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State of Search Q3 2025:
Behaviors, Trends, and Clicks Across the US & Europe

Q3 2025

Introduction

Since Q2 2025, the search landscape has continued to develop, with user behavior signaling a shift from experimentation to integration.

AI tools that surged in early 2025 have now found a rhythm within daily search and browsing routines, while traditional search remains resilient, holding its position as the backbone of online discovery.

Spanning July 2024 to June 2025, this report explores how search behaviors have developed across the US and Europe: what users are searching for, where they're doing it, and how those patterns are shifting as AI becomes more central to the experience.

At Datos, we process billions of anonymized 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 you 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

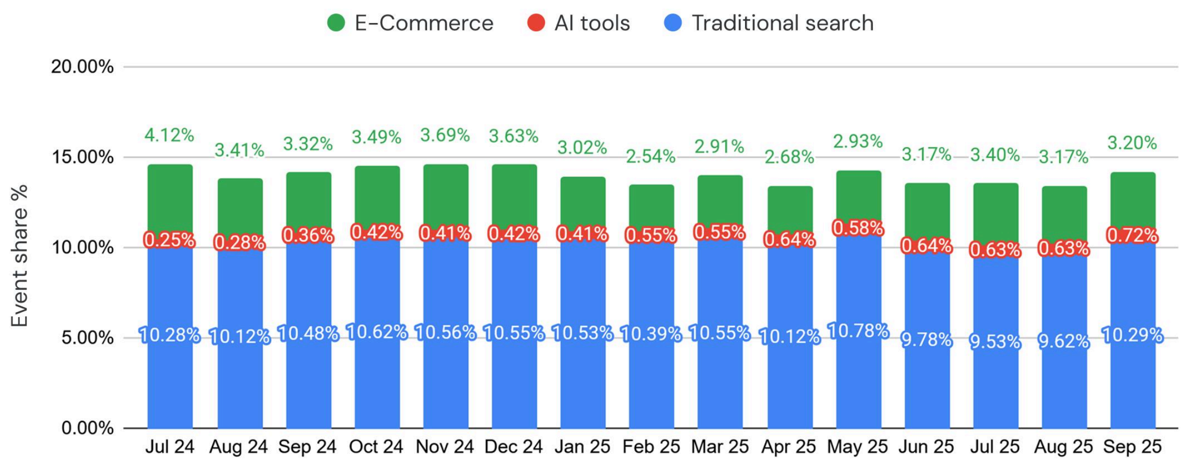
This report draws on user behavior clickstream data collected from Datos' large-scale panel of tens of millions of active desktop users globally. For the purpose of this study, we have analyzed behavior in the USA and Europe (EU and UK) from July 2024 to September 2025.

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 growth, 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%*

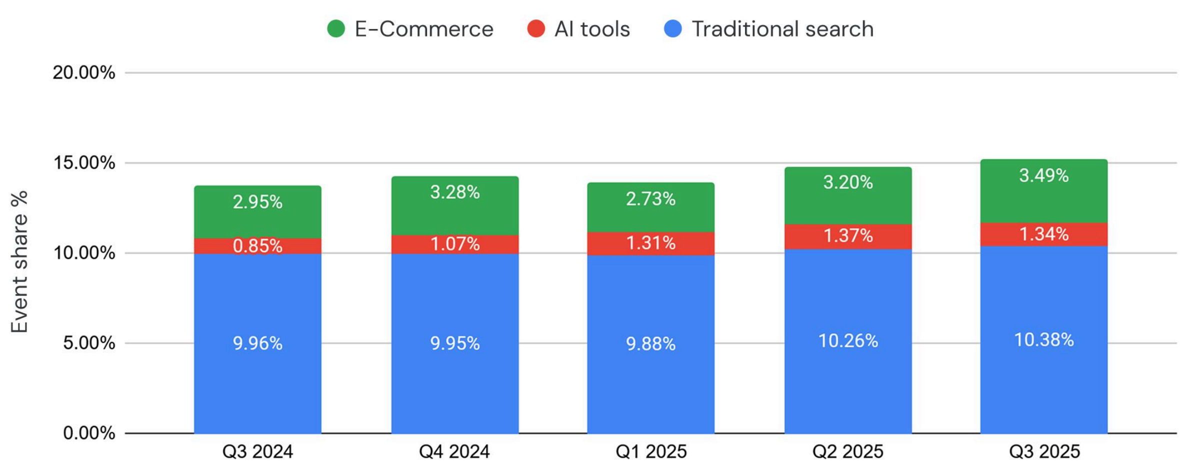
SparkToro *Source: Datos* Datos A Semrush Company

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The highpoint for BOTH traditional search engines and AI tools hitting in September 2025 is further confirmation that AI usage isn't cannibalizing Google/Bing/Yahoo/DuckDuckGo. I strongly suspect that in years ahead, we'll come to think of AI tool usage like social media – an entirely new category of its own.

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: Datos* Datos A Semrush Company

In the US, traditional search continues to dominate desktop activity, maintaining a steady share of about 10% of total events. Despite the rise of new discovery tools, it has proven resilient, with share edging up from 9.96% in Q3 2024 to 10.38% in Q3 2025.

Meanwhile, AI tools kept expanding, with their share of desktop events nearly tripling over the past year, rising from 0.24% in April 2024 to 0.72% by September 2025. Growth has been steady but appears to be stabilizing around the 1.3% mark, hinting that AI tool adoption is maturing after an initial surge of experimentation.

E-commerce activity remained broadly stable (about 3%), dipping slightly early in the year, then picking up again by late summer, climbing from 2.73% in Q1 to 3.49% in Q3, marking the strongest quarterly performance of the year so far.

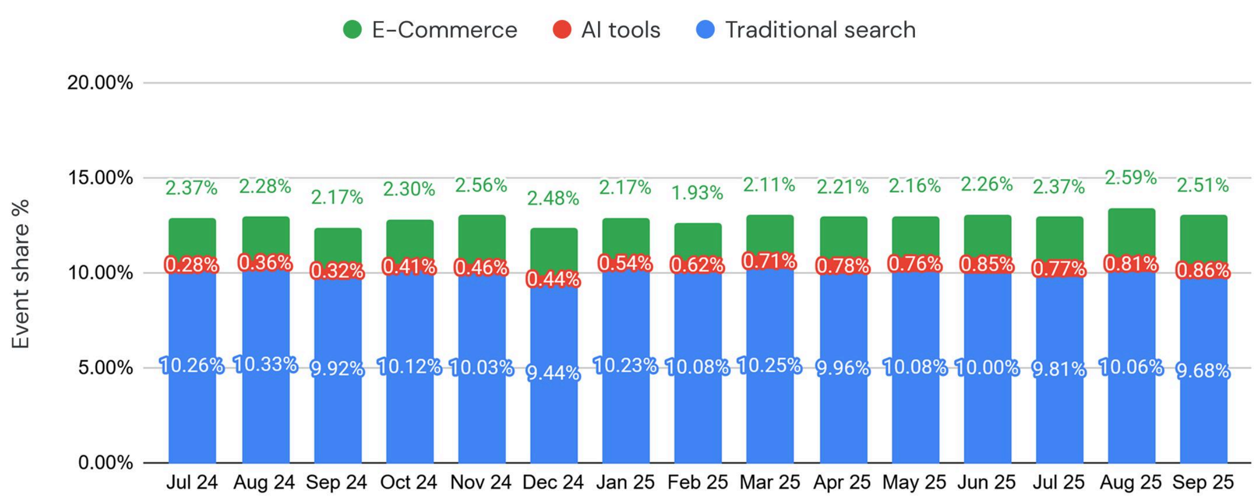
Overall, AI and e-commerce together now account for nearly 5% of tracked platform visits, indicating gradual diversification in desktop browsing beyond traditional search.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Q3 is often a quieter time in search and e-commerce (due to the summer holidays), but 2025 seems to be bucking that trend. Changes to school holiday schedules may be impacting that, but American cultural expectations around "always-on" work are probably playing a role here, too. Either that, or the rest of the web was less visited than usual, hence the rising share of these platforms (perhaps an omen of the Zero Click Internet we've theorized about).

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



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Source: Datos

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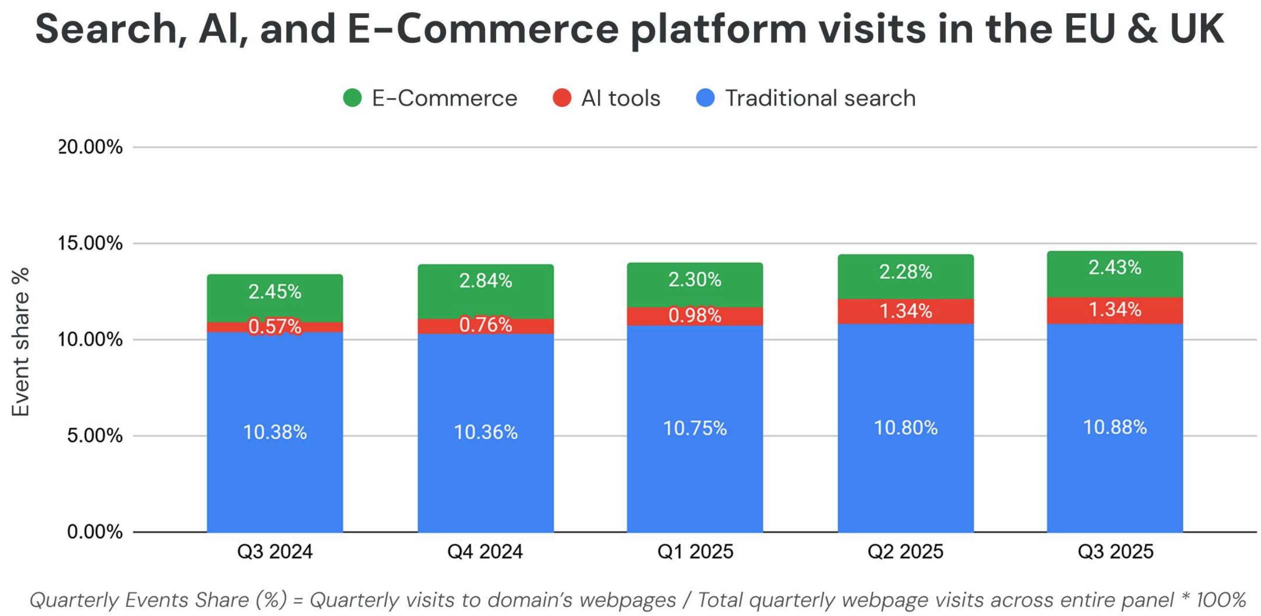


Source: Datos

In Europe, traditional search maintained a strong lead, with share holding fairly steady from 10.38% to 10.88% Q2 to Q3 this year, a slightly higher share than in the US, but growing at a similar pace. This consistency shows that search engines remain central to how users navigate and find information online.

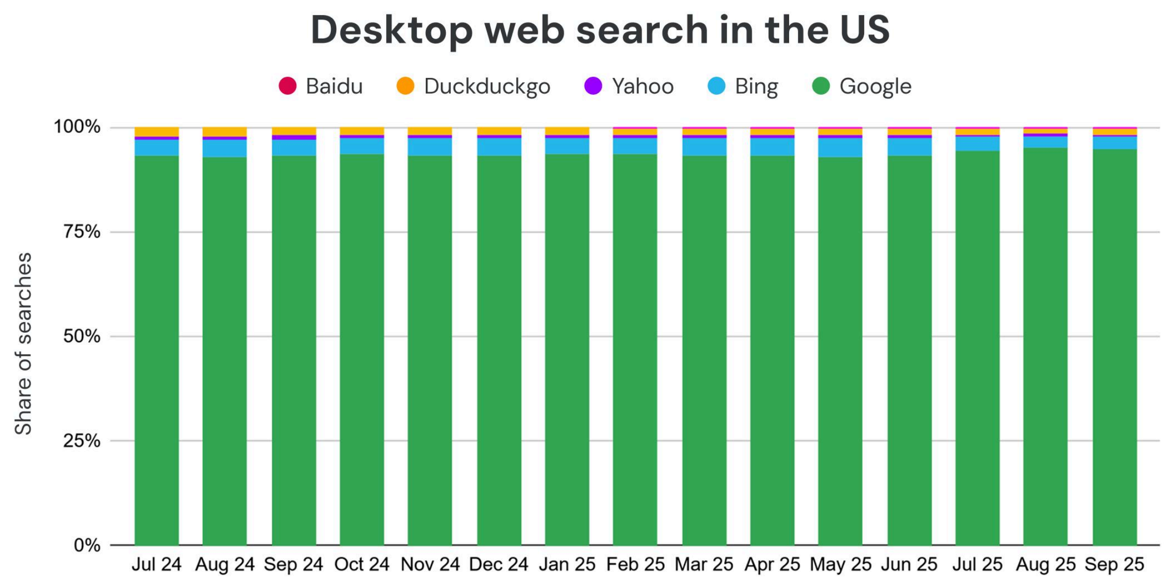
AI tool usage rose sharply over the past year – from 0.57% to 1.34% – marking faster growth than in the US.

