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SONATA INSIGHTS

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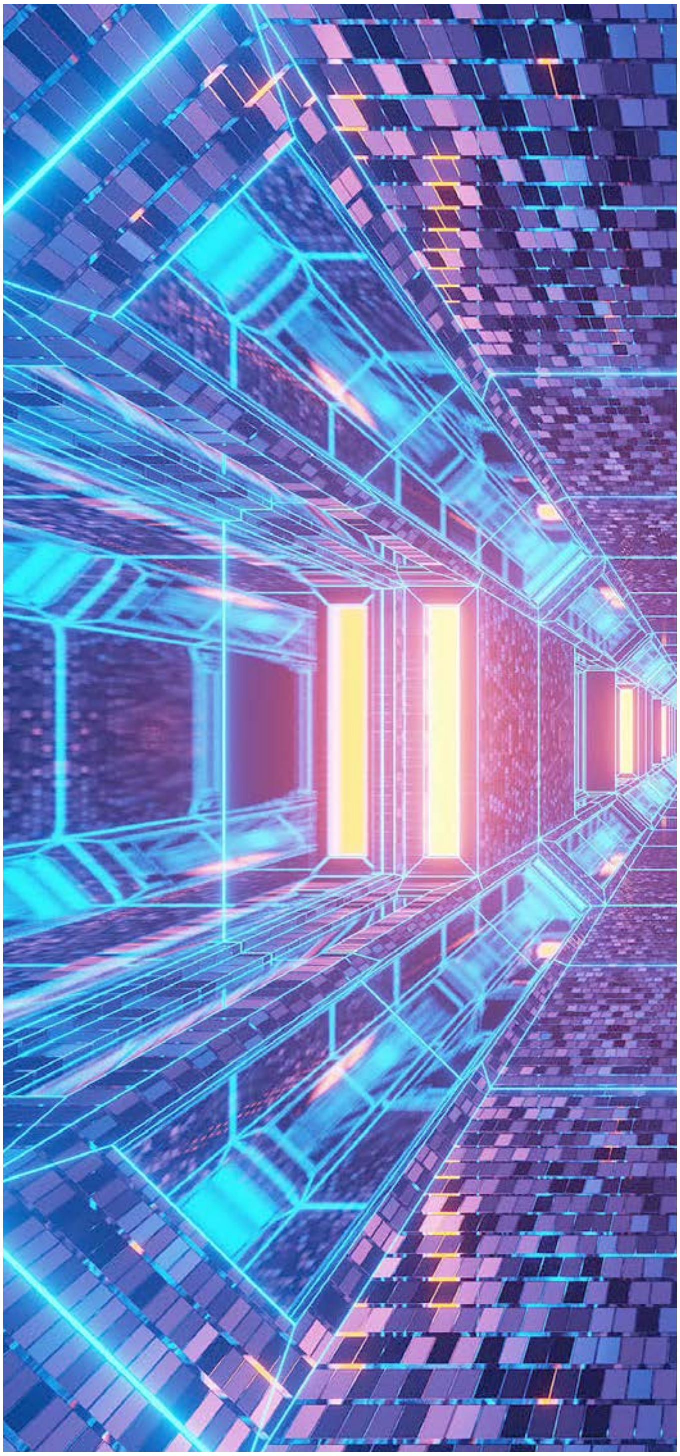
Consumer Search Behavior

What's Changing and What's Not in the Age of AI?



Generative AI is poised to revolutionize how consumers interact with search engines. Consider this: In a recent study, 37% of US respondents already consider AI-enhanced search results to be more satisfying than traditional methods, while 55% think search engines that incorporate AI will make it easier to discover products and services.

These numbers aren't just interesting—they're a clarion call to marketers. The way consumers search is evolving, and marketers need to start planning for how they will adapt their search optimization strategies and search ad spending.

To understand how consumer search behaviors are evolving, Sonata Insights analyzed exclusive desktop and mobile web browsing data from Datos, A Semrush Company. The analysis covers May 2023 to May 2024 and focuses on traditional search players (Bing, DuckDuckGo, Google and Yahoo!), AI-driven platforms (Open AI's ChatGPT, Anthropic's Claude, Microsoft's Copilot, Google's Gemini and Perplexity), social media platforms (Facebook, LinkedIn, Pinterest, Reddit, TikTok and YouTube), and retail giants (Amazon, eBay, Instacart, Kroger and Walmart).

