

State of Search Q2 2026

Behaviors, Trends, and Clicks
Across the US & Europe





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Introduction

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

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

At Datos, we process billions of anonymized desktop digital events daily across regions, platforms, and devices. This report is built on that data. Our mission is to equip businesses with real-world, privacy-secured insights into how people search, browse, and engage online, so they can make smarter, faster decisions across content strategy, SEO, product planning, and beyond.

Our State of Search report is published quarterly; [subscribe](#) to our updates to get early access to it, and our other reports.

Executive summary

This report draws on user behavior clickstream data collected from Datos' large-scale panel of tens of millions of active desktop users globally. For the purpose of this study, we have analyzed behavior in the USA and Europe (EU and UK) from April 2025 to June 2026.

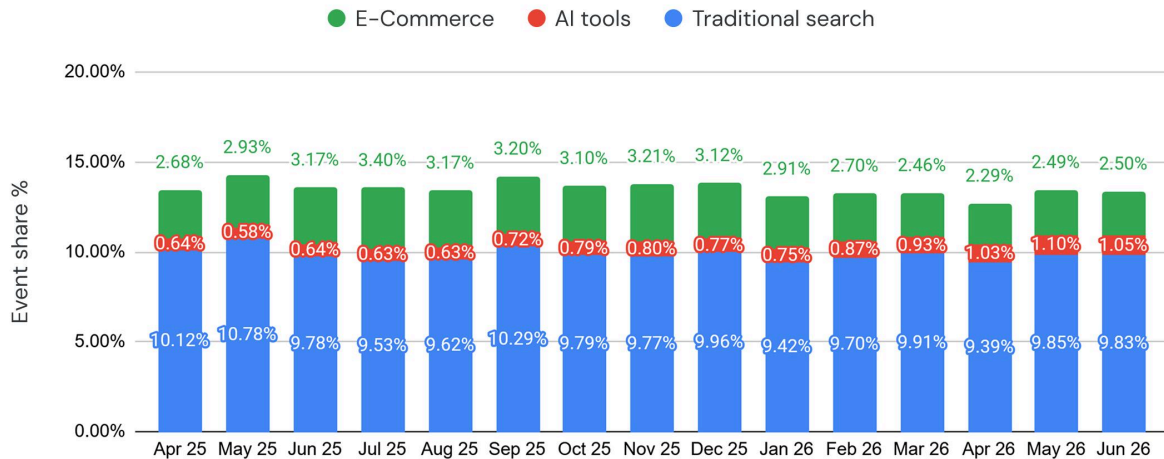
It includes:

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



Traditional search, AI, and e-commerce

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



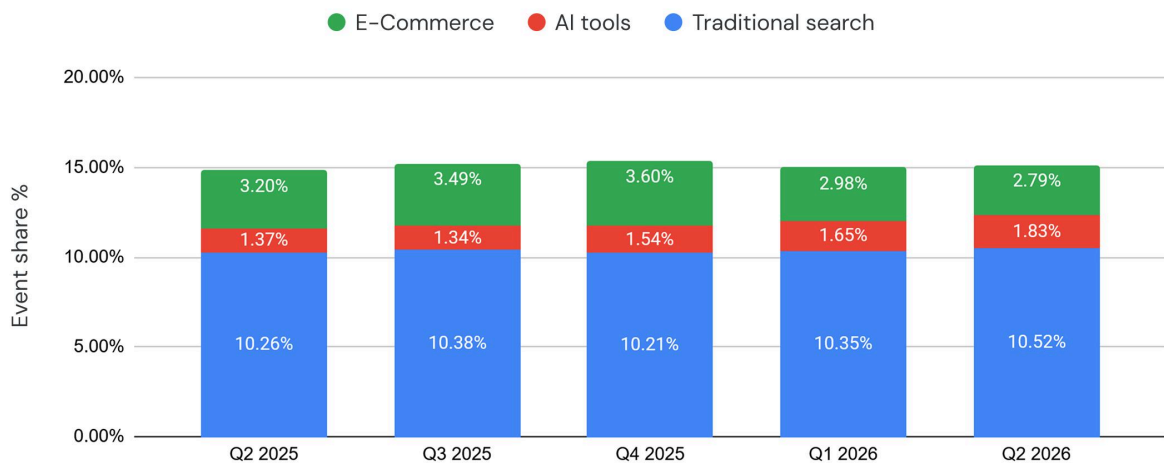
Monthly Events Share (%) = Monthly visits to domain's webpages / Total monthly webpage visits across entire panel * 100%

