

2026 Generative AI Landscape: **The Evolution of AI Search**



2026 Gen AI Landscape at a glance

Gen AI
Avg. Monthly Web Visits

9.5
Billion

Worldwide,
Desktop & Mobile Web,
Jun 2025 – May 2026

+70% vs previous year

Gen AI
App Downloads

4.4
Billion

Worldwide,
iOS & Android,
Jun 2025 – May 2026

+58% vs previous year

Gen AI Users
Age 18–34

50%
of Gen AI Users

Worldwide,
Desktop & Mobile Web,
May 2026

vs 61% in May 2024

ChatGPT–Google
Overlap

95%
of ChatGPT Users

Worldwide,
Desktop & Mobile Web,
Mar 2026 – May 2026

vs 95% in Sep 2025

ChatGPT Ad
Penetration

26%
of ChatGPT Chats

US,
Desktop,
June 2026

vs 14% in May 2026

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2026 GEN AI LANDSCAPE

AI Search has rapidly evolved from a collection of standalone AI assistants into one of the internet's fastest-growing discovery channels. Millions of people now use platforms such as ChatGPT, Gemini, Claude, Perplexity and AI Mode to research products, compare brands, solve problems and make purchasing decisions. Rather than replacing traditional search, these experiences are creating a new layer of discovery that increasingly influences how consumers navigate the web.

At the same time, AI Search is expanding well beyond dedicated chatbots. Google is embedding AI directly into Search through AI Overviews and AI Mode, Amazon is integrating Alexa for Shopping (formerly Rufus) into ecommerce, and Meta is bringing AI-powered discovery to Instagram, Facebook, WhatsApp and Messenger. AI assistants are also becoming increasingly embedded into browsers, productivity software and enterprise applications. As AI becomes woven into the products people already use every day, search is becoming less about where users go and more about how information finds them.

This evolution is creating entirely new competitive dynamics. Businesses are now competing not only for rankings in traditional search engines, but also for visibility inside AI-generated answers, recommendations and conversations. Citations, referral traffic, conversational advertising and AI brand visibility are emerging as new metrics of digital success, requiring marketers to rethink how they measure performance and influence customer journeys.

This report explores the next stage in the evolution of AI Search. Using Similarweb's digital intelligence, it examines how the leading AI platforms are growing, how user behaviour is changing, where referral traffic is flowing, how brands are earning visibility, and how advertising is beginning to reshape AI experiences. Together, these insights provide a comprehensive view of the emerging AI Search ecosystem and the trends that will define digital discovery in the years ahead.

01

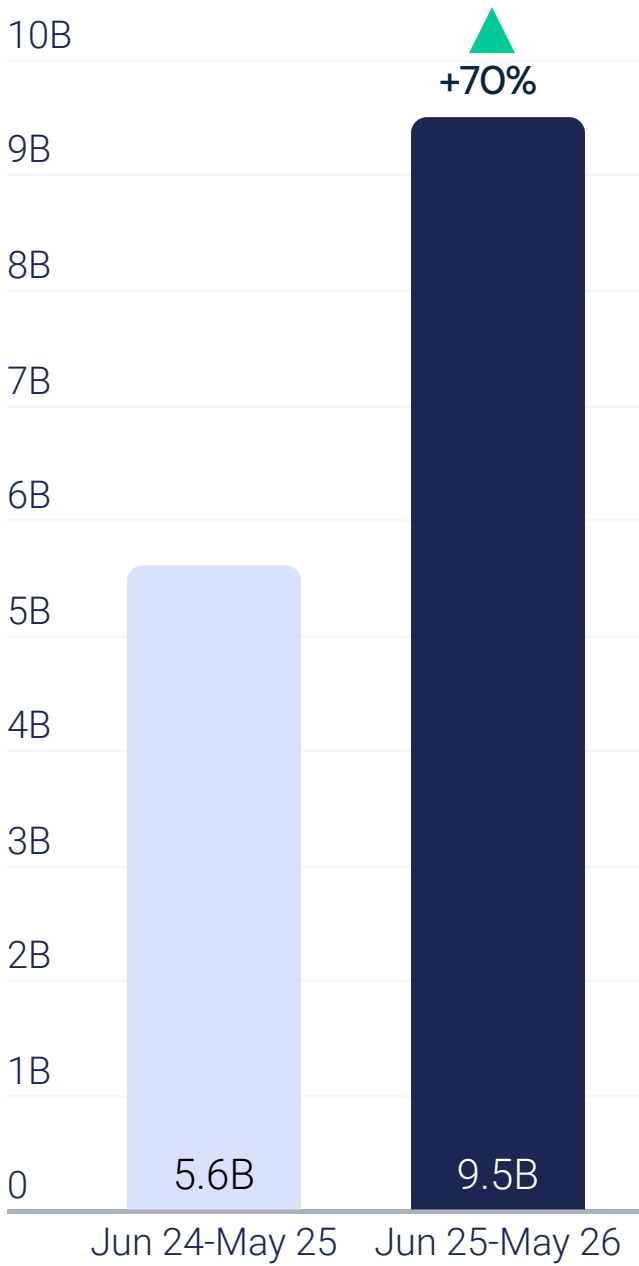
THE EVOLUTION OF GEN AI PLATFORMS

Generative AI has become one of the web's fastest-growing ecosystems

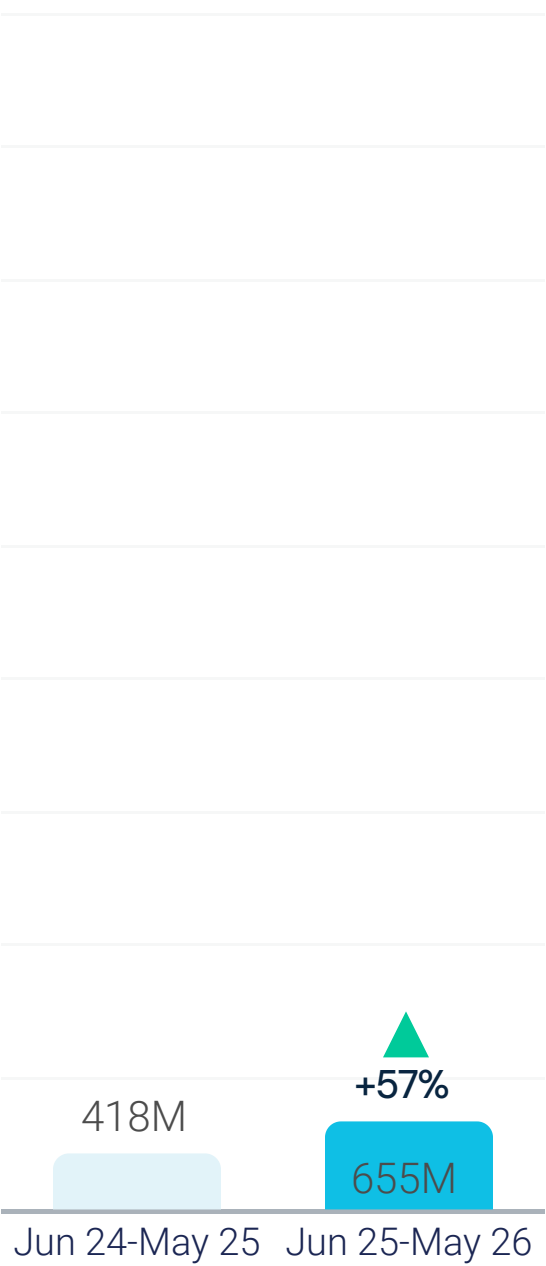
Generative AI has entered a new phase of mainstream adoption, with sustained growth across web and mobile. Average monthly web visits reached 9.5 billion between June 2025 and May 2026, up 70% year over year, while monthly unique visitors climbed 57% to 655 million. Mobile engagement is accelerating even faster, with app downloads up 58% to 4.4 billion over the same period.

This growth reflects a fundamental shift in consumer behaviour. What began as an emerging technology is rapidly becoming part of everyday digital life, with users returning more frequently and engaging with AI across a growing range of devices, tasks and use cases. Generative AI is no longer a niche category, it is establishing itself as a core layer of the modern internet.

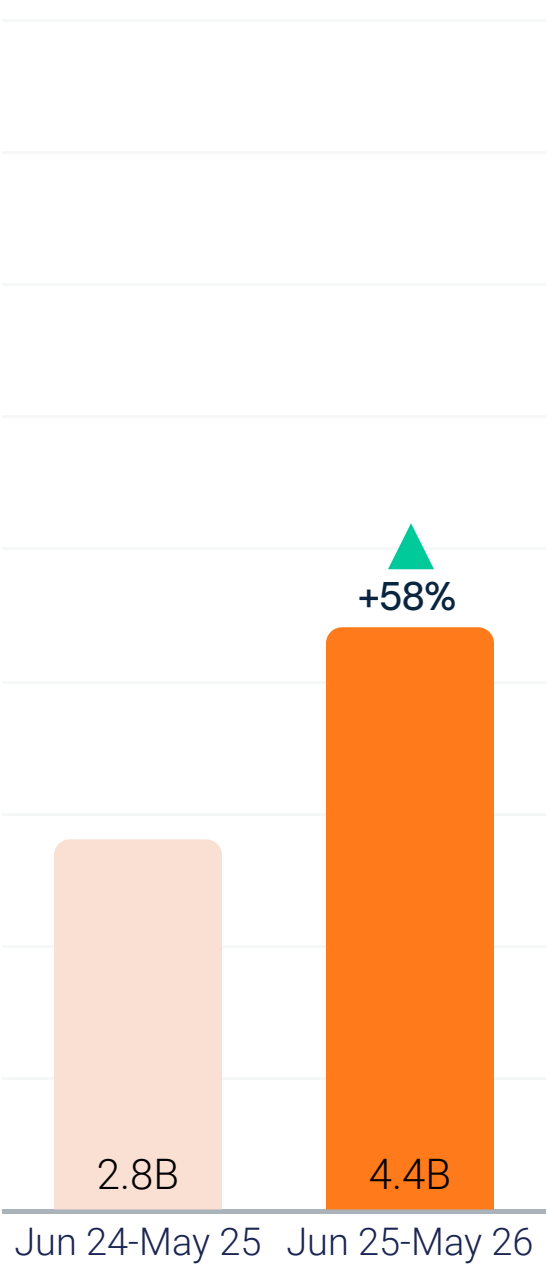
Gen AI Platforms – Avg Monthly Site Visits, Avg Monthly Unique Visitors and App Downloads
Worldwide, Web & App, Jun 2024 – May 2026



Web Visits



Web UVs



App Downloads

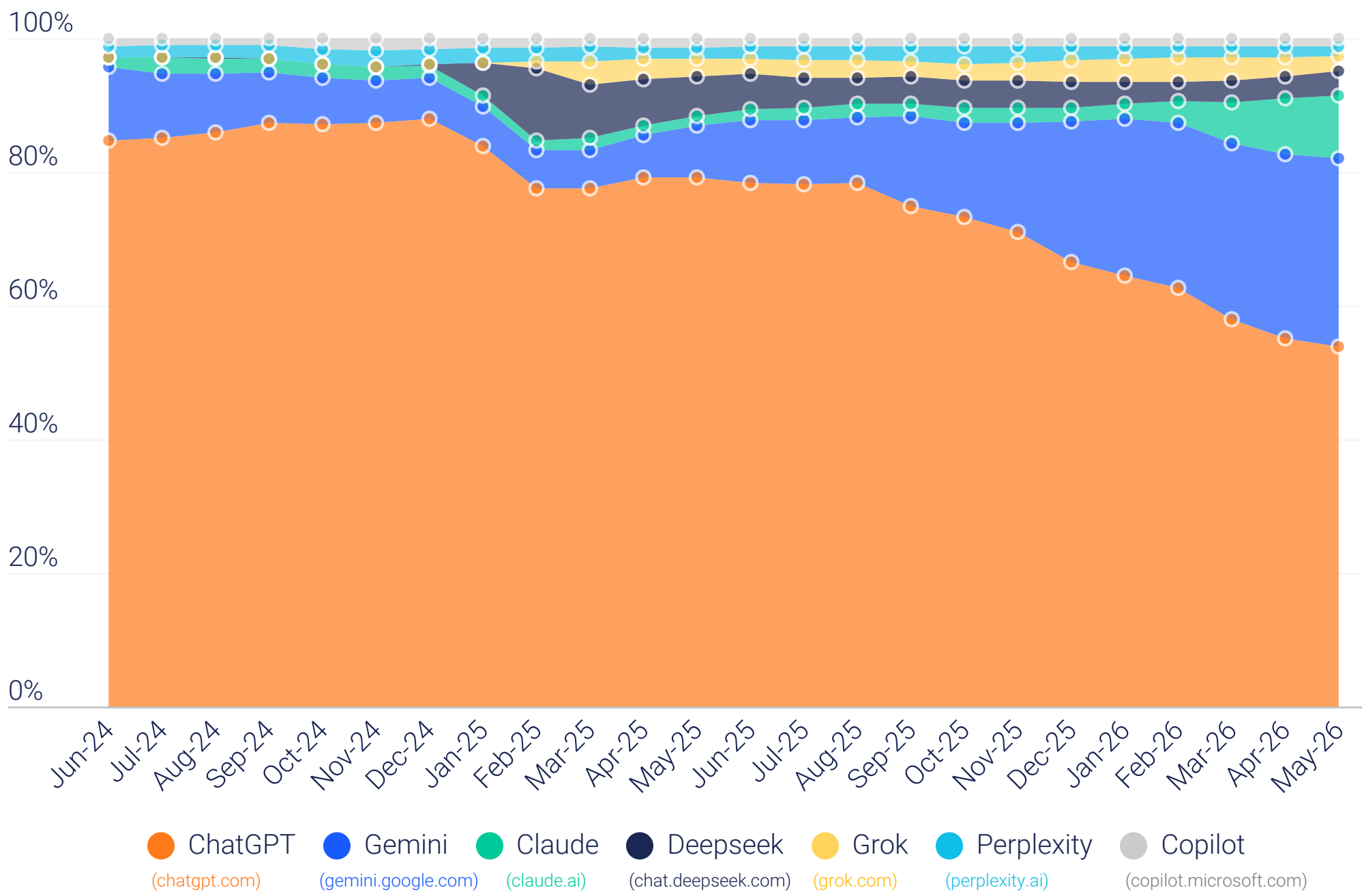
Competition intensifies in Web AI as challengers gain ground

While ChatGPT remains the largest standalone generative AI website by monthly visits, the web market has become significantly more competitive over the past year. Its share of web visits has steadily declined as rivals such as Gemini, Claude, Perplexity and DeepSeek continue to expand their audiences and establish meaningful positions across the web ecosystem.