E-commerce traffic stayed stable, fluctuating narrowly between 2.3% and 2.8%, reflecting stable consumer engagement across quarters.

Overall, the region shows a balanced mix of activity: AI continued to grow, search expanded modestly, and e-commerce held steady, reflecting a digital ecosystem that's evolving without major disruption.

State of traditional search

How the top 5 biggest "traditional" (non-AI) search engines have been faring from Q3 2024 to Q3 2025.



*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%*

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Source: Datos

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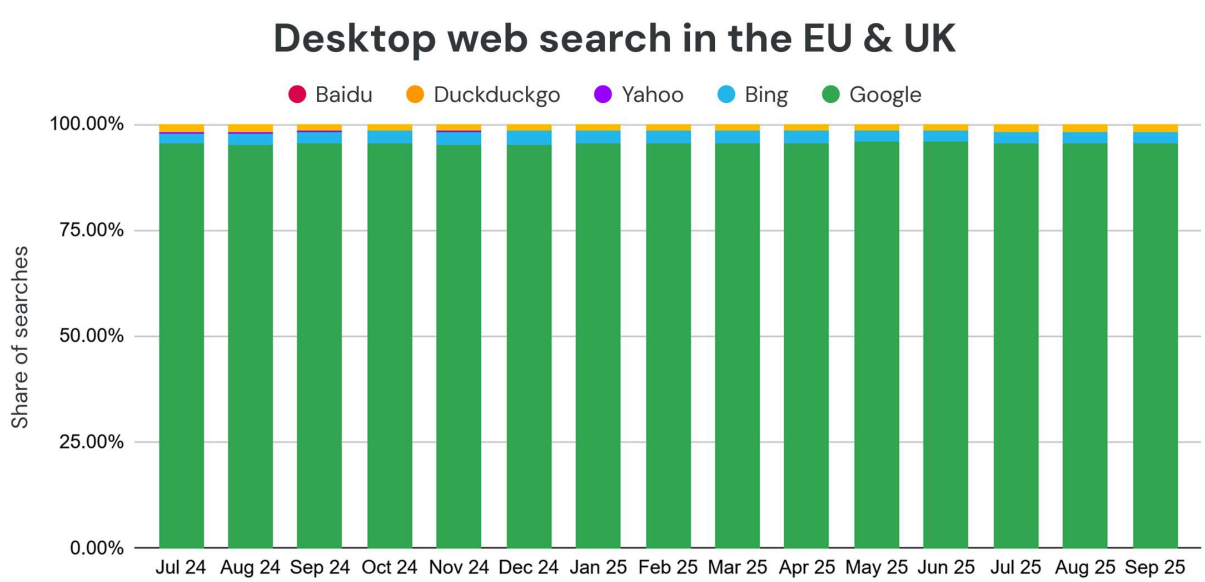
Traditional search remains a remarkably stable landscape in the US, with Google maintaining near-total dominance. Throughout Q3 2025, the platform accounted for roughly 95% of all desktop queries, showing virtually no movement from the previous quarter.

Bing continues to hold its position as the clear but distant second, followed by Yahoo, both maintaining steady shares without notable fluctuation. Meanwhile, DuckDuckGo and Baidu remain niche players, with consistently low visibility across the desktop search market.



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Source: Datos

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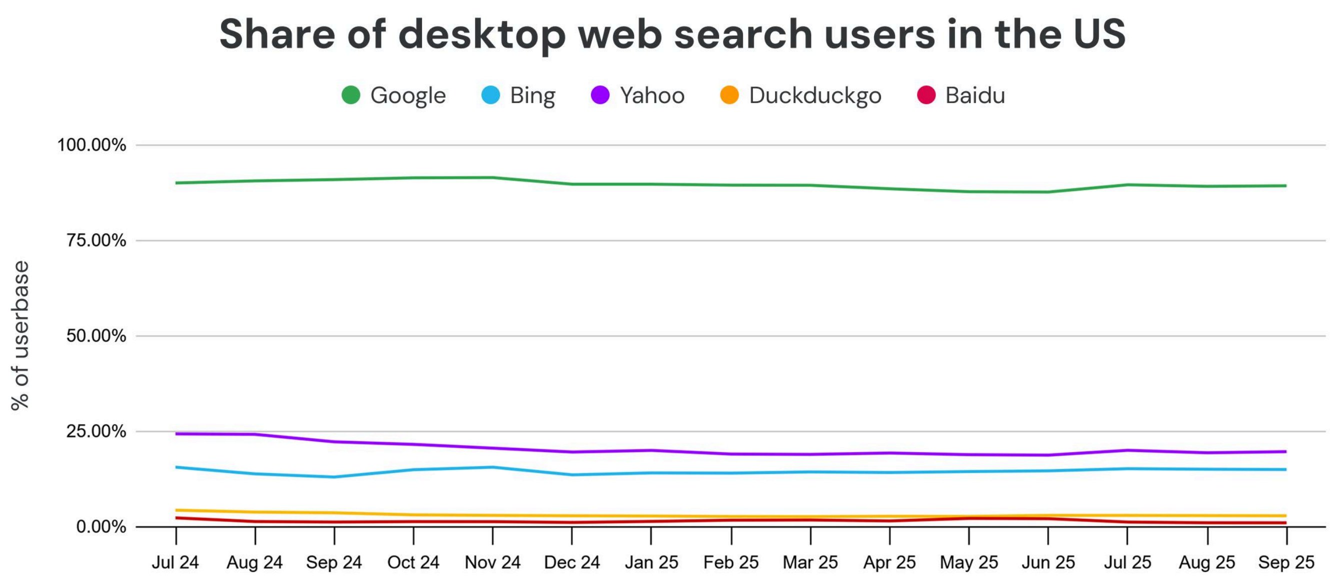
In the EU and UK, the traditional search landscape remains nearly identical to that of the US, with Google maintaining a dominant 95% market share and showing no meaningful change over the past two quarters.

Bing continues to hold second place, while Yahoo performs slightly better than in the US, sustaining a small but steady user base. DuckDuckGo and Baidu account for only a minimal share of searches, with no notable changes.



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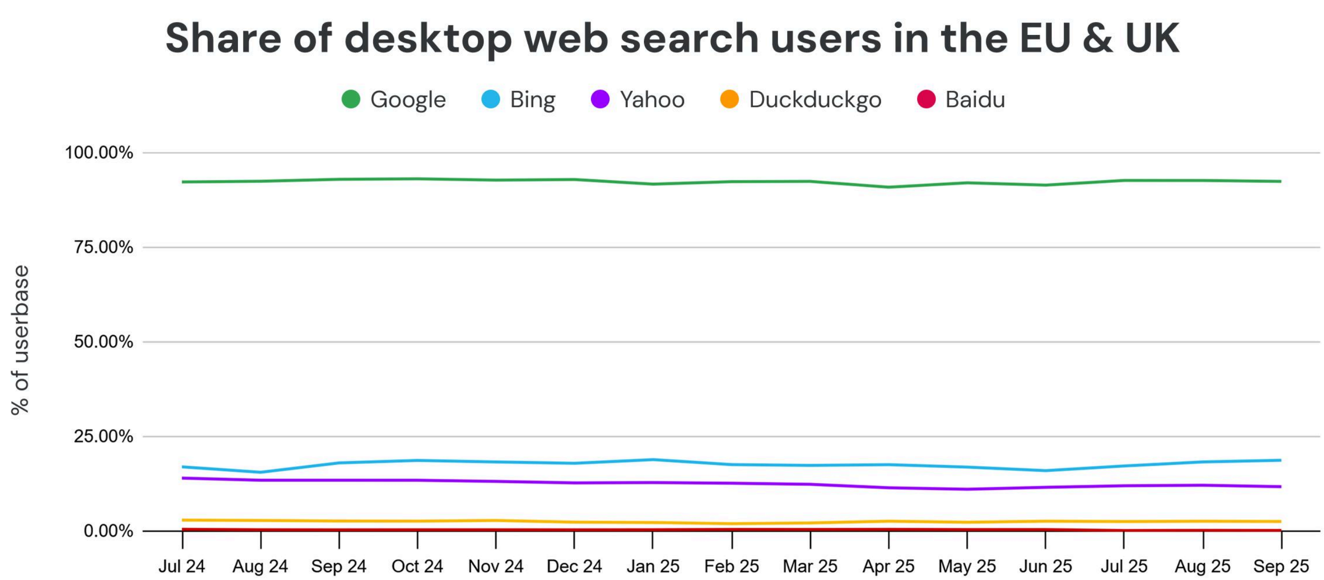
SparkToro *Source: Datos* Datos A Semrush Company



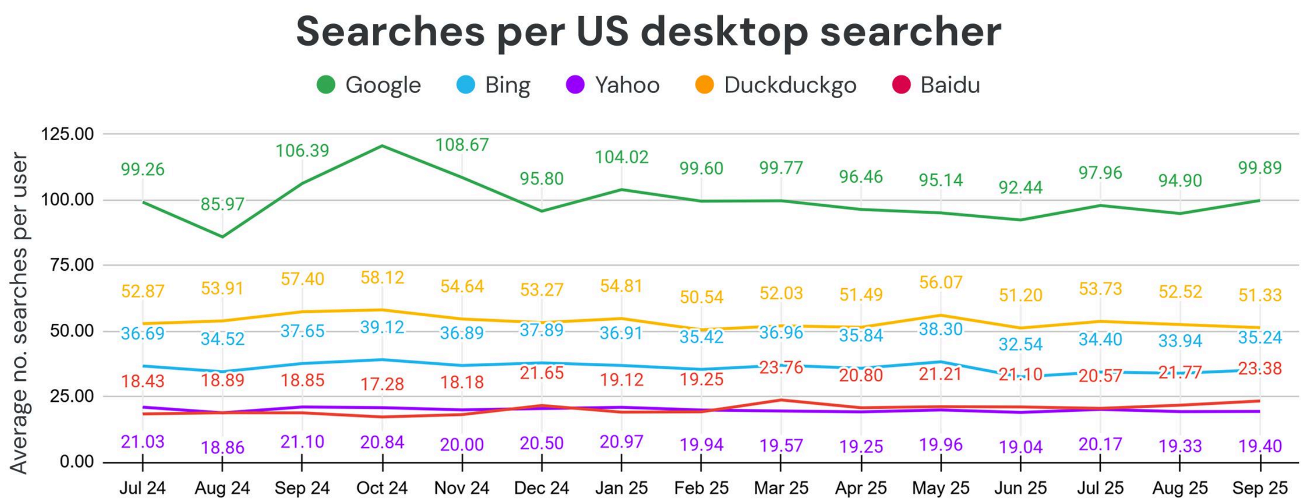
*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro *Source: Datos* Datos A Semrush Company

Across both regions, traditional search usage remains steady, with Google sustaining its overwhelming dominance, holding around 93–95% of desktop search users throughout the year.

Bing and Yahoo hold small, steady, single-digit shares in both regions, while DuckDuckGo and Baidu continue to account for only minimal shares.

Overall, the data highlights a highly stable and mature search landscape, where user behavior shows little deviation despite the rise of AI-driven alternatives. Desktop search remains a deeply entrenched habit across markets.