So far, the impact of AI on web search activity is nuanced, not disruptive. While consumer behaviors are indeed shifting, we're not witnessing radical, irreversible trends yet. And Google is benefiting by offering a powerful trifecta: a traditional search engine, a companion AI platform and the top site for social search, YouTube.

Here are the five themes that emerged from our analysis:

1. Google remains in a powerful and dominant position.
2. AI search isn't yet the disruptive nemesis it's been portrayed to be.
3. Perplexity is a tiny but growing fish in the search pond.
4. The impact of social search may be smaller than advertised.
5. Retail search trends are stable—but AI looms.

Note:

This analysis focuses on desktop and mobile web activity. It does not include app data.

1. Google remains in a powerful and dominant position.

Google is by far the largest search player in the US, with significantly more monthly web search users than any other property in our study. That's been the case for many years, and its dominance is a huge asset when it comes to the evolution of search.

But size can also be a disadvantage. When you own a significant portion of the market, as Google does, it's incredibly difficult to tear down the infrastructure that got you to that point. Google will garner nearly 70% of US traditional search ad spending this year, according to EMARKETER. Its biggest challenge in the months ahead will be to keep search users from going elsewhere for their search needs—which could translate to lower search revenue.

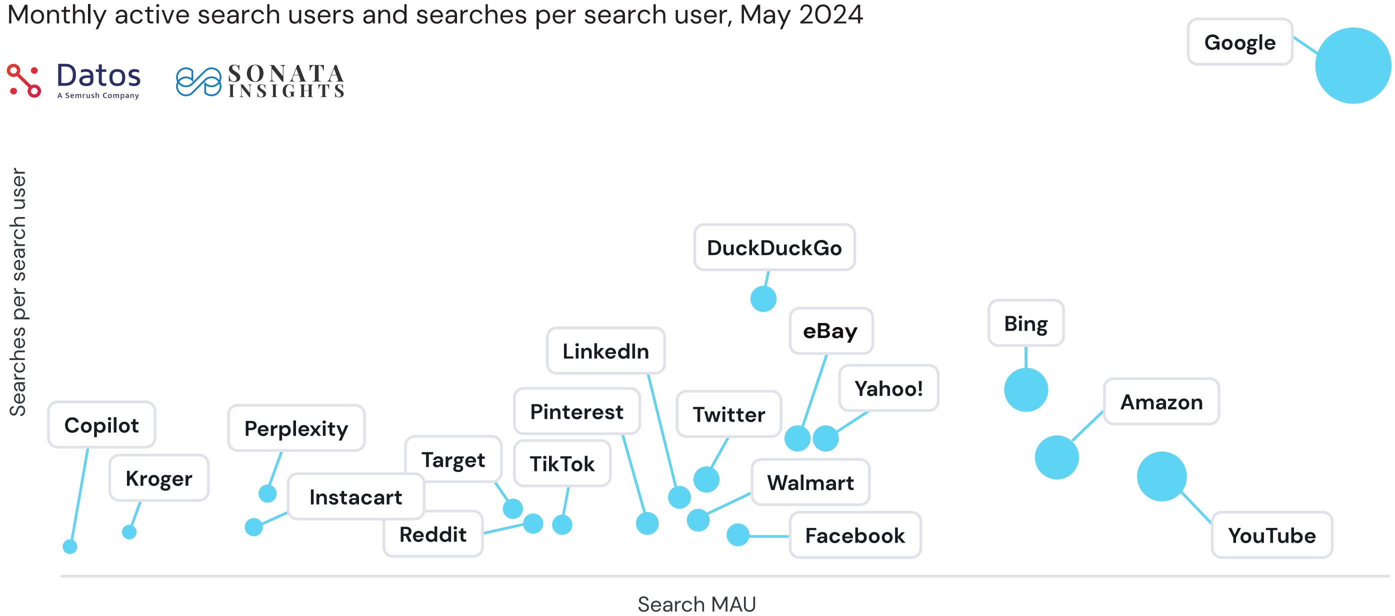
For now, though, Google's metrics are strong.

