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State of Search Q1 2025:
Behaviors, Trends, and Clicks Across the US & Europe

Q1 2025

Introduction

The state of search has never been static. It's a moving target shaped by shifting platform features and user expectations.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

But… there's "always moving," and there's what's happening now, which is definitively different from the last 20 years. For the first time in decades, there's real competition to Google's monopoly, and the fear that's sparked inside Google has meant massive upheaval in how they answer trillions of queries.

With the rapid rise of AI in the last two years, search is changing faster and more profoundly than ever. In the past year in particular, the emergence of AI-powered search engines like Perplexity and OpenAI's SearchGPT have reshaped how people look for information.

Google's AI Overviews feature is now well established, with LLM-generated summaries at the top of their SERPs. Google also introduced AI Mode, a new search experience that offers an interactive, conversational interface designed to guide users through complex queries and tasks. As this feature rolls out more widely, we'll be analyzing its impact on user behavior. But these developments are already changing the game for content discovery.

Against this backdrop, Datos' 2024 - Q1 2025 state of search report, based on panel data from the US and Europe, reveals a granular and regionalized picture of how search is actually being used, from Google's share of search events, to developments in zero-click behavior, and search intent. We will also take a look at AI search, e-commerce search, and major content platforms.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

If you've been looking for sane, data-backed, provable assertions about what's actually happening on the web (at least, the desktop web), this study is for you. It's sobering, it doesn't pull punches, but it's also rooted in reality, devoid of the infuriatingly common AI hype-cycle of fear mongering and sky-is-falling clickbait. This is the report you need to read, filled with the graphs you'll be copy+pasting to your team, clients, and boss next time they overreact to a misleading headline. And, on a personal note – I'm proud to be part of this effort from Datos to make real numbers about what real people do on the web transparent, accessible, and freely available to all.

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) over the entirety of 2024 and the first quarter of 2025.

It includes:

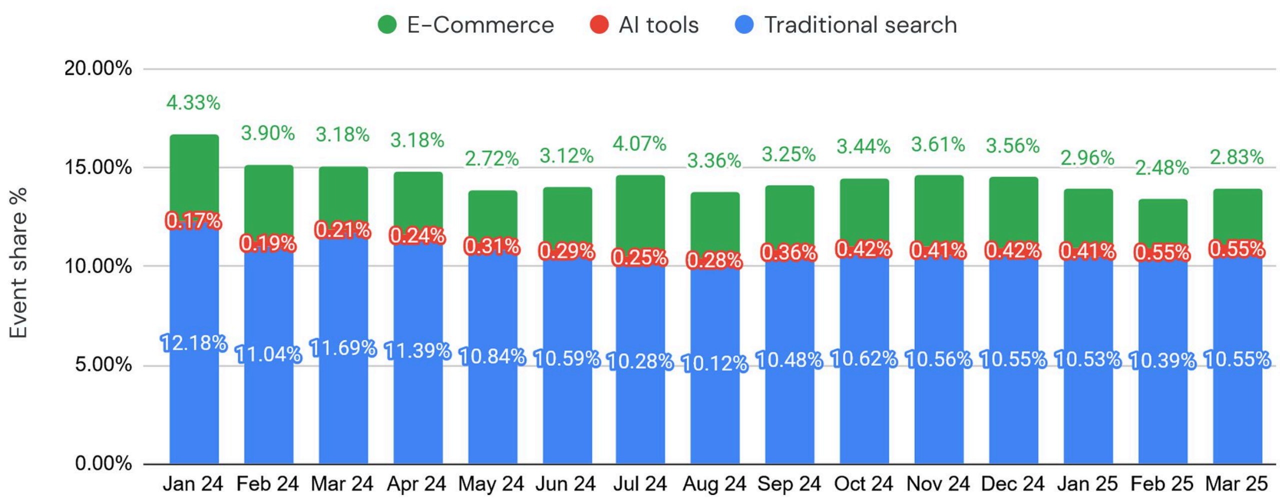
- **Key insights** into platform share, search behavior, and content engagement across the US and Europe
- **Emerging trends** including zero-click growth, shifts in search intent, and regional contrasts in platform usage

Traditional search, AI, and e-commerce

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

Search, AI, and E-Commerce platform visits in the US

The share of overall desktop events for e-commerce, AI tools, and traditional search platforms for our US panel



*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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As can be observed from the chart, in the US the number of events happening on AI platforms grew consistently from the beginning of 2024 through to the end of Q1 2025. Meanwhile traditional search has seen a slight decline, but still retains a much greater share of overall user activity, and e-commerce site activity sees minor fluctuations month-on-month.

Rand's Take

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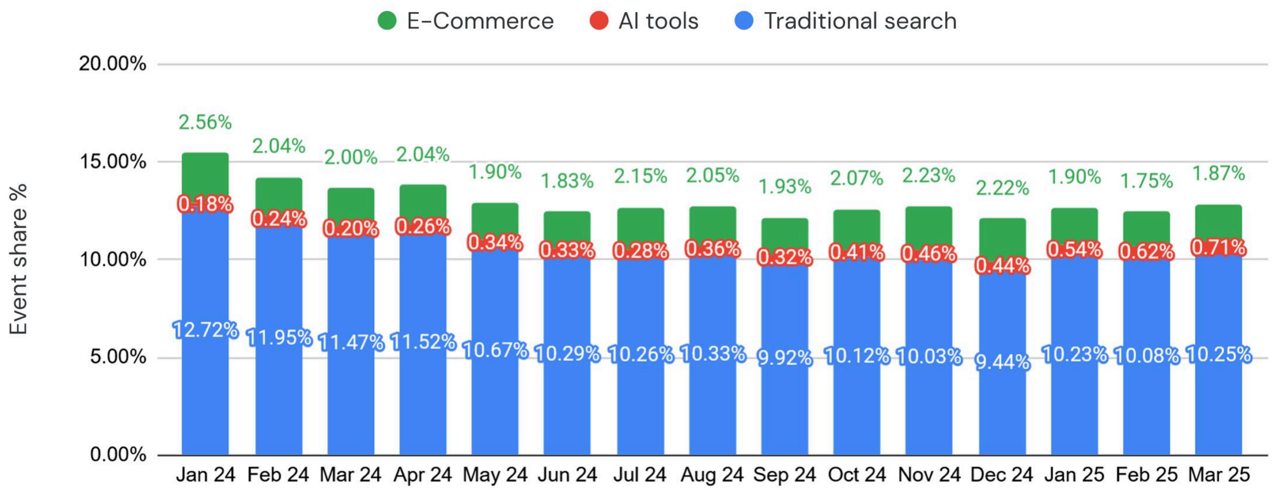
SparkToro Co-founder & CEO

This is the high-level chart you want to send your boss/team/client/that-one–guy-on-LinkedIn next time there's fearmongering about the death of traditional search or the abandonment of e-commerce platforms in favor of AI-centric discovery. Yes, AI tools are popular, and yes, they're growing. But despite the media hype, AI is still a tiny fraction of overall usage in the US, EU, and UK.

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

The share of overall desktop events for e-commerce, AI tools, and traditional search platforms for our EU & UK panels



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

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

Meanwhile in Europe, though these platforms saw a slightly smaller share of events, they had a similar pattern in the same time period, with AI events steadily increasing, a slight decline in traditional search, and e-commerce seeing minor fluctuations.

The increase in AI usage is unsurprising, though it is clear from the data that traditional search engines are still seeing the lion's share of search activity.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

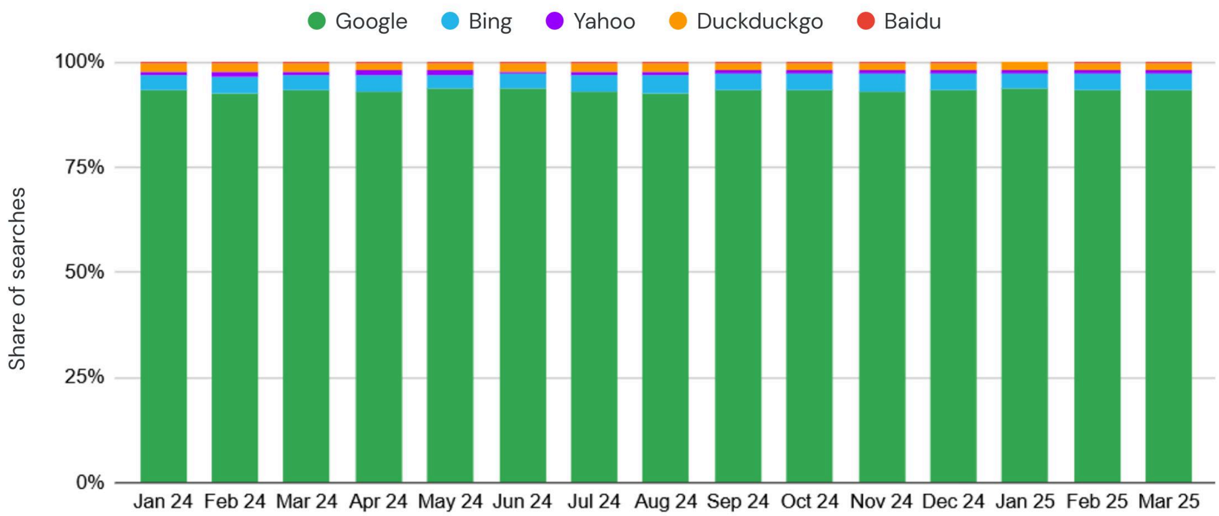
I find it fascinating that EU+UK desktop users visit AI tools more than their American counterparts; that is likely to surprise many prognosticators who believe the US is always the "early adopter" of such tech.

State of traditional search

We examined how the top 5 biggest "traditional" (non-AI) search engines have been faring since the beginning of 2024 through to the end of Q1 2025.