These trends reflect increasing fragmentation in web-based AI usage rather than the broader AI market, where embedded AI experiences, such as Meta AI and Google AI Mode, are becoming increasingly important. Within standalone web experiences, platforms are differentiating through their capabilities, integrations and target audiences, creating a more competitive landscape than a year ago.

Gen AI Chatbot Websites by Visits

Worldwide, Desktop & Mobile Web, Jun 2024 – May 2026



Note: Data reflects the domain traffic highlighted under each company's name and does not represent AI embedment within other owned properties (e.g., Grok usage within x).

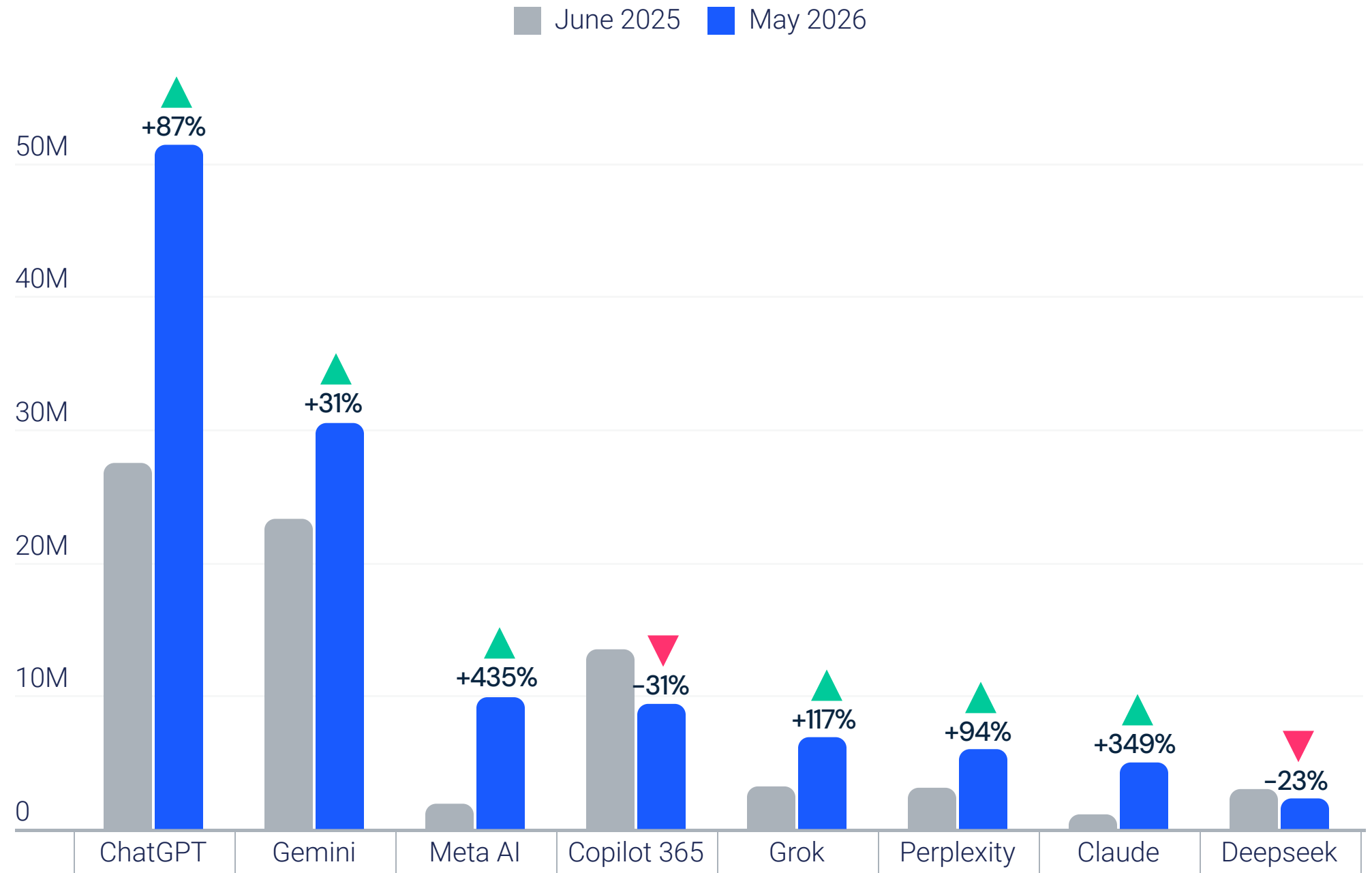
Competition is accelerating across the AI app market

When reviewing the app landscape, ChatGPT continues to expand its lead, but growth is not confined to the market leader. Gemini, Claude, Grok, Perplexity and especially Meta AI all posted strong year-over-year gains as users continue to experiment with an expanding range of AI experiences. This reflects a market that is still growing rapidly, with adoption spreading well beyond the first wave of AI assistants.

At the same time, momentum across the market remains uneven. Some early entrants have begun to lose ground while newer challengers are scaling quickly, illustrating how dynamic the competitive landscape has become. Success in AI will increasingly depend not only on attracting new users, but on continuously improving capabilities, deepening engagement and giving consumers compelling reasons to return as competition intensifies.

Standalone AI Apps by Monthly Active Users: Movement Within Date Period (Start vs End)

US, iOS & Android, May 2026 vs June 2025



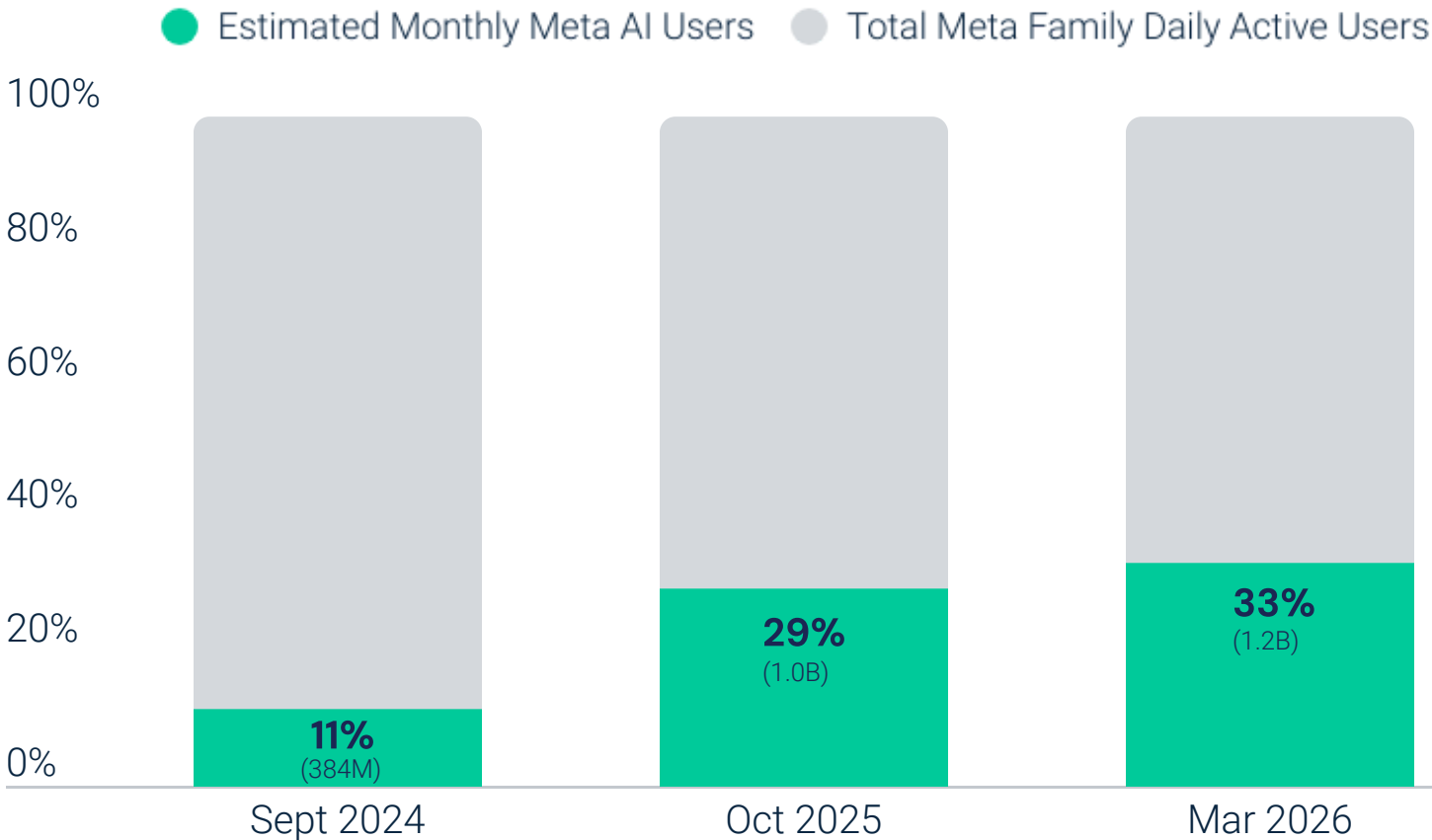
Note: Copilot is referring to Microsoft 365 Copilot only in the above graph

AI is being integrated across every major category

 Search	 Social	 Commerce	 Productivity	 Browsers
 Google AI Mode	 Meta AI (Instagram, Facebook, Messenger)	 Alexa for Shopping	 Microsoft 365 Copilot	 Perplexity Comet
 Bing Copilot	 WhatsApp AI	 Shopify Sidekick	 Google Workspace AI	 Opera AI

Meta AI: Publicly Reported Monthly Active Users

Worldwide, iOS & Android, Sept 2024, Oct 2025, Mar 2026



Source:: Meta public disclosures. Unlike standalone AI assistants, these users access AI through existing Meta applications, so the data should be interpreted as an indicator of embedded AI adoption rather than a platform market share comparison.

AI is no longer confined to standalone assistants. It is becoming embedded across search, social, commerce and productivity platforms that already reach billions of users. Meta AI demonstrates how quickly embedded AI can scale, with publicly reported monthly users more than tripling in 18 months. As AI becomes part of everyday digital experiences, the next battleground for brands will be earning visibility wherever these AI-powered interactions take place.

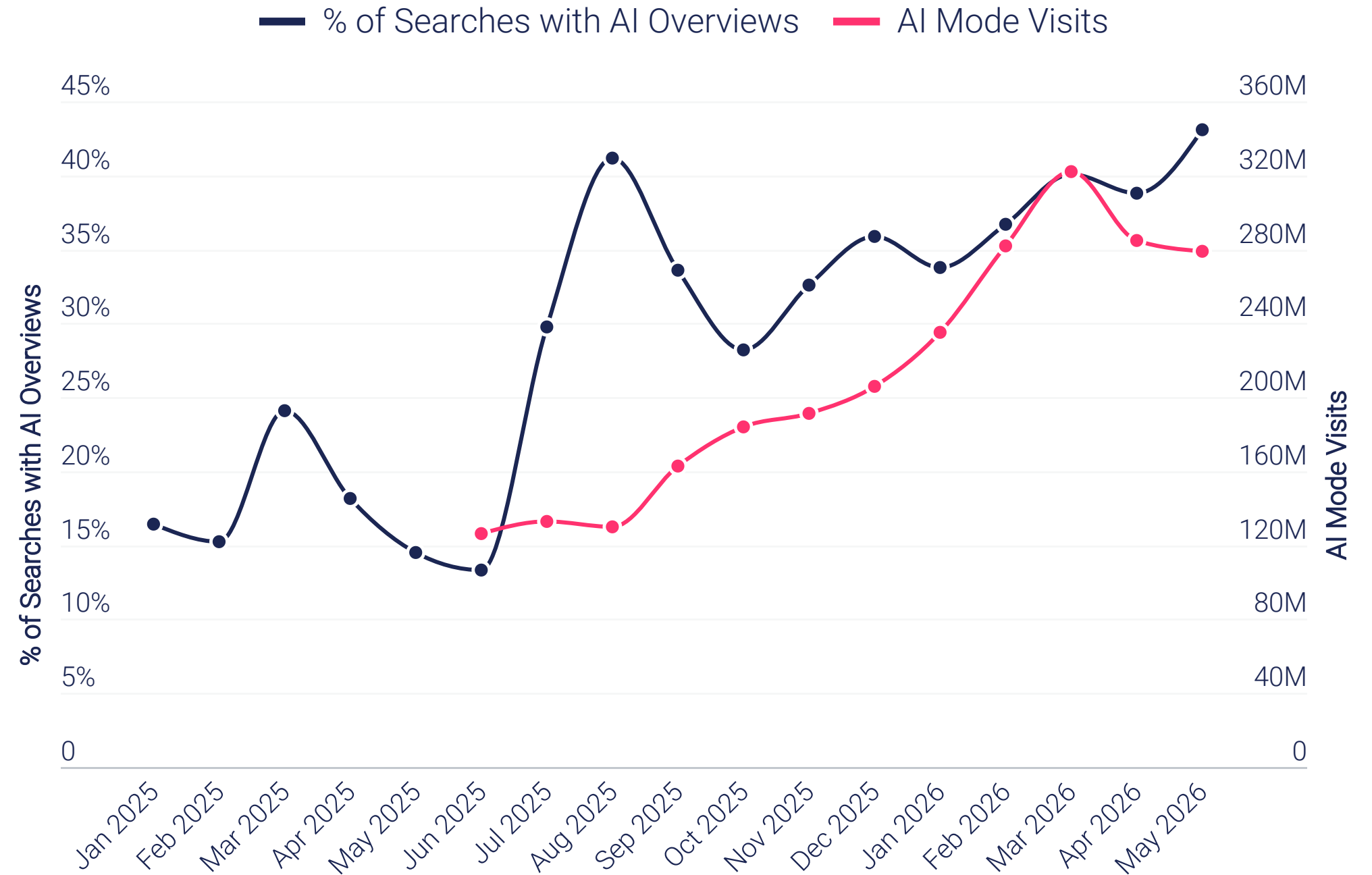
Google is pushing more search journeys into AI-native experiences

Google's AI search strategy is increasingly working as a funnel rather than a standalone feature rollout. AI Overviews are appearing in a growing share of searches, showing how quickly generative AI is being woven into the core Google search experience. What began as an AI layer on top of the SERP is becoming a more common part of the search journey itself.

At the same time, AI Mode visits have risen steadily since launch, suggesting Google is using those AI-generated results not just to enhance traditional search, but to pull users into a more conversational interface. Together, the two trends point to a broader shift in Google's product direction: from simply adding AI to search results toward gradually turning Search into a more AI-native experience.

