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State of Search Q4 2025:

Behaviors, Trends, and Clicks Across the US & Europe

Q4 2025

Introduction

In the current AI age, conversations about the future of search are increasingly shaped by bold claims and speculation. As a result, there is growing demand for observed, large-scale data that reflects how people are truly behaving online, such as the data presented in these quarterly reports.

We have further expanded the data in this report to include:

- Google AI Mode
- changes in query length

to provide additional context on how users are interacting with search and AI-assisted experiences.

Spanning October to December 2025, this report explores how search behaviors are developing across the US, EU, and UK: what users are searching for, where those searches take place, and how engagement patterns are evolving as AI becomes a more consistent part of the search experience.

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.

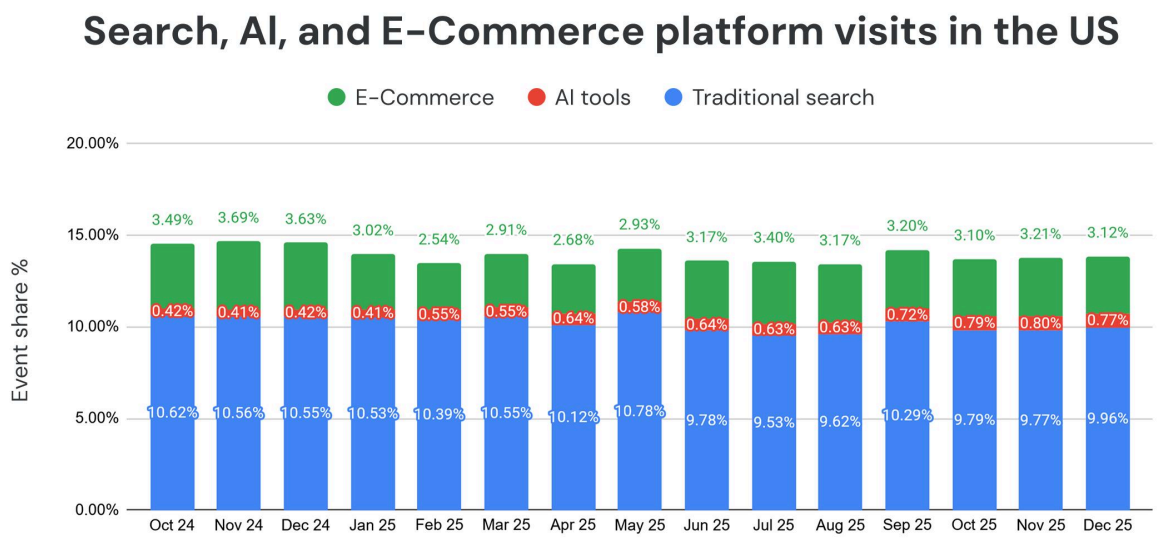
Executive summary

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 October to December 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, shifts in search intent, and regional contrasts in platform usage

Traditional search, AI, and e-commerce



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

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Source: Datos

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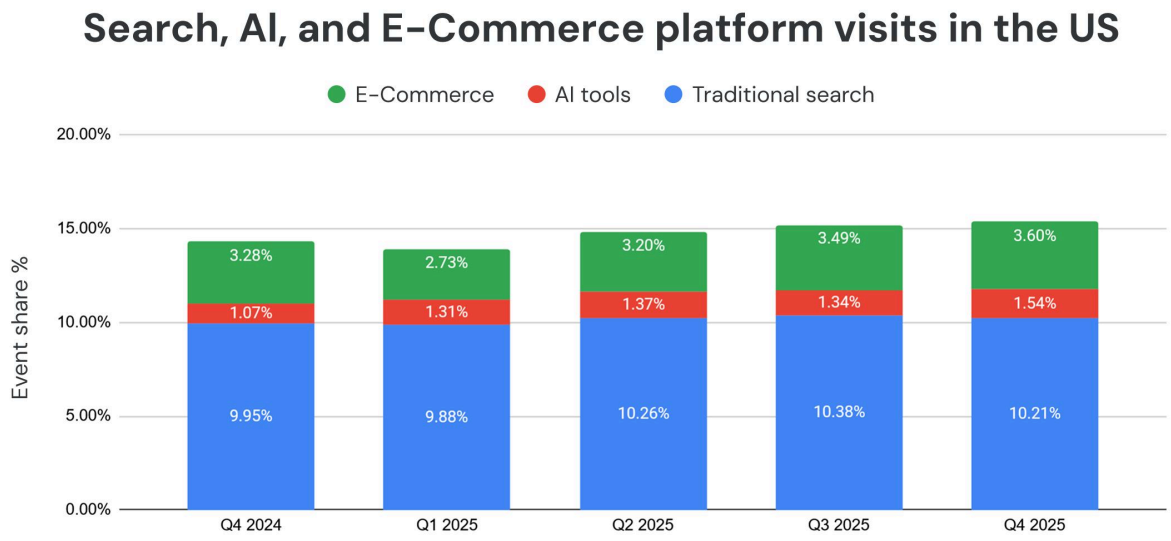

*Quarterly Events Share (%) = Quarterly visits to domain's webpages / Total quarterly webpage visits across entire panel * 100%*

SparkToro

Source: Datos

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Note on quarterly values:

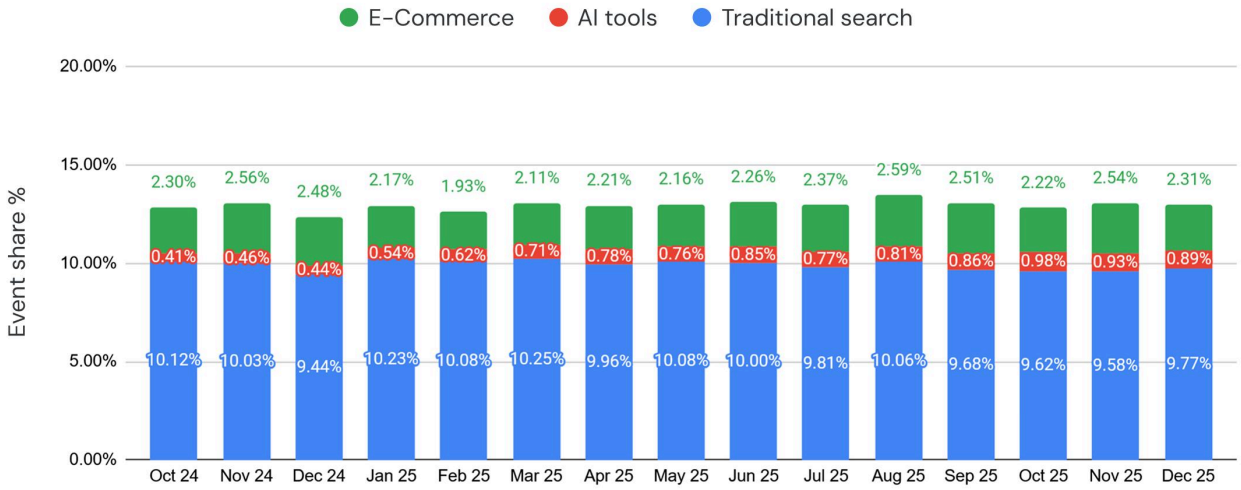
Quarterly metrics are calculated by aggregating all events across the quarter rather than averaging monthly values, which can result in small differences between quarterly figures and monthly averages. Share metrics are calculated as a median across multiple datasets. This approach helps provide the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

In the US, traditional search remained the largest driver of desktop activity, holding steady at around 10% of total events across all quarters. It saw only minor quarter-to-quarter fluctuations in Q4, moving from just over 10% in September to around 9.96% by December.

AI tools maintained a steady upward trajectory. Their share of desktop events increased from approximately 0.42% in December 2024 to 0.77% by December 2025, with continued growth within Q4 itself. While still representing a small fraction of total activity, AI tools are becoming a consistent part of the desktop search and browsing mix.

E-commerce activity remained broadly stable, with minor growth over the past year, increasing from 3.28% in Q4 2024 to 3.6% in Q4 2025.

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



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SparkToro

Source: Datos

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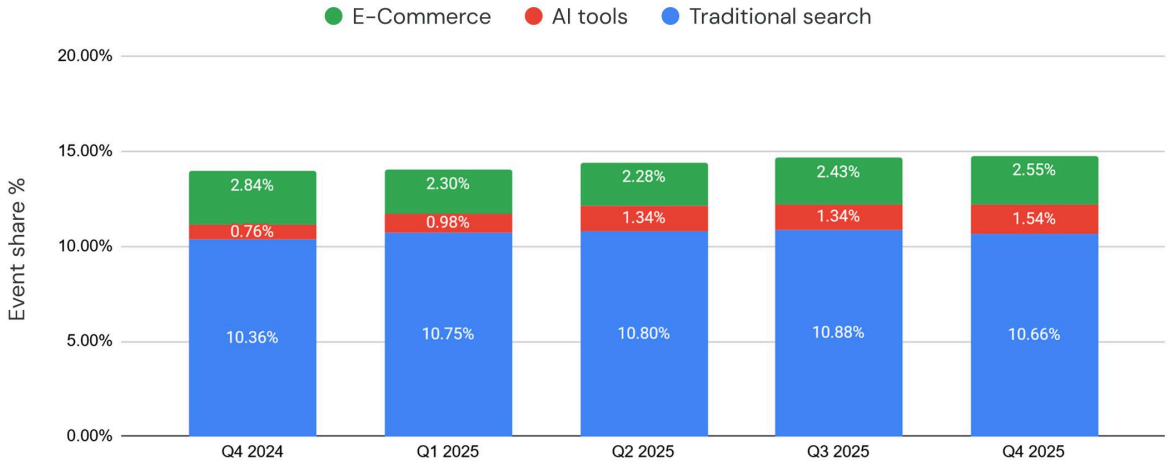
Search, AI, and E-Commerce platform visits in the EU & UK



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

SparkToro

Source: Datos

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Over in Europe, trends closely mirrored those seen in the US. Traditional search retained a major share of desktop activity in the EU and UK, hovering at around 10% of total events, with minor fluctuations.

AI tool usage continued to grow, increasing from 0.44% in Dec 2024 to 0.89% by Dec 2025, and continuing to maintain a slightly higher event share than in the US.

E-commerce activity also remained broadly stable, shifting within the 2.0–2.6% range over the perio.

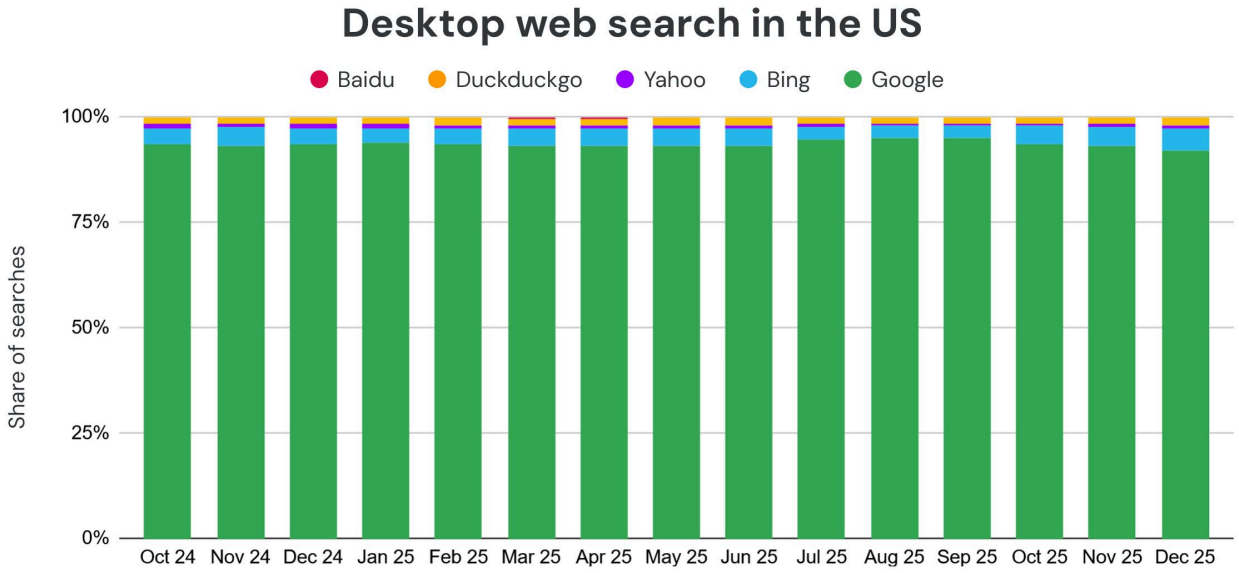
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I'm keeping a close eye on visits to AI tools – this data isn't yet the nail in the coffin, but every quarter that growth slows/plateaus it makes me less certain that the prognostications of AI's "takeover of everything" will ever come to pass. I'm also guessing that Google's inclusion of AI in search results, AI Overviews, and AI mode is taking away a big reason people historically switched away from traditional search to AI tools. Granted, 50% YoY growth in the US and ~100% YoY in the EU/UK is nothing to scoff at, but most of that happened in Q1, and it's been far slower growth (for AI) since.