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 who performed at least one search on a given domain

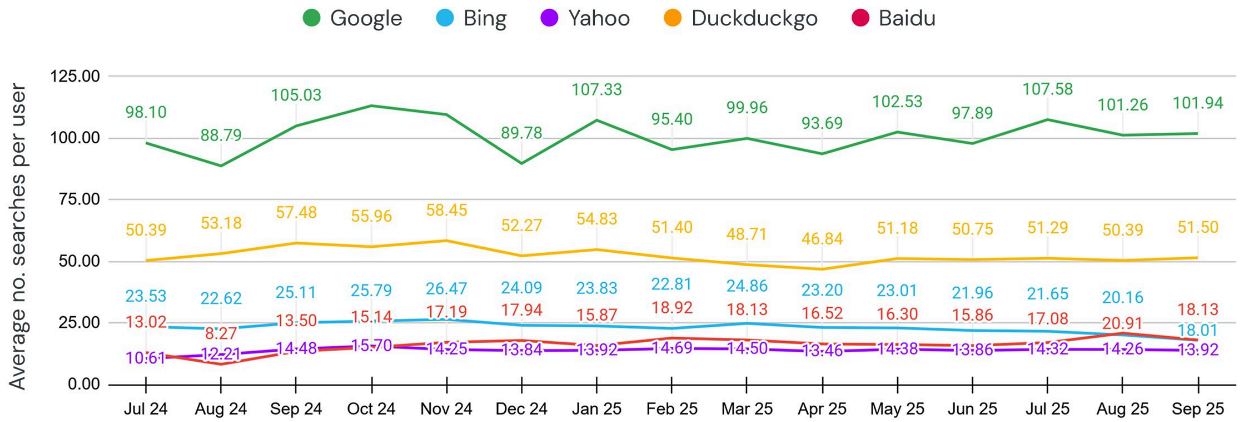
Source: Datos

Across Q3 2025, Google users averaged 90–100 searches per month, showing the same cyclical mid-year dip and late-summer rebound seen in previous periods. This pattern points to seasonal rather than structural change in user activity.

DuckDuckGo users remain the second most active on a per-searcher basis, averaging roughly 50–55 searches per month, demonstrating strong engagement within its smaller audience.

Meanwhile, Bing, Yahoo, and Baidu all show stable but lower search intensity, with averages largely unchanged quarter to quarter.

Searches per EU & UK desktop searcher



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 who performed at least one search on a given domain

Source: Datos

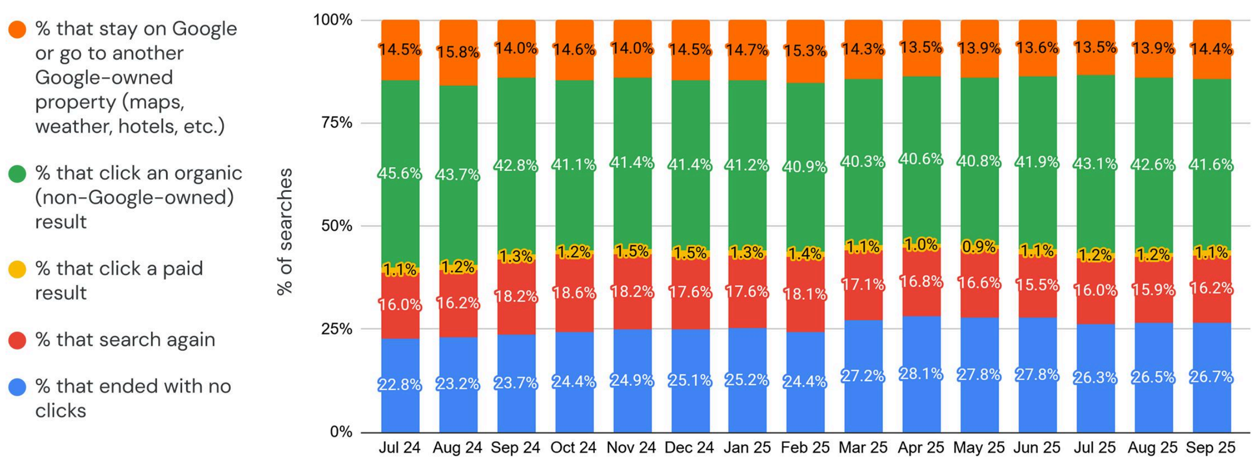
Search intensity in the EU and UK mirrors US trends, with Google showing clear seasonal variation between roughly 90–110 searches per user, dipping mid-year, and rebounding toward autumn.

DuckDuckGo again demonstrates the strongest per-user engagement among smaller search engines, maintaining around 50–55 searches per month, while Bing, Yahoo, and Baidu hold steady at lower levels.

Overall, the number of searches per user across all search engines remains stable, indicating consistent search behavior rather than major shifts in engagement patterns.

Next, we examined post-search user behavior on Google to understand where traffic flows after a query.

Distribution of Google US desktop search clicks over time



Source: Datos

Stateside, organic results remain the primary outcome of Google searches, though their share has edged slightly lower.

Searches that ended without a click saw an increase to almost 27%, dipping slightly compared to earlier in the year but showing a 3% growth since Q3 2024.

Traffic circulating within Google's own ecosystem (such as Maps, YouTube, and other owned properties) has stayed consistent at 14–15%.

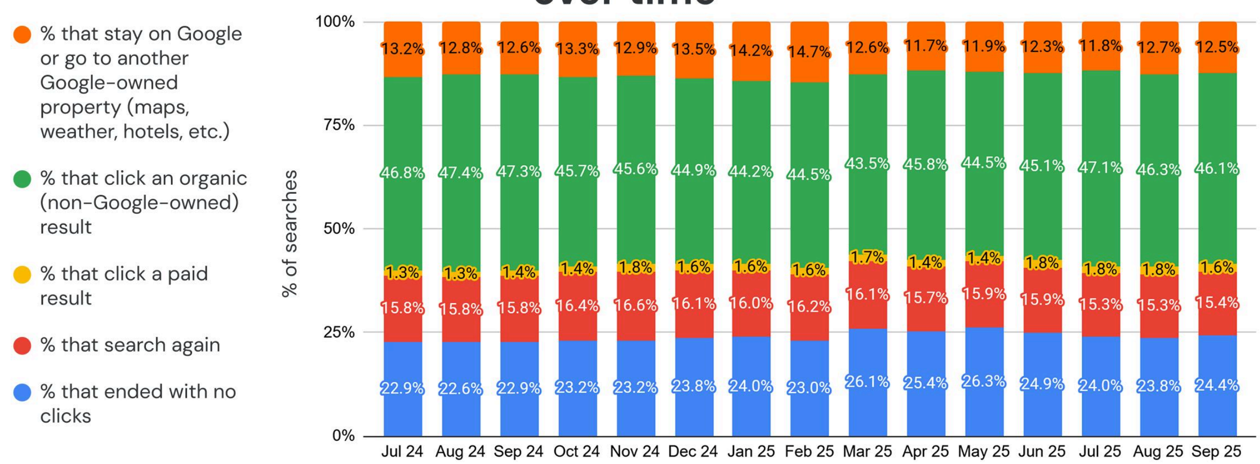
Overall, post-search behavior points to a gradual shift toward on-platform interactions rather than any abrupt change in user habits.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

March-May of 2025 had the lowest-ever percent of Google searches sending external traffic. While it's risen since then, we're still within a couple percentage points of that historic low, and the new "normal," promises to stay in the low 40s for percent of desktop searches that send traffic to anyone but Google themselves. Hopefully, a lot more marketers are thinking about how to influence people directly in the search results; if 50%+ of your search marketing efforts are still going to traffic-generation > Zero Click marketing, you should probably have a tough conversation with your boss, team, or client.

Distribution of Google EU & UK desktop search clicks over time



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Rand's Take

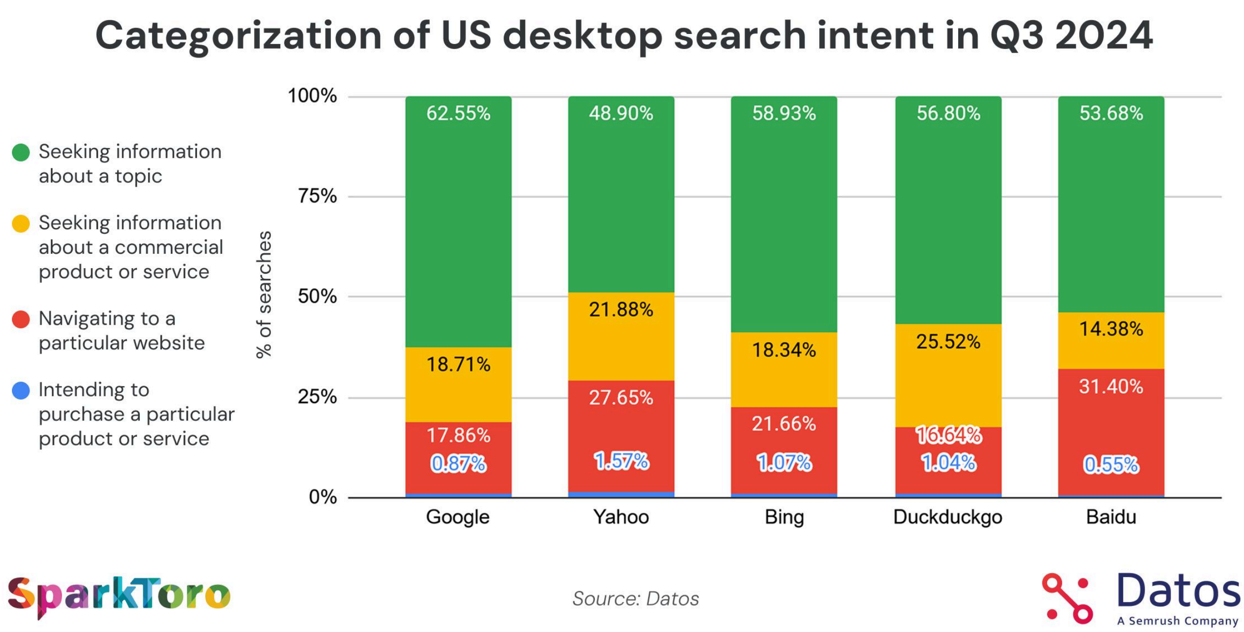
Rand Fishkin
SparkToro Co-founder & CEO

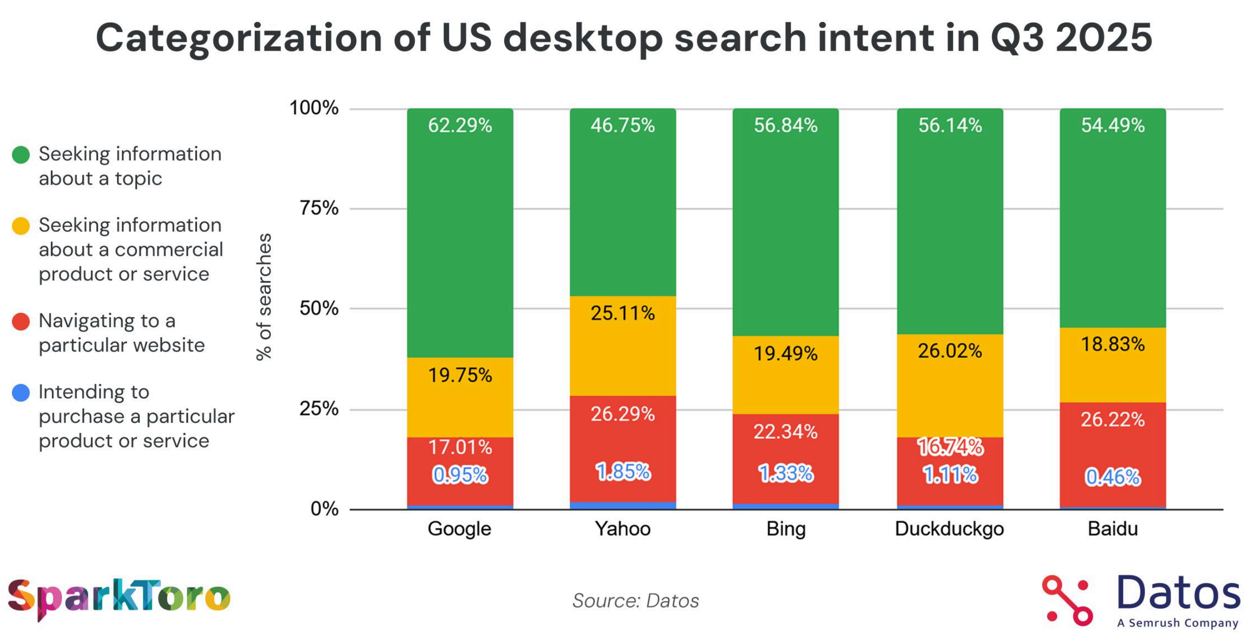
The EU & UK may not look dramatically different from the US in the graphs, but 48% of searches leading to clicks vs. 42% is fairly substantial – it adds up to billions of additional search-driven visits each month.

