Sensor Tower

State of Web 2026

Discover the latest trends on web, across desktop and mobile

Executive Summary | Key Takeaways

01

AI Is Rapidly Reshaping the Web and Changing How Consumers Make Decisions

AI assistants were the fastest-growing web category in 2025 (+86% traffic, +101% time spent), and ChatGPT became the #6 most visited website globally. Gen AI is also shifting from simple information retrieval to guiding consumer decisions, such as Amazon Rufus users converting at nearly 2x the rate of non-users and travel users increasingly rely on AI for trip planning.

02

Web is Concentrated Around a Few Gatekeepers Even as AI Surges

Browsers/Search and Social together account for ~2.4 trillion visits, serving as the internet's primary gateways. Google and Meta continue to dominate both traffic and engagement across web and mobile, and social platforms lead the way in cross-platform discovery, from streaming to AI assistants.

03

Mobile is Winning the Traffic War, but Desktop Still Owns Engagement

While mobile surpassed 50% of global web visits for the first time in Q1 2026, desktop still accounts for over 70% of web time spent. Users increasingly browse on mobile but complete deeper engagement on desktop. Meanwhile, AI assistants are beginning to bridge this divide through cross-platform behavior.

04

AI Discovery Is Emerging as a New Traffic Channel But Search Still Dominates

Gen AI referrals are growing rapidly but still account for only 0.7% of overall traffic and are more concentrated in production-focused verticals like Software and Education. Meanwhile, Organic Search still drives significantly more traffic (~17% of web visits globally). Given the rising role of Gen AI in future discovery, leaders are now optimizing for "AI visibility" similarly to SEO.

Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business

UBISOFT	LARIAN STUDIOS	Google	EA	Smilegate	Disney
petco	HERSHEY'S	amazon	ROVIO	DOORDASH	depop
Walmart	chewy	Microsoft	SEGA	Coca-Cola	SONY
fetch REWARDS	Pizza Hut	Meta	OUTFIT7	Gett.	ByteDance
Alibaba	Zillow	Tencent 腾讯	WARNER BROS. GAMES	P&G	NBA
CVS Health	Aream & Co.	kenvue		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

Executive Summary | Web Landscape at a Glance in 2025

Total Web Visits

8.0

Trillion

YoY Growth

-1.8%

Desktop & Mobile across 56 markets

15.2 million visits per minute in 2025

Total Time Spent

1.6

Trillion Hours

YoY Growth

-4.9%

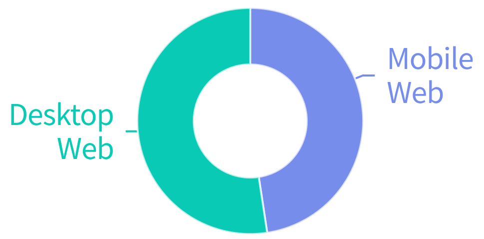
Desktop & Mobile across 56 markets

4.4 billion hours each day in 2025

Mobile Share of Visits

47.6

Percent



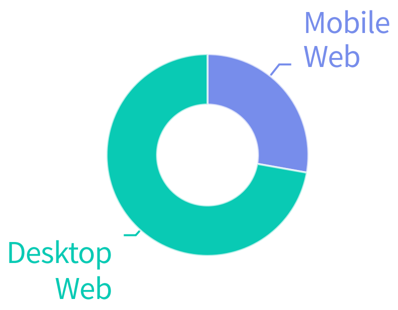
Mobile share vs. desktop across 56 markets

+2.3 percent points vs. 2024

Mobile Share of Time Spent

27.8

Percent



Mobile share vs. desktop across 56 markets

+2.4 percentage points vs. 2024

Time Spent on AI Assistant Websites

67.8

Billion Hours

+101%

YoY Growth

Desktop & Mobile across 56 markets

210 billion visits in 2025

Table of Contents

About this Data:
Web Methodology

The web visits and unique visitor estimates presented in this report were compiled by Sensor Tower's Market Insights team using Sensor Tower Web Insights platform.

Sensor Tower's Web Insights data channels include Desktop Web and Mobile Web (phone and tablet).

A visit captures all activity on a site within a 30-minute window. When a user accesses one or more pages on a site, all subsequent page views within the next 30 minutes are counted as part of the same visit. After 30+ minutes of inactivity, the next activity starts a new visit.

Unique visitors counts the distinct individuals who visited a website during a specific time period. Each visitor is counted only once regardless of how many times they return.

Total visits captures the total number of times any visitor accessed the website during a specific time period, including repeat visits from the same visitor.

True audience is the measure of how many unique visitors are driving traffic to a brand across multiple devices. It is defined by deduplicating the user base of a brand’s app active users, mobile web visitors, and desktop web visitors.

Sensor Tower

Interested in our Digital Market Insights Solutions?

If you want to learn more about Sensor Tower, please request a demo:

Request a free demo!

Get the latest insights on our blog: **sensortower.com/blog**

Web Usage Overview

Web Usage Ticked Down Slightly in 2025

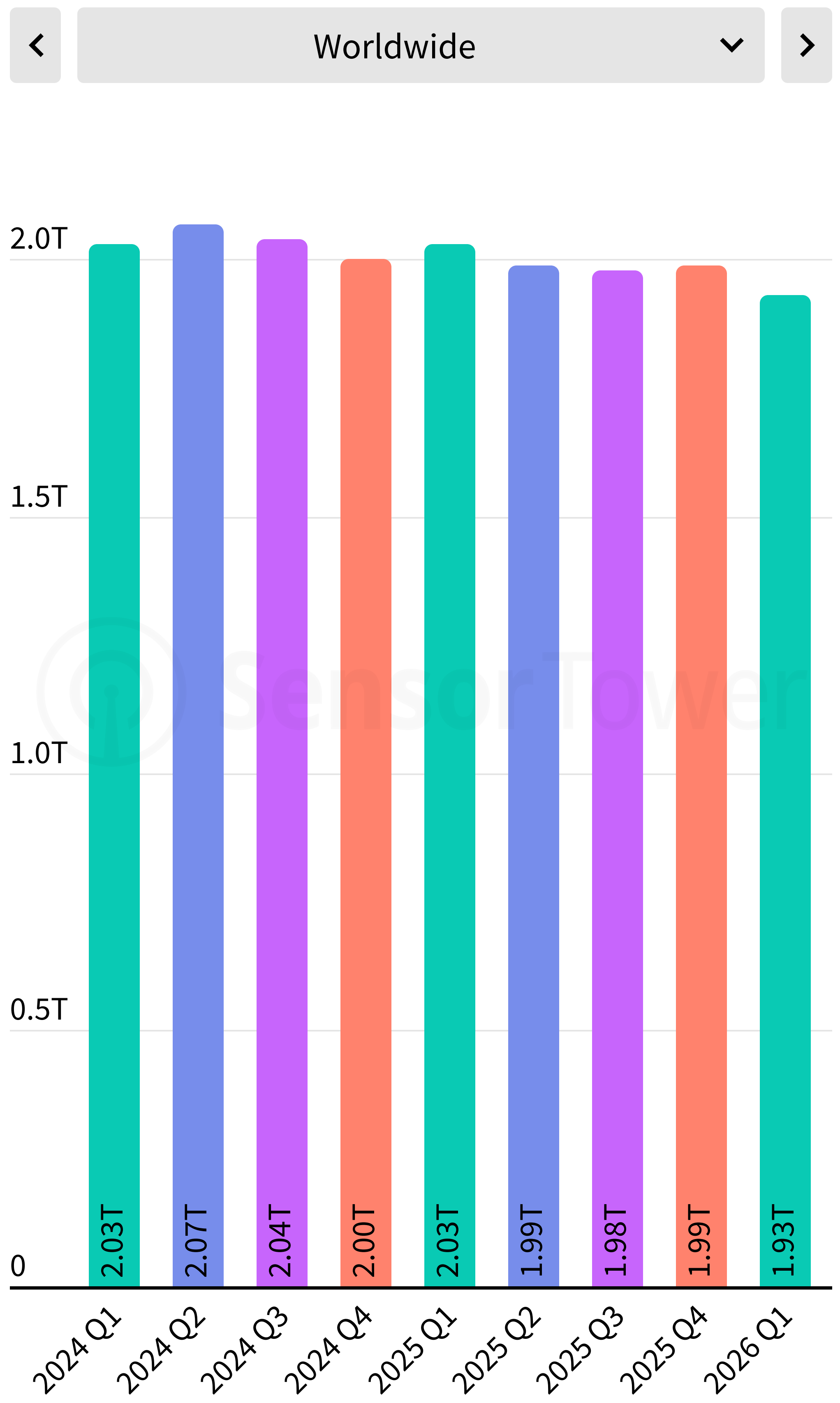
Total web visits, including desktop and mobile across 56 markets, hovered around 8 billion in 2025, marking a modest 1.8% year-over-year (YoY) decline. Time spent fell more sharply, dropping nearly 5% YoY to 1.6 trillion hours.

