

State of Search Q1 2026

Behaviors, Trends, and Clicks
Across the US & Europe





Introduction

With rapid AI breakthroughs and constant speculation about the future of search, the demand for reliable, real-world data has never been greater.

This report draws on large-scale clickstream data from the US, EU, and UK in Q1 2026 to provide a grounded view of how people search, browse, and engage online. Alongside core metrics, it includes deeper analysis of Google AI Mode and shifts in query length, offering additional context on how users are interacting with both traditional and AI-assisted search.

Together, these insights highlight where meaningful change is occurring, and where behavior remains more consistent than expected.

At Datas, 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 Datas' 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 March 2025 to March 2026.

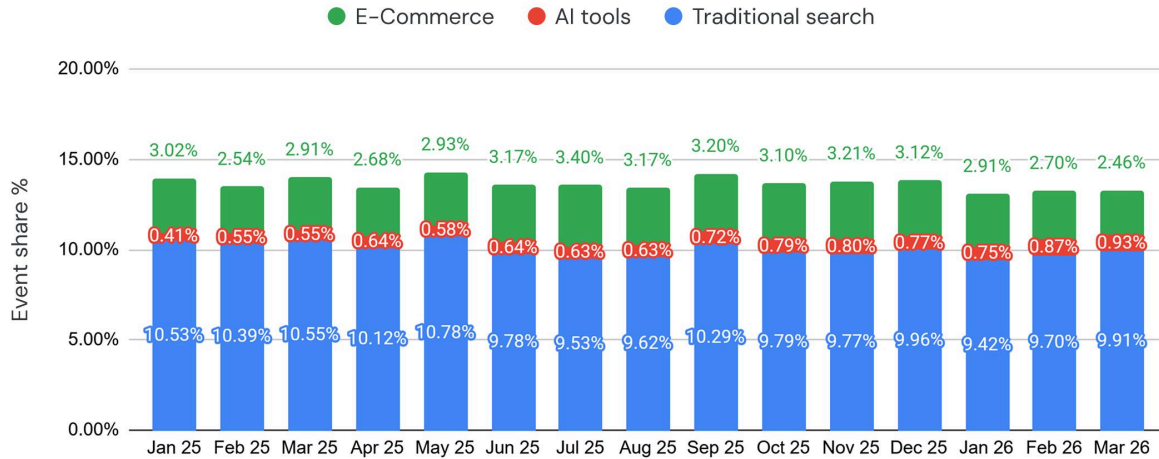
It includes:

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



Traditional search, AI, and e-commerce

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



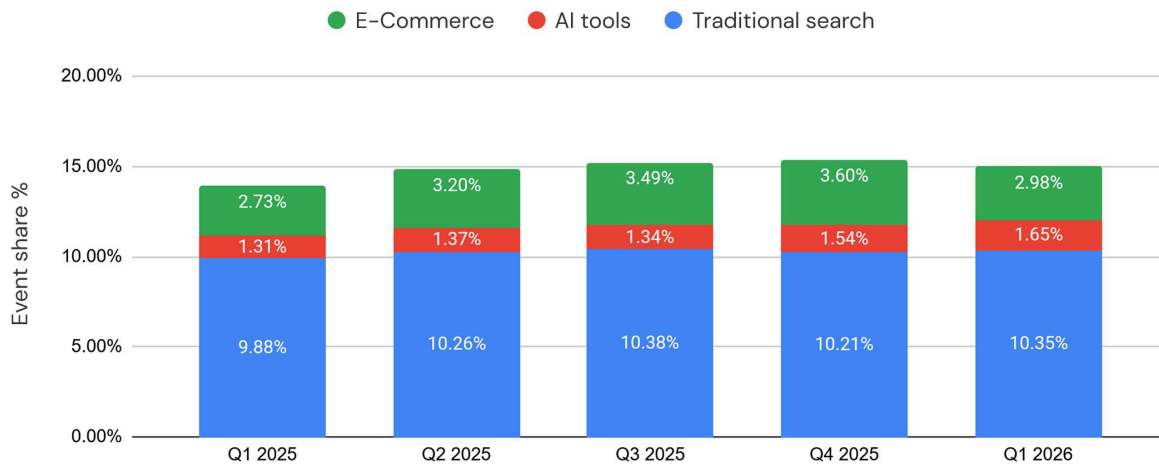
Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%

SparkToro

Source: Datas

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



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

SparkToro

Source: Datas

Datos
A Semrush Company

Note on quarterly values:

