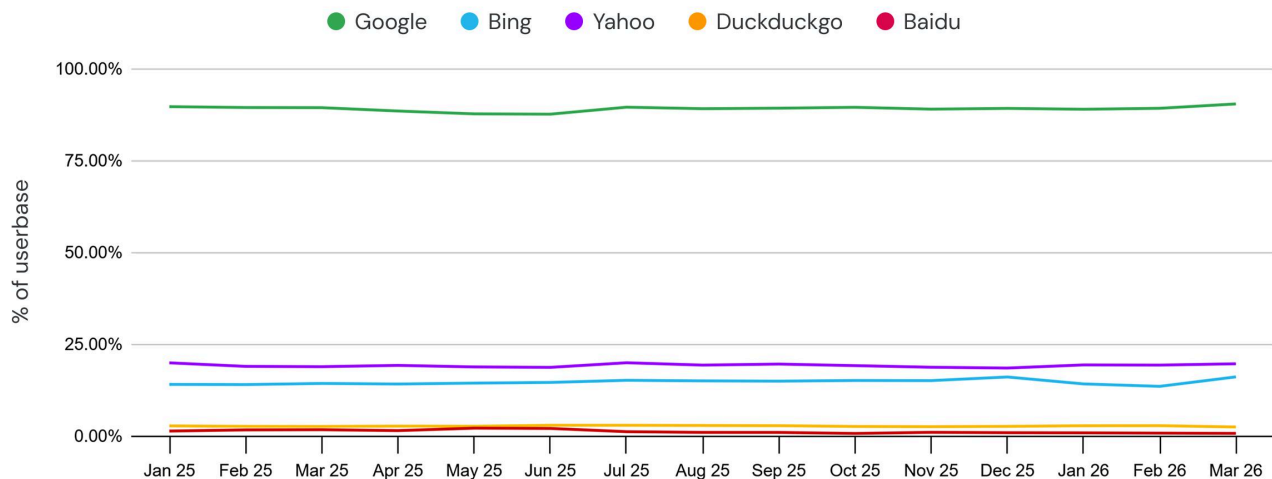
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In the EU and UK, Google retained a dominant share of desktop search, though with a noticeable dip in Q4 2025. Its share declined from 96.0% in October to 93.9% in December, before recovering to 95.5% in early 2026.

Bing followed a similar pattern, with gains concentrated in Q4. Its share rose to a peak of 4.12% in December 2025 before falling back to 2.5–3.0% in early 2026.

Other search engines remained marginal. DuckDuckGo peaked at 1.83% in December before declining, while Yahoo and Baidu maintained consistently minimal shares, with only limited month-to-month variation.

Share of desktop web search users in the US



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once /
Total number of unique panel users (monthly) * 100%

SparkToro

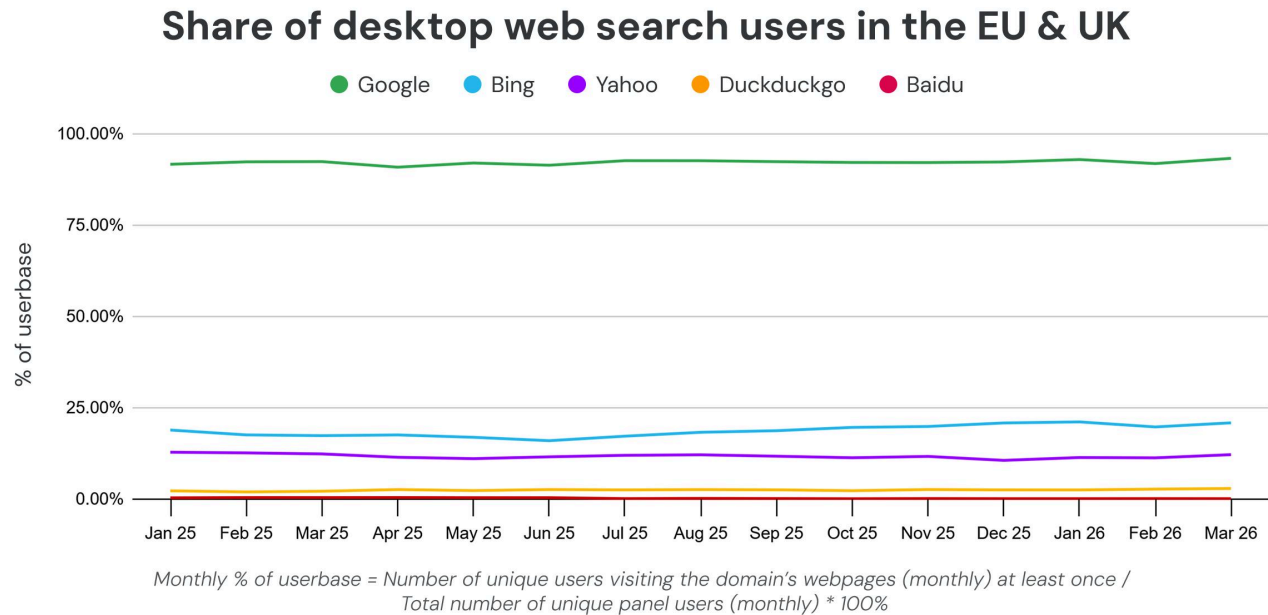
Source: Datos

Datos
A Semrush Company



In the US, Google's share of desktop search users remained stable in Q1 2026 at around 89%, indicating continued dominance with limited user churn.

Bing rebounded after a February dip, rising from 13.8% to 16.5% in March, returning to levels seen in late 2025. Yahoo held steady at 19–20%, while DuckDuckGo remained stable at around 3%. Baidu continued to decline, staying below 1.1% and down from over 2% in mid-2025.



Source: Datos



In the EU and UK, Google remained stable in Q1 2026, holding between 91.8% and 92.7%, in line with 2025 levels.

Bing sustained its elevated position, ranging from 19.6% to 20.2%, close to its late-2025 peak. Yahoo recovered from its Q4 dip, rising from 10.7% in December to 12.2% in March. Smaller engines remain niche with no growth signals. DuckDuckGo held steady at 2.6–2.7%, while Baidu remained below 0.3% with no signs of growth.

Rand's Take

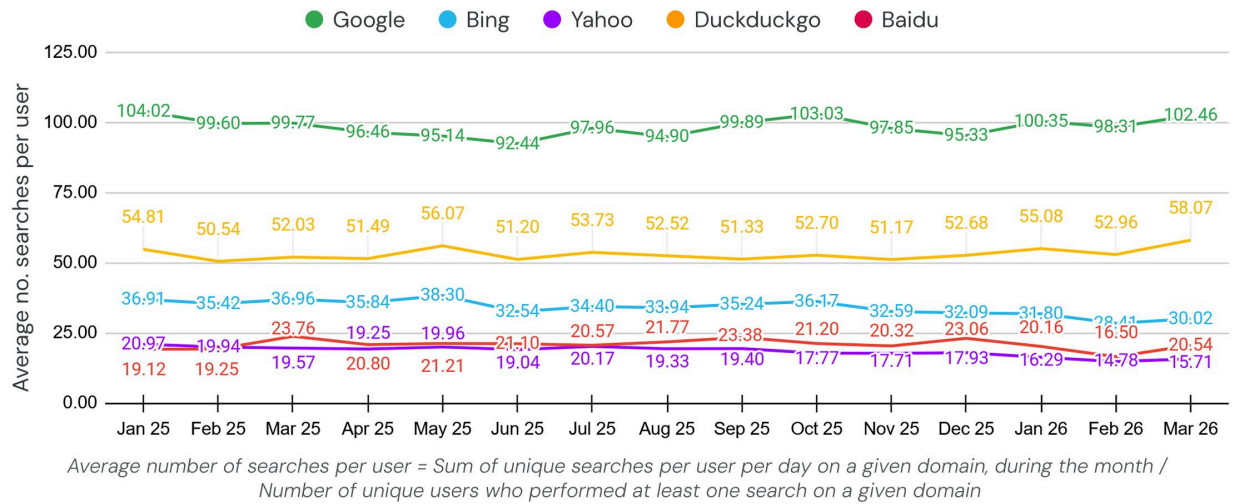
Rand Fishkin
SparkToro Co-founder & CEO



Once again, we're seeing all-time highs in Google usage despite the naysayers in your LinkedIn and Twitter feeds. I'm deeply grateful to clickstream panel data for being so reliable in a time when narratives get disconnected from reality.



Searches per US desktop searcher



SparkToro

Source: Datos

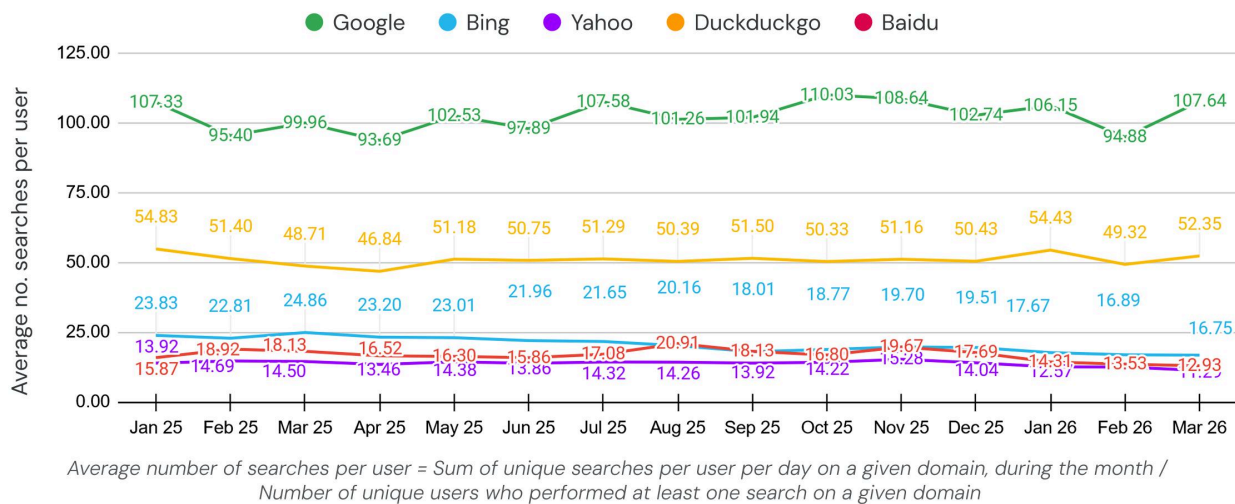
Datos
A Semrush Company

In the US, Google engagement rebounded in Q1 2026, rising from 95.3 searches per user in December to 102.5 in March.