AI Overviews (as a % of searches) and AI Mode Visits

US, Desktop & Mobile Web, Jan 2025 – May 2026



Amazon PDP views from Alexa for Shopping (formerly Rufus)
US, Desktop, Jun 2025 – May 2026 (indexed to June 2025)



Top Brands Receiving Traffic from Alexa for Shopping (formerly Amazon Rufus)
US, Desktop, Jun 2025–May 2026



< Beauty & Cosmetics >

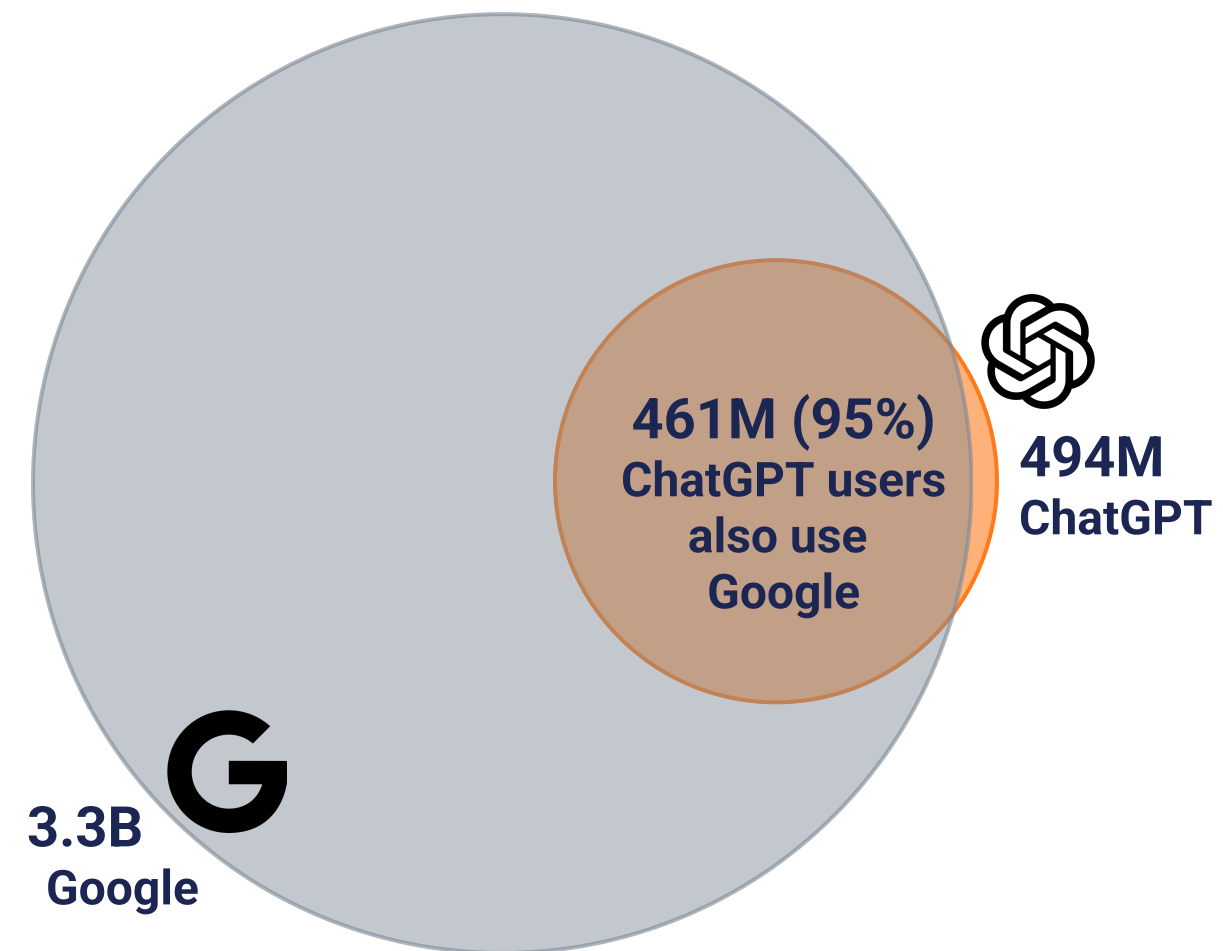
Rank	Brand
1	 CeraVe
2	 REVLON
3	 e.l.f.
4	 Norelco
5	 L'Oreal Paris
6	 The Ordinary
7	 Neutrogena
8	 MAYBELLINE
9	 La Roche-Posay
10	 NYX PROFESSIONAL MAKEUP

AI is rapidly expanding beyond standalone chatbots into the world's largest consumer platforms. Alexa for Shopping (formerly Amazon Rufus) has seen explosive growth over the past year, while already directing meaningful traffic to leading retail brands, such as CeraVe, Sketchers, Samsung, and Lego. As AI becomes embedded within shopping experiences, visibility inside AI-powered assistants is emerging as a new driver of product discovery and retail performance.

The AI market is competitive, not exclusive

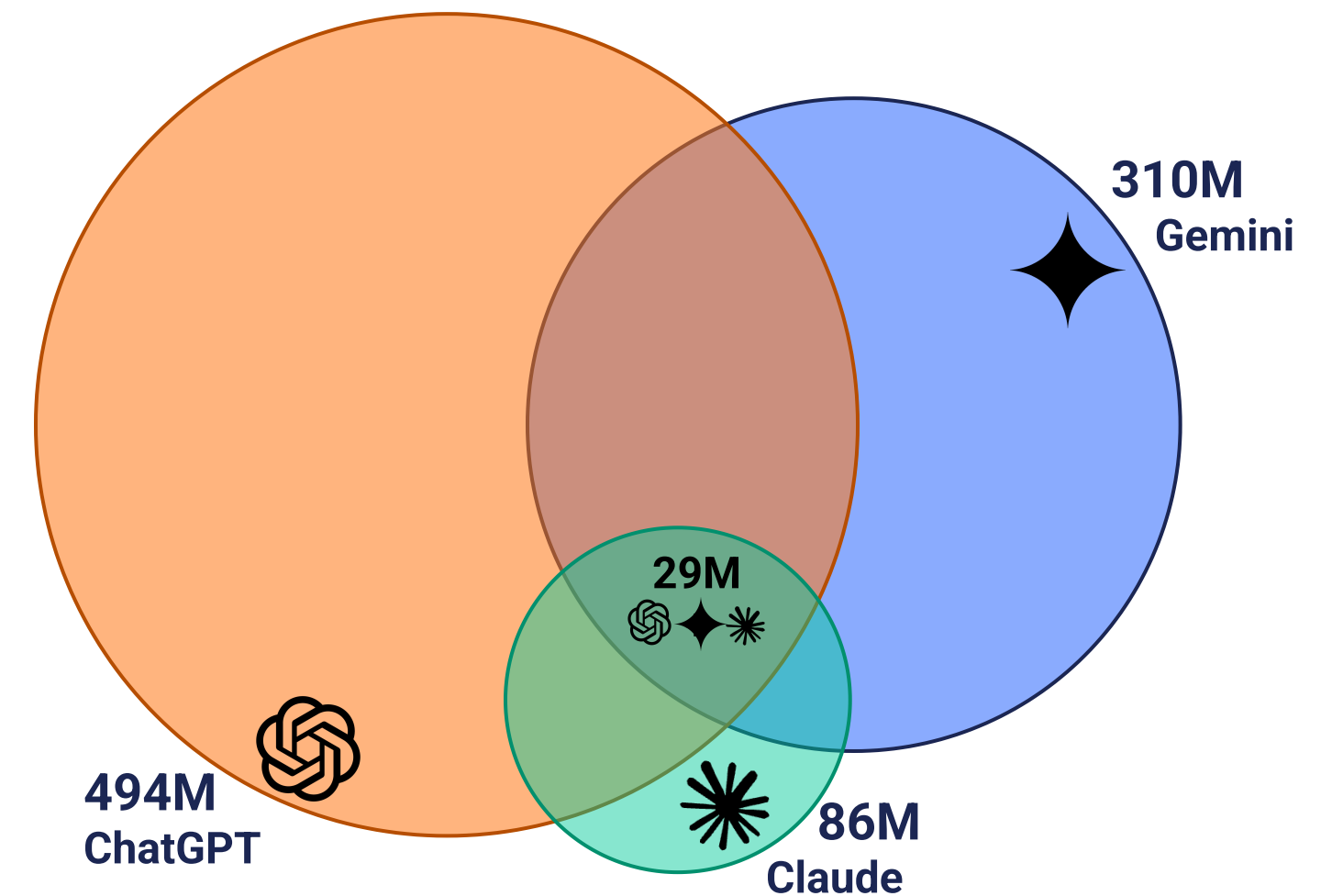
Audience Overlap – ChatGPT.com and Google.com

Worldwide, Desktop & Mobile Web, Mar 2026 – May 2026



Audience Overlap – ChatGPT.com, Gemini.google.com, Claude.ai

Worldwide, Desktop & Mobile Web, Mar 2026 – May 2026

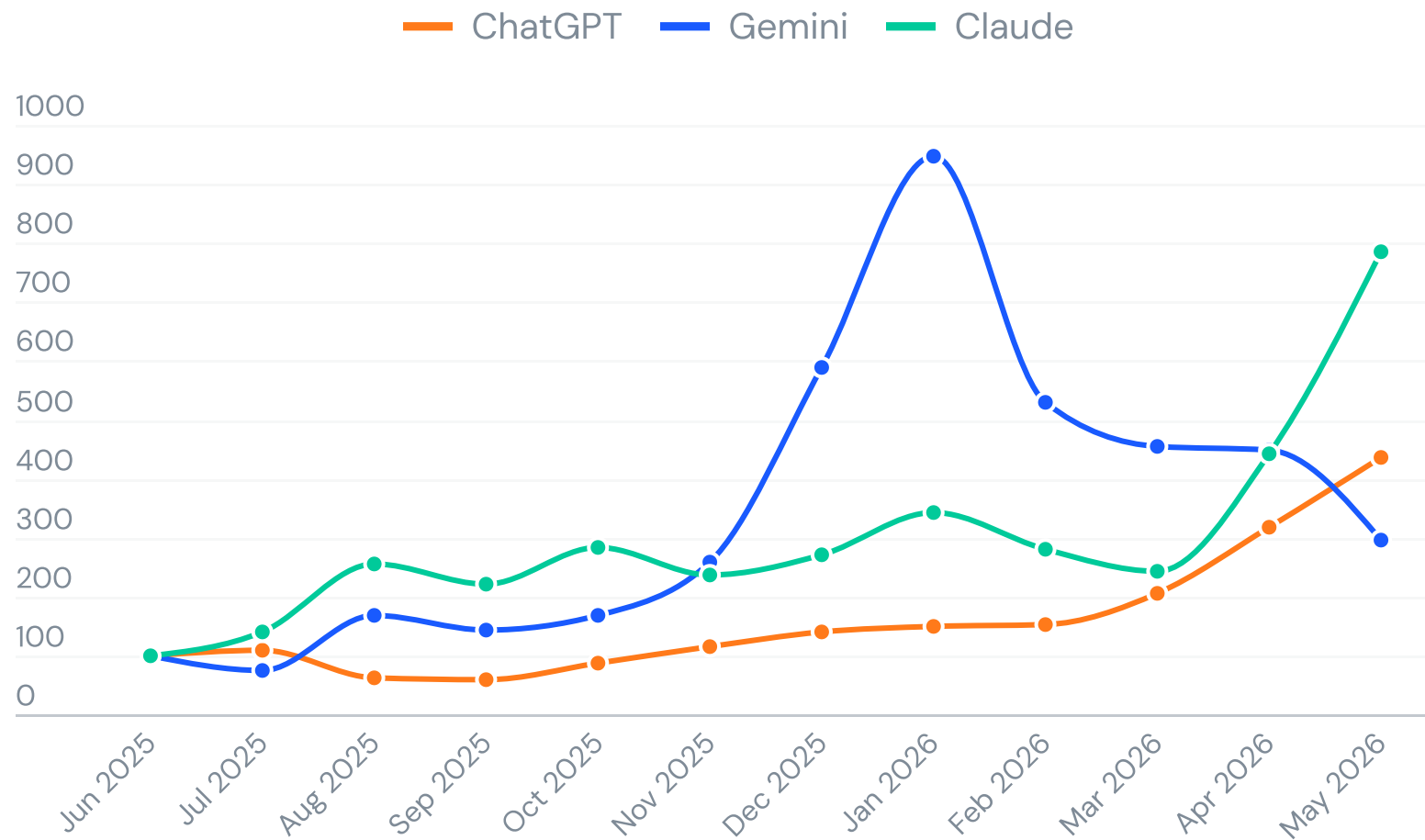


Generative AI is expanding how people find information, but it has not replaced traditional search. The vast majority of ChatGPT users also continue to use Google, while significant audience overlap across ChatGPT, Gemini and Claude shows that consumers are experimenting with multiple AI platforms rather than committing to a single assistant.