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%*

SparkToro

Source: Datos

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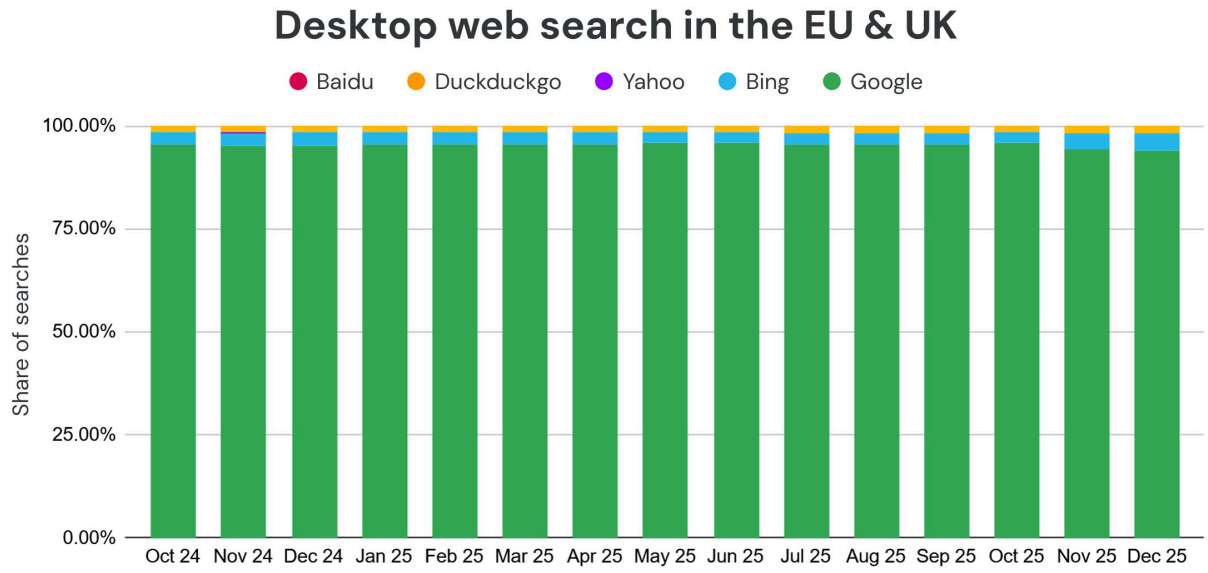
Google, as ever, dominated US desktop search, accounting for 93–95% of searches throughout the period, with only minor month-to-month variation.

Bing remained the no. 2 search engine, showing a largely stable share with a slight growth at the end of the period. Baidu remained largely stable in usage with minimal variation over time.



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SparkToro

Source: Datos

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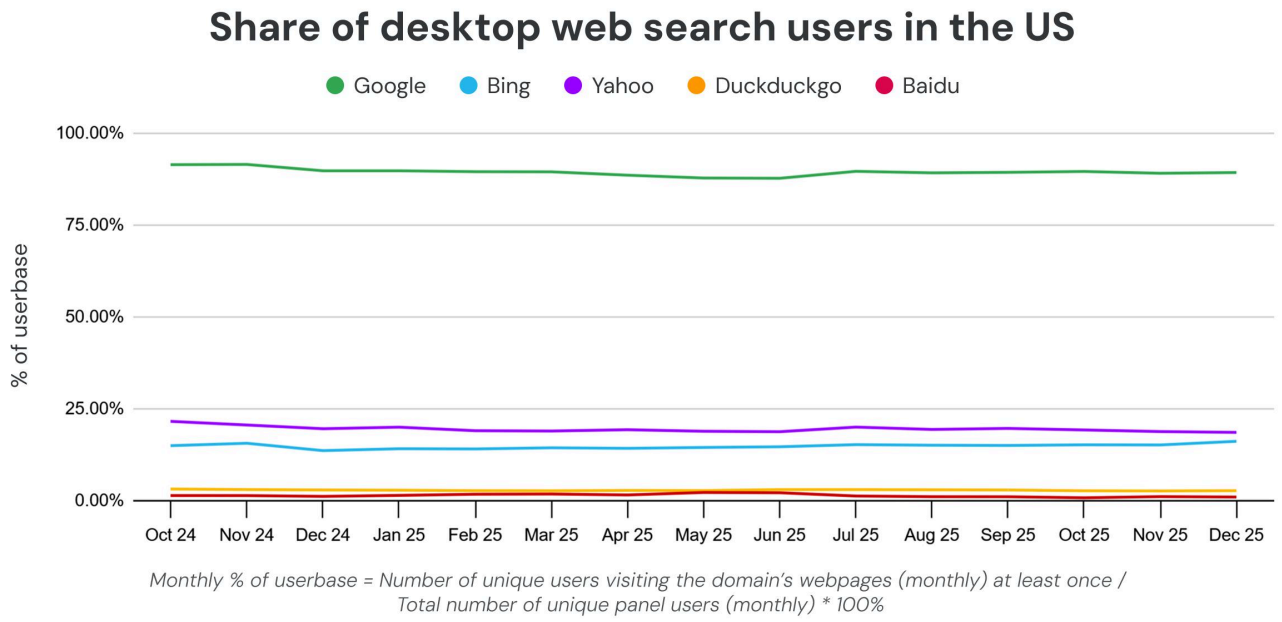
Google continued to dominate desktop search in the EU and UK as well, holding a consistently high share of 94–96% of searches.

Bing also remained in second place, though its search share continues to be slightly lower than in the US. DuckDuckGo, Yahoo, and Baidu showed largely stable search patterns.



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

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Source: Datos

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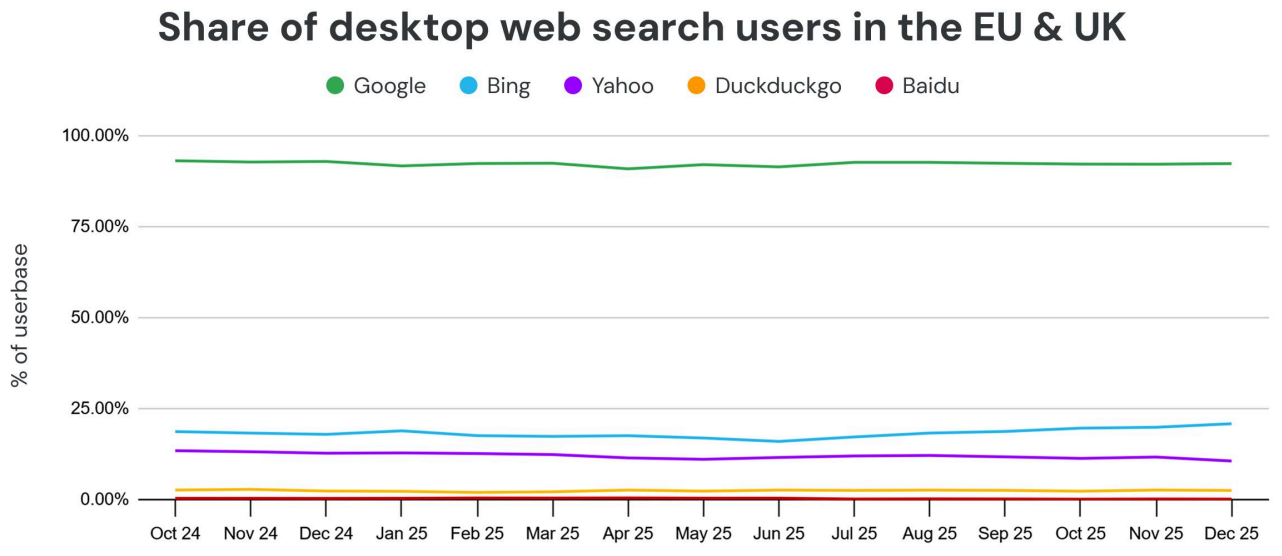
To nobody's surprise, Google remained the market leader in terms of user share too, retaining the dominant share of desktop searchers throughout the period.

Yahoo held second position, showing stable usage with a slight downward trend over time, and Bing ranked third.



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Source: Datos

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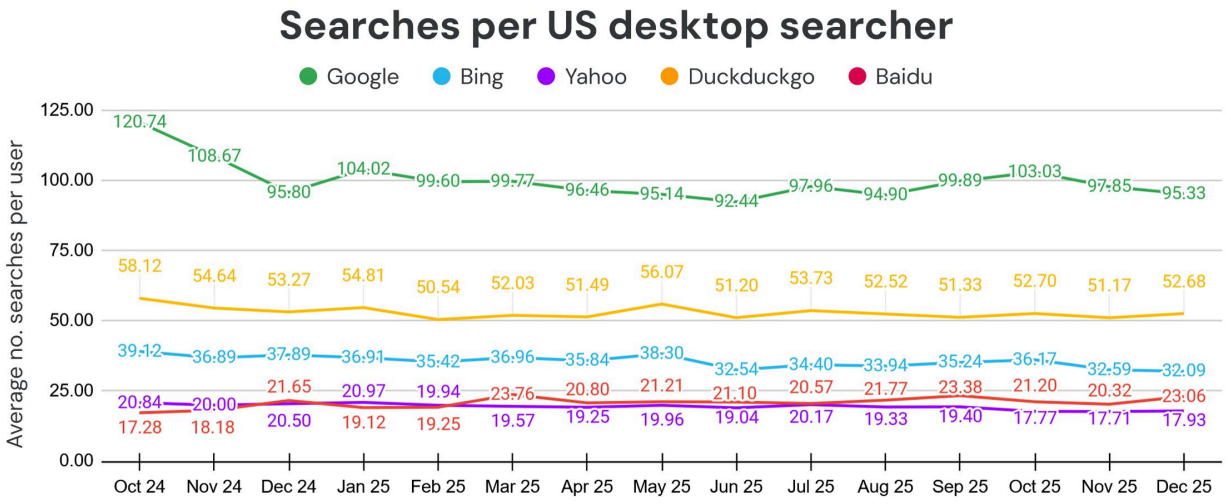
Google remained the clear market leader in the EU and UK, with a stable 90–92% share over time. Unlike in the US, Bing held second place, showing gradual growth in user share. Yahoo ranked third and remained broadly stable over time.