DuckDuckGo showed the strongest growth, increasing from 52.7 in October to 58.1 in March, the highest level in the period. In contrast, Bing declined from 36.2 to 30.0 over the same timeframe.

Yahoo continued a downward trend, falling from above 20 searches per user in mid-2025 to 15.7 in March, marking its lowest level in the period.

Searches per EU & UK desktop searcher



SparkToro

Source: Datos

Datos
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In the EU and UK, Google engagement recovered in Q1 2026 after a February dip, returning to the 100–110 range seen throughout 2025.

Bing continued to decline, falling from 19.5 searches per user in December to 16.7 in March, marking the lowest level in the period. DuckDuckGo remained stable, with a slight rebound within its typical 50–54 range.

Yahoo and Baidu both trended downward in Q1 2026, ending near their lowest levels in the period.

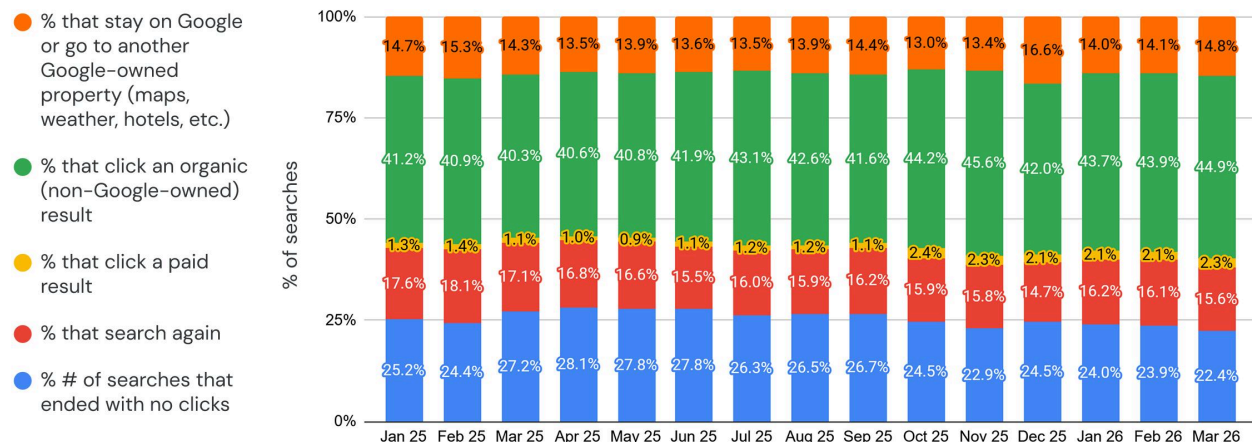
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



The searchers per searcher numbers are, IMO, the canary in the coalmine. If people who use Google start using it less because AI or social media is taking attention/value away from the search engine, then we're in a period of true disruption. As you can see from the numbers, seasonality, not behavior change, is driving the slight fluctuations, and people continue to search Google ~100X each month.

Distribution of Google US desktop search clicks over time



Source: Datos



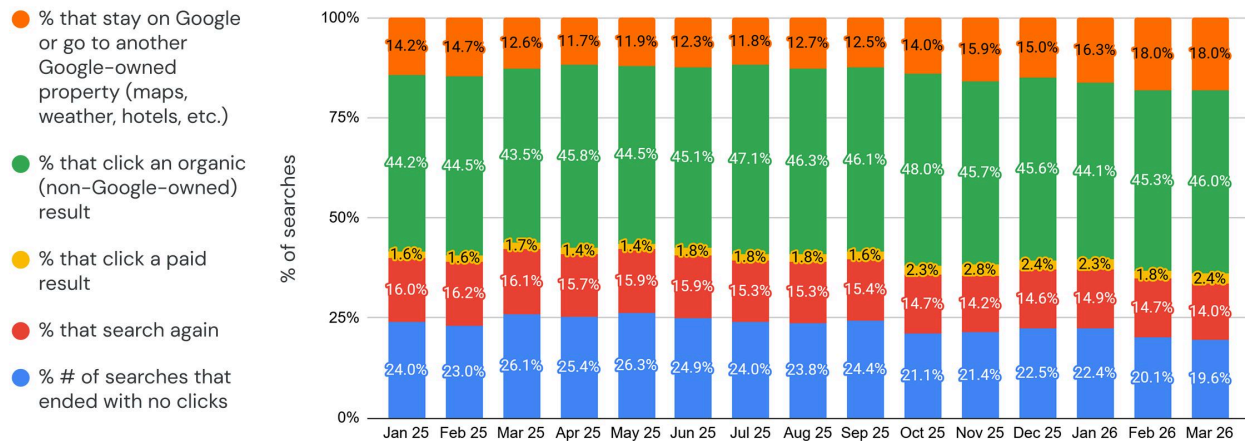
In the US, zero-click searches continued to decline in Q1 2026, falling from 24.5% in December to 22.4% in March, the lowest level in the period.

Organic click-through increased following a December dip, rising from 42.0% to 44.9% by March. Paid clicks remained stable at elevated levels between 2.1% and 2.3%, above early-2025 levels.

Search refinement behavior held steady at 15–16%, while clicks to Google-owned properties showed no clear trend, ending at 14.8%, in line with prior levels.



Distribution of Google EU & UK desktop search clicks over time



SparkToro

Source: Datos

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In the EU and UK, zero-click searches continued to decline in Q1 2026, falling from 22.5% in December to 19.6% in March, the lowest level in the period.

Organic click share remained strong, increasing slightly from 45.6% to 46.0% and staying within the 44–48% range. At the same time, clicks to Google-owned properties rose from 15.0% to 18.0%, reaching their highest levels.

Paid clicks held steady at 2.3–2.4%, while search refinement declined to around 14% by March, down from closer to 16% earlier in the year.

Rand's Take

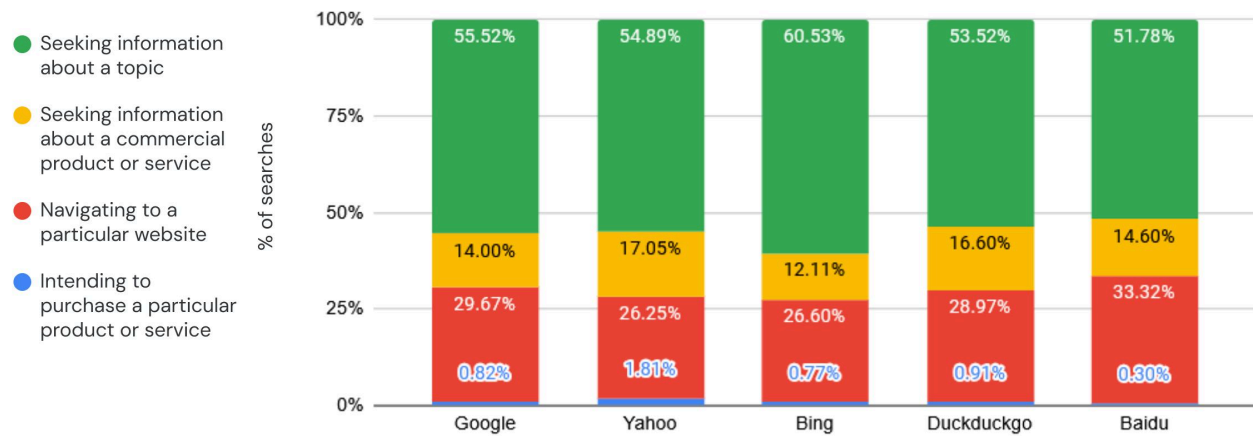
Rand Fishkin
SparkToro Co-founder & CEO



There's a rare spot of hope here for publishers and creators on the web – zero click searches declined a bit, and traffic to the open web rose. It's been a long time since the trend moved in this direction (and, granted, this is desktop only, so we're missing the 2/3rds of searches that happen on mobile), but hopefully it means a bit more stability and less of the traffic-shrinking apocalypse we've seen the last five years.



Categorization of US desktop search intent in Q1 2025

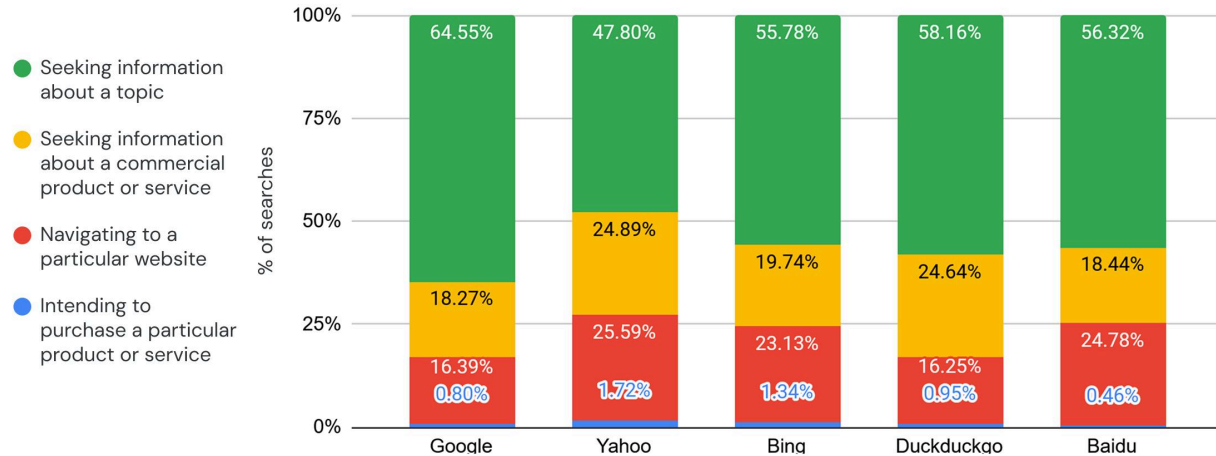


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Source: Datos

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Categorization of US desktop search intent in Q1 2026



SparkToro

Source: Datos

Datos
A Semrush Company

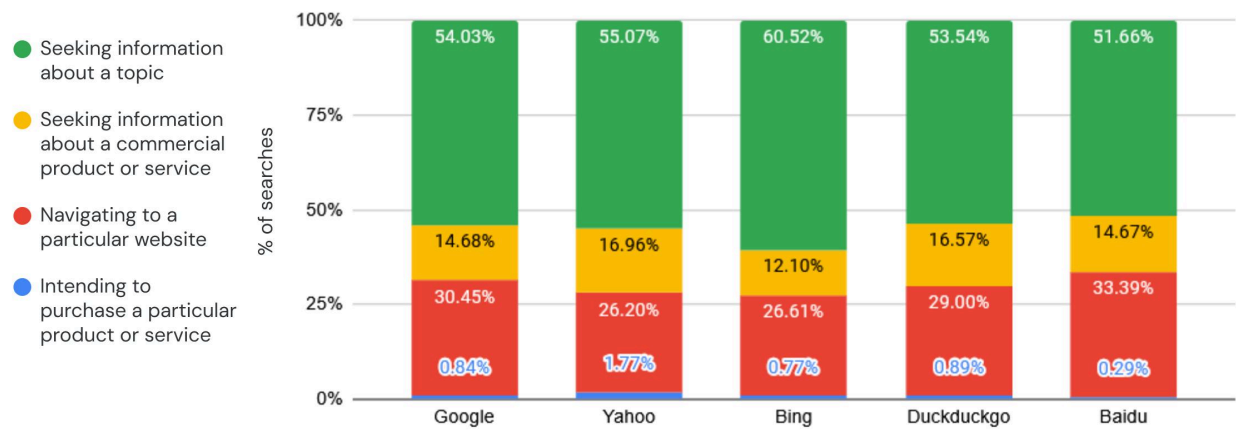
In the US, informational intent increased overall in Q1 2026, most notably on Google, rising to 64.6%, while declining on Yahoo compared to 2025.