Desktop web search in the US

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

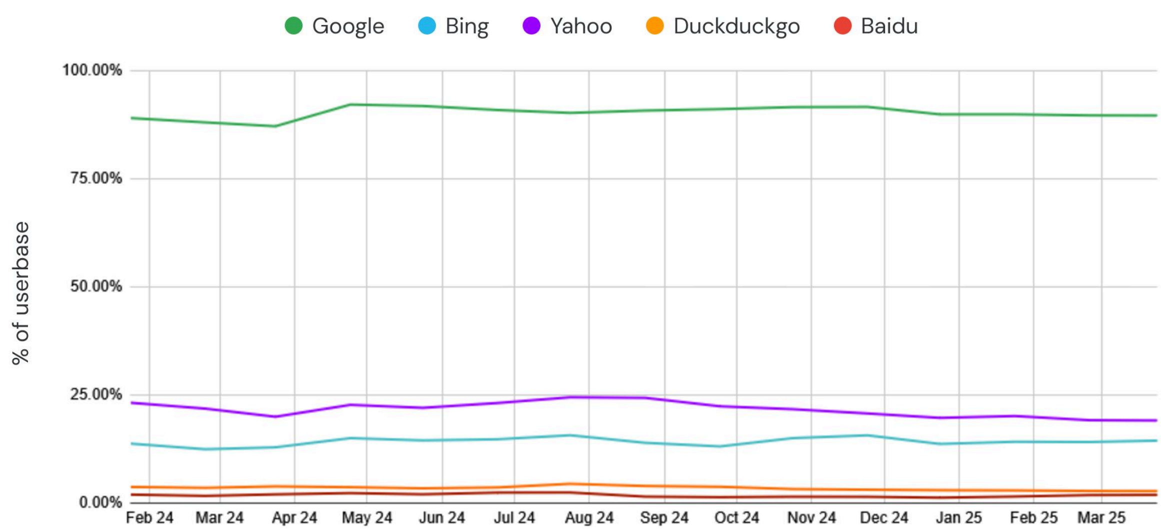


*Share of Searches = Sum of unique searches per user per day on a given domain, during the month / Sum of unique searches per user per day across all domains in the same category, during the month * 100*

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

Share of desktop web search users in the US

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

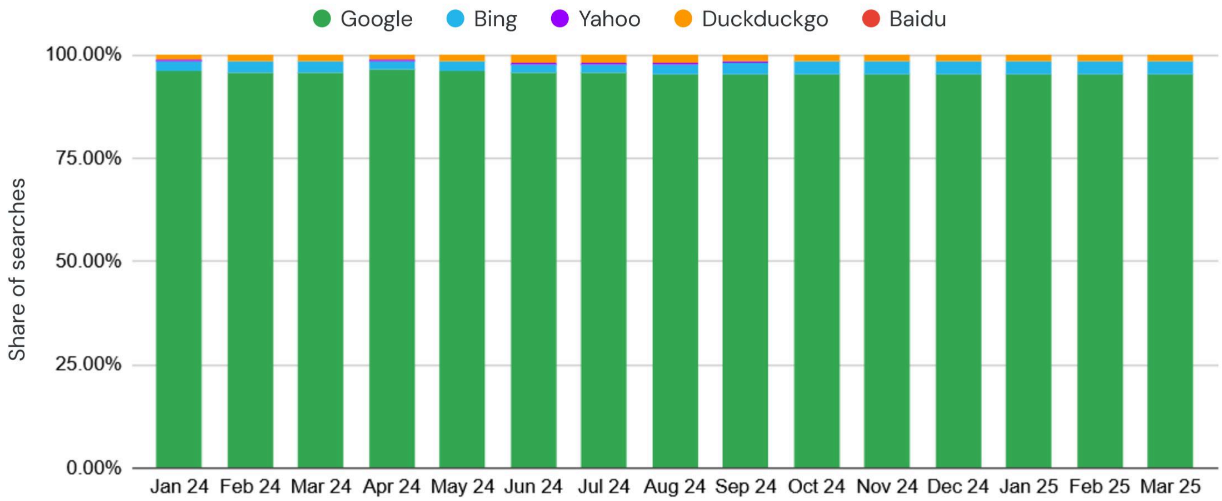


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100*

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

Desktop web search in the EU & UK

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



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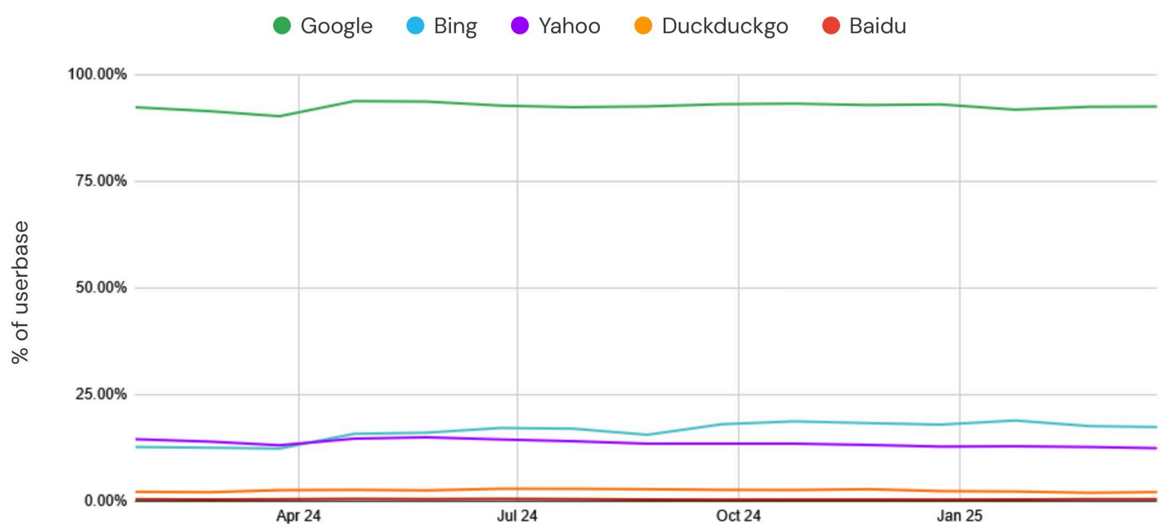
SparkToro *Source: Datos* Datos A Semrush Company

Share of desktop web search users in the EU & UK

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



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

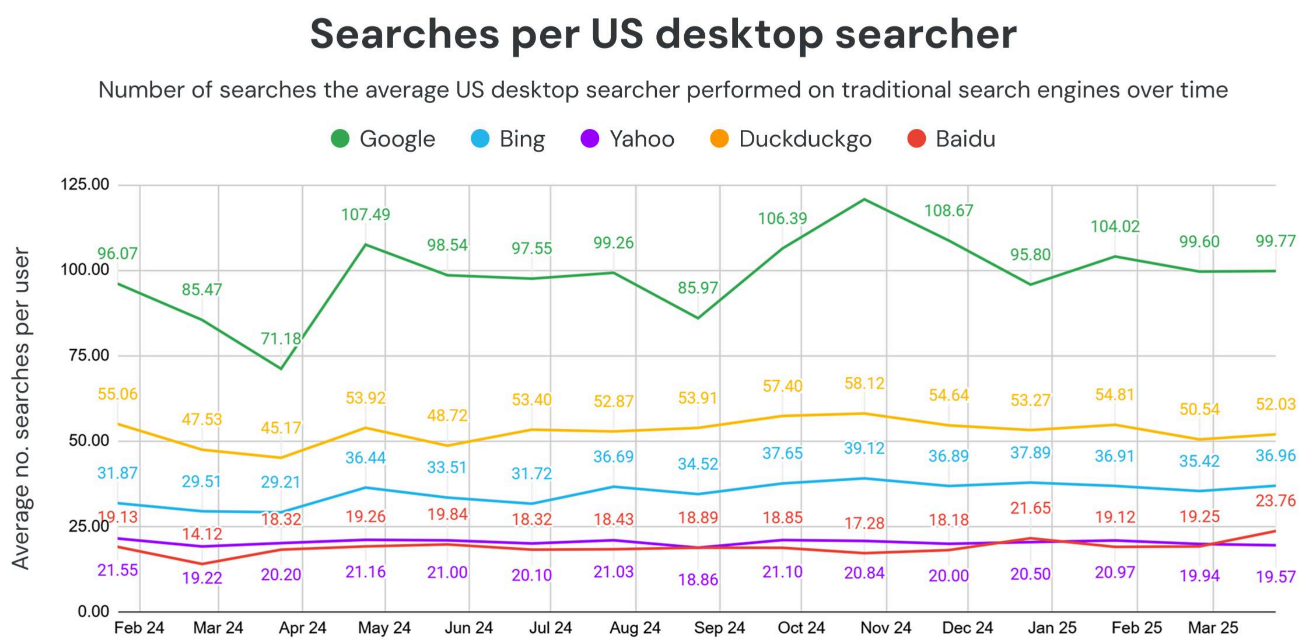
SparkToro *Source: Datos* Datos A Semrush Company

Unsurprisingly, Google continues to dominate in the traditional search engine space on both sides of the Atlantic. As can be seen in the graphs, the percentage share of search volume (calculated as page views) remained stable across platforms and regions over the year and quarter.

When it came to actual searches performed on each of these platforms, Google took the lead as expected in both the US and Europe. However, though Bing came second in terms of page views, DuckDuckGo logged a higher average number of searches per user, almost doubling that of Bing in Europe.

Europe showed similar patterns, though DuckDuckGo, Yahoo, and Baidu had fewer searches on average over time compared to the US.

Though Yahoo lagged behind Bing in both regions in terms of search volume, it had a greater share of the userbase in the US throughout 2024 and into Q1 2024, while in Europe Yahoo dropped behind Bing midway through 2024.