Over in Europe, organic click-throughs gained slightly through Q3, rising from 45% in June to 46% in September, suggesting stable external engagement.

At the same time, zero-click, repeat-search, and Google-owned property shares each declined slightly over the same period suggesting a shift towards paid and organic search results

Overall, search behavior remains largely consistent, with users in Europe and the UK continuing to click through to external content slightly more often than their US counterparts.Seeing what searchers did after searching on Google, we were able to categorize their search intent by using our algorithm, powered by our vector embeddings.



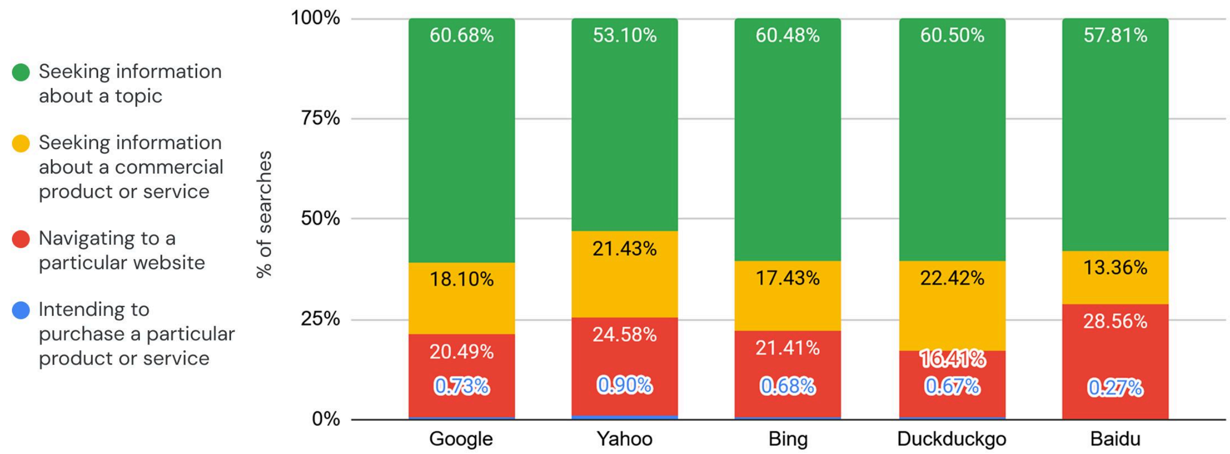


Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

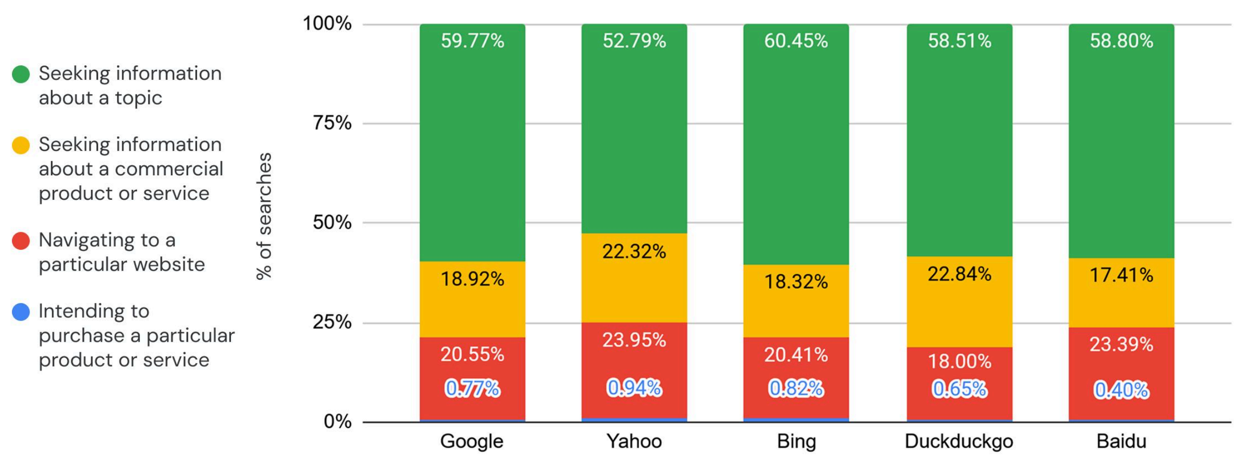
I'm personally surprised to see fewer (US) Google searches with navigational intent! Two possible theories: 1) Google's redirecting more of these desktop, nav-intent searches via the browser window before they ever hit the search results (via auto-suggest) or 2) Google's AI Overviews, answers, and AI mode are attracting more informational and product research queries (which, once again, speaks to the importance of having a Zero Click Marketing search strategy).

Categorization of EU & UK desktop search intent in Q3 2024



Source: Datos

Categorization of EU & UK desktop search intent in Q3 2025



Source: Datos

Informational intent continues to dominate desktop searches across all major search engines and regions, holding steady at around 60% of total activity. This underscores search's enduring role in information discovery, even as other platforms compete for user attention.

Commercial and product-related intent rose modestly year over year in both the US and Europe, reflecting users' growing comfort with researching and purchasing online.

Meanwhile, navigational intent (searches aimed at reaching specific websites) varies slightly across search engines and regions, suggesting persistent differences in how users treat search: as either a starting point for exploration or a direct route to known destinations.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I've got a theory that because Google's instant answers and AI Overviews tend to be more robust and aggressive in English than other European languages, US Google searchers are starting to ask more complex questions and do more of their research (of all kinds) in the search results vs. clicking to other sites. Probably a portent for what will come to other regions in the future.

Top US search destination domains Q3 2024 - Q3 2025

The tables below show the top 15 external domains visited from search engines in Q3 2024 and Q3 2025 for US desktop users. The ranking was established relative to the total visits to the top 15 domains.

(Note: external domains excludes for example when Google sends a visitor to Maps.Google.com or Google.com/Travel.)

Top domains visited from US desktop traditional search engines

Rank	Q3 2024	Q3 2025
1	Youtube	Youtube
2	Reddit	Reddit
3	Amazon	Amazon
4	Wikipedia	Wikipedia
5	Facebook	Facebook
6	Instagram	Instagram
7	Microsoft	Fandom
8	Fandom	Tiktok
9	Linkedin	Chatgpt
10	Tiktok	Microsoft
11	Quora	Linkedin
12	X	Ebay
13	Steampowered	X
14	Ebay	Walmart
15	Imdb	Steampowered

Source: Datos

Core platforms hold firm

- YouTube, Reddit, Amazon, Wikipedia, and Facebook remained the top five destinations from search, unchanged year over year.
- Their stability underscores the persistent dominance of large, multi-purpose platforms in driving desktop search traffic and highlights users' continued reliance on established ecosystems for media, community, and commerce.

AI finds its place

- ChatGPT appeared at #9, reinforcing its sustained relevance as a regular search destination.
- AI platforms have carved out a stable role in user journeys, though growth has leveled off, suggesting normalization rather than novelty: AI is now a routine stop, not a trend.

E-commerce broadens out

- Walmart entered the top 15 for the first time, joining Amazon and eBay. This reflects greater diversification in online shopper search behavior.

Entertainment patterns shift

- TikTok maintained its #8 position, highlighting continued dominance of short-form and social discovery content.
- Quora and IMDb exited the top 15, suggesting declining visibility for traditional reference and Q&A sites.
- The trend points to a broader user preference for short-form, community-led engagement over static information formats.

Top European search destination domains Q3 2024 - Q3 2025

The tables below show the top 15 domains visited from search engines in Q3 2024 and Q3 2025 for European desktop users. The ranking was established relative to the total visits to the top 15 domains.

Top domains visited from EU & UK desktop traditional search engines

Q3 2024

1	Youtube
2	Wikipedia
3	Reddit
4	Facebook
5	Amazon
6	Instagram
7	Microsoft
8	Fandom
9	Steampowered
10	Tiktok
11	Linkedin
12	Chatgpt
13	Github
14	X
15	Ebay

Q3 2025

1	Youtube
2	Reddit
3	Wikipedia
4	Facebook
5	Amazon
6	Instagram
7	Chatgpt
8	Microsoft
9	Tiktok
10	Steampowered
11	Fandom
12	Linkedin
13	Ebay
14	Github
15	X

Source: Datos

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While the US search landscape showed strong continuity, Europe and the UK mirrored this overall stability with only minor shifts among leading domains.

Core platforms stay on top

- YouTube, Reddit, Wikipedia, Facebook, and Amazon remained the five leading destinations.
- The relative order of these major platforms changed little, underscoring the continued dominance of established content, social, and commerce hubs.

AI strengthens its foothold

- ChatGPT climbed one position to #7, marking its firm integration into European users' search-driven journeys.
- The steady ascent highlights AI's consolidation and sustained interest, rather than a spike due to novelty.

Creative and technical platforms rebalance

- SteamPowered and GitHub held or improved their ranks, confirming durable engagement from gaming and developer communities.

- Fandom rebounded after its Q2 dip, suggesting resilience in niche content platforms.
- Meanwhile, Canva dropped out of the top 15, signaling a notable fall in search referrals from creative queries.

Social and shopping dynamics shift

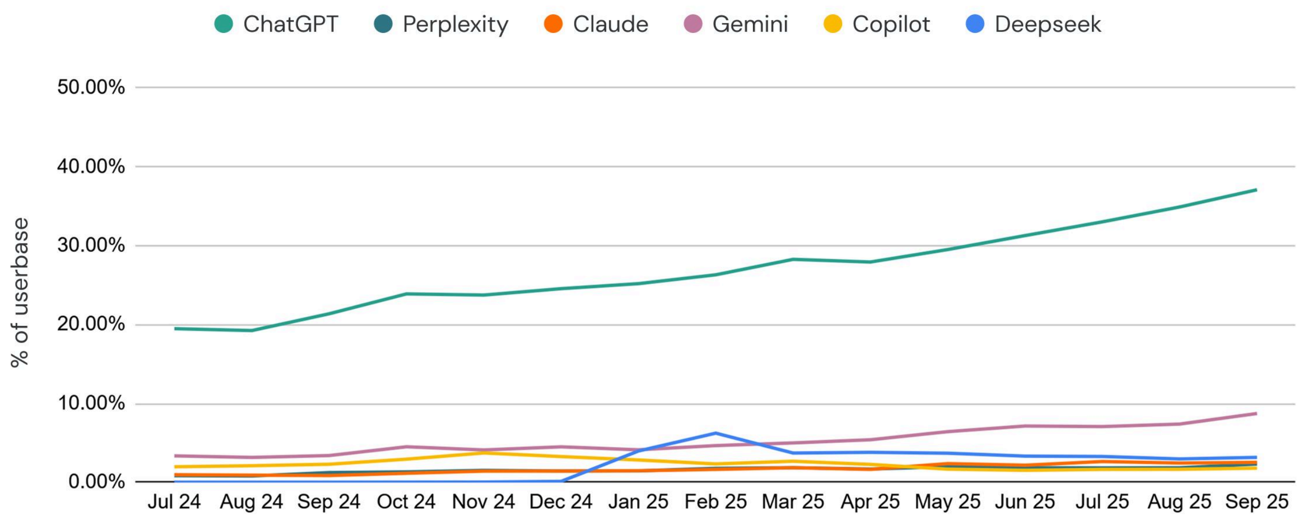
- Social media sites X and LinkedIn both slipped in rank.
- eBay reentered the top 15, adding weight to the e-commerce segment and hinting at renewed consumer activity across multiple marketplaces.
- The broader mix illustrates ongoing rotation among social and shopping platforms as user attention fragments across categories.