Commercial intent grew across all engines, with the largest gains on Yahoo and DuckDuckGo, where it reached 24.9% and 24.6% respectively. In contrast, navigational intent declined across the board, with the sharpest drop on Baidu.

Purchase intent remained minimal, showing only slight increases and no meaningful structural change.



Categorization of EU & UK desktop search intent in Q1 2025

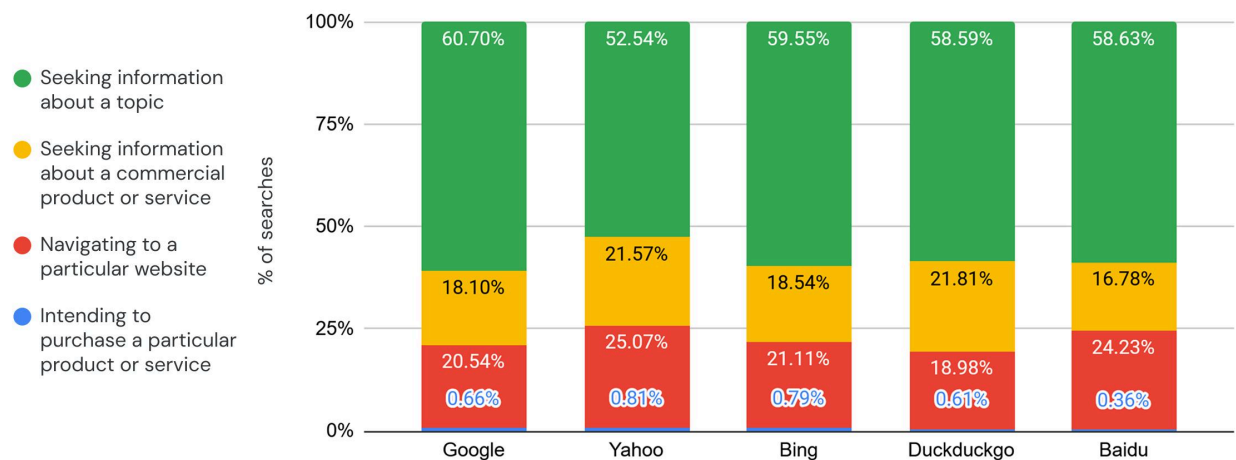


SparkToro

Source: Datos

Datos
A Semrush Company

Categorization of EU & UK desktop search intent in Q1 2026



SparkToro

Source: Datos

Datos
A Semrush Company

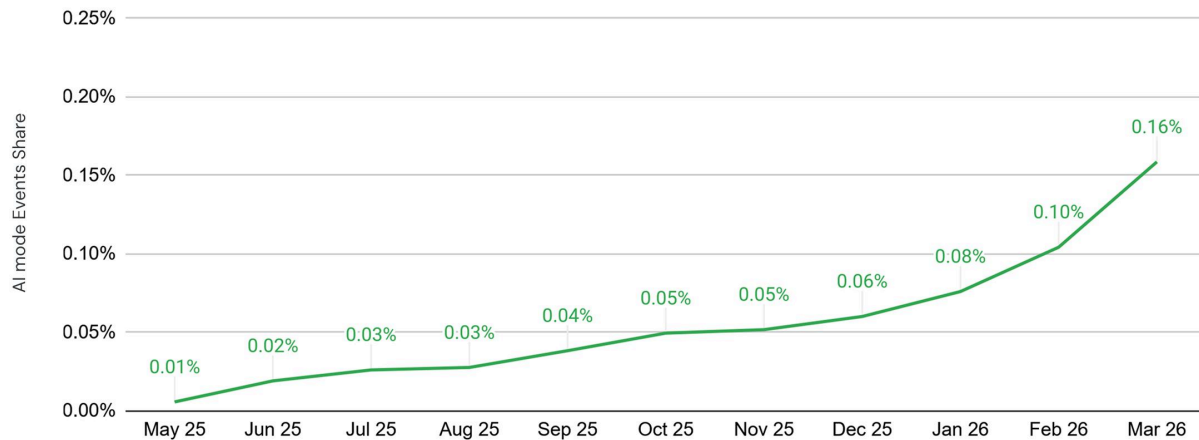
In the EU and UK, informational intent increased across most engines in Q1 2026, with notable gains on Google (60.7%) and Baidu (58.6%), while remaining broadly flat to slightly lower on Bing.

Commercial intent showed moderate growth, particularly on Bing and DuckDuckGo, reaching 18.5% and 21.8% respectively, while remaining more stable on Yahoo.

Navigational intent declined consistently across engines, with the most visible drops on Google and DuckDuckGo. Purchase intent remained negligible, with only marginal changes across all platforms.



Google AI Mode visits in the US



Monthly AI mode Events Share (%) = Monthly visits to AI mode's webpages / Total monthly webpage visits across entire panel * 100



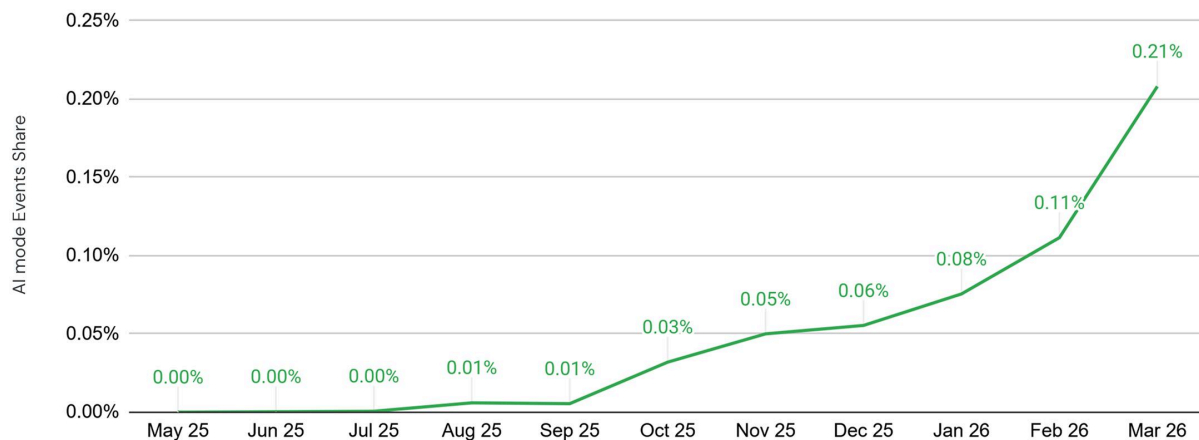
Source: Datos



In the US, Google AI Mode adoption accelerated in Q1 2026, increasing from 0.06% in December to 0.16% in March, a 2.5x rise over the quarter.

Growth was gradual through 2025 but clearly gained momentum entering 2026. Despite this acceleration, overall share remains below 0.2%, indicating early-stage adoption with continued growth potential.

Google AI Mode visits in EU & UK



Monthly AI mode Events Share (%) = Monthly visits to AI mode's webpages / Total monthly webpage visits across entire panel * 100



Source: Datos





In the EU and UK, Google AI Mode adoption accelerated sharply in Q1 2026, increasing from 0.06% in December to 0.21% in March.

Adoption started later than in the US, remaining near zero through mid-2025 before gaining traction in the second half of the year. By Q1 2026, AI Mode usage in the region surpassed US levels, despite the delayed rollout.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



AI Mode grew faster in March than any month yet (in both regions). That suggests Google's getting more aggressive about pushing it, and users are responding. I think we're just at the start of a trend that could end in double digit percentages.

Top US search destination domains Q1 2025 – Q1 2026

After a search, which domains were most often visited? This next section lists the top 15 domains, comparing Q1 2025 with Q1 2026.

Top domains visited from US desktop traditional search engines

Q1 2025		Q1 2026	
1 Youtube	9 Tiktok	1 Youtube	9 Chatgpt
2 Facebook	10 LinkedIn	2 Reddit	10 LinkedIn
3 Reddit	11 Github	3 Amazon	11 Microsoft
4 Instagram	12 Amazon	4 Facebook	12 Ebay
5 Chatgpt	13 Google	5 Wikipedia	13 X
6 Whatsapp	14 Stackoverflow	6 Instagram	14 Github
7 X	15 Canva	7 Fandom	15 Walmart
8 Wikipedia		8 Tiktok	

Note: Destination domains are defined as the next domain visited following interaction with a search engine, highlighting downstream browsing behavior.

Source: *Datos*





In the EU and UK, Google AI Mode adoption accelerated sharply in Q1 2026, increasing from 0.06% in December to 0.21% in March.

Adoption started later than in the US, remaining near zero through mid-2025 before gaining traction in the second half of the year. By Q1 2026, AI Mode usage in the region surpassed US levels, despite the delayed rollout.

Top platforms shift toward information and commerce

- ✓ YouTube remained the leading destination, while Reddit and Wikipedia strengthened their positions, rising to #2 and #5 respectively.
- ✓ The top tier shows moderate reordering, with Amazon moving into the top 3 and Facebook declining from its previous position.
- ✓ Notably, ChatGPT dropped from #5 to #9.

E-commerce gains visibility

- ✓ Amazon entered the top 3, while eBay and Walmart joined the top 15.
- ✓ These changes point to stronger search-driven engagement with commerce platforms.