Competition is moving beyond product to paid acquisition

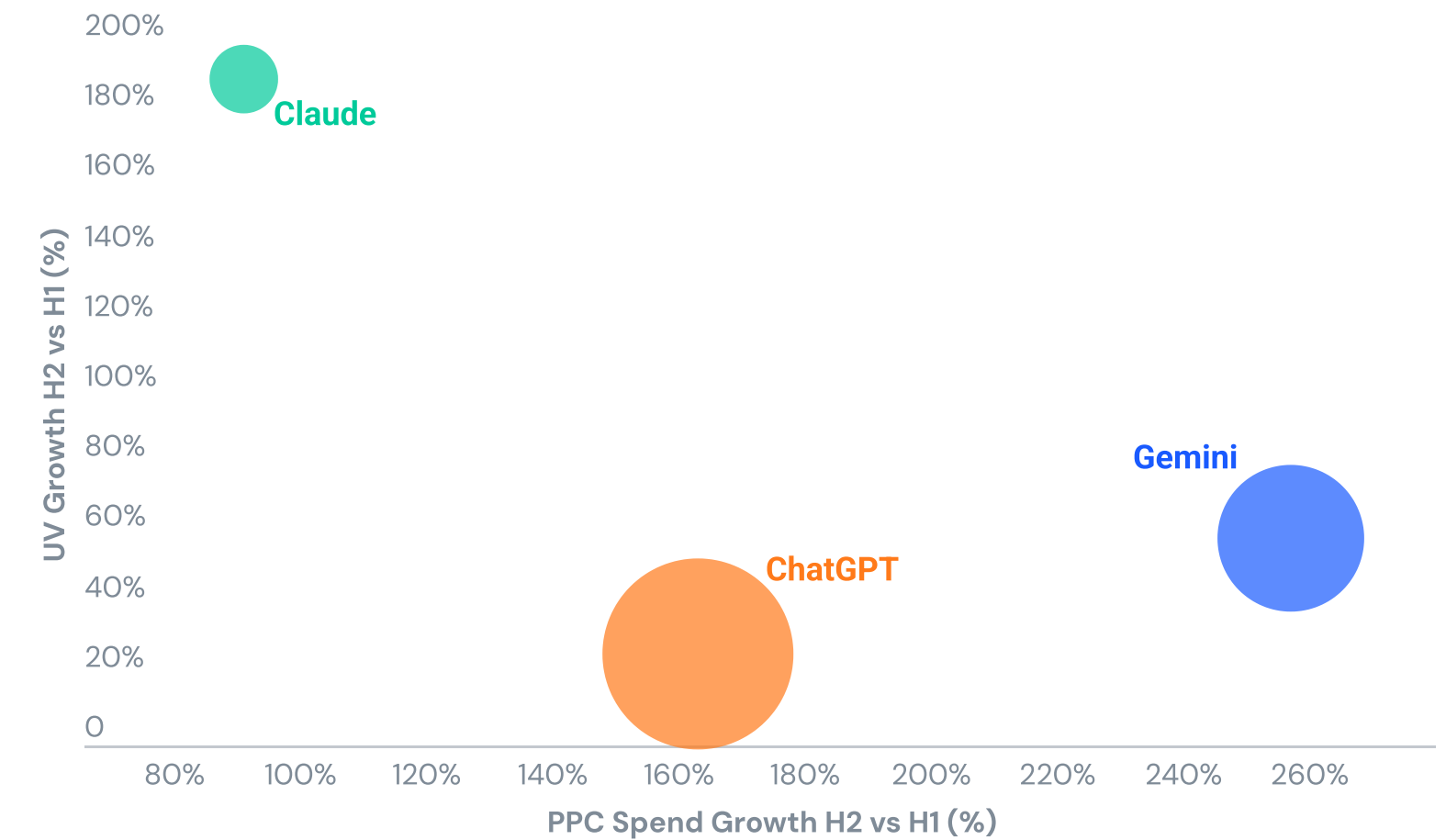
PPC Spend by platform (indexed to June 2025)

US, June 2025 – May 2026



Audience growth vs PPC spend growth by platform

US, Desktop & Mobile Web, Dec-May 2026 vs Jun-Nov 2025 (Bubble size = Monthly UVs H2)



Paid acquisition is becoming a bigger part of the AI platform playbook, but more spend is not automatically producing more growth. Gemini ramped PPC investment most aggressively over the past year, while Claude delivered the strongest audience growth despite a much smaller increase in spend. The result suggests that paid media is becoming an important lever in the fight for AI users, but ad budgets alone are not deciding the winners.

AI chatbots are becoming one of the web's largest destinations

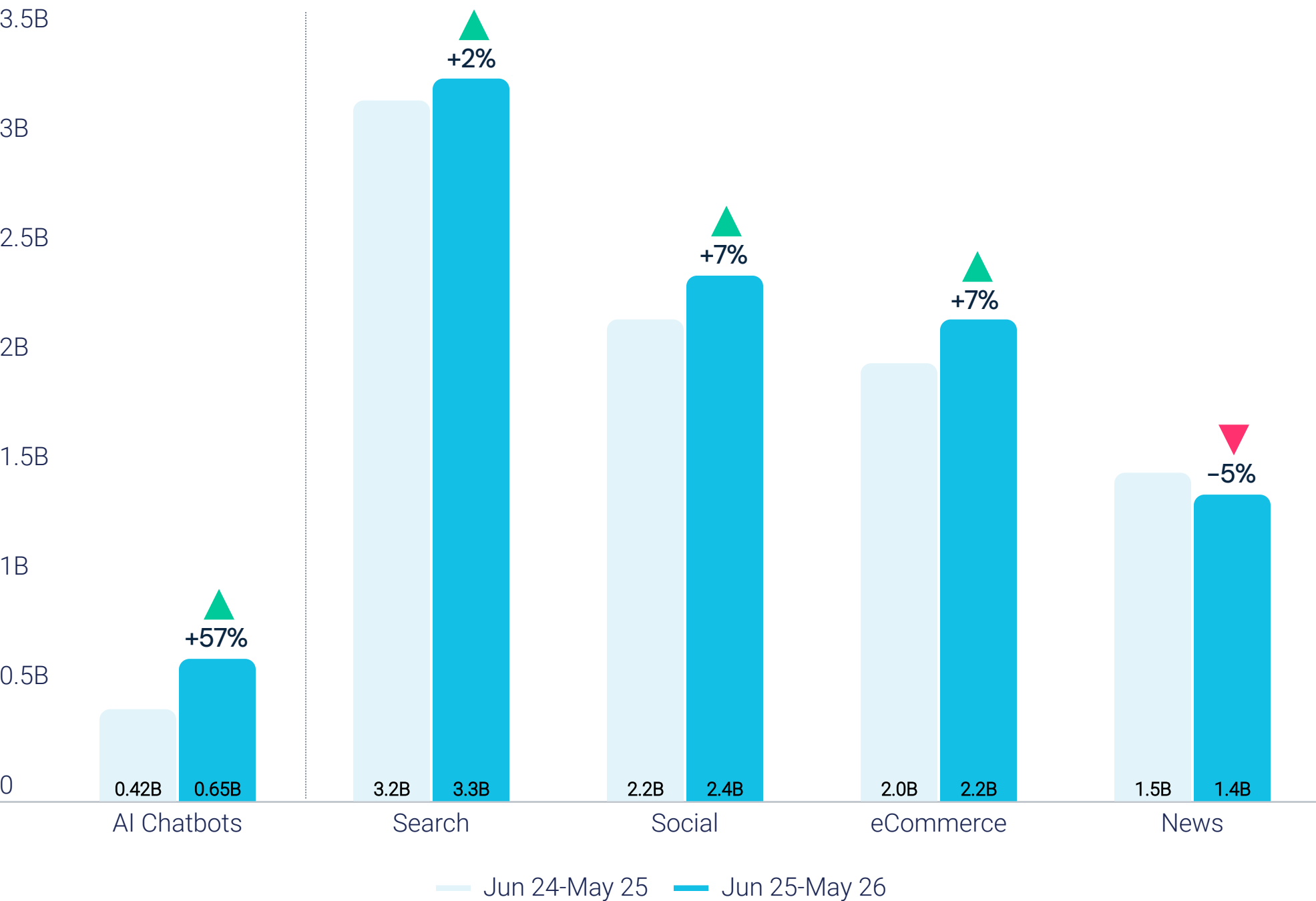
AI chatbots are rapidly establishing themselves alongside the internet's largest destination categories. Average monthly unique visitors grew 57% year over year to 655 million, making AI one of the fastest-growing areas of the web while more mature categories such as Search, Social and eCommerce recorded comparatively modest growth.

"Although AI remains smaller than these established categories, its growth trajectory is fundamentally different, as it continues to establish itself as a foundational layer of the internet for multiple use cases. News and publisher sites, on the other hand, need to find new ways to attract and maintain audiences in the era of AI, with a focus on audience engagement, loyalty and less expectation on traditional channels giving back the same results"



Harry Clarkson-Bennett
Partner
DJB Strategies (ex-Telegraph)

Top Web Categories by Average Monthly Unique Visitors
Worldwide, Desktop & Mobile Web, Jun 2024 – May 2026



02

USER BEHAVIOR WITHIN GEN AI SESSIONS

AI usage demographics is spreading

AI is becoming increasingly mainstream, with adoption spreading across older age groups as their share of chatbot usage continues to rise. Gen Z and Millennials were the early adopters, but now account for a smaller share of usage than two years ago. Now, half of users are age 18–34 and half are 35+, a far more balanced picture compared to two years ago.

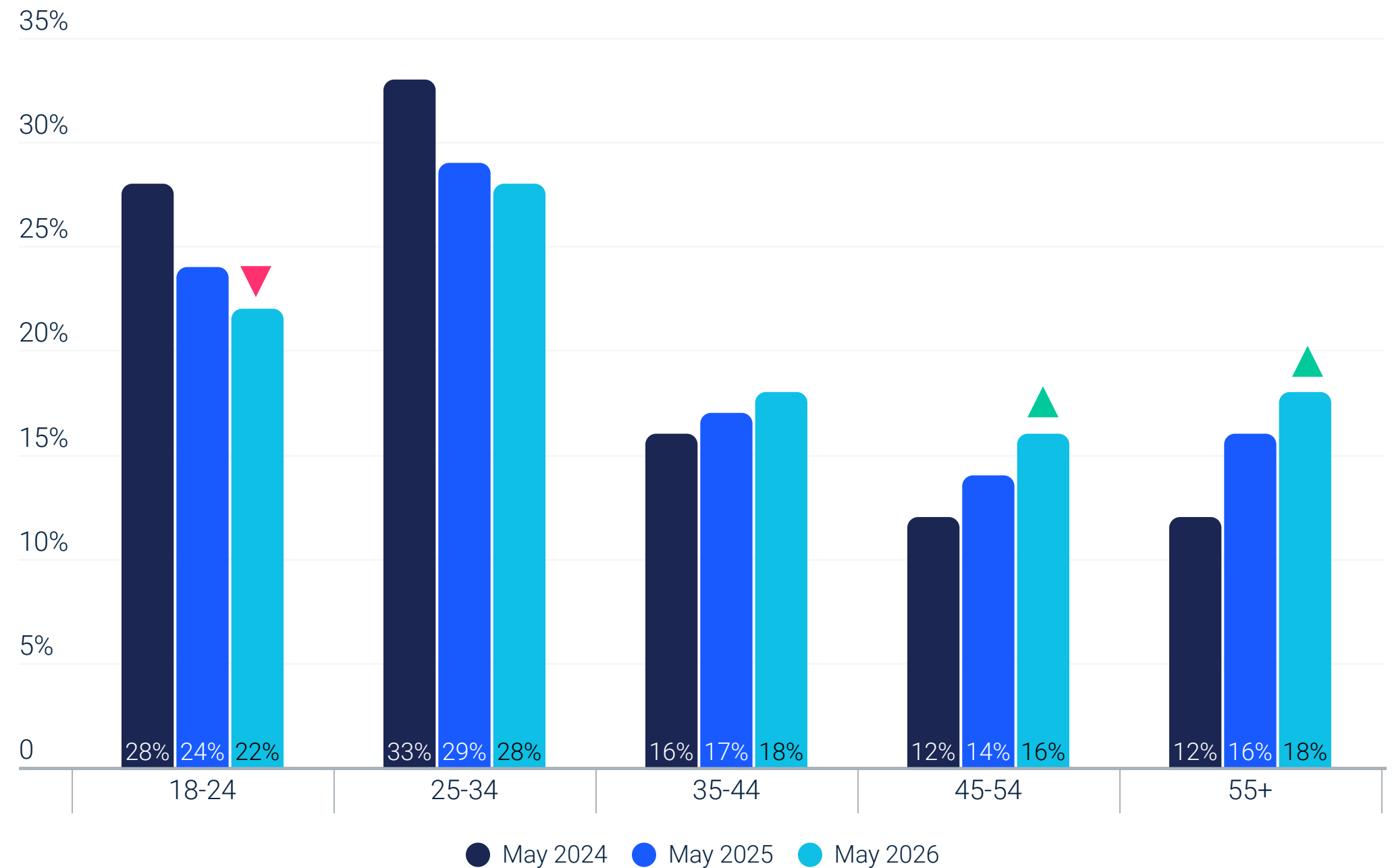
“When adoption climbs fastest among older users, it's a signal the technology is moving past early-adopter hype and into everyday habit. Growth concentrated in younger demographics can fade with trends; growth spreading into older generations is often what durable, mainstream adoption looks like.”



Michael Horrocks
Head of Organic & Website
Miro

Gen AI Chatbots Usage by Demographic Groups

US, Desktop & Mobile Web, May 2024, 2025, 2026



Early signs of AI fatigue are emerging among Gen Z



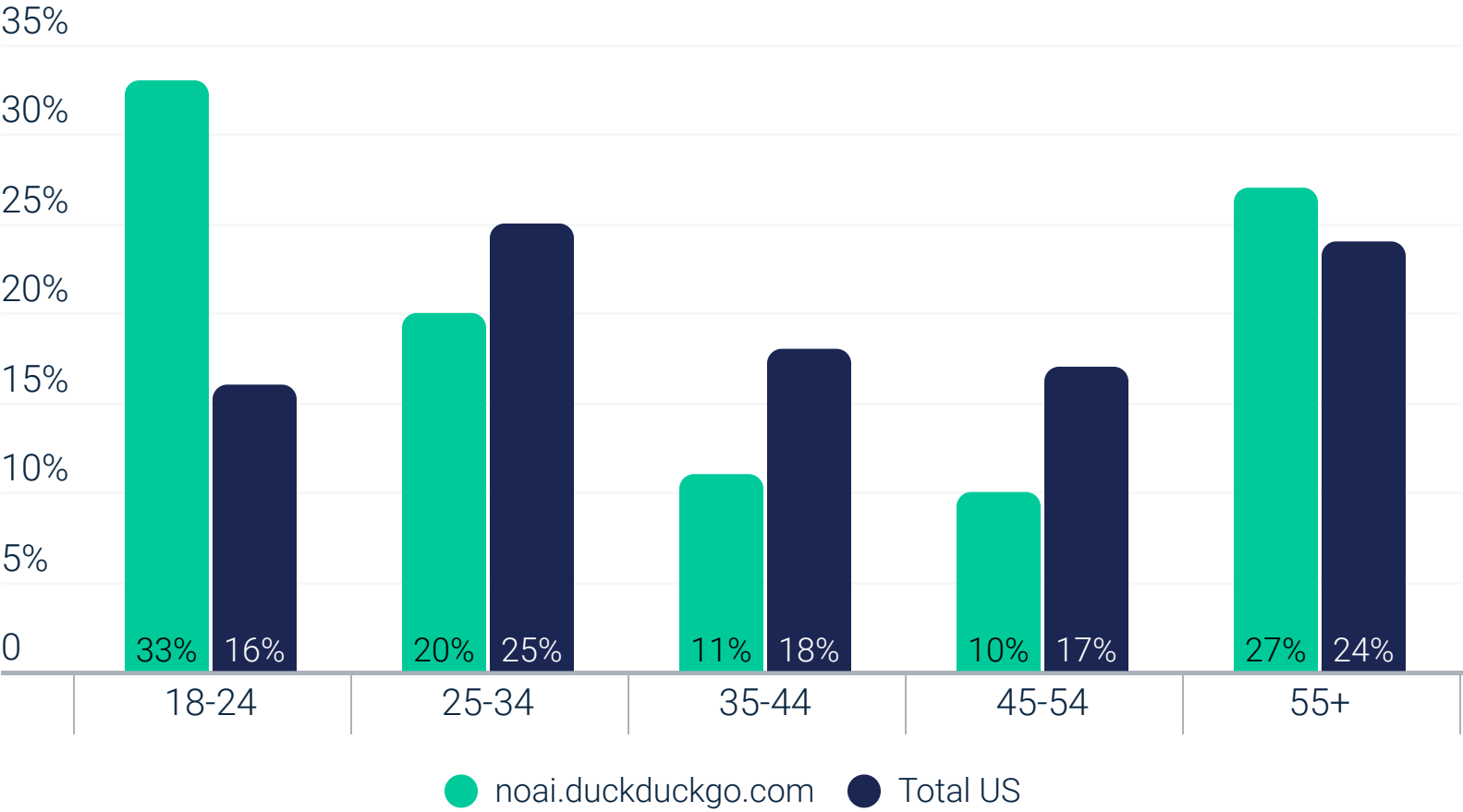
News > World > Americas

‘F* this guy’: Graduation speakers can’t stop talking about AI and students are over it**



Commencement speakers booed by graduates at mention of AI

noai.duckduckgo.com Usage by Demographic Groups
US: Mar 2026–May 2026



While older generations increase their adoption of AI tools, Gen Z forms a growing anti-AI movement. Recent graduation speeches across the US have been met with backlash from graduates, as speakers focus AI growth and importance. Specific AI-free tools, like DuckDuckGo's No-AI search engine, attract a disproportionately young audience. These signals suggest some of AI's earliest adopters may be becoming more selective about when and how they use generative AI.