- **Share of traffic:** Google's share of the combined desktop and web traffic for the properties in our study remained essentially the same between May 2023 and May 2024. The percentage of users who searched was also relatively unchanged over the course of the year.
- **Searches per month:** The average number of searches per desktop search user is rising, reaching 109.9 in May 2024, up 10.4% from May 2023. The number of searches per mobile search user stood at 51 in May 2024, about the same as the previous year.
- **Search frequency:** Google web users searched on more days per month than users of the other traditional search engines did. Over the 13 months of our study, desktop Google users searched an average of 10.3 days per month, compared to 9 for DuckDuckGo, 6.8 for Bing and 5 for Yahoo!.
- **Vs. Amazon:** In May 2024, Google had more than 4.5x the number of monthly web search users as Amazon, the largest of the retail search properties in our study.
- **Vs. Facebook:** In the same month, Google had nearly 25x the number of search users as Facebook, the largest of the non-Google-owned social media search properties in our study.
- **Vs. Perplexity:** Google had more than 290x the number of search users as Perplexity, the AI search platform, in May.

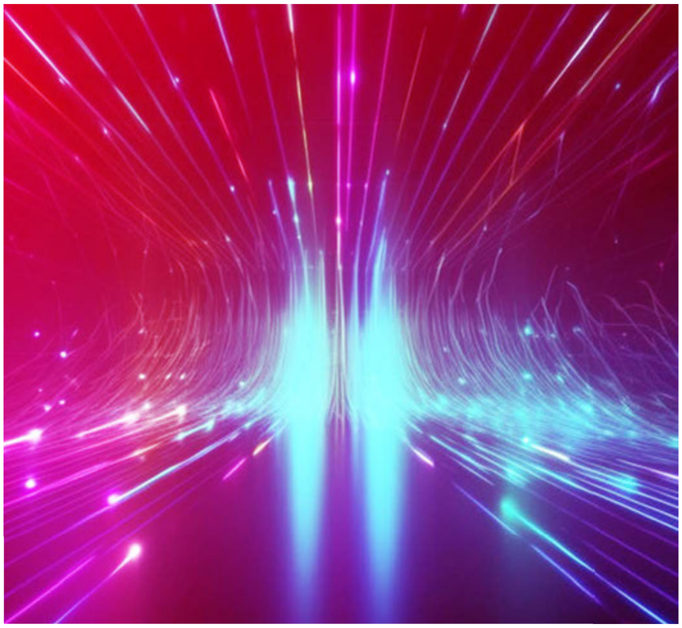
Another way Google dominates is by owning YouTube. It was the second largest web search property in our study.

Search activity on major platforms

Monthly active search users and searches per search user, May 2024



Note: Among US desktop and mobile and web users. Bubble size corresponds to search MAU.
Source: Datos, A Semrush Company



2. AI search isn't yet the disruptive nemesis it's been portrayed to be.

AI platforms are already starting to transform the way consumers learn, conduct research and evaluate potential purchases—and the implications for search marketers are growing.

To understand how ChatGPT, Claude, Copilot, Gemini and Perplexity are developing relative to traditional search engines, we analyzed the numbers in three ways:

1. We identified a cohort of people who had used a traditional search engine (either Google, Yahoo!, Bing or DuckDuckGo) at least once in March, April and May 2023 and analyzed their desktop web activity through May 2024. The goal was to evaluate the extent to which this cohort is adopting AI platforms.

2. We assessed the change in monthly active desktop and mobile web users of AI platforms. This provides an indicator of how quickly they are growing.

3. We calculated the average number of monthly webpage visits per desktop user for the AI platforms and compared that to the same metric for Google. This gives us a measure of the depth of engagement with AI vs. Google.

Here are our findings:

AI platform adoption

The percentage of traditional search engine users who also use AI platforms has grown in the past year, but remains in the low double-digits. In May 2024, 16.45% of this cohort used at least one of the AI platforms in our study. That was up about 2 points from May 2023.

February 2024—the month Google rebranded its AI services as Gemini—was an inflection point. The percentage of search users who also used AI platforms surpassed 16% for the first time and stayed at or above that level through the end of the study period. This indicates that while Gemini helped boost consumer usage of AI platforms, it also helped keep people within the Google fold.

Importantly AI platform users didn't give up on their old methods: 99% also continued to use traditional search engines.

From this cross-visitation analysis, we can see that a small—but growing—proportion of active web search users are using AI platforms *in addition to* traditional search. However, the data does not provide any indication that these users are using AI *instead of* traditional search.