Social platforms diverge

- ✓ Reddit and TikTok gained ground, with TikTok entering the top 10.
- ✓ In contrast, Facebook declined and X dropped from #7 to #13, indicating shifting engagement within social platforms.

New domains enter as others exit

- ✓ Fandom and Microsoft entered the top 15.
- ✓ They replaced a mix of content and utility platforms, including WhatsApp, Google, Stack Overflow, and Canva.



Top European search destination domains Q1 2025 – Q1 2026

Top domains visited from from EU & UK desktop traditional search engines

Q1 2025		Q1 2026	
1 Youtube	9 Google	1 Youtube	9 Tiktok
2 Facebook	10 Github	2 Reddit	10 Fandom
3 Reddit	11 Msn	3 Wikipedia	11 LinkedIn
4 Instagram	12 Netflix	4 Facebook	12 Github
5 Chatgpt	13 Copilot	5 Amazon	13 Steampowered
6 Wikipedia	14 LinkedIn	6 Instagram	14 Ebay
7 X	15 Stackoverflow	7 Chatgpt	15 Pinterest
8 Whatsapp		8 Microsoft	

Note: Destination domains are defined as the next domain visited following interaction with a search engine, highlighting downstream browsing behavior.

Source: Datos



Top platforms shift toward informational destinations

- ✓ YouTube remained the leading destination, while Reddit and Wikipedia strengthened their positions, rising to #2 and #3 respectively.
- ✓ This shift highlights increased prominence of information-driven search behavior.
- ✓ ChatGPT also dropped (though slightly less dramatically than in the US) from #5 to #7.

E-commerce gains visibility

- ✓ Amazon entered the top 5, while eBay joined the top 15.
- ✓ These changes indicate stronger integration of commerce platforms into search-driven journeys.



Social platforms diverge

- ✓ Reddit and TikTok gained ground, with TikTok entering the top 10.
- ✓ In contrast, Facebook and Instagram declined, while X dropped out of the top 15 entirely.

New domains enter as others exit

- ✓ Fandom, SteamPowered, Pinterest, and Microsoft entered the top 15.
- ✓ They replaced a mix of entertainment, utility, and communication platforms, including Netflix, WhatsApp, Google, Copilot, and Stack Overflow.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

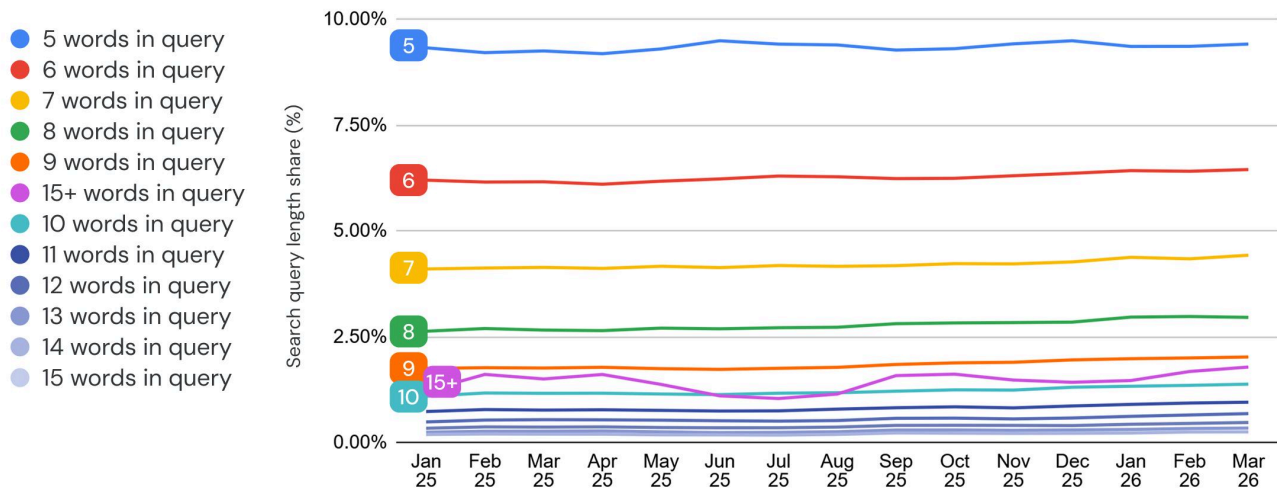


The most shocking bit to me is that despite being desktop-only, both TikTok and Instagram (whose platforms are still built primarily for native mobile app usage) are rising into the top 10 in both regions. Reddit's growth is also remarkable, and between the three of these platforms, I'd estimate a huge amount of sentiment, opinion, and influence is being created (probably on par with YouTube). If you're not present in those places with native content, you're probably missing out.



Changes in query length distribution

Changes in query length distribution in the US (by number of words)



Share of searches by query length = Number of Google searches with a specific query length (measured in words) / the total number of Google searches * 100



Source: Datos



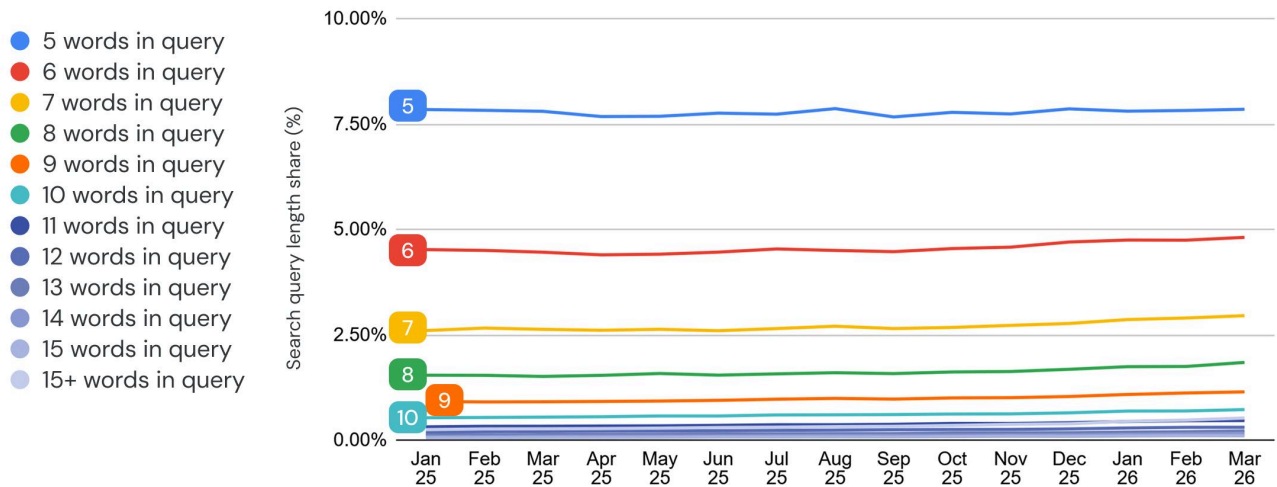
In the US, mid-length queries (6–9 words) continued to grow in Q1 2026, with 6-word queries reaching 6.3% and 7-word queries 4.4%, reinforcing a shift toward more detailed search behavior.

Longer queries (10+ words) also increased gradually, with 15+ word queries rebounding to 1.7% by March after a late-2025 dip.

Shorter queries remained stable, with 5-word searches holding between 9.2% and 9.5%, indicating no meaningful decline despite the rise in longer formats.



Changes in query length distribution in the EU & UK (by number of words)



Share of searches by query length = Number of Google searches with a specific query length (measured in words) / the total number of Google searches * 100



Source: Datos



In the EU and UK, mid-length queries (6–8 words) drove most of the growth in Q1 2026, with 6-word queries rising toward 4.7–4.8% and 7–8 word queries also trending upward.

Longer queries (10+ words) increased gradually but remained a small share overall.

Shorter queries stayed stable, with 5-word searches holding between 7.7% and 8.0%, indicating that growth in longer queries is additive rather than replacing shorter searches.

Key takeaways for traditional search

✓ Traditional search remains the dominant driver of desktop discovery

Across the US and EU and UK, traditional search held a stable share of total activity, with only minor fluctuations and no meaningful loss of overall dominance.

✓ Zero-click behavior declined

The share of searches ending without a click decreased across both regions, while organic click-through increased, indicating more searches now result in downstream engagement.

✓ AI tools continue to grow without displacing search

AI tool usage expanded steadily and accelerated into Q1 2026, while Google AI Mode also showed rapid growth from a low base, suggesting integration alongside traditional search rather than replacement.



✓ Search behavior is shifting toward more detailed queries

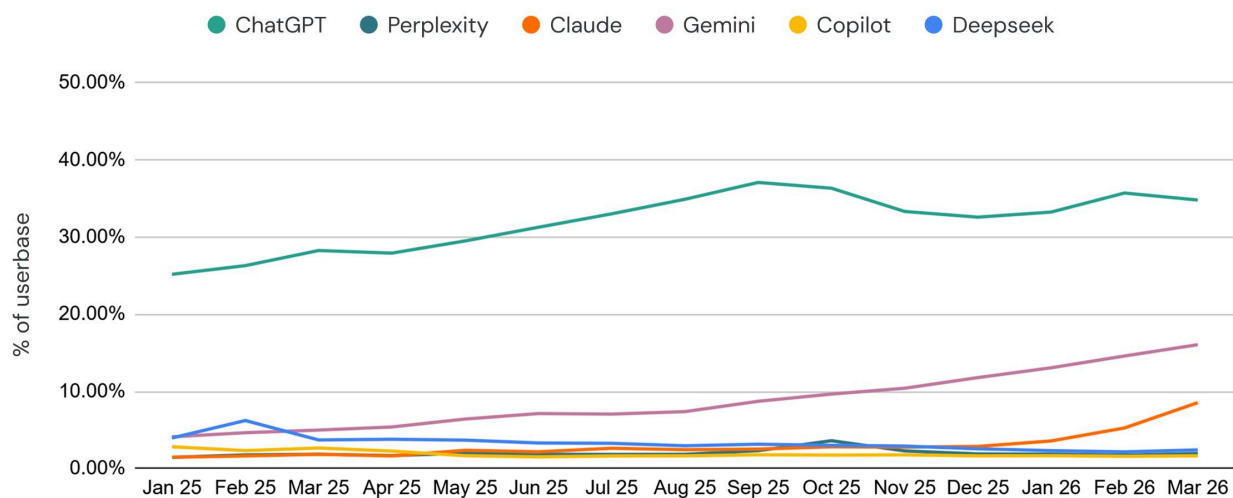
Mid-length and longer queries continued to grow, while shorter queries remained stable, indicating users are refining how they search rather than changing platforms.