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

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Source: Datos

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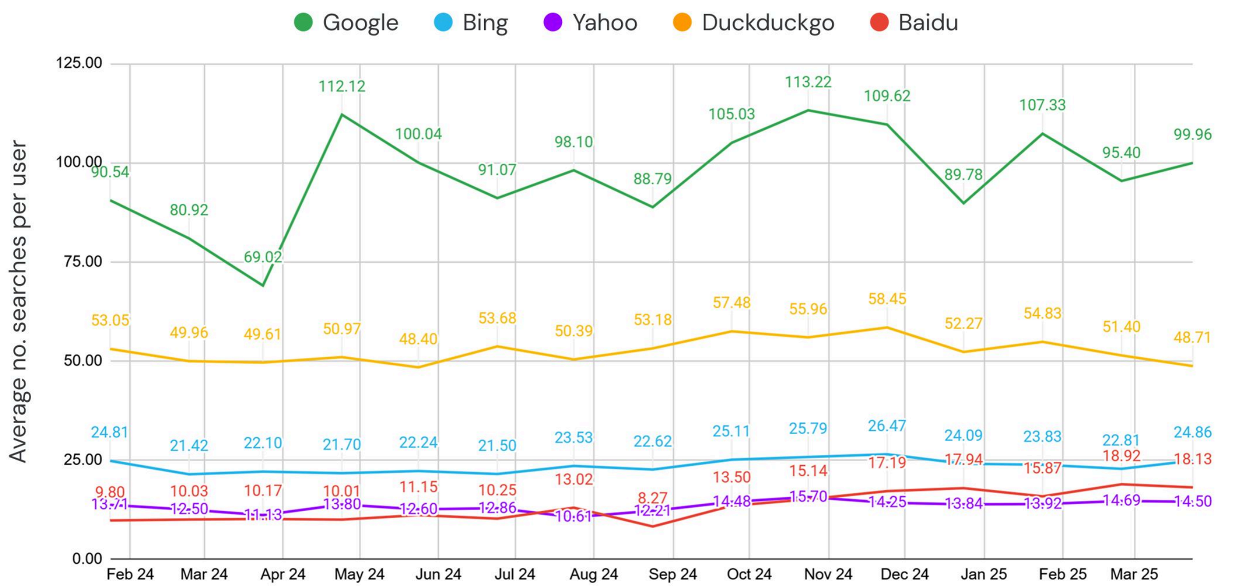
Searches per EU & UK desktop searcher

The number of searches the average EU & UK desktop searcher performed on traditional search engines over time



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

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Source: Datos

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Rand's Take

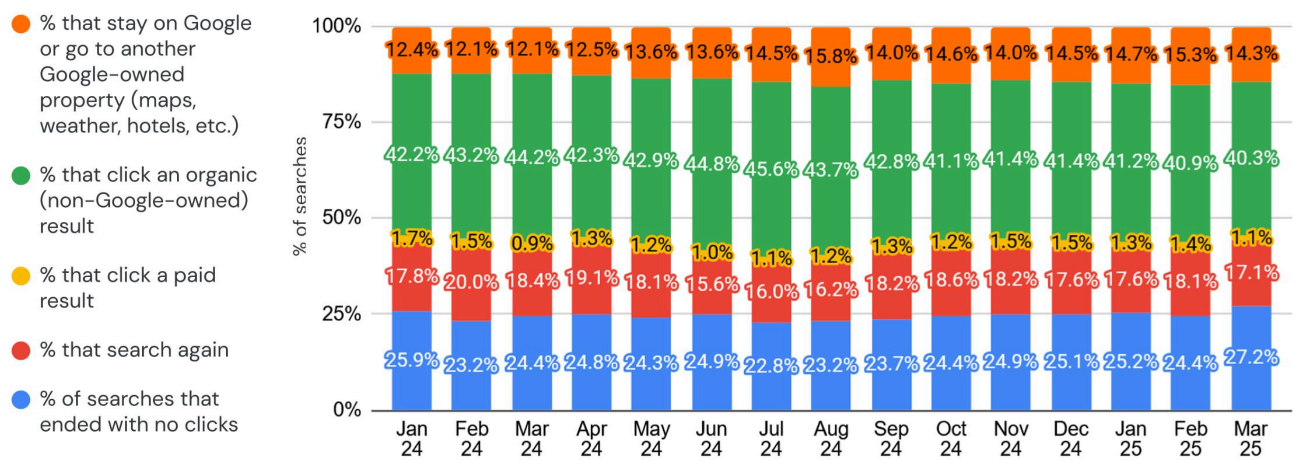
Rand Fishkin
SparkToro Co-founder & CEO

If the headlines of Google's death were true, the share of searches/searchers would decline, as would total visits. Neither are true, and we can see from this data that Google's statements from their Q1 earnings report have 3rd-party validation. Despite all the threats from AI, Google grew query volume by multiple ChatGPTs in 2024.

What about where searches ended up? We examined where Google searchers were clicking through to (or not) once they performed their searches.

Distribution of Google US desktop search clicks over time

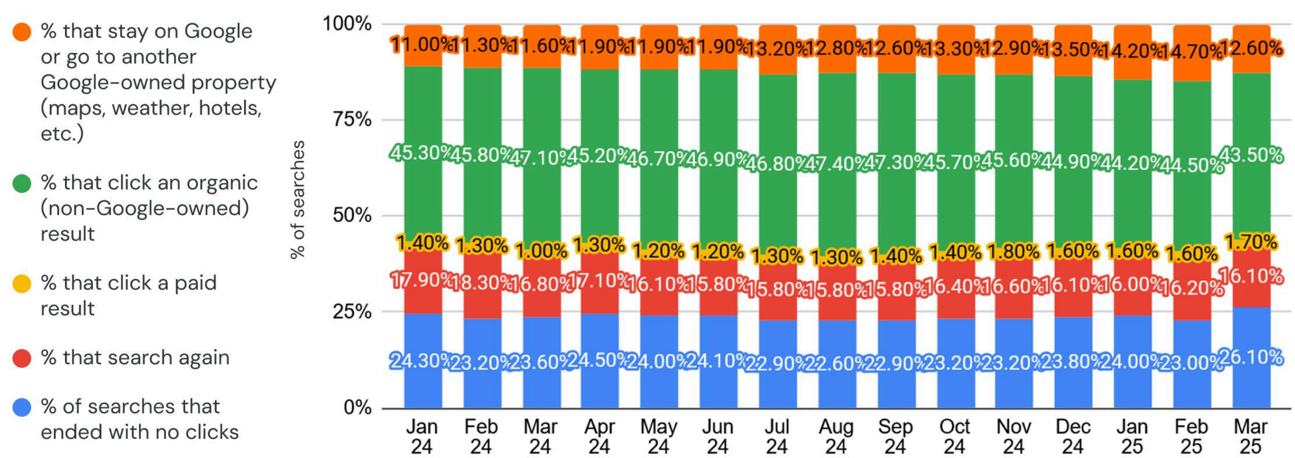
What happens, on average, after desktop web users in the US search Google



SparkToro | Source: Datos | Datos A Semrush Company

Distribution of Google EU & UK desktop search clicks over time

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



SparkToro | Source: Datos | Datos A Semrush Company

As you can see from the chart, in both the US and Europe, the most common action following a search was to visit a webpage outside of Google that was not a result of a paid advertisement – classified as an organic click. The proportion of searches ending this way remained stable from January 2024 through to March 2025.

The second most common post-search activity was not clicking anywhere, aka “zero-click” search results. This proportion too remained fairly stable over time, with a slight increase in both regions by March 2025. The Google AI overviews launch began in the US in May 2024; a logical assumption would be that zero-click searches would increase after this. But as we see from both charts, that wasn’t the case. If anything, zero-click searches dipped a tiny bit in the three months following. However, the rollout of AI Overviews has been gradual and it’s still early days; only time will reveal the true impact of this new feature. (More on AI Overviews here)

Performing another search was the next most popular post-search action, followed by staying on Google but visiting another Google property (such as Maps, Shopping, etc.), and then clicking on a paid Google ad. These proportions also remained stable, with no major shifts throughout the entirety of 2024 and Q1 2025.

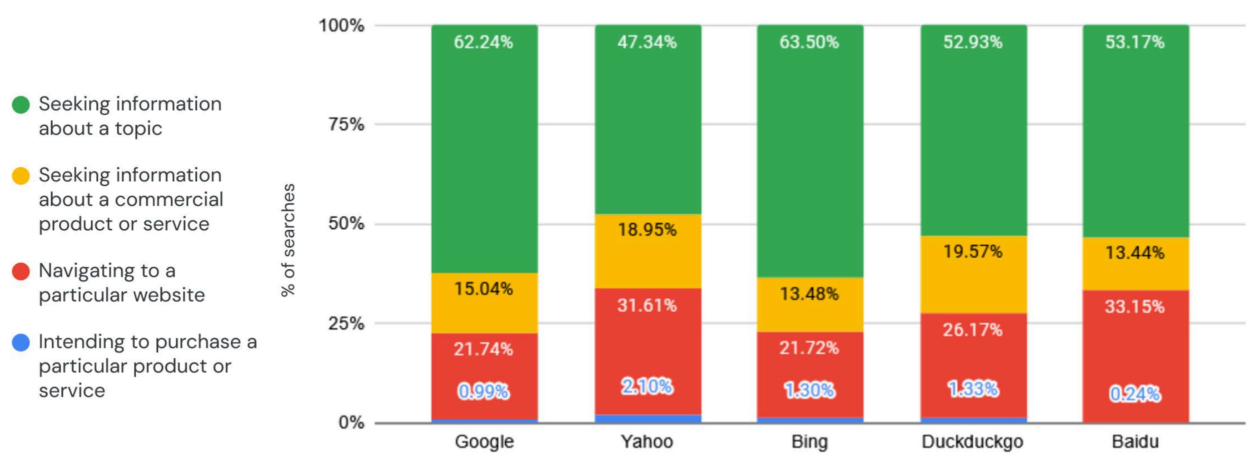
Rand’s Take

Rand Fishkin
SparkToro Co-founder & CEO

The scariest thing on this chart for content creators, website owners, and publishers is the size of that green bar – organic click opportunity has been steadily eroding for years, and while that trend isn’t growing massively, the data here suggests a slow, inexorable decline. Creators of all kinds would be wise to diversify how they influence audiences before Google completes their slow boil of the organic search traffic frog.