Key takeaways for traditional search

- **Traditional search remains the cornerstone**
  Even as AI tools gain traction, traditional search continues to anchor desktop browsing behavior. Its overall share has remained steady, with Google maintaining near-total dominance across both the US and Europe.
- **User engagement holds steady**
  Search activity per user shows seasonal variations but no sign of long-term decline. People continue to rely on traditional search as a consistent part of their online routines, underscoring its enduring role in digital discovery.
- **Zero-click behavior continues to grow**
  A growing share of searches now end without a click, reflecting how often users find answers directly on Google's results pages. At the same time, clicks within Google's own ecosystem have remained stable, signaling deeper on-platform engagement.
- **Intent patterns stay consistent, but commercial interest grows**
  Informational searches still make up the majority of queries, yet commercial and product-related intent continues to rise. This gradual shift points to traditional search's lasting importance in the consumer decision-making process.

State of AI search

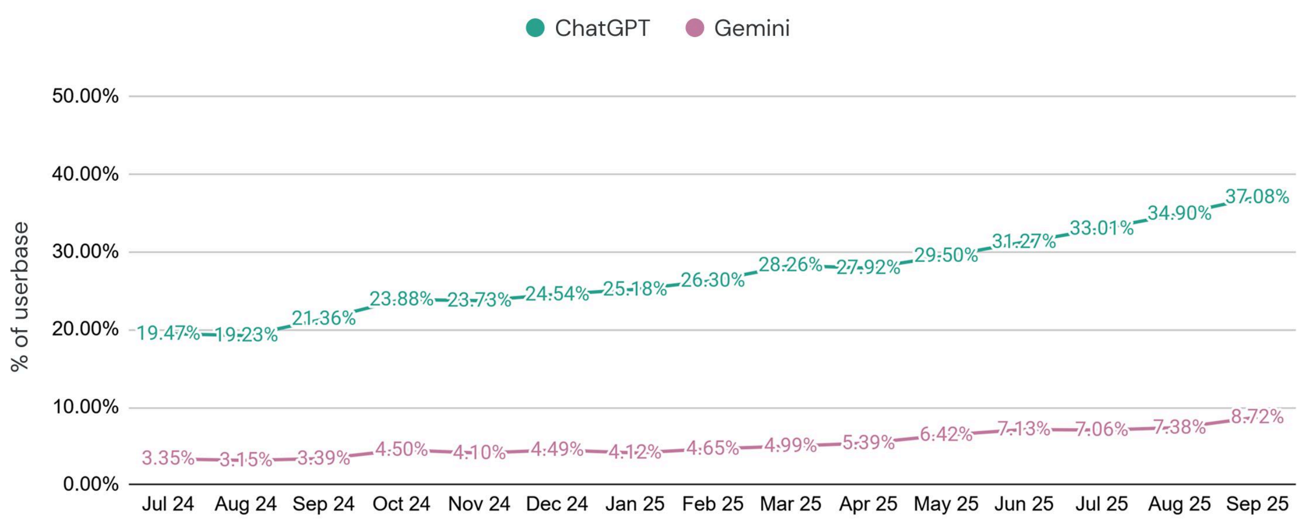
Share of desktop users using AI in the US



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

Source: Datos

Share of desktop users using AI in the US



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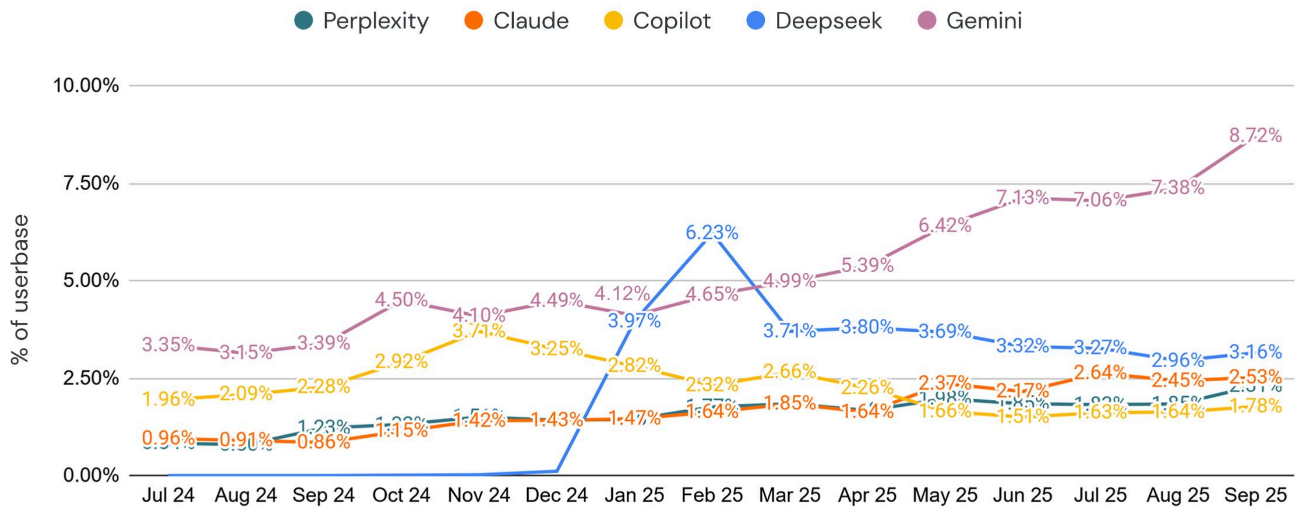
Share of desktop users using AI in the US



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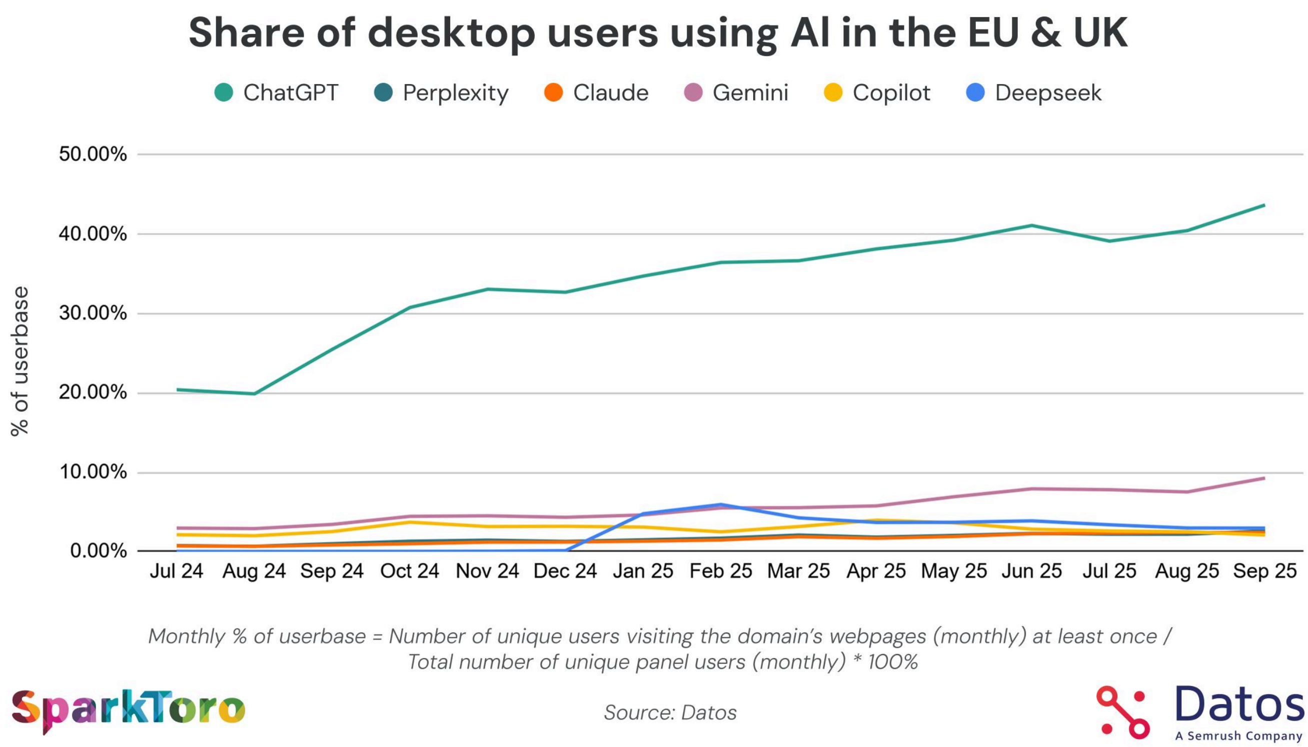
Share of desktop users using AI in the EU & UK
ChatGPT
Perplexity
Claude
Gemini
Copilot
Deepseek
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
% of userbase
Jul 24
Aug 24
Sep 24
Oct 24
Nov 24
Dec 24
Jan 25
Feb 25
Mar 25
Apr 25
May 25
Jun 25
Jul 25
Aug 25
Sep 25
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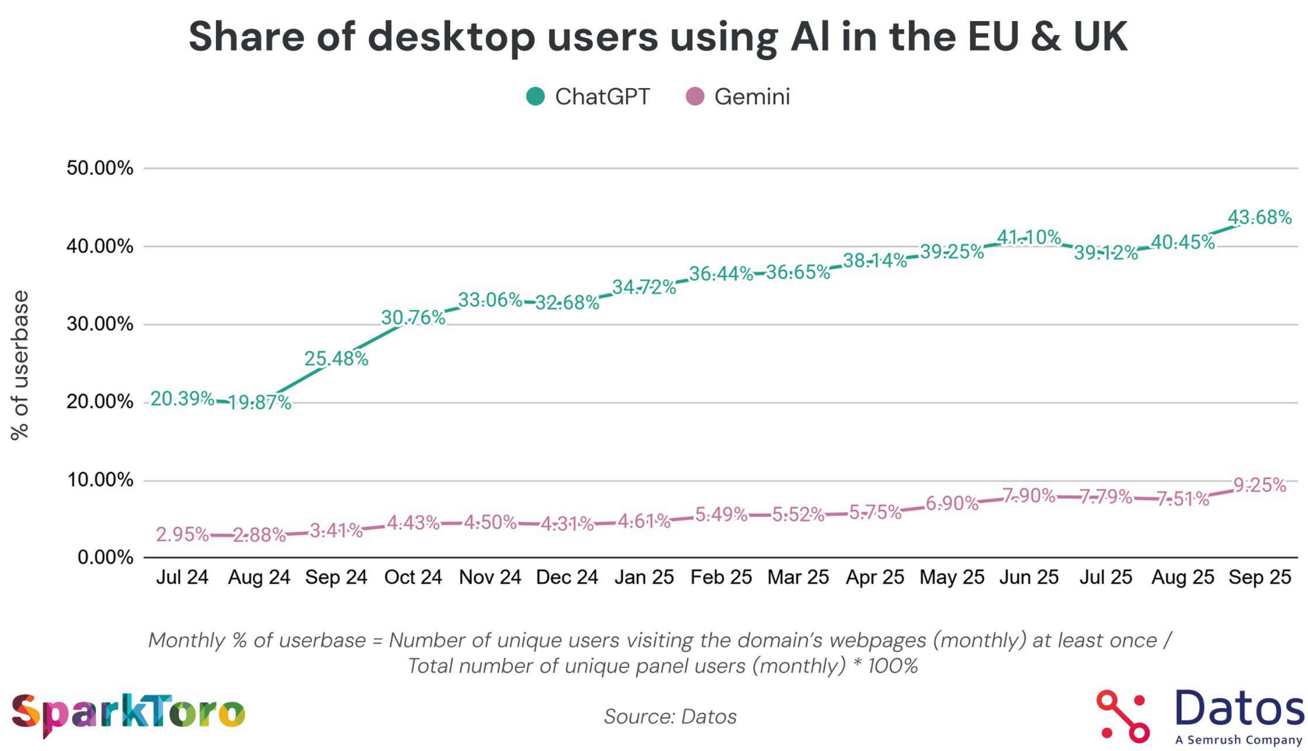
Share of desktop users using AI in the EU & UK
ChatGPT
Gemini
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
% of userbase
20.39%
19.87%
25.48%
30.76%
33.06%
32.68%
34.72%
36.44%
36.65%
38.14%
39.25%
41.10%
39.12%
40.45%
43.68%
2.95%
2.88%
3.41%
4.43%
4.50%
4.31%
4.61%
5.49%
5.52%
5.75%
6.90%
7.90%
7.79%
7.51%
9.25%
Jul 24
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Sep 24
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Nov 24
Dec 24
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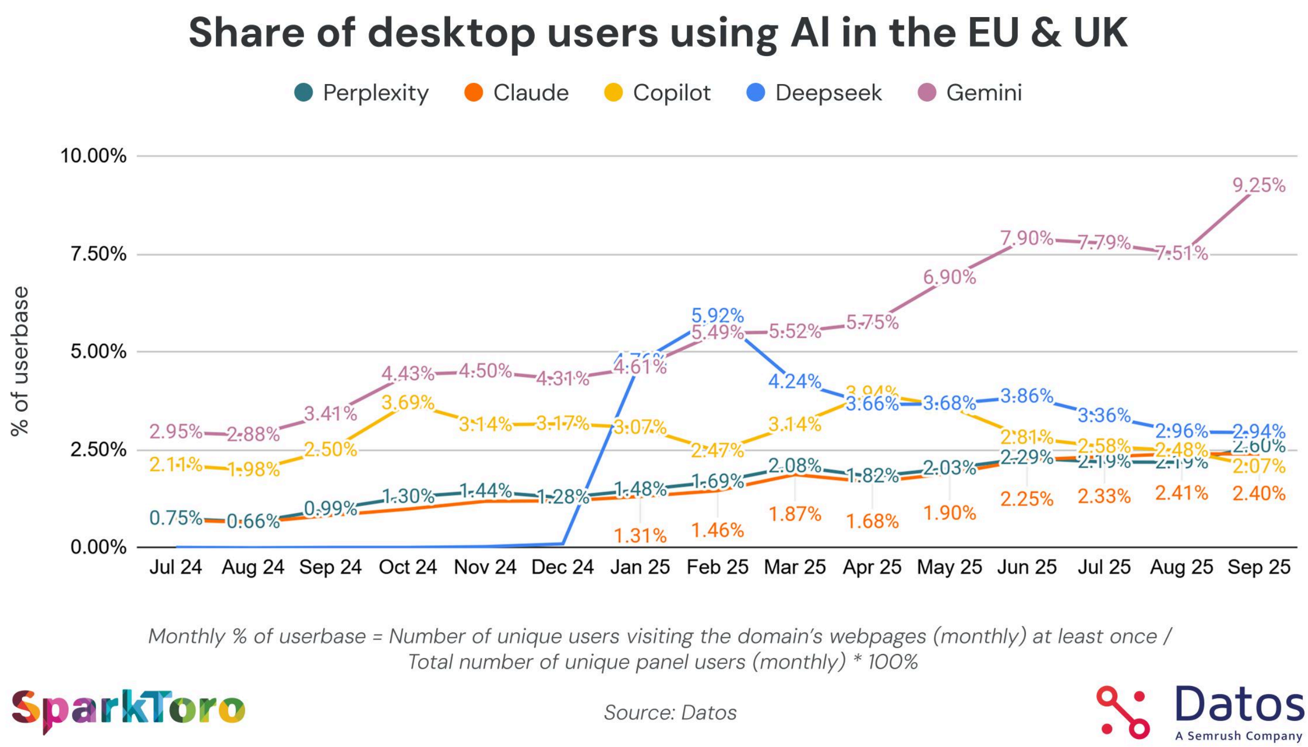