Percentage of US active search users who also use AI platforms

May 2023 vs. May 2024

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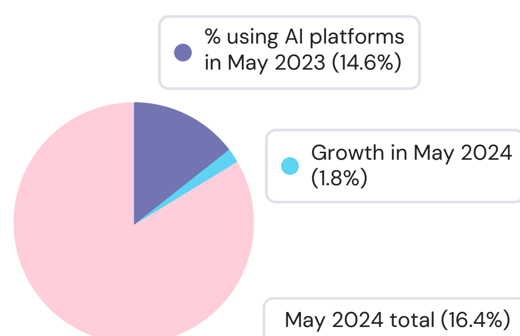


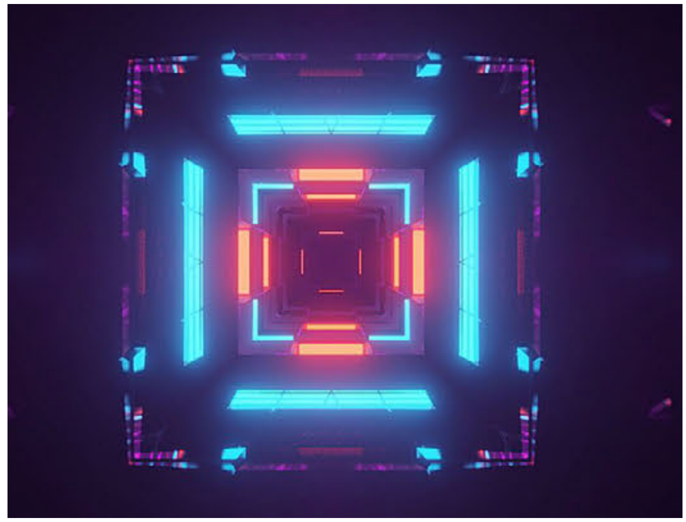
Note: Analysis is based on a cohort of active traditional search website users (Bing, DuckDuckGo, Google or Yahoo!) who also visited an AI chatbot website (ChatGPT, Claude, Copilot, Gemini or Perplexity).

Source: Datos, A Semrush Company

Change in monthly users

Nearly all of the AI platforms are experiencing substantial increases in mobile and desktop MAU, which isn't surprising given how new they are. However only ChatGPT has a user base that comes close to some of the other search incumbents.

- ChatGPT, by far the largest of the five, saw combined desktop and mobile web MAU growth of 25% between May 2023 and May 2024.
- The total number of monthly active users of Perplexity increased 3.4x in the same time period.
- Claude.ai's total MAUs rose 107% since the website launched in July 2023.
- Copilot's total MAUs rose 8x since Microsoft unified its AI experiences under Copilot in November 2023.
- Google's Gemini is the outlier; its MAUs fell by 3% between February 2024, when Google rebranded its AI services under the Gemini name, and May 2024. The decline may have been due to Gemini users starting to access it via app, or as a built-in feature on Android phones.



Events per desktop user

Our final evaluation focused on events per desktop user, or the number of webpage visits per month. Here, the disparity between the AI platforms and Google is abundantly clear.

Google users racked up an average of nearly 200 events per user per month over the 13 months of our study. Among AI sites, engagement was dramatically lower; for example Perplexity desktop users averaged just 15 events per month and ChatGPT users just 12.2.