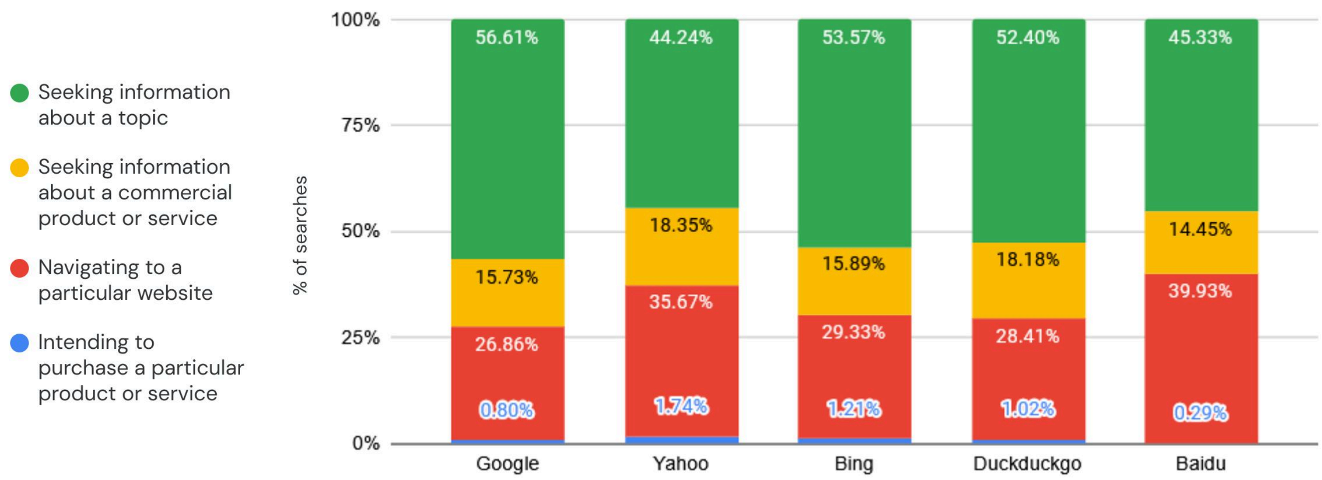
Seeing what searchers did after searching on Google, we were able to categorize their search intent by using our algorithm, powered by our embeddings.

Categorization of US desktop search intent in Q1 2024



Source: Datos

Categorization of EU & UK desktop search intent in Q1 2024



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Source: Datos

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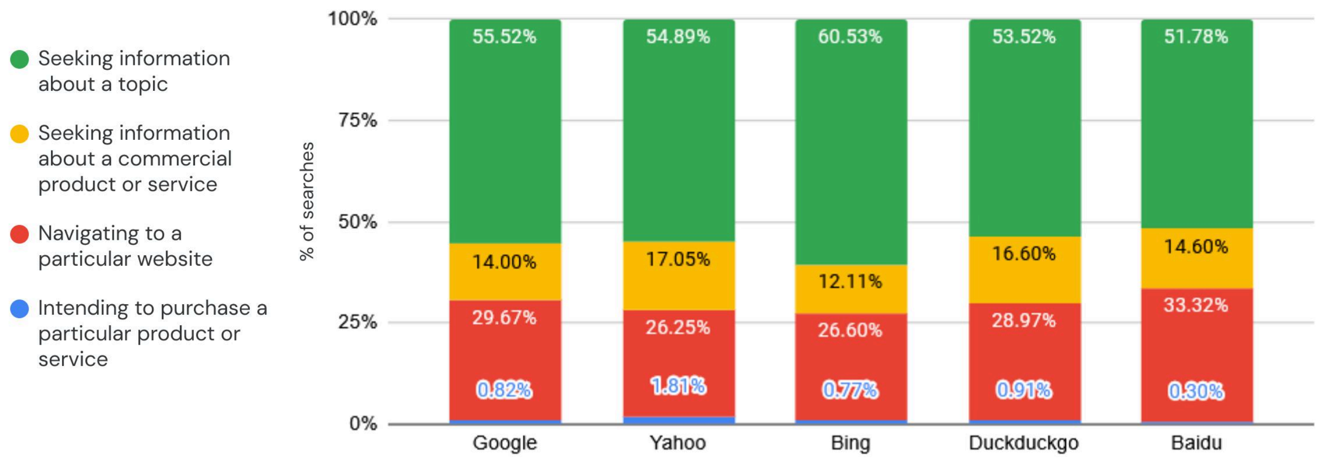
In Q1 2024 in both the US and Europe, informational searches were the most common across all the major search engines, particularly those searching for information about a specific topic. Navigational searches (in which users use search engines to navigate to a particular website rather than type in the URL) were the second-most common across the board, followed by commercial informational searches.

A small proportion of searches were made with the intention of purchasing a product or service. Interestingly, Yahoo was the search engine which had the most searches of this nature, particularly in Europe.

Google in Europe was used more for navigational searches compared to the US, while in the US Google had a greater proportion of informational searches. Indeed, this was true for almost all five search engines.

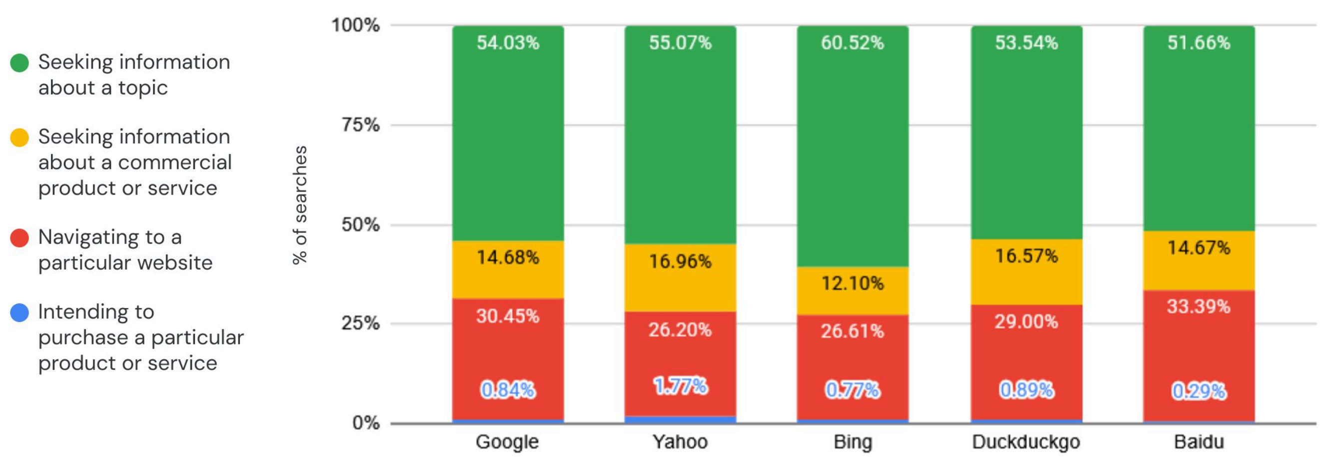
Q1 2025 saw the gap closing a little between regions, with informational searches in Europe increasing, and more US searches becoming navigational.

Categorization of US Desktop search intent in Q1 2025



Source: Datos

Categorization of EU & UK desktop search intent in Q1 2025



Source: Datos

Top US search destination domains Q1 2024 - Q1 2025

The tables below show the top external domains visited from search engines in Q1 2024 and Q1 2025 for US desktop users. The ranking was established relative to the total visits to the top domains displayed.

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

Top domains visited from US desktop traditional search engines

Q1 2024

Rank	Site name
1	reddit.com
2	youtube.com
3	wikipedia.org
4	amazon.com
5	facebook.com
6	instagram.com
7	twitter.com
8	linkedin.com
9	stackoverflow.com
10	quora.com
11	zillow.com
12	github.com
13	ebay.com
14	openai.com
15	google.com

Q1 2025

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

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Source: Datos

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US platform traffic shifts

- YouTube rose to the top spot from Q1 2024 to Q1 2025, becoming the dominant destination from traditional search.
- Reddit fell from the #1 spot to #3, but still remained a major traffic destination.
- Amazon dropped from #4 to #12 (however, Amazon's total traffic and YoY profit remained strong, as this ranking shows the domain traffic relative to the other domains in the top list).

AI and messaging surge

- ChatGPT.com's entry into the top 5 reflects the growing popularity of AI in the past year. (The ChatGPT.com domain was launched in November 2024; its previous URL openAI.com sat at #14 in Q1 2024).

- WhatsApp.com appeared at #6 in 2025.

Decline of traditional portals

- Sites like ebay.com and stackoverflow.com lost rank, possibly due to vertical-specific competition and shifting user intent.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I find this data particularly useful to identify when search engines are trying to obfuscate the need for a searcher to visit a domain. Amazon and Reddit, for example, have seen their content become fodder for so many "instant answers" (including AI Overviews) in Google, and this data suggests there may be risk to companies who are disintermediated by Google's ability to crawl, summarize, and present information directly to searchers.

Even more fascinating is how this loss of traffic (or at least, loss in share of traffic) seems not to be hurting these big players. My guess is Google's still sending them the "converting" users, and it's the "casual" browsers who are getting their answers directly from the search results page.

Top European search destination domains Q1 2024 - Q1 2025

The tables below show the top domains visited from search engines in Q1 2024 and Q1 2025 for European desktop users. The ranking was established relative to the total visits to the top domains displayed.

