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State of Search Q2 2025:
Behaviors, Trends, and Clicks Across the US & Europe

Q2 2025

Introduction

The nature of search continues to evolve, shaped not just by user behavior, but by shifting platform incentives, changing content ecosystems, and rapid technological innovation.

In the last 12 months, search activity has seen ongoing transformation. The introduction of AI Overviews on Google, the growth of dedicated AI tools like ChatGPT and Perplexity, and the launch of AI browsers like Comet are all shifting how people look for information online.

While Google remains dominant amongst traditional search engines, their function and output are changing, with AI-generated content now a regular part of SERPs. Google's newly launched AI Mode, offering a more chat-style, interactive experience, represents yet another step toward this transformation.

Spanning April 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 April 2024 to June 2025.

It includes:

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

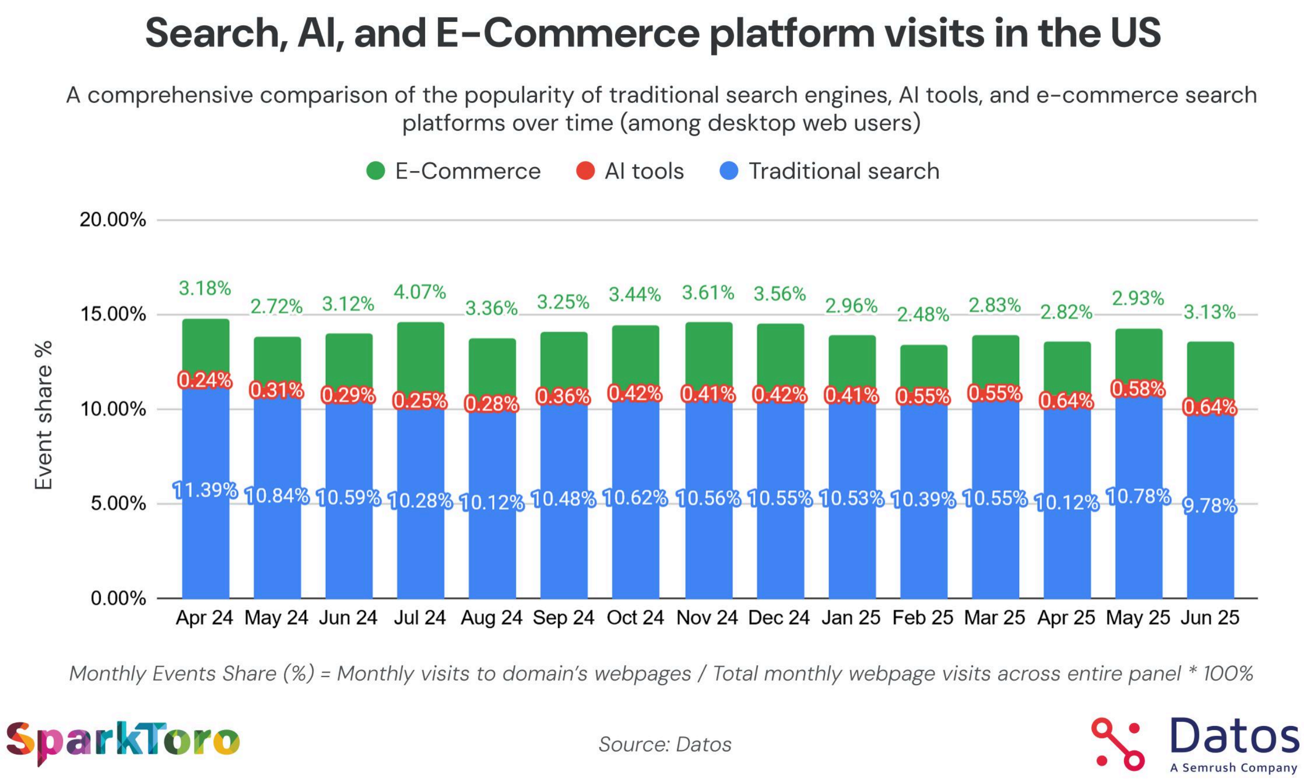
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Q2 of 2025 showed me three things I wasn't expecting: potential cracks showing in Google's previously untouchable search monopoly armor (as desktop searches/searcher inched down), faster-than-expected growth rate of AI tools by desktop users, and flattening of organic clicks in Google (when I'd anticipated severe declines). There's some data here that doesn't fit with the clean narratives from the media or the marketing worlds, but that's the beauty of real numbers: they transparently show us how complex reality is.

Traditional search, AI, and e-commerce

To start, we looked at what percentage of overall panel activity (calculated as events) consisted of visiting traditional search engines, AI tools, and e-commerce sites.



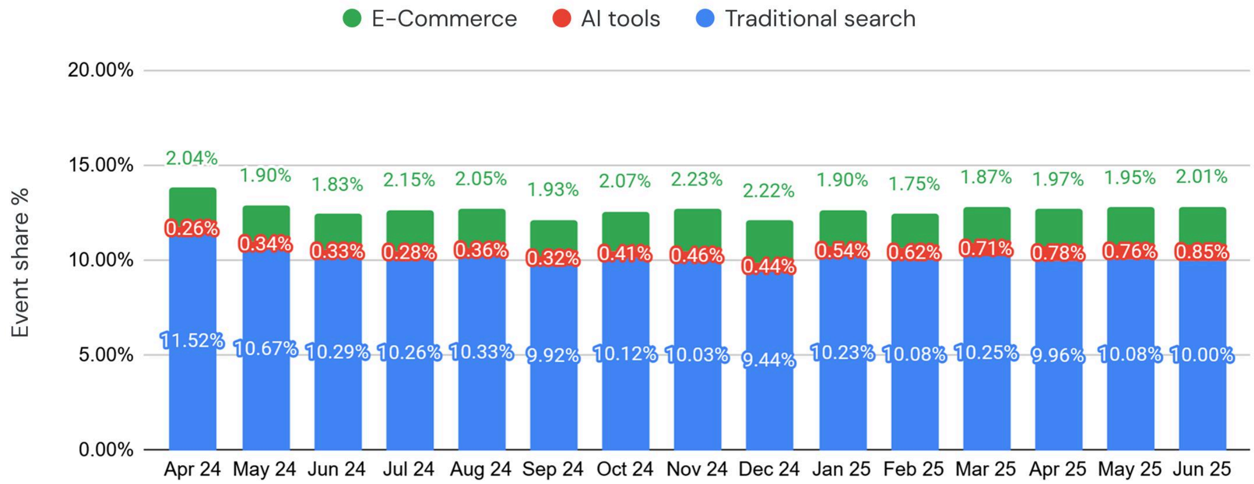
In the US, traditional search continues to dominate user activity.

Activity in AI tools has seen a consistent rise in event share, growing from 0.24% in April 2024 to 0.64% by April 2025. While the numbers remain relatively small, the growth rate is significant, nearly tripling in share over the year.

E-commerce event share has remained relatively stable overall, with fluctuations month-to-month, peaking at 4.07% in July 2024 and dipping to 2.48% in February 2025.

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

A comprehensive comparison of the popularity of traditional search engines, AI tools, and e-commerce search platforms over time (among desktop web users)



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

SparkToro — *Source: Datos* — Datos A Semrush Company

Traditional search similarly dominates in Europe.

AI tools show more aggressive growth than in the US, rising from 0.26% in April 2024 to 0.78% by April 2025. Notably, the Q2 2025 growth alone was strong, rising from 0.71% in March to 0.85% in June. This steeper European growth curve is consistent with the Q1 report which showed the EU & UK outpacing the US in AI adoption by Q1's end.

E-commerce remains stable, hovering between 1.75% and 2.23% over the past year, with a slight upward tilt in Q2 2025.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

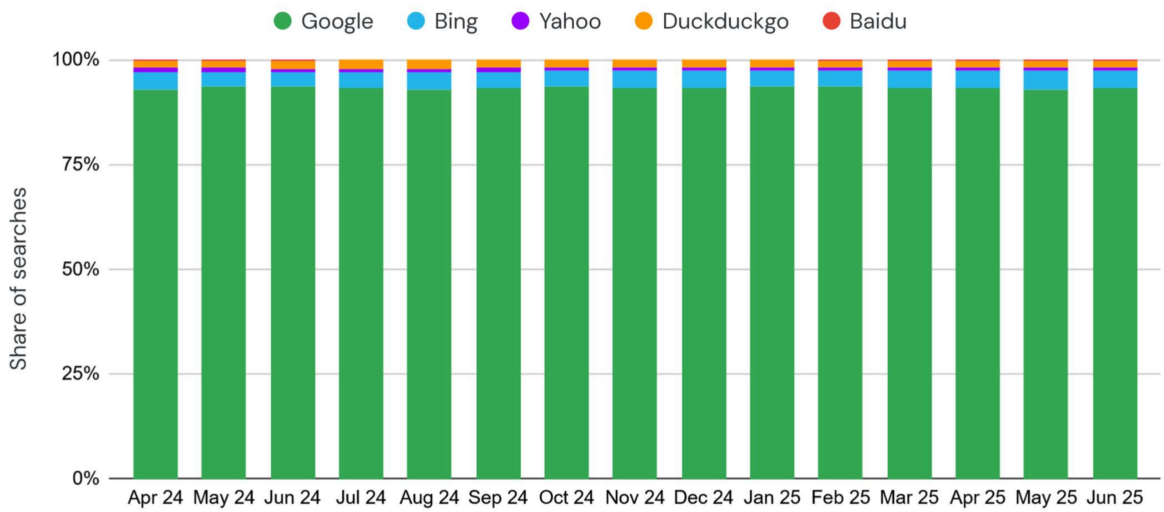
The true rate of growth for AI Tools might be surprising when contrasted against the media hype, but I'm actually surprised in the other direction. AI tool adoption has almost tripled in a year in the EU/UK and more than doubled in the US. While they're still a tiny fraction of traditional search's size (remember, only ~1 in 8 prompts has search-like intent; most of AI use is for generative tasks) we cannot discount AI entirely – if it can maintain the current growth trajectory (doubling ~every year or two), in 6-10 years it could rival traditional search engines in raw usage.

State of traditional search

How the top 5 biggest "traditional" (non-AI) search engines have been faring from Q2 2024 to Q2 2025.