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 who performed at least one search on a given domain

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Source: Datos

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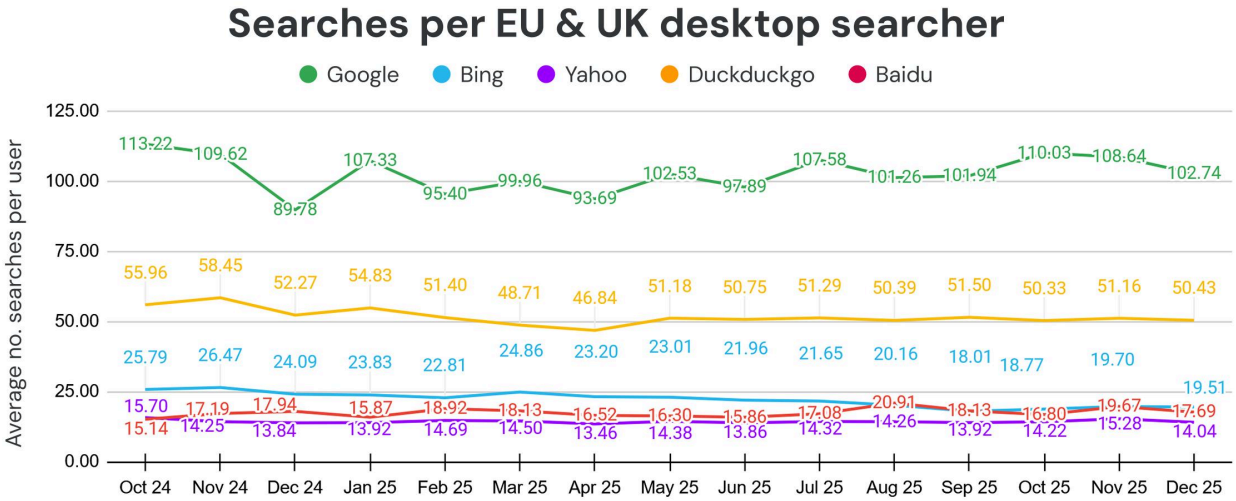
Google continued to have the highest level of user engagement, with desktop searchers performing 92-104 searches per month. Apart from a typical seasonal dip in November–December, usage remained stable.

DuckDuckGo users averaged 50-54 searches, Bing users 32-36, and Yahoo users 17-20.



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Source: Datos

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Google also led in the EU and UK, whose desktop searchers performed 93-110 searches per month, with a seasonal dip in December, much like in the US.

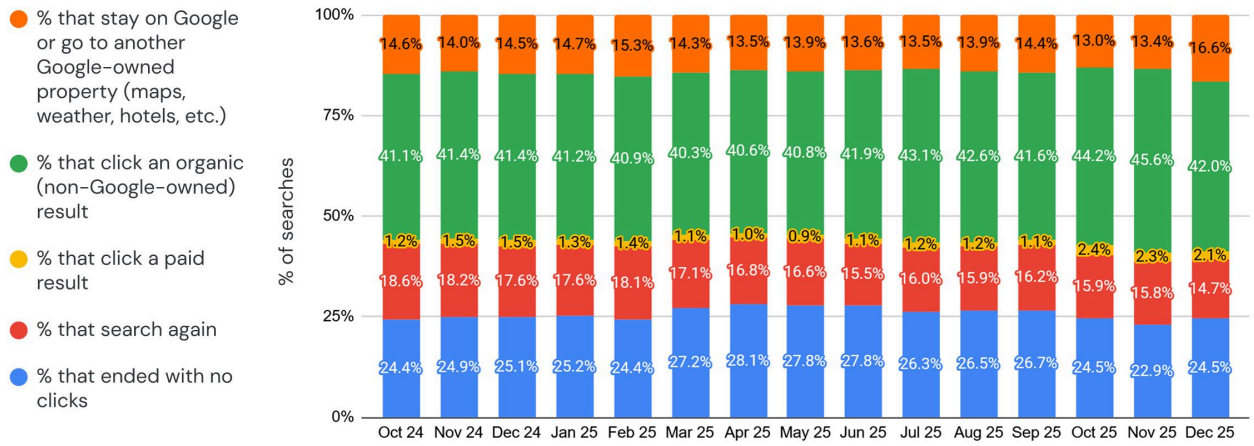
DuckDuckGo, Bing and Yahoo stayed stable with only minor month-to-month variation.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The big highlight here is the decline in # of Google searches/searcher from 2024-2025. It's a nearly 20% decline in the US, though only 2-3% in the EU/UK. Other studies have shown that Google is sending less traffic than in years past, especially to the long-tail of the web, and I suspect that AI answers have dramatically altered the way many users engage with Google, answering their questions before they ever need to click on an organic result or perform a second/third/fourth search. The question is whether the last year of relatively stable searches/searcher will continue, or if Google's changes (or competition/user behavior) has another big shakeup coming in the future (for example, if AI mode or something like it were to become the default Google search response).

Distribution of Google US desktop search clicks over time



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Source: Datos

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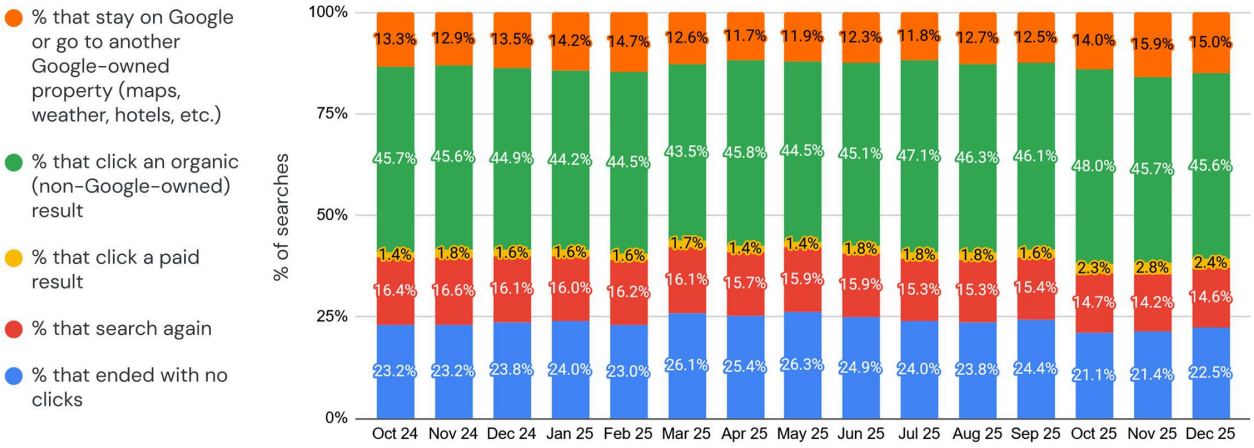
Over the same period, both organic and paid clicks increased, peaking in late Q3 and Q4 and remaining elevated into year-end. Clicks staying within Google-owned properties remained broadly stable, while repeat searches fluctuated only marginally.

Distribution of Google EU & UK desktop search clicks over time



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Source: Datos

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In the EU and UK, zero-click searches fluctuated toward year-end and settled around 22.5% in December.

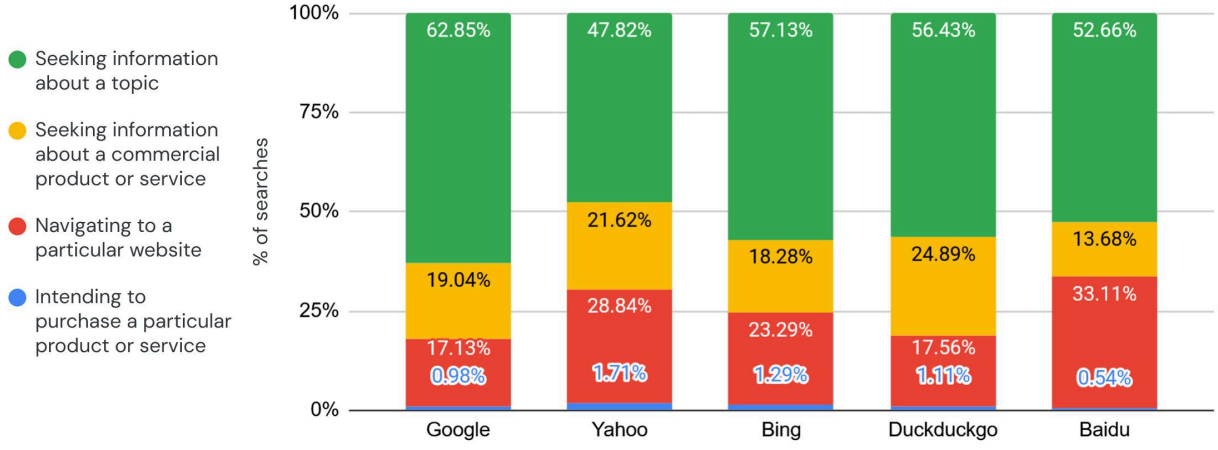
Repeat searches and clicks within Google-owned properties showed limited month-to-month variation, pointing to broadly stable search behavior rather than dramatic shifts in user behavior.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The number I'm always watching like a hawk is the green bar in both charts – that shows us what percent of search clicks are going to non-Google-owned properties who aren't paying for the traffic. What we're seeing in this data is relative stability for desktop searchers.

Categorization of US desktop search intent in Q4 2024



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Source: Datos

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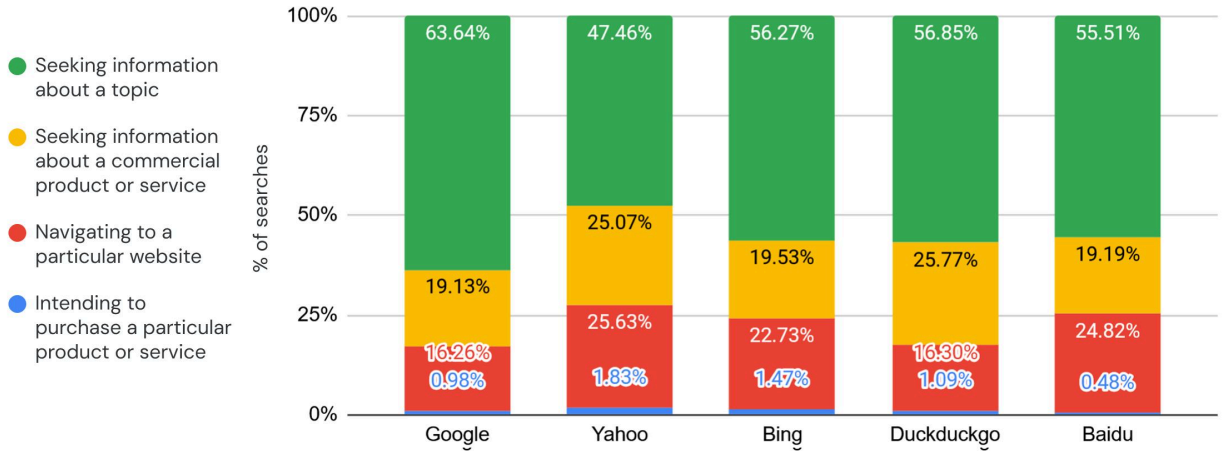
Categorization of US desktop search intent in Q4 2025



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Source: Datos

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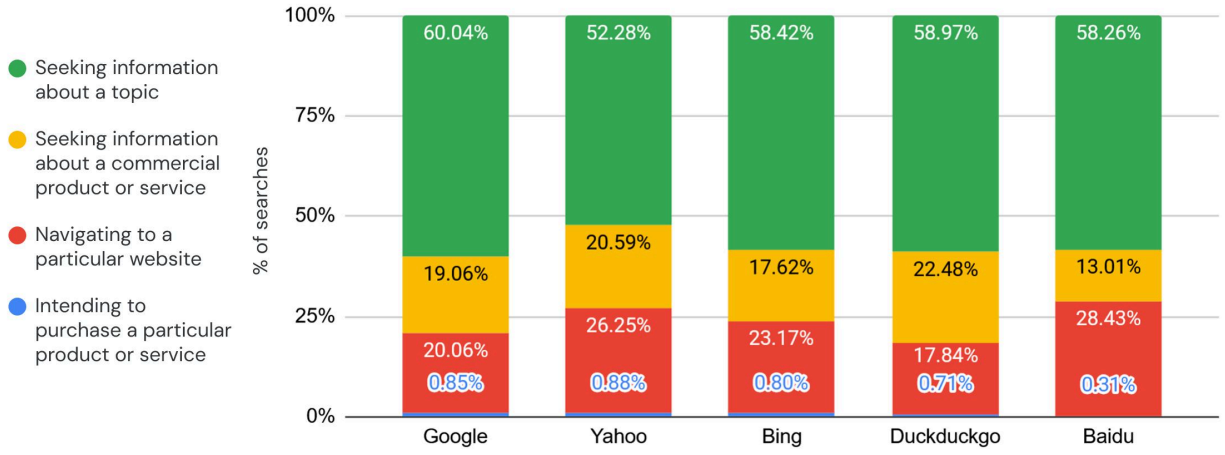
Informational intent continues to dominate desktop search across all engines and regions. In the US, informational queries accounted for 55–63% of searches in both Q4 2024 and Q4 2025, underscoring search's enduring role in information discovery.