✓ Search intent shows gradual evolution, not disruption

Informational intent increased across most engines, commercial intent grew moderately, and navigational intent declined, while purchase intent remained minimal, pointing to incremental shifts in user behavior.

State of AI search

Share of desktop users using AI in the US



Monthly % of userbase = $\frac{\text{Number of unique users visiting the domain's webpages (monthly) at least once}}{\text{Total number of unique panel users (monthly)}} \times 100\%$

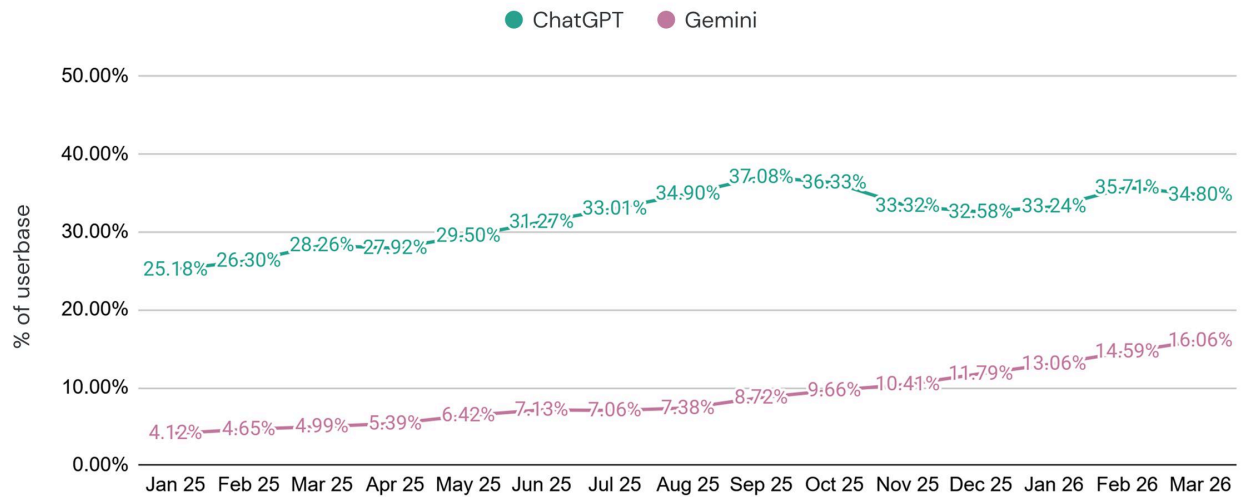
SparkToro

Source: Datos

Datos
A Semrush Company



Share of desktop users using AI in the US



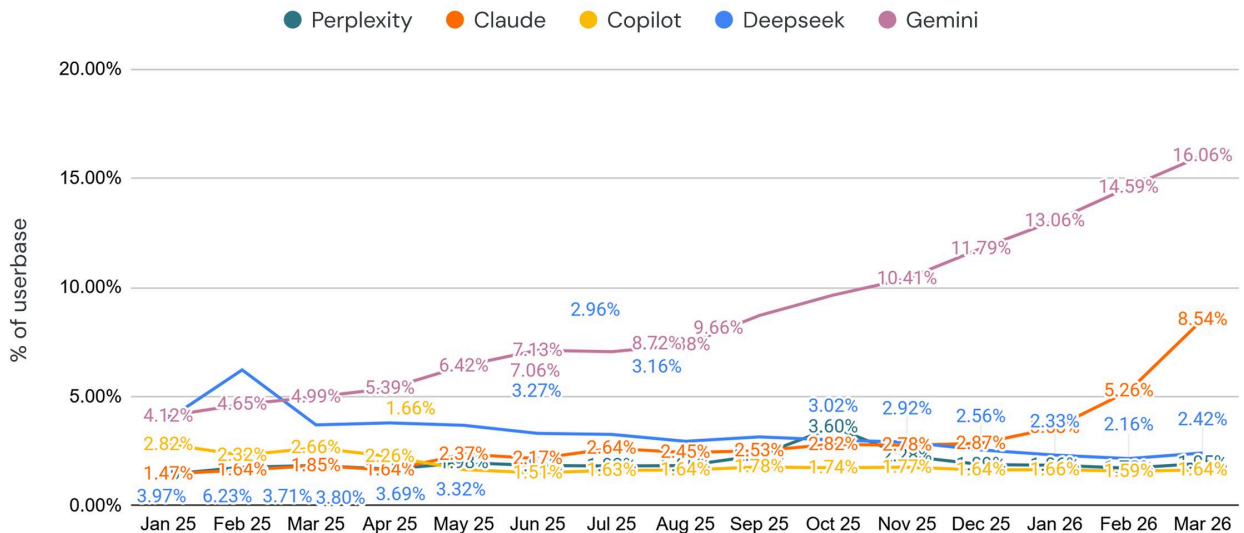
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SparkToro

Source: Datos

Datos
A Semrush Company

Share of desktop users using AI in the US



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SparkToro

Source: Datos

Datos
A Semrush Company

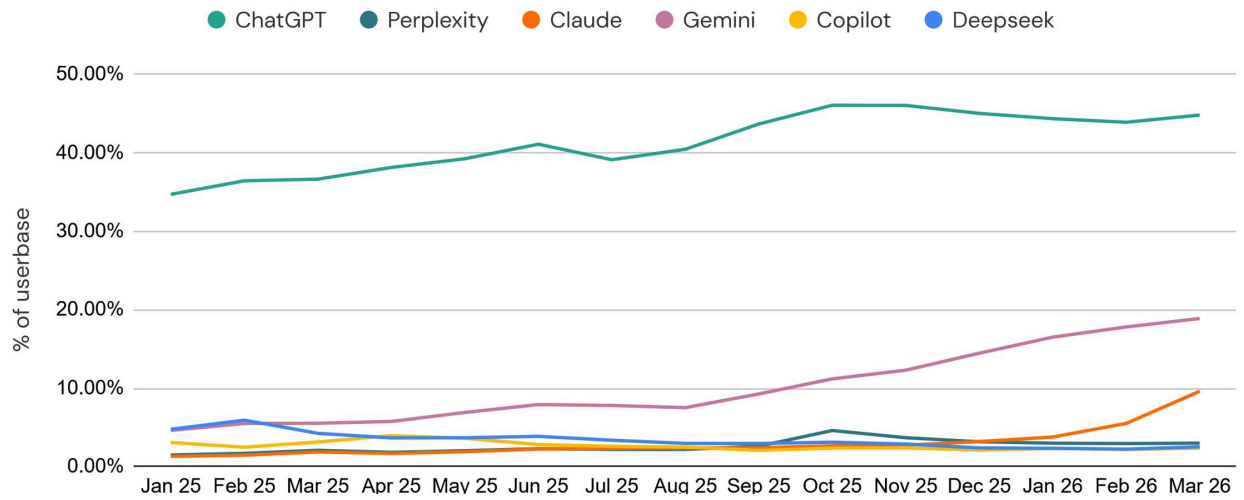
In the US, ChatGPT remained the clear leader in Q1 2026, stabilizing in the low-to-mid 30% range after peaking at 37.08% in September 2025 and ending at 34.80% in March.

Gemini continued rapid growth, rising from 10.41% in November to 16.06% in March, firmly establishing itself as the second-largest AI tool.

Claude showed the strongest acceleration in Q1, increasing from 3.58% to 8.54% over the quarter. In contrast, other tools such as Perplexity, Copilot, and DeepSeek remained niche, with relatively flat or declining usage.



Share of desktop users using AI in the EU & UK



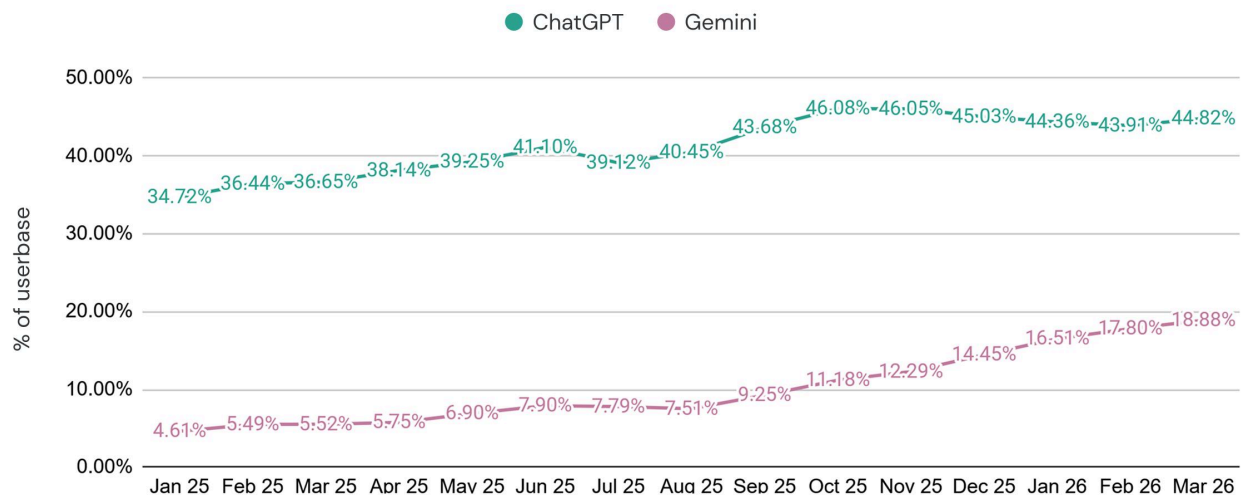
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SparkToro

Source: Datos

Datos
A Semrush Company

Share of desktop users using AI in the EU & UK



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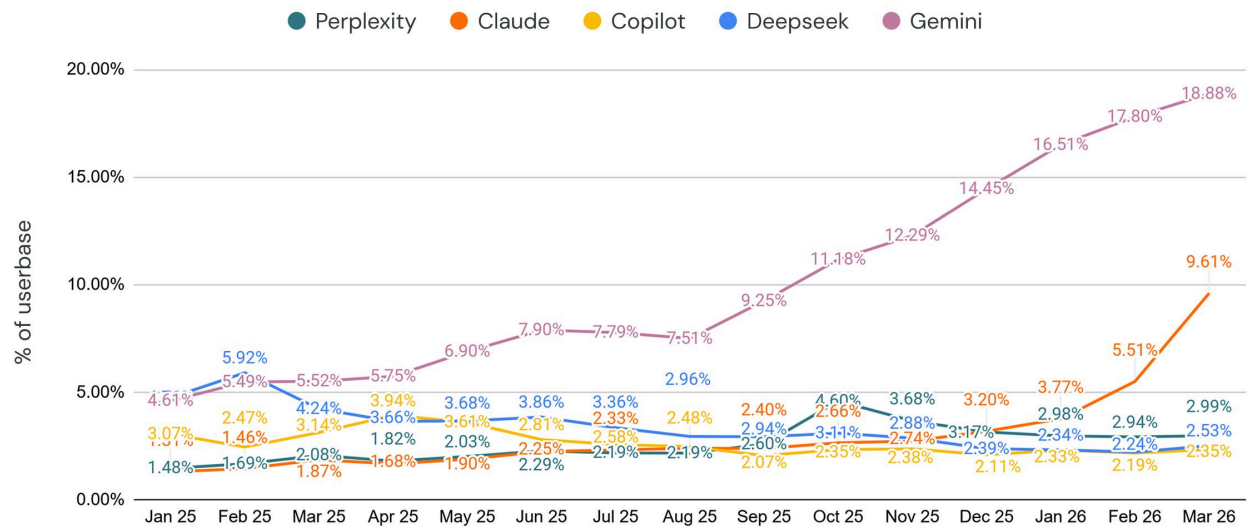
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Source: Datos

Datos
A Semrush Company



Share of desktop users using AI in the EU & UK



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%

SparkToro

Source: Datos

Datos
A Semrush Company

In the EU and UK, ChatGPT remained the clear leader in Q1 2026, easing slightly but still holding above 44%, ending at 44.82% in March.

