

State of Search Q2 2026

Behaviors, Trends, and Clicks
Across the US & Europe





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Introduction

The conversation around search and AI continues to move at an extraordinary pace. Every week brings new product launches, platform updates, and predictions about the future. But beneath the headlines, how much is user behavior actually changing?

As always, this report is intended to separate measurable behavioral change from speculation, providing an evidence-based view of how search, AI, and digital discovery continue to evolve.

At Datos, 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 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 2025 to June 2026.

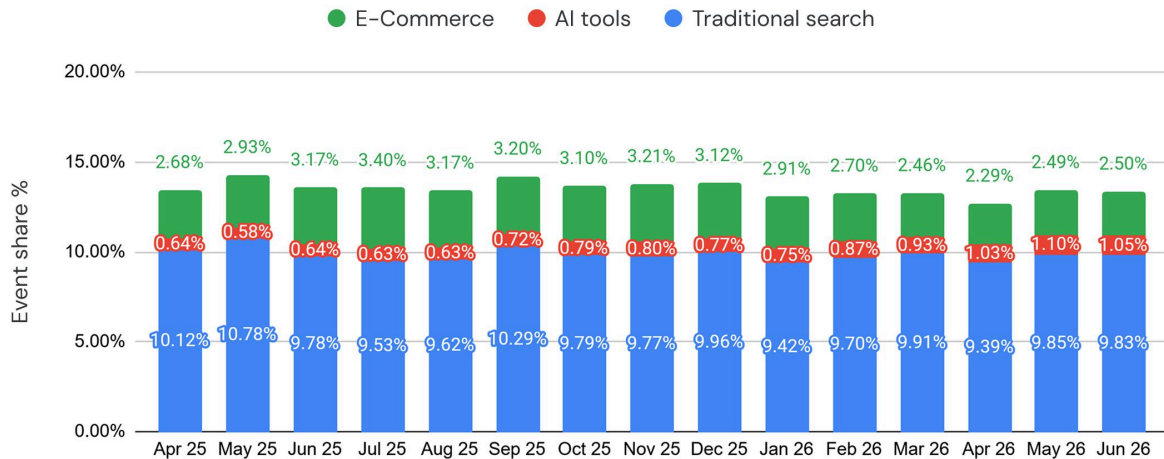
It includes:

- 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



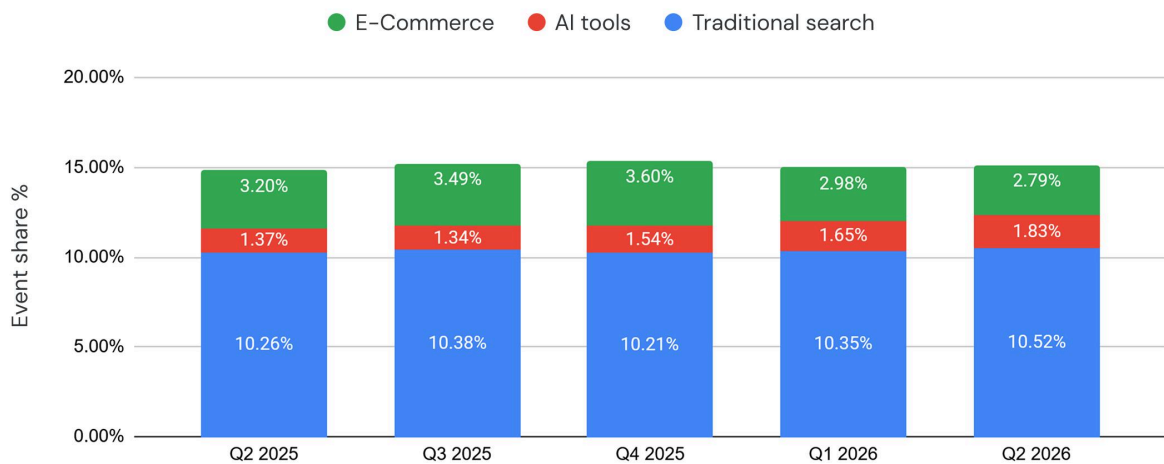
Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%

SparkToro

Source: Datos

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: Datos

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, AI tools remain the fastest-growing category, reaching 1.83% of desktop activity in Q2 2026, up from 1.37% in Q2 2025. Monthly data shows growth continued almost uninterrupted for over a year, with only a slight pause in June after peaking at 1.10% in May.

E-commerce continues to normalize after its Q4 holiday peak, declining to 2.79% in Q2 and remaining subdued throughout the quarter, with monthly activity holding around 2.3–2.5%.

Despite continued AI growth, traditional search continues to command the largest share of desktop activity by a considerable margin, rising slightly to 10.52% in Q2 2026.

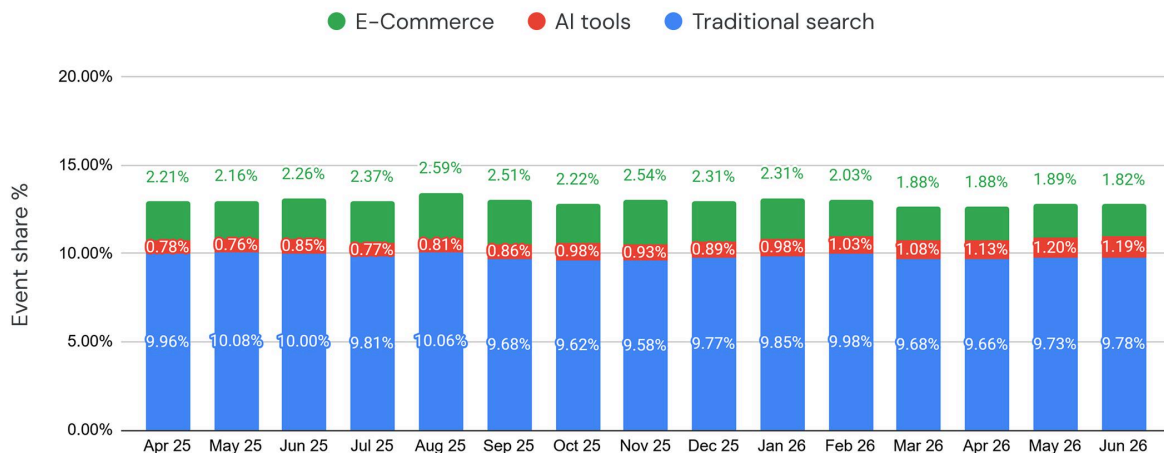
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



The slowdown in AI tool adoption in June is, granted, only a single month, but it's notable because we've only seen a couple declines in the last few years, and this one's bigger than the others. It could be a blip, or it could signal a plateauing in AI use. There's a tremendous amount of backlash and negative sentiment around AI outside the business and marketing worlds (and even inside them), but it's also possible that Google's rapid adoption of AI inside their results precludes the need to jump over to ChatGPT or Claude.

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%

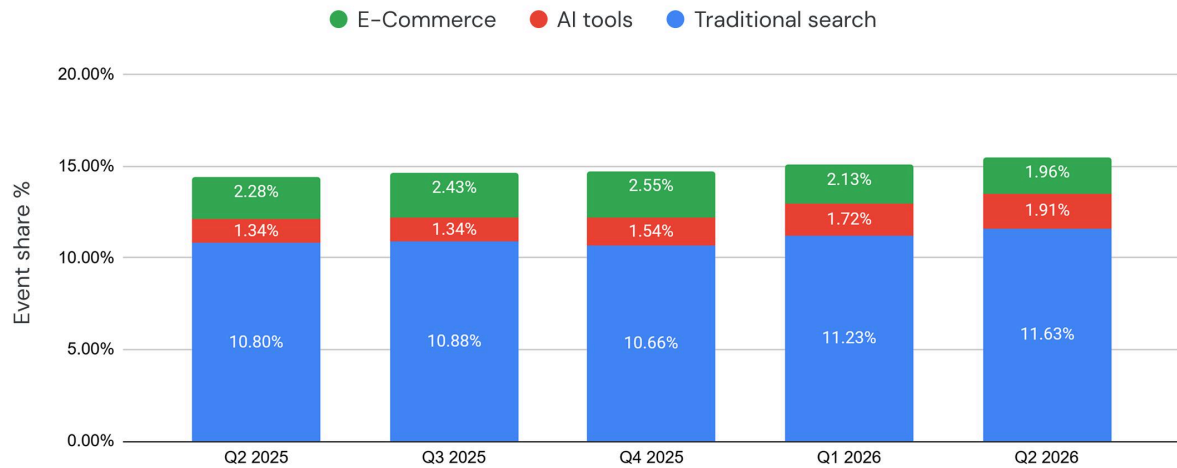


Source: Datos





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



Over in Europe, AI tools also continued their steady upward trajectory, reaching 1.91% of desktop activity in Q2 2026, up from 1.34% in Q2 2025. Monthly usage climbed almost continuously over the past year, with a slight easing in June after peaking at 1.20% in May, mirroring the US.

E-commerce activity appears to have stabilized at a lower level, declining to 1.96% in Q2 after its Q4 2025 peak. Monthly activity held between 1.82% and 1.89% throughout the quarter, suggesting the earlier decline has leveled off.

Traditional search continues to demonstrate remarkable stability, rising modestly to 11.63% in Q2 while monthly activity remained clustered around 9.7%.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

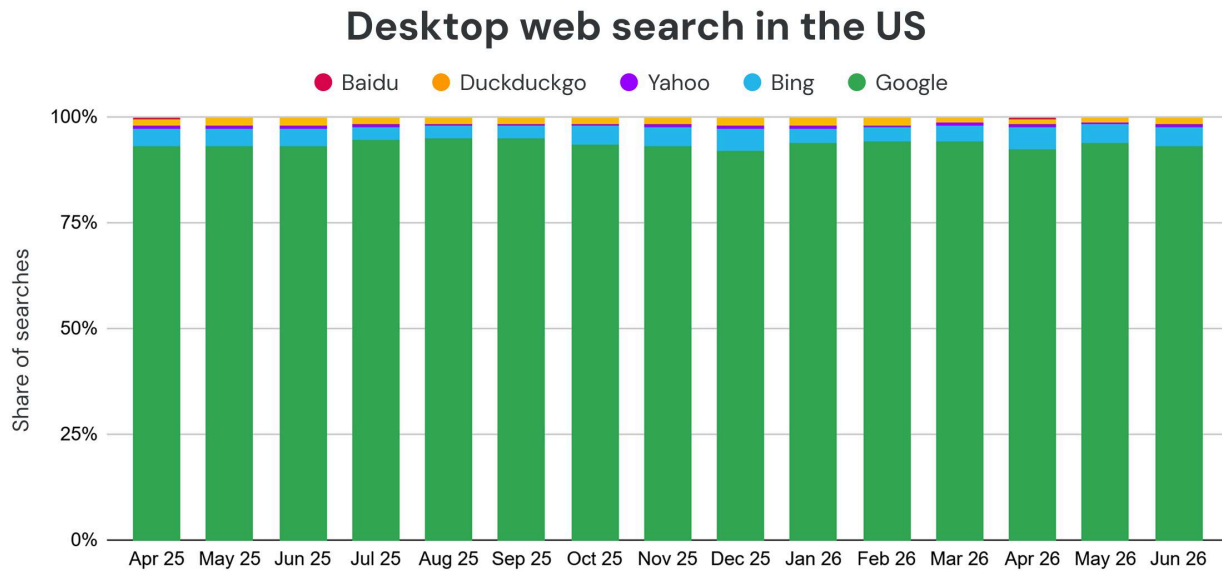


I mentioned the negative sentiment AI faces in the United States – according to surveys, that's even more pronounced in the EU, and there's more legislative action being taken to restrict, fine, and control AI use. Despite that, Europeans are adopting AI at higher rates, as they have been the last few years. Multiple theories exist, but education level is generally higher and poverty rates are lower than the US, and those demographics are likely drivers (more educated, wealthier people tend to use AI more heavily).



State of traditional search

A review of the performance of the five largest "traditional" (non-AI) search engines, tracking their progress from Q2 2025 through Q2 2026.