ChatGPT's use cases now span every aspect of work and life

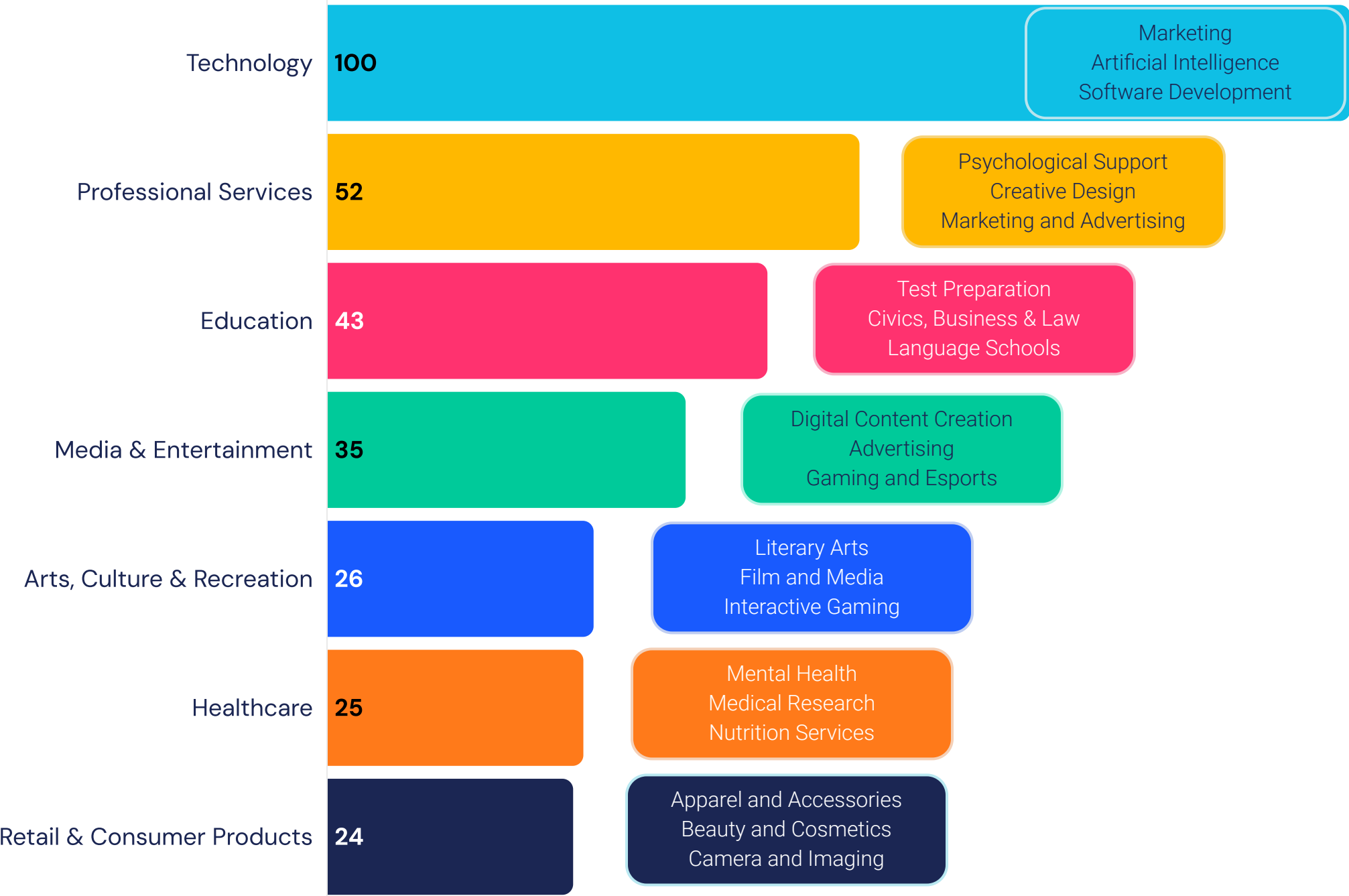
ChatGPT has evolved far beyond a general-purpose chatbot into a platform supporting an increasingly diverse range of work, learning and everyday tasks. While technology remains the largest conversation category, users are now seeking help across professional services, education, healthcare, retail, media and creative pursuits.

The leading subcategories reveal how AI is being applied in practice. From software development and artificial intelligence to psychological support, test preparation, digital content creation and online shopping, generative AI is becoming a versatile assistant that spans both professional and personal life

Want to see these insights in action?

Book a live demo now >

Top ChatGPT Conversation Categories and Subcategories (indexed to leader)
US, Desktop, May 2026



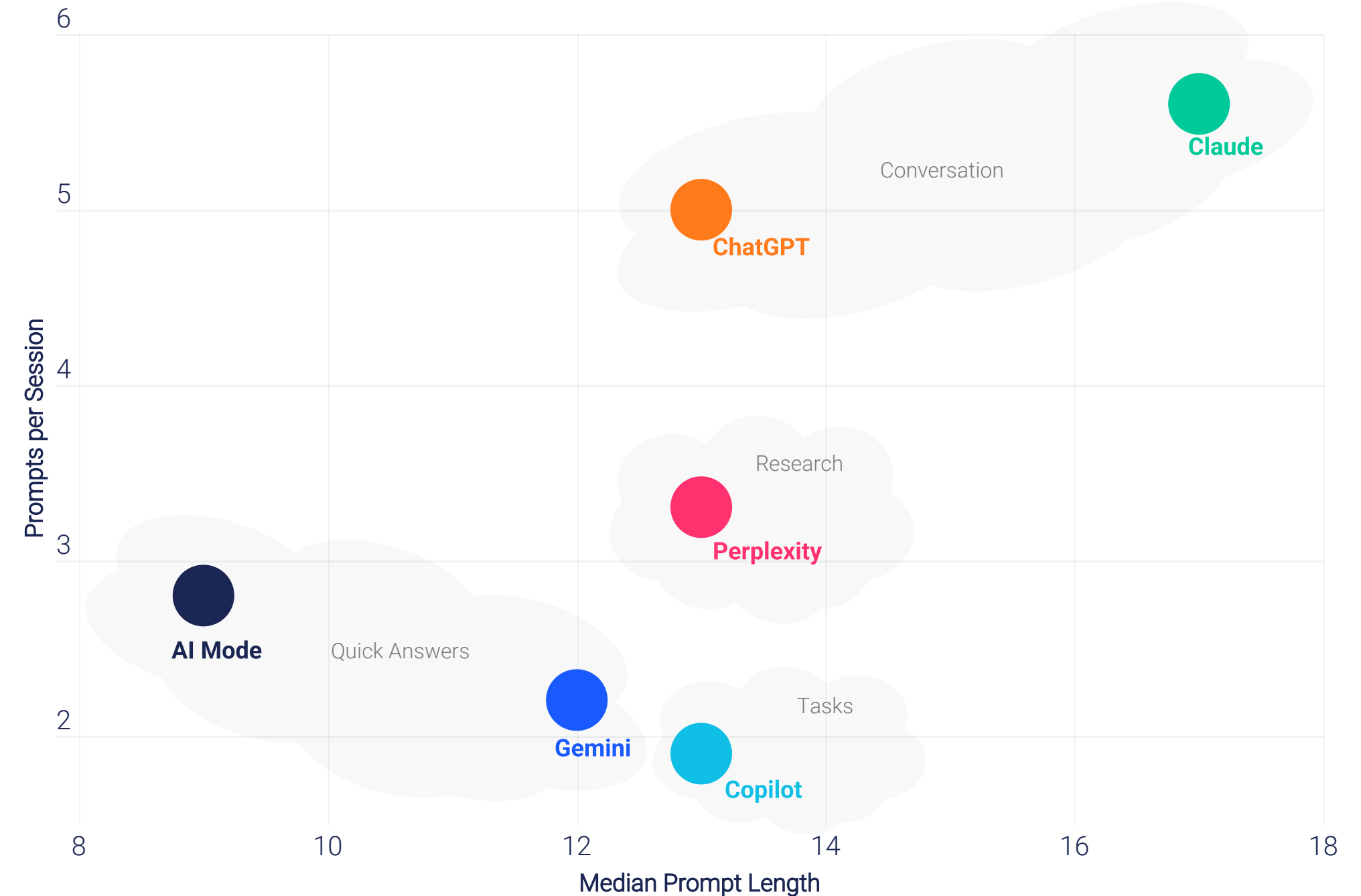
AI platforms are evolving distinct roles

Users interact with AI platforms in markedly different ways. Claude and ChatGPT are leading conversation experiences, with users writing longer prompts and engaging in more back-and-forth interactions. Claude stands out on both dimensions, reflecting its strength as a collaborative partner for complex reasoning, planning and writing, while ChatGPT combines deep engagement with a broad range of everyday use cases across work, study and personal life.

By contrast, Gemini and Copilot are optimized for speed and execution. They are used with shorter prompts and fewer prompts per session, aligning with search, quick answers and task completion. Perplexity occupies a middle ground, balancing conversational depth with research-focused interactions. Rather than converging on a single experience, AI platforms are increasingly differentiating into distinct roles, giving users more choice depending on whether they need conversation, research, productivity or fast answers.

Prompt Length x Prompts per Session by AI Platform

US, Desktop and Mobile Web, Jun 2025 – May 2026



AI Platforms Are Attracting Different Types of Users



Category Website Affinities by AI Platform (index vs Google Search visitors (Google = 100))
Worldwide, Desktop, Oct 2024–Sep 2025

ChatGPT:		
More likely to visit these website categories		
	Restaurants & Delivery	2.4x
	Health	2.3x
	Fashion & Apparel	2.1x
	Sports	1.6x
	Banking & Lending	1.3x
Everyday Consumers		

Claude:		
More likely to visit these website categories		
	Universities & Colleges	25x
	Programming	3.0x
	Business Services	3.0x
	Jobs & Employment	2.7x
	Investing	1.4x
Professionals & Students		

Gemini:		
More likely to visit these website categories		
	Graphics & Web Design	4.8x
	Computer Security	3.1x
	Computer Hardware	2.2x
	Music	1.5x
	Video Games	1.4x
Tech Enthusiasts		

AI platforms are becoming differentiated not just by what they can do, but by who uses them. Each platform is attracting a distinct audience with its own broader digital habits. ChatGPT attracts users with broad consumer interests, Claude over-indexes heavily among professionals and university users, while Gemini skews toward technology-focused audiences. As AI Search matures, understanding who each platform attracts will become just as important as understanding what each platform can do.

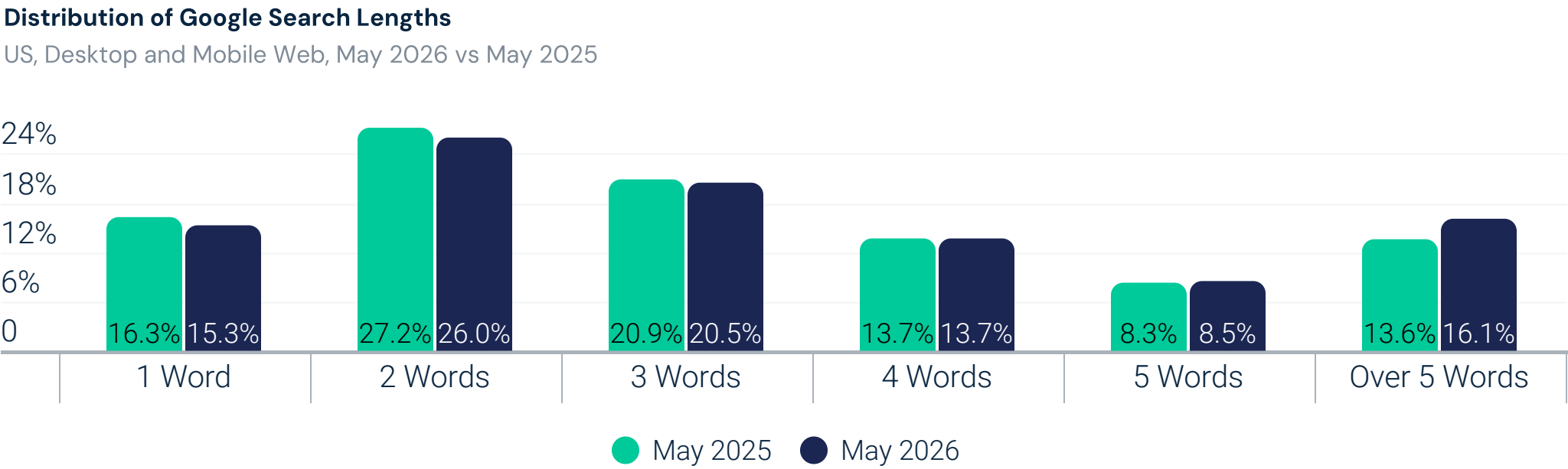
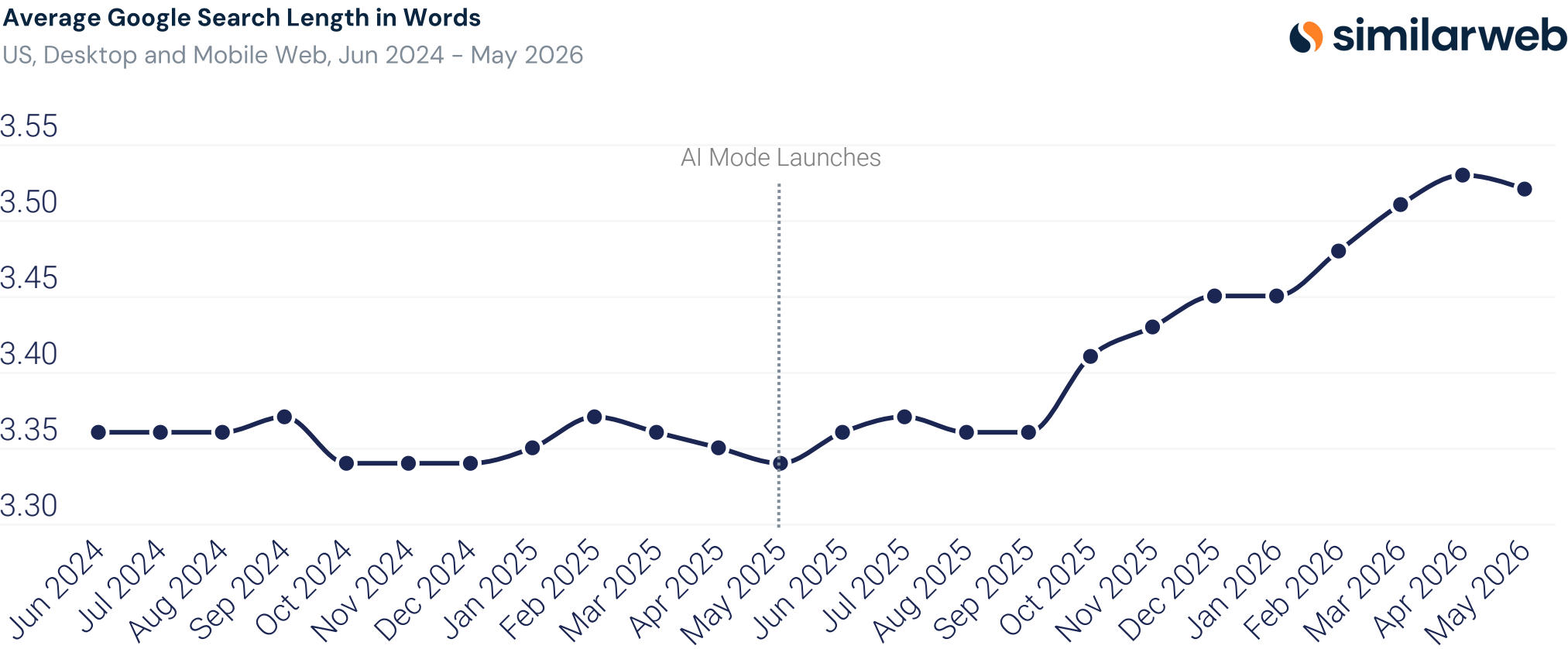
AI is Changing How People Search on Google