Desktop web search in the US

A breakdown of US desktop search volume share across the five major, traditional search engines

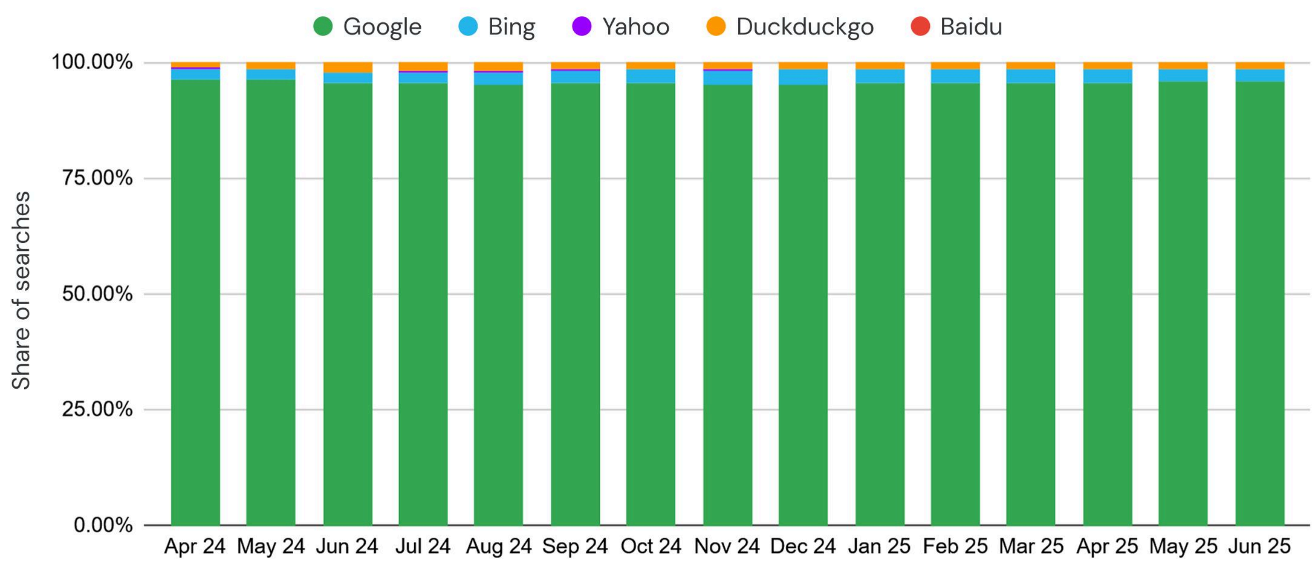


*Share of Searches = Sum of unique searches per user per day on a given domain, during the month / Sum of unique searches per user per day across across all listed domains, during the month * 100%*

Source: Datos

Desktop web search in the EU & UK

A breakdown of EU + UK desktop search volume share across the five major, traditional search engines

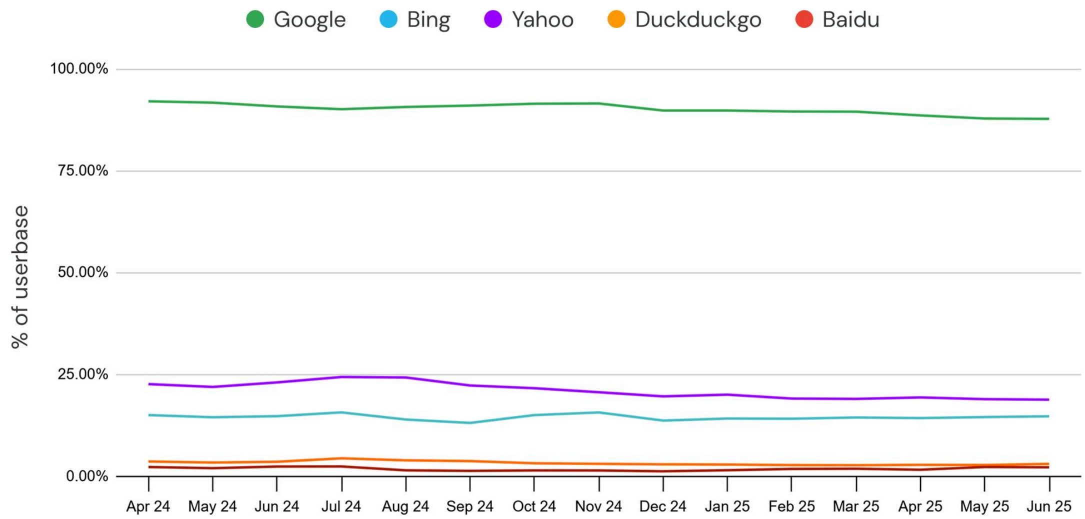


*Share of Searches = Sum of unique searches per user per day on a given domain, during the month / Sum of unique searches per user per day across across all listed domains, during the month * 100%*

Source: Datos

Share of desktop web search users in the US

The share of desktop users in the US performing web searches across the five major traditional search engines

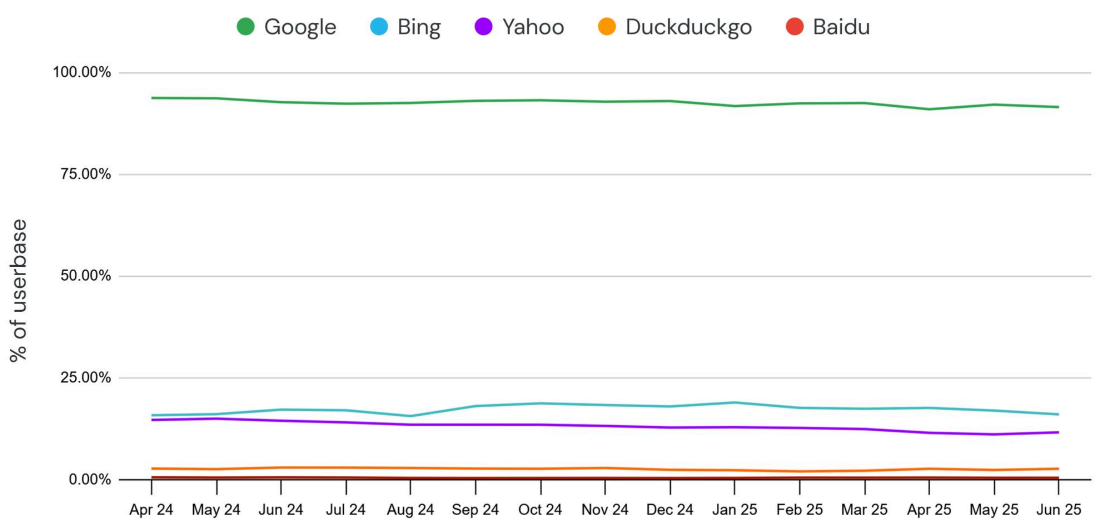


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro *Source: Datos* Datos A Semrush Company

Share of desktop web search users in the EU & UK

The share of desktop users in the EU & UK performing web searches across the five major traditional search engines



*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 both the US and Europe, Google retains an overwhelming share (~95%) of both userbase and searches, almost flat over the timeframe. Yahoo and Bing are in a distant second place in the US and Europe respectively.

DuckDuckGo, Yahoo, and Baidu each hold minor, stable slices, with no significant shifts. Yahoo remained more popular in the US compared to Europe, both in terms of searches and users. In the US, Bing came second to Google in search events.

Traditional search is declining gradually but still dominates – both Google's market share and overall event volume remain stable.

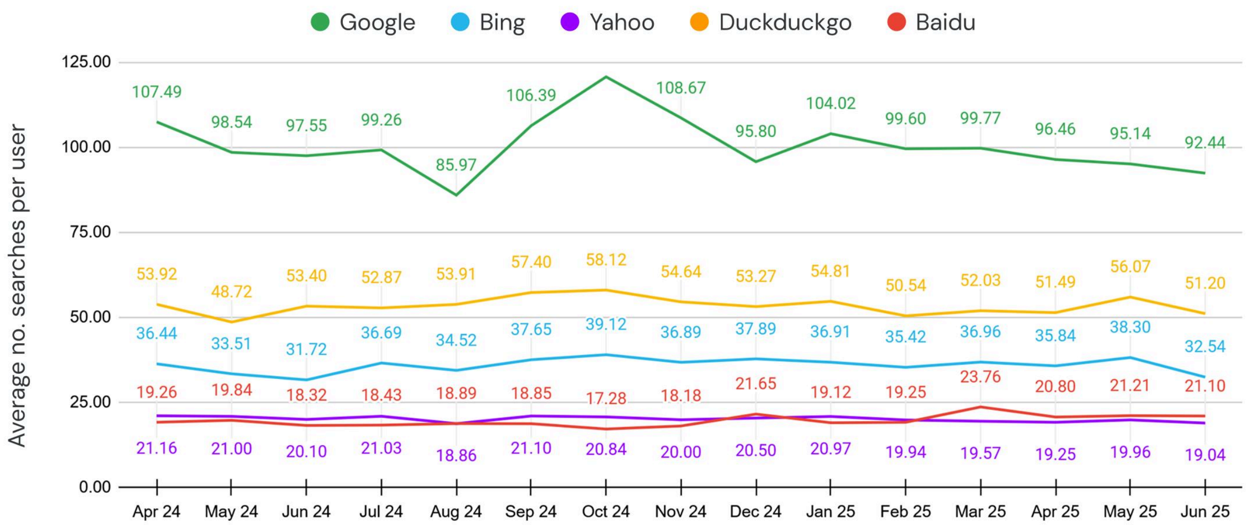
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Unsurprisingly, there's very little to report in the traditional search engine market. Google dominates. No one is taking share from them in meaningful ways. If you want to appear in traditional web search (and you should, because 99% of people still use it to find what they're seeking on the web), Google remains an undisputed monopoly.