Commercial research intent remained broadly stable year over year, with only minor drifting across engines, most notably on Yahoo and DuckDuckGo. Direct purchase intent remained minimal and stable, staying below 2% across all engines.

Categorization of EU & UK desktop search intent in Q4 2024



SparkToro

Source: Datos

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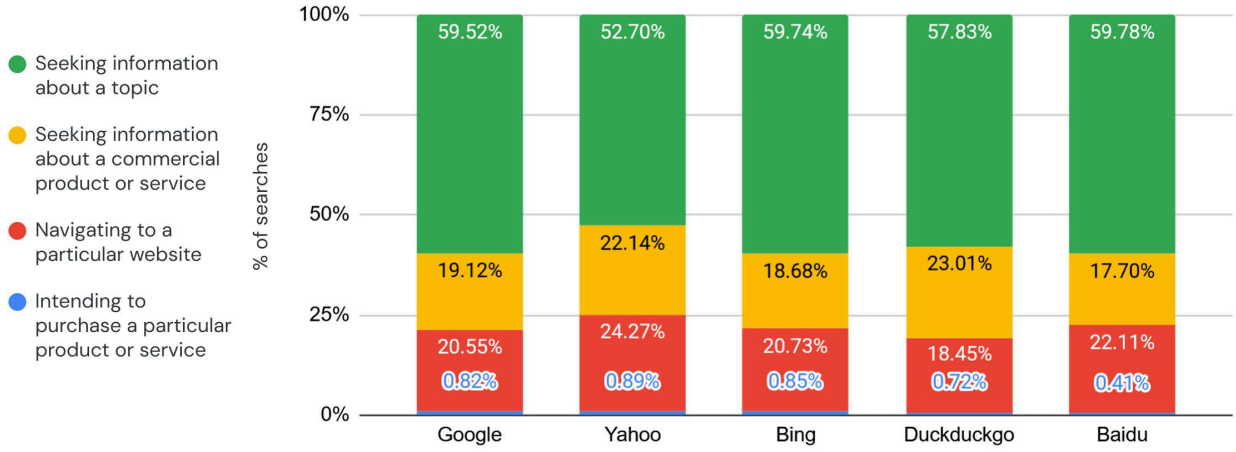
Categorization of EU & UK desktop search intent in Q4 2025



SparkToro

Source: Datos

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In the EU and UK, informational intent similarly dominated, accounting for 52–59% of queries across engines in Q4 2025. Navigational and commercial research intent showed only minor engine-level variation, with no material change to the overall intent mix. Direct purchase intent remained negligible, staying below 1% across all search engines.

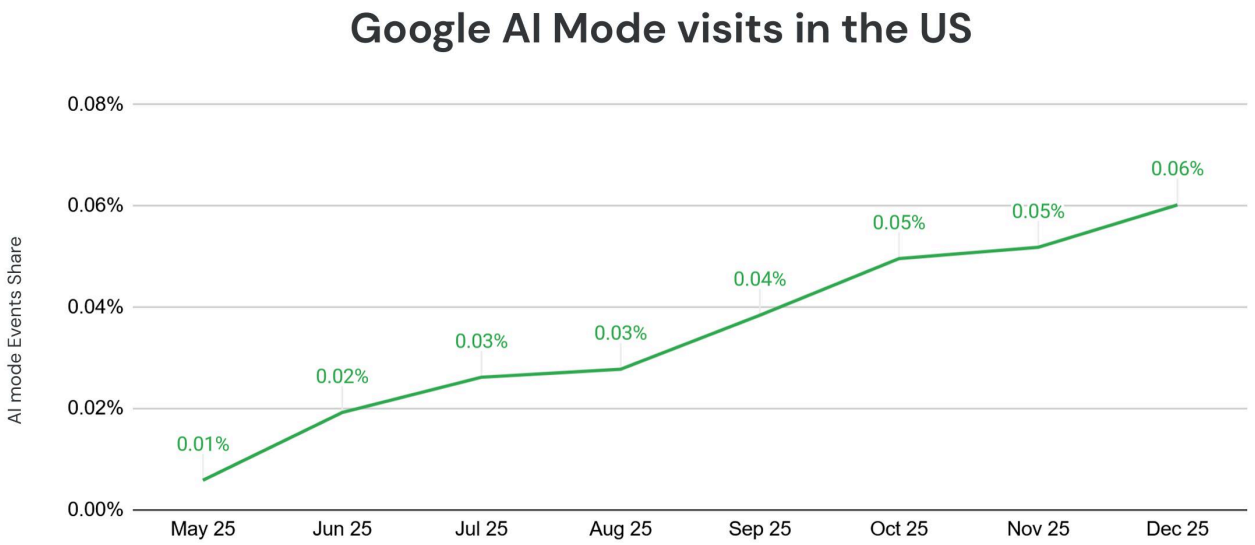
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I keep expecting to see bigger changes in the % of searchers seeking a particular website, but this data is really helpful in adjusting my expectations and hypotheses about where Google's going. My old theory was that searchers would seek out less information and would use Google more as navigation (a change we saw from years past). My new theory is that we've plateaued here because Google has (with the adoption of more instant answers and AI) gotten so good at providing information without a click (good for user satisfaction, but obviously bad for publishers, digital marketers, and the open web).

Google AI Mode NEW

For the first time this quarter, we examined the share of total clicks attributed to AI mode over the past 15 months.



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

SparkToro

Source: Datos

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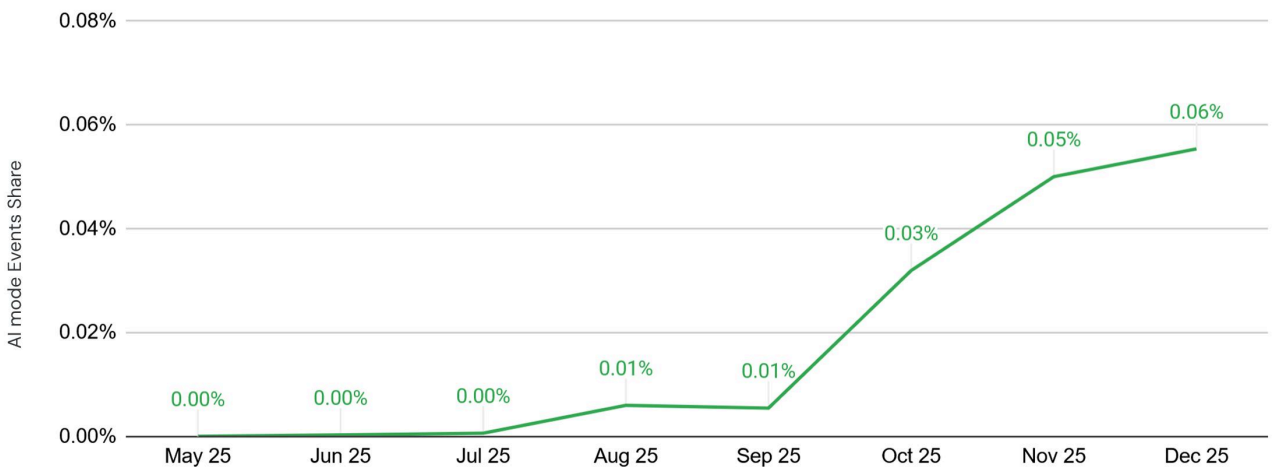
Google's AI Mode remains a very small slice of overall US desktop activity, but its share has increased steadily through 2025. From May through December, AI Mode events' share rose gradually month over month.

While the overall magnitude is still low relative to standard search interactions, the direction of change is consistent. That makes AI Mode an important signal to monitor in 2026, particularly as Google continues to evolve AI-powered experiences inside the search workflow.

Google AI Mode visits in EU & UK



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

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Datos
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In the EU and UK, AI Mode adoption appears later than in the US, reflecting a delayed rollout. After its initial emergence, usage climbed and converged toward similar levels by year-end, reaching approximately 0.06% of events share in December.

As in the US, AI Mode still represents a very small portion of total activity. However, the upward trajectory suggests growing exposure and repeat usage, positioning AI Mode as a developing layer within the broader search ecosystem.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

This is a big one to watch. Google could very easily push AI Mode more aggressively with UI/UX changes, but so far, they've kept it very subtle and opt-in. Still, the growth suggests early adopters are finding, liking, and repeatedly using it. Search marketers who want to future-proof their marketing should invest ASAP in AI Mode visibility.

Top US search destination domains Q4 2024 - Q4 2025

After a search, which domains were most often visited? This next section lists the top 15 domains, comparing Q4 2024 with Q4 2025.

Top US search destination domains Q4 2024 - Q4 2025

Q4 2024		Q4 2025	
1 Youtube	9 Tiktok	1 Youtube	9 Tiktok
2 Reddit	10 Linkedin	2 Reddit	10 Ebay
3 Amazon	11 Quora	3 Amazon	11 Linkedin
4 Wikipedia	12 Ebay	4 Wikipedia	12 Microsoft
5 Facebook	13 X	5 Facebook	13 Walmart
6 Instagram	14 Pinterest	6 Instagram	14 X
7 Microsoft	15 Apple	7 Chatgpt	15 Apple
8 Fandom		8 Fandom	

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

Source: Datos

Datos
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Top platforms remain unchanged

- YouTube, Reddit, Amazon, Wikipedia, and Facebook held the top five positions year over year.
- The ordering at the top remained stable with YouTube in the top spot, indicating limited disruption in search-driven discovery.

AI keeps climbing

- ChatGPT climbed to #7 in Q4 2025 (up from #9 in Q3 2025).

Reference and utility sites lose ground

- Quora exited the top 15, while Apple and Microsoft moved lower in the ranking.

Top European search destination domains Q4 2024 - Q4 2025

Top European search destination domains Q4 2024 - Q4 2025

Q4 2024				Q4 2025			
1	Youtube	9	Tiktok	1	Youtube	9	Tiktok
2	Wikipedia	10	Linkedin	2	Reddit	10	Fandom
3	Reddit	11	Github	3	Wikipedia	11	Linkedin
4	Amazon	12	Steam	4	Facebook	12	Steam
5	Facebook	13	Pinterest	5	Amazon	13	Github
6	Instagram	14	Ebay	6	Instagram	14	Pinterest
7	Microsoft	15	X	7	Chatgpt	15	Ebay
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

Datos
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Core platforms continue to dominate

- YouTube remained the leading destination, followed by Reddit, Wikipedia, Facebook, and Amazon.
- The top tier showed minor reordering compared to Q4 2025.

AI gains visibility

- ChatGPT rose one position to #7, matching its position in the US.

Social and commerce destinations reshuffle

- Instagram, LinkedIn, Pinterest, and eBay shifted positions within the top 15.
- Changes reflect rotation rather than major shifts in behavior.

Technical and community platforms remain stable

- GitHub and Steam held steady positions year over year.
- Their persistence points to continued demand for technical and community-driven content.

Rand's Take

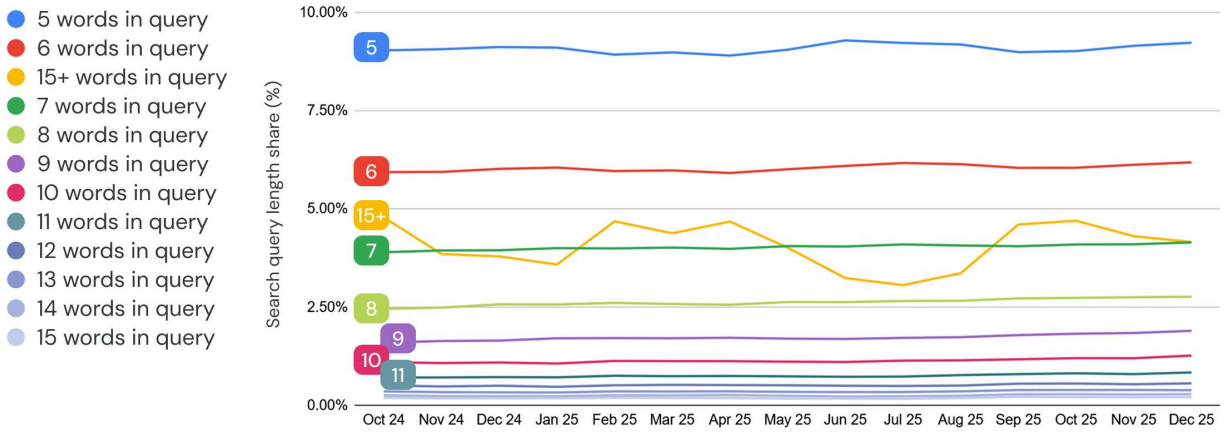
Rand Fishkin
SparkToro Co-founder & CEO

This is one of the more depressing charts we show. It's important to know that breaking into the crushing monopoly that dominates where Google sends traffic is nearly impossible, but the degree to which almost nothing moves at all bums me out. That lack of movement indicates a less competitive, dynamic, and innovative search environment.