SparkToro

Source: Datos

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

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

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

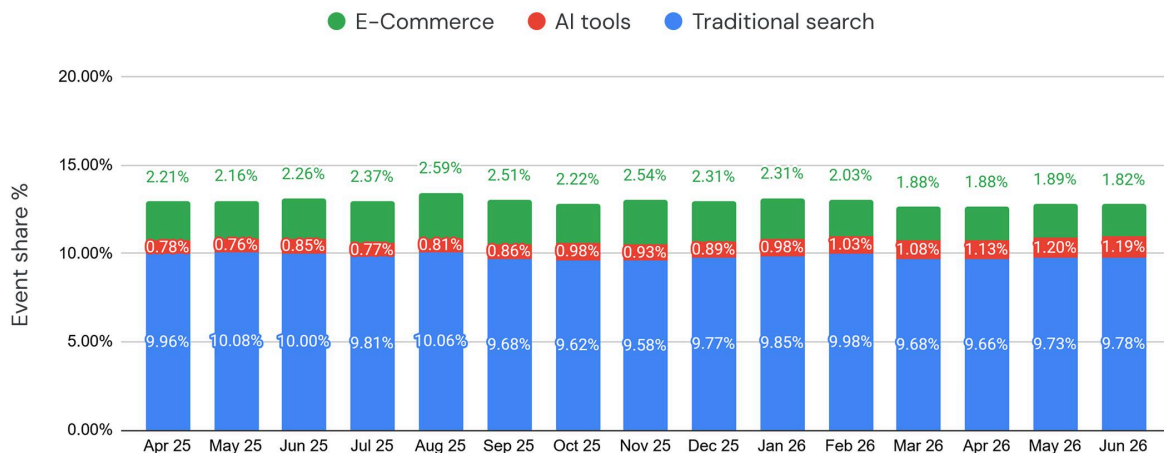
Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO



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

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



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

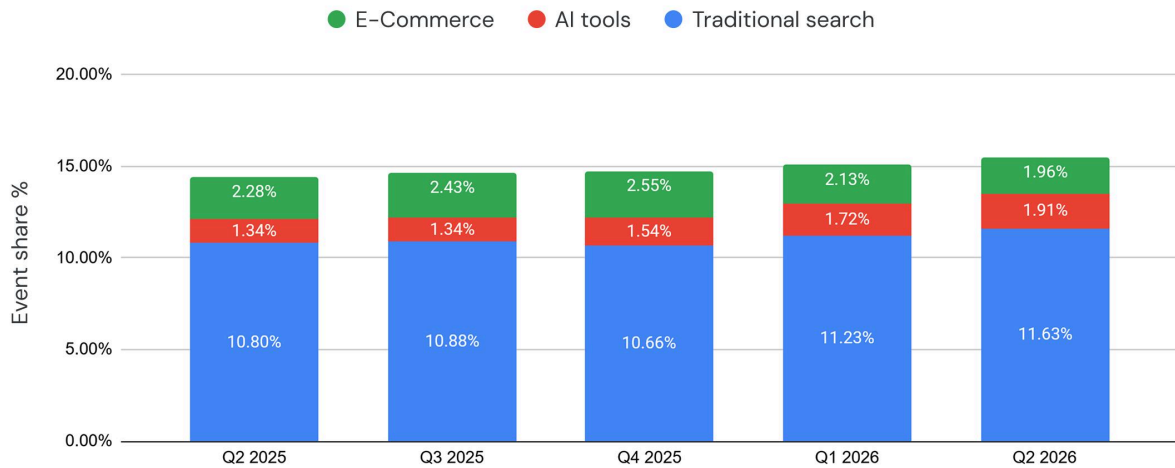


Source: Datas





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



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



Source: Datos



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

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

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

Rand's Take

Rand Fishkin
SparkToro Co-founder & CEO

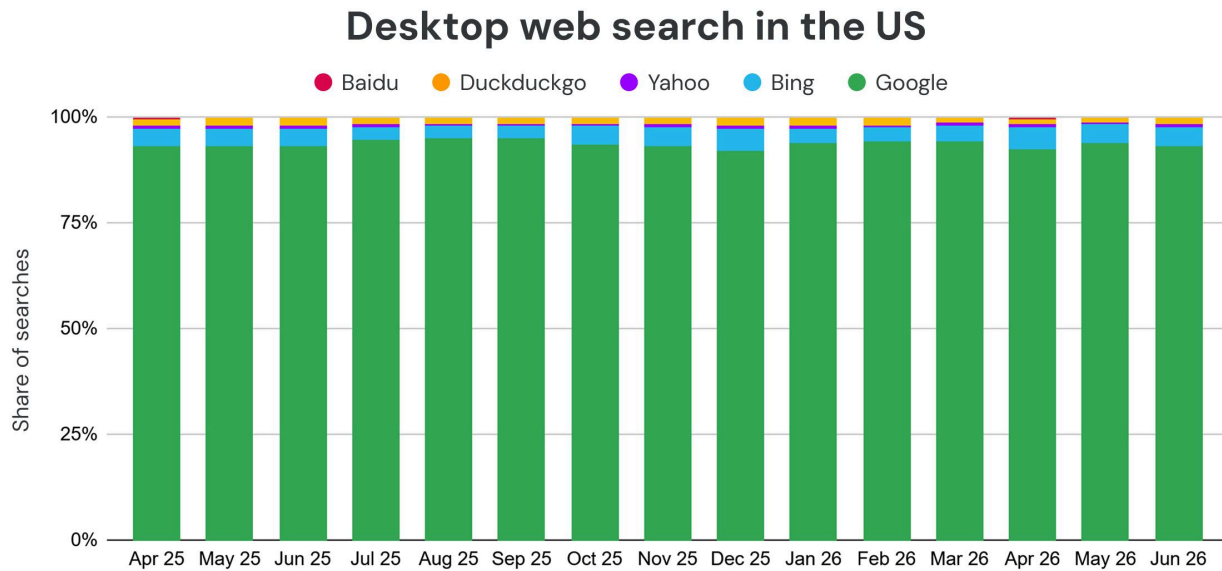


I mentioned the negative sentiment AI faces in the United States – according to surveys, that's even more pronounced in the EU, and there's more legislative action being taken to restrict, fine, and control AI use. Despite that, Europeans are adopting AI at higher rates, as they have been the last few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