As in-person activity continues to rebound post-pandemic, and as mobile apps capture a growing share of digital attention, web time spent is likely to continue drifting downward across several key markets, including the US, Japan, and Western Europe.

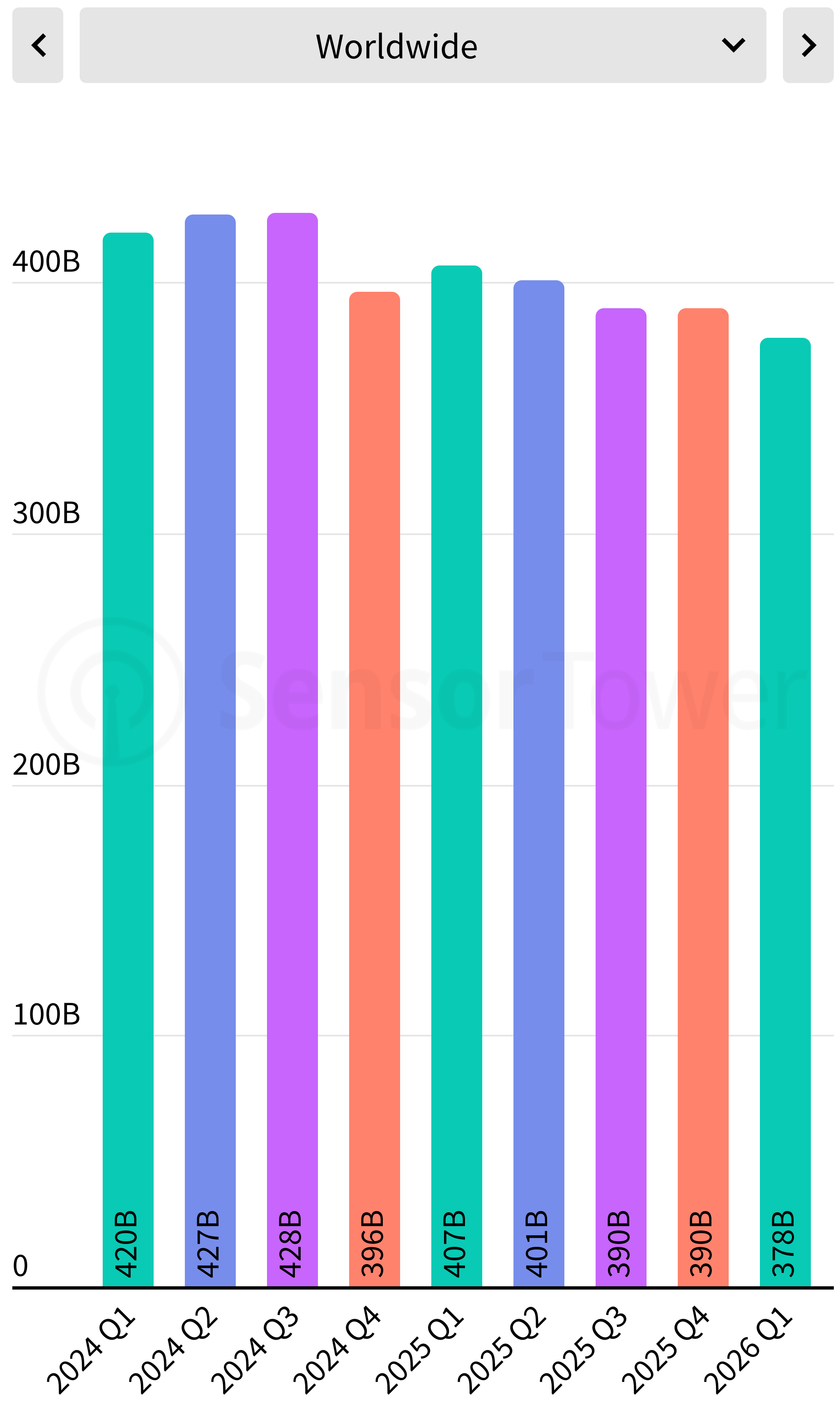
India and Vietnam stood out as the only major markets to see YoY growth in both visits and time spent in 2025. India led with a 7% increase in sessions, while Vietnam recorded the fastest growth in time spent (+6.3% YoY). Other markets, including Brazil, Indonesia, and South Korea, saw relatively flat web traffic.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