Changes in query length distribution NEW

For the first time this quarter, we examined how the number of words and characters in search queries has changed over the past 15 months.

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*

SparkToro

Source: Datos

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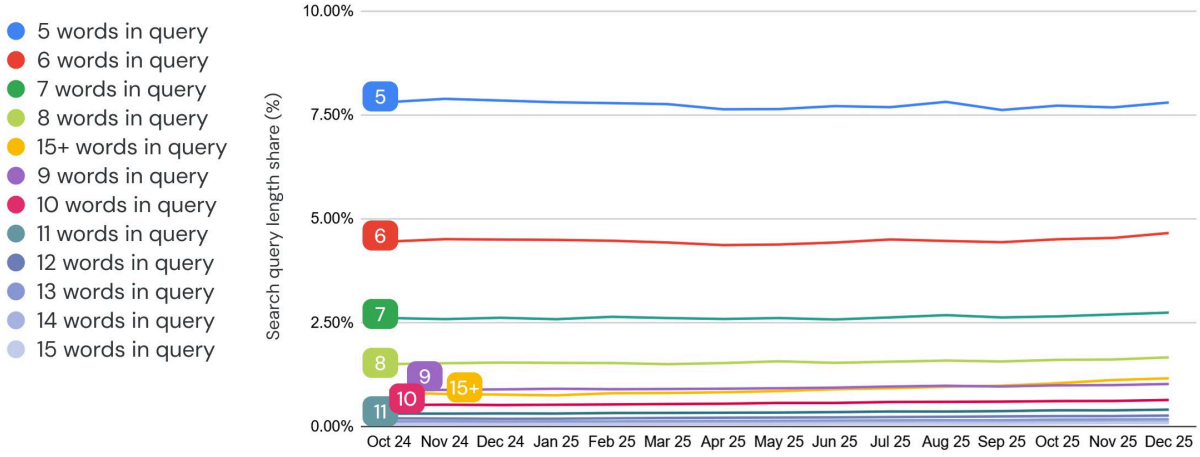
In the US, the most (though still modest) growth appears in mid-length queries, particularly 6–9 word searches. However, searches that are 15+ words hover around similar levels to 7-word queries, showing more volatility than all other query lengths.

The overall distribution indicates gradual movement away from the shortest query formats and toward more explicit, multi-term phrasing. This suggests that users may be becoming more comfortable expressing complex needs directly in search.

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



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SparkToro

Source: Datos

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In the EU and UK, the slight query-length shift is also visible, with the fastest relative growth occurring at both ends of the "longer query" spectrum. The largest increases are observed in 6-word queries and 15+ word queries, though unlike in the US, 15+ word queries were less common and less volatile.

Compared to the US, the combined share of longer queries appears to be increasing slightly faster. This points to a steady evolution in how users formulate searches, moving toward longer phrasing.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Americans experimenting so much more aggressively with very long queries is fun to see in the data. I'll be watching to see if other countries and languages eventually make this change as well.

Key takeaways for traditional search

Traditional search remained the dominant driver of desktop discovery

Across the US and EU and UK, traditional search held a stable share of total activity, with only minor seasonal and quarter-to-quarter variation.

Zero-click behavior fluctuated but did not accelerate

While searches that end with no clicks remained elevated, Q4 data points to stabilization rather than growth.

User engagement shows stability rather than acceleration

Search intensity, post-search behavior, and zero-click rates showed limited variation, pointing to continuity in how users interact with search results.

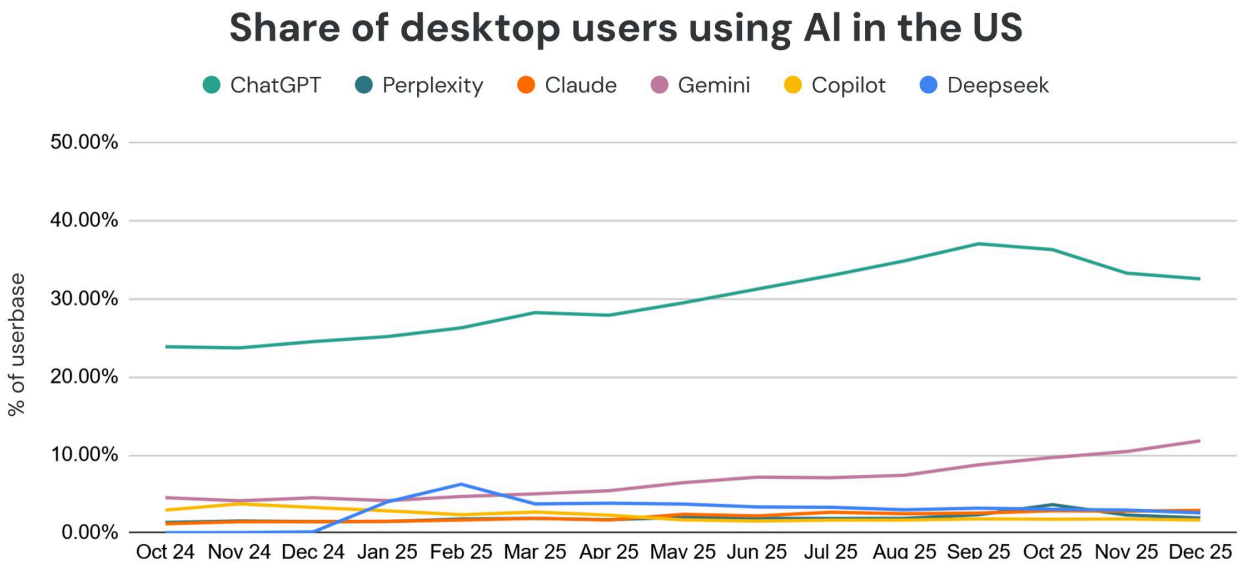
Search intent remained largely unchanged

Informational queries continued to dominate, commercial research holds steady, and direct purchase intent remains relatively small across engines and regions.

New signals point to gradual evolution

Google AI Mode visits showed steady but limited uptake, while increasing query length suggests users are refining how, rather than where, they search.

State of AI search



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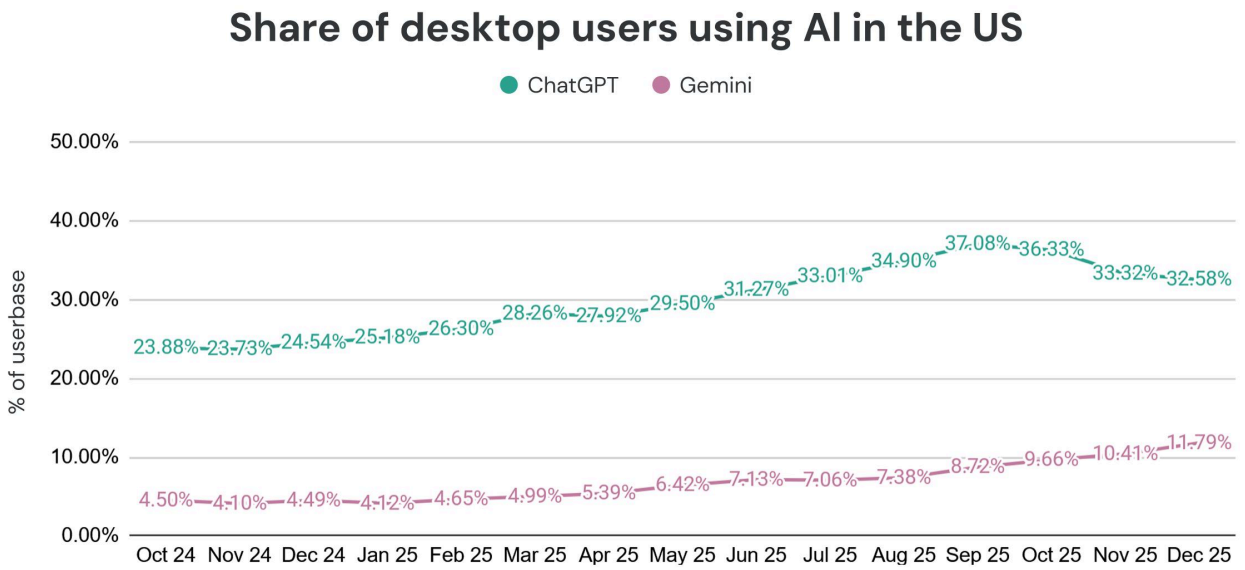

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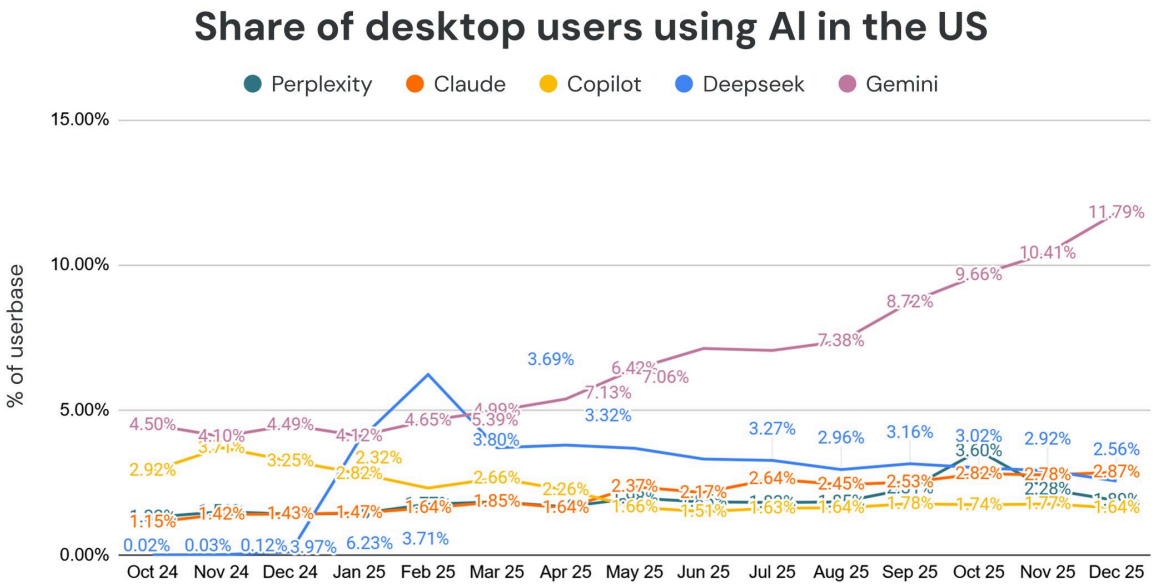

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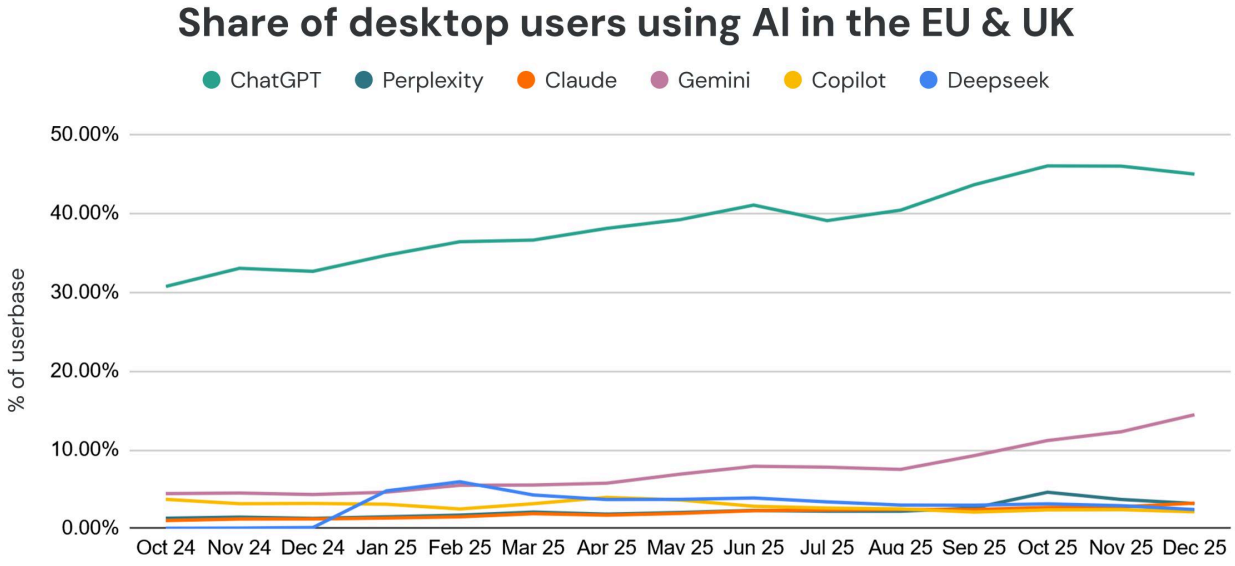
AI tool usage continued to develop across both regions in Q4 2025.