Searches per US desktop searcher

An over-time view of how many searches the average US desktop searcher performs on traditional search engines

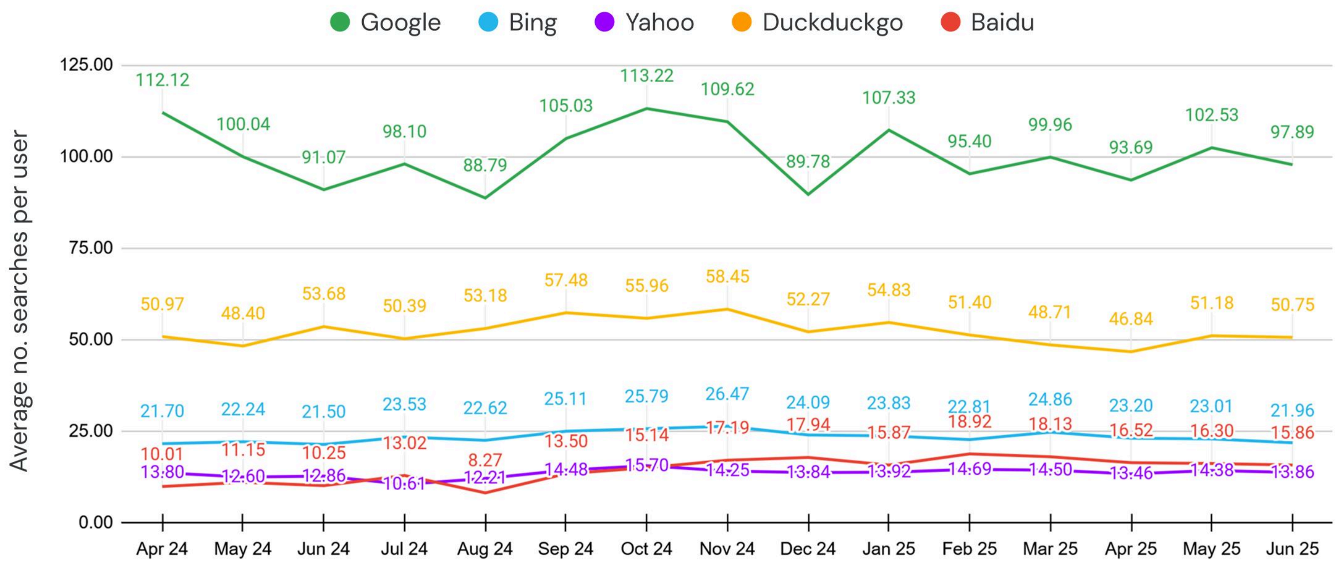


Average number of searches per user = Sum of unique searches per user per day on a given domain, during the month / Number of unique users visiting the domain's webpages (monthly) at least once

Source: Datos

Searches per EU & UK desktop searcher

An over-time view of how many searches the average EU + UK desktop searcher performs on traditional search engines



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

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Source: Datos

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In terms of searches per user, we see ongoing patterns as observed in our Q1 report: Google remains at the top, with Duckduckgo being a surprise second, with seemingly a smaller but active userbase.

Rand's Take

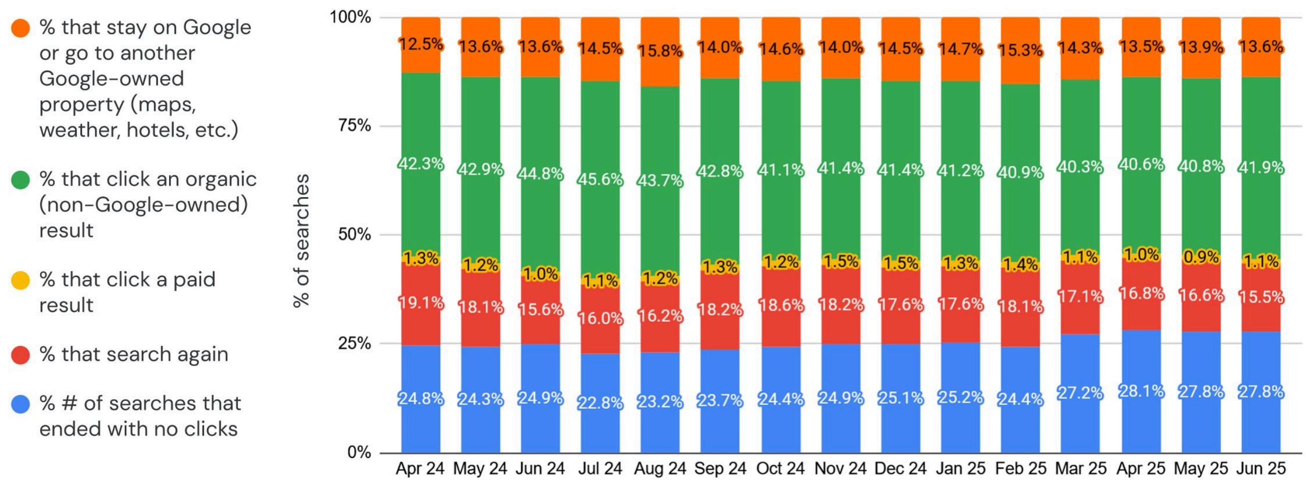
Rand Fishkin
SparkToro Co-founder & CEO

OK, now this is interesting. A single quarter doesn't prove the critics right, but for those obsessed with the idea that AI must be taking real market share from Google, the steady decline of searches/searcher is a potential data point in their favor. Granted, it's a very tiny slide, but it's quite clearly the end of the rapid growth we saw from 2023 to 2024 (when Google grew by 4X ChatGPT's in search volume).

Next, an updated view of what Google users were doing immediately after performing a search.

Distribution of Google US desktop search clicks over time

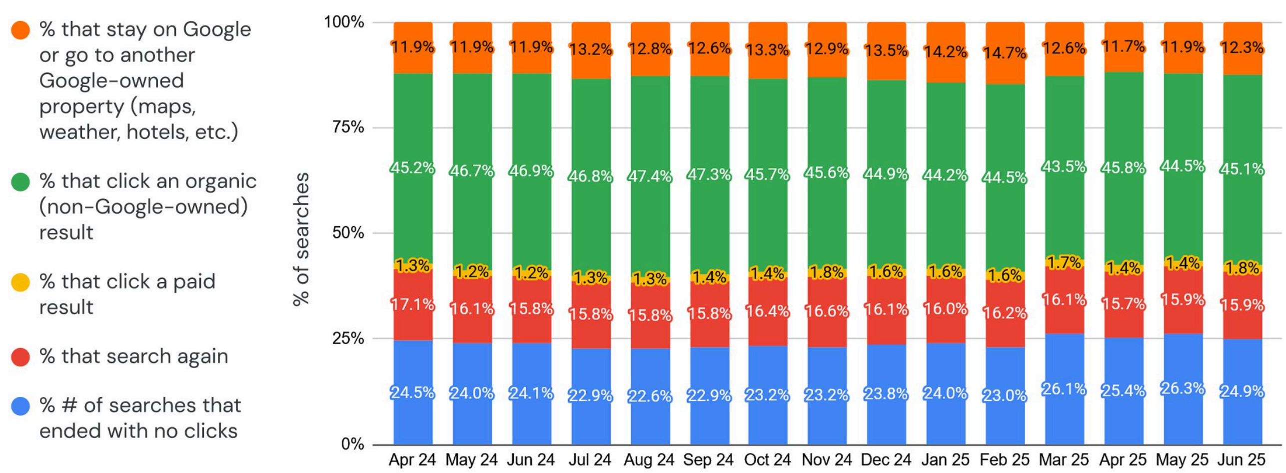
What happens, on average, after desktop web users in the US search Google, visualized over time.



Source: Datos

Distribution of Google EU & UK desktop search clicks over time

What happens, on average, after desktop web users in the EU & UK search Google, visualized over time.



Source: Datos

Organic clicks (visiting a webpage outside of Google that was not via a paid advertisement) remain the most common outcome after a Google search in both regions. Europe tracked slightly higher than in the US, consistently in the 44–47% range

Zero-click searches showed a notable increase in the US from March 2025 onwards. Europe showed a similar, though less dramatic uptick in zero-click searches, potentially driven by improved SERP snippets or AI Overviews satisfying queries immediately.

Repeated searches showed a minor fluctuating pattern in the US from March 2025, with a similar trend in Europe.

The biggest shift since Q1 is the continued growth in zero-click behavior, especially in the US. While AI Overviews were rolled out in May 2024, the Q1 data showed little immediate effect. The Q2 data, however, now suggests that zero-click behavior is indeed gradually climbing, especially in the US. The EU & UK remains more stable, and the divergence hints at different SERP engagement preferences across regions.

Rand's Take

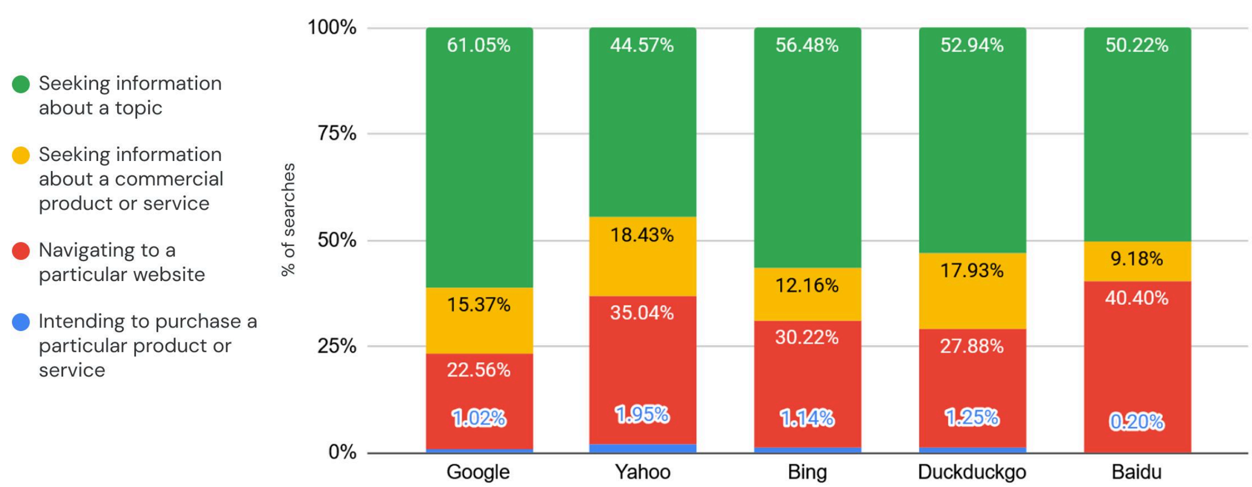
Rand Fishkin
SparkToro Co-founder & CEO

I do not like green bars that shrink. I do not like them, not a wink. Makes me wonder if organic search... has fallen from its once-lofty perch. But people like answers in the search result, and so that's what we get from the Google cult. Best prepare for the zero click world; I suspect more click-draining features will soon be unfurled.

P.S. If you wanted "normal, formal, professional" commentary, ask an AI. I'm feeling Suessian.