Quarterly Web Visits by Market



Quarterly Web Time Spent (Hours) by Market

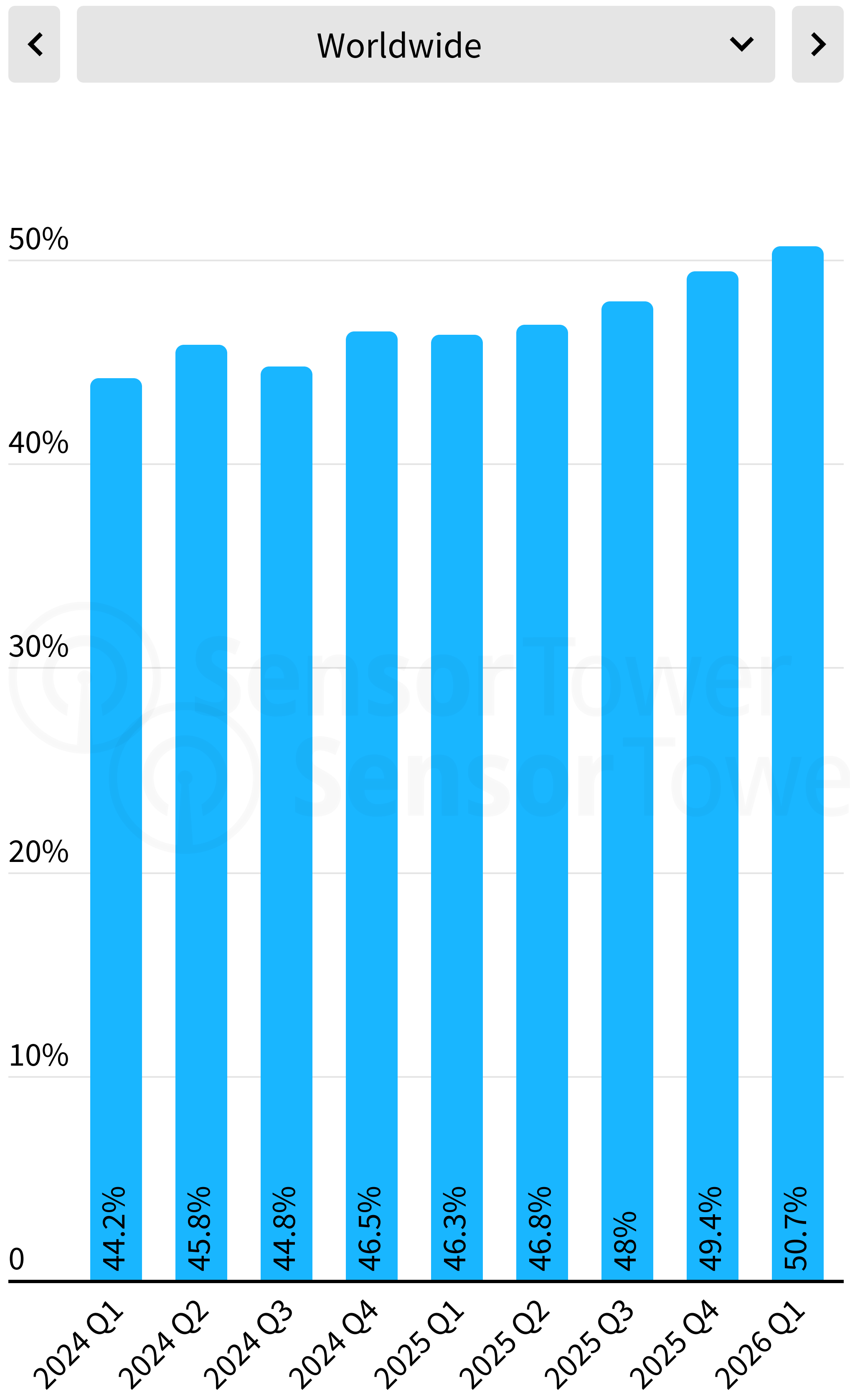


Mobile Now Accounts for More Than Half of All Web Traffic

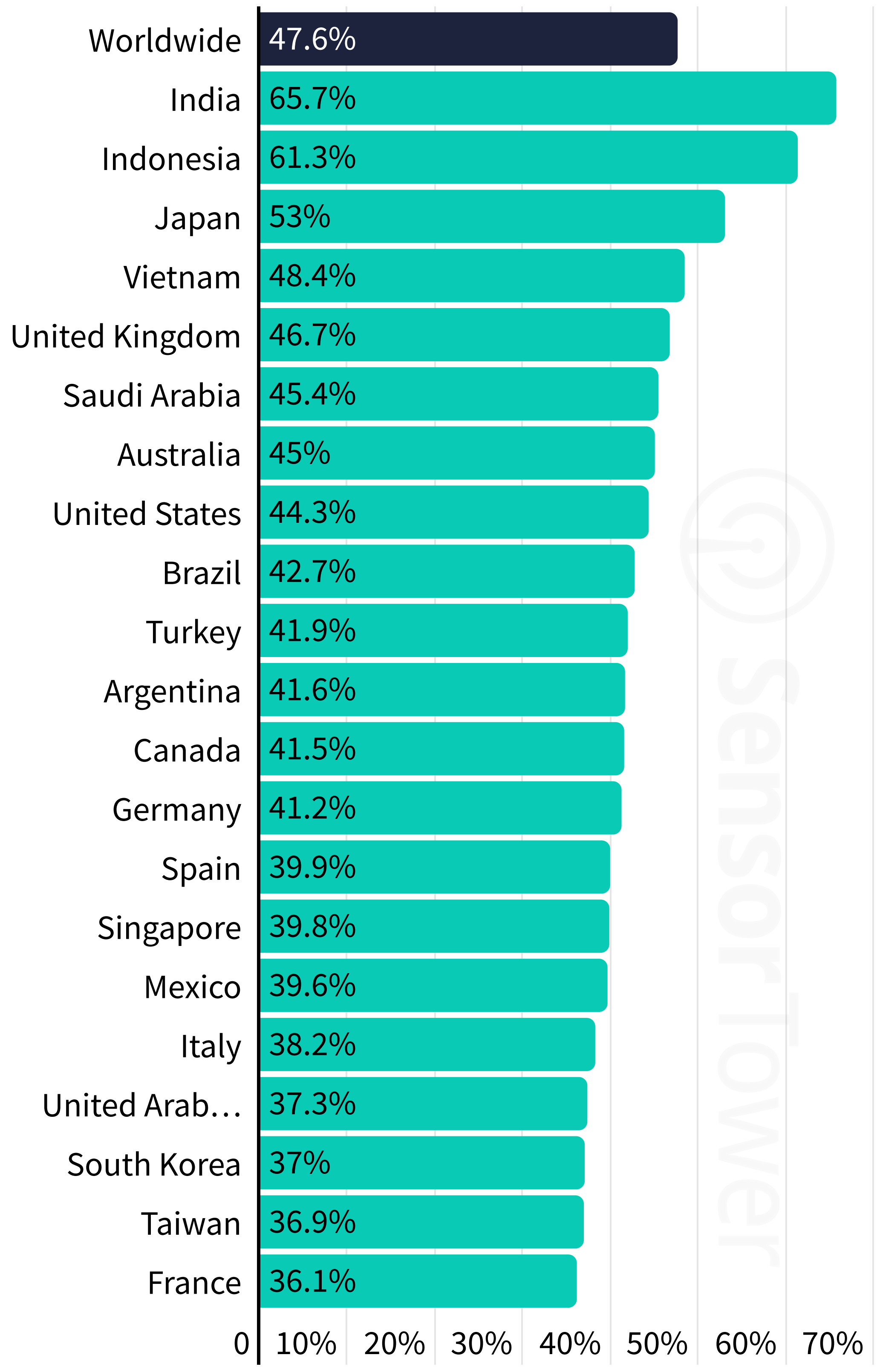
In Q1 2026, mobile devices accounted for more than half of all web visits, continuing a steady upward trend from 44% in Q1 2024 (vs. 56% for desktop). Despite this shift, desktop still dominates time spent, accounting for more than 70% of total web usage, as users tend to favor desktop for longer sessions.

The growing share of mobile traffic is driven by two key factors: increased activity in mobile-first markets such as India and Indonesia, and a rising mobile share relative to desktop across most markets, including the United States. Some of the fastest gains in mobile share have come from markets such as France, Germany, Singapore, and the UAE.

Quarterly Share of Visits on Mobile (vs. Web) by Market



Share of Visits on Mobile (vs. Web) in 2025 by Market



Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

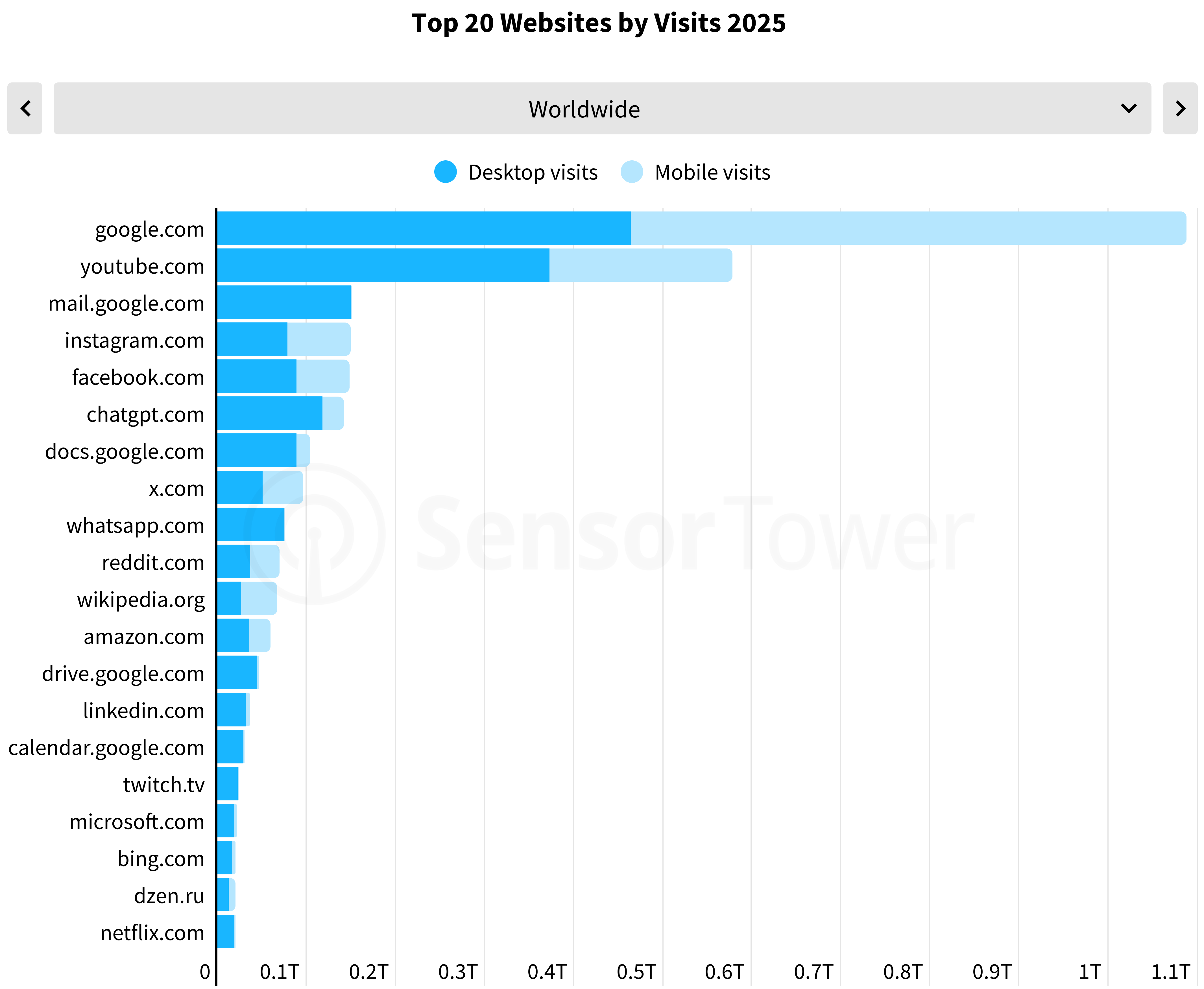
Google and YouTube Secure Unrivaled Share of Global Web Traffic

Alphabet commands a dominant share of global web traffic, with Google.com and YouTube.com consistently ranking #1 and #2, respectively. Together, they generated more than 1.6 trillion visits in 2025.

Google.com's traffic is relatively balanced across devices, serving as the go-to platform for quick searches on mobile while remaining the default research tool on desktop. In contrast, YouTube's web traffic skews heavily toward desktop, as users favor larger screens for long-form content and immersive viewing (or turn to the YouTube app on mobile).

Social media platforms maintain a more balanced web presence, acting as a bridge between mobile discovery and desktop engagement. While native apps capture the majority of deep engagement, web versions of platforms like Instagram and X see near-even distribution across devices, enabling users to move seamlessly between quick mobile sessions and longer desktop browsing.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.