*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 all listed domains, during the month * 100%*



Source: Datos



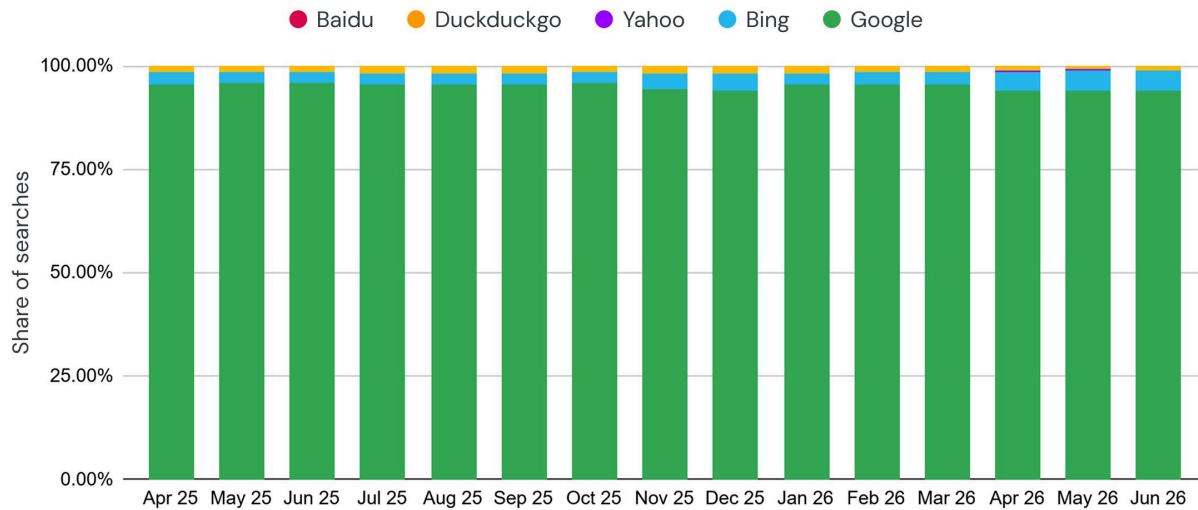
Google continues to dominate desktop search, maintaining a market share between 92.4% and 94.0% throughout the quarter.

Bing continues to show signs of gradual underlying growth, reaching 5.36% in April, its highest monthly peak to date and the third peak over the past year (4.34% in October 2025, 5.33% in December 2025, 5.36% in April 2026).

Yahoo, DuckDuckGo, and Baidu remain broadly stable, moving within their normal small ranges.



Desktop web search in the EU & UK



Share of Searches = $\frac{\text{Sum of unique searches per user per day on a given domain, during the month}}{\text{Sum of unique searches per user per day across all listed domains, during the month}} * 100\%$

SparkToro

Source: Datos

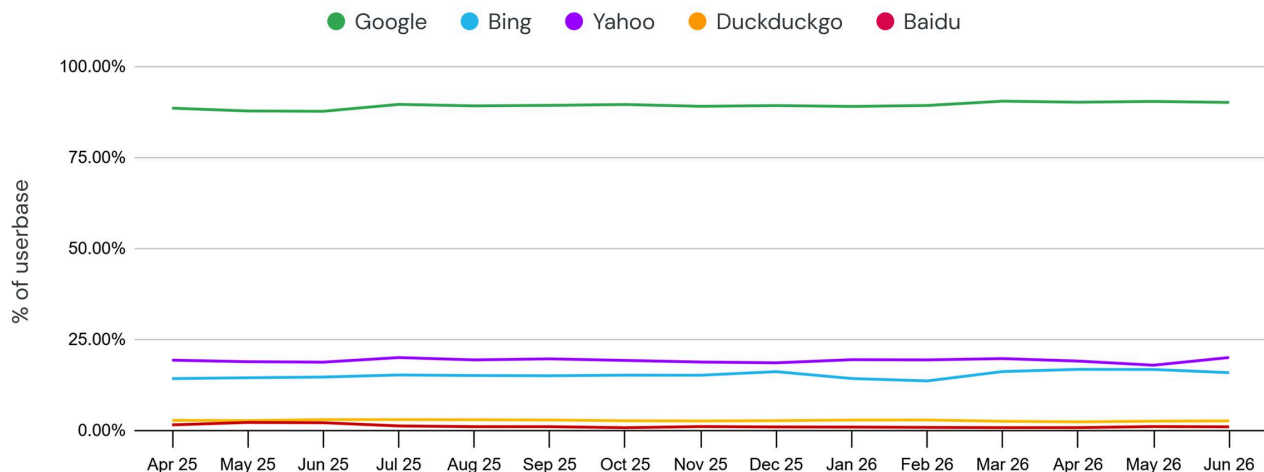
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In the EU/UK, patterns broadly reflect those in the US. Google maintains an overwhelming lead in desktop search, holding a market of at least 94.0% throughout Q2. While still dominant, its share remains slightly below the 95–96% levels seen for much of 2025.

Bing continues to show signs of gradual growth, reaching 4.97% in May, its highest monthly peak to date. Like in the US, while monthly share remains volatile, the broader trend suggests incremental gains.

Yahoo, DuckDuckGo, and Baidu remain niche players, showing no meaningful shift in market position.

Share of desktop web search users in the US



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

SparkToro

Source: Datos

Datos
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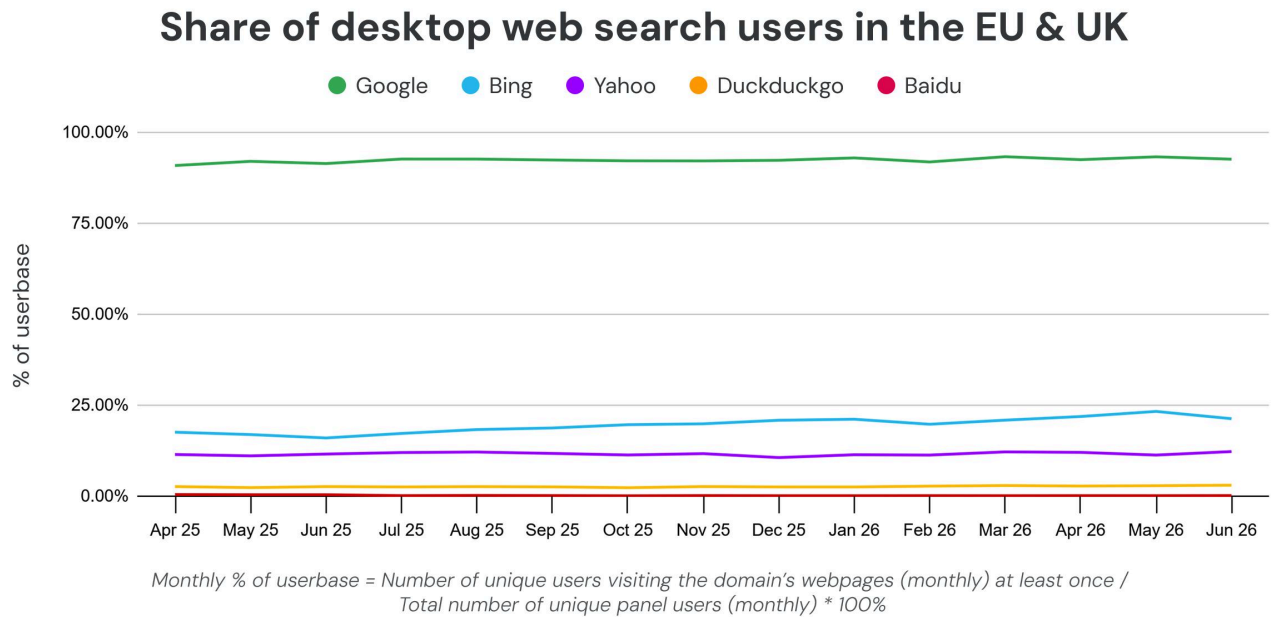


Google's user base rose from 87.87% in June 2025 to 90.21% by June 2026. While the increase seems small, a gain of nearly two percentage points is significant at Google's scale.

Bing also continued its upward trend, growing from 14.4% to 16.0% of desktop search users over the past year, reinforcing the gradual gains seen in search market share.

DuckDuckGo continued to lose users, remaining well below its mid-2025 peak and extending a gradual downward trend throughout the year.

Yahoo and Baidu remained broadly stable.



SparkToro

Source: Datos

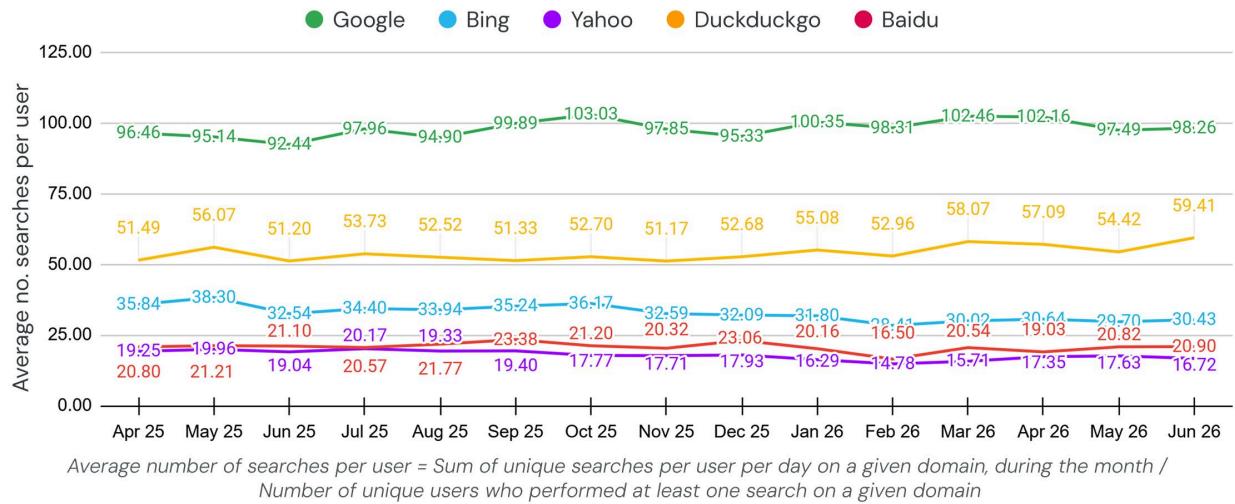
Datos
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Bing recorded the strongest growth in user share, climbing from 16.1% in June 2025 to 21.37% in June 2026 (with a peak of 23.4% in May 2026). The sustained increase represented the most significant shift among desktop search engines over the past year.

All other search engines tracked little meaningful changes in user share over the period, with Google remaining dominant.



Searches per US desktop searcher



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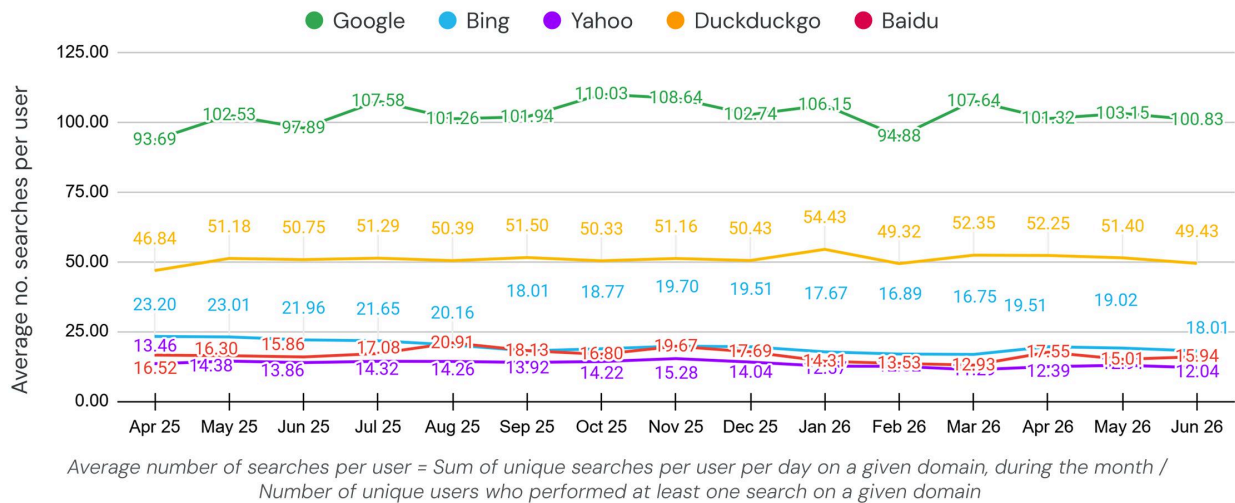
Source: Datos

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Bing and Yahoo both recorded sustained declines in search intensity over the past year. Bing fell from a peak of 38.3 searches per user in May 2025 to 28–32 throughout 2026, while Yahoo declined from a 17.7–21.8 range in 2025 to 14.8–17.6 in 2026.