Gemini continued strong growth, rising from 12.29% in November to 18.88% in March, firmly maintaining second position.

Claude accelerated sharply in Q1, increasing from 3.77% to 9.61%. Other tools, including Perplexity, Copilot, and DeepSeek, remained secondary, with only minor growth.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



Here we can see that the common media narrative of ChatGPT stagnating while Gemini and Claude rise appears to be entirely valid. I wouldn't be shocked to see either or both of those properties dislodging ChatGPT from the lead position in the next 2-3 years. Anyone who's worrying about their brand presence in ChatGPT should be paying at least as much attention to Gemini and Claude.



Top US AI destination domains Q1 2025 – Q1 2026

Top domains visited from US desktop AI tools

Q1 2025		Q1 2026	
1 Google	9 Reddit	1 Google	9 Facebook
2 Youtube	10 Wikipedia	2 Youtube	10 Apple
3 Github	11 Amazon	3 Microsoft	11 Nih
4 Sora	12 Linkedin	4 Github	12 Linkedin
5 Microsoft	13 Researchgate	5 Chatgpt	13 Wikipedia
6 Facebook	14 Canva	6 Amazon	14 Canva
7 Instagram	15 X	7 Gemini	15 Bing
8 Nih		8 Reddit	

Note: Destination domains are defined as the next domain visited following interaction with an AI website, highlighting downstream browsing behavior.

Source: Datos



Core platforms remain dominant

- ✓ Google and YouTube held the top two positions, while Microsoft rose into the top 3.
- ✓ This reinforces the concentration of AI-driven traffic around major platforms.

AI ecosystem consolidates

- ✓ ChatGPT climbed to #5, while Gemini entered the top 10 at #7.
- ✓ Sora disappeared as a standalone destination. Sora’s retirement was announced on 24 March 2026.



Commerce gains visibility

- ✓ Amazon moved up significantly from #11 to #6.
- ✓ This suggests increasing product-oriented use cases within AI-driven browsing.

Social platforms show mixed movement

- ✓ Reddit rose from #9 to #8, while Facebook declined from #6 to #9.
- ✓ Instagram and X dropped out of the top 15 entirely.

Professional and knowledge platforms shift slightly

- ✓ LinkedIn (#12) and Canva (#14) remained stable.
- ✓ More traditional knowledge sources Wikipedia and NIH declined in rank.



Top European AI destination domains

Top domains visited from EU & UK desktop AI tools

Q1 2025		Q1 2026	
1 Google	9 Wikipedia	1 Google	9 Wikipedia
2 Youtube	10 LinkedIn	2 Youtube	10 Reddit
3 Microsoft	11 Reddit	3 Microsoft	11 Apple
4 Github	12 Researchgate	4 Github	12 LinkedIn
5 Sora	13 Canva	5 Amazon	13 Instagram
6 Facebook	14 X	6 Facebook	14 Canva
7 Nih	15 Chatgpt	7 Chatgpt	15 Whatsapp
8 Instagram		8 Gemini	

Note: Destination domains are defined as the next domain visited following interaction with an AI website, highlighting downstream browsing behavior.

Source: Datos



Top platforms stay on top

- ✓ Google, YouTube, Microsoft, and GitHub retained the top four positions.

AI tools reshuffle within the ranking

- ✓ ChatGPT rose sharply from #15 to #7, while Gemini entered at #8.
- ✓ At the same time, Sora dropped out of the top 15, indicating consolidation under fewer AI entry points.

Commerce gains visibility

- ✓ Amazon moved into the top 5, suggesting growing product-oriented use cases within AI-driven browsing.



Social platforms show mixed movement

- ✓ Reddit moved into the top 10, while Facebook remained stable at #6.
- ✓ Instagram declined from #8 to #13, and X dropped out of the ranking.

Knowledge and general-use platforms shift

- ✓ Wikipedia held its position, while NIH and ResearchGate exited the top 15.
- ✓ Apple (#11) and WhatsApp (#15) entered, while LinkedIn and Canva remained broadly stable.

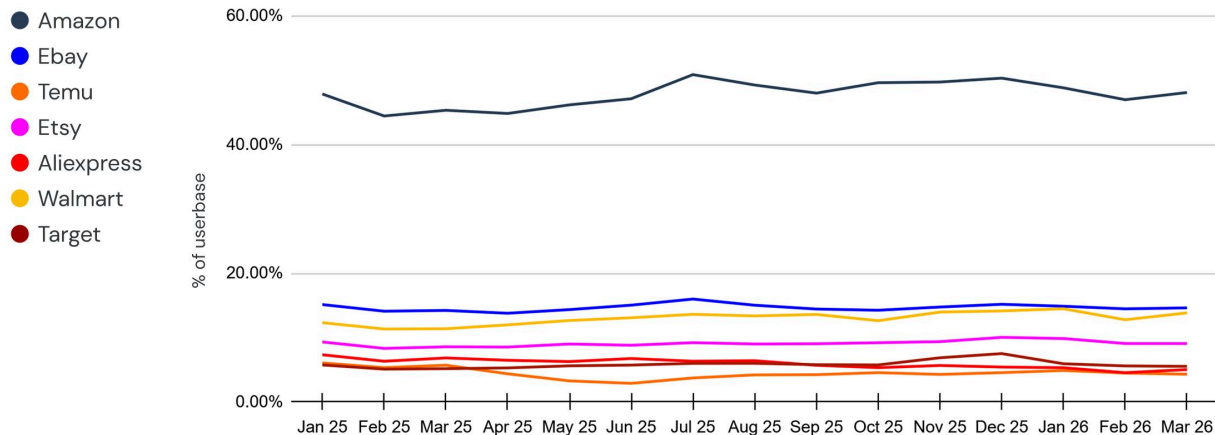
Key takeaways for AI search

- ✓ **AI usage continues to expand across regions**
Adoption increased steadily in both the US and EU and UK, with acceleration in Q1 2026 pointing to continued normalization of AI tools in everyday workflows.
- ✓ **ChatGPT remains the dominant player**
It retained the largest share of users across both regions, stabilizing at high levels despite increased competition.
- ✓ **Gemini has established itself as the clear #2**
Strong and consistent growth allowed Gemini to secure second place, with no other tool matching its scale.
- ✓ **Emerging tools show bursts of growth but remain secondary**
Claude saw sharp acceleration in Q1 2026, while other tools such as Perplexity, Copilot, and DeepSeek remained niche with limited share.
- ✓ **AI-driven browsing reinforces existing ecosystems**
Traffic from AI tools continues to concentrate around major platforms, with increased visibility for commerce and general-use destinations rather than new standalone ecosystems.



State of E-commerce

Share of desktop users on e-commerce websites in the US



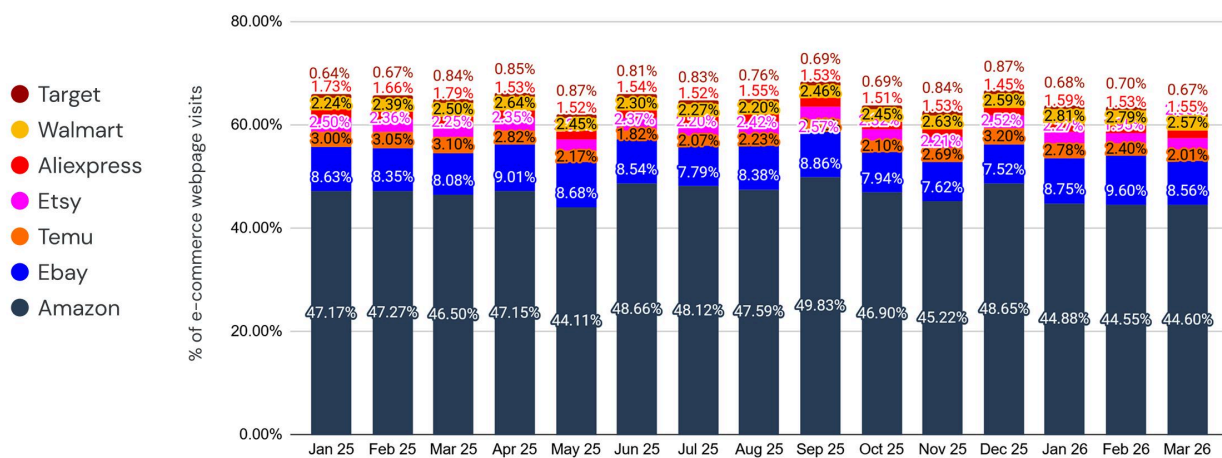
Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%

SparkToro

Source: Datos

Datos
A Semrush Company

Share of desktop e-commerce webpage visits in the US



% of e-commerce webpage visits = Number of webpage visits to a given retail domain / Total number of retail-related webpage visits in the panel * 100%

SparkToro

Source: Datos

Datos
A Semrush Company



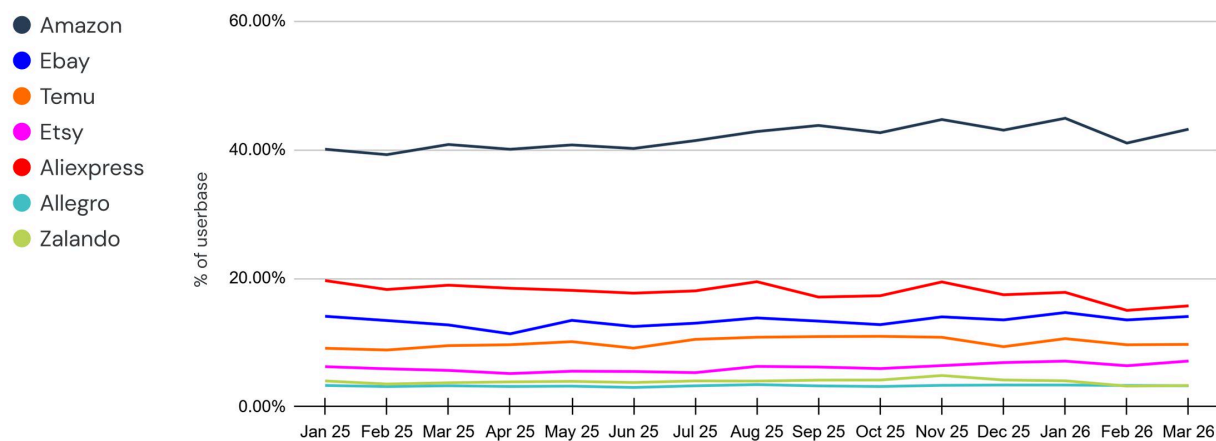
In the US, e-commerce activity on desktop remained stable in Q1 2026, with no major shifts in platform hierarchy or user behavior.