In the US, ChatGPT remained the clear leader, with desktop user share fluctuating seasonally but averaging 25–37% across the year. Gemini showed consistent month-over-month growth, increasing from 4–5% early in the year to 10–11% by year-end, overtaking DeepSeek to become the second-largest AI tool.

Other AI platforms, including Perplexity, Claude, Copilot, and DeepSeek, exhibited moderate variability without signs of rapid breakout adoption.

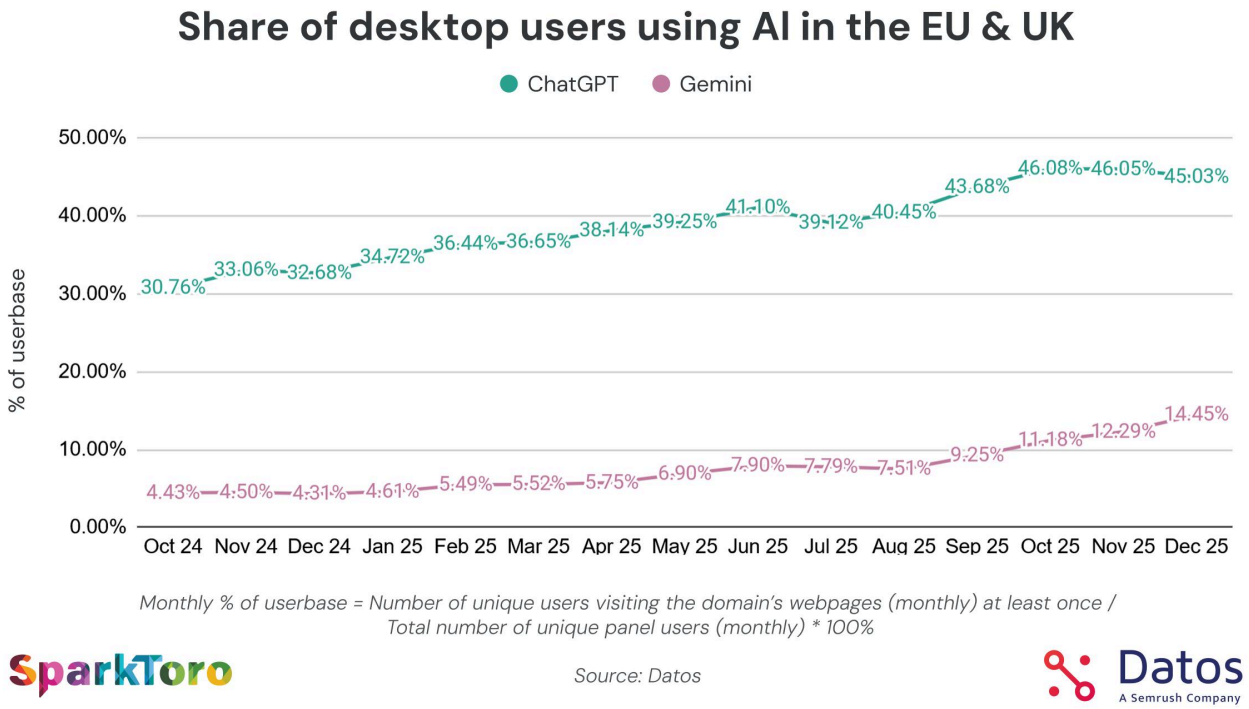


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro

Source: Datos

Datos
A Semrush Company



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SparkToro

Source: Datos

Datos
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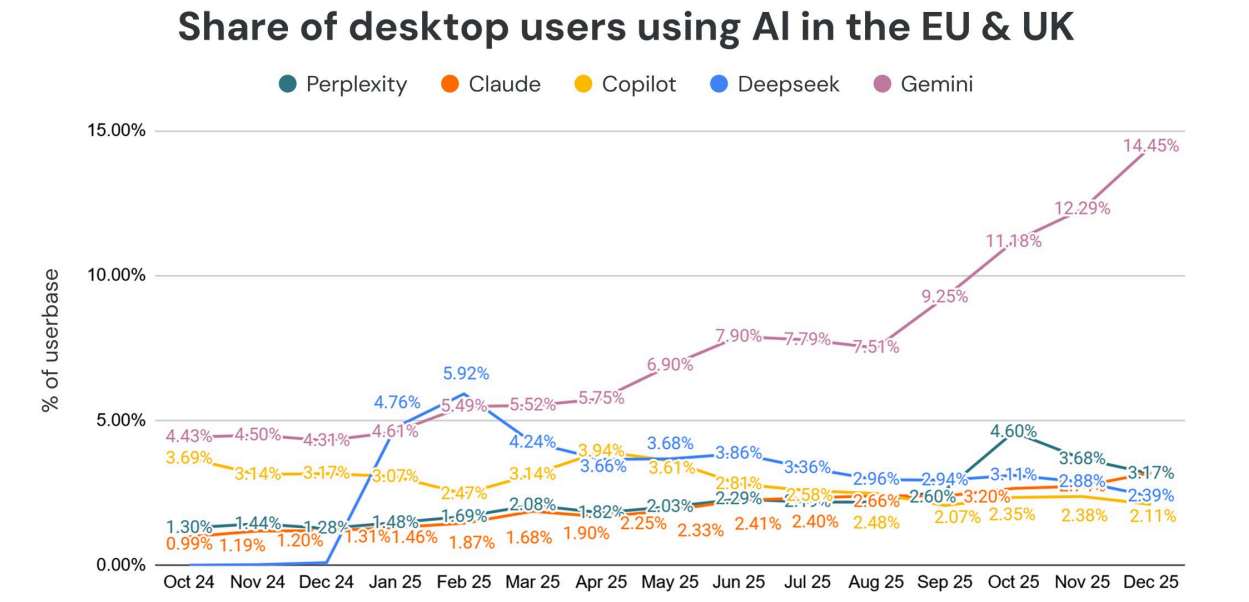

*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro

Source: Datos

Datos
A Semrush Company

In the EU and UK, ChatGPT's dominance was even more pronounced, averaging 34–46% of desktop users across 2025. Gemini again demonstrated consistent month-over-month growth, increasing from ~4% to ~14% by late 2025, becoming the second-largest AI tool after overtaking DeepSeek in early 2025.

Perplexity showed a spike in October before stabilizing, while Claude and Copilot remained steady.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The new narrative that Google is gaining the upper-hand in AI is certainly reinforced by these charts. Gemini tripled in a year, while ChatGPT grew <50% with a slowing trajectory. Claude is still relatively niche, but like Gemini, they also tripled (1% to 3% from Oct' 24 to Oct '25). I'm partial to the emerging narrative that ChatGPT will continue to be a general AI tool for many folks (especially in education), while Google/Gemini/AI Mode dominates search and become the primary competitor to ChatGPT in general-use, and Claude becomes the niche market leader for coding.

Top US AI destination domains Q4 2024 - Q4 2025

Where did users go after an AI search? This next section lists the top 15 domains, comparing Q4 2024 with Q4 2025.

Top US AI destination domains Q4 2024 - Q4 2025

Q4 2024

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

Q4 2025

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

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

Source: Datos

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Core infrastructure leads

- Google, YouTube, GitHub, Microsoft, and Amazon occupied the top five positions in both Q4 2024 and Q4 2025.
- AI-driven traffic continues to concentrate around established platforms.

AI-native tools rise

- ChatGPT climbed from #14 to #6 year over year.
- Gemini entered the top 10 in Q4 2025.

Developer and research platforms strengthen

- GitHub rose to #3, while NIH remained within the top 10.
- These shifts highlight AI's role in coding, research, and technical workflows.

Social and professional platforms rotate

- Reddit moved into the top 10, while LinkedIn and Facebook slipped slightly.
- Movements suggest changing emphasis rather than declining relevance.

Top European AI destination domains Q4 2024 - Q4 2025

Q4 2024

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

Q4 2025

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

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

Source: Datos

Datos
A Semrush Company

Core platforms remain dominant

- Google and YouTube held the top two positions, followed by GitHub and Amazon.
- The overall structure mirrors the US, with limited reordering at the top, though Microsoft notably dropped 5 places from Q4 2024 to Q5 2025.

AI tools gain prominence

- ChatGPT rose from #14 to #6, matching the USA year-on-year climb.
- Gemini also entered the European top 10, indicating growing adoption of AI-native platforms.

Knowledge and community platforms persist

- GitHub moved up to #3, while Reddit climbed into the top 10.
- These shifts reinforce the role of AI in technical research and community-led discovery.

Communication platforms hold ground

- WhatsApp remained in the top 15, reflecting regional differences in AI tool browsing paths.
- LinkedIn slipped toward the lower end of the ranking.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The most interesting domains on this list are those that don't appear in the "top search destinations" list above, i.e. NIH, Canva, Anthropic, Github, and Gemini. Those illuminate the difference in intent between AI "searchers" and traditional search users, showing that many of these AI users are trying to accomplish specific solutions around health, content creation, and programming.

Key takeaways for AI search

AI search usage continued to expand steadily across regions

Desktop adoption increased throughout 2025 in both the US and EU and UK, pointing to normalization rather than a new surge of experimentation.

ChatGPT remained the clear market leader

It consistently accounts for the largest share of AI tool users, with especially strong penetration in the EU and UK, and no competing tool showing signs of closing the gap.

Gemini has emerged as the strongest secondary platform

Sustained month-over-month growth allowed Gemini to overtake DeepSeek and establish itself as the second-largest AI tool by the end of 2025, while other AI tools remained niche.