DuckDuckGo reached a new series high of 59.4 searches per user in June. Google and Baidu remained broadly stable.

Searches per EU & UK desktop searcher



SparkToro

Source: Datos

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Like in the US, Bing and Yahoo both recorded sustained declines in search intensity. Bing fell from a peak of 23.2 searches per user in April 2025 to 16.8–19.5 throughout 2026, while Yahoo declined from a 13.5–15.3 range in 2025 to 11.3–12.9 in 2026.

Google, DuckDuckGo and Baidu continued to show modest month-to-month volatility, but without a clear long-term trend.

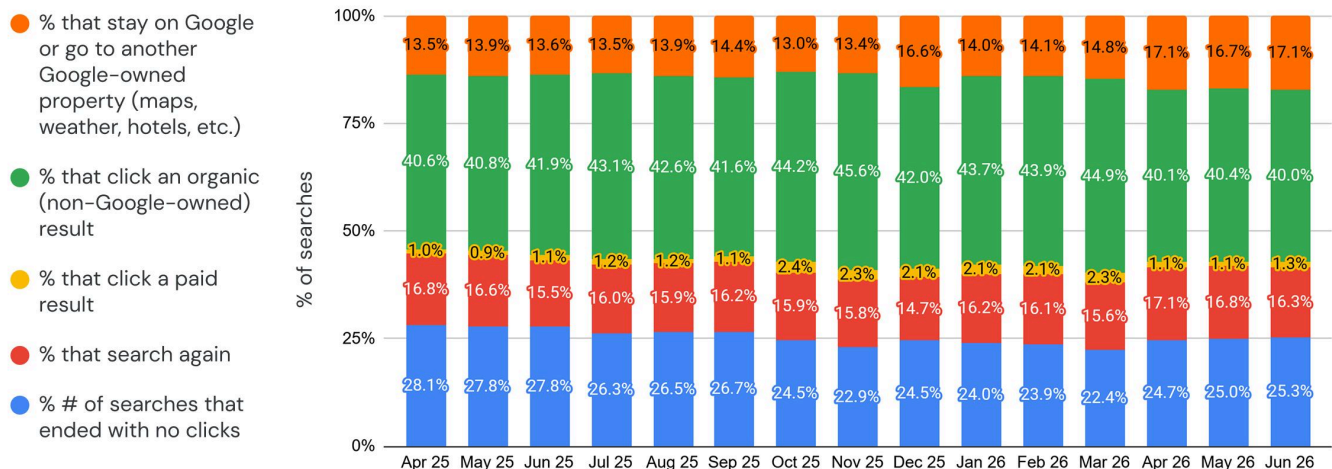
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



It's somewhat surprising to see that DuckDuckGo's press mentions and PR campaign against AI-driven results haven't resulted in more competition. Apparently big search days and notable media coverage doesn't translate into long-term searchers. Google's domination, of course, is no surprise, but searchers/searcher is always the one I watch. So far, no dip (other than the usual seasonality decline of summer), indicating AI, social search, and competitors are having little to no impact on their usage.

Distribution of Google US desktop search clicks over time



Source: Datos



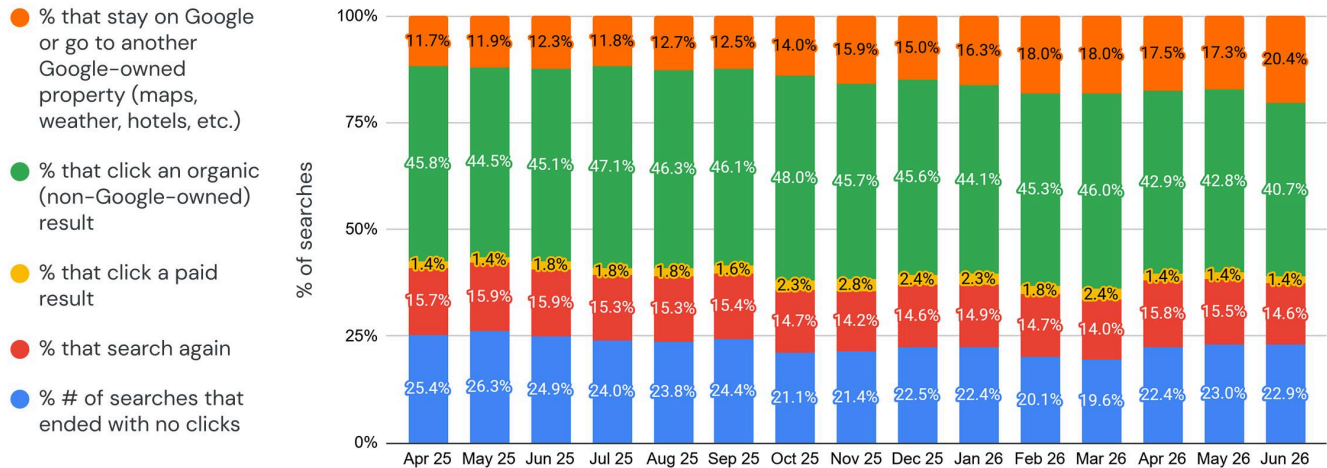
Zero-click searches increased during Q2, rising from 24.7% in April to 25.3% in June, but still tracking below last June's 27.8%.

Organic click-through declined, falling from 44.9% in March to 40.0% by June, its lowest level since April 2025.

Paid clicks also fell to similar levels as last year's, while clicks to Google-owned properties rose, increasing from 14.8% in March to 16.7–17.1% during Q2.



Distribution of Google EU & UK desktop search clicks over time



Source: Datos



Clicks to Google-owned properties continued their sustained upward trend, rising from 11.7% in April 2025 to a new high of 20.4% in June 2026 – a gain of nearly 9 percentage points.

Organic click-through rates weakened during Q2, falling from 46% in March to 40.7% in June.

Paid click share declined, settling at 1.4% in April, May, and June, down from the 1.8–2.4% range seen during Q1, though almost matching the same period in 2025.

Zero-click search share is not declining the way the earlier data suggested, oscillating over the last 15 months and showing no clear trend. Meanwhile search-again rates fluctuated within their established ranges.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



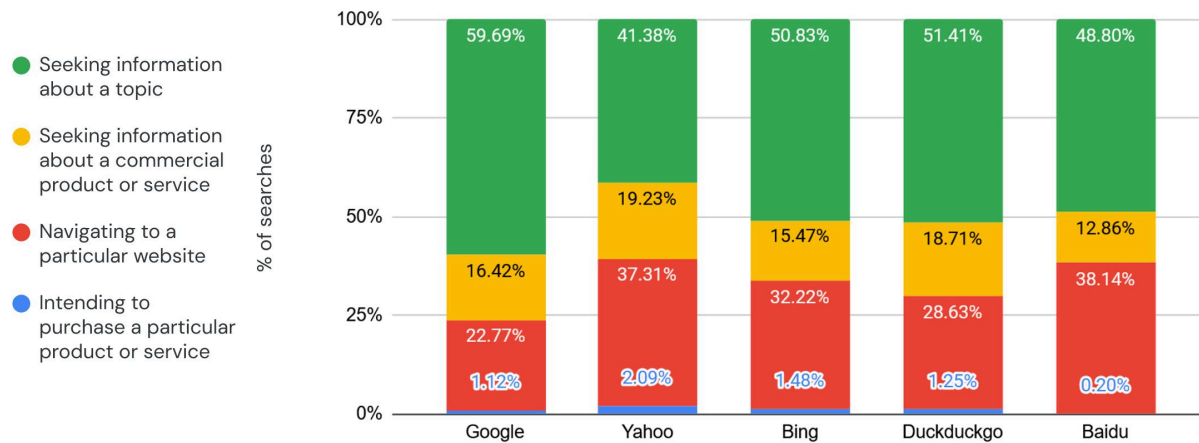
The number I like least, and the one that should frustrate every proponent of the open web is June's record low of clicks to non-Google-owned properties. This is desktop search, where more clicks are supposed to happen, and more opportunity is supposed to exist for sites that aren't just Alphabet properties... C'est la vie.



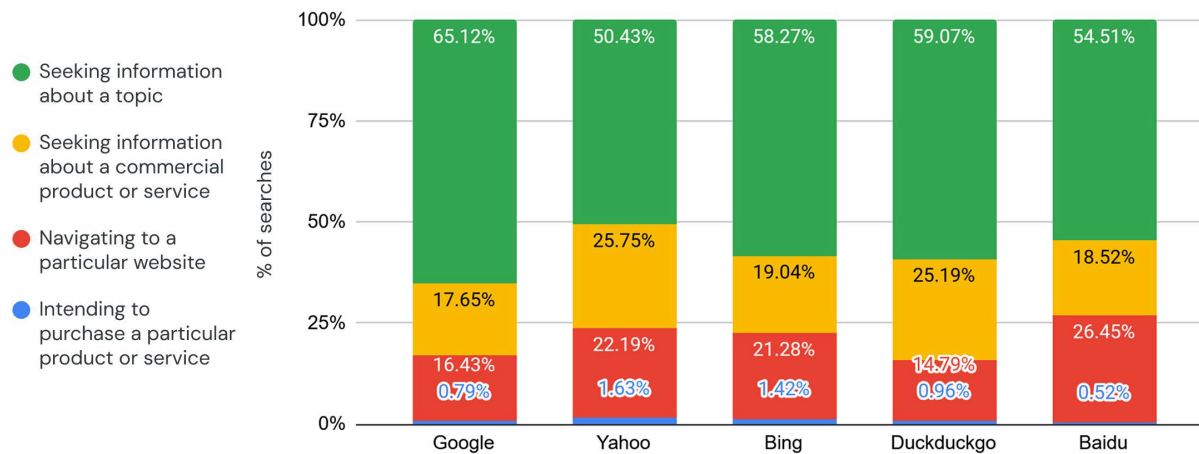
Search intent

The following charts compare desktop search intent across major search engines between Q2 2025 and Q2 2026.

Categorization of US desktop search intent in Q2 2025



Categorization of US desktop search intent in Q2 2026



Source: Datos



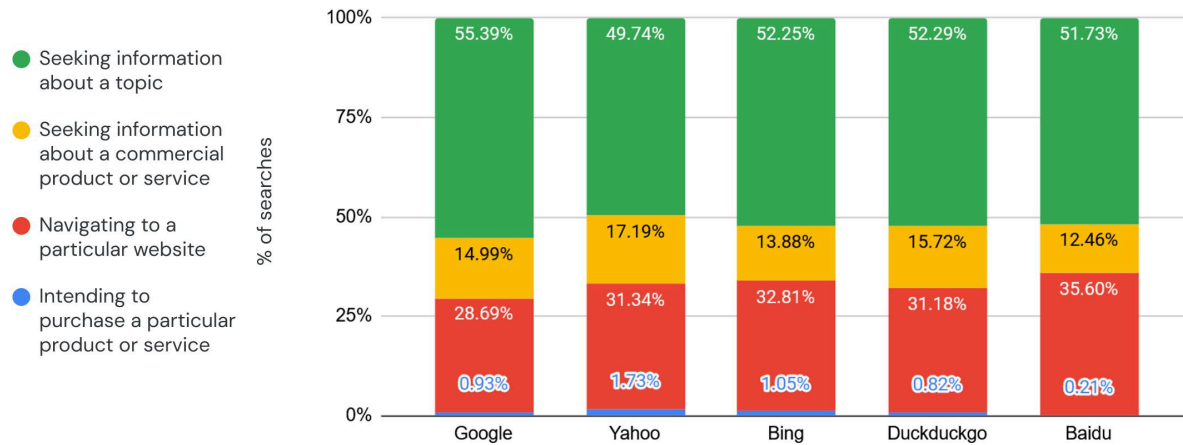
Navigational searches declined across every search engine, with the largest drops recorded on Yahoo (37.3% to 22.2%), DuckDuckGo (28.6% to 14.8%), Baidu (38.1% to 26.5%), and Bing (32.2% to 21.3%). Google also saw a decline, falling from 22.8% to 16.4%.