Webpage visits per month per desktop user, Google vs. AI sites
May 2023-May 2024

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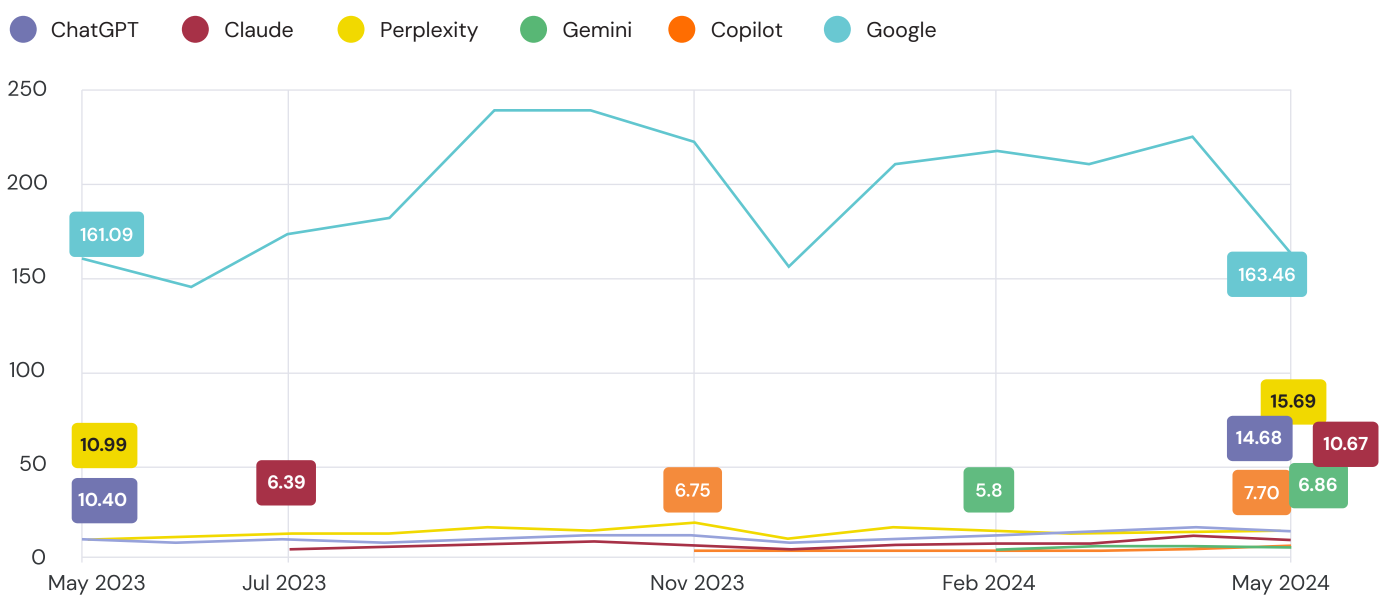


Source: Datos, A Semrush Company

3. Perplexity is a tiny but growing fish in the search pond.

While all generative AI platforms have the ability to challenge the search incumbents, the platform that is currently most search-like is Perplexity. Here is how its usage is evolving:

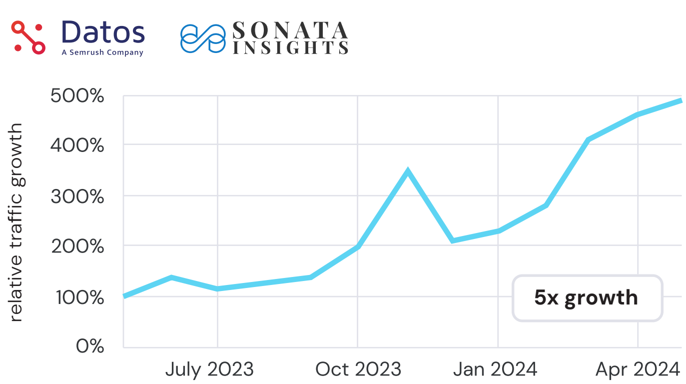
- **Perplexity's media presence far outstrips the size of its web user base.** It gets a lot of press both for its enhancements (such as the recent move to add Wikipedia-like Pages) as well as its challenges (such as the criticism that it scrapes website data without the owner's permission). But while Perplexity's web user base has grown more than 3x in the past year, it was just 3% of the size of ChatGPT and a minuscule 0.38% of Google in May 2024.

- **Perplexity's user engagement regularly tops that of ChatGPT.** Measured by the average number of desktop webpage visits per user per month, Perplexity ranked ahead of ChatGPT for 11 of the 13 months of our study.

- **Its share of searches is growing rapidly.** Perplexity's share of desktop search traffic among the properties in our study increased nearly 5x between May 2023 and May 2024. But it's still a tiny fraction of Google, where web users conducted 2,400 times more searches in May 2024.

Growth in Perplexity's share of desktop search traffic* relative to May 2023

May 2023-May 2024



*Note: *among the traditional, social, retail and AI search platforms studied. Read as "Perplexity's share of desktop search traffic has increased 5x in May 2024 compared to May 2023."*

Source: Datos, a Semrush Company

4. The impact of social search may be smaller than advertised.

AI search may be getting all the buzz in mid-2024, but what about social search? One year ago, it was the one making headlines.

Social search is still worth keeping an eye on. Twitter and TikTok both saw increases in search activity year over year. But overall, the percentage of social users who search on a social media website and the number of searches performed each month remain low, except on YouTube.