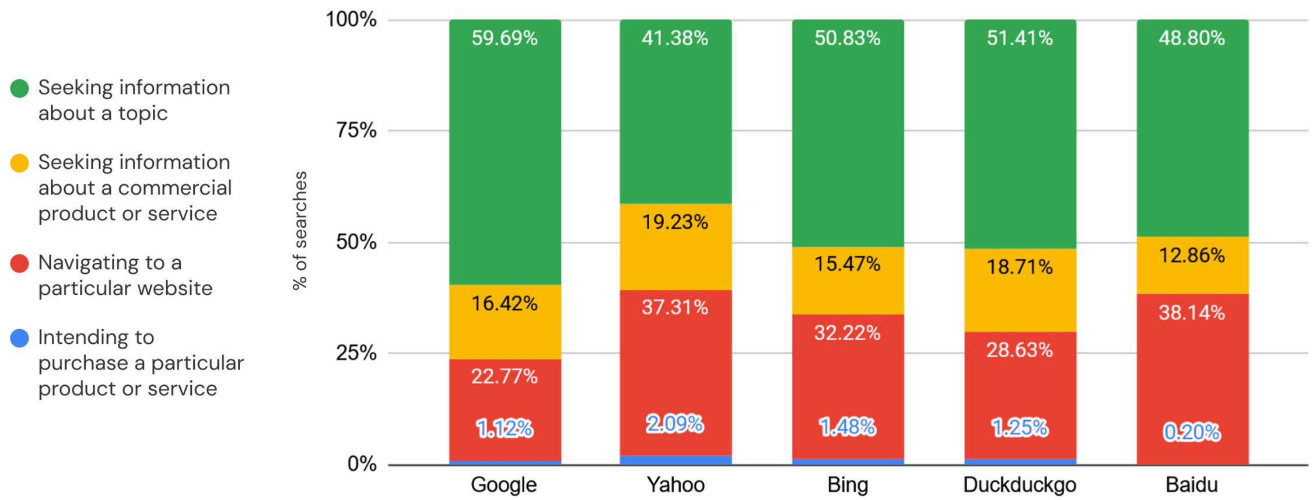
Seeing what searchers did after searching on Google, we were able to categorize their search intent by using our algorithm, powered by our vector embeddings.

Categorization of US desktop search intent in Q2 2024



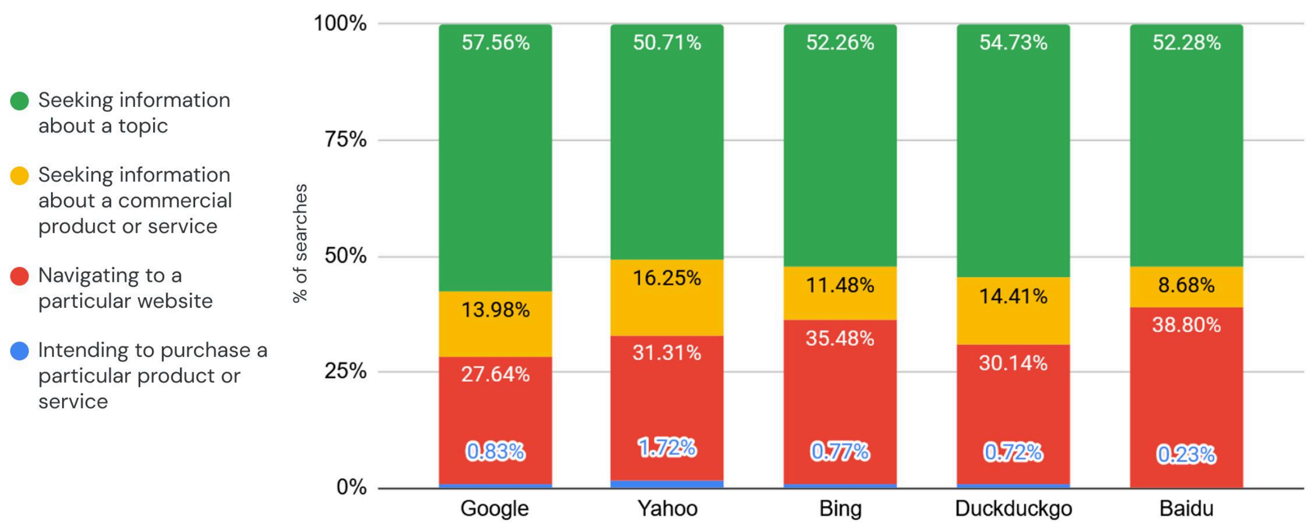
Source: Datos

Categorization of US desktop search intent in Q2 2025



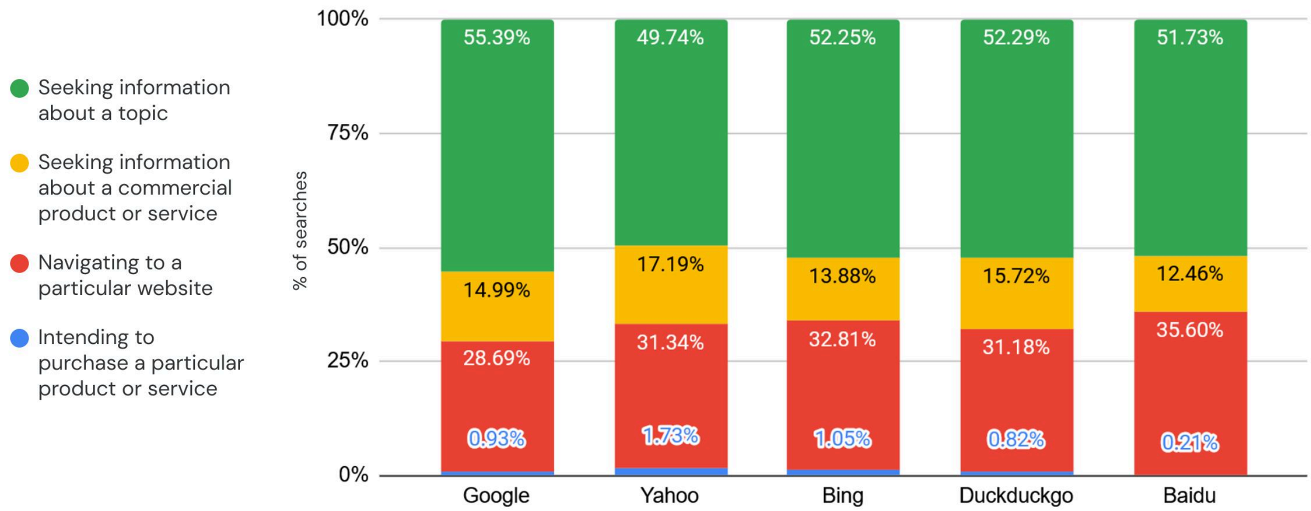
Source: Datos

Categorization of EU & UK desktop search intent in Q2 2024



Source: Datos

Categorization of EU & UK desktop search intent in Q2 2025



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Source: Datos

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Across the EU & UK, search intent patterns were broadly consistent with those seen in the US, though with some subtle regional differences.

Google was more commonly used for navigation to a particular website in Europe compared to the USA, though compared to all the other search engines, Google was used least for this purpose in both regions. Baidu had the highest proportion of navigational searches and the lowest rate of purchase-intent queries.

As in Q1, across all search engines, purchase-intent queries remained below 2.1%, confirming once again that direct conversion-driven searches are a minority. Yahoo retained the highest such share at 2.09% in the US and 1.73% in Europe, both up marginally from Q2 2024.

In Europe, Yahoo and Bing followed very similar trajectories to their US counterparts, while Baidu saw an increase in search share for commercial products or services.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I'm actually quite surprised and fascinated to see that Google has the most "informationally"-minded searchers and that Baidu, of all places, is the most navigational. Honestly, I'd have guessed just the inverse (another reason I love real, clickstream data > surveys or interviews).

Top US search destination domains Q2 2024 - Q2 2025

The tables below show the top 15 external domains visited from search engines in Q2 2024 and Q2 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

Q2 2024

Rank	Site name
1	youtube.com
2	reddit.com
3	amazon.com
4	wikipedia.org
5	facebook.com
6	microsoft.com
7	instagram.com
8	quora.com
9	linkedin.com
10	chatgpt.com
11	tiktok.com
12	twitter.com
13	google.com
14	store.steampowered.com
15	ebay.com

Q2 2025

Rank	Site name
1	youtube.com
2	reddit.com
3	amazon.com
4	facebook.com
5	wikipedia.org
6	instagram.com
7	microsoft.com
8	tiktok.com
9	chatgpt.com
10	linkedin.com
11	ebay.com
12	x.com
13	google.com
14	store.steampowered.com
15	walmart.com

SparkToro

Source: Datos

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The updated ranking of the most visited domains from traditional desktop search in the US shows relative consistency at the top, with some shifts in AI, social media, and e-commerce destinations.

US platform traffic shifts

- **YouTube and Reddit maintain dominance:** YouTube retained the #1 spot, and Reddit stayed at #2, together continuing to absorb a large share of click-throughs.
- **Socials stay strong:** Facebook moved from #5 to #4, TikTok rose from #11 to #8 and Instagram rose by one point to #6.
- **Amazon remains stable:** Despite dropping sharply between Q1 2024 and Q1 2025, Amazon.com retained its #3 position in Q2, suggesting a stabilization in search-driven shopping visits.

- **Quora falls off:** The question-and-answer site was at an impressive #8 in Q2 2024 but failed to make the top 15 in 2025.

AI and new entries shift the landscape

- **ChatGPT.com at #9:** ChatGPT remained in the top 10, climbing one spot to #9 reflecting the continued popularity of AI tools.
- **Walmart joins the list:** Walmart.com entered at #15, possibly driven by broader e-commerce discovery behaviors beyond Amazon. Ebay also climbed 4 points to #11.
- **X.com replaces previous URL Twitter.com:** Twitter dropped from the list and was replaced by X.com at the same position of #12 following the platform's rebrand.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

There's been a good bit of chatter about Quora getting overly aggressive with their forced-login system and stingy number of free clicks (even stingier than notoriously hard to visit-without-paying publications like the WSJ and NYTimes). I think their growth hacking adventures may well have bitten them in the back. We'll see if they dial those down and return to Google's good graces.