State of traditional search

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



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



Source: Datos



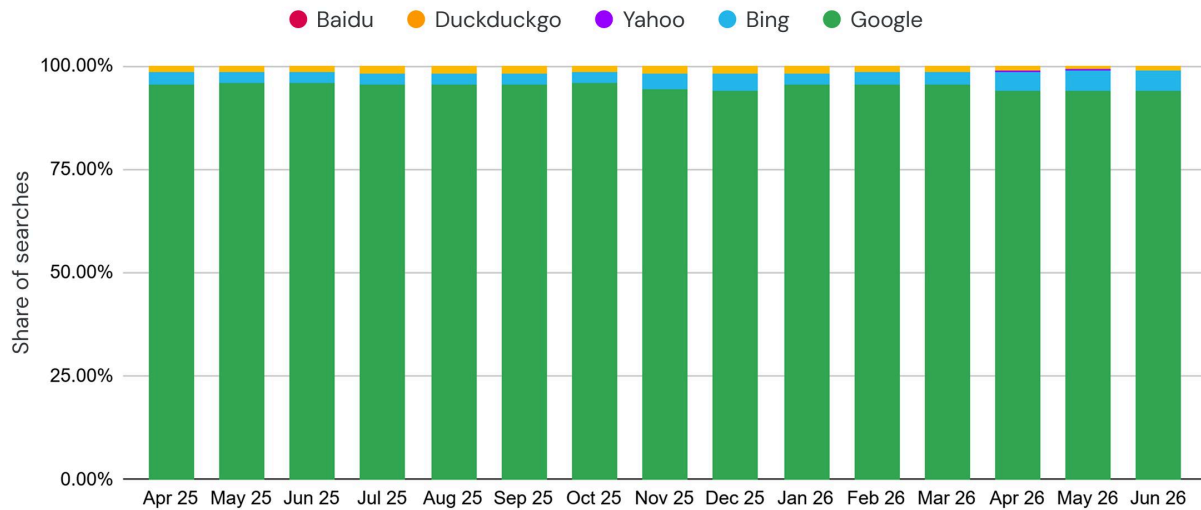
Google continues to dominate desktop search, maintaining a market share between 92.4% and 94.0% throughout the quarter.

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

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



Desktop web search in the EU & UK



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

SparkToro

Source: Datos

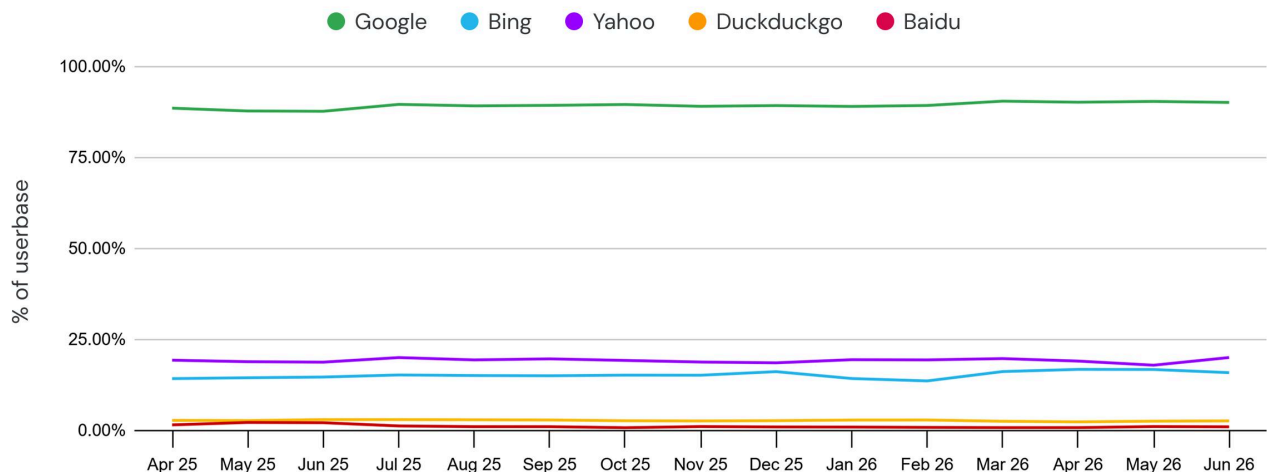
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In the EU/UK, patterns broadly reflect those in the US. Google maintains an overwhelming lead in desktop search, holding a market of at least 94.0% throughout Q2. While still dominant, its share remains slightly below the 95–96% levels seen for much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

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

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

Share of desktop web search users in the US



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

SparkToro

Source: Datos

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