Amazon continued to dominate, holding between 47–50% of users, though its share softened in webpage visits, declining to 44.6% by March. This suggests stable reach but slightly reduced engagement intensity.

eBay and Walmart remained a consistent second tier, with limited variation in user share. eBay showed modest growth in visit share, rising to around 9% in Q1, while Walmart remained broadly unchanged.

Etsy maintained its mid-tier position with steady performance across both users and visits. Temu and AliExpress continued to operate at lower levels, fluctuating without sustained growth or clear upward momentum.

Share of desktop users on e-commerce websites in the EU & UK



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%

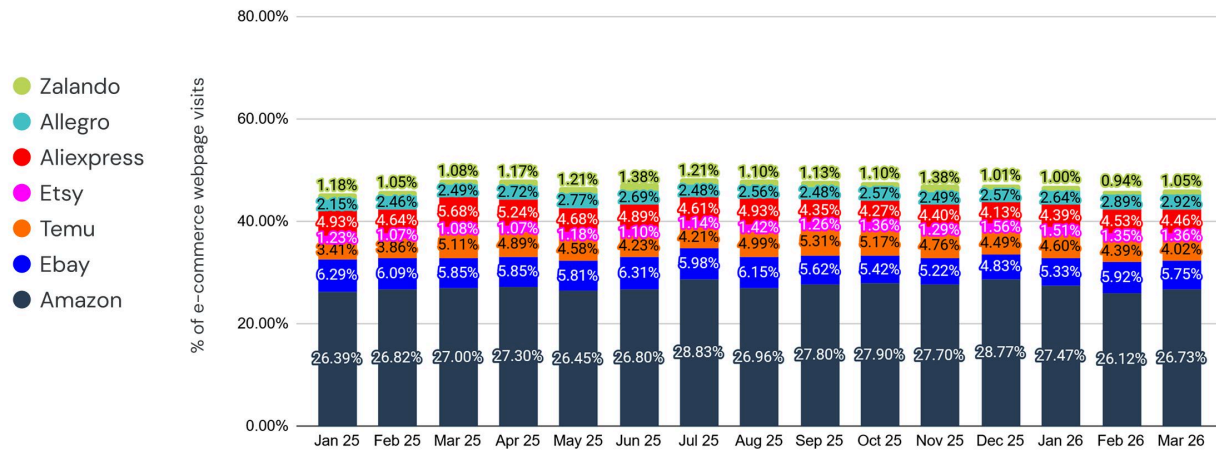
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Source: Datos

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Share of desktop e-commerce webpage visits in the EU & UK



% of e-commerce webpage visits = Number of webpage visits to a given retail domain / Total number of retail-related webpage visits in the panel * 100%

SparkToro

Source: Datos

Datos
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In the EU and UK, desktop e-commerce behavior remained stable in Q1 2026, with no major shifts in platform hierarchy.

Amazon continued to lead, holding between 41–44% of users and around 26–27% of visits, with only minor fluctuations. AliExpress and eBay remained strong second-tier platforms, showing some variability but no clear directional trend.

Temu and Etsy maintained stable positions with limited change, while Allegro and Zalando continued to operate at lower, steady levels.

Rand's Take

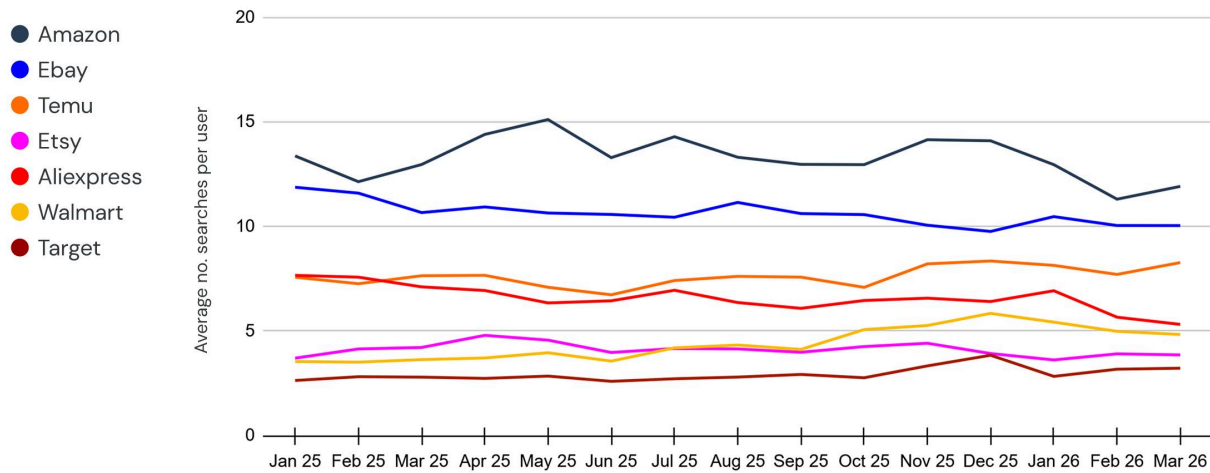
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SparkToro Co-founder & CEO



While there's no major fluctuations here, it is nice to see Amazon declining in the US a bit. Hopefully, more diversity in behavior will lead to opportunities for other retailers. It's a great time to be selling on your own domain and building customer loyalty with your visitors vs. outsourcing everything to Amazon.



Searches per searcher on desktop e-commerce platforms in the US



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month / Number of unique users visiting the domain's webpages (monthly) at least once



Source: Datos

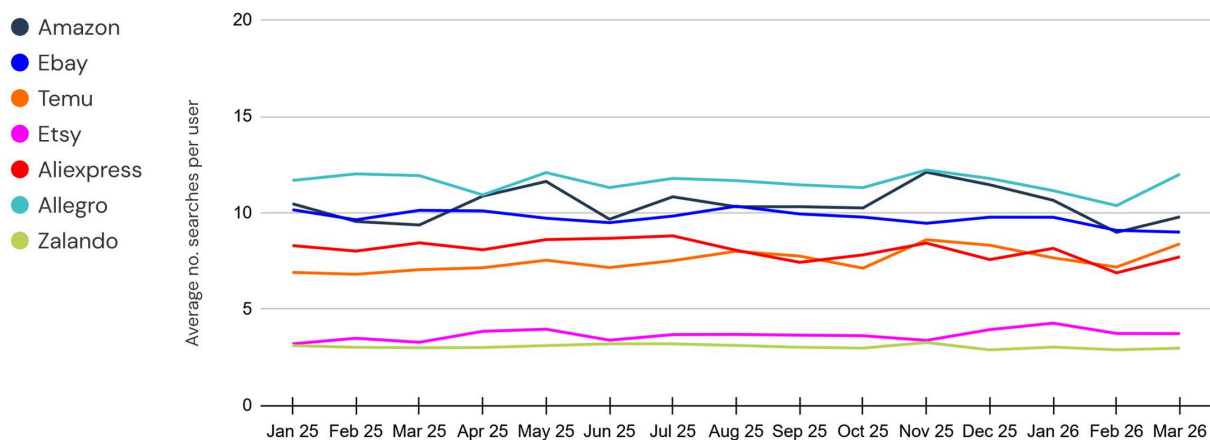


In the US, e-commerce search intensity declined slightly in Q1 2026. Amazon fell from late-2025 highs to around 11–12 searches per user.

eBay remained stable at around 10 searches per user, showing no meaningful change. Temu increased modestly, reaching above 8, while AliExpress continued a gradual decline.

Walmart softened following a Q4 peak, while Etsy and Target remained broadly stable with limited variation.

Searches per searcher on desktop e-commerce platforms in the EU & UK



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month / Number of unique users visiting the domain's webpages (monthly) at least once



Source: Datos





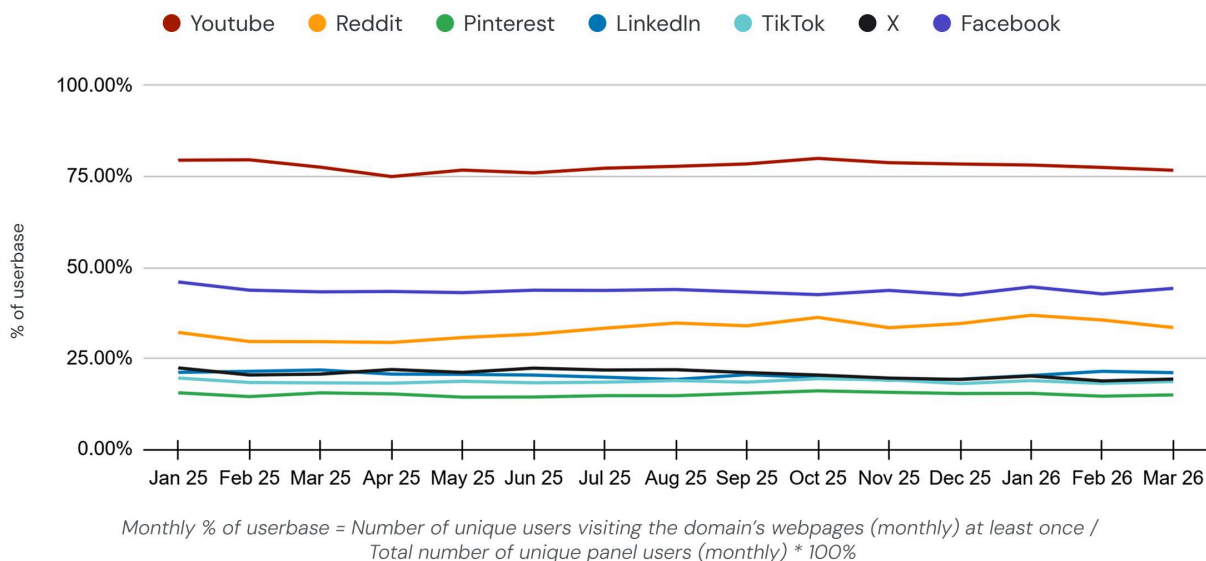
In the EU and UK, e-commerce search intensity showed mild softening in Q1 2026. Amazon dipped below 10 searches per user before a slight rebound in March.