AI desktop tool usage trends (US vs. EU & UK)

Adoption and market penetration

- AI adoption continued its steady upward trajectory across both the US and Europe in Q3 2025, with Europe maintaining a slight lead.

Platform leadership and competitive landscape

- ChatGPT remained the clear leader, surpassing 30% of desktop users in the US and reaching over 40% in the EU and U.K.
- Gemini showed steady upward movement, especially in Europe, reflecting Google's strong ecosystem advantage and brand familiarity.
- Other tools such as Perplexity, Claude, and Copilot sustained modest but stable user bases, typically around 2%, serving specialized or loyal user segments.

Regional behavior and engagement patterns

- European users exhibit slightly higher overall engagement, with a faster adoption curve and broader experimentation across multiple AI tools.
- US adoption, while initially slower, shows accelerating momentum through mid-to-late 2025, narrowing the regional gap.
- Usage behavior converged over time, with both markets reflecting the same hierarchy of dominant tools and gradual normalization of AI as part of daily search and productivity habits.

Top US AI destination domains Q3 2024 - Q3 2025

Top domains visited from US desktop AI tools

Q3 2024

1	Google	9	Bing
2	Youtube	10	Grammarly
3	Github	11	Wikipedia
4	Amazon	12	Canva
5	Microsoft	13	Chatgpt
6	Linkedin	14	Nih
7	Reddit	15	Yahoo
8	Facebook		

Q3 2025

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2	Youtube	10	Linkedin
3	Github	11	Nih
4	Amazon	12	Gemini
5	Reddit	13	Bing
6	Chatgpt	14	Canva
7	Wikipedia	15	Baidu
8	Facebook		

Source: Datos

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Core platforms dominate

- Platforms like Google, YouTube, GitHub, Amazon, Microsoft, and Wikipedia remained the main destinations for AI-assisted browsing.
- Their positions reflect users' reliance on AI tools for coding, productivity, research, information lookup, and shopping-related tasks.

- The stability of these domains underscores how AI has been integrated into existing workflows rather than replacing traditional digital behaviors.

Experimentation among secondary gateways

- Several secondary tools and search engines Bing, Yahoo, Gemini, and DeepSeek (which appeared briefly in Q2) rotated in and out of visibility.
- This turnover signals ongoing experimentation as users explore alternative ways to access or complement AI-assisted experiences.
- None of these challengers have yet achieved sustained traction against dominant platforms.

Reference and research-oriented use grows

- Wikipedia and NIH.gov both maintained or strengthened their positions in the top destinations, confirming steady demand for fact-checked, research-based information.
- This trend suggests that AI-assisted search behavior increasingly points toward trusted, authoritative knowledge sources.

Professional and creative tools decline but persist

- Canva and LinkedIn both slipped in rank over the past year but continue to attract meaningful AI-driven traffic.
- Their presence highlights AI's ongoing influence in professional and creative workflows, even as attention consolidates around productivity and coding tools.

Communities stay central to AI traffic

- Reddit and Facebook remain strong destinations, reinforcing the role of community-driven knowledge and peer problem-solving in the AI era.
- In contrast, visual and trend-based platforms such as Instagram and X lag behind, showing that AI-originated traffic is more aligned with discussion, collaboration, and learning than with social sharing.

Top European AI destination domains Q3 2024 – Q3 2025

Top domains visited from EU & UK desktop AI tools

Q3 2024

1	Google
2	Youtube
3	Github
4	Facebook
5	Microsoft
6	Linkedin
7	Amazon
8	Whatsapp
9	Bing
10	Wikipedia
11	Canva
12	Chatgpt
13	Instagram
14	Reddit
15	Gemini

Q3 2025

1	Google
2	Youtube
3	Github
4	Amazon
5	Facebook
6	Reddit
7	Wikipedia
8	Microsoft
9	Chatgpt
10	Instagram
11	Linkedin
12	Whatsapp
13	Canva
14	Gemini
15	Nih

Source: Datos

Datos
A Semrush Company

Established platforms lead

- Google, YouTube, GitHub, Amazon, Microsoft, and Wikipedia remained the top AI-driven destinations across both years.
- Wikipedia's recurring rise in Q3 suggests seasonal academic and research-related spikes, reinforcing its enduring authority as a factual resource.
- These domains show that AI activity in Europe, much like in the US, centers around productivity, knowledge retrieval, and problem-solving.

Community integration expands

- Reddit rose dramatically since 2024, emerging as a key AI-linked destination in Europe.
- The shift reflects stronger integration of community dialogue and user-generated knowledge into AI-assisted workflows.
- This also signals Europe's faster cultural adoption of AI as a discovery and discussion aid.

Meta ecosystem retains a stronger foothold

- Unlike in the US, Instagram and WhatsApp both remained within the top destinations.
- Their continued presence points to Meta's broader cross-platform reach and deeper embedding in European daily communication habits.

AI tools reassert position

- ChatGPT regained ground; after falling to 13th place in Q2 2025 (below its 2024 level) , it returned to the top 10 by Q3 2025.
- The rebound likely reflects cross-tool user traffic, as users of other AI tools return to ChatGPT for reliability or complementary use cases.
- Its consistent reappearance shows continued strength despite intensifying competition from other AI tools.

Professional and creative tools stabilize

- LinkedIn and Canva declined compared with 2024 but have stabilized in the lower rankings.
- Their ongoing inclusion underscores steady use in design, marketing, and professional development, even as AI adoption consolidates around information and coding hubs.

Key Takeaways for AI search

- **Smaller tools show uneven but persistent adoption**
  While ChatGPT remains firmly on top, other AI platforms Gemini, Claude, Perplexity, and Copilot, maintained modest shares of around 2–3% of desktop users. Gemini showed the most consistent growth trajectory, while Claude and Perplexity stabilized at lower levels. Deepseek, which saw a strong early-2025 surge, declined sharply after Q2.

Europe leads in adoption, but the gap is closing

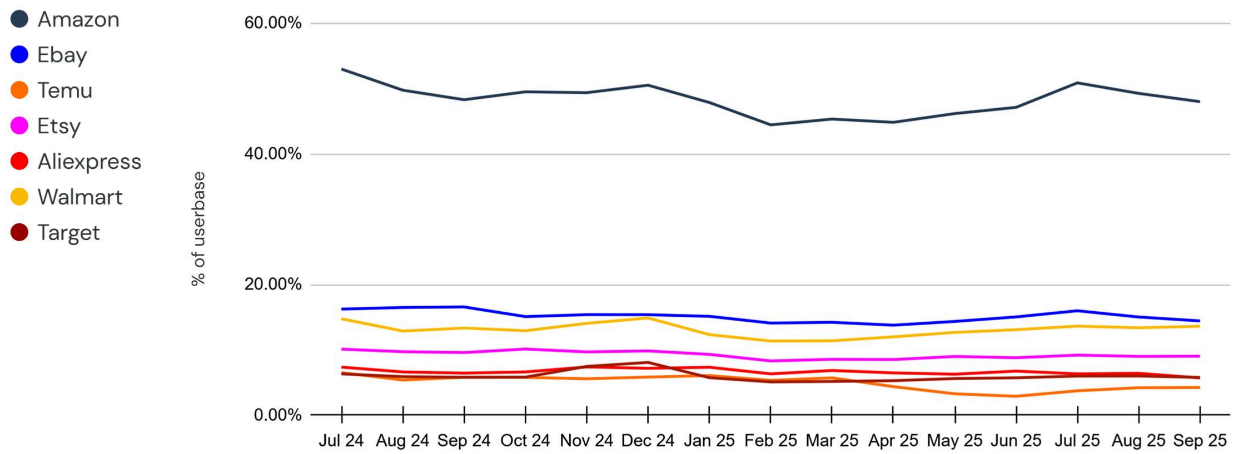
Europe continued to outpace the US in overall AI desktop tool usage, though the difference between the regions narrowed through mid-2025. Both regions now follow similar behavioral patterns with ChatGPT leading by a wide margin, Gemini continuing gradual growth, and smaller tools trucking along. This convergence signals a maturing market, where user habits and tool preferences are becoming globally consistent.

AI-driven browsing expands its use cases

AI activity is not confined to general Q&A or content creation. The top AI destination domains, including GitHub, Wikipedia, NIH.gov, and Amazon, illustrating how AI is increasingly being used for coding, research, shopping, and professional learning. In both the US and Europe, traffic patterns show users leveraging AI tools as starting points for task-specific exploration, suggesting that AI has become embedded in the broader ecosystem of discovery and decision-making online.