Google AI Mode emerged as a small but growing layer in search

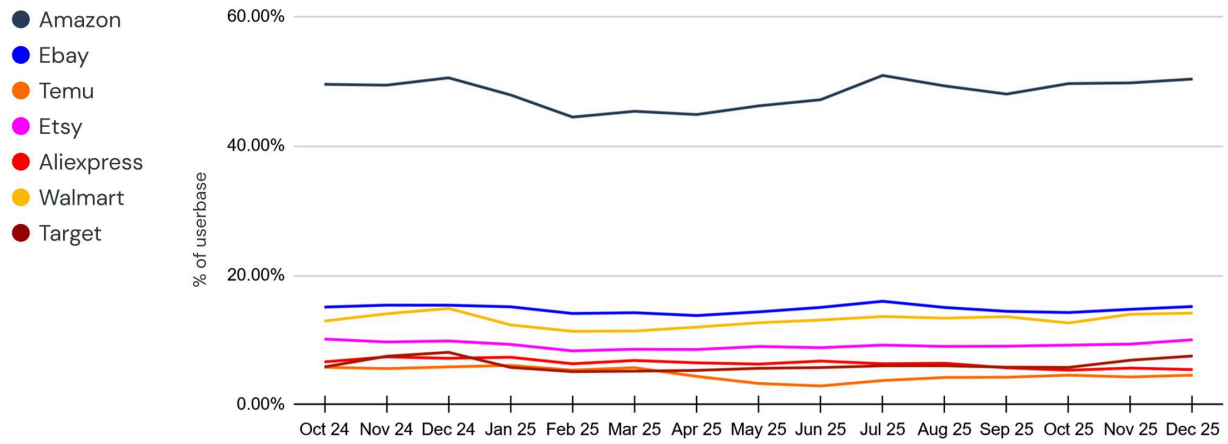
While AI Mode accounts for a limited share of total activity, its steady uptake suggests AI-assisted experiences are being incorporated into traditional search workflows rather than replacing them.

AI-driven browsing reinforced existing digital ecosystems

Traffic from AI tools continued to flow primarily toward established platforms (particularly search, developer, research, and reference sites) rather than new destinations.

State of E-commerce

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



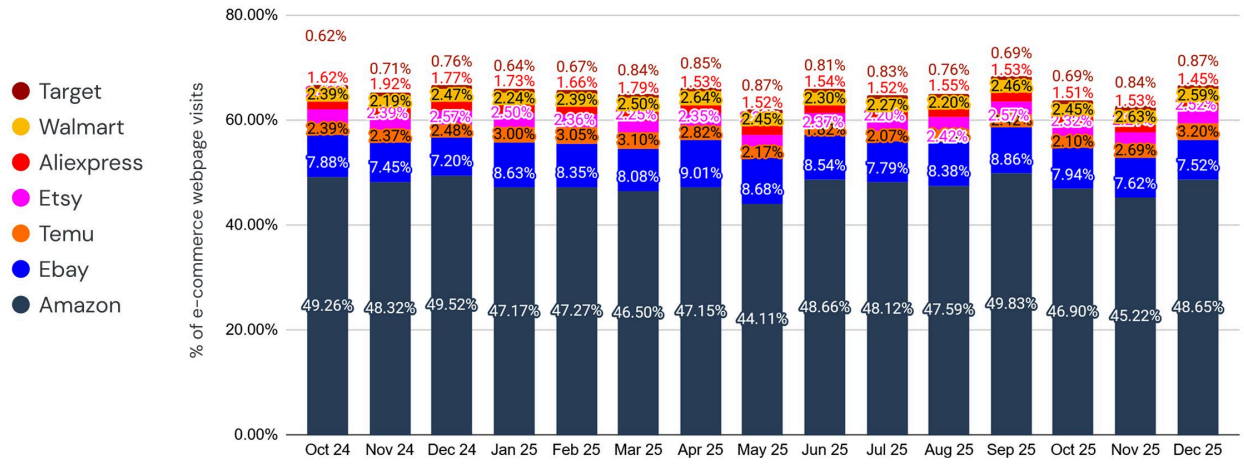
*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100%*

SparkToro

Source: Datos

Datos A Semrush Company

Share of desktop e-commerce webpage visits in the US



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

SparkToro

Source: Datos

Datos A Semrush Company

E-commerce activity on desktop remained stable throughout Q4 2025, with no major shifts in platform dominance or user engagement. Seasonal patterns were visible toward the end of the year, but these did not materially alter the overall structure of the market.

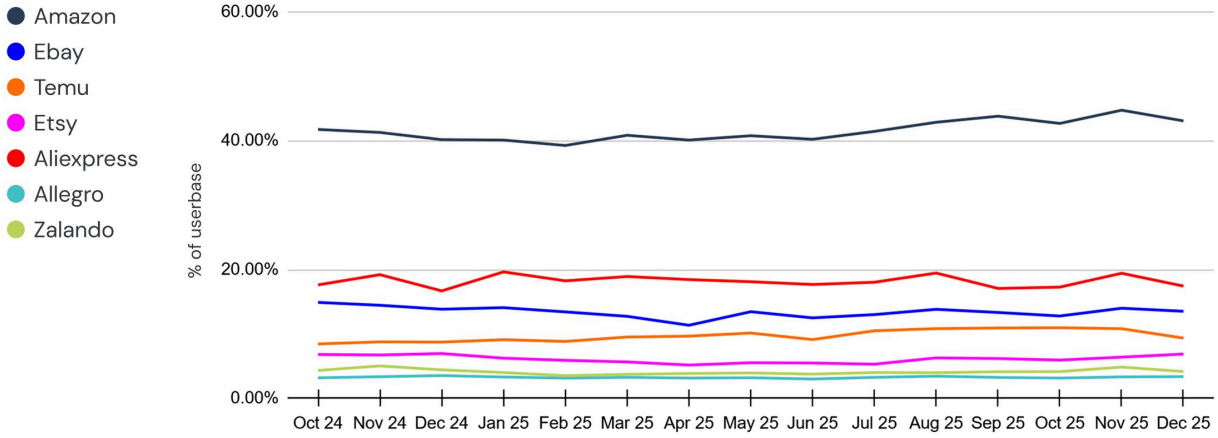
Amazon continued to lead by a wide margin, accounting for the largest share of both users and visits, consistently reaching 44-50% of desktop users. After modest seasonal softening earlier in the year, Amazon's engagement recovered somewhat by the end of Q4.

eBay and Walmart formed a consistent second tier fluctuating around 13–15% and 11–14% respectively, with limited long-term change. Etsy remained a mid-tier player, with steady but comparatively lower engagement.

Visit share followed a similar pattern. Amazon captured the largest portion of desktop e-commerce visits. The increase in December is consistent with seasonal shopping behavior, though year-on-year comparison shows a slight downward trend. Other platforms showed limited volatility.

Overall, US e-commerce behavior in Q4 reflects continuity rather than disruption, with incremental changes.

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



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SparkToro

Source: Datos

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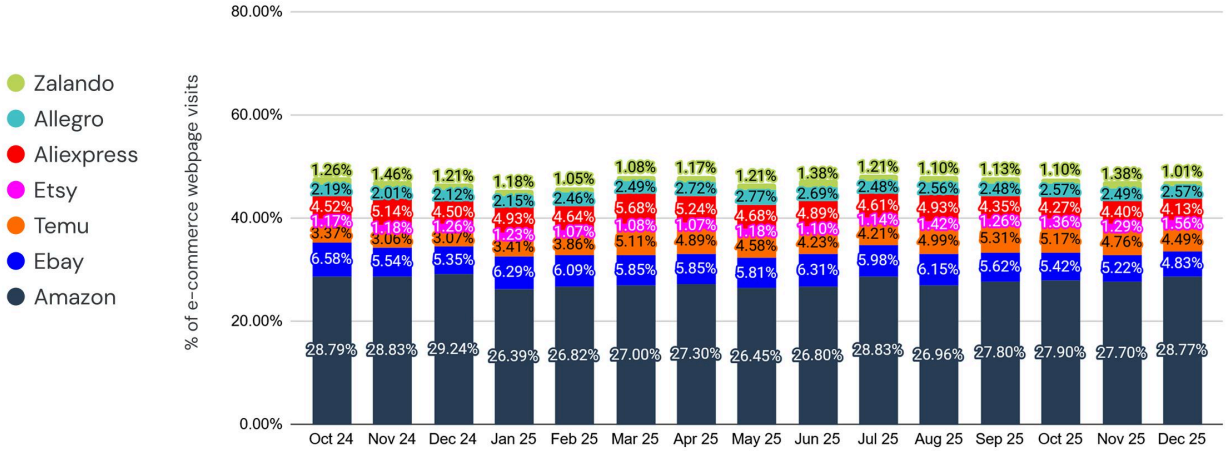
Share of desktop e-commerce webpage visits in the EU & UK



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

SparkToro

Source: Datos

Datos A Semrush Company

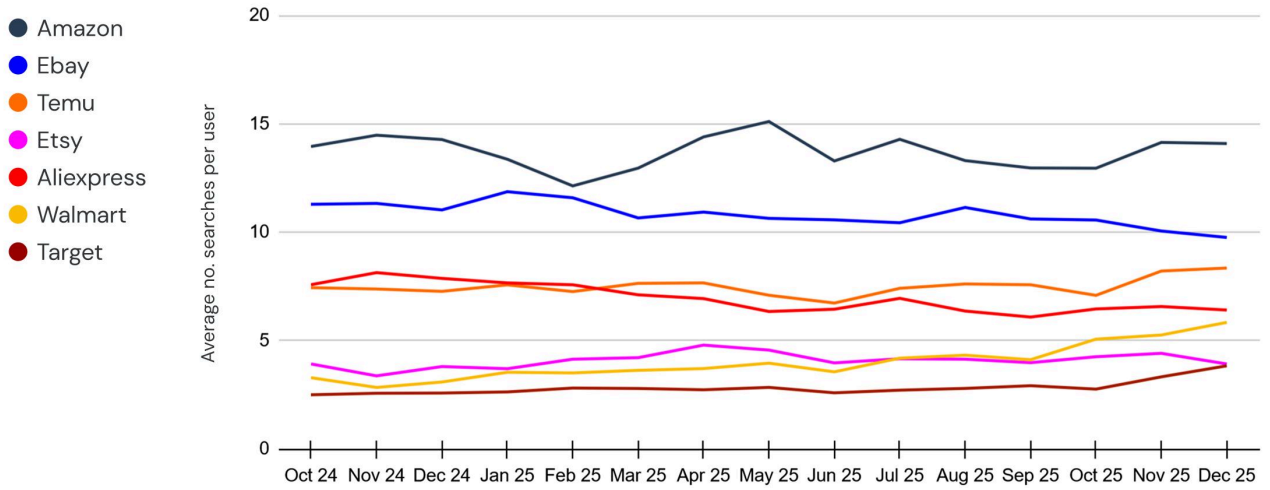
In the EU and UK, desktop e-commerce behavior also showed limited variation through Q4 2025, though with a more distributed competitive landscape than in the US.

Amazon continued to lead in both user share and visits, but with a smaller margin relative to other platforms. AliExpress and eBay formed a strong second tier, showing greater month-to-month variability than their US counterparts. Temu, Etsy, Allegro, and Zalando maintained consistent positions, reflecting a more regionally diverse e-commerce ecosystem.

User engagement patterns were steady across the quarter, with no sharp seasonal spikes. Search intensity and visit share suggest that European users continue to rely on a broader mix of regional and global platforms, rather than consolidating activity around a single dominant retailer.

As in the US, the data points to normalization rather than acceleration, with established platforms retaining their roles and only modest rebalancing within the long tail.

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

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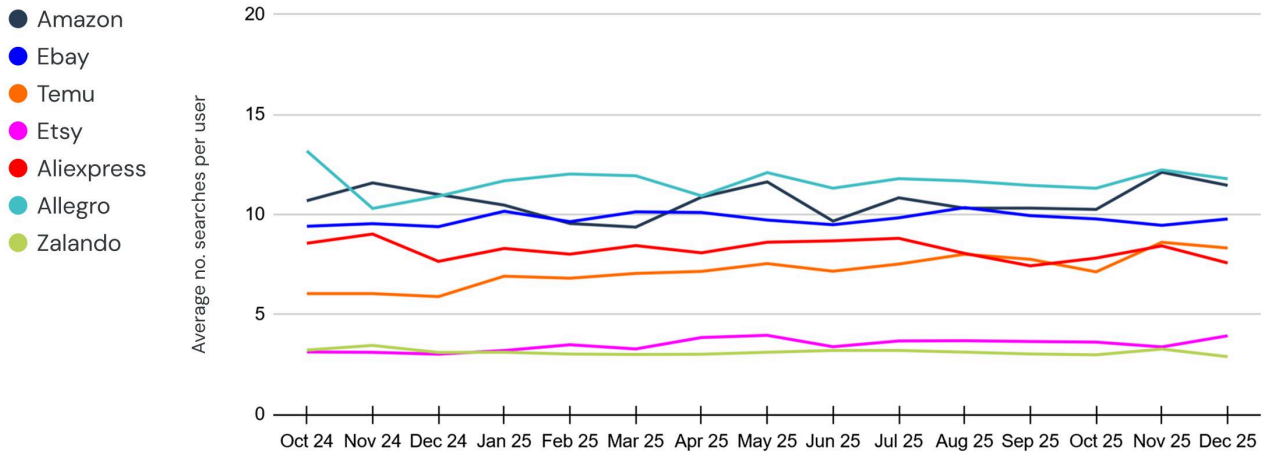
Amazon showed the highest search intensity throughout the period, with users performing 12–15 searches per month. Engagement varied modestly but remained consistently elevated.

eBay ranked second, averaging 9–11 searches per user, with little variation over time.