The way people search is beginning to change. As consumers spend more time interacting with AI chatbots, they are bringing those prompting habits back into traditional search. Average Google search length has risen steadily over the past year, suggesting users are replacing short keyword searches with longer, more natural language queries that resemble AI prompts.

“Users historically learned to translate their intention into quick short search queries. LLMs now can fulfill long complex prompts that search previously couldn't fulfill. As usage of AI and AI mode has increased, we see that searches are increasing in length and people are now adopting a new more natural way to search and discover.”



Ethan Smith
Industry Expert and CEO
Graphite



03

AI OUTPUT & BRAND PERFORMANCE

Early leaders are emerging in AI visibility

AI visibility is becoming an increasingly important competitive battleground, but success is highly category-specific. The brands leading AI visibility today are those that have built strong authority and relevance within their respective industries, with clear leaders emerging across beauty, finance and travel.

"For brands in 2026, tracking Share of Voice is critical because it has 2 benefits: a) it's a relative comparison in a stochastic world, and b) it prioritizes visibility over citations. In my studies, I see over and over again that users focus on brand mentions instead of clicking on sources. Visibility is success."



Kevin Indig
Industry Expert & Founder
Growth Memo

Most Visible Brands in GenAI (indexed to category leader)
US, Desktop & Mobile Web, May 2026



AI recommendations shape where users go next

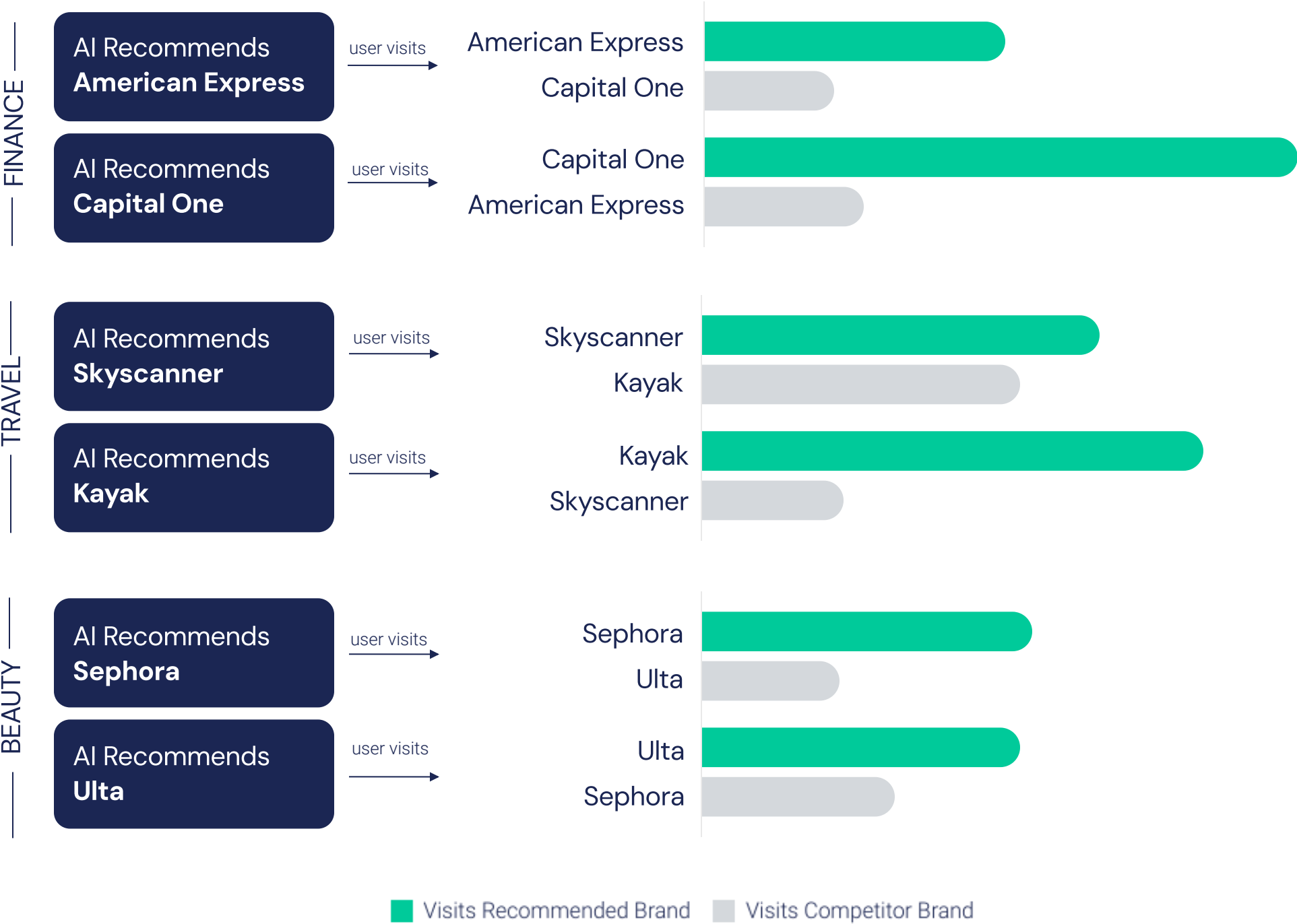
Users are far more likely to visit an AI-recommended brand than a competitor that wasn't recommended: AI-recommended brands saw two to four times as many subsequent visits. AI is unlikely to decide every purchase, but it's increasingly shaping the shortlist. As it becomes a bigger part of product discovery, visibility is a competitive edge that outlasts the conversation itself.

"This data is a near-replica of how advertisers in the 20th Century measured the impact of billboards, TV, and radio advertising using lift in store visits or sales. Whether we're talking about a brand's visibility on the side of a highway in 1926 or its presence in an AI tool's response in 2026, it's clear that influence is happening. What marketers must do now is change the way they run measurement and attribution."



Rand Fishkin
Industry Expert & Founder
SparkToro

Percentage of Users who Visit an AI-recommended brand vs a competitor
US, Desktop, Jul 2025-Dec 2025



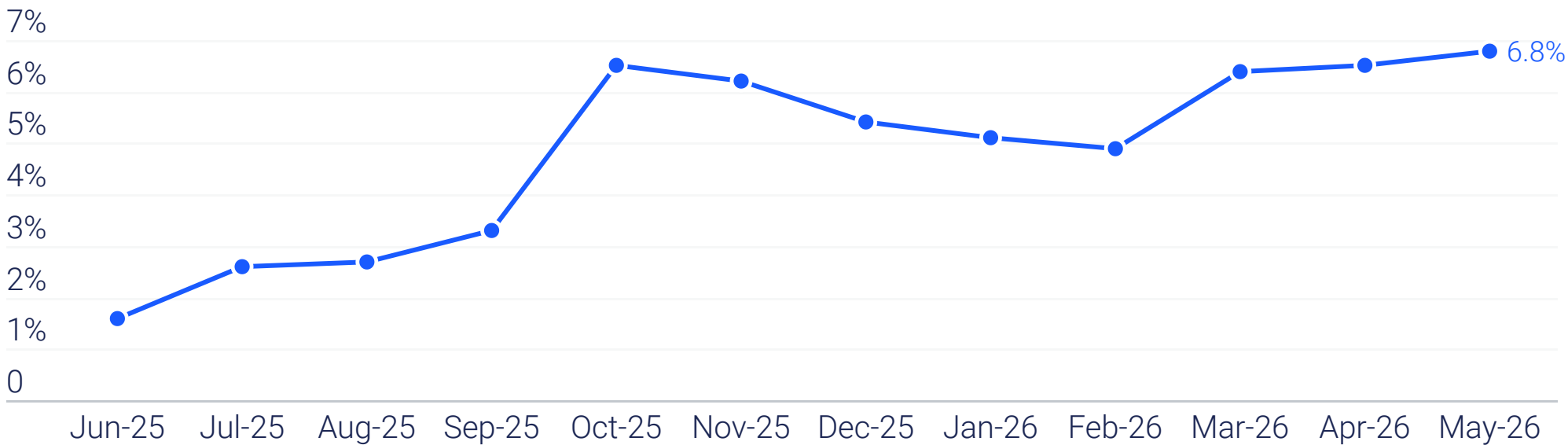
AI is searching the web more often to answer user questions

AI platforms are increasingly turning to the live web to answer user questions, driving a steady rise in responses that include citations. In less than a year, the share of AI answers containing web citations has increased more than fivefold, reflecting a broader shift toward fresher, more current and more verifiable information. Rather than relying solely on pre-trained knowledge, AI models are increasingly retrieving live information to improve the quality and reliability of their responses.

This behaviour is not consistent across industries. Travel, retail and sports generate cited responses far more frequently than the overall average, suggesting AI is most likely to search the web when users are comparing products, planning purchases or seeking up-to-date information. As "search the web" becomes a more common part of the AI experience, brands will have more opportunities to influence AI-generated answers through high-quality, authoritative content.

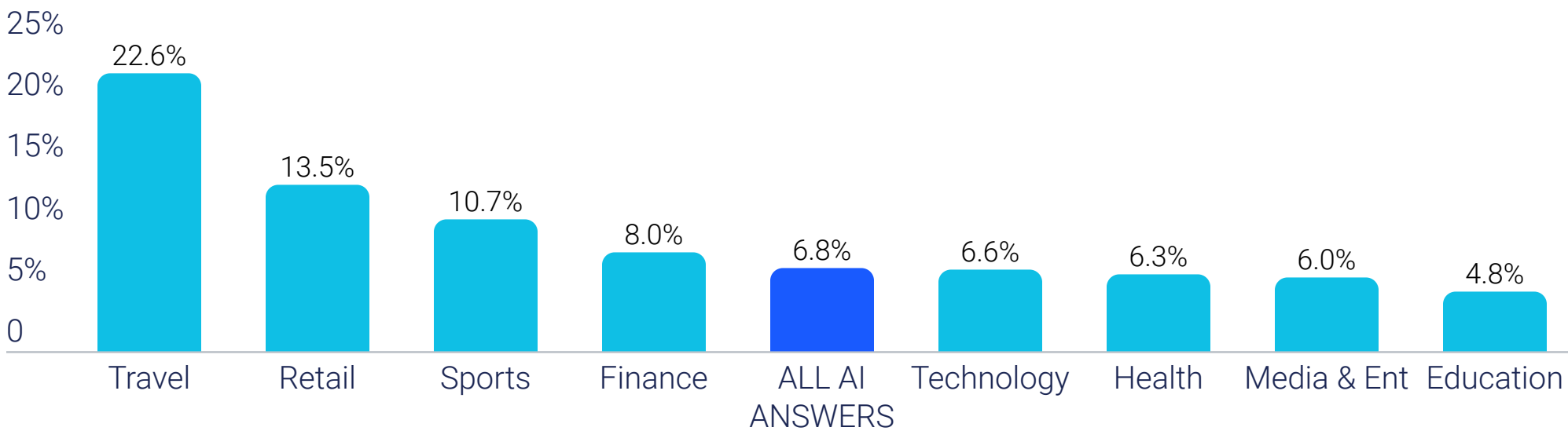
Percentage of ChatGPT Answers with Citations

US, Desktop, Jun 2025-May 2026



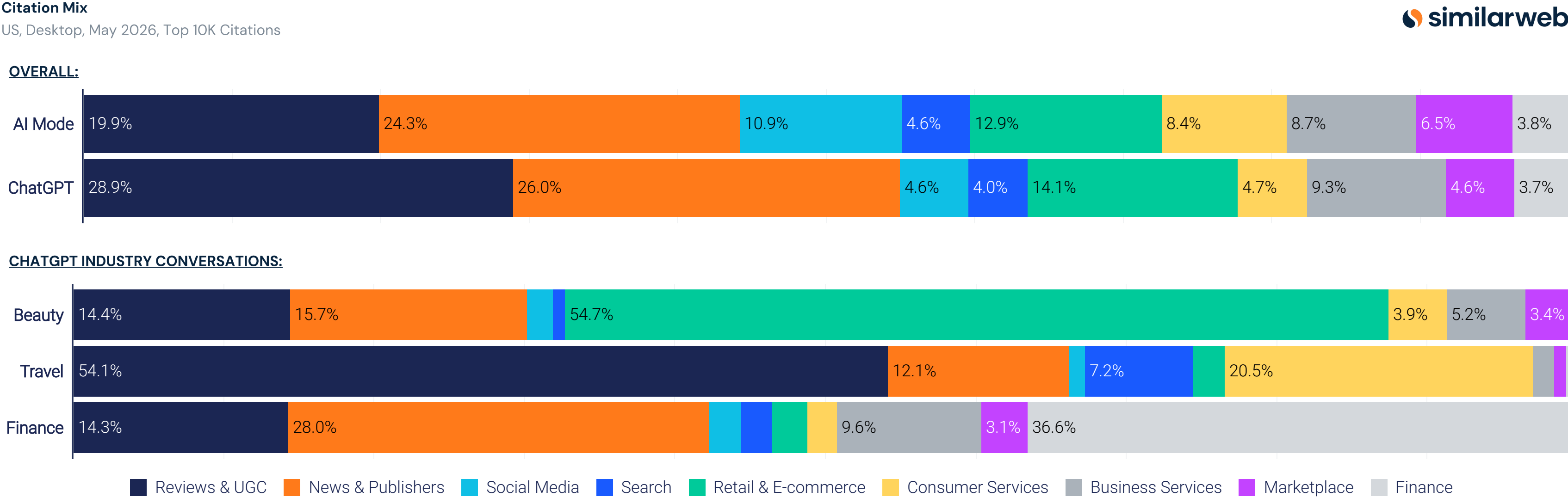
Percentage of ChatGPT Answers with Citations by Industry

US, Desktop, May 2026



WINNING IN GEN AI

The sources AI cites depend heavily on the question



The sources AI models cite vary dramatically depending on the topic. While reviews and publishers dominate overall, beauty conversations overwhelmingly reference e-commerce brands, travel relies on reviews and user-generated content, and finance draws heavily from specialist financial publishers. There is no universal AI optimisation strategy—brands need to understand which content types AI trusts in their category.