Top European search destination domains Q2 2024 - Q2 2025

The tables below show the top 15 domains visited from search engines in Q2 2024 and Q2 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

Q2 2024

Rank	Site name
1	youtube.com
2	microsoft.com
3	facebook.com
4	reddit.com
5	wikipedia.org
6	amazon.com
7	instagram.com
8	chatgpt.com
9	store.steampowered.com
10	tiktok.com
11	linkedin.com
12	twitter.com
13	github.com
14	quora.com
15	imdb.com

Q2 2025

Rank	Site name
1	youtube.com
2	reddit.com
3	facebook.com
4	microsoft.com
5	instagram.com
6	amazon.com
7	wikipedia.org
8	chatgpt.com
9	tiktok.com
10	store.steampowered.com
11	openai.com
12	x.com
13	linkedin.com
14	canva.com
15	github.com

SparkToro

Source: Datos

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Search-driven traffic in the EU and UK tells a slightly different story, marked by content platform stability, AI growth, and a few new productivity entrants.

YouTube continues to lead

- **YouTube holds #1:** Like in the US, YouTube maintained the top spot, reinforcing its role as the most common destination from traditional search queries.
- **Reddit climbs to #2:** Climbing from #4, Reddit overtook Facebook and Microsoft to become the second-most clicked destination in Q2 2025.

AI domains and content tools gain traction

- **ChatGPT.com holds steady at #8:** ChatGPT.com held the same spot as the previous year's quarter, a little higher than in the US.
- **Canva enters at #14:** Canva's entry hints at a rise in searches related to creative, design, and productivity workflows.

Declines and replacements

- **Quora and IMDb drop out:** Both domains left the top 15, similar to the US trend.
- **Twitter replaced by X.com:** Just as in the US, Twitter's domain exited and was replaced by X.com at #12, after the platform's rebranding.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Honestly, it's a miracle that Google continues to reward Twitter/X with search traffic. I suspect a big part of that is the holdover from the visibility deal they made prior to the new ownership, and that in the next few years (whenever that agreement is up) we see them replaced by a combination of LinkedIn, Threads, Bluesky, and Instagram/Tiktok.

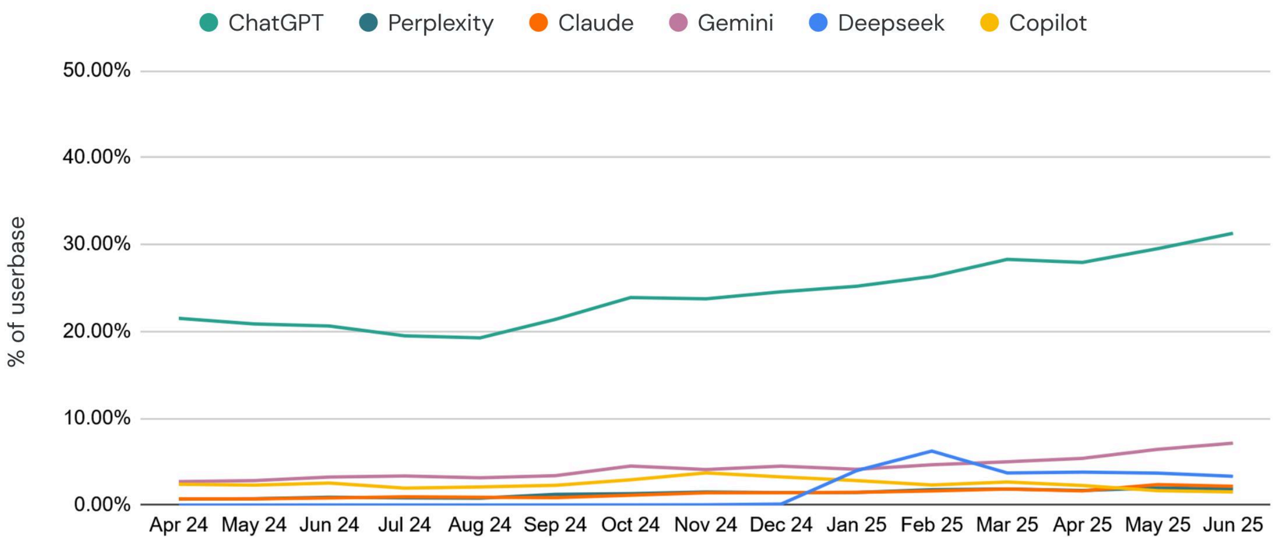
Key takeaways for traditional search

- **Google remains dominant – but search is diversifying:** Google maintained an overwhelming ~95% share of desktop web search in both the US and Europe from Q2 2024 to Q2 2025.
- **Zero-click searches are slowly rising, especially in the US:** In Q1, we observed only a minor uptick in zero-click behavior after the rollout of Google's AI Overviews. In Q2, however, the US showed a more noticeable rise in searches that resulted in no external clicks, alongside a corresponding decline in repeat searches. Europe saw similar trends but to a lesser degree.
- **Intent is stable, but slightly more commercial and navigational:** Across all engines, the majority of searches continued to be informational. However, commercial and navigational queries ticked up slightly in Q2 2025.
- **AI and social platforms are top destinations:** Social platforms like YouTube, Reddit, Instagram, and Facebook remain top destinations from traditional search, while ChatGPT.com entered the top 10 in both regions.

State of AI search

Share of desktop users using AI in the US

A comparison of how market share in the AI tools market has grown over time among desktop web users in the US

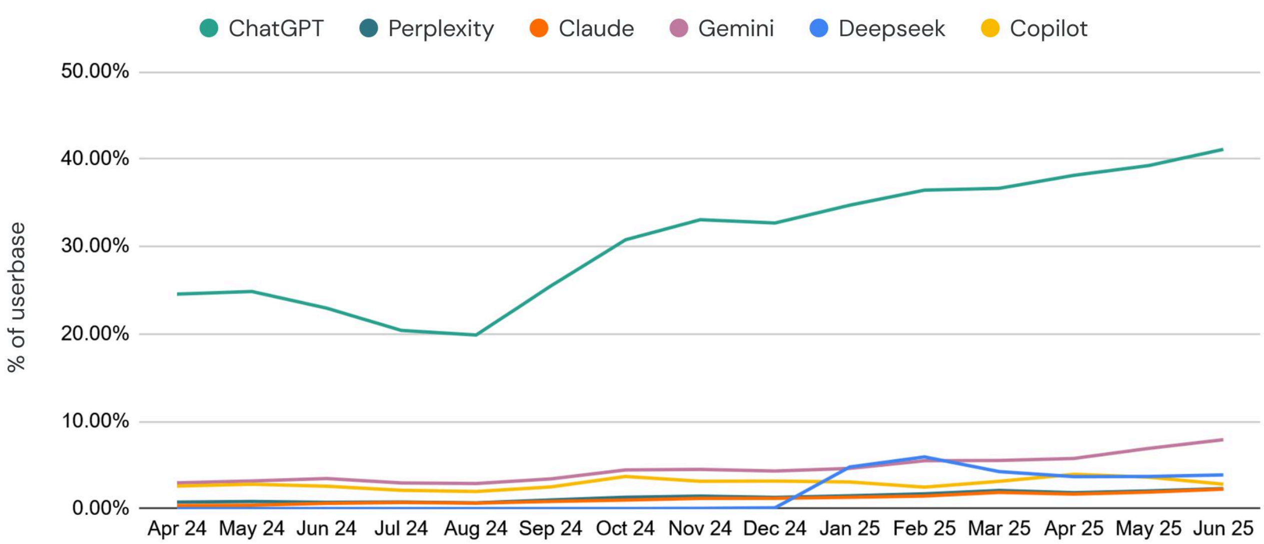


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

Source: Datos

Share of desktop users using AI in the EU & UK

A comparison of how market share in the AI tools market has grown over time among desktop web users 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

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

Overall Adoption

Both regions continued to show strong growth in AI tool usage from Q2 2024 through Q2 2025, but the EU & UK have pulled ahead in userbase penetration.

- In the US, ChatGPT userbase share climbed steadily from around 21% in May 2024 to just under 30% in May 2025. In contrast, European adoption started higher and grew faster, rising from ~24% to just under 40% by May 2025.
- This extends the pattern from the previous period: Europe continues to lead the US in AI tool adoption by nearly 10 percentage points.

ChatGPT remains dominant

- ChatGPT maintained a clear lead in both regions.
- While both regions saw a slight mid-year plateau, growth accelerated again in late 2024.

Other AI tools fluctuate

- Gemini continued its slow and steady climb in both regions.
- Deepseek experienced a noticeable but short-lived surge beginning in January 2025. In both the US and Europe, it spiked to around 6–7% in February 2025, then dropped back to ~3% by June. This suggests users tried the new tool, but it did not maintain long-term retention.
- Perplexity, Copilot, and Claude remain niche, maintaining lower but stable usage levels.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I'm excited for and deeply curious about what the AI tool numbers will look like when we explore heavier usage than "at least 1 visit/month." My guess is there are a lot of looky-loos given the media hype cycle and pop culture attraction, but far less exciting numbers if we filter to folks who use AI tools 5 or even 3X or more each month.

Top US AI destination domains Q2 2024 - Q2 2025

Top domains visited from US desktop AI tools

Q2 2024

Rank	Site name
1	google.com
2	youtube.com
3	microsoft.com
4	bing.com
5	github.com
6	linkedin.com
7	amazon.com
8	grammarly.com
9	facebook.com
10	reddit.com
11	chatgpt.com
12	canva.com
13	wikipedia.org
14	gemini.google.com
15	instagram.com

Q2 2025

Rank	Site name
1	google.com
2	youtube.com
3	github.com
4	amazon.com
5	microsoft.com
6	reddit.com
7	wikipedia.org
8	nih.gov
9	linkedin.com
10	chatgpt.com
11	facebook.com
12	canva.com
13	bing.com
14	deepseek.com
15	instagram.com

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Source: Datos

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Google holds its lead, YouTube and GitHub cement their foothold

- Google.com remains the most visited site from AI tools in both Q2 2024 and Q2 2025, despite broader signs of diversification in AI browsing destinations.
- YouTube retained its #2 rank, and GitHub rose from #5 to #3, underscoring two major AI use cases: media discovery and developer productivity.

Amazon jumps into the top 5

- Amazon climbed from #7 to #4. This growth mirrors wider e-commerce trends where AI is playing a more direct role in purchase pathways.

New entries and exits reflecting task-focused behavior

- **NIH.gov enters at #8**
  This notable newcomer indicates strong demand for trustworthy, medically authoritative content.
- **Deepseek.com makes its debut**
  Deepseek.com entered the top 15 at #14, following its release earlier in 2025.