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

Q1 2024

Rank	Site name
1	youtube.com
2	reddit.com
3	facebook.com
4	wikipedia.org
5	instagram.com
6	twitter.com
7	stackoverflow.com
8	linkedin.com
9	github.com
10	openai.com
11	tiktok.com
12	google.com
13	microsoft.com
14	msn.com
15	xvideos.com

Q1 2025

Rank	Site name
1	youtube.com
2	facebook.com
3	reddit.com
4	instagram.com
5	chatgpt.com
6	wikipedia.org
7	x.com
8	whatsapp.com
9	google.com
10	github.com
11	msn.com
12	netflix.com
13	copilot.microsoft.com
14	linkedin.com
15	stackoverflow.com

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Source: Datos

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Europe platform traffic shifts

- YouTube stayed in the top spot across the year. Indeed, the top 5 domains in Q1 2025 were the same in the US and Europe.

Social platforms remain central

- Facebook, Reddit, and Instagram retained top 5 spots across both years, with only small shifts in traffic share.
- However, Instagram and Facebook both saw modest growth. Pinterest, meanwhile, fell off the top list.

The rise of AI

- ChatGPT.com entered the top 5 in Q1 2025, up from OpenAI.com's position at #10 the previous year.

Key takeaways for traditional search

AI is growing, but Google still dominates: Traditional search still had a much greater share of user events, with Google having the majority of those searches in both the US and Europe.

The average event share for Google in the US from Q1 2024 through Q1 2025 was 9.42%, while for ChatGPT it was 0.29%. In Europe it was 9.85% and 0.32% respectively.

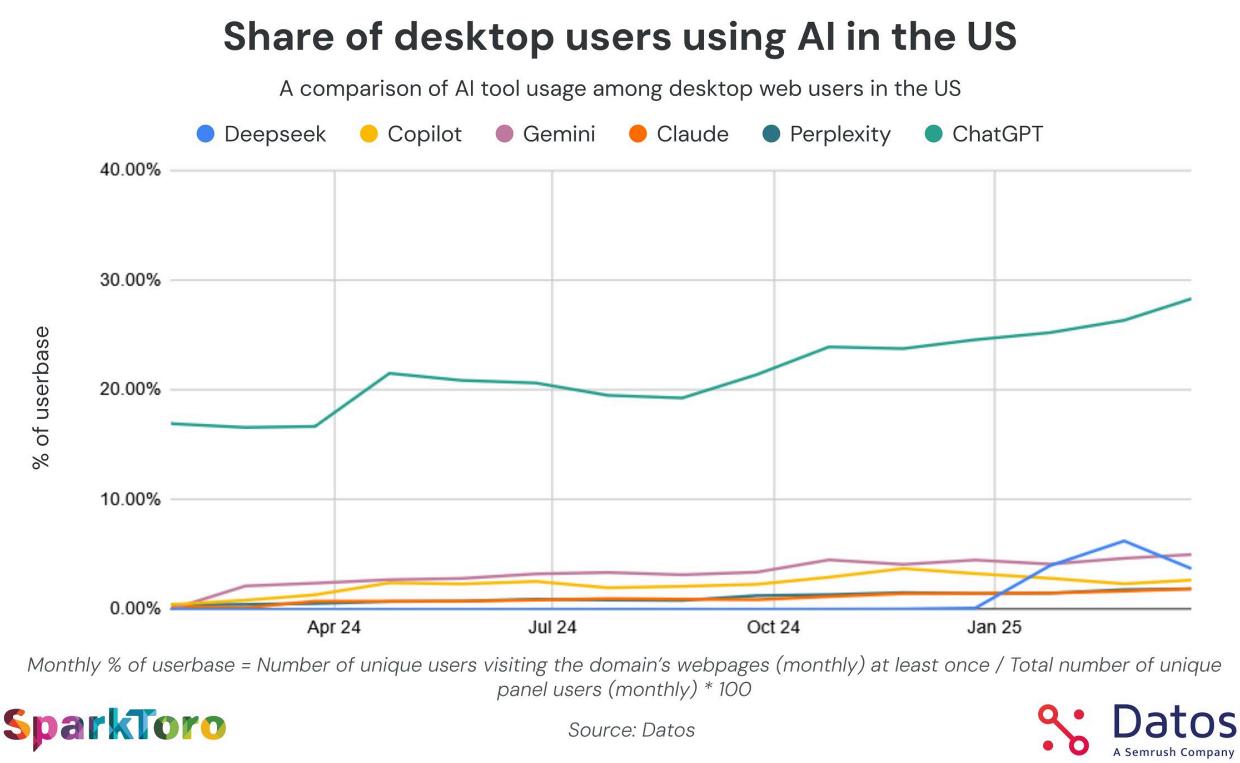
As for userbase, in the same time period in the US Google had a 90.15% share, while ChatGPT had 21.66%. In Europe it was 92.49% and 26.64%, respectively.

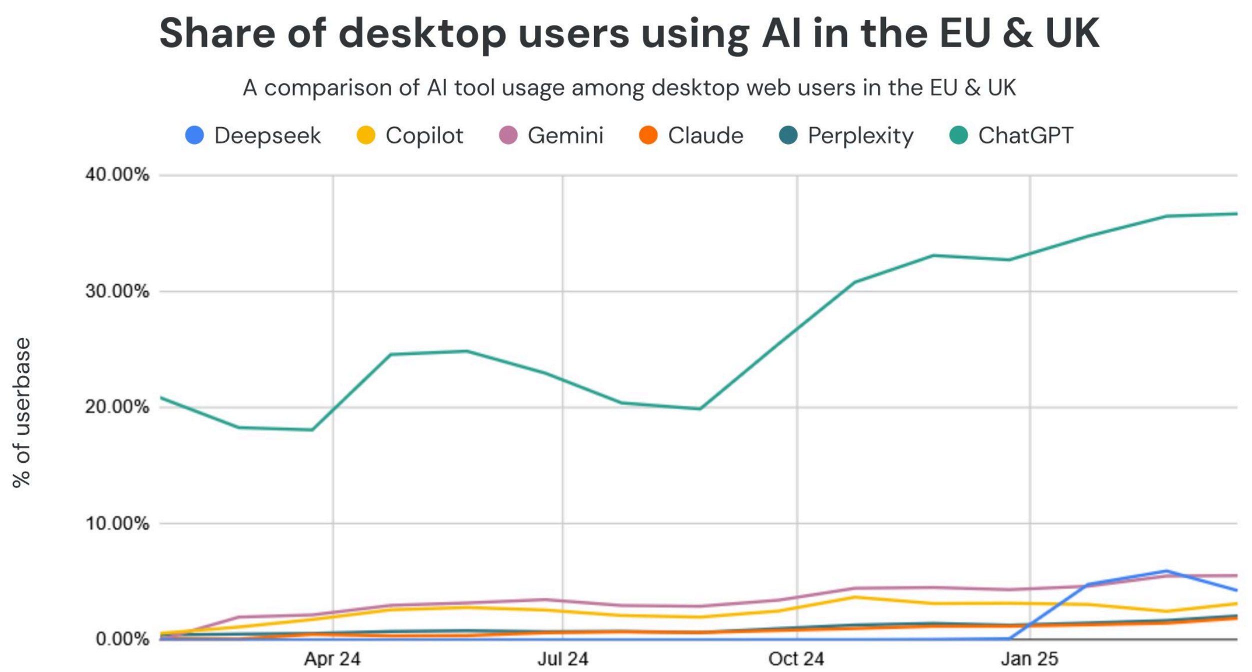
ChatGPT leads the way in AI: ChatGPT jumped into the top 5 in Q1 2025 for both the US and Europe for traffic from major traditional search. Copilot.microsoft.com also appeared for the first time in the top domains for both the US and Europe. This likely reflects the growing interest in AI, and in ChatGPT in particular.

Video is going strong: YouTube reached the top spot in the USA and remained at number 1 in Europe. This suggests that users in both regions are increasingly using traditional search to reach video content, potentially for both informational and entertainment purposes. It could also point to Google promoting their own services more actively.

State of AI search

Unsurprisingly for both the US and Europe, AI usage grew from Q1 2024 to Q1 2025, with ChatGPT being the most popular of the major AI platforms, though there were also key differences between the two regions.





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

Source: Datos

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

Overall Adoption

- Both regions saw steady growth in AI tool usage over the 15-month period
- The EU & UK outpaced the US in userbase percentage terms by the end of Q1 2025.

ChatGPT dominance

- ChatGPT is clearly the leading AI tool in both markets, commanding the largest share in every month.
- However, its dominance was slightly stronger in the EU & UK, where it consistently anchored ~30–35% of all users in later months.
- Growth in the US was more gradual, hovering closer to the 25–30% range.

Surging growth periods

Both markets showed notable inflection points: once in September to December 2024 with consistent month-over-month growth. Then in January 2025, when the Deepseek chatbot was released, Deepseek began gaining material share, especially in the EU & UK. However, it is still early days for this new player on the AI scene, and only time will reveal if their userbase stabilizes.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

One nugget I find fascinating is ChatGPT's (and the AI market as a whole's) rate of growth. It's no longer 100%+ YoY, and suggests that AI is following a very familiar adoption curve. In a March 2025 YouGov survey, 56% of Americans said they've knowingly used an AI tool, and a little less than half of those use them regularly (numbers that correspond reasonably well to the actual data observed via their devices). It wouldn't be surprising to find that, much like the adoption of the Internet, search engines, or social media, it's a long, slow, 10-15 years before we reach 80-90%+ of the population using them.