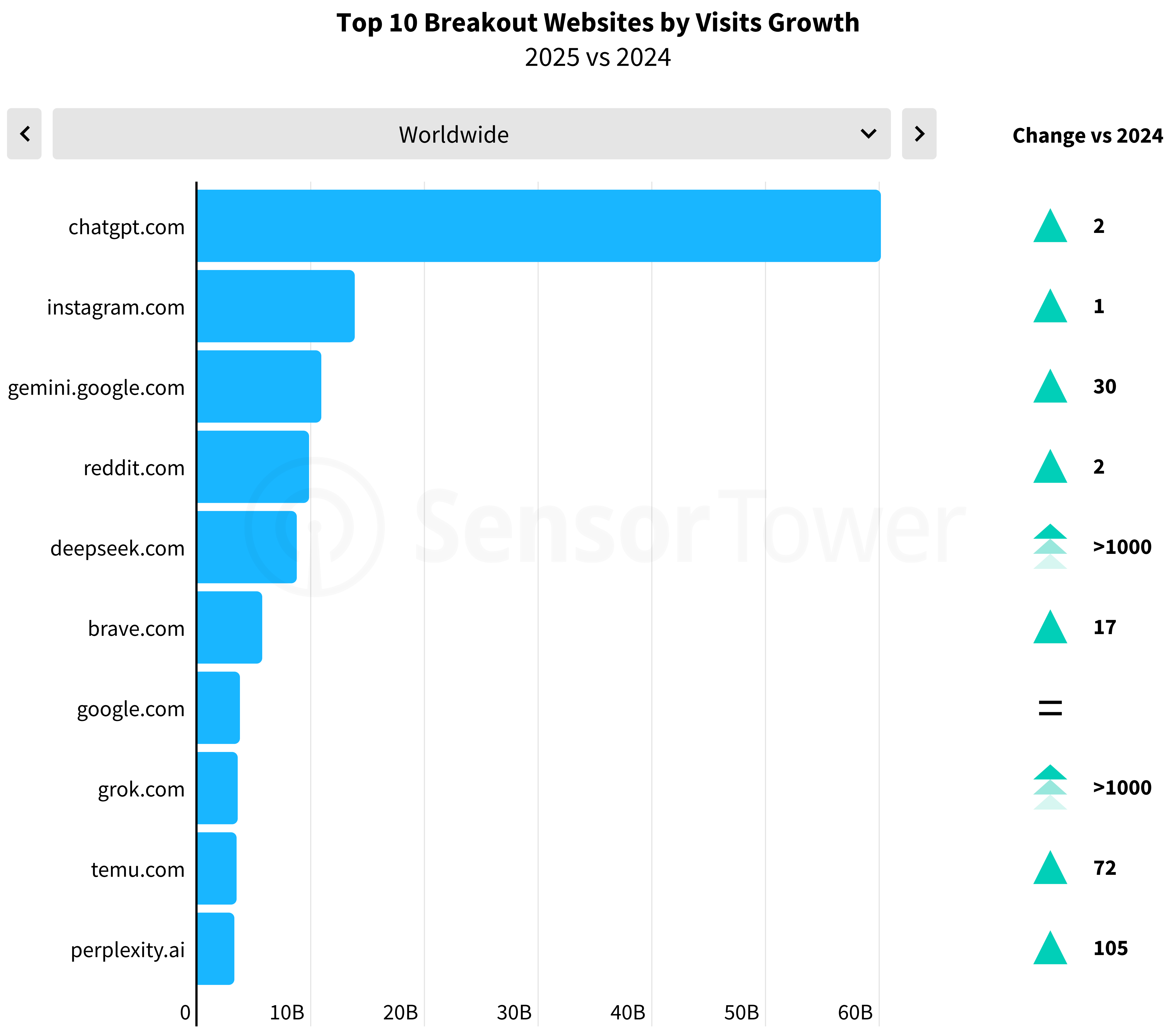
ChatGPT Leads Breakout Rankings with 60 Billion YoY Visit Growth

Generative AI remains the primary driver of web growth, led by ChatGPT.com, which saw a staggering 60 billion visit increase YoY, becoming the #6 most visited website. This momentum is shared by emerging AI players such as Gemini, DeepSeek, Grok, and Perplexity, all of which rank among the top 10 breakouts.

While Generative AI leads the overall growth trend, Reddit has emerged as the top breakout platform by shifting its focus to web users. Globally, Reddit's mobile app monthly active users (MAU) climbed only 6.5% YoY in 2025 while its unique web users soared 13.7% over this same period. Sensor Tower's true audience metric, measuring the unique visitors across web and mobile, reveals that more than 70% of Reddit's users are web-only users, compared to 14.5% using only the app in 2025. Approximately 15% of Reddit users visited on both app and web.

Discover True Reach Across Devices
Sensor Tower's True Audience metric reveals the hidden scale of digital presence across mobile apps and browsers.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.



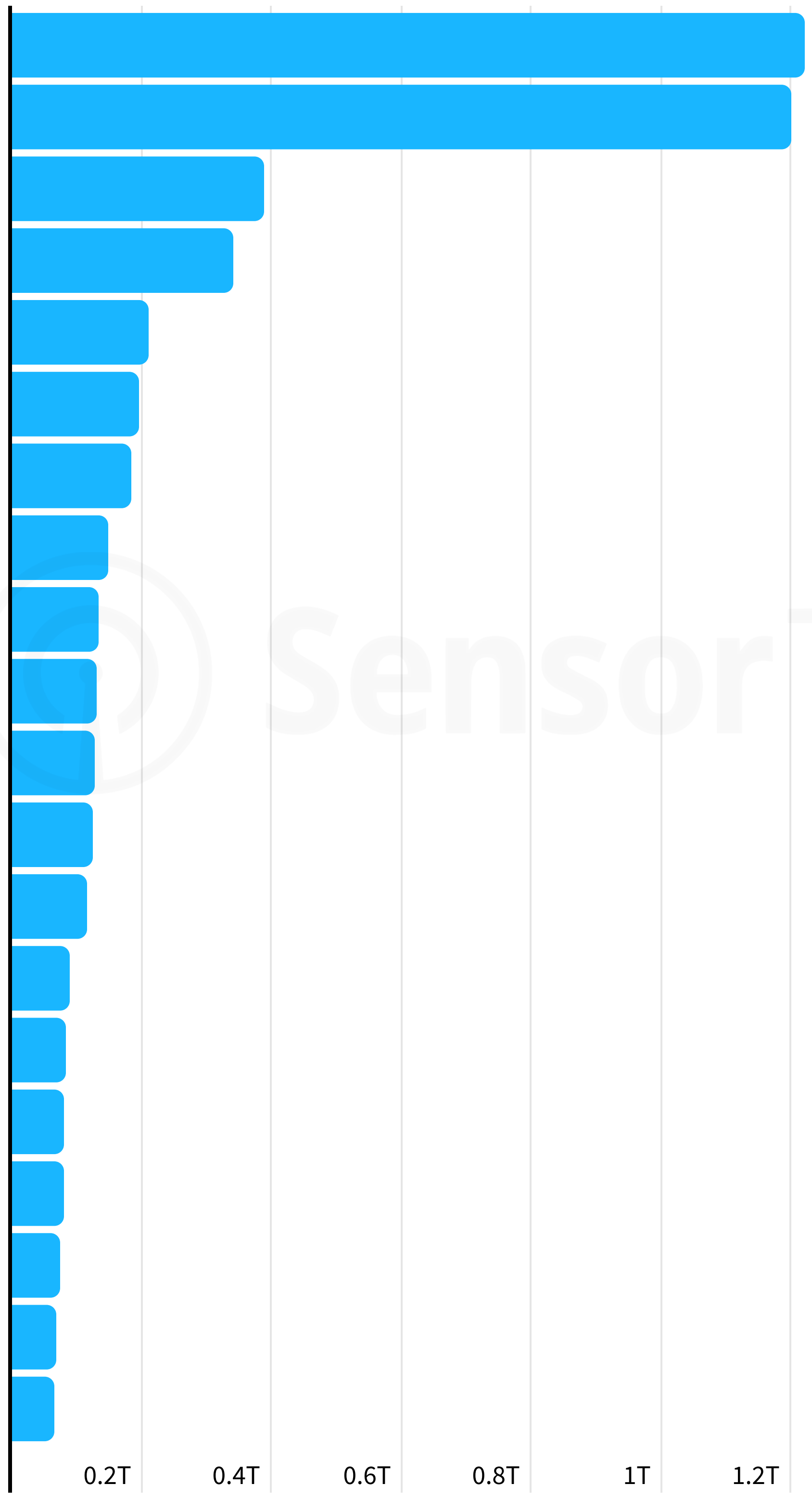
The Rise of AI Assistants is Reshaping the Global Web Traffic Landscape

Browsers & Search Engines remain the largest force in the web landscape, commanding 1.22 trillion visits globally in 2025. Social Media follows closely as the second-largest pillar of traffic with 1.20 trillion visits, highlighting a highly consolidated digital environment where these two categories act as the primary gateways for the vast majority of online entry points.