Top European AI destination domains Q2 2024 - Q2 2025

Top domains visited from EU & UK desktop AI tools

Q2 2024

Rank	Site name
1	google.com
2	youtube.com
3	microsoft.com
4	bing.com
5	github.com
6	facebook.com
7	linkedin.com
8	whatsapp.com
9	canva.com
10	chatgpt.com
11	wikipedia.org
12	gemini.google.com
13	instagram.com
14	reddit.com
15	grammarly.com

Q2 2025

Rank	Site name
1	google.com
2	youtube.com
3	github.com
4	microsoft.com
5	facebook.com
6	reddit.com
7	canva.com
8	amazon.com
9	wikipedia.org
10	instagram.com
11	linkedin.com
12	nih.gov
13	chatgpt.com
14	whatsapp.com
15	researchgate.net

SparkToro

Source: Datos

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Stability at the top, with developer tools rising

Google and YouTube retain dominance
Google.com and YouTube.com held their #1 and #2 spots respectively.

GitHub climbs to #3
GitHub rose from #5 to #3, echoing trends seen in the US and reflecting the increasing use of AI tools for code generation, software assistance, and developer workflows among European users.

Academic and research content gains ground

ResearchGate makes its debut
Researchgate.net entered the top 15 at #15, perhaps amplified by students, academics, or professionals in the region using AI for research tasks.

NIH.gov also appears
Though a US-based resource, NIH.gov entered at #12, suggesting cross-border interest in medical information via AI tools.

Shifts and drop-offs

Reddit and Instagram rise
Reddit.com climbed from #14 to #6 and Instagram.com from #13 to #10.

WhatsApp drops
Whatsapp.com, which was #8 in Q2 2024, fell to #14 in Q2 2025.

Bing and Gemini.Google.com exit the list
Bing.com and Gemini.Google.com, previously in the top 5 and top 12 respectively, fell off the list entirely.

Grammarly gone from both regions
Grammarly.com dropped out of the top domains lists for both US and Europe, which may reflect fewer writing- focused queries being routed externally – or their replacement by in-AI completions and summaries.

Key Takeaways for AI search

ChatGPT remains the centerpiece of AI browsing: With a steadily growing share in both regions, ChatGPT now anchors ~31% of AI users in the US and 41% in Europe, showing sustained utility for general-purpose and search-adjacent queries.

Deepseek's momentum fades fast: After launching in January 2025, Deepseek briefly spiked to ~6–7% usage in both regions by February 2025 but dropped back to ~3% by June, hinting at high trial but lesser retention, though still significant usage at present.

AI use cases diversify: The top AI destination domains reveal growing use cases: GitHub climbed to the #3 spot in both regions (developer tasks), NIH.gov and ResearchGate entered the top 15 (research and medical queries), and Amazon rose in the US (suggesting AI-driven shopping behaviors).

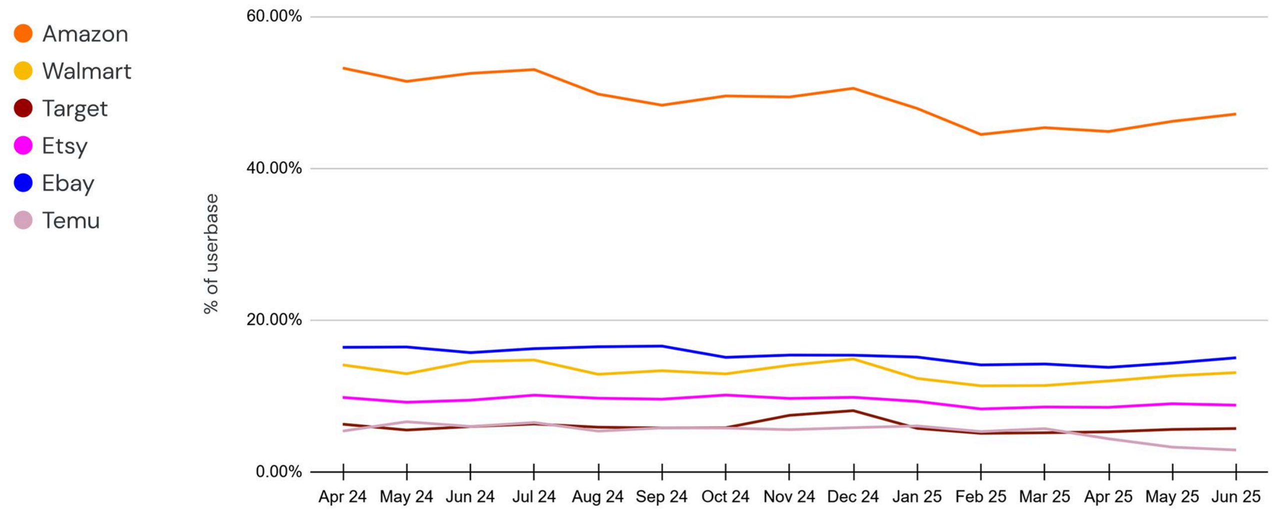
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

One important thing to consider is that we didn't get the chance to explore the amount of traffic sent from traditional search vs. AI tools. I'm guessing that ratio is 100 to 1 (or worse), and while it's quite interesting to look at where AI properties are referring traffic, we have to keep in mind they're referring vanishingly little of it.

State of E-commerce

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

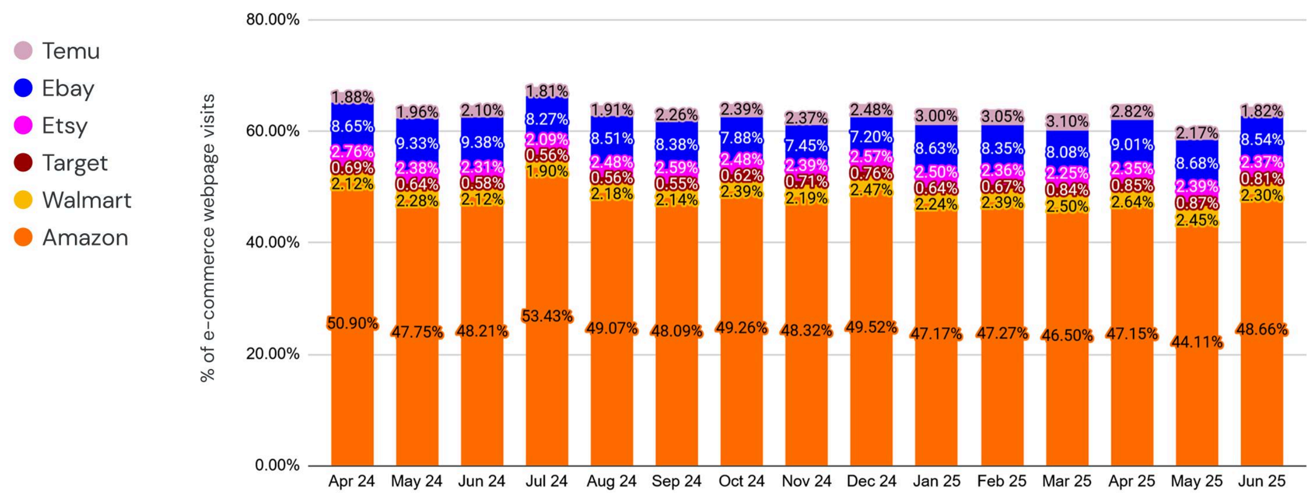


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro Source: Datos Datos A Semrush Company

Share of desktop e-commerce webpage visits in the US

A breakdown of US desktop share of visits across the major e-commerce platforms, shown over the last 2 years



*% 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

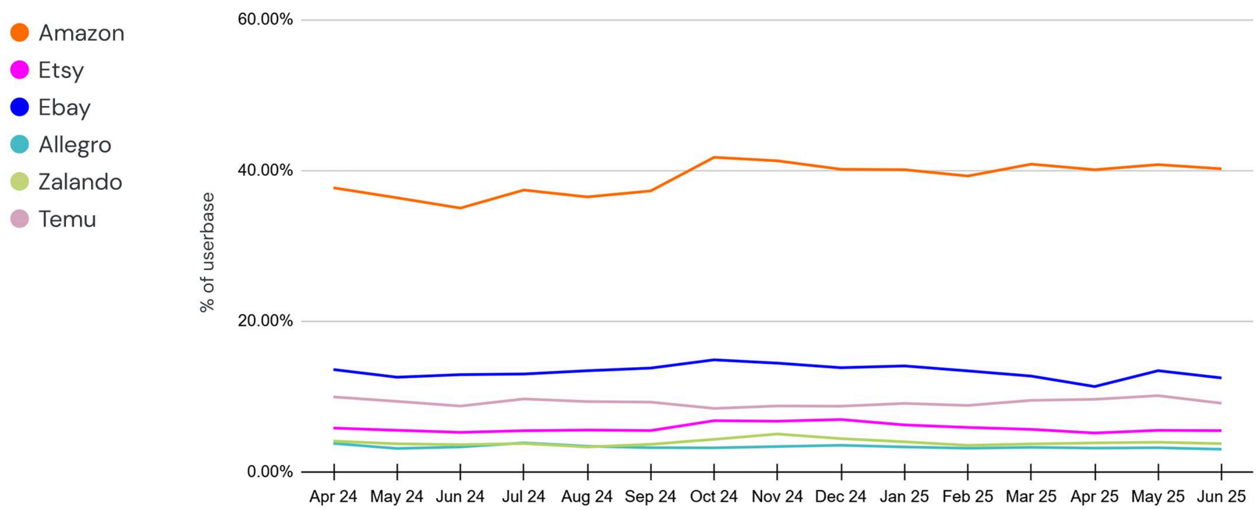
In the US, Amazon continued to command a leading share of US e-commerce desktop traffic in Q2 2025, both in terms of user reach and webpage visits. It dipped in early 2025 before partially rebounding in June, which may reflect increasing competition or seasonal variance, though its absolute dominance remains largely unchallenged.

Temu saw steady gains in webpage visits across late 2024 and Q1 2025, but started to dip in Q2 2025 in both page visits and userbase share.

Walmart maintained a stable presence throughout the year, affirming its strength as a hybrid brick-and-click retailer.

Platforms like Target, Ebay, and Etsy saw minimal movement, maintaining small but consistent shares of both user activity and page traffic.