Top US AI destination domains Q1 2024 - Q1 2025

Top domains visited from US desktop AI tools

Q1 2024

Rank	Site name
1	google.com
2	microsoft.com
3	youtube.com
4	bing.com
5	facebook.com
6	canva.com
7	linkedin.com
8	github.com
9	chase.com
10	grammarly.com
11	consensus.app
12	amazon.com
13	twitter.com
14	instagram.com
15	nih.gov

Q1 2025

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

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Source: Datos

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Google still dominates

- Google.com remained in the top spot for AI search destinations.

YouTube and GitHub gain ground

- YouTube.com rose to the #2 spot, indicating increasing demand for video-based learning or content retrieval from AI-assisted queries.
- GitHub.com jumped from #9 to #3, suggesting growth in developer-oriented queries and code assistance use cases.

Newcomers make a mark

- Sora.com, OpenAI's text-to-video tool, appeared for the first time in 2025, going straight into the top 5, reflecting the massive growth in popularity of both AI and video.
- Researchgate.net also entered the top domains in Q1 2025, suggesting a growing demand for academic, research, and developer documentation through AI tools.

Decline of general tools and legacy platforms

- Microsoft.com, Facebook.com, and LinkedIn.com all declined in rank and share.

Top European AI destination domains Q1 2024 – Q1 2025

Top domains visited from EU & UK desktop AI tools

Q1 2024

Rank	Site name
1	google.com
2	microsoft.com
3	youtube.com
4	facebook.com
5	bing.com
6	canva.com
7	consensus.app
8	github.com
9	linkedin.com
10	instagram.com
11	whatsapp.com
12	nih.gov
13	twitter.com
14	veed.io
15	deepl.com

Q1 2025

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

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Source: Datos

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Google stays on top

- Like in the US, Google.com remained Europe's top AI search destination.

YouTube, Github and Sora climb the ranks

- YouTube.com jumped to the #2 spot, just like in the US.
- GitHub.com also rose from #9 to #4, suggesting a stronger developer segment turning to AI tools.
- Likewise, Sora.com, not present in 2024, appeared at #5.

The academic stack shrinks or shifts

In 2024, sites like ScienceDirect, ResearchGate, Semantic Scholar, Springer, and Wikipedia were prominent.

In 2025:

- Wikipedia held on at #9.
- ResearchGate remained at #12.
- ScienceDirect and Semantic Scholar disappeared entirely.
- Arxiv.org and Link.springer.com (Springer's redirector) entered, suggesting shifting tools or access methods.

Newcomers reflect creative and commercial usage

Whimsical.com, Amazon.com, Apple.com, Amazon AWS, and Onlinedoctranslator.com all made the 2025 list.

Key Takeaways for AI search

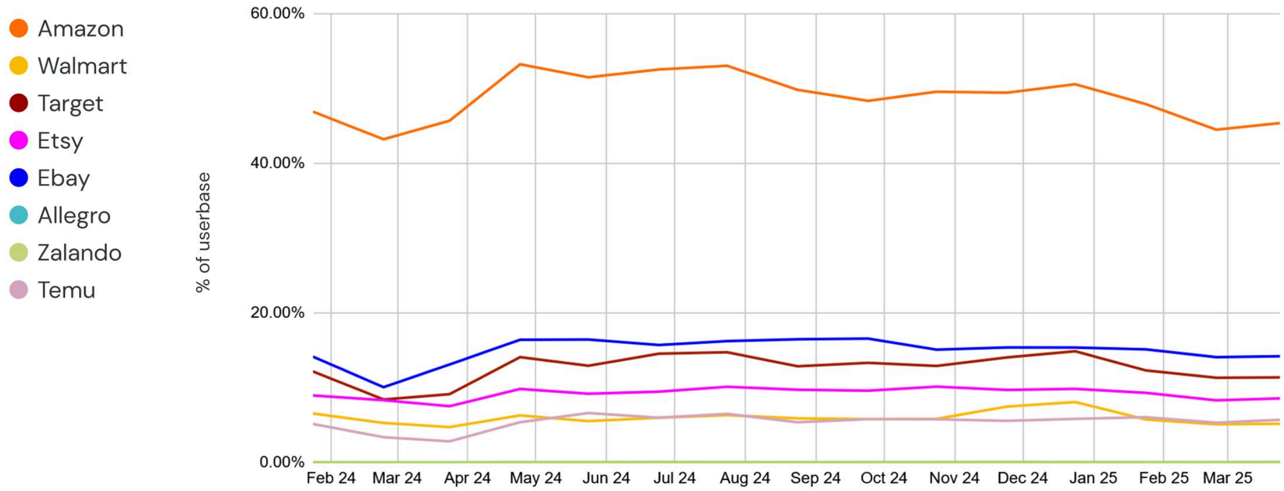
Google remains dominant, but is shrinking: Though still the top destination, Google.com lost significant share in both regions, as AI tools offer more direct answers or guide users to non-search-specific destinations.

Europe shows broader use cases; the US is more developer-focused: EU & UK users clicked through to academic, educational, and creative tools (e.g., ResearchGate, Springer, Whimsical), while US users were more heavily directed to developer platforms like GitHub and Sora.

Users are not just searching – they're completing tasks: Across both regions, traffic from AI tools increasingly points to platforms that help users act: video platforms (YouTube), coding resources (GitHub), productivity tools, and document repositories.

State of E-commerce

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



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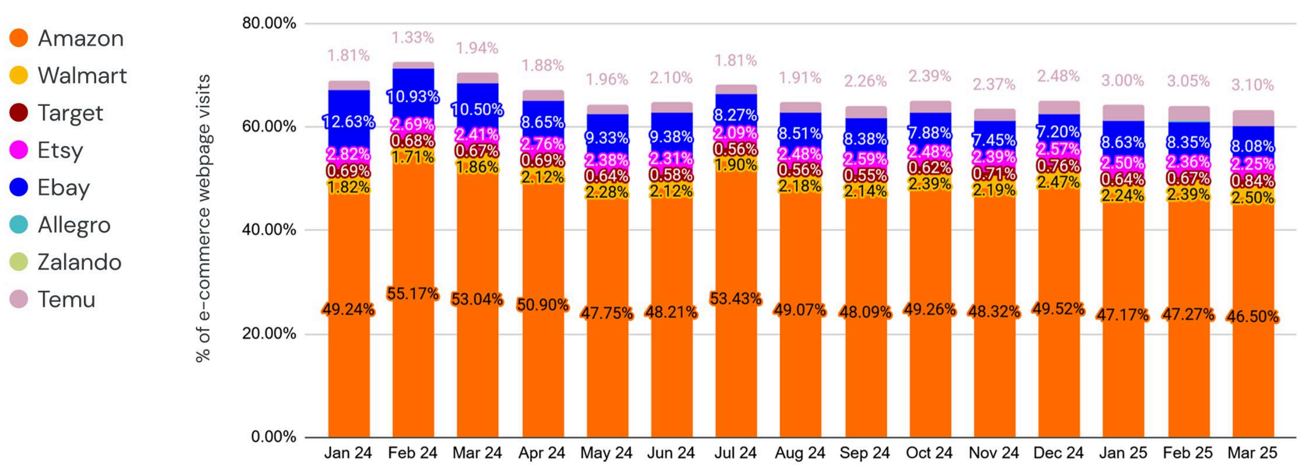
Source: Datos

Share of desktop e-commerce webpage visits in the US

Share of desktop visits across the major e-commerce platforms in the US



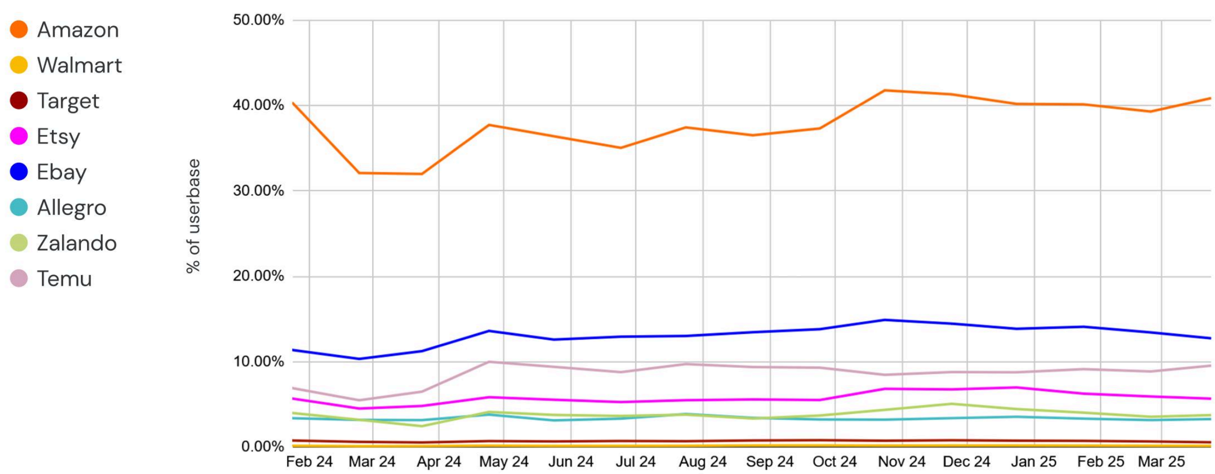
*% of e-commerce webpage visits = Number of webpage visits to a given retail domain / Total number of retail-related webpage visits in the panel * 100*

Source: Datos

In the US, Amazon remained the undisputed leader, consistently capturing over half of all desktop e-commerce webpage visits from Q1 2024 through Q1 2025. While there was mild fluctuation month to month, Amazon's dominance was both broad and stable, underscoring its entrenched role in American online shopping behavior.

Temu registered a small but growing presence, while non-US retailers like Zalando and Allegro were practically absent from the landscape, reflecting their European market orientation and underscoring the high concentration and domestic skew of the US e-commerce ecosystem.