The AI Assistant genre emerged as the fastest-growing category of 2025, with a staggering 86% explosion in traffic. Category leaders ChatGPT and Gemini saw robust growth of 73% and 142%, respectively. The impact of this growth is most visible in the softening of traditional informational sectors; while Search and Social traffic remains flat, the 7% decline in Education & Training and 6% decline in News visits signal a behavioral migration toward AI-driven synthesis.

Top 20 Web Subgenres by Total Visits in 2025

Worldwide



Subgenre	YoY Growth	#1 Website in the Subgenre
Software | Browsers & Search Engines	0%	google.com
Media & Entertainment | Social Media	0%	youtube.com
Jobs & Education | Education &…	-7%	pw.live
Media & Entertainment | News	-6%	yahoo.com
Software | AI Assistant	86%	chatgpt.com
Software | Email	-7%	mail.google.com
Shopping | Shopping	3%	amazon.com
Media & Entertainment | Blogs	-15%	wikipedia.org
Software | Office Suites	0%	docs.google.com
Software | Business & Productivity…	-1%	atlassian.com
Media & Entertainment | Books &…	7%	archiveofourown.org
Law & Government | Government…	4%	nih.gov
Media & Entertainment | Social…	-4%	whatsapp.com
Software | Utilities	-4%	stayfocusd.com
Media & Entertainment | Sports…	-1%	cricbuzz.com
Media & Entertainment | OTT…	-6%	netflix.com
Software | Cloud Storage	-2%	drive.google.com
Jobs & Education | Jobs & Careers	-5%	linkedin.com
Media & Entertainment | Media &…	-5%	fandom.com
Software | Software	-2%	microsoft.com

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

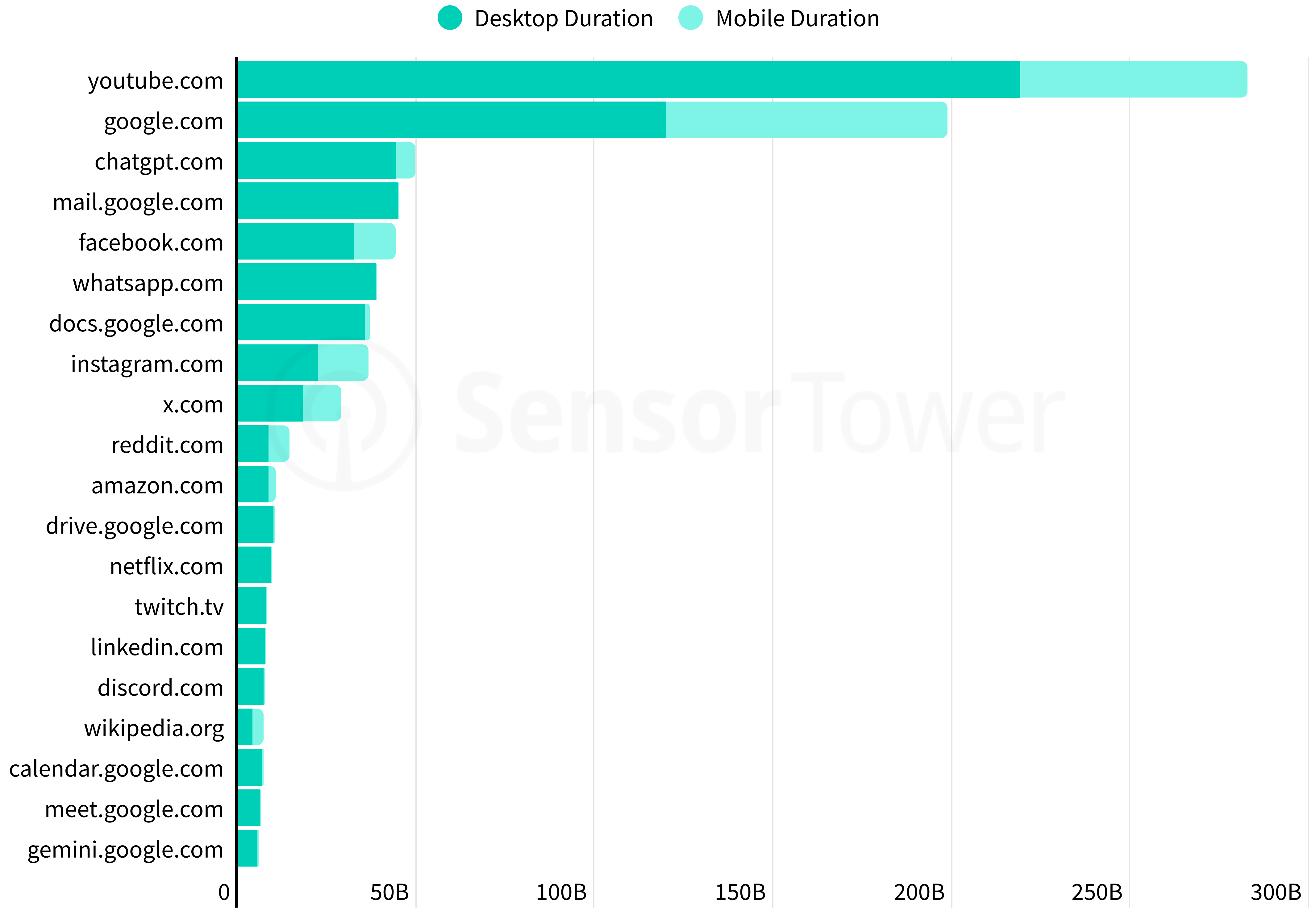
Google Properties Account for the Majority of Global Web Time

Google continues to define the global web experience, with YouTube and Google Search securing the top two positions worldwide, capturing 283 billion and 199 billion hours in 2025, respectively. The ecosystem's stickiness is further reinforced by productivity anchors like Gmail (#4) and Google Docs (#7), which command significant duration in the top 10 global websites.

While global rankings are typically dominated by traditional social giants, Reddit maintains a uniquely strong position in the US market. Ranking as the #5 most engaging website with 6.6 billion hours spent in 2025, its web browser engagement in the US is higher than that of Facebook, Instagram, and X. On mobile, however, Meta and TikTok are dominant in the US, with the Instagram, TikTok, and Facebook apps each achieving for more than 5 times the time spent compared to Reddit or X.

Top 20 Websites by Total Time Spent (Hours) in 2025

Worldwide



Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

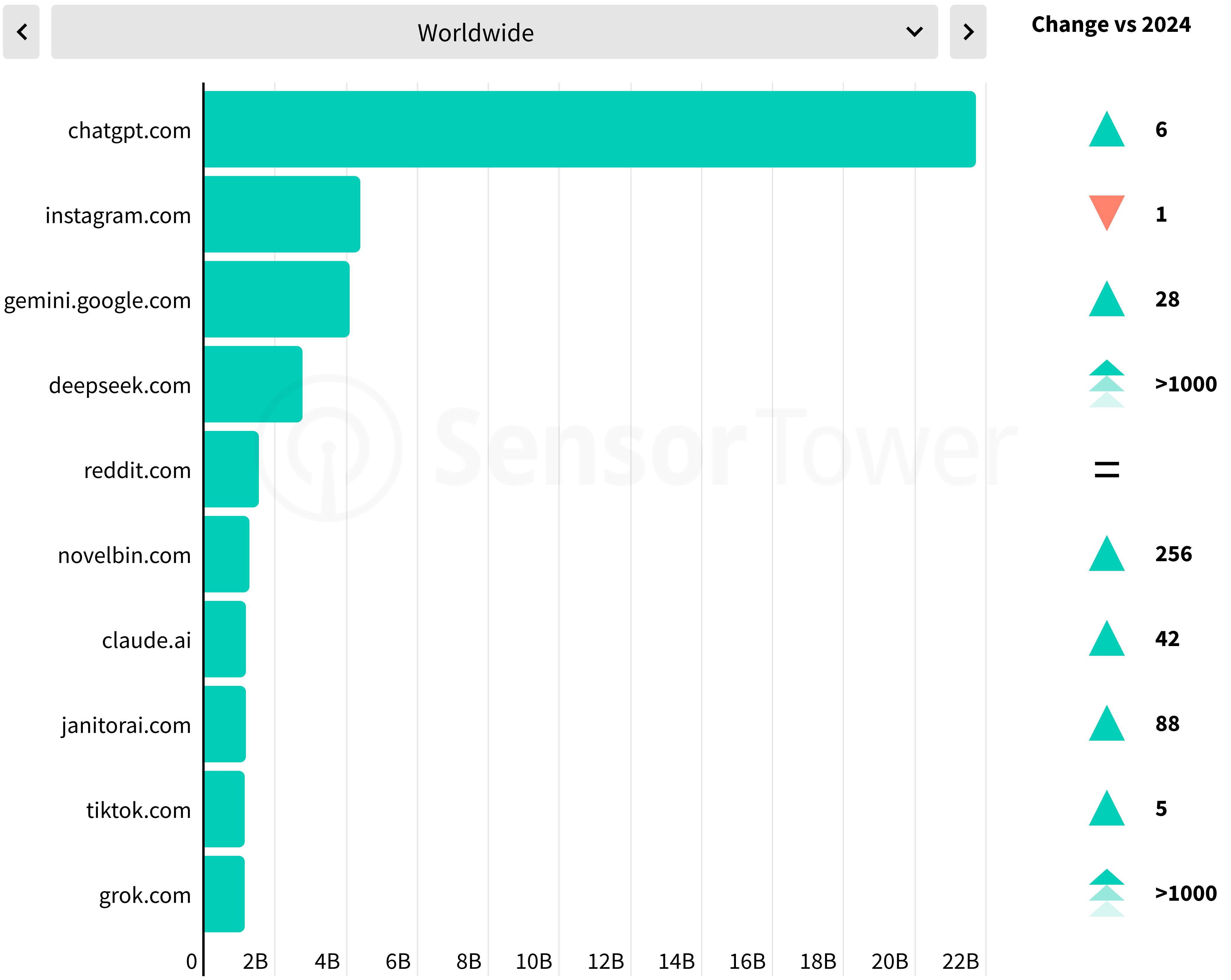
Gemini Breaks Into Global Top 20 Leaderboards by Time Spent