Informational intent increased across all five engines, accompanied by consistent gains in commercial research queries.

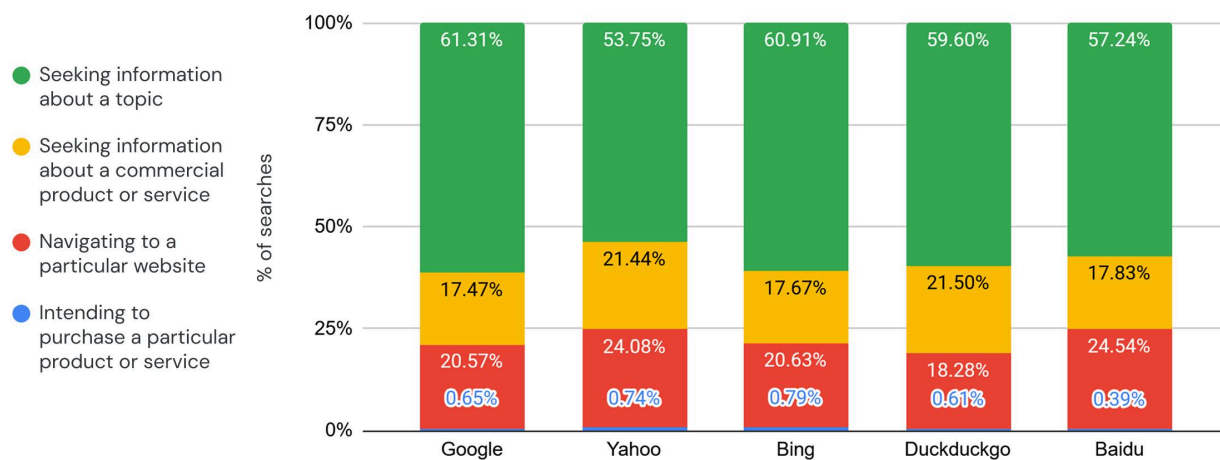
Purchase intent remained minimal, accounting for less than 2.1% of searches across every engine in both years, with only minor fluctuations.



Categorization of EU & UK desktop search intent in Q2 2025



Categorization of EU & UK desktop search intent in Q2 2026



SparkToro

Source: Datos

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Navigational searches declined across every search engine, with the largest decreases recorded on Bing (32.8% to 20.6%), DuckDuckGo (31.2% to 18.3%), and Baidu (35.6% to 24.5%). Google and Yahoo also saw notable declines, falling to 20.6% and 24.0%, respectively.

Informational intent increased across all five engines, led by Bing (52.3% to 60.9%) and DuckDuckGo (52.3% to 59.6%). Across every search engine, the share of commercial research queries increased, while the share of navigational queries decreased, reflecting a shift in the distribution of search intent.

Purchase intent remained negligible, accounting for less than 1.8% of searches across every engine in both years, with only minor fluctuations.

In both regions, consistency of these patterns across all five search engines points to a broader shift in user behavior, with users increasingly turning to search to learn and research rather than navigate directly to known websites.



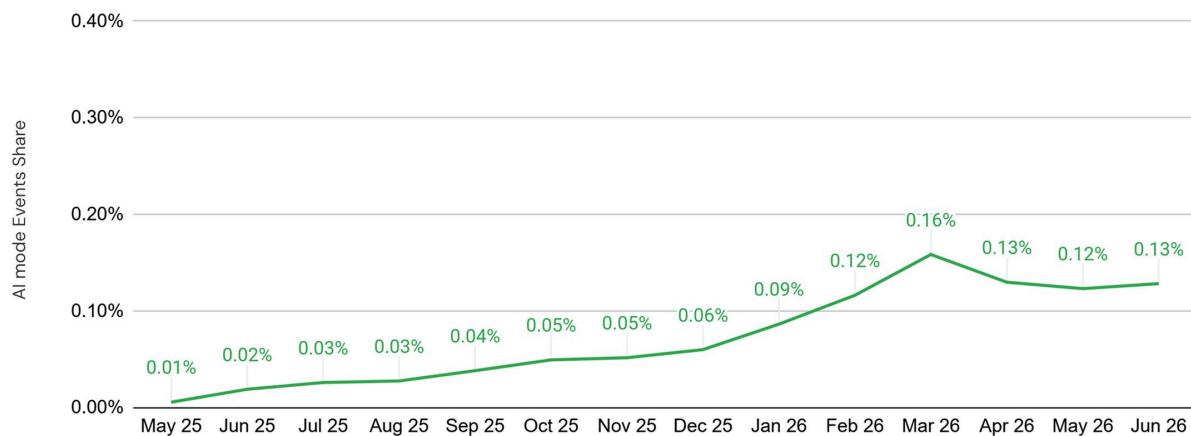
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



The trend toward informational and commercial searches and away from navigational ones is surprising given the loss of clicks to the open web. This might be AI Overviews (and AI answers of other kinds from the other search engines) becoming bigger use-cases for searchers, as they learn that the top of Google has become a very reasonable substitute for ChatGPT/Claude.

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



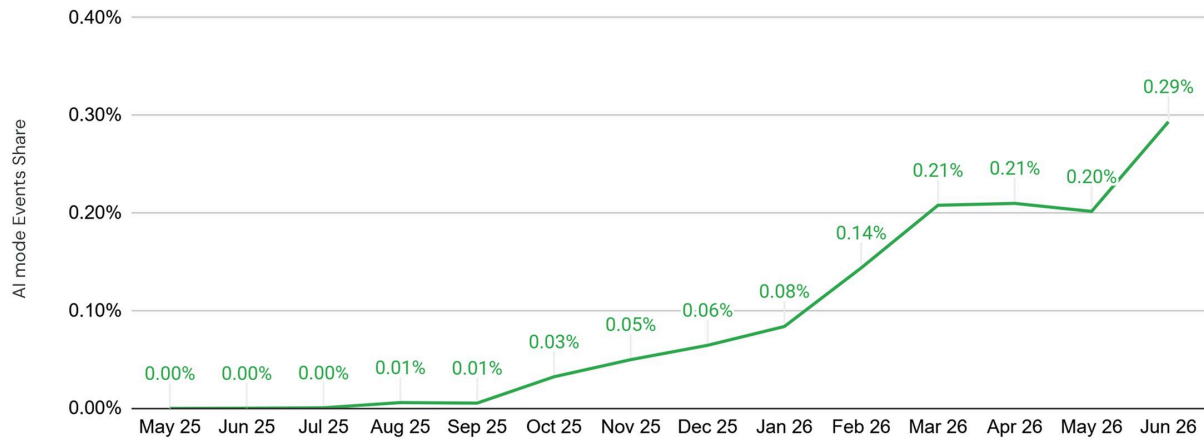
Source: Datos



Google AI Mode adoption stabilized during Q2 after accelerating rapidly in Q1. Following a peak of 0.16% of desktop activity in March, usage settled between 0.12% and 0.13% through June, suggesting an early plateau rather than a reversal. Despite the pause, AI Mode usage remained well above late-2025 levels.



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 Europe, Google AI Mode adoption remained ahead of the US, despite launching later in the region. Adoption continued to accelerate during Q2, reaching a new high of 0.29% of desktop activity in June. After holding steady at 0.2% in March and April, growth resumed through the end of the quarter.



Top US search destination domains Q2 2025 – Q2 2026

After a search, which domains were most often visited? This next section lists the top 15 domains, comparing Q2 2025 with Q2 2026.

Top domains visited from US desktop traditional search engines

Q2 2025		Q2 2026	
1 Youtube	9 Chatgpt	1 Youtube	9 Tiktok
2 Reddit	10 Linkedin	2 Reddit	10 Linkedin
3 Amazon	11 Ebay	3 Amazon	11 Microsoft
4 Facebook	12 X	4 Facebook	12 Github
5 Wikipedia	13 Google	5 Wikipedia	13 X
6 Instagram	14 Steampowered	6 Instagram	14 Ebay
7 Microsoft	15 Walmart	7 Chatgpt	15 Imdb
8 Tiktok		8 Fandom	

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

Source: Datos



Core destinations remain unchanged

- ✓ The top of the ranking remained stable, with YouTube, Reddit, Amazon, Facebook, Wikipedia, and Instagram all retaining the top six positions.

AI gains visibility in search journeys

- ✓ ChatGPT climbed from #9 to #7, making it the largest upward mover among the top-ranked destinations.
- ✓ At the same time, Google dropped out of the top 15 and Microsoft fell from #7 to #11.



Shopping traffic consolidates

- ✓ Amazon held its #3 position, while eBay fell from #11 to #14 and Walmart exited the top 15.
- ✓ The changes suggest search-driven shopping traffic became increasingly concentrated around Amazon

Entertainment destinations diversify

- ✓ Fandom and IMDb entered the top 15, replacing Steam as well as other lower-ranked destinations.
- ✓ This points to a broader mix of entertainment and fan-content sites attracting users from search.

Social platforms saw limited change

- ✓ TikTok and X each slipped by one position, while Facebook, Instagram, and LinkedIn remained broadly stable.
- ✓ Overall, the rankings suggest only minor shifts in social platform visibility from traditional search.

E-commerce holds visibility

- ✓ Amazon held steady in the top 5, while eBay remained in the top 15
- ✓ These changes indicate strong integration of commerce platforms into search-driven journeys.



Top European search destination domains Q2 2025 – Q2 2026

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

Q2 2025		Q2 2026	
1 Youtube	9 Tiktok	1 Youtube	9 Tiktok
2 Reddit	10 Steampowered	2 Reddit	10 Fandom
3 Facebook	11 Openai	3 Wikipedia	11 LinkedIn
4 Microsoft	12 X	4 Facebook	12 Github
5 Instagram	13 LinkedIn	5 Amazon	13 Steampowered
6 Amazon	14 Canva	6 Instagram	14 Pinterest
7 Wikipedia	15 Github	7 Chatgpt	15 Imdb
8 Chatgpt		8 Microsoft	

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

Source: Datos



Knowledge and information sources gained visibility

- ✓ Wikipedia climbed from #7 to #3, overtaking several social and technology platforms to become one of the leading destinations from traditional search.

Social platforms softened overall

- ✓ Facebook, Instagram, and X all declined in the rankings, with X dropping out of the top 15 entirely, while TikTok held steady at #9.
- ✓ Unlike the US, the changes point to a broader softening in social platform visibility rather than movement by individual platforms.

AI maintained its position

- ✓ ChatGPT remained one of the leading AI destinations, edging up just one position from #8 to #7 (with openai.com's separate listing disappearing from the top 15 as its traffic consolidated onto the chatgpt.com domain over the same period).



- ✓ The relatively small change suggests AI maintained its visibility within traditional search rather than seeing another major step forward.

Professional and developer platforms gained ground

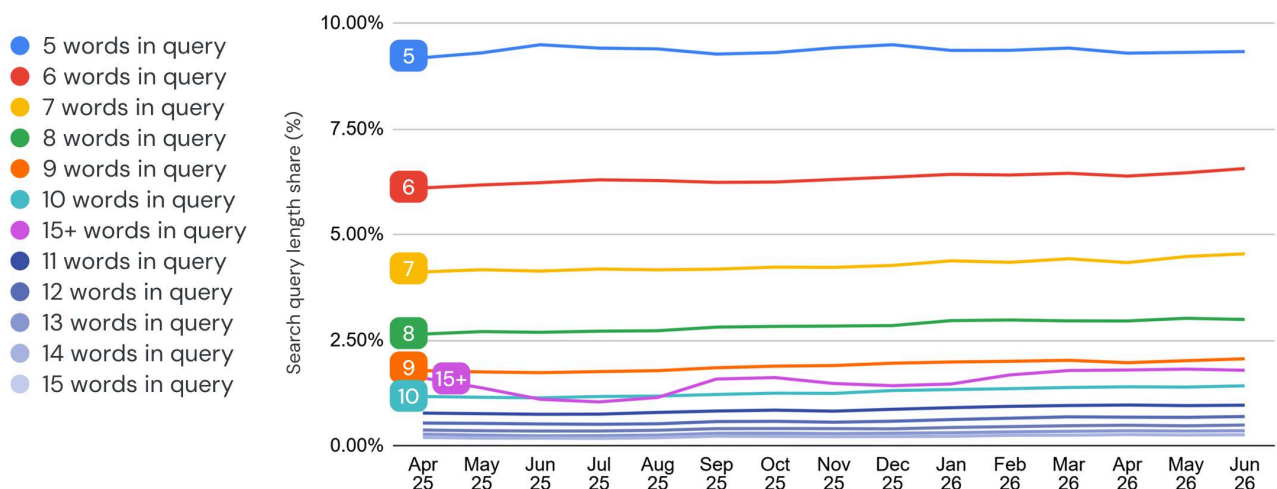
- ✓ GitHub and LinkedIn both climbed the rankings, while Microsoft fell from #4 to #8 and Canva dropped out of the top 15.
- ✓ The changes point to growing visibility for professional and developer-focused destinations relative to broader consumer technology platforms.