Expert advice: Your AI search visibility depends on solid foundations

"GEO is a new layer on top of traditional SEO, but many of the fundamental approaches to drive visibility remain the same. Every major AI search product relies on **RAG (retrieval-augmented generation)**, which means live retrieval is dependent on positioning well within search engines. If your organic visibility dips, your AI search visibility will follow, as language models are less likely to retrieve your content.

The good news is that driving AI search and SEO visibility aren't mutually exclusive. Brands that focus on genuinely useful, unique content and solid technical foundations tend to perform well in both.

Recently, we've seen issues arise when brands accelerated content production using AI tools in an effort to drive AI search visibility, but hurt their SEO performance in the process. We're now seeing the inevitable decline in traffic and visibility for a lot of those sites, and because they cut corners on focusing on high-quality, valuable content, they're facing an even steeper climb back in both SEO and GEO than if they'd never chased the shortcut in the first place.."



Lily Ray

VP of SEO & AI Search at Amsive
Founder of Algorythmic

AI answers are only as good as the content it can find.

1 User Prompt



"What are the best CRM solutions for small businesses?"

2 AI Searches the Live Web



AI models query search indexes to find relevant, up-to-date content.

3 Retrieves Relevant Sources



Brand Pages



Reviews & Ratings



Articles & Blogs



Product Pages



Documentation & Guides



News & Press

The most relevant and authoritative content is selected.

4 Generates Answer with Citations



The AI synthesizes the information and provides an answer, with links to the sources.

Sources

[brand.com/blog/...](#)

[reviewsite.com/...](#)

[news.com/...](#)

...

5 User Gets Better Answers



More relevant, trustworthy answers lead to better decisions.

RAG

/retrieval-augmented generation/

noun

The technology behind AI search tools. Instead of relying only on training data, the model retrieves live content from search indexes, then generates an answer based on what it finds, meaning your visibility in AI search depends on your visibility in the underlying search results.

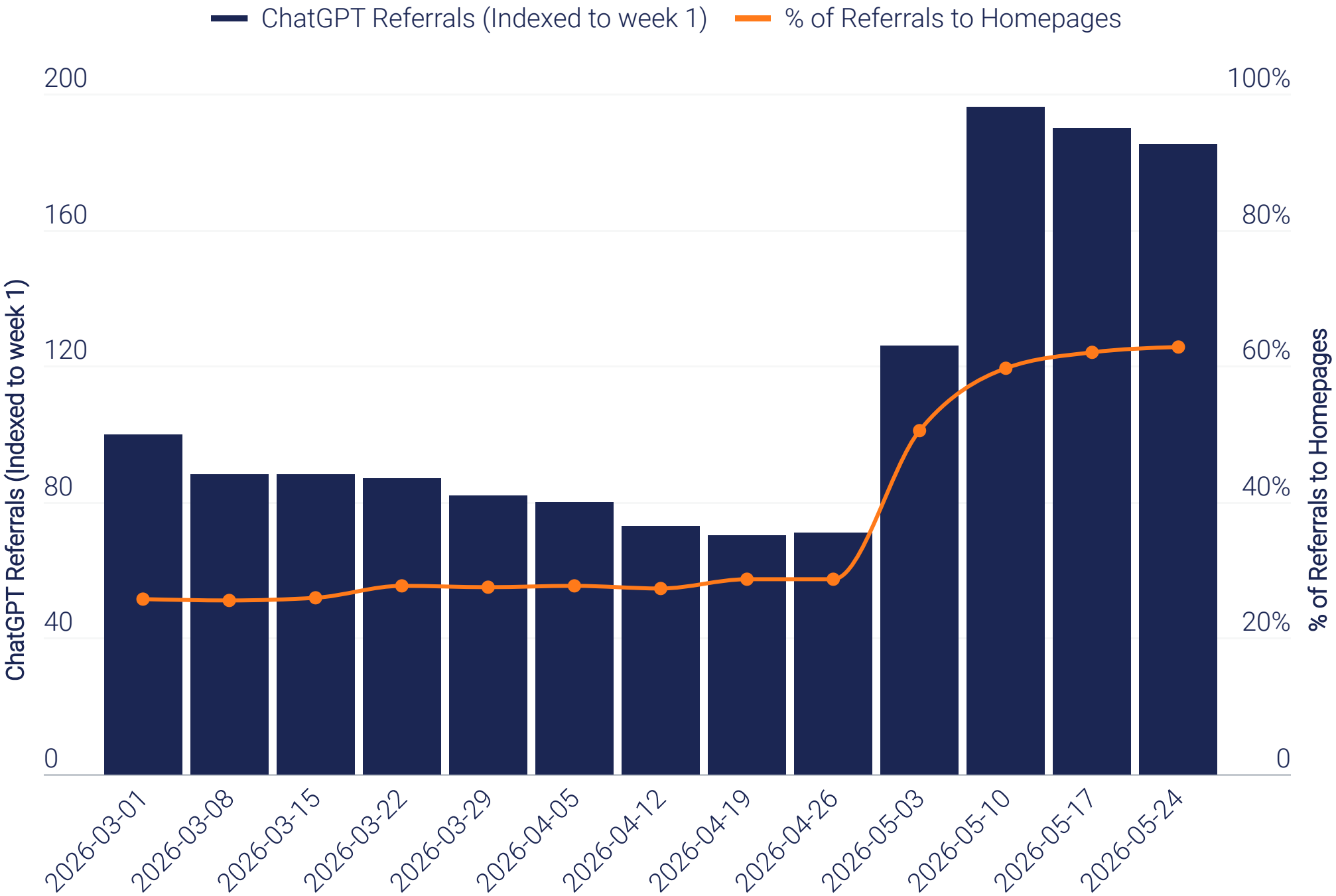
Recent ChatGPT changes have reshaped referral behavior

ChatGPT's May 7 search update marked a significant shift in how users navigate from AI answers to the web. Referral traffic increased sharply in the weeks following the update, while the proportion of visits landing on homepages more than doubled, rising from around 25% to nearly 60%. Rather than sending users directly to individual content pages, ChatGPT increasingly became a gateway to brands themselves.

This represents a subtle but important change in AI-driven discovery. Users are increasingly using the prominent blue links within AI responses to begin exploring a company's website, often starting at the homepage before navigating further. As AI search evolves, brands need to think beyond optimizing individual pages and ensure their overall website experience is ready to convert AI-driven visitors.

Indexed Volume of ChatGPT Referrals and % to Homepages

US, Desktop, W/C Mar 01 2026 - W/C May 30 2026



AI referrals are expanding rapidly across industries

Despite comprising a small proportion of overall traffic, AI referrals continue to grow across industries. Industries seeing the greatest growth are typically ones with a smaller base, such as Beauty and Fashion. Larger industries, like Travel and News, have seen smaller growth due to their already large volume of AI referrals.

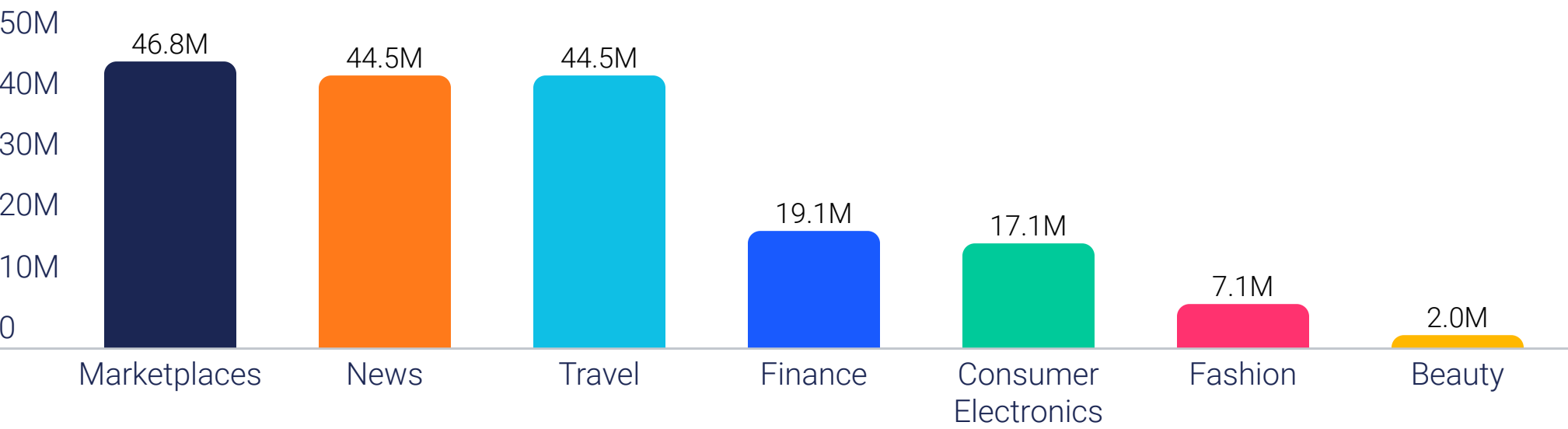
Marketplaces, notably, is an outlier. This industry, which consists of giants Amazon and Temu, holds the largest volume of AI referrals and continues to see significant growth. This highlights how AI favours large, multi-category platforms over smaller, vertical-specific sites.

Want to see how
your brand
compares?

Book a live demo now >

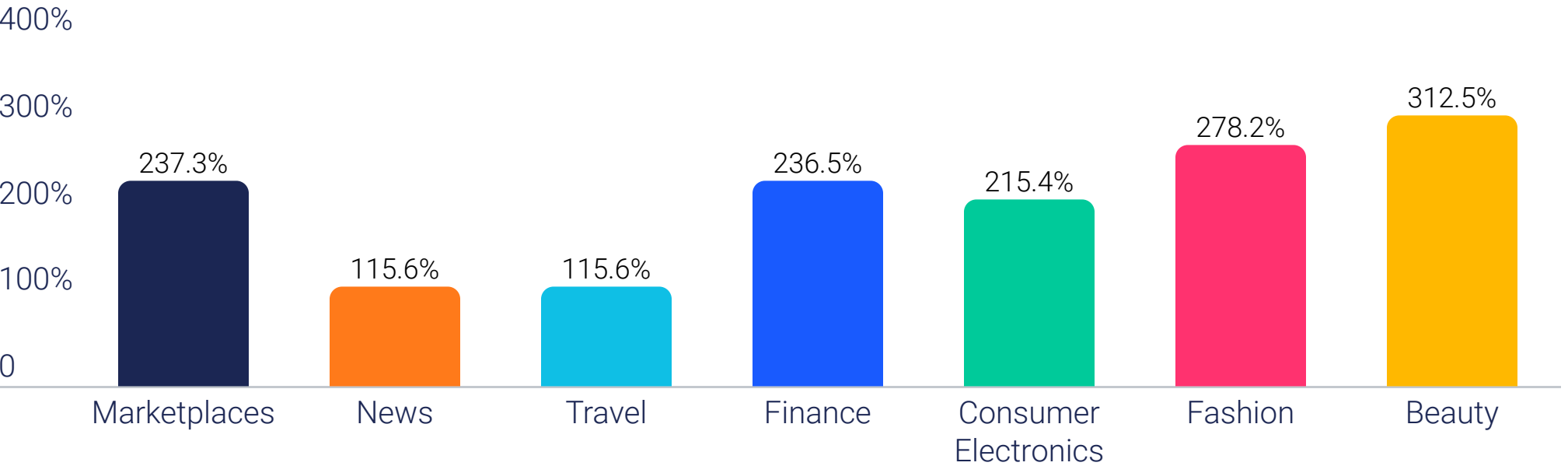
AI Referral Traffic by Category

Worldwide, Desktop and Mobile Web, Jun 2025 – May 2026



Growth in AI Referral Traffic by Category

Worldwide, Desktop and Mobile Web, Jun 2025 – May 2026 vs Jun 2024 – May 2025



Links drive traffic. Citations build trust.

"The data shows a clear disconnect between the pages ChatGPT cites and those receiving referral traffic. 65% of cited URLs sit two or three folders deep, with folder depth two alone accounting for 41.7% of citations. In contrast, 58.8% of AI referral traffic lands on homepages.