Generative AI did more than just win the traffic war; it rapidly captured global user attention throughout 2025. ChatGPT led all global breakouts with a massive 21.7 billion hour increase in time spent in 2025, solidifying its position as the #3 website worldwide by total duration.

This momentum is shared across the sector, with Gemini, DeepSeek, Claude, and Grok all appearing in the global top 10 breakouts for duration growth. As these emerging players scale, they are climbing the global leaderboards for total time spent: Gemini has entered the top 20 website rankings worldwide for the first time (#20), followed by Claude (#43), DeepSeek (#71), and Grok (#96).

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

Top 10 Breakout Websites by Total Time Spent (Hours) Growth
2025 vs 2024



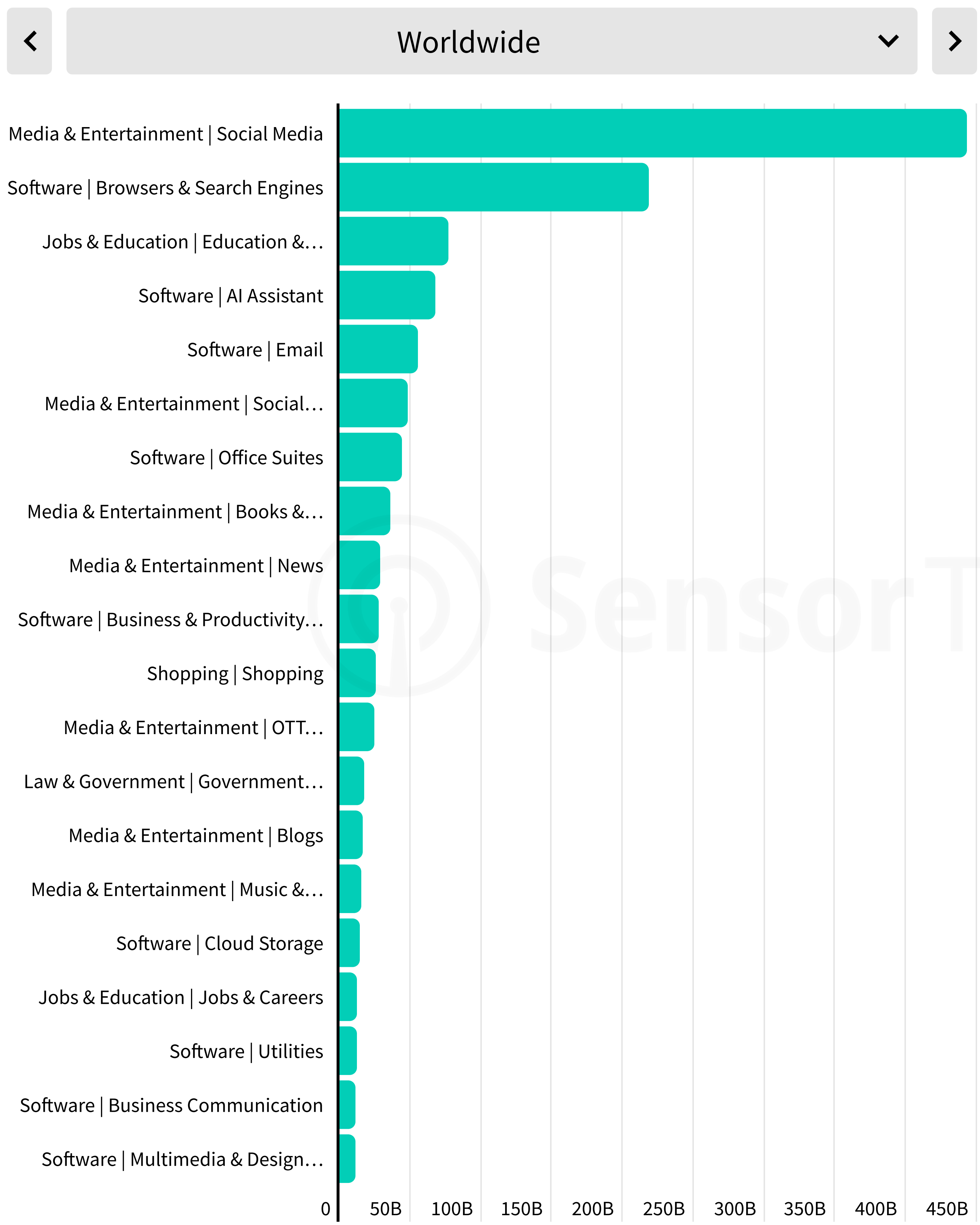
AI Assistants Double Usage to Enter the Top 5 Web Subgenres

While the majority of social media engagement has migrated to mobile apps, Social Media remains the leading web subgenre by total time spent. In 2025, web users spent nearly 443 billion hours on social media across desktop and mobile web. Its sheer volume is more than double that of Browsers & Search Engines (218 billion hours), which solidifies its status as the primary horizontal layer of the open web.

AI Assistant is the standout trend of the year. While nearly every major web subgenre saw a decline in time spent, including Browsers & Search Engines (-7%), Education & Jobs (-13%) and Email (-16%), AI Assistants experienced explosive +101% YoY growth, ranking as a top 5 subgenre in 2025.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile.
Worldwide includes 56 available markets.

Top 20 Web Subgenres by Total Time Spent (Hours) in 2025



Subgenre	YoY Growth	#1 Website in the Subgenre
Media & Entertainment | Social Media	-1%	youtube.com
Software | Browsers & Search Engines	-7%	google.com
Jobs & Education | Education &…	-13%	pw.live
Software | AI Assistant	101%	chatgpt.com
Software | Email	-16%	mail.google.com
Media & Entertainment | Social…	-7%	whatsapp.com
Software | Office Suites	-10%	docs.google.com
Media & Entertainment | Books &…	13%	archiveofourown.org
Media & Entertainment | News	-14%	livedoor.com
Software | Business & Productivity…	-8%	salesforce.com
Shopping | Shopping	-3%	amazon.com
Media & Entertainment | OTT…	-16%	netflix.com
Law & Government | Government…	-2%	eci.gov.in
Media & Entertainment | Blogs	-19%	wikipedia.org
Media & Entertainment | Music &…	0%	spotify.com
Software | Cloud Storage	-7%	drive.google.com
Jobs & Education | Jobs & Careers	-10%	linkedin.com
Software | Utilities	-16%	stayfocusd.com
Software | Business Communication	-10%	meet.google.com
Software | Multimedia & Design…	-1%	canva.com