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

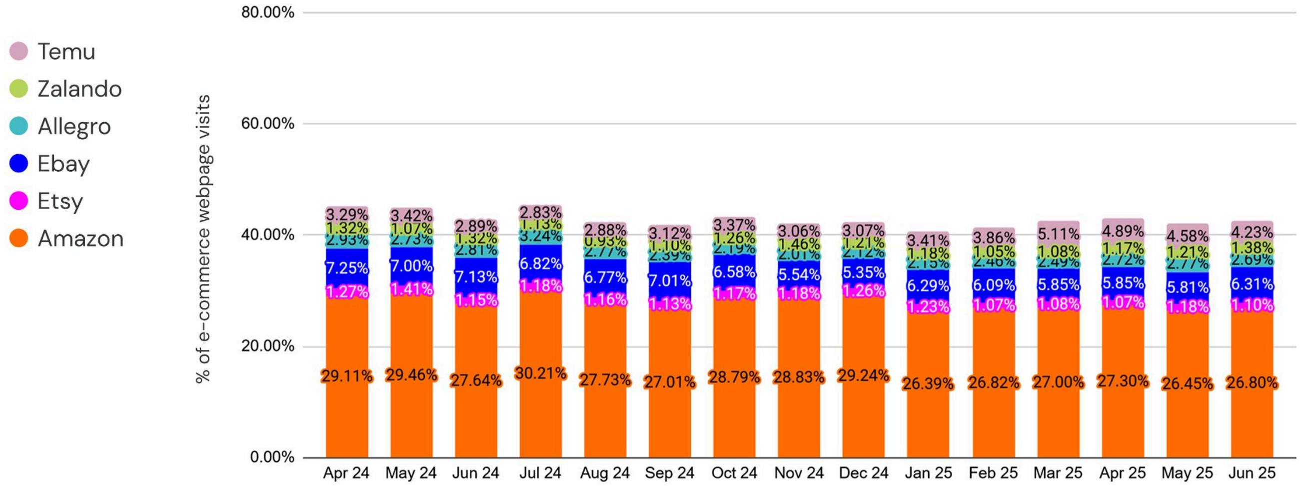


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

Source: Datos

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

A breakdown of EU + UK desktop share of visits across the major e-commerce platforms, shown over the last 2 years



*% 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

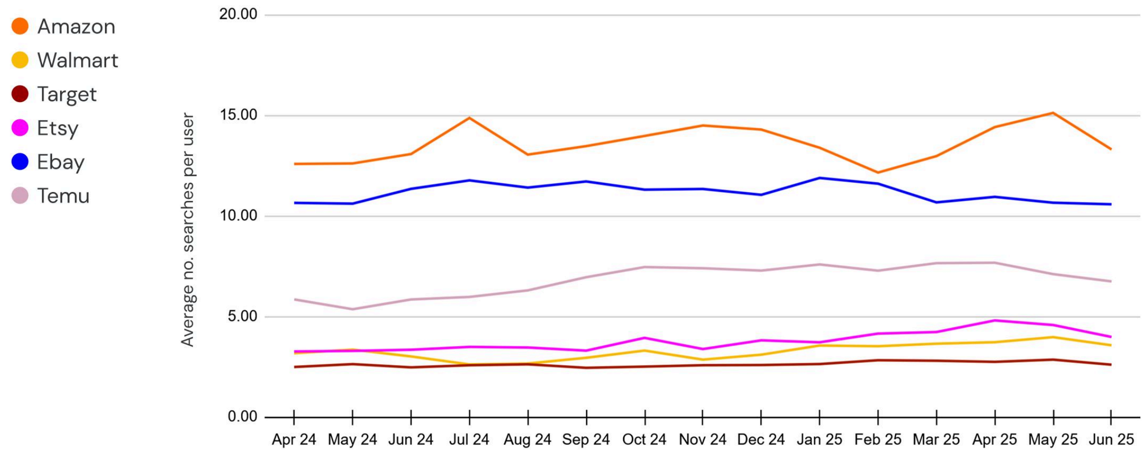
Amazon retained its lead across both user share and visit share in the EU & UK, though with less of a pronounced dominance compared to the US. While its desktop userbase held stable near the 40% mark, the decline in webpage visits suggests lower browsing intensity. This may reflect stiffer local competition and the broader diversification of the European e-commerce landscape.

Temu continued its upward trajectory into early 2025, with visit share climbing from 3.3% in April 2024 to a peak of 5.1% in March 2025. Though still far behind Amazon or eBay in total scale, Temu has cemented its status as a stable player.

eBay maintained its position as Amazon's closest competitor in the region, while Zalando and Allegro, both focused on specific European markets, preserved small but stable slices of both user reach and visit share. Etsy saw marginal changes, fluctuating between 1.07% and 1.41% in visit share.

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

Visualizing how many searches US visitors to e-commerce tools perform over time



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

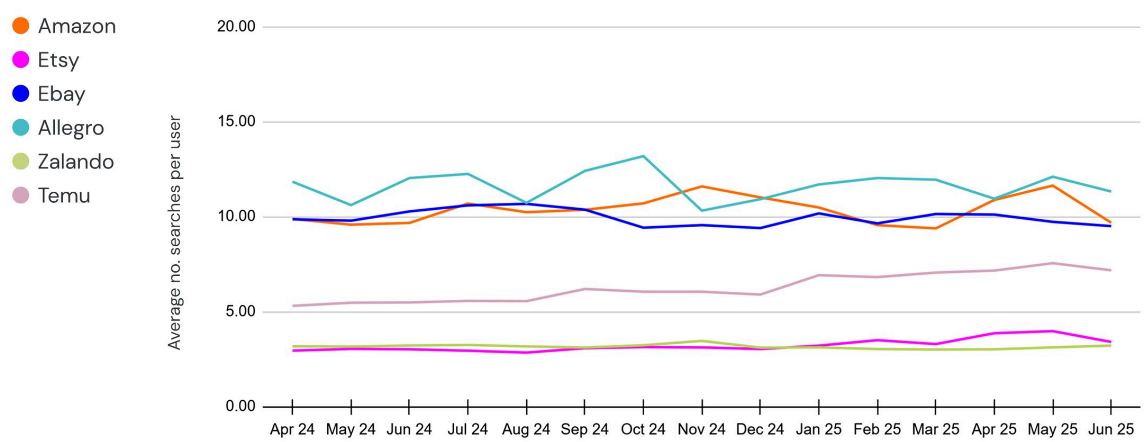
Source: Datos

In the US, Amazon and eBay continue to lead in search intensity per user. Amazon consistently held the top spot across the 15-month period, with search activity peaking at ~15 average searches per user in both July 2024 and May 2025. eBay followed closely behind, maintaining a solid range between 10–12 searches per user.

Temu also saw sustained growth in engagement, rising from ~5.8 searches per user in June 2024 to a peak of 7.67 in April 2025. This suggests growing user trust and deeper exploration of the platform. Etsy, Walmart, and Target had flatter patterns, with Etsy showing a slow and steady growth.

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

Visualizing how many searches EU + UK visitors to e-commerce tools perform over time



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 & UK, Allegro continues to dominate in terms of average searches per user. From May 2024 through June 2025, it consistently led all platforms in engagement, aside from a dip in November 2024. Amazon and eBay followed close behind, with Amazon overtaking eBay by late Q2 2025 after a dip earlier in the year.

Temu in Europe showed a steady upward trend, growing from ~5.2 searches per user to over 7.0 by Q2 2025. Meanwhile, Etsy and Zalando remained more modest in engagement, hovering in the 3–4 range throughout the period. Notably, the European market exhibits a flatter engagement curve across platforms, suggesting more evenly distributed usage behaviors.

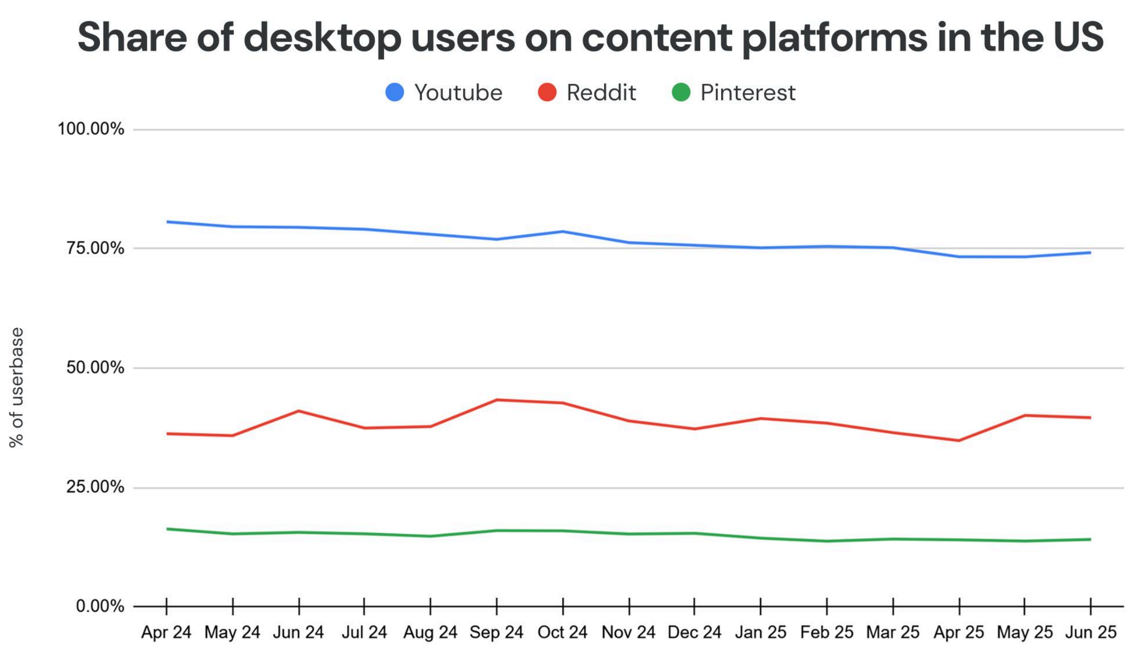
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

My marketing brain says that Temu can be ignored for most existing brands for now, but probably not for long. If they want to eventually follow Amazon's path to behemoth status (as Walmart, eBay, and Etsy did), they'll likely push ads as the primary revenue source and that means widening the brand's appeal and supplies. Even ten years ago, luxury products were never on Amazon. Today, it's a different story.