Temu and AliExpress formed a mid-tier, with users averaging 6–8 searches per month. Walmart and Etsy showed lower intensity but gradual growth, reaching 4–5 searches per user by late Q4.

Overall, US e-commerce search intensity held steady, with clear separation between high- and lower-engagement platforms.

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

SparkToro

Source: Datos

Datos
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In Europe, Amazon didn't dominate in search intensity as clearly as in the US, with Allegro often overtaking, averaging approximately 9–12 searches per user.

eBay, AliExpress, and Temu formed a consistent mid-tier, with users performing 6–10 searches per month. Etsy and Zalando remained lower-intensity platforms, with engagement levels holding steady throughout the period.

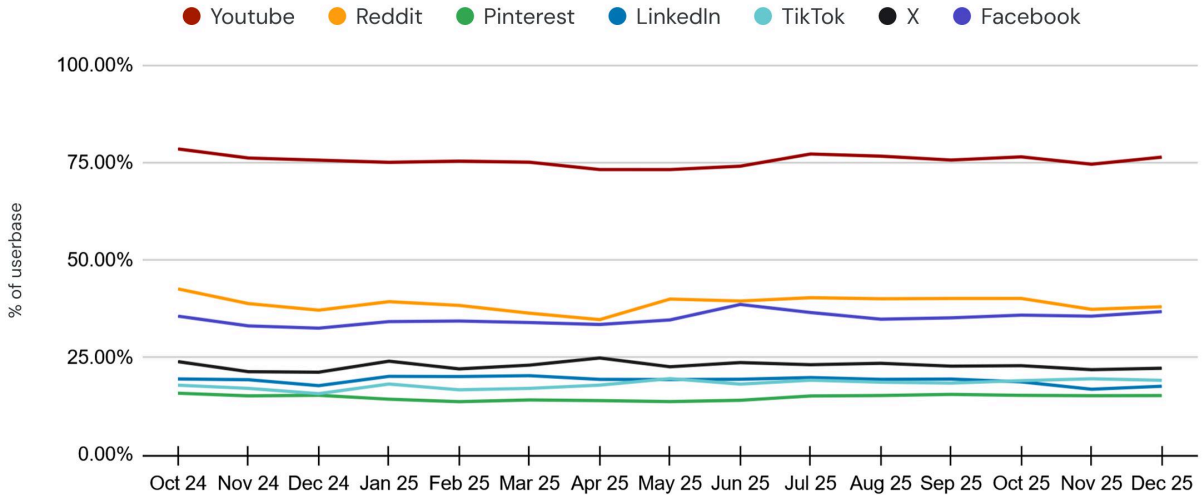
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

My biggest surprise was Target's impressive growth in e-commerce in Q4 in the US. They've long been stagnant, and their same-store sales have been seriously suffering (ostensibly from political choices made in the last couple years). But, it appears they're doing something right in the e-commerce world to have the only growing quarter in a very competitive, stable market. Etsy was also on a slight rise the last year, but it appears that growth has plateaued, or even stalled-out.

State of social content platforms search

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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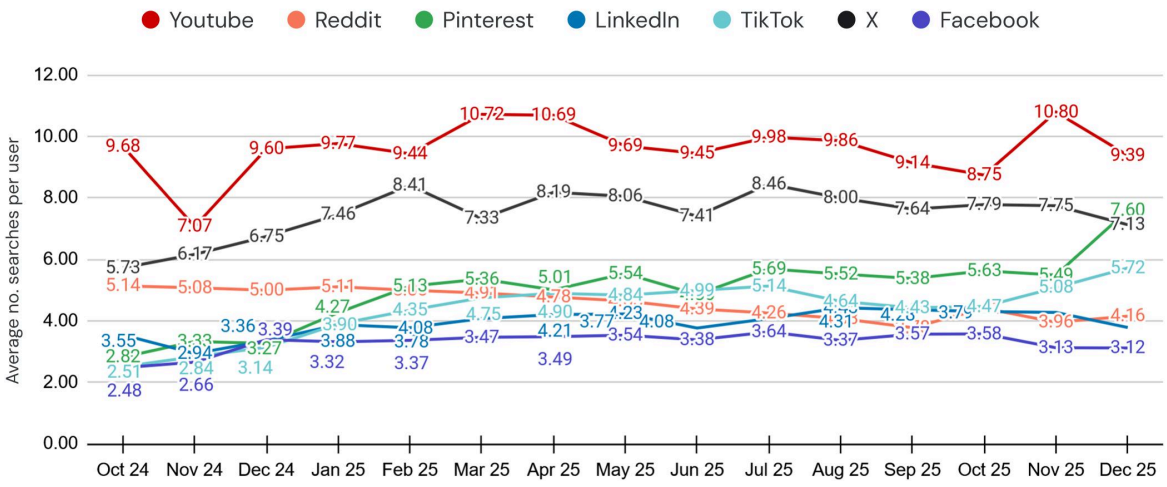
Searches per US desktop user on content platforms



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

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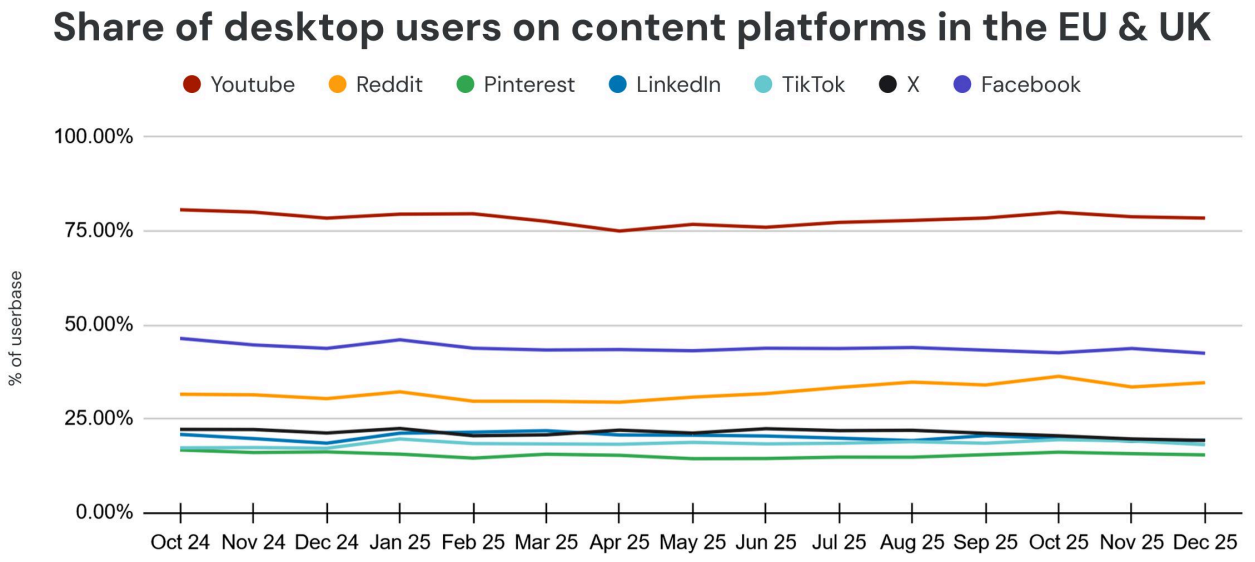
YouTube remained the dominant destination for social content platform search, reaching the largest share of users by a wide margin. Its position was stable throughout the period, reinforcing its role as both a content destination and a search engine in its own right.

Reddit and Facebook formed a consistent second tier, while TikTok and Instagram maintained smaller but persistent shares. Search intensity further differentiates engagement patterns:

YouTube users performed significantly more searches per user than any other platform, while X showed relatively high but volatile search activity. Pinterest exhibited a gradual increase toward the end of the year. Reddit, LinkedIn, TikTok, and Facebook remain lower-intensity, possibly because of more feed-led than search-led behavior.

Overall, the US content platform landscape remained highly concentrated, with limited change in platform hierarchy.



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SparkToro

Source: Datos

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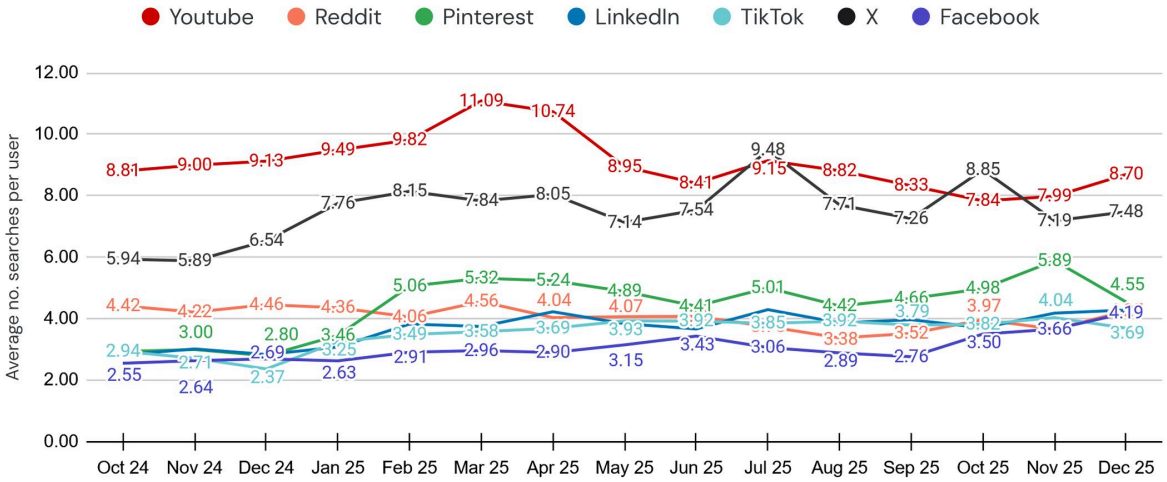
Searches per EU & UK desktop user on content platforms



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

SparkToro

Source: Datos

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In the EU and UK, content platform search patterns closely mirrored those in the US. YouTube again led by a wide margin, with stable user reach throughout Q4.

Reddit, Facebook, and Instagram followed as secondary destinations, while TikTok maintained a consistent position.

Search intensity followed similar dynamics, with YouTube clearly leading and X coming in second and even overtaking YouTube in July and October. Other platforms showed lower, stable engagement. The overall structure of content platform search remained mature, with minimal volatility across the quarter.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Pinterest and TikTok as rising search destinations wasn't on my prediction list, but given these charts, I'm going to be watching those more closely. The flat graphs on usage aren't especially surprising (social's a very competitive, mature space), nor are the slight declines for Twitter/X and the slight rise for Reddit.

Key Takeaways

Desktop search behavior remains stable and mature

Q4 2025 showed normalization across platforms, with incremental shifts rather than major structural change.

Traditional search continues to anchor discovery

Platform hierarchy and engagement patterns remain largely unchanged, reinforcing the central role of established search engines.

AI tools are integrating into routine search behavior

Steady growth and increased destination visibility suggest AI is becoming a regular part of user journeys, not a transient trend.

Users are refining how they search, not where they search

Longer queries and stable search intensity point to deeper, more deliberate engagement within existing ecosystems.

E-commerce and content discovery show continuity with gradual diversification

Core platforms retain leadership while secondary destinations gain incremental visibility across regions.

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Get in touch to find out more applications of clickstream data

sales@datos.live

media@datos.live

datos.live

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 October – December 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