It's true that some search activity takes place on social media apps, but all the social platforms in our study have sizable web user bases from which we can draw conclusions. The types of searches may vary from those conducted in-app, however, because some features—TikTok Shop, for example—are only available via app.

Here are our findings:

Percentage of users who search

YouTube has the highest percentage of social searchers—more than 4 in 10 desktop or mobile users searched on YouTube in May 2024. Pinterest ranked second, at 24.4%.

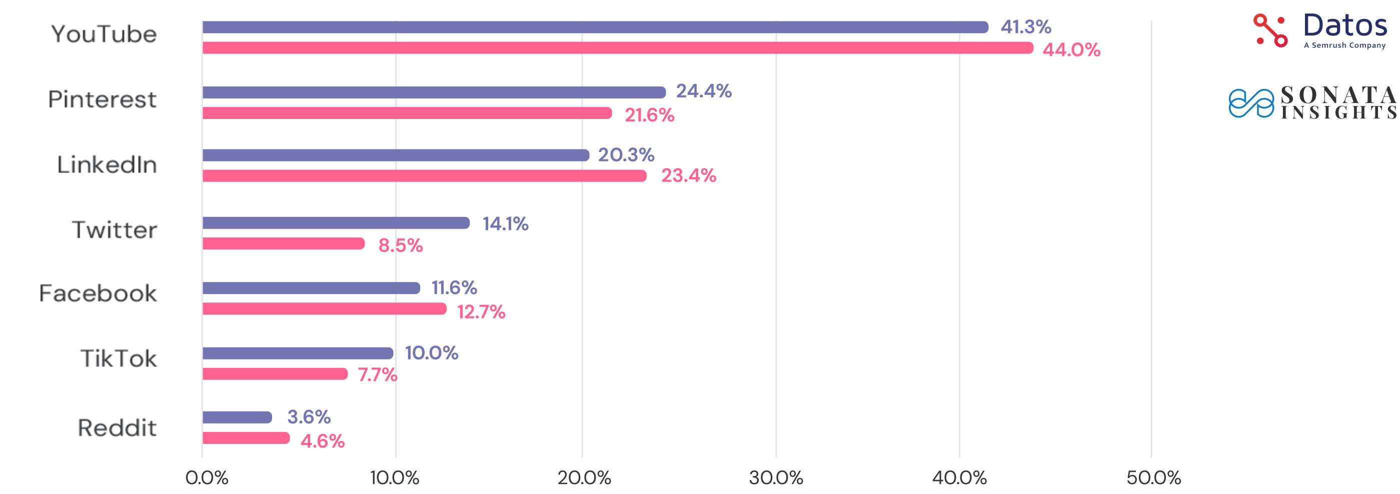
But the percentage of searchers fell slightly in the past year on YouTube, as well as on LinkedIn, Facebook and Reddit.

The trend was different on Twitter. It experienced significant growth in web search users over the course of the year, reaching 14.1% in May 2024, up from 8.5% in May 2023.

Search usage on Pinterest and TikTok was also up year over year. In the case of TikTok, the desktop was the primary driver. As high as 15.4% of monthly active desktop users were search users in recent months, up from 11% in May 2023.

Social search users by platform

% of each site's users who searched in May 2023 and May 2024



Note: Among US desktop and mobile website users
Source: Datos, A Semrush Company

Searches per search user

The intensity of social search activity (the average number of desktop or web searches performed by a social search user in a month) has remained more or less the same for most platforms over the past year. This may be a more important indicator than the percentage of users who search, because it shows the depth of engagement with social searching.

YouTube is the most-searched social platform, with an average of 19.9 searches per search user per month over the course of our study. LinkedIn had the second highest average, at 13.3.

However, Twitter and TikTok saw notable increases in this metric:

- **Twitter:** The number of searches per search user on Twitter's desktop and mobile websites grew consistently over the year, from 5.4 in May 2023 to 13.4 in May 2024, a nearly 150% increase. This growth, combined with the fact that a higher percentage of Twitter users are searching on Twitter, indicates that users are engaged with seeking and finding content that is relevant to them.

- **TikTok:** The number of desktop/mobile web searches per search user rose from 3.7 in May 2023 to 5.3 in May 2024, peaking as high as 8.3 in March 2024.