Entertainment destinations diversified

- ✓ Fandom, Pinterest, and IMDb entered the top 15, while Steam fell from #10 to #13.
- ✓ The rankings suggest users were directed to a broader mix of entertainment, fan, and lifestyle content from traditional search.

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



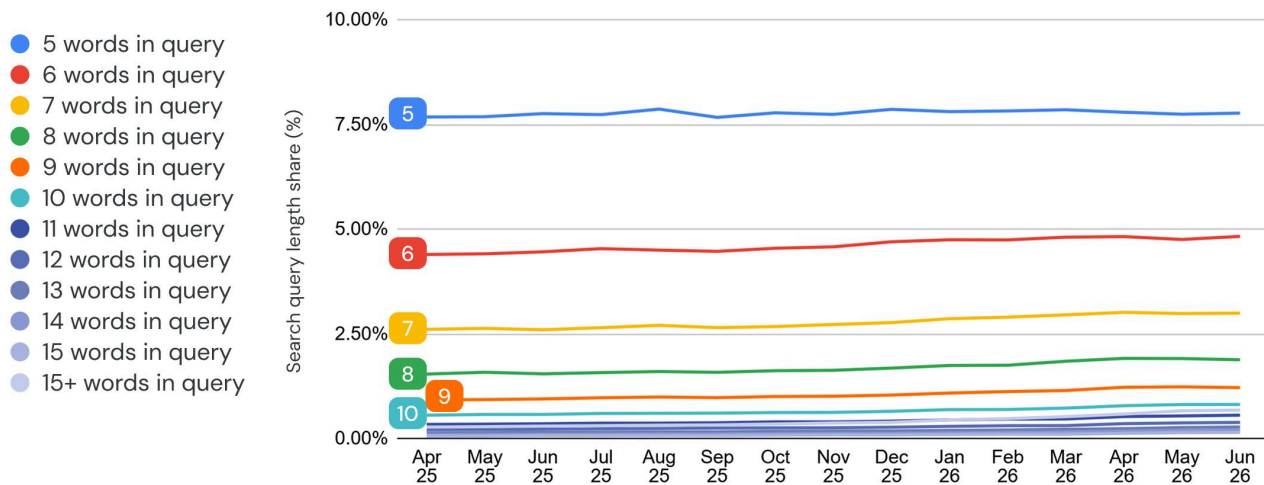


Mid-length queries continued to grow, with 6- and 7-word searches extending their upward trend for a fourth consecutive quarter. By June, 6-word queries reached 6.57%.

Short queries remained stable, with 5-word searches holding around 9.3% throughout the quarter.

Very long queries (15+ words) stabilized after rebounding in Q1.

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



Similar to the US, mid-length queries continued to edge upward, with 6-, 7-, and 8-word searches all increasing during Q2.

Very long queries (15+ words) continued to grow, rising from 0.53% in March to 0.69% in June. Unlike in the US, the longest queries showed continued momentum.

Short queries remained stable, with 5-word searches holding between 7.75% and 7.80% throughout the quarter.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



The query length speaks to the EU's more aggressive adoption of AI – they're figuring out that Google can serve as a solid substitute for an AI tool, and that's reflected in both the AI mode usage growth and the longer queries... At least, that's my guess!



Key takeaways for traditional search

✓ Traditional search remained resilient despite continued AI growth

Across the US and EU & UK, traditional search maintained a stable share of desktop activity throughout Q2. While AI usage continued to rise, search remained by far the largest driver of online discovery.

✓ Google retained users within its ecosystem

Visits to Google-owned properties continued to increase following searches, particularly in the EU & UK, highlighting Google's growing ability to keep users within its own ecosystem even as search behavior evolves.

✓ AI continued to complement rather than replace search

Google AI Mode continued to expand from a low base, while AI tools maintained steady growth. The data suggests AI is augmenting traditional search journeys rather than displacing them.

✓ Search behavior continued shifting toward research-oriented queries

Across both regions, informational and commercial searches increased while navigational intent declined across every major search engine. Users also continued adopting longer, more detailed queries, pointing to an ongoing evolution in how they search.

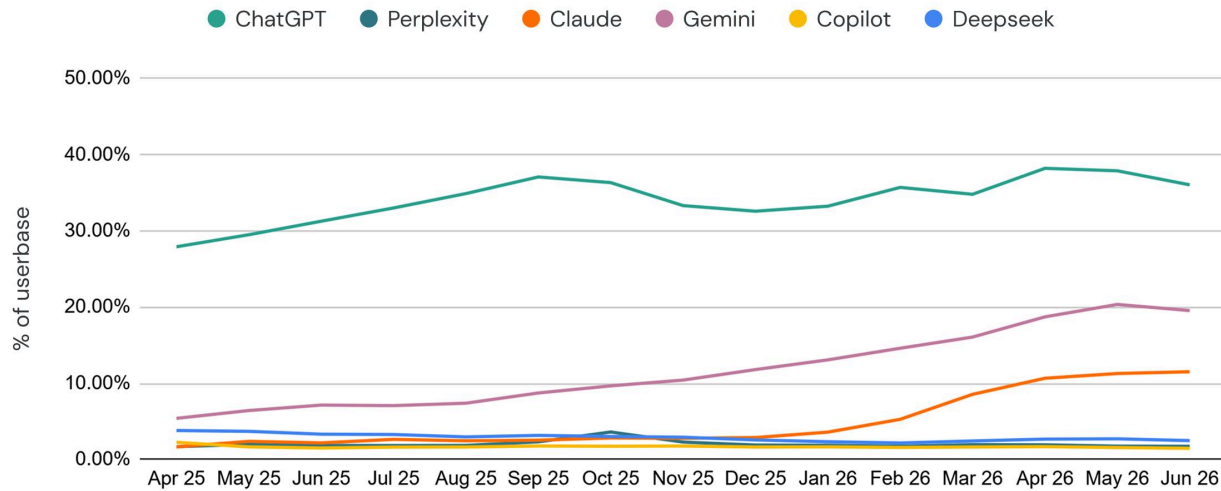
✓ Search destinations remained remarkably stable

Despite changes in AI, the leading destinations from traditional search remained largely unchanged. Content, commerce, and knowledge platforms continued to dominate, with only gradual shifts in rankings rather than widespread disruption.



State of AI search

Share of desktop users using AI in the US



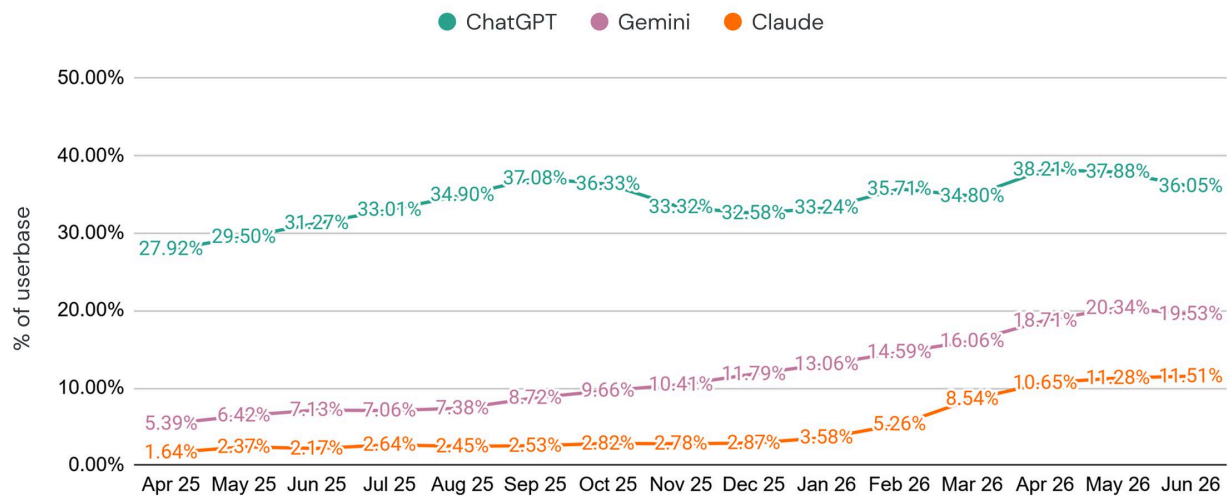
Monthly % of userbase = $\frac{\text{Number of unique users visiting the domain's webpages (monthly) at least once}}{\text{Total number of unique panel users (monthly)}} \times 100\%$

SparkToro

Source: Datos

Datos
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Share of desktop users using AI in the US



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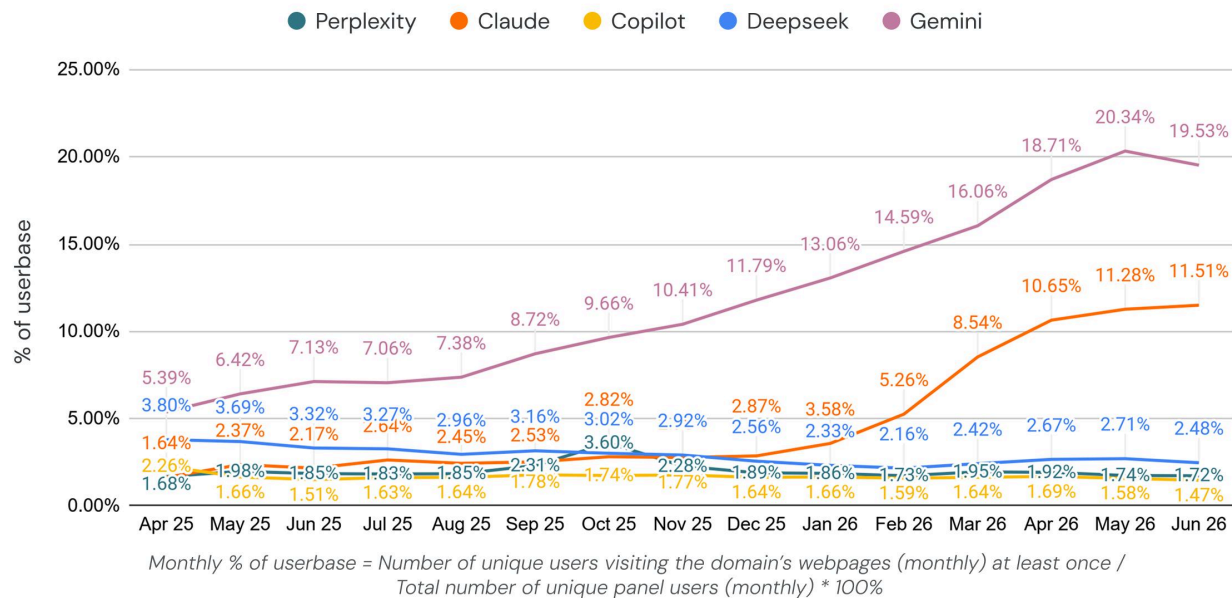
SparkToro

Source: Datos

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Share of desktop users using AI in the US