Allegro remained the highest and most stable platform, holding between 10–12 searches per user despite a February dip seen across platforms. eBay stayed flat at 9–10, while Temu and AliExpress rebounded in March after a February decline.

Etsy and Zalando remained steady at lower levels, with roughly half the search intensity of leading platforms.

State of social content platforms search

Share of desktop users on content platforms in the US



Source: Datos



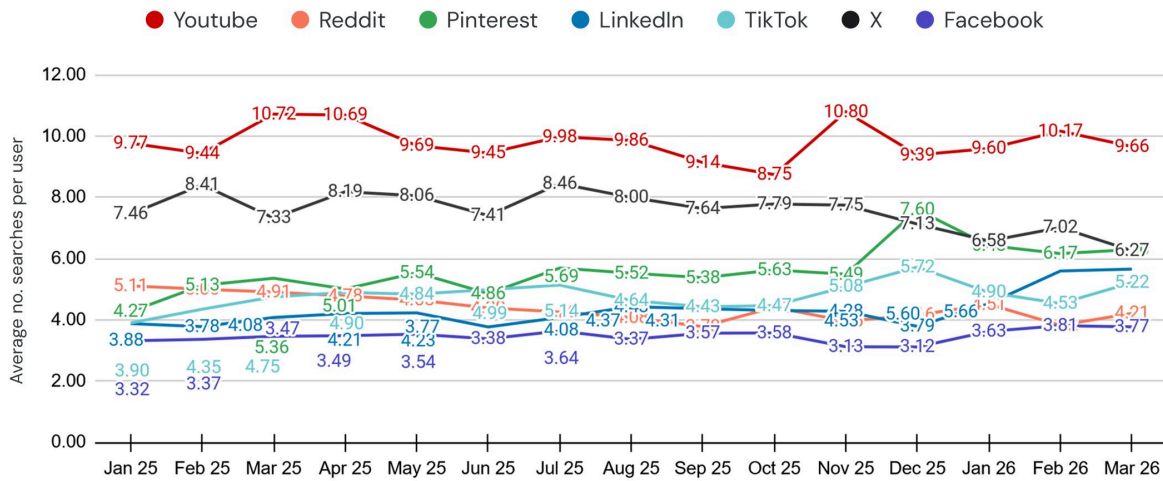
In the US, YouTube remained the top content platform, holding a stable share of 75–76% through Q1 2026.

Facebook's user share increased during the quarter, overtaking Reddit by March. Reddit peaked in January before declining slightly.

Other platforms, including X, LinkedIn, TikTok, and Pinterest, remained stable with only minor fluctuations.



Searches per US desktop user on content platforms



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month / Number of unique users visiting the domain's webpages (monthly) at least once



Source: Datos

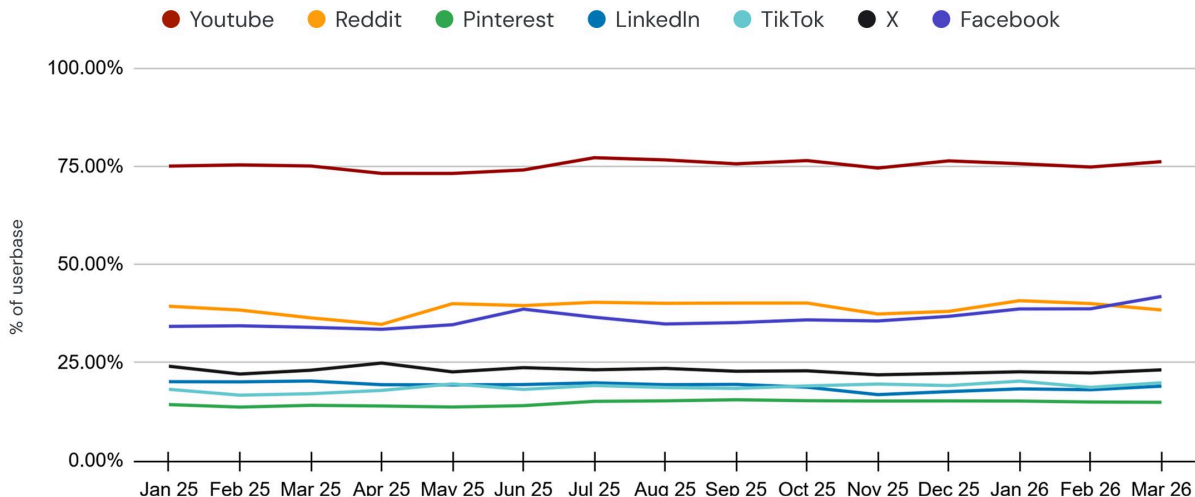


In the US, YouTube maintained the highest search intensity, holding between 9–10 searches per user with stable performance through Q1 2026.

X declined over the quarter, dropping to around 6 searches per user by March. Pinterest also softened after a December peak.

LinkedIn and TikTok fluctuated within the mid-tier, while Reddit and Facebook remained lower and broadly stable.

Share of desktop users on content platforms in the EU & UK



Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%



Source: Datos

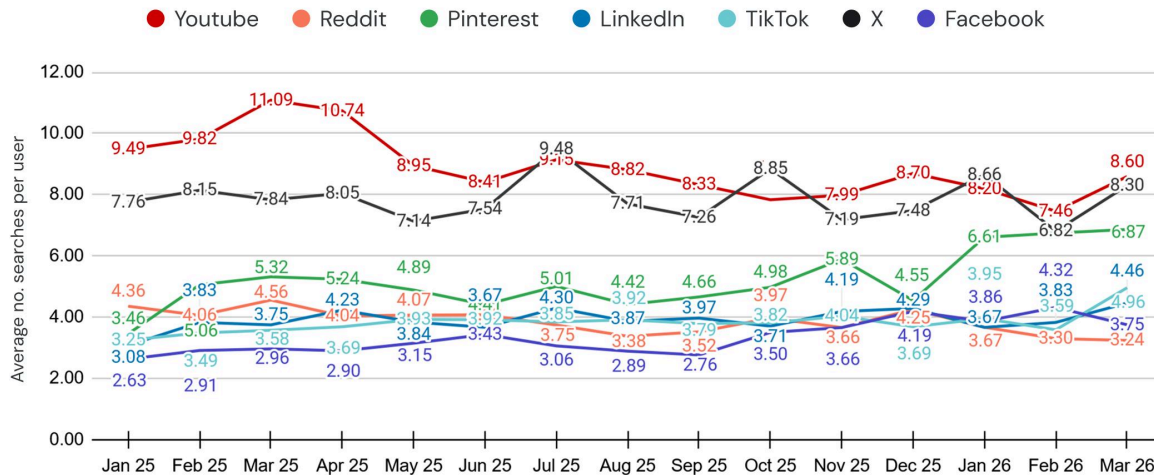




In the EU and UK, YouTube remained the dominant content platform, holding 76–78% of users, with slight softening toward March. Facebook stayed strong at 42–44%, while Reddit peaked early in Q1 before declining.

Other platforms, including X, LinkedIn, TikTok, and Pinterest, remained stable in user share with minimal variation.

Searches per EU & UK desktop user on content platforms



Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month / Number of unique users visiting the domain's webpages (monthly) at least once



Source: Datos



In terms of engagement, YouTube dipped in February before rebounding to 8.6 searches per user in March. X followed a similar pattern, recovering to 8.3.

Pinterest increased steadily, reaching 6.6–6.9, while LinkedIn and TikTok trended upward. In contrast, Facebook and Reddit declined over the quarter.

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It's a bit more nuanced in the EU/UK, but if you look at the US, you see more and more people searching on nearly every social platform, which is great! Search happens everywhere, and marketers, as I've mentioned, need to be present in those places to have a chance at showing up.



Key Takeaways

✓ Search behavior remains stable, with gradual shifts rather than disruption

Across regions, traditional search continues to dominate, with only minor fluctuations in share, engagement, and platform hierarchy.

✓ AI adoption accelerates but remains complementary to search

AI tools saw continued growth, with clear leaders emerging and usage expanding steadily, while Google AI Mode showed rapid early adoption from a low base.

✓ User engagement trends point to higher interaction quality

Declining zero-click rates and stable or rising organic click-through suggest more searches are leading to meaningful engagement.

✓ Users are refining how they search

Growth in mid-length and longer queries indicates a shift toward more detailed search behavior, while shorter queries remain stable.

✓ Platform ecosystems remain concentrated with incremental shifts

Across search, AI, e-commerce, and content platforms, dominant players retained their positions, while secondary platforms showed gradual gains without major disruption.

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Keep a close eye on four things: searchers per searcher in Google, which AI tools are growing vs. shrinking/stagnating, the share of visits/searches to social platforms, and the growth of Google's AI Mode – those are the places we're seeing the most change, and the most emergent opportunity.

Get in touch to find out more applications of clickstream data

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About Datos, A Semrush Company

Datos is a global clickstream data provider focused on licensing anonymized, at scale, privacy-secured datasets to ensure its clients and partners are safe in an otherwise perilous marketplace. Datos offers access to the desktop and mobile browsing behavior for tens of millions of users across the globe, packaged into clean, easy to understand data products. Datos' mission is to provide clickstream data built on trust, and driven by tangible results. Major firms around the globe trust Datos to provide the data they need to stop operating blindly in an ever-changing digital landscape. Datos was founded in 2019 and has offices in New York City (HQ), Spain, and Germany.

Notes on data presentation/methodology

The data displayed in this report has been provided by Datos, A Semrush Company. The analysis is based on Datos' US, EU and UK panels, representing a diverse and statistically significant sample of users, and covers the months of January – March 2026. For further information please visit Datos's [website](#) and its [Privacy Policy](#).

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