Content platforms search

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

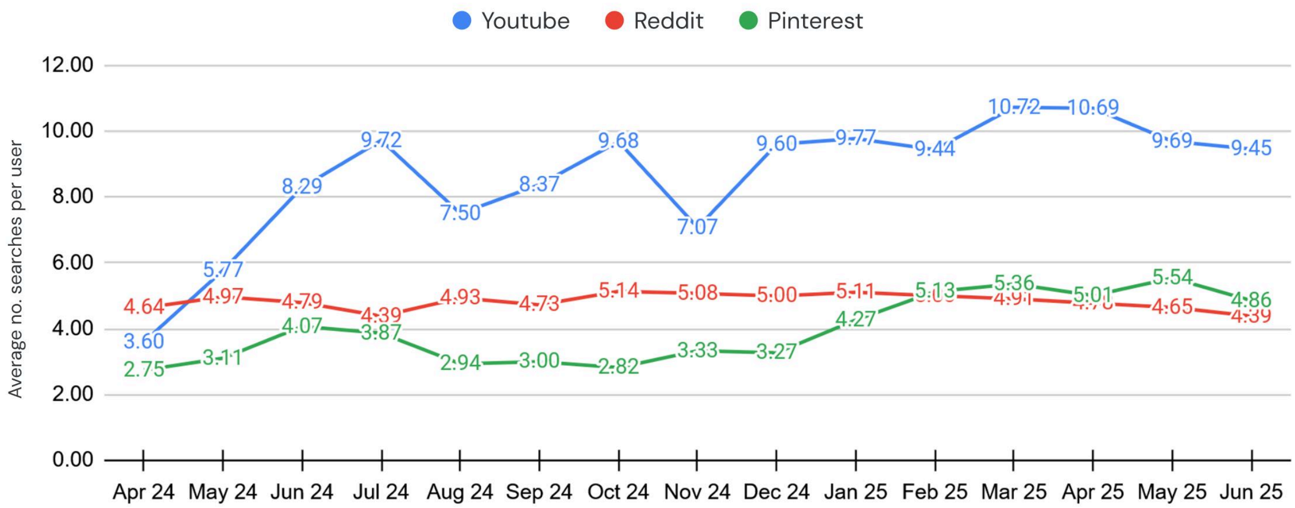


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

Source: Datos

Searches per US desktop searcher on content platforms

An over-time view of how many searches the average US desktop searcher performs on major social networks



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

SparkToro

Source: Datos

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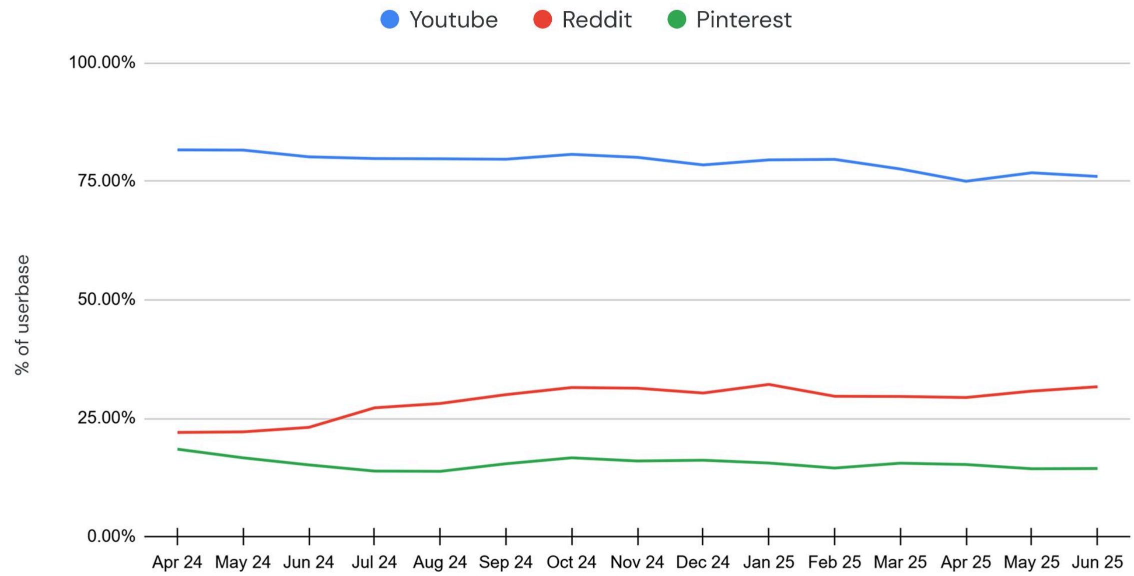
YouTube remained the most widely accessed content platform among US desktop users, with consistent reach above 70% throughout the year. Despite a flatline in early 2025, userbase share showed a slow decline, hovering near 75%. Search engagement was strong, maintaining the sharp lead YouTube took over Reddit after May 2024.

Reddit remained the second most-visited content platform, with minor fluctuations in both userbase share and average searches per user.

Pinterest stayed steady in userbase share and showed modest growth in engagement. While its overall user penetration hovered around 15%, search activity rose from 3.11 searches per user in May 2024 to 5.54 in May 2025, a near-doubling of search engagement.

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

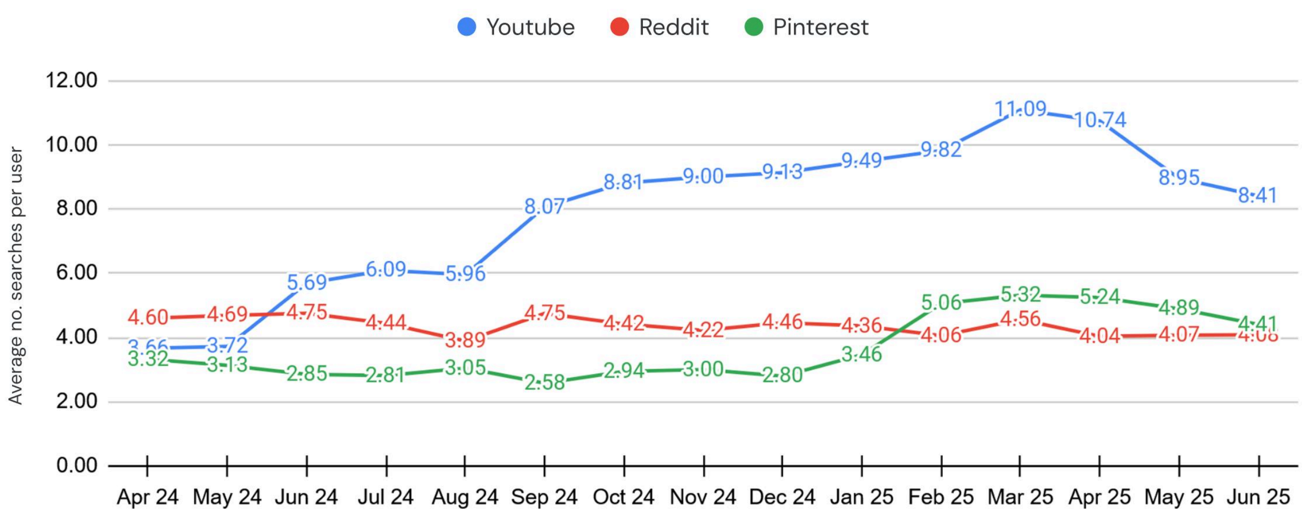


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

Source: Datos

Searches per EU & UK desktop searcher on content platforms

An over-time view of how many searches the average desktop EU + UK searcher performs on major social networks



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

Like in the US, YouTube remained on top, with a slight dip in userbase share, and an increase in engagement. Q2 2025 is significantly higher than Q2 2024, especially compared to the other two platforms.

Though Pinterest's overall user share held steady around 13–19%, its search intensity rose notably, peaking above 5 searches per user in Q2 2025 before slightly tapering in June. This suggests that engaged users are becoming more active searchers, even if audience growth stagnated.

Reddit saw a gradual increase in userbase, but the average number of searches per user remained flat across the year. This points to stable search behavior compared to YouTube or Pinterest.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

YouTube is, arguably, the second largest search engine in the world (behind only Google). But if we compared apples:apples, even for informational and commercial searches, it's possible that Reddit and Pinterest belong in the top 10 as well (and possibly Instagram as well). Future studies may let us get there, but if you're in marketing now, I'd take a close look at *your* audience and whether their search behavior might be happening even more on content and social platforms vs. traditional search or AI tools – you might be surprised.

Conclusion

Q2 2025 highlighted emerging trends and subtle shifts in user behavior across traditional and AI-driven search, rather than dramatic upheaval. Traditional search remains a cornerstone of online navigation, but its dominance continues to be reshaped by the rise of AI tools, shifting platform preferences, and evolving user intent.

Key Takeaways

AI gains further traction
While AI kept climbing in overall panel event share, ChatGPT maintained its lead in AI tool usage across both US and European markets and continues to grow. Gemini saw an uptick, with the opposite for Deepseek, and other tools holding steady.

Google retains search engine dominance – but fragmentation is real
Google's market share remains massive, but alternate engines like Bing, Yahoo, and DuckDuckGo continue to command loyal segments. Searcher behavior on these engines reveals intent differences, with Google users skewing toward informational queries and others showing more navigational and transactional patterns.

AI click behavior diverges from traditional search
Compared to classic search results, AI tool users are far more likely to visit programming, research, and niche application sites like GitHub, NIH, and Canva.

E-commerce platforms face mixed fortunes

Amazon remains the dominant force in desktop retail, but in both the US and Europe it saw softening visit share through early 2025. Meanwhile, players like Temu, Allegro, and eBay posted meaningful gains in either user reach or engagement, signaling a more competitive landscape across regions.

Content platforms show divergence in reach vs. engagement

YouTube continues to top both regions in user reach and search activity per user, but userbase share shows a slight downward trend in Q2. Reddit remains stable with slight userbase growth in Europe, while Pinterest showed a notable rise in search engagement (particularly in Europe) despite modest growth in audience.

As users shift between tools, platforms, and intent types, the boundaries between search, content, commerce, and AI continue to blur. Marketers, SEOs, and platform strategists alike will need to stay attuned; the ability to observe and act on these shifts are an important competitive advantage.

At Datos, we help you stay ahead by delivering real-world signals that reveal how people search, discover, and decide. Our goal is to equip you with the behavioral intelligence you need to make smarter, more informed decisions. Get in touch to talk to us about your goals and how Datos can help.

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sales@datos.live

media@datos.live

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

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14 Wall St 20th Floor, New York, NY 10005