Average number of searches per search user per month on major social platforms

May 2023–May 2024

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Platform	Average
YouTube	19.9
LinkedIn	13.3
Twitter	8
Pinterest	5.5
TikTok	4.6
Facebook	4
Reddit	3.9

Note: US mobile and web users
Source: Datos: A Semrush Company

5. Retail search trends are stable—but AI looms.

Search is a vastly important functionality for retail ecommerce companies. In a 2023 study by Nosto, 69% of US and UK consumers said they were at least somewhat likely to make the search bar their first stop when they visited an ecommerce site.

For marketers, retail search is also growing in importance as an ad venue. More than half of new US search ad dollars entering the market this year will go toward search ads on retail media properties, according to EMARKETER.

Over the past year, web search trends were fairly stable for our basket of sites. A few platforms, such as Amazon, experienced slight declines year over year, but these weren't consistent enough (or dramatic enough) to be a definitive trend. And searches per search user have stayed relatively consistent, or in some cases increased.

AI chatbots will eventually make more of a dent in retail search behaviors, but it will take another year (or more) for the data signals to become more clear.

Here are the key findings from our analysis:

Percentage of users who search

Among the retail sites in our analysis, Amazon had the strongest search usage; 66.4% of desktop users performed a search in May 2024. But the percentage of searchers fell by a couple of points year over year (eBay and Kroger also saw a decline). Meanwhile, Instacart and Target remained stable, while search usage grew a few points on Walmart.

In Amazon's case, the decline in search usage started in December 2023, even as its desktop MAU soared thanks to the holiday shopping rush. It's possible these holiday shoppers came to the site because of paid ads or affiliate shopping links directly to a purchase page, or from Amazon's own holiday promotions on its home page. But the fact that search usage didn't fully recover in the succeeding months is something to watch.

One way retail sites might be able to stabilize search behaviors is to convince users to visit more often.

Those who visited Amazon's website more than once a month in May were more likely to be searchers (83.3%). The same was true for eBay (78% of frequent visitors searched vs. 56.4% of all MAU in May), Instacart (79% vs. 44.6%), Kroger (49% vs. 29.1%), Target (61% vs. 36.4%) and Walmart (68% vs. 41.5%).

Searches per search user

The average number of desktop searches per search user remained more or less the same over the past year for four platforms—Instacart, Kroger, Target and Amazon.

However, users of eBay and Walmart increased their searches—eBay from an average of 21.3 in May 2023 to 23.3 in May 2024, and Walmart from 4.7 to 6.7. Walmart had similarly high search event counts in August and September 2023, perhaps linked to back-to-school shopping.

Mega-events drive increased search activity. Amazon desktop users performed a greater number of searches during the two Prime Day months (July and October 2023) and in November (the start of holiday shopping season) than they did at other times of the year.

Takeaways for Marketers

AI search is grabbing headlines, but it's not the disruptive nemesis it's been portrayed to be.

Google is still a powerhouse.

It is showing stability in two important metrics—its share of US web search traffic and number of searches per search user. Google is an essential platform for search marketing and search advertising.

AI platform usage is growing, but engagement is low.

The percentage of traditional web search users who also use an AI platform reached 16.45% in May 2024, up about 2 percentage points from May 2023. However, AI platforms, including ChatGPT, had far fewer webpage visits per user than Google.

Perplexity has a long way to go to challenge Google.

The AI search engine's share of desktop search traffic rose nearly 5x in the past year, but Perplexity's web user base is less than 1% the size of Google.

The biggest social search site is YouTube.

More than 40% of YouTube's web users searched on the site in May 2024. It also had the highest average number of searches per month over the past year among social sites in our study. But overall, the percentage of social users who search on a social media website and the number of searches performed each month remain low.

Big events and frequent visits help boost retail search activity.

Amazon experienced increased web search activity during the months it held Prime Day sales. And users who visited a retail site more than once a month were more likely to be searchers.

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About Sonata Insights

Sonata Insights is a custom research and advisory service focusing on social media and AI. Sonata Insights was founded in 2024 by Debra Aho Williamson, an internationally recognized expert in digital marketing and social media. Previously, Debra served as a principal analyst at EMARKETER, where she led the social media research practice for 17 years.

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's US panel, representing a diverse and statistically significant sample of users, and covers the months of May 2023 to May 2024. For further information please review our Privacy Policy.

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