Acquisition: How Users Discover & Enter

Organic Search Remains a Far Larger Traffic Source Than Gen AI

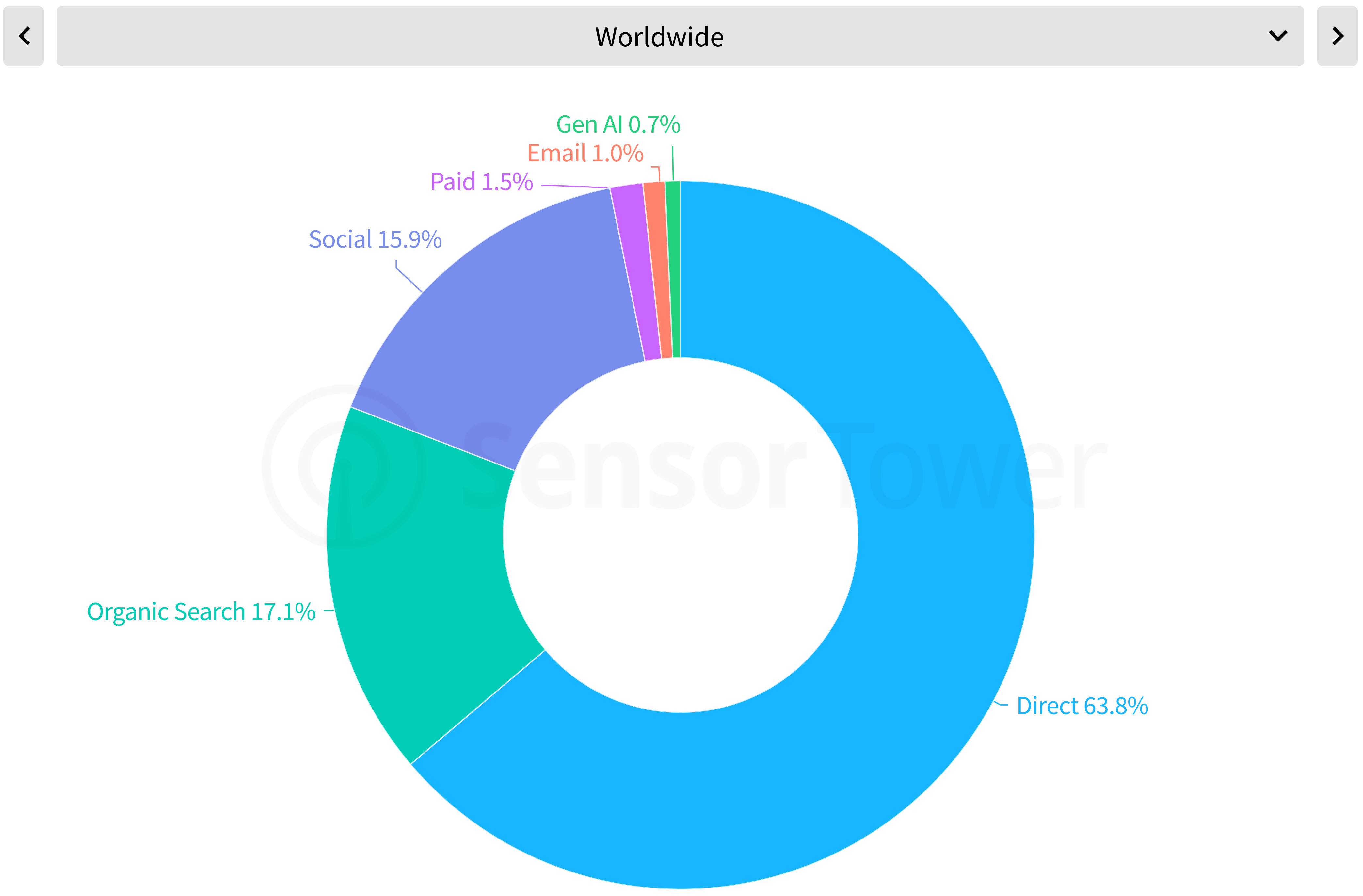
Direct traffic remains the dominant source of web visits across desktop and mobile, accounting for nearly 64% of total traffic. Organic Search (17%) and Social (16%) make up most of the remainder, while all other channels combined contribute roughly 3% of visits.

Although Gen AI referral traffic is growing rapidly, it still represents a relatively small share of overall web traffic, accounting for just 0.7% of total visits across most websites.

The US stands out for its comparatively larger Paid and Email traffic channels, with each accounting for roughly 2% of visits as brands invest heavily to reach high-spending consumers. The UK was the only other major market to show similarly elevated shares from these sources.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile. Worldwide includes 56 available markets. Includes sites with at least 10,000 visits in the market in a month.

Website Visit Traffic by Channel, Q1 2026



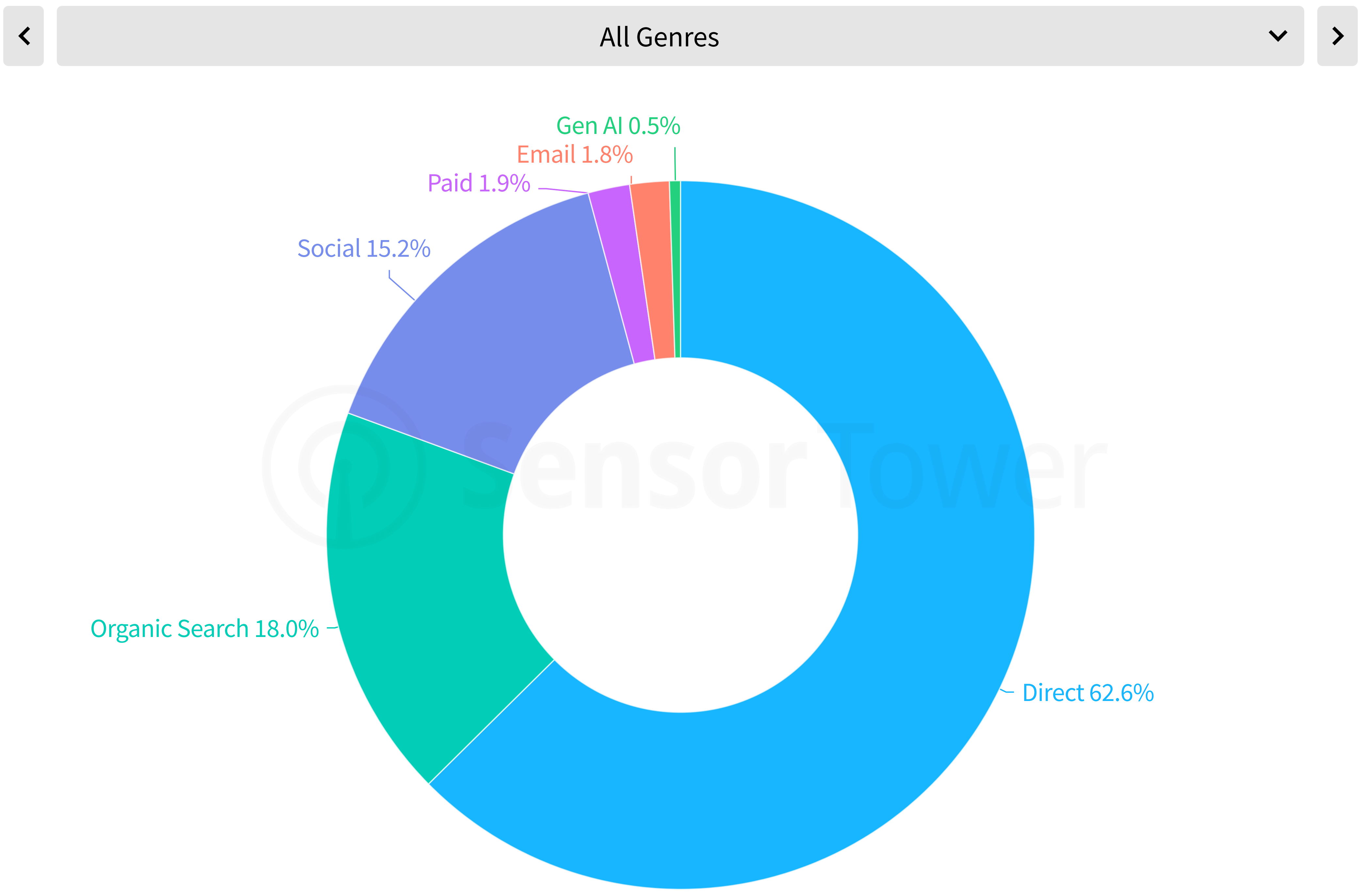
Gen AI Traffic Is Highest for Productivity-Focused Genres in the US

In the United States, traffic source mix varies significantly by vertical. Retail and travel-related categories such as Consumer Packaged Goods, Shopping, Experiences & Events, Auto, and Travel & Tourism, derive the highest share of traffic from paid channels. Meanwhile, Jobs & Education, Advertising & Marketing, and Financial Services rely more heavily on social traffic, while Real Estate, Political, and Auto websites see the strongest contribution from email.

Although the Gen AI ecosystem is still evolving rapidly, productivity and business-oriented categories currently derive the greatest share of traffic from AI referrals. Excluding AI Assistant platforms themselves, Law & Government, Non-profit, Jobs & Education, and Software recorded the highest Gen AI traffic share, ranging from 0.9% to 1.3% of total visits.

Source: Sensor Tower Web Insights
Note: Web visits and time spent across desktop and mobile. Worldwide includes 56 available markets. Includes sites with at least 10,000 visits in the market in a month.