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

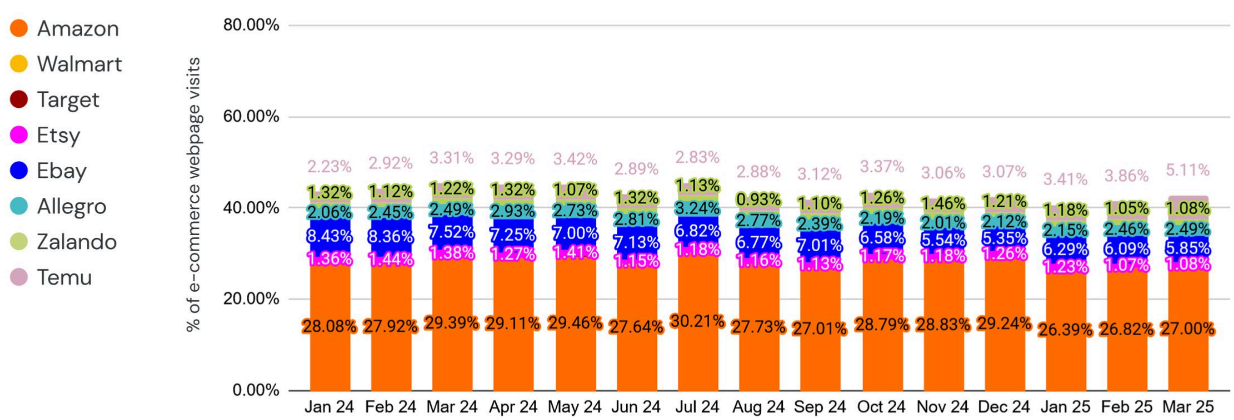


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100*

Source: Datos

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

Share of desktop visits across the major e-commerce platforms in the EU & UK



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

Source: Datos

In Europe, Amazon still led, but its share was noticeably lower over the 15-month period.

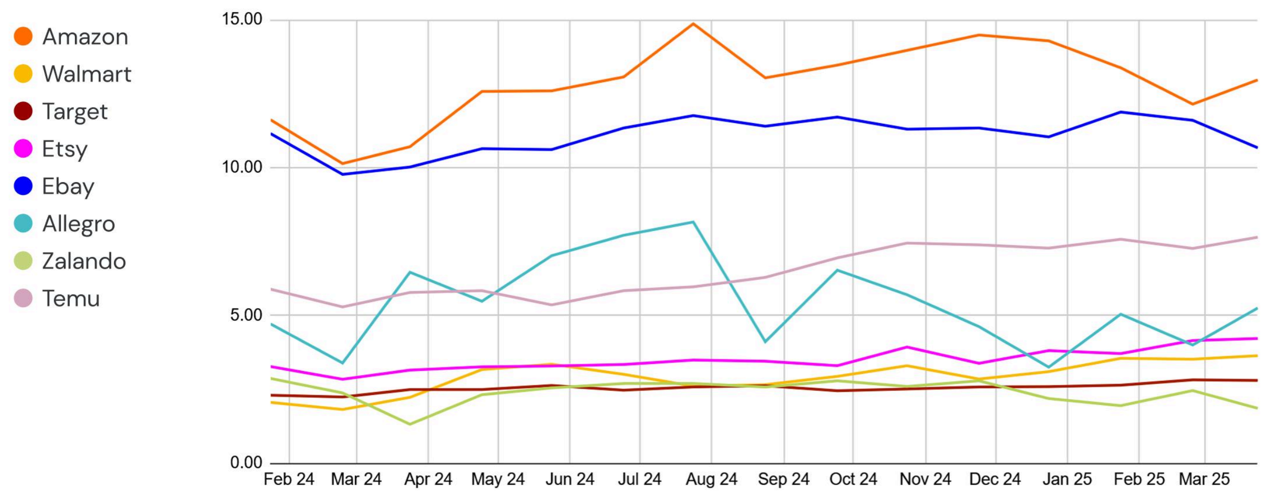
Here, the field is more diverse: Etsy, and Temu held consistent and growing positions while Ebay declined. Temu, in particular, showed clear upward momentum, expanding its share throughout 2024 and into 2025, hinting at rising brand adoption and increased European relevance.

Walmart and Target, major players in the US, remained negligible in the EU & UK, reflecting limited brand penetration outside North America.

Importantly, regional platforms like Zalando and Allegro maintained a stable presence across the chart. These local players are less visible globally but resonate strongly with domestic audiences, reflecting Europe's more fragmented e-commerce ecosystem.

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

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



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

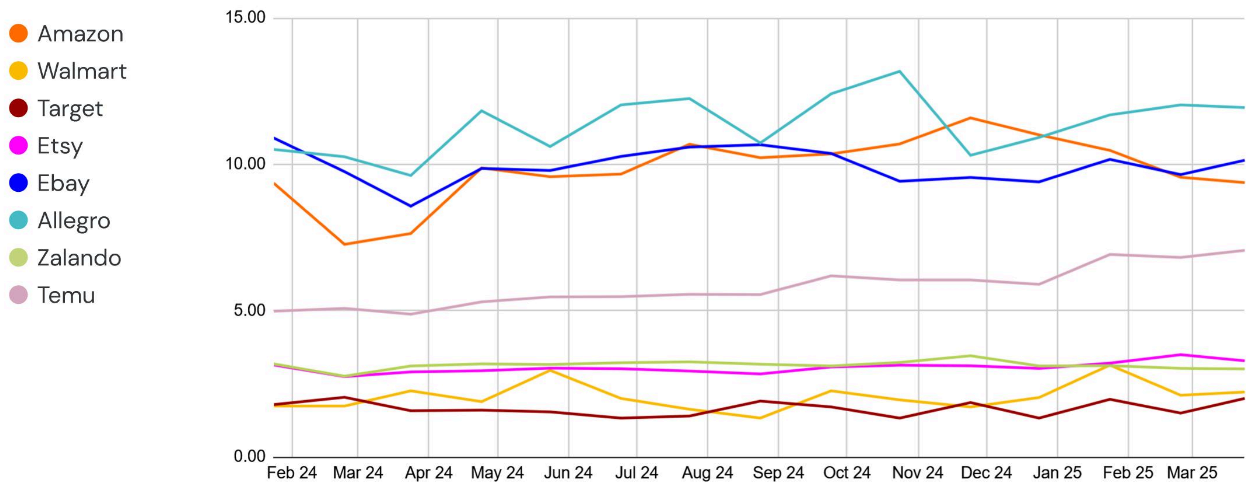
Source: Datos

As for searches on the top e-commerce sites, in the US:

- Amazon and Ebay led in search intensity, with consistently high searches per user, indicating deep browsing behavior.
- Temu's engagement rose steadily, suggesting growing user comfort and increasing reliance on its internal search.
- Walmart, Target, and Zalando remained low on searches per user, with flatter, lower-intensity usage patterns across the 15-month period.

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

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



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

SparkToro

Source: Datos

Datos
A Semrush Company

In Europe:

- Allegro led in engagement, with consistently high searches per user and multiple peaks throughout the year, outpacing Amazon and Ebay.
- Amazon and Ebay competed closely, with Amazon slightly overtaking Ebay in late 2024 but both hovering near 10 searches per user.
- Temu showed a steady upward trend, gaining ground in engagement, while Zalando, Walmart, and Target remain at the lower end of the spectrum.

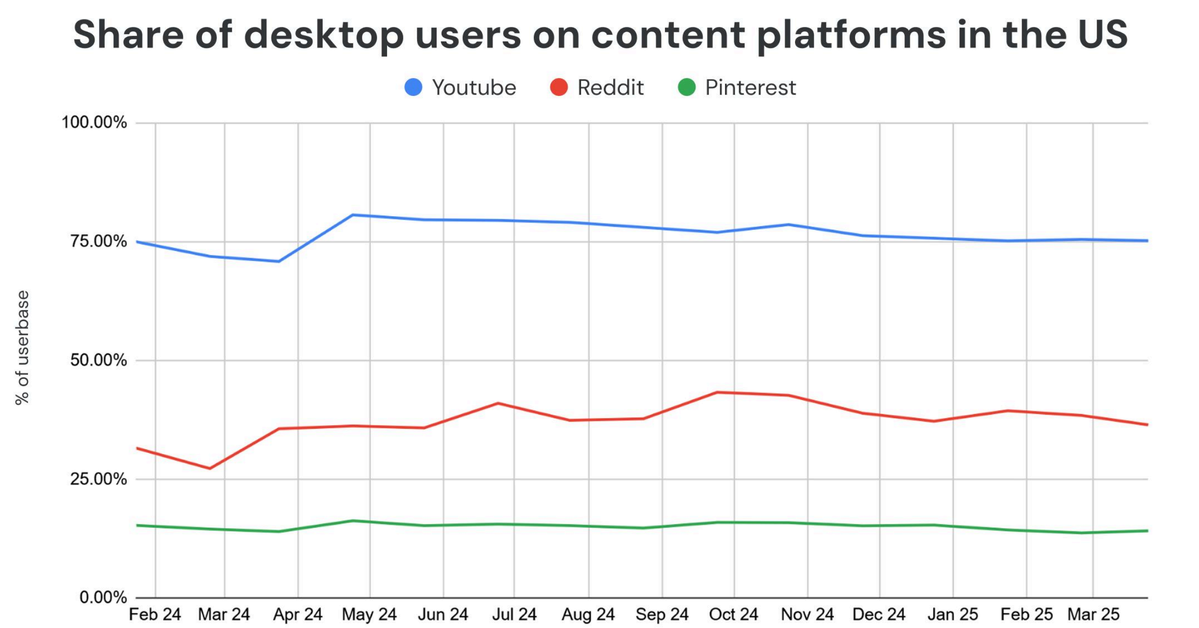
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

The e-commerce field's relative stability almost stands out in this report for its lack of large scale change. Temu's steady growth might be the outlier here, and speaks to the value of serving an underserved market (incredibly cheap products, marketed primarily via social and word of mouth).