State of E-commerce

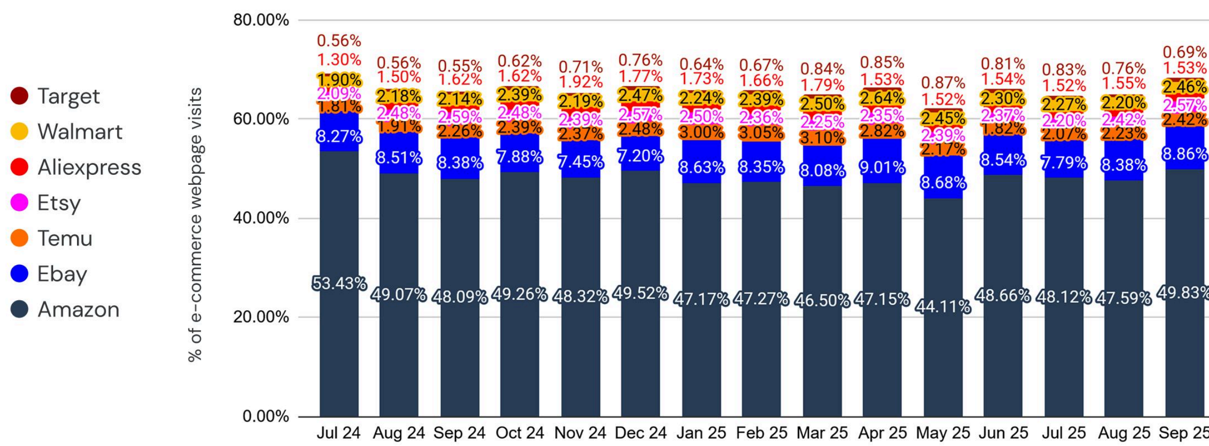
Share of desktop users on e-commerce websites in the US



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

Source: Datos

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%*

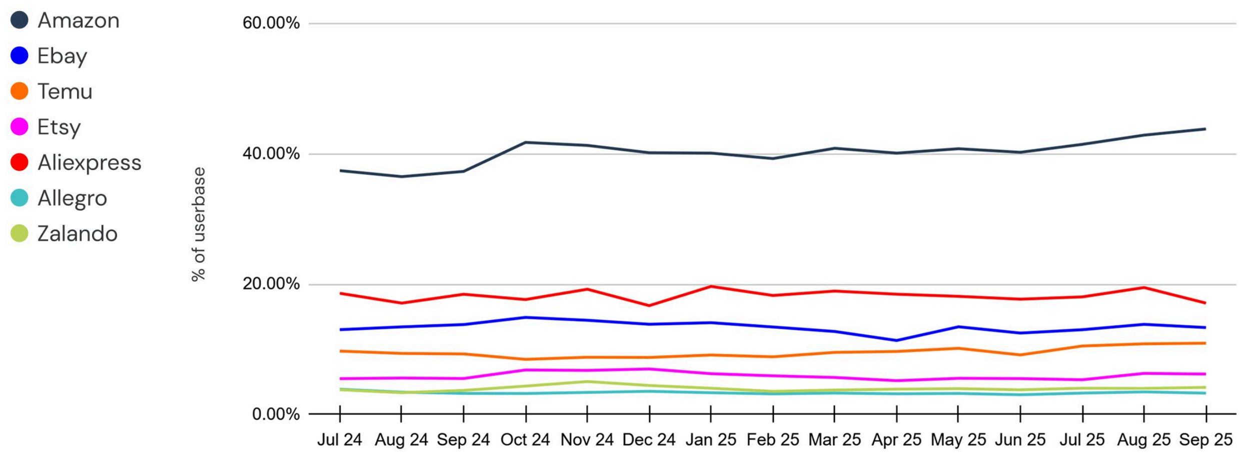
Source: Datos

Desktop e-commerce activity softened slightly in Q3 2025, continuing the gradual slowdown that began in mid-2024. Yet webpage visits rose, showing that while fewer users shopped via desktop, those who did were more engaged and intentional in their browsing.

Amazon remained the clear leader, accounting for nearly half of all desktop e-commerce visits by September. Its user share dipped mid-year but recovered through stronger on-site activity, reflecting loyal, high-value engagement.

The mid-year lull mirrored 2024's seasonal dip, likely due to reduced summer shopping and migration to mobile. Temu's growth plateaued, Walmart held steady thanks to its hybrid retail model, while eBay, Target, and Etsy declined in parallel, indicating a broad, sector-wide cooling rather than platform-specific losses.

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



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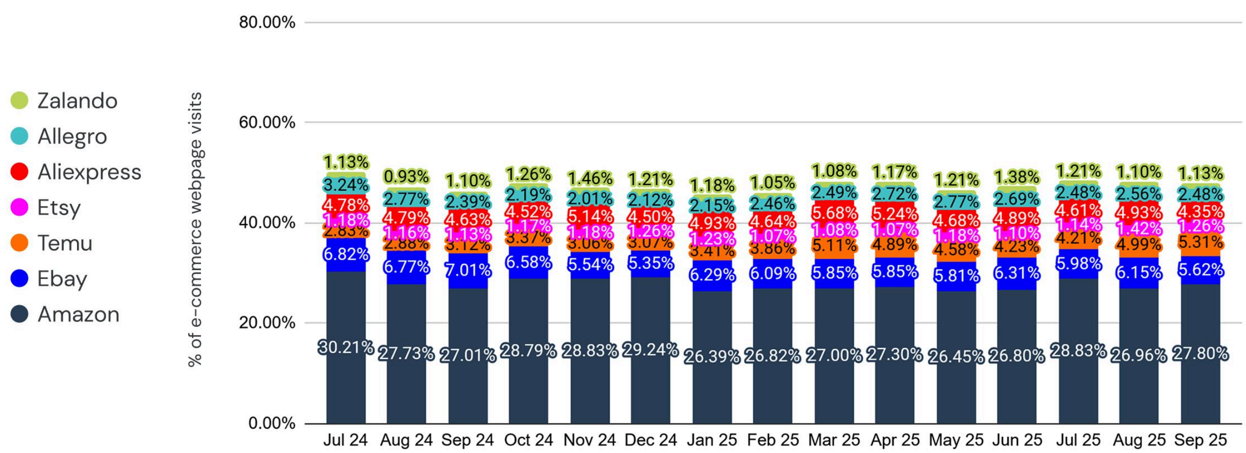
Source: Datos

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%*

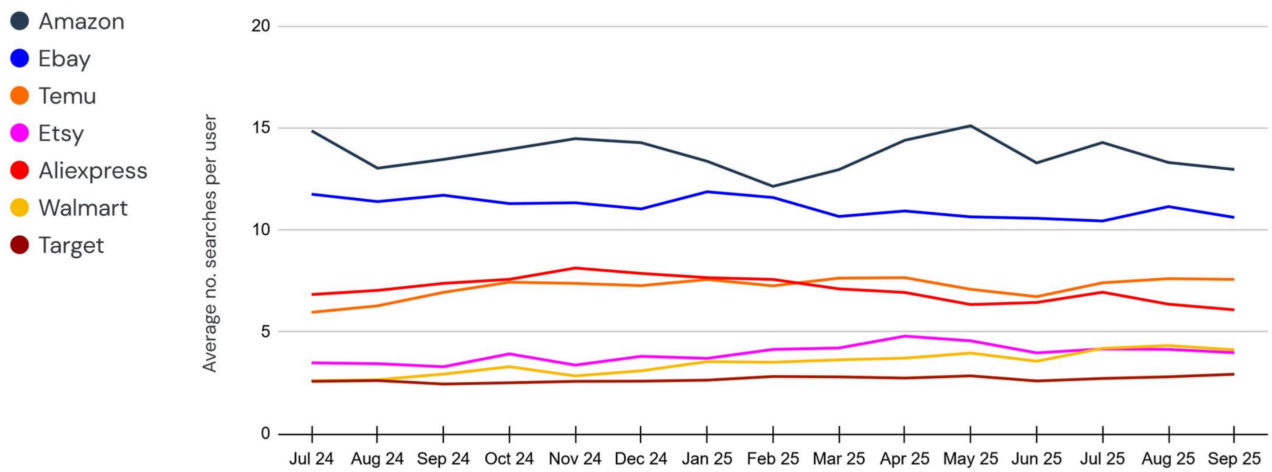
Source: Datos

In contrast to the US, desktop e-commerce in Europe and the UK grew modestly in Q3 2025, reversing last year's Q3 decline. More users visited online stores, though overall page visits per user dipped slightly.

Amazon continued to lead but with a smaller margin than in the US, capturing around 27% of webpage visits versus nearly 50% stateside. AliExpress maintained a strong second position, creating a more balanced competitive field and reflecting Europe's openness to global marketplaces.

Mid-tier platforms like Temu and eBay held steady between 10–15%, mirroring the US dynamic for Walmart and eBay. Regional brands such as Allegro and Zalando remained consistent, supported by loyal local audiences. Overall, European e-commerce shows steadier participation, less volatility, and a more evenly distributed market than the US

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 who performed at least one search on a given domain

SparkToro

Source: Datos

Datos
A Semrush Company

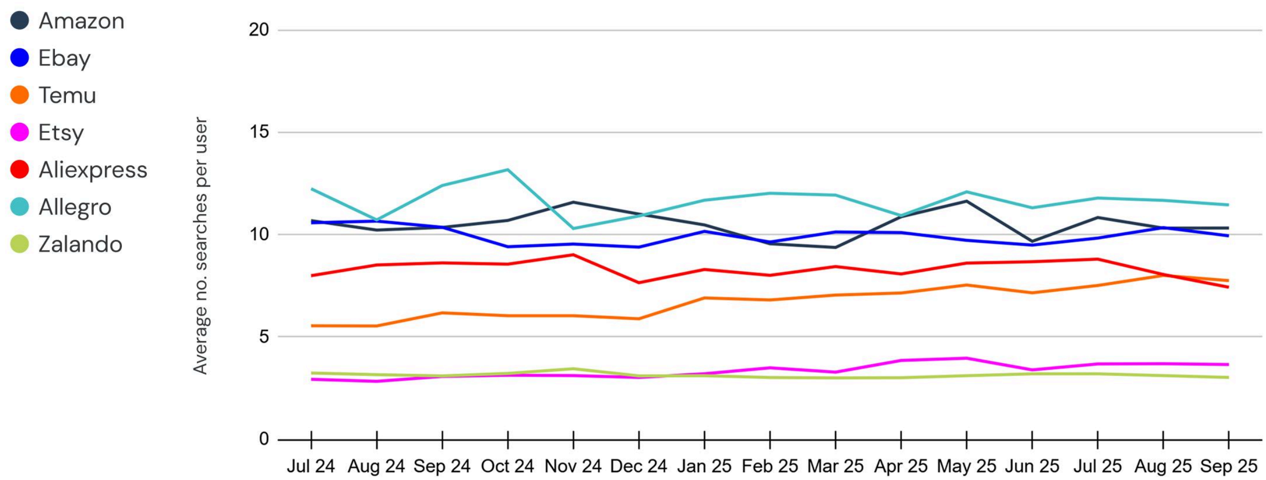
Engagement levels across U.S. e-commerce platforms showed clear stratification through Q3 2025. Amazon remained the leader in search activity, with eBay close behind, both being in the 10–15 searches range.

The second tier – Temu and AliExpress – maintained steady, parallel patterns with around 7 searches per user, suggesting consistent but moderate engagement. Both saw minor seasonal fluctuations.

Etsy, Walmart, and Target formed the lowest activity group, with around 2–4 searches per user. Among them, Walmart showed a gradual climb from 2.7 to over 4 searches by September, contrasting Target's flatter trajectory.

Compared to Q2, which saw stronger growth, Q3 reflected stability or mild decline. Search behavior became more routine, with fewer spikes and a return to habitual shopping patterns after earlier seasonal surges.

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 who performed at least one search on a given domain

Source: Datos

Search engagement across European and UK e-commerce platforms stayed steady through Q3 2025, showing consistent user habits rather than major shifts. Allegro led the region overall, maintaining between 10 and 13 searches per user and occasionally trading places with Amazon for the top spot. Both platforms demonstrate stable, high engagement levels.

Amazon and eBay continued to alternate in second and third positions. Temu stood out for its gradual climb from around 5 to 8 searches per user, overtaking AliExpress, which held steady at similar levels.