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Source: Datos

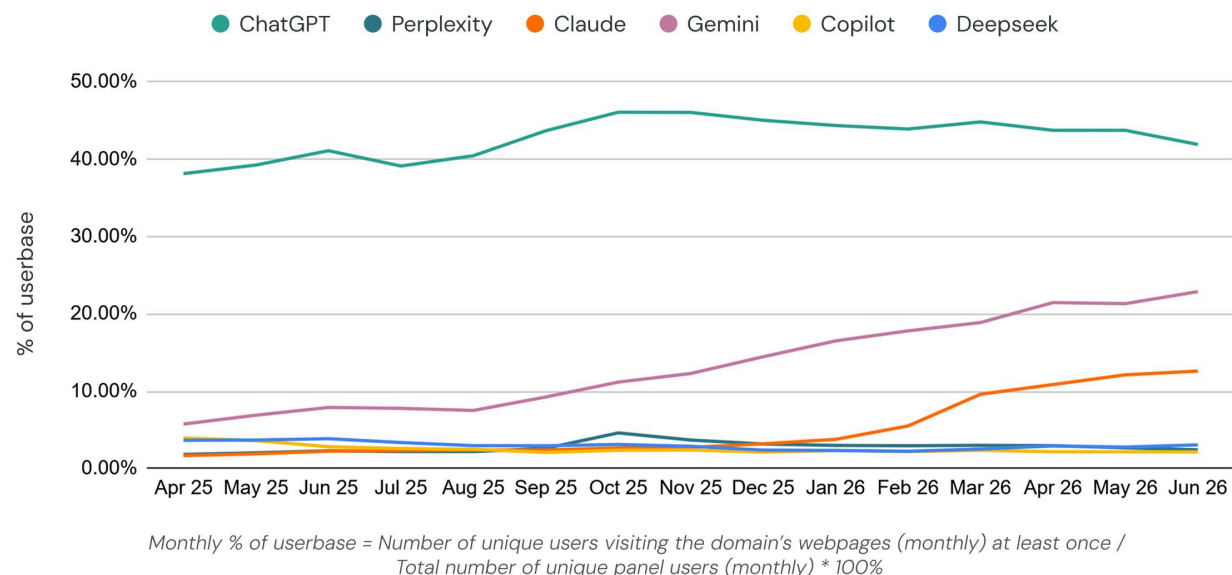
Datos
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Gemini and Claude recorded the strongest growth during Q2, with Claude rising from 8.54% in March to 11.51% in June, while Gemini reached a peak of 20.34% in May before easing slightly to 19.53% in June.

ChatGPT remained the clear market leader, holding a user share in the mid-30% range throughout the quarter. Despite growing competition, its user base remained broadly stable, suggesting the market continued to expand rather than users shifting away from ChatGPT.

Perplexity, Copilot, and DeepSeek remained niche players, maintaining low single-digit user shares with no meaningful changes during Q2.

Share of desktop users using AI in the EU & UK



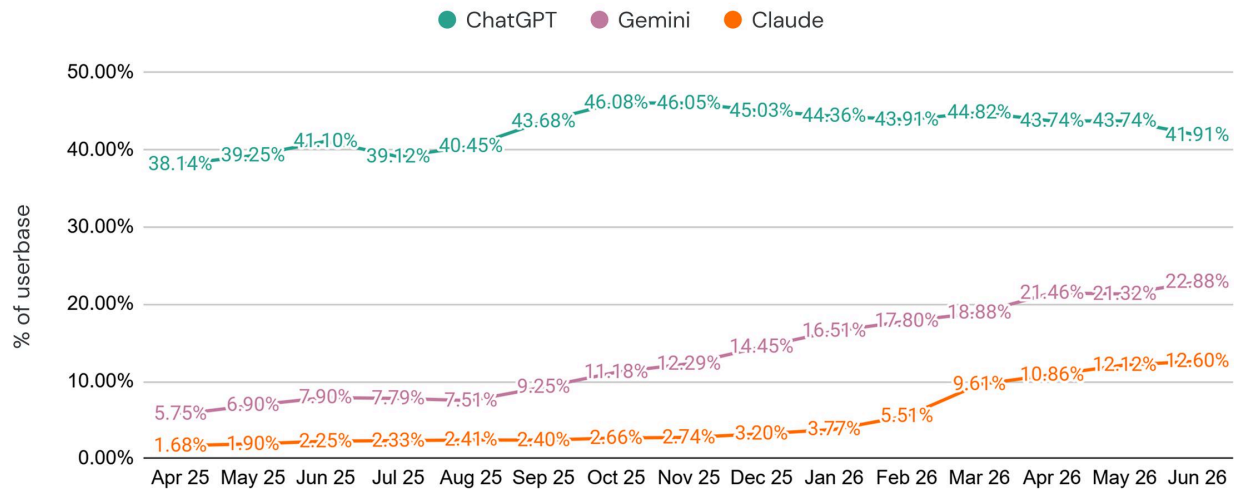
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Source: Datos

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Share of desktop users using AI in the EU & UK



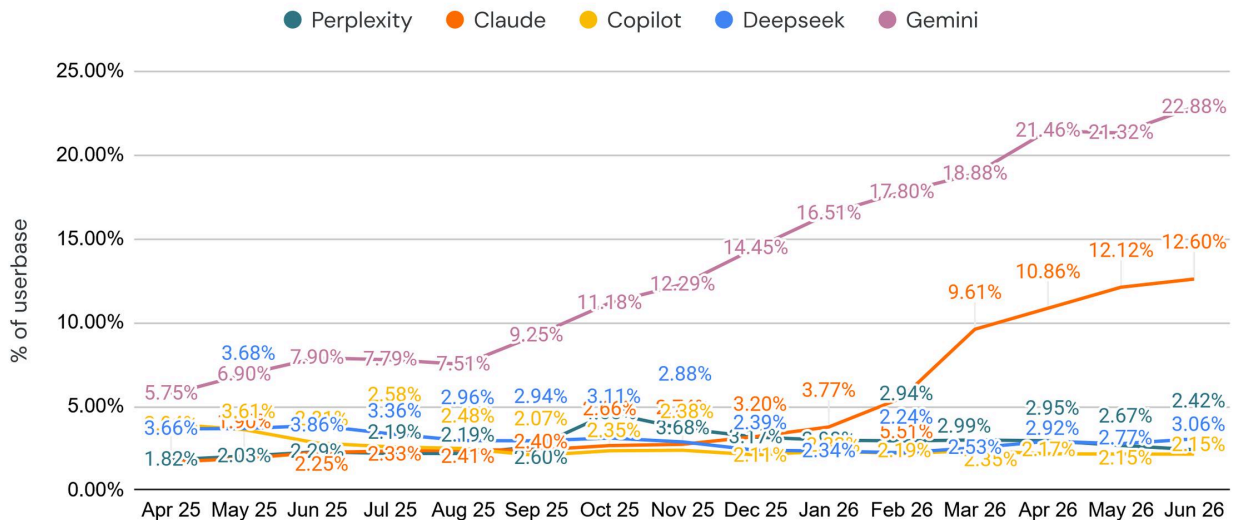
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SparkToro

Source: Datos

Datos
A Semrush Company

Gemini and Claude continued to gain momentum, with Claude growing from 9.61% in March to 12.60% in June, while Gemini reached a new high of 22.88% by the end of the quarter.

ChatGPT remained the leading AI platform, but unlike in the US, its user share declined from 44.82% in March to 41.91% in June.

DeepSeek overtook Perplexity for the first time, finishing the quarter with a higher user share than both Perplexity and Copilot, while the latter two remained broadly stable.



Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



OpenAI and their investors should be worried. Claude and Gemini are formidable competitors, and both have B2B niches that are likely far more valuable users of tokens and data in the long-run. It might be the case that years from now, ChatGPT is the “consumer” portal to AI, while professionals run on the perceived-to-be-more-advanced (and at least, more specialized) platforms.

Top US AI destination domains Q2 2025 – Q2 2026

Top domains visited from US desktop AI tools

Q2 2025		Q2 2026	
1 Google	9 Linkedin	1 Google	9 Claude
2 Youtube	10 Chatgpt	2 Youtube	10 Reddit
3 Github	11 Facebook	3 Microsoft	11 Canva
4 Amazon	12 Canva	4 Chatgpt	12 Linkedin
5 Microsoft	13 Bing	5 Github	13 Apple
6 Reddit	14 Deepseek	6 Gemini	14 Whatsapp
7 Wikipedia	15 Instagram	7 Facebook	15 Nih
8 Nih		8 Amazon	

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

Source: Datos



AI assistants became core destinations

- ✓ Other AI platforms gained significant visibility within AI-driven browsing journeys, with ChatGPT climbing from #10 to #4, while Gemini (#6) and Claude (#9) entered the top 10. Together, AI assistants occupied three of the top 10 positions, compared with one a year earlier.
- ✓ The shift suggests users increasingly moved between AI tools rather than treating them as isolated destinations.



Knowledge resources lost prominence

- ✓ Wikipedia dropped out of the top 15, while NIH fell from #8 to #15.
- ✓ The rankings suggest users were less likely to navigate from AI tools to traditional reference sites than they were a year earlier.

Technology destinations shifted

- ✓ Microsoft climbed from #5 to #3, while Bing dropped out of the top 15.
- ✓ The change points to stronger visibility for Microsoft's broader ecosystem, even as its search product became less prominent as an AI destination.

Social and commerce platforms diverged

- ✓ Facebook climbed from #11 to #7, while Reddit fell from #6 to #10. Meanwhile, Amazon declined from #4 to #8, despite remaining a leading destination in traditional search.
- ✓ These shifts suggest referral patterns from AI tools differ from those seen in traditional search.

New consumer platforms entered the ranking

- ✓ Apple and WhatsApp entered the top 15 for the first time.
- ✓ Their arrival reflects a broadening mix of consumer destinations being accessed from AI tools.



Top European AI destination domains

Top domains visited from EU & UK desktop AI tools

Q2 2025

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

Q2 2026

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

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

Source: Datos



AI assistants rose in ranking

- ✓ Like in the US, AI platforms strengthened their presence within AI browsing journeys, with ChatGPT climbing from #13 to #5, while Gemini (#7) and Claude (#10) entered the top 10. AI assistants accounted for three of the top 10 destinations, compared with just one in top 15 a year earlier.
- ✓ The shift suggests users increasingly moved between AI tools rather than relying on a single assistant.

Reference resources declined

- ✓ Wikipedia, NIH, and ResearchGate all dropped out of the top 15, marking a broader decline in reference and research destinations than was seen in the US.
- ✓ The rankings suggest AI tools increasingly answered users' questions directly, reducing referrals to traditional knowledge resources.

Social platforms lost visibility

- ✓ Facebook, Reddit, Instagram, and LinkedIn all fell in the rankings, pointing to a broad decline in referrals from AI tools to social platforms.



- ✓ Unlike the US, where movements were more mixed, the EU & UK showed a more consistent softening across the social category.

Commerce remained resilient

- ✓ Amazon held steady at #8, maintaining its position unlike in the US.

Consumer platforms gained ground

- ✓ WhatsApp climbed from #14 to #11, while Apple entered the top 15 for the first time. At the same time, Canva fell from #7 to #12.
- ✓ The changes point to a broadening mix of consumer destinations being accessed from AI tools.