Website Visit Traffic by Channel in the US, Q1 2026



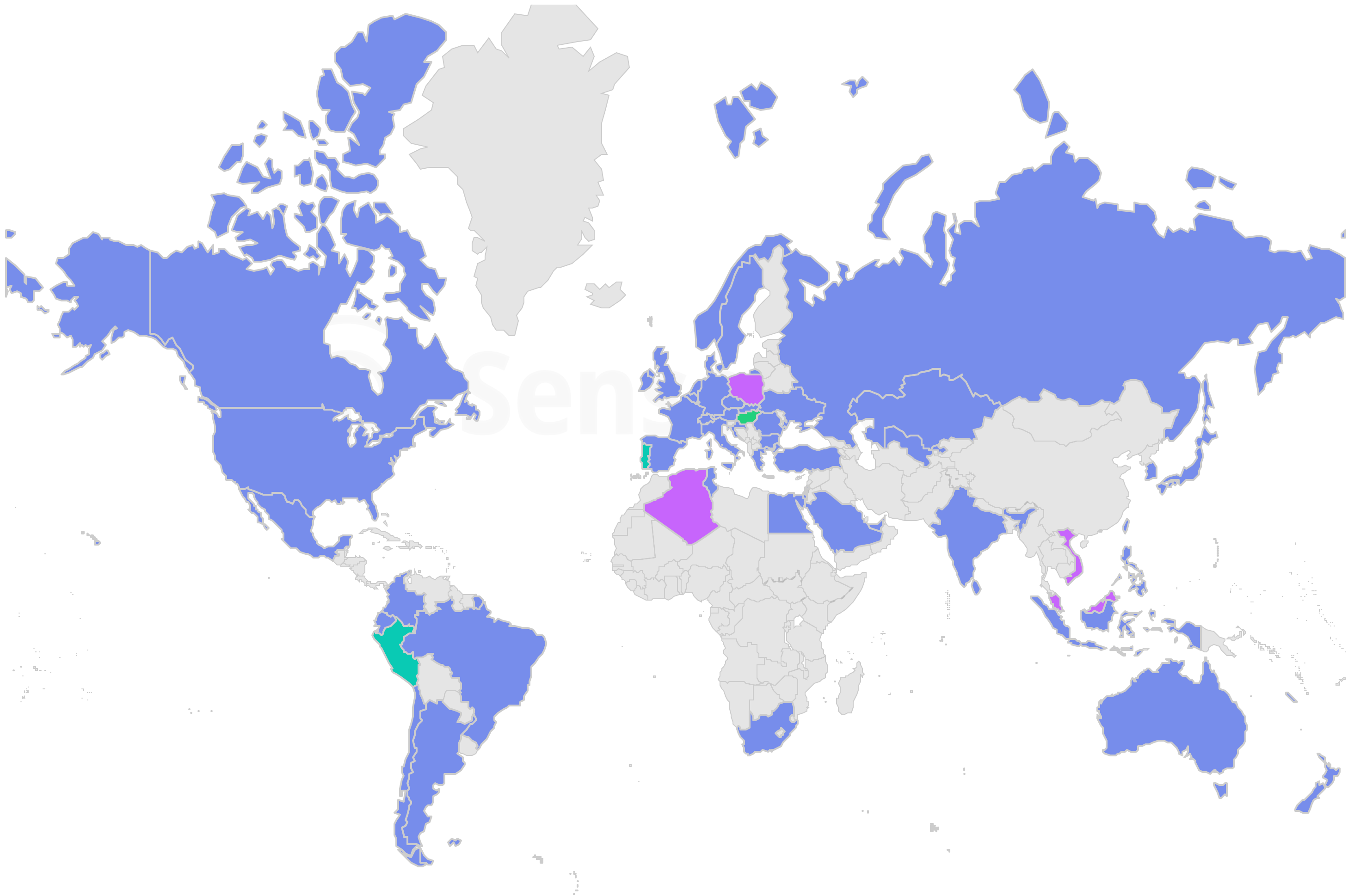
General Shopping is Outpacing Other Genres in Gen AI Traffic

While Shopping remains the dominant global use case, ranking No. 1 by Gen AI referral volume in most regions, distinct cultural shifts are appearing. In Indonesia, Philippines, Vietnam, and South Korea, the rise of Books & Comics as the leading growth genre is driven by platforms such as Scribd and Wiley. This signals a growing trend of users leveraging AI to navigate academic resources, digital libraries, and professional publications, rather than just casual entertainment.

Top Gen AI Referral Genres by Region

Q1 2026

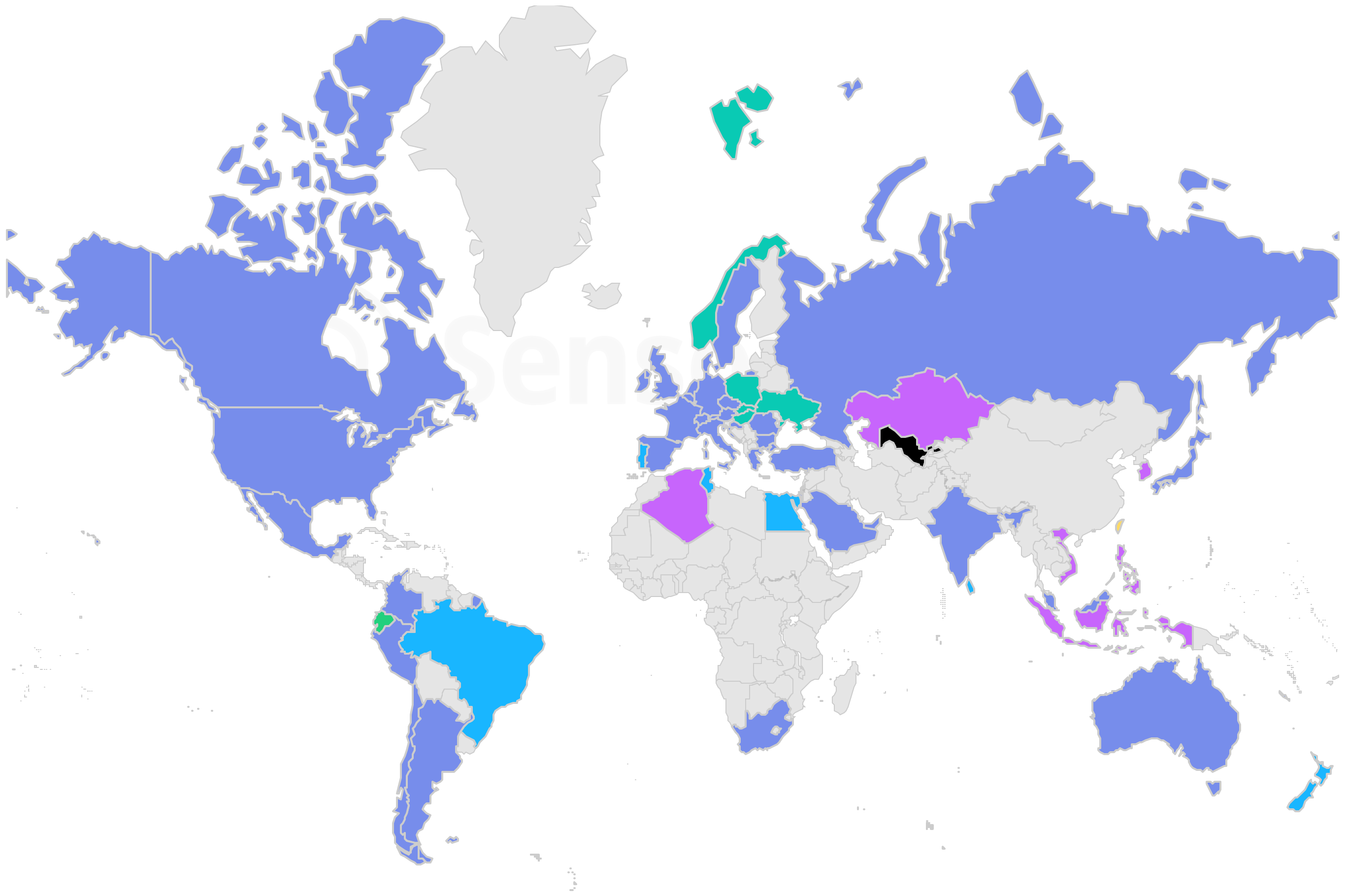
Books & Comics · Shopping · Investing & Financial Management · Buy & Sell



Top Gen AI Referral Growth Genres by Region

Q1 2026 vs Q1 2025

Books & Comics · Shopping · Computers & Consumer Electronics · Investing & Financial Management · Travel Booking Services & Travel Agencies · Buy & Sell · Sports Entertainment · Video Game Publisher



Source: Sensor Tower Web Insights
Note: Categories primarily associated with platform infrastructure, productivity workflows, or broad content distribution (e.g., Software, Jobs & Education, Social, News, and Blog categories) were excluded from portions of this analysis to better highlight consumer discovery and high-intent behavioral trends within Gen AI referral traffic.

Engagement: How Users Interact & Invest Time