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

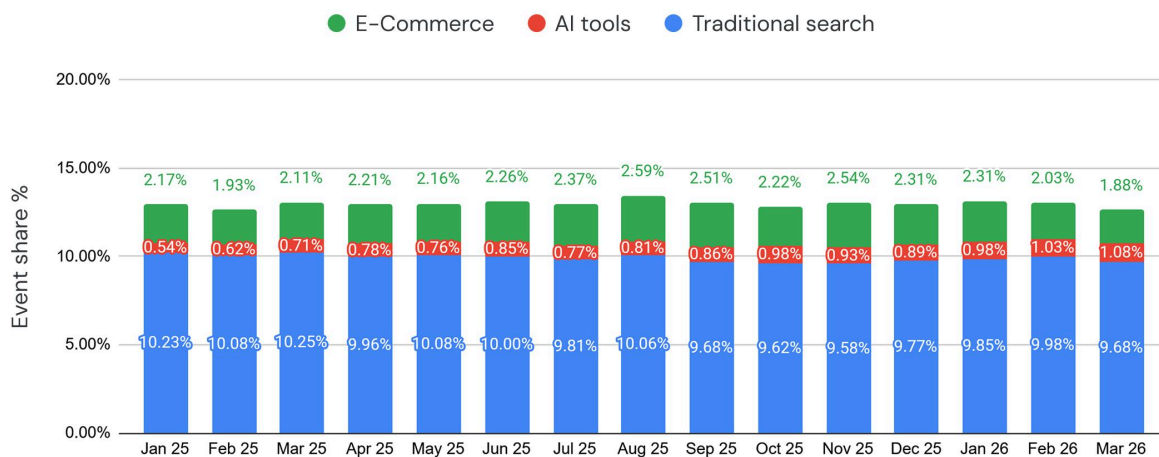


In the US, traditional search remained the largest driver of desktop search activity. However, its trajectory was broadly flat to slightly declining. Movement across quarters was minimal, with values staying within a narrow range from Q1 2025 through Q1 2026.

AI tools continued their upward trajectory, showing both consistent and accelerating growth over time. Their share of desktop events increased from approximately 0.41% in January 2025 to 0.93% by March 2026. Notably, the pace of growth strengthened following Q4 2025, suggesting that adoption is persisting beyond seasonal effects. Their share of desktop events increased from 1.31% in Q1 2025 to 1.65% by Q1 2026.

E-commerce activity followed a more seasonal pattern with event share rising from 2.73% in Q1 2025 to a peak of 3.60% in Q4, before declining to 2.98% in Q1 2026. This drop suggests that the Q4 increase was driven largely by seasonal demand.

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



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

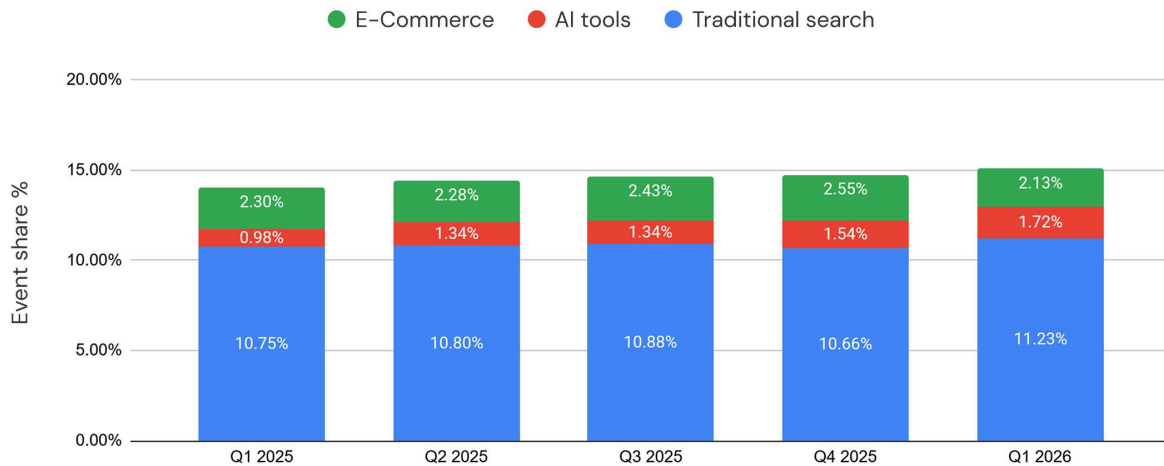


Source: Datos





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



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



Source: Datos



In the EU and UK, traditional search remained broadly stable throughout the period, with slight downward pressure visible in the monthly data, followed by a modest rebound at the quarterly level in Q1 2026, rising to just above 11%.