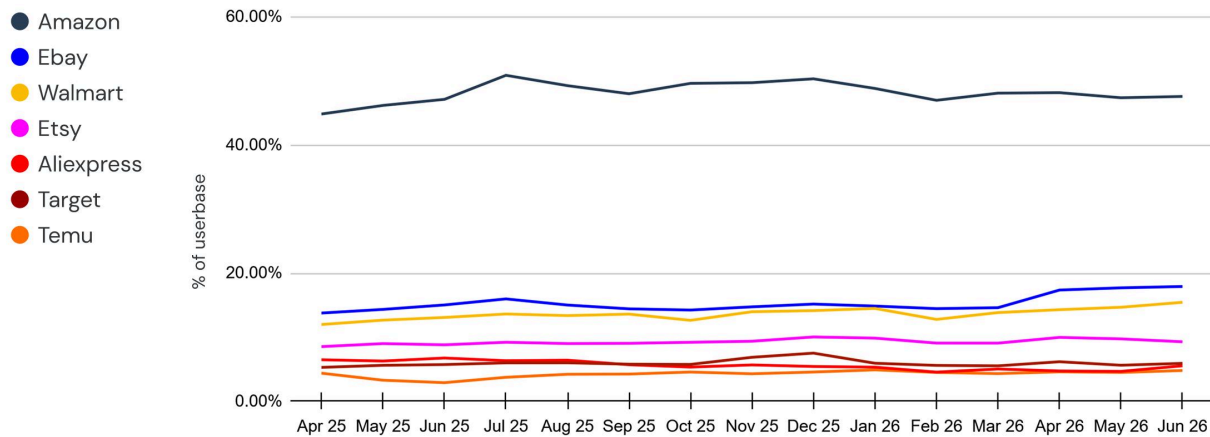
Key takeaways for AI search

- ✓ **AI adoption continued to accelerate**
Across both the US and EU & UK, AI tool usage continued to grow throughout Q2. While AI still accounted for a relatively small share of overall desktop activity, adoption continued to expand steadily across both regions.
- ✓ **Competition intensified beyond ChatGPT**
ChatGPT remained the leading AI platform, but Gemini and Claude recorded the strongest growth during the quarter. In the EU & UK especially, their gains coincided with a modest decline in ChatGPT's share, suggesting competition within the AI market is increasing.
- ✓ **Google AI Mode continued its rollout**
Google AI Mode remained a small but growing part of desktop activity. Growth stabilized in the US after rapid expansion in Q1, while adoption continued to accelerate across the EU & UK, reaching a new high by the end of the quarter.
- ✓ **AI is becoming its own discovery ecosystem**
Users increasingly moved between AI assistants, with ChatGPT, Gemini, and Claude all climbing the rankings of destinations visited from AI tools. This suggests AI assistants are becoming part of broader user journeys rather than standalone applications.
- ✓ **AI referral patterns continued to evolve**
Knowledge resources and social platforms generally became less prominent destinations from AI tools, while AI assistants and a broader mix of consumer platforms gained visibility. The findings suggest AI tools are increasingly keeping users within their own ecosystems while changing how people discover content online.

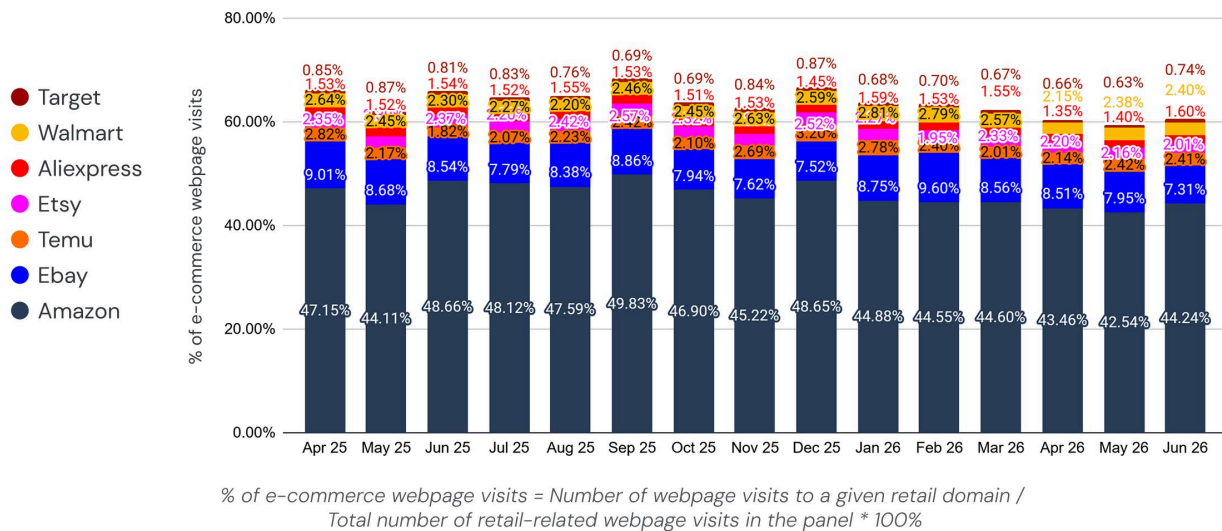


State of E-commerce

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



Share of desktop e-commerce webpage visits in the US



SparkToro

Source: Datas

Datos
A Semrush Company

Amazon remained the dominant e-commerce platform, although both its user share and share of e-commerce visits softened during Q2. User share remained below its December 2025 peak, while its share of visits eased to 42.5–44.2%.

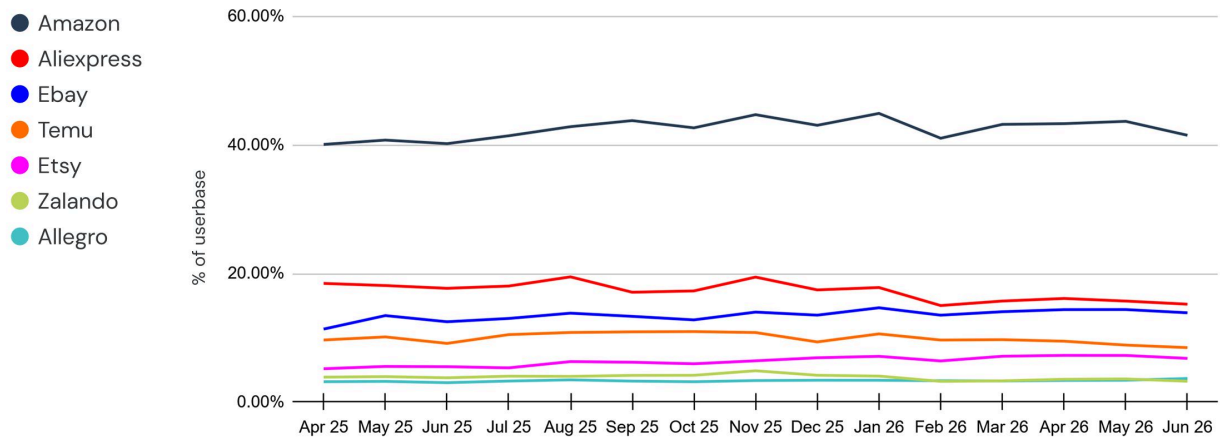
eBay strengthened its position among shoppers, with user share holding between 17.4% and 17.9% throughout the quarter. However, its share of total e-commerce visits declined steadily, falling from 9.6% in February to 7.3% in June.



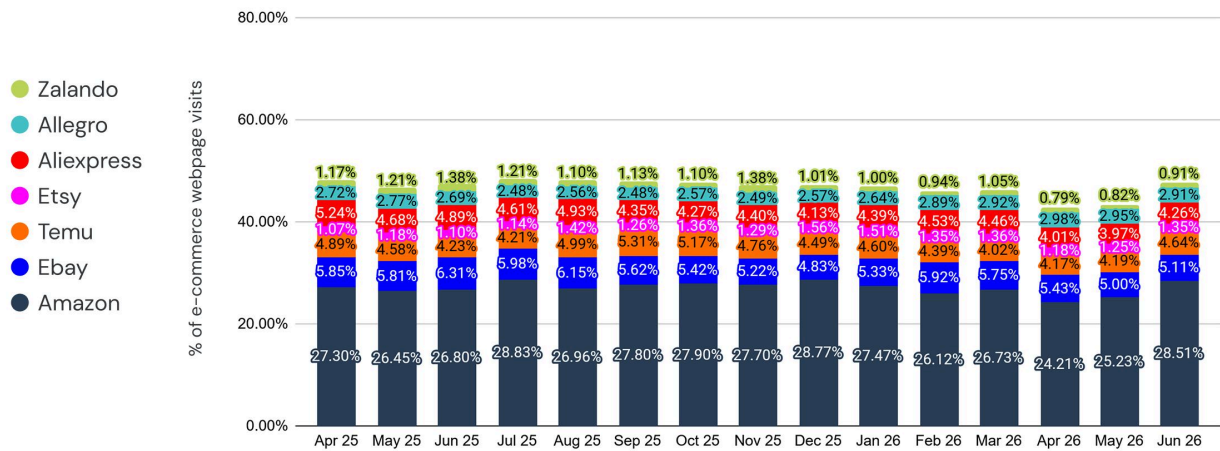
Target also remained below its late-2025 peak, with user share continuing to trend lower for a second consecutive quarter.

Walmart, Etsy, Temu, and AliExpress recorded only modest movements across both user share and visit share. While AliExpress continued to recover gradually, it remained below the levels seen throughout much of 2025.

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



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





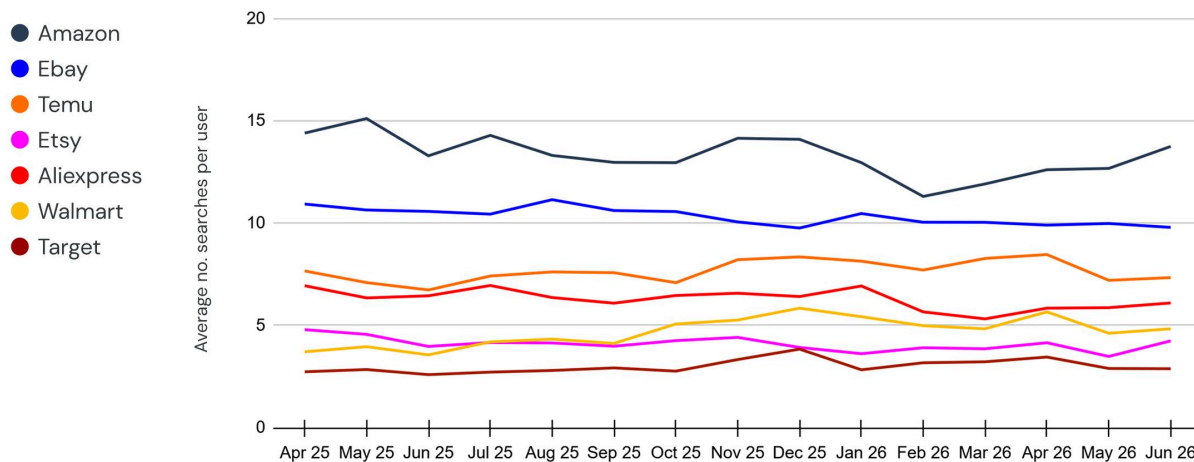
As ever, Amazon remained the dominant e-commerce platform, with its user share remaining broadly stable throughout Q2. After a brief dip in April, its share of e-commerce visits recovered to 28.5% in June – the highest level in the series and above the Q1 average.

Competition for second place intensified. eBay's user share eased slightly after its January peak, while AliExpress continued to decline, narrowing the gap between the two platforms to just 1.3 percentage points by June.

Temu finished the quarter ahead of AliExpress after the two platforms had been near parity earlier in the quarter.

Etsy continued to build a larger user base, remaining within the higher range established in late 2025, while Allegro and Zalando recorded only modest movements across both user share and visit share.

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

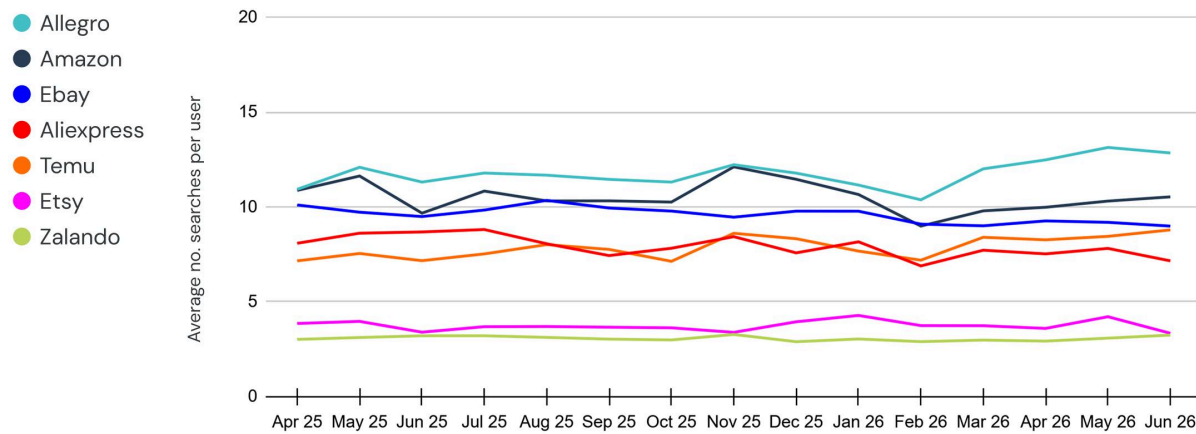


Search intensity remained broadly stable across major e-commerce platforms during Q2, with no consistent trend emerging across the market. Movements varied by platform, suggesting platform-specific rather than market-wide changes in user behavior.