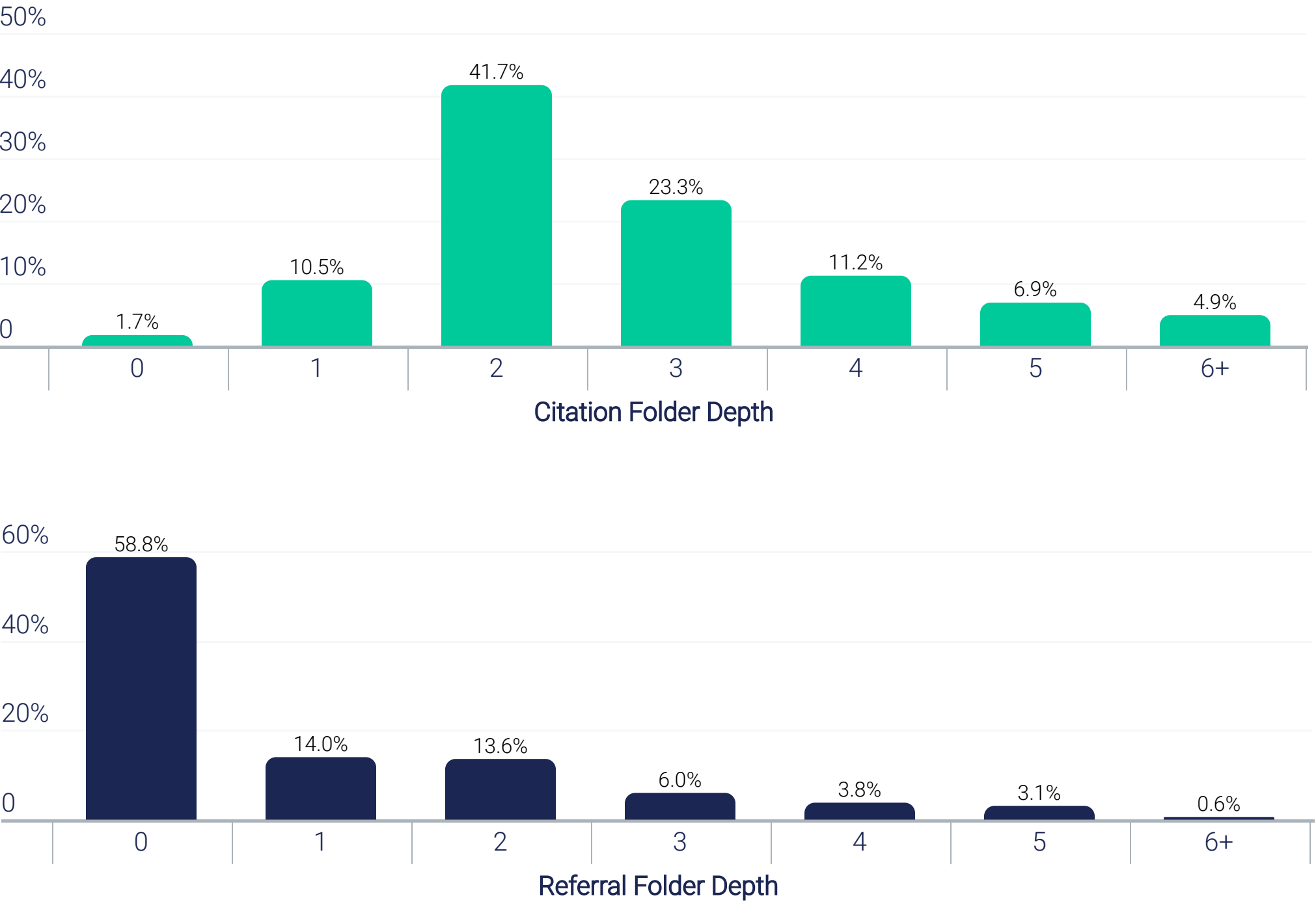
That distinction changes how AI search performance should be analyzed and optimized: Cited pages feature the content AI systems use as evidence, while traffic pages show where users enter the site. They serve different purposes and should be assessed separately: strengthen the deeper pages that influence AI answers, while ensuring the top-level pages receiving the clicks provide a relevant, persuasive and conversion-ready next step."



Aleyda Solis

Industry Expert & Founder
Orainti

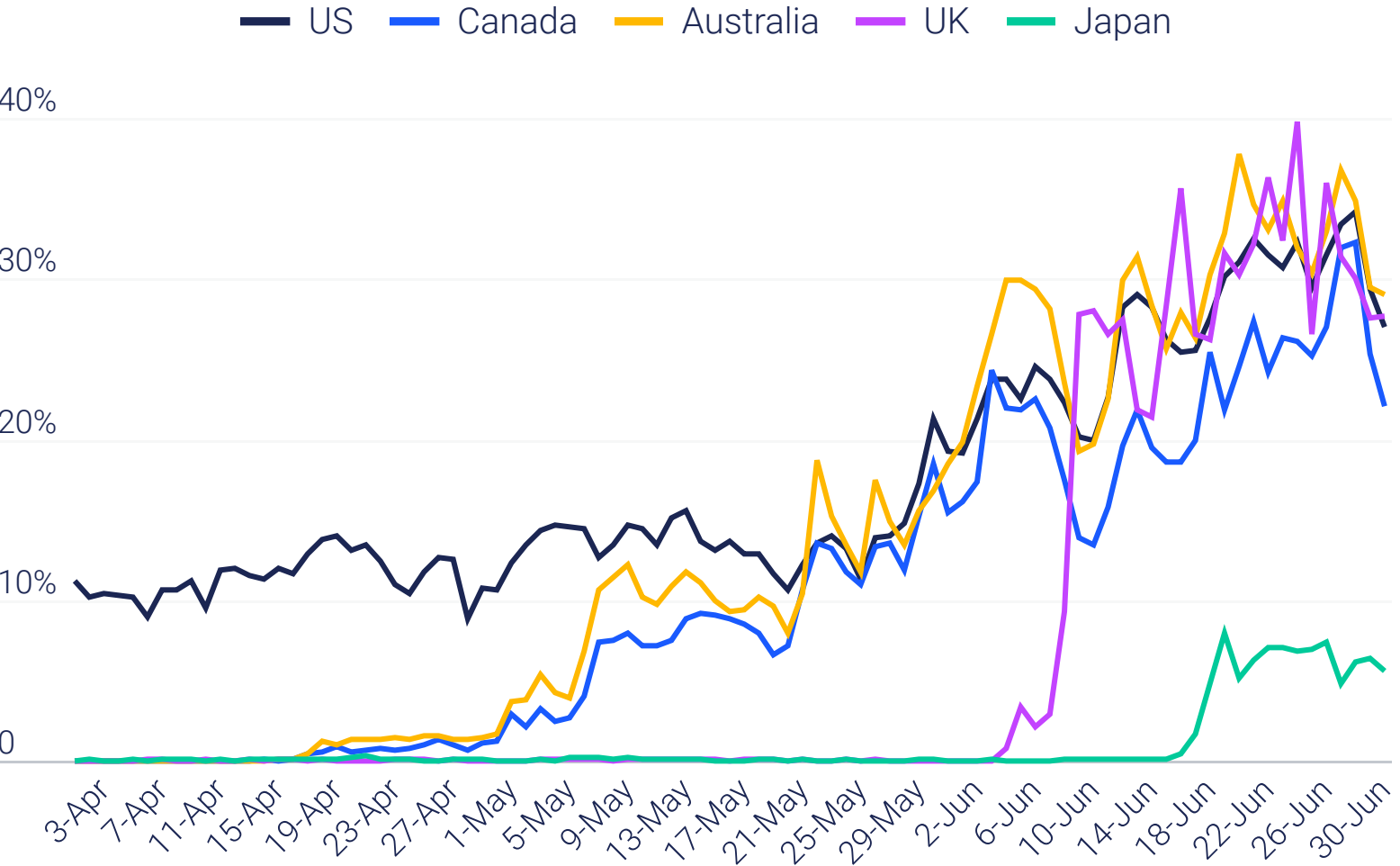
Folder Depth Distribution of ChatGPT Referral (traffic) vs Citations (URLs)
US, Desktop, May 2026



A new AI advertising ecosystem is taking shape

% of ChatGPT Conversations Containing Ads by Country

Desktop, Apr 2026–Jun 2026



Top 10 ChatGPT Advertisers

Desktop, Jun 2026



	US	Canada	Australia	UK	Japan
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

ChatGPT ads are becoming increasingly common across major markets, with the share of conversations containing ads rising steadily throughout the quarter. While rollout timing differs by country, the overall trajectory points to AI advertising becoming a standard part of the conversational experience. Early adoption is already broad, spanning ecommerce, SaaS, productivity, media and recruitment brands. As more advertisers compete for limited inventory, AI advertising is quickly evolving from an experiment into a new performance marketing channel.

Conversational ads become part of the journey

Conversational advertising is fundamentally different from traditional search and display. Nearly two-thirds of ChatGPT ads are served after the conversation is already underway, creating a new "Ad Moment" where context has begun to develop and targeting is grounded in what the user has actually said. Crucially, the conversation rarely ends when an ad appears. Nearly two-thirds of users continue engaging with ChatGPT afterwards, while click-through rates sit around 0.50%. Early evidence that this new channel is finding its footing fast.

"These early signals point to something bigger than a new ad channel: conversational advertising fits inside the user's journey instead of breaking into it. As more of that journey moves into AI conversations, this may be less a new ad format and more a preview of where discovery is heading."



Harel Amir
General Manager
Ad Intelligence, Similarweb

66.3%

% of ChatGPT ads that appear after the second prompt or later

Nearly two-thirds of ChatGPT ads appear after the second prompt or later, as the full chat context informs if and what ads appear.

65.3%

% of ChatGPT sessions that continue after an ad appears

Users continue the conversation after an ad appears, as intent to evolve beyond the initial query.

0.50%

Click-through rate of ChatGPT ads

The click-through rate of ChatGPT ads highlights that these ads do drive traffic despite being a new feature.

Looking forward



Baruch Toledano

VP, Digital Marketing Solutions, Similarweb

The biggest shift happening in digital marketing isn't simply the rise of AI Search. It's the emergence of a new era of discoverability.

Discovery is no longer tied to a single destination. Consumers are no longer relying solely on search engines to find information, they're turning to AI assistants, social platforms, shopping experiences and AI-powered products to research, compare and decide. As AI becomes embedded across the digital ecosystem, every interaction becomes a potential moment of discovery.

Just as importantly, AI adoption has entered a new phase. What was once the domain of early adopters is rapidly becoming mainstream. Over the past year, usage has broadened significantly across age groups, reflecting a technology that is becoming part of everyday consumer behaviour rather than a niche habit.

As AI continues to become expand across search, browsers, commerce, productivity tools and social platforms, the pace of change in how people discover information and make decisions will only accelerate.

For brands, the fundamentals haven't changed, in fact they matter more than ever. Building a recognised brand, earning trust, creating authoritative content and maintaining an omnichannel presence all increase discoverability. But measurement must evolve. Rankings, clicks and traffic remain important, but marketers also need to connect visibility to downstream outcomes, from branded demand and engagement to conversions and revenue.

AI accelerates the pace of tech change, but the brands that thrive will be those that stay focused on their audience: understanding where people spend time, how behaviour is changing, and adapting their marketing accordingly. Visibility is no longer about ranking in one place; it's about being discoverable wherever decisions are made.

THE TAKEAWAY?

AI Search is becoming the next major layer of digital discovery. The brands that build authority, earn visibility and measure AI performance today will define how customers discover, evaluate and choose tomorrow.

About Similarweb

Similarweb is the world's leading competitive intelligence platform, empowering businesses to win online with the most comprehensive and reliable digital data. From traffic and engagement to marketing performance and Gen AI insights, our platform uncovers opportunities, exposes competitive threats, and fuels smarter, faster growth.

Integrated into daily workflows, Similarweb delivers deep analytics across web, app, GenAI and ecommerce environments – helping brands and retailers track market share, analyze digital shelf performance, optimize strategies across every digital touchpoint, and more.

Disclaimers

Brands Covered

ChatGPT

Gemini

Claude

Perplexity

Google AI Mode

Google AI Overviews

Microsoft Copilot

Grok

DeepSeek

Meta AI

Amazon Alexa

CeraVe

Ulta

Sephora

La Roche-Posay

The Ordinary

e.l.f. Cosmetics

Maybelline

NYX Cosmetics

Paula's Choice

YSL Beauty

Revlon

Philips Norelco

L'Oréal Paris

Neutrogena

PayPal

Stripe

Chase

Fidelity

American Express

Nasdaq

TradingView

Vanguard

Capital One

Charles Schwab

Tripadvisor

Airbnb

Delta

Expedia

Marriott

Hilton

American Airlines

Southwest Airlines

Hyatt

United Airlines

Skyscanner

Kayak

Skechers

Samsung

LEGO

Tripadvisor

Vrbo

Kayak

Skyscanner

Google Flights

Couchsurfing

Hotels.com

Resume.io

Monday.com

Framer

Axon by AppLovin

Attio

BestMoney

Aikido Security

SAP

Home Depot

VistaPrint

Spotify

Figma

Canva

Glossary

Metrics

Average Monthly Visits:

The number of visits to a website each month averaged over the specified period.

Unique Visitors (UVs):

The count of distinct individuals visiting a website within a defined time period, regardless of how many times they visit.

App Sessions:

The total number of active sessions within an app, where a session begins when the app is opened and ends when it is closed or inactive for a set duration.

Monthly Active Users (MAU):

The number of unique users who engage with an app at least once during a given month.

AI Referral Volume

The total number of outbound visits (clicks) from an AI platform to external websites.

Website Affinity Index

How much more (or less) likely users of an AI platform are to visit a website category compared with Google Search users. An index of 100 equals the Google baseline.

Referral Rate:

The proportion of searches / queries that result in an outbound referral.

Citations:

AI-generated responses that include one or more links to external websites.

Brand Visibility:

The share of AI-generated responses within a category that mention a specific brand.

Query Length:

The average number of words contained in user search queries or AI prompts.

Queries/Prompts per Session:

The average number of search queries or prompts submitted during a single session.

Homepage Referral Share:

The percentage of AI-generated referrals that land on a website's homepage rather than a deeper internal page.

ChatGPT Ad Penetration

The percentage of ChatGPT responses that include at least one sponsored result.

About the authors



Laurie Naspe
Director, Market Insights
at Similarweb

With over 20 years in the commercial application of consumer and behavioural data, Laurie uses insights to help brands drive revenue. She has held leadership roles within the Media, Adtech and Market Research sectors, including at Spotify, LinkedIn, Quantcast and Forrester Research.

At Similarweb, Laurie leads the Market Insights team which helps deepen customer engagement with Similarweb data through the creation of inspiring and actionable insights-led narratives.



Sam Sheridan
Data Analyst, Market Insights
at Similarweb

With a background in data science and previous experience within the Retail and CPG sectors, Sam uses his technical skills to extract and transform complex data into clear, actionable narratives.

At Similarweb, he specialises in uncovering digital trends and delivering impactful stories that guide business decisions across industries.

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How Similarweb helps you compete in the new digital landscape?



Benchmark your visibility and traffic in Gen AI and every marketing channel



Understand the search landscape with metrics like zero clicks and search demand



Analyze your competitors and market to find new growth opportunities



All insights were prepared using Similarweb data

To learn more about how you can gain custom data and insights to build a competitive edge for your business in the era of Gen AI, book a one-on-one demo with one of our market insights experts.

[Book a live demo now >](#)