AI tools showed the strongest and most consistent growth across both views. Monthly data indicates a near doubling in share from 0.54% in Jan 2025 to 1.08% by March 2026, while quarterly figures confirm continued acceleration, reaching a new high in Q1 2026. This sustained upward trend points to ongoing adoption rather than plateauing.

E-commerce activity followed a more cyclical pattern. After peaking mid-year and again in Q4 2025, both monthly and quarterly data show a clear decline into early 2026, pointing to a seasonal uplift followed by a return to lower baseline levels.

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

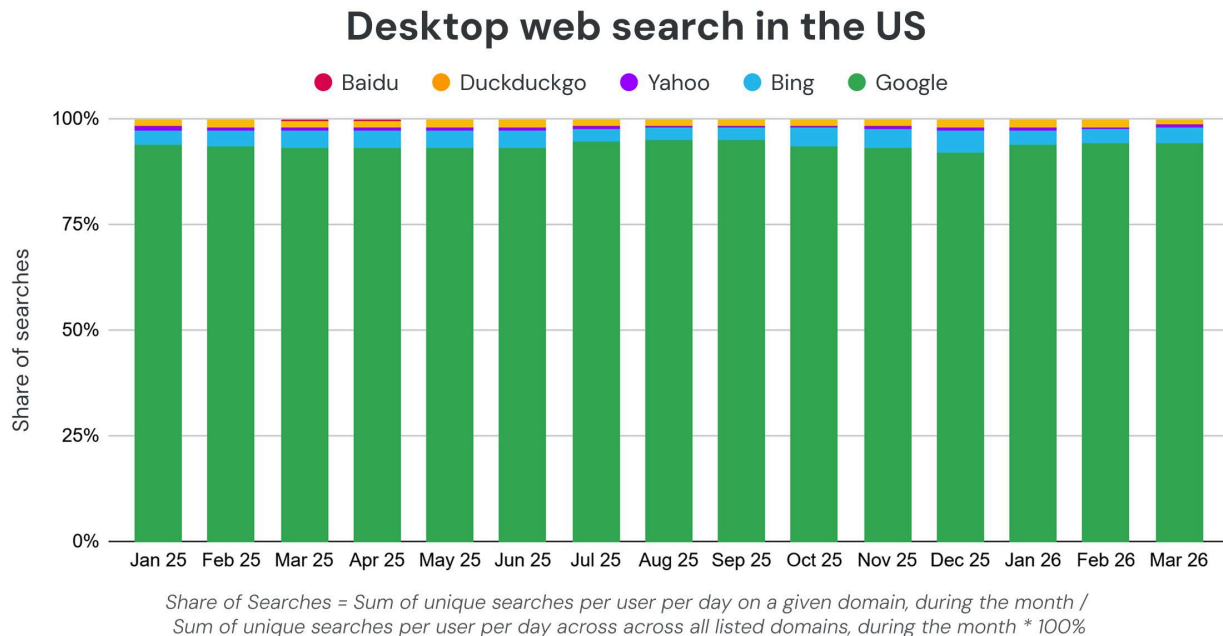


After some stagnation in both the US and EU/UK in 2025, it's interesting to see AI tools continue to grow their share for the last two quarters in both regions. This suggests we haven't yet reached the peak of AI usage. What's shocking is that we're still at <2% of visits going to AI tools, despite the relentless hype, media attention, and cultural discussion. AI has a long way to go before usage catches up to expectations.



State of traditional search

A review of the performance of the five largest "traditional" (non-AI) search engines, tracking their progress from Q1 2025 through Q1 2026.