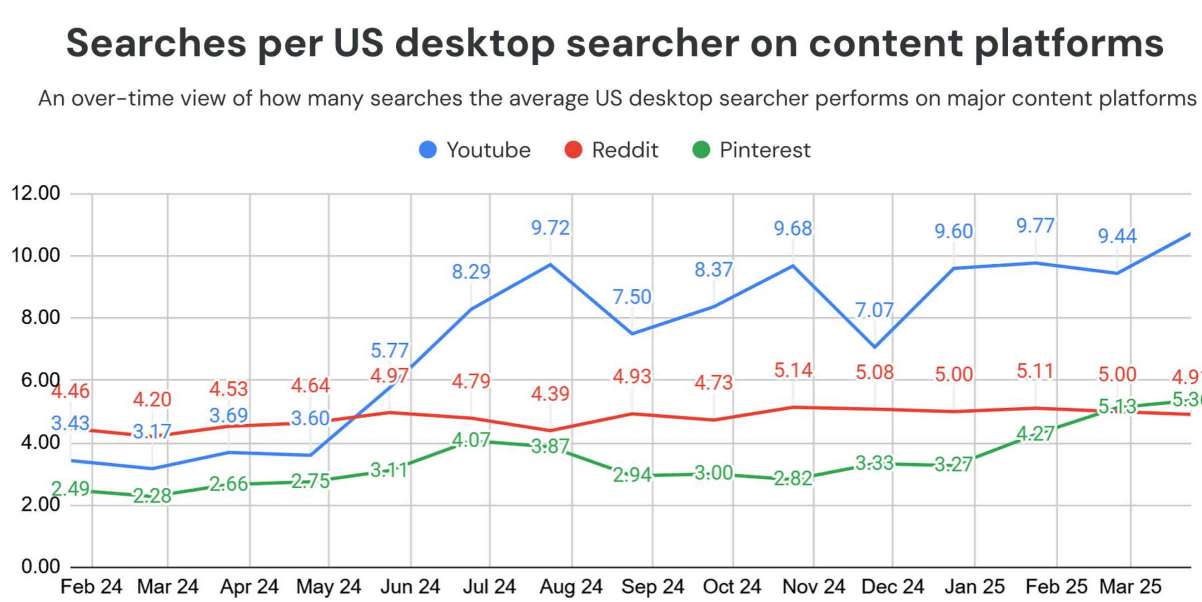
Content platforms search

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



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

Source: Datos



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

As the chart shows, in the US YouTube saw a steep growth in search activity share from May 2024. Starting below Reddit in early 2024, YouTube quickly overtook and climbed steadily to over 10 searches per searcher by March 2025. This reflects the overall trend we have seen of video content becoming more and more prominent.

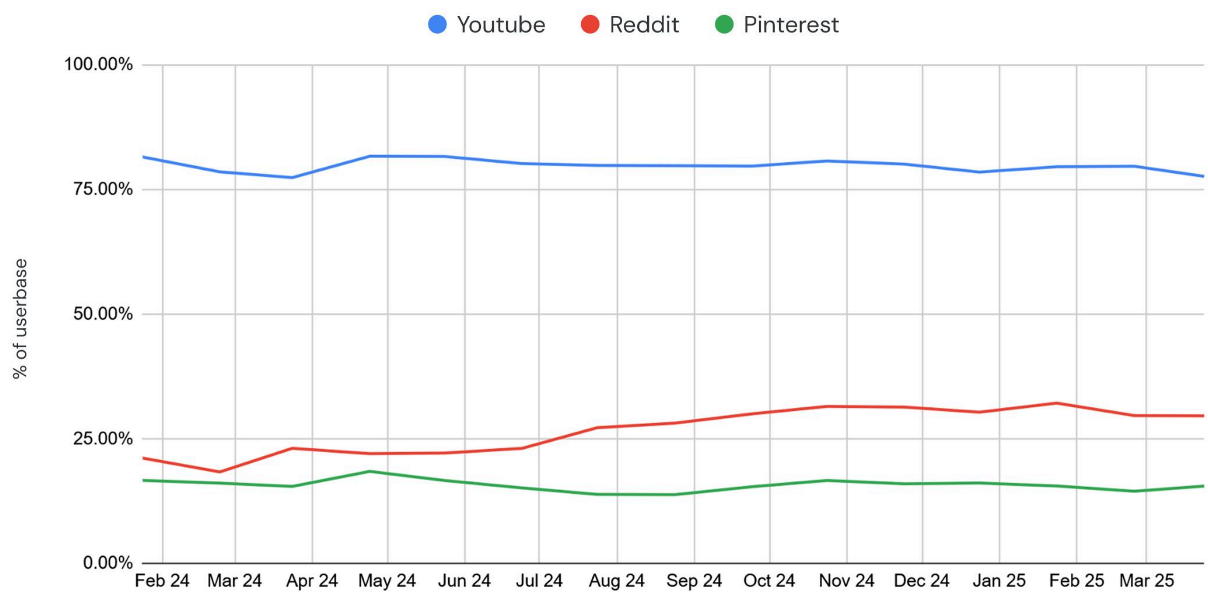
Meanwhile Reddit's average search activity held steady but stagnant, while Pinterest slowly gained momentum over the 15 month period.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

Fascinating! This graph tells a story the press should be yelling about, but no one seems to hear over the roar of AI hype. If your brand is seeking opportunity for reach and engagement, and a way to influence both people and the AI models (all of which train on these three platforms' data), YouTube, Reddit, and Pinterest should be atop your list.

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

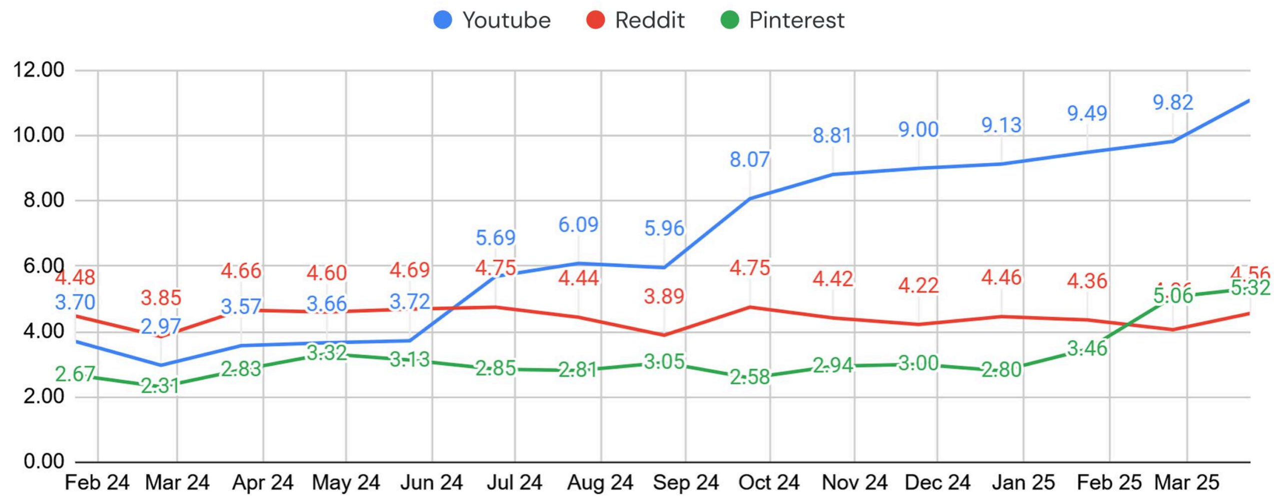


*Monthly % of userbase = Number of unique users visiting the domain's webpages (monthly) at least once / Total number of unique panel users (monthly) * 100*

Source: Datos

Searches per EU & UK desktop searcher on content platforms

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

In Europe, a very similar trend can be observed for all three content platforms, with YouTube seeing a surge in search activity from May onward, and steady growth from there. Reddit and Pinterest both showed similar search patterns as in the US.

Conclusion

Search is no longer confined to a single engine or experience. From AI interfaces to e-commerce and various content platforms, users are increasingly searching across ecosystems, not just Google. The data from Q1 2024 to Q1 2025 reveals a search landscape in motion, shaped by new tools, shifting user habits, and regional nuances.

Key Takeaways

Google is still on top – for now

Traditional search engines continue to receive the majority of search activity, but Google's share is shrinking slightly in both the US and Europe as other tools gain traction.

AI search is now mainstream

ChatGPT became a top 5 search destination in both regions. Newcomers like Deepseek and Sora are gaining share, and traffic from AI tools increasingly points to task-based destinations like GitHub, ResearchGate, and YouTube.

YouTube is the breakout search platform

Across traditional and AI search, as well as direct platform use, YouTube saw the most significant growth in search volume per user, especially in Europe.

Search intent is diversifying

Informational and navigational searches still prevail, but the rise of AI overviews and direct-to-platform behaviors may prompt a shift toward faster, more embedded discovery.

E-commerce search differs sharply by region

In the US, Amazon remains the top player. In Europe, engagement is more distributed, with regional platforms like Allegro and Zalando maintaining a strong presence and Temu showing growth in both markets.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

I love data that challenges commonly-held assumptions, especially during the heights of hype cycles. Is AI big and growing? Yes. Is it challenging the dominance of Google or costing them users, revenue, or searches? No. Should the press be covering the rise of search on Reddit, Pinterest, and YouTube with some of the same fervor they show for ChatGPT, Claude, and Perplexity? Absolutely.

And one final note: bringing data to an opinion battle is a superpower. This report won't just arm you for that battle once; the team at Datos is working with me quarterly for the foreseeable future to put these invaluable numbers in your hands. I hope you find it as valuable and perspective-broadening as I do. Huge thanks to everyone at Datos for giving me (and now, all of you) access to their powerful panel and wonderful team.

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

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