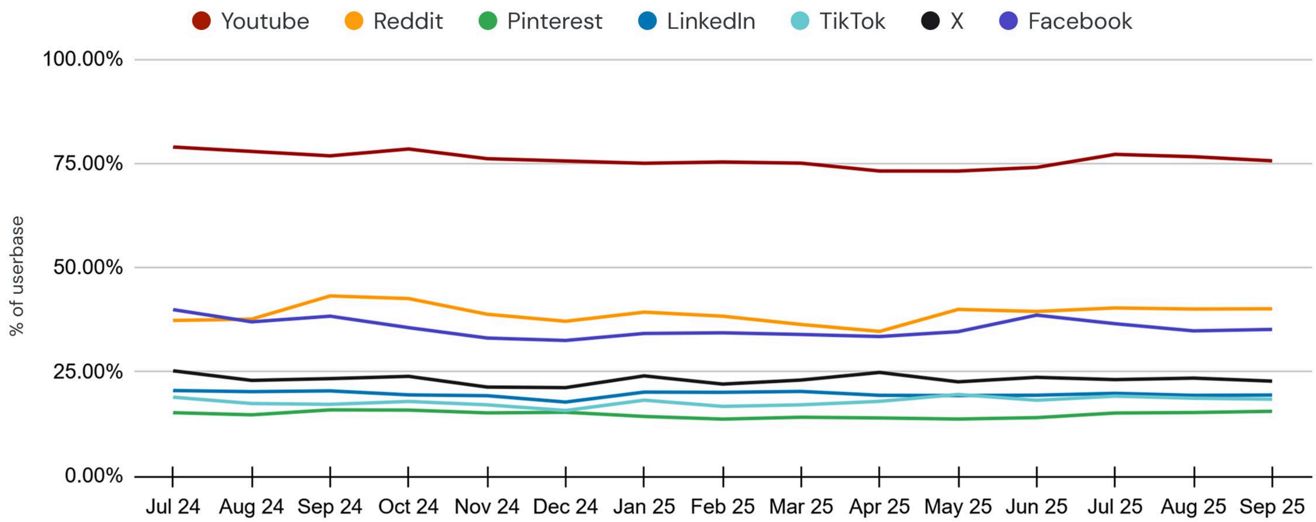
Etsy and Zalando remained at the lower end of activity, averaging 3–4 searches per user.

Overall, Q3 2025 marked a steady period for European e-commerce, with consistent engagement across platforms and little volatility.

Content platforms search

Finally, we took a look at the userbase share and average number of searches per desktop user on major content platforms.

Share of desktop users on content platforms 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

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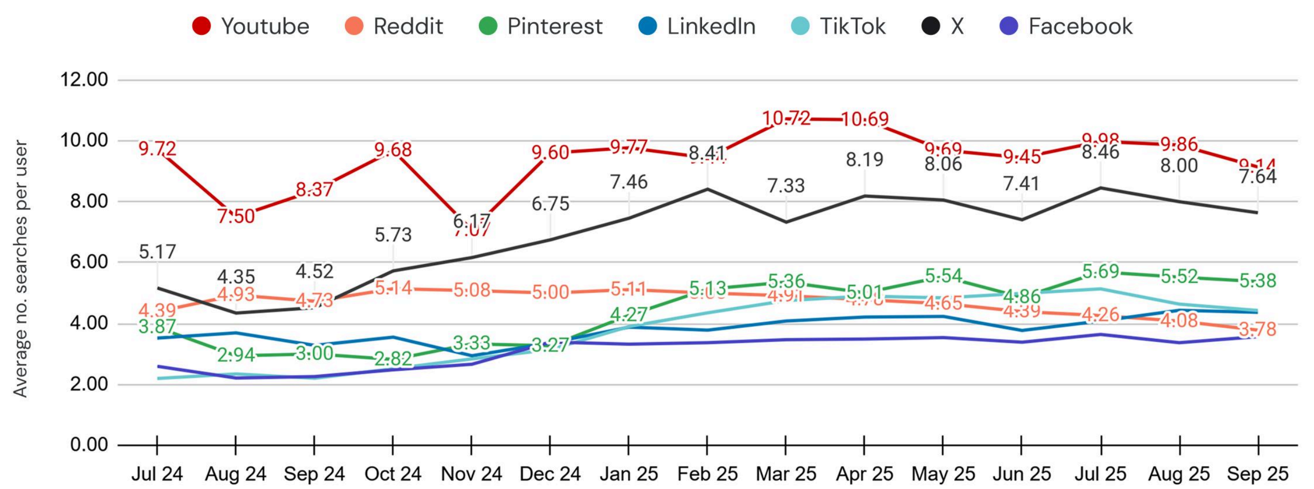
Searches per US desktop user on content platforms



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 who performed at least one search on a given domain

SparkToro

Source: Datos

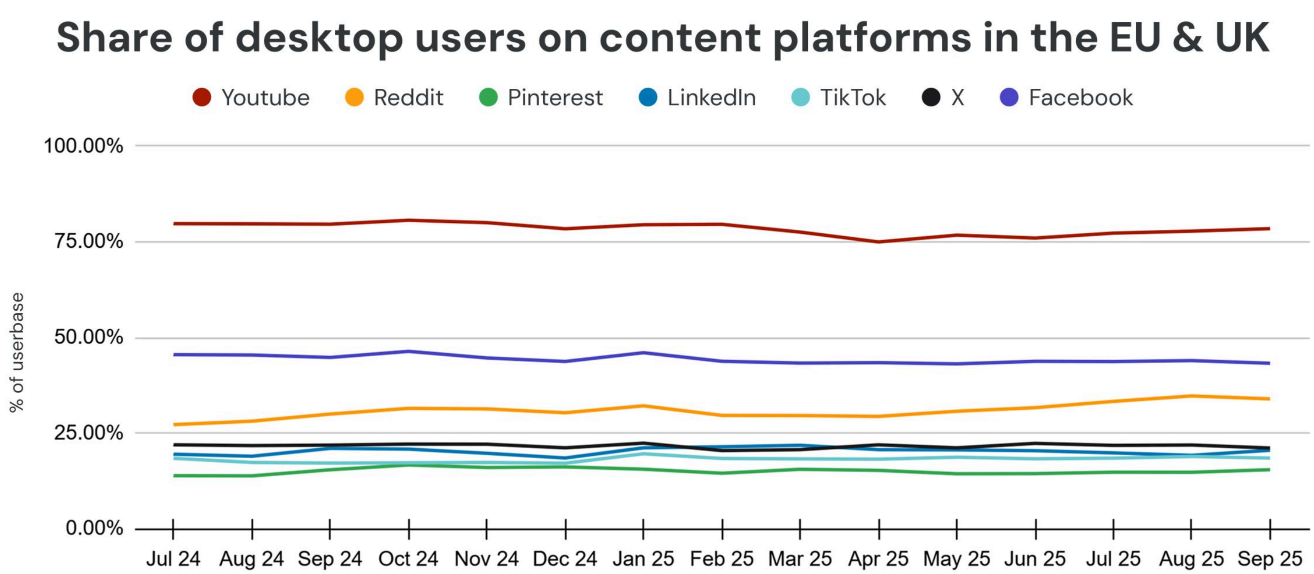
Datos
A Semrush Company

The US content platform landscape in Q3 2025 shows steady, well-defined tiers of engagement and reach. YouTube continued to dominate with a commanding 70–75% of desktop users, supported by an average of 9–10 searches per user, demonstrating both broad reach and depth of engagement. After slight dips earlier in the year, YouTube stabilized through Q3, maintaining its position as a core destination for content discovery.

Reddit and Facebook occupy a solid second tier, each engaging around 35–40% of desktop users. While Reddit's user base and activity held steady, its searches per user saw mild decline. Facebook's gradual, incremental growth underscores ongoing, steady engagement.

Below these, X, LinkedIn, TikTok, and Pinterest share smaller but resilient segments of the user base. TikTok and LinkedIn exhibit similar fluctuation rhythms, hinting at parallel engagement cycles for entertainment and professional content. Pinterest, however, stands out with its steady rise in both user share and searches per user, nearly doubling since 2024.

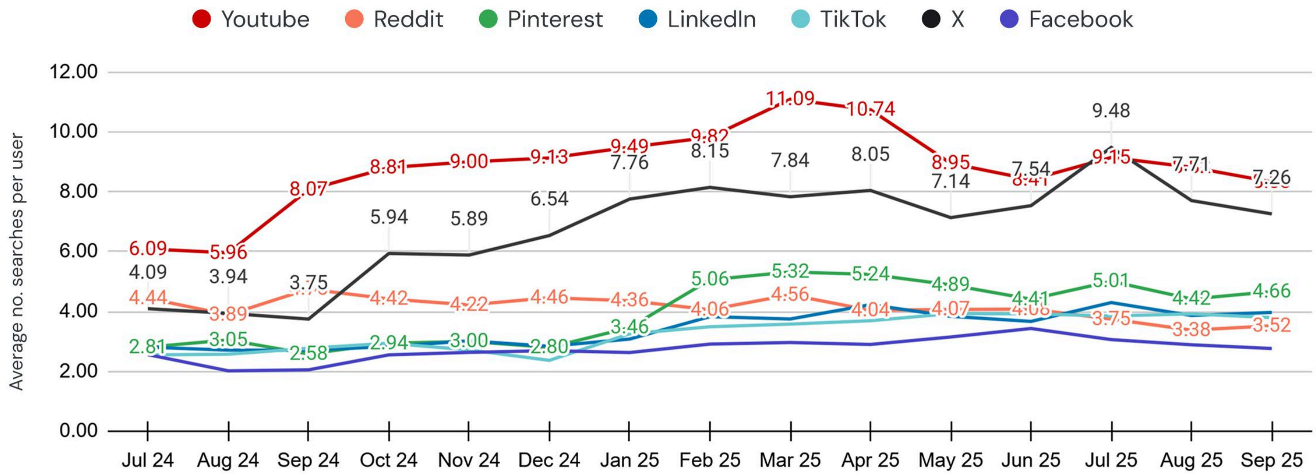
Overall, the US desktop content ecosystem appears top-heavy and stable. User behavior is increasingly routine, with little volatility and a clear structural hierarchy: YouTube remains far ahead, Reddit and Facebook form the steady middle, and smaller platforms continue to serve consistent but specialized audiences.



*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

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 who performed at least one search on a given domain

Source: Datos

YouTube remains the leading content platform in the EU and UK, though its dominance is slightly narrower than in the US. After a temporary dip in Q2, YouTube recovered in both reach and engagement, stabilizing at roughly 9–10 searches per user, matching US levels.

Reddit has shown consistent growth throughout the year, moving up from the lower tier (previously alongside TikTok, LinkedIn, Pinterest, and X) to approach Facebook's reach levels and mirroring a similar trajectory to the US.

Pinterest and TikTok both saw solid gains in engagement, averaging 4–5 searches per user by Q3, maintaining upward momentum across the year. LinkedIn and Facebook posted slower but steady increases, reinforcing their enduring positions in professional and social content contexts respectively.

Overall, the European content landscape presents less dominance and more diversity compared to the US. Rather than a single platform monopoly, user activity is more evenly distributed across a wider range of platforms.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Those Reddit numbers are shocking. I doubt anyone would have predicted 2 years ago that Reddit would overtake Facebook in desktop visits in the US and nearly match them in the EU and UK. As a marketer, I've personally found myself investing more in Reddit–the reach is undeniable, and the influence on other platforms (search engines, AI tools, and what people talk about on social media/in the press) makes it a must-participate, even in B2B.

Key Takeaways

- **Google's dominance persists with remarkable stability, retaining about 95% of desktop search share across both US and EU markets. Minor quarterly fluctuations reinforce its entrenched position, rather than suggest any structural change.**

- **AI-driven tools enter a phase of consistent mainstream use, with ChatGPT surpassing 30% of US desktop users and 40% in Europe. Growth momentum was sustained quarter over quarter, while other players like Gemini, Claude, and Perplexity established more niche but steady user bases.**

- **E-commerce engagement steadies after mid-year softness, led by Amazon's recovery to nearly half of US visits and a more distributed competitive field in Europe. The data suggest stronger conversion behavior among active users, even as overall participation moderates.**

- **Content platforms show durable hierarchies, with YouTube maintaining dominant reach and Reddit, Facebook, and Pinterest solidifying strong middle-tier engagement. Pinterest also displayed continued growth.**

- **Digital behavior overall shows normalization and maturity, marked by smaller swings, diversified user attention, and an emerging equilibrium between traditional search, AI exploration, and platform-based discovery – a sign of an integrated, post-transition digital landscape.**

As people move fluidly between tools, platforms, and intents, the lines separating search, content, commerce, and AI are increasingly dissolving. For marketers, SEOs, and platform strategists, staying alert to these shifts – and acting on them quickly – is now a key competitive edge.

At Datos, we help you stay ahead by uncovering real-world patterns in how people search, discover, and decide. Our mission is to equip you with the intelligence to anticipate change and make smarter, more confident decisions. Reach out to explore how Datos can help you achieve your goals.

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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 July 2024 – September 2025. For further information please visit Datos's website and its Privacy Policy.

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