Amazon recorded a modest recovery in search intensity, rising to 13.8 searches per user in June. While this marked an improvement from earlier in the quarter, it remained below the peaks recorded in 2025.



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



Search intensity was mostly similarly stable in Europe across e-commerce platforms during Q2.

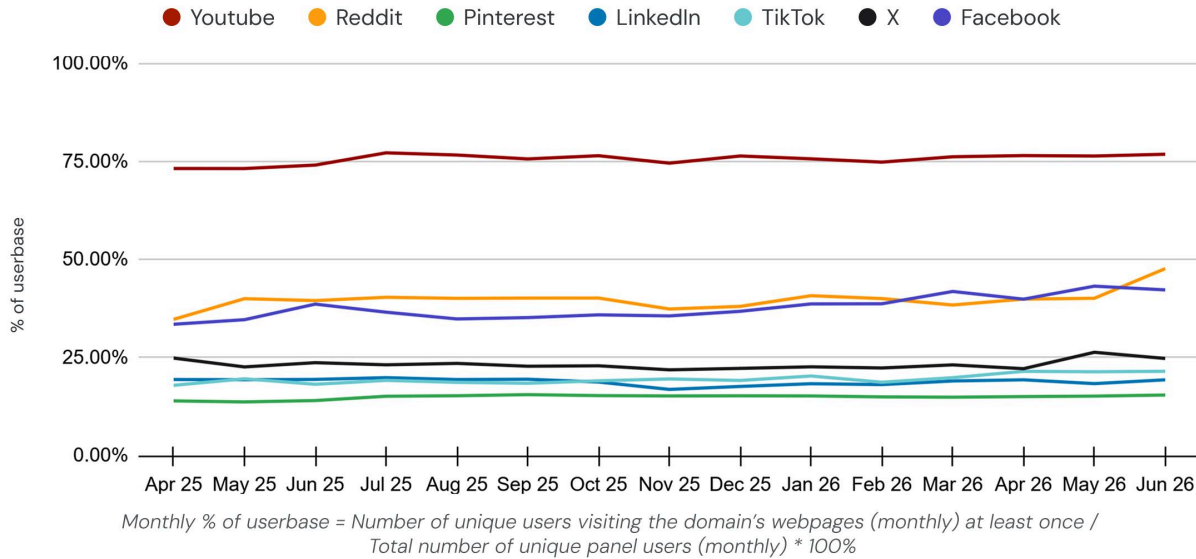
Allegro recorded the strongest increase in engagement, reaching 13.2 searches per user in May and remaining elevated at 12.9 in June, well above the range recorded throughout Q1.

eBay's search intensity stabilized, ending the quarter at 9.0 searches per user, almost unchanged from March and suggesting the earlier decline had levelled off.



State of social content platforms search

Share of desktop users on content platforms in the US

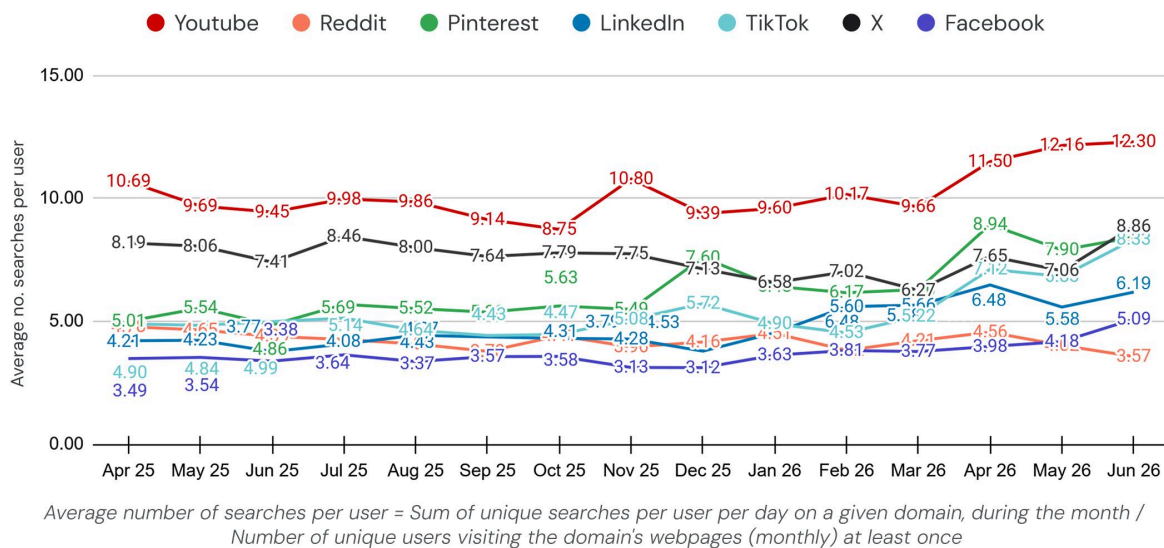


SparkToro

Source: Datos

Datos
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Searches per US desktop user on content platforms



SparkToro

Source: Datos

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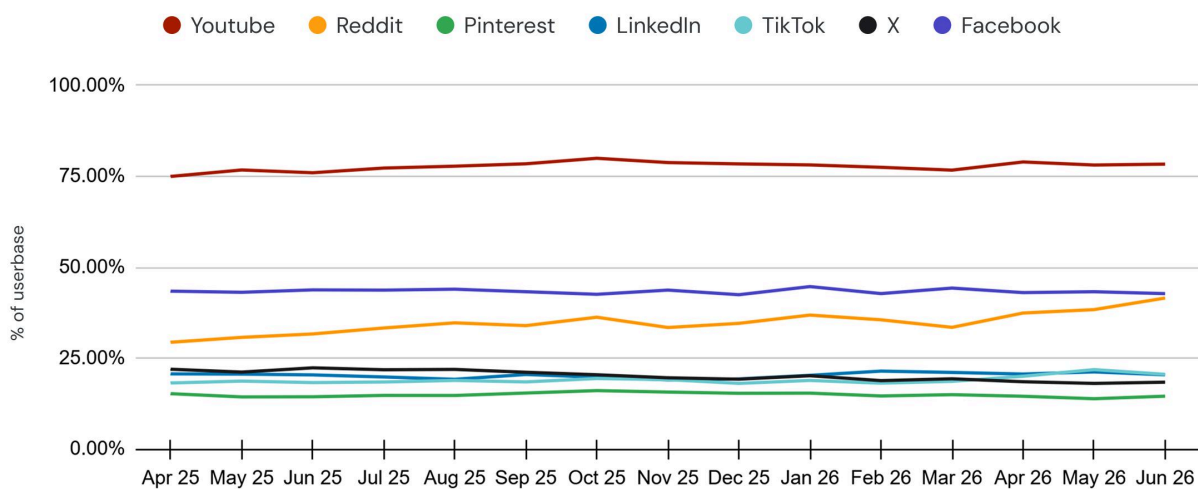
TikTok and X continued to strengthen user engagement, reaching new highs of 8.3 and 8.9 searches per user, respectively. Combined with their growing user bases, the data suggests both platforms expanded in both reach and engagement during Q2.

Reddit's engagement softened despite its growing audience, with searches per user falling to 3.6 by June. While Reddit continued to grow its user share, individual users conducted fewer searches on average.

LinkedIn continued its steady upward trend, reaching 6.2 searches per user by the end of Q2 and extending the gains recorded throughout the past year.

YouTube saw a jump in searches per searcher from March to April, which slowly increased over Q2. Pinterest, and Facebook remained broadly stable, with no sustained changes in search intensity during the quarter.

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



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

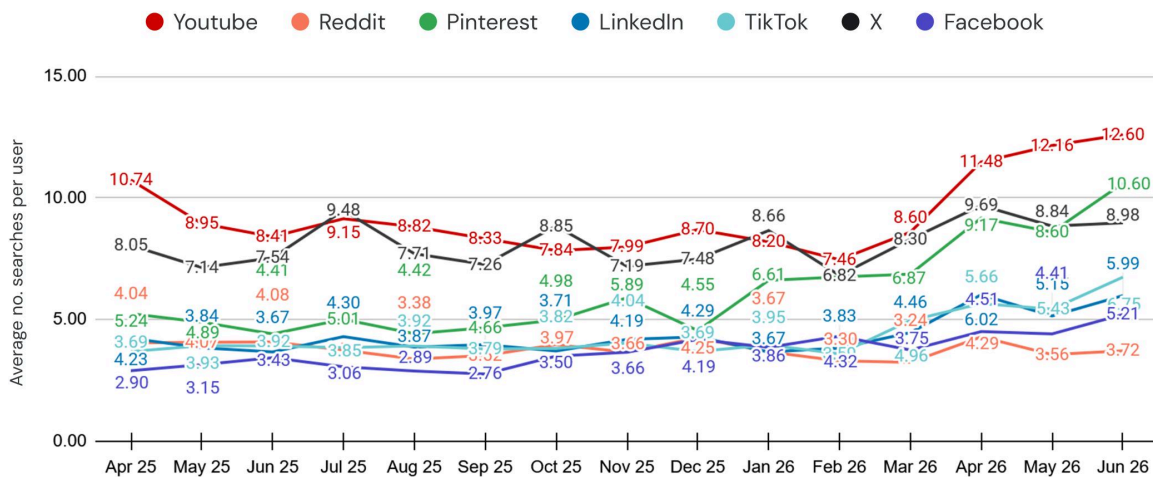


Source: Datos





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 visiting the domain's webpages (monthly) at least once



Source: Datos



Reddit continued to expand its audience, growing from 29.4% of desktop users in April 2025 to 41.6% in June 2026. While its user base increased substantially over the past year, searches per user remained broadly stable.

YouTube, Pinterest, TikTok, LinkedIn, and Facebook all recorded stronger engagement during Q2, with each reaching new highs or moving well above their Q1 ranges.

X showed contrasting trends in reach and engagement. Its user share remained below the range seen throughout most of 2025, but searches per user stayed near record levels, indicating a smaller yet more engaged audience.

Facebook and LinkedIn maintained broadly stable user bases while increasing engagement, demonstrating that growth in activity does not necessarily require growth in audience size.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



Continued growth from any of these platforms is just incredible, because they're already so mature and capture so much of the market. Reddit in particular is becoming a clear standout, and I'm shocked that so few marketers participate there and use it the way they use LinkedIn, YouTube, and Instagram. Another standout note – Threads announced they surpassed 500M active users in June, around 2X what Twitter/X has. We don't see it in these charts because Threads is so mobile-app heavy, but that's another platform marketers would be foolish to ignore.



Key Takeaways

✓ Traditional search remained resilient despite AI growth

Across the US and EU & UK, traditional search continued to dominate desktop activity. While AI adoption expanded steadily throughout Q2, search remained remarkably stable, reinforcing that AI is evolving alongside – not replacing – traditional search.

✓ AI competition intensified

ChatGPT remained the leading AI platform, but Gemini and Claude continued to gain momentum across both regions. At the same time, Google AI Mode expanded further, with adoption accelerating in the EU & UK while stabilizing in the US.

✓ Users continued to refine how they search

Across search engines, informational and commercial queries became more prevalent, navigational searches declined, and users continued adopting longer, more detailed queries. Together, these trends point to a gradual evolution in search behavior.

✓ Platform ecosystems continued to evolve

Google retained a growing share of post-search activity within its own ecosystem, while AI assistants increasingly became destinations for one another. Across search, AI, e-commerce, and content platforms, user journeys continued to diversify without major disruption to the market leaders.

✓ Growth was driven by engagement as much as audience share

Across several platforms, increases in activity came not only from attracting greater user share but also from deeper engagement among existing ones. The findings highlight the importance of measuring both reach and user behavior to understand how digital ecosystems are evolving.

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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 April 2025 – June 2026. For further information please visit Datos's [website](#) and its [Privacy Policy](#).

**Countries included in this study: Belgium, Greece, Lithuania, Portugal, Bulgaria, Spain, Luxembourg, Romania, Czechia, France, Hungary, Slovenia, Denmark, Croatia, Malta, Slovakia, Germany, Italy, Netherlands, Finland, Estonia, Cyprus, Austria, Sweden, Ireland, Latvia, Poland, Iceland, Norway, Liechtenstein, Switzerland, United Kingdom, United States.*

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