SparkToro

Source: Datos

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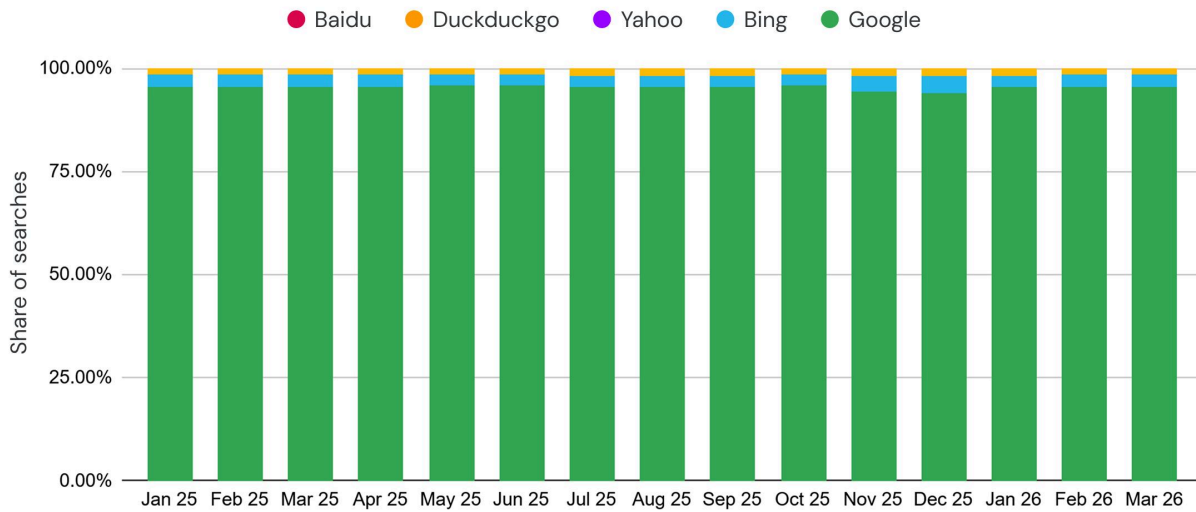
In the US, Google maintained a dominant share of desktop search, with some variability. Its share declined to a low of 92.1% in December 2025 before recovering to 94.3% by March 2026.

Bing exhibited more pronounced fluctuation, peaking at 5.33% in December 2025 before falling back to 3.2–3.8% in early 2026. This pattern points to a short-term Q4 spike rather than continued growth.

Alternative engines remained marginal. DuckDuckGo peaked at 1.93% in January 2026 before dropping to 1.21% by March, while Yahoo continued declining.



Desktop web search in the EU & UK



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

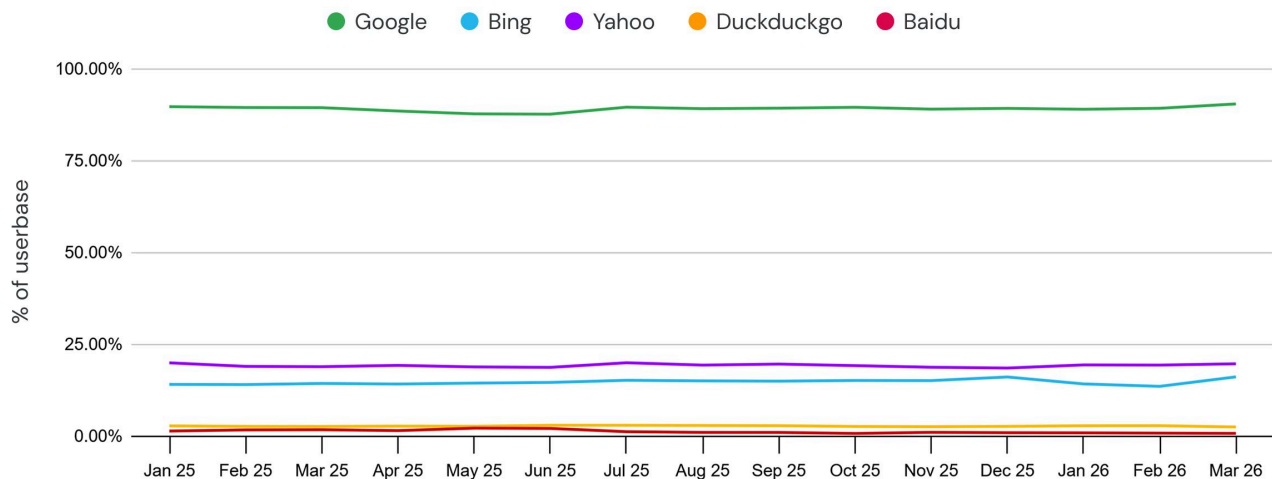
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In the EU and UK, Google retained a dominant share of desktop search, though with a noticeable dip in Q4 2025. Its share declined from 96.0% in October to 93.9% in December, before recovering to 95.5% in early 2026.

Bing followed a similar pattern, with gains concentrated in Q4. Its share rose to a peak of 4.12% in December 2025 before falling back to 2.5–3.0% in early 2026.

Other search engines remained marginal. DuckDuckGo peaked at 1.83% in December before declining, while Yahoo and Baidu maintained consistently minimal shares, with only limited month-to-month variation.

Share of desktop web search users in the US



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

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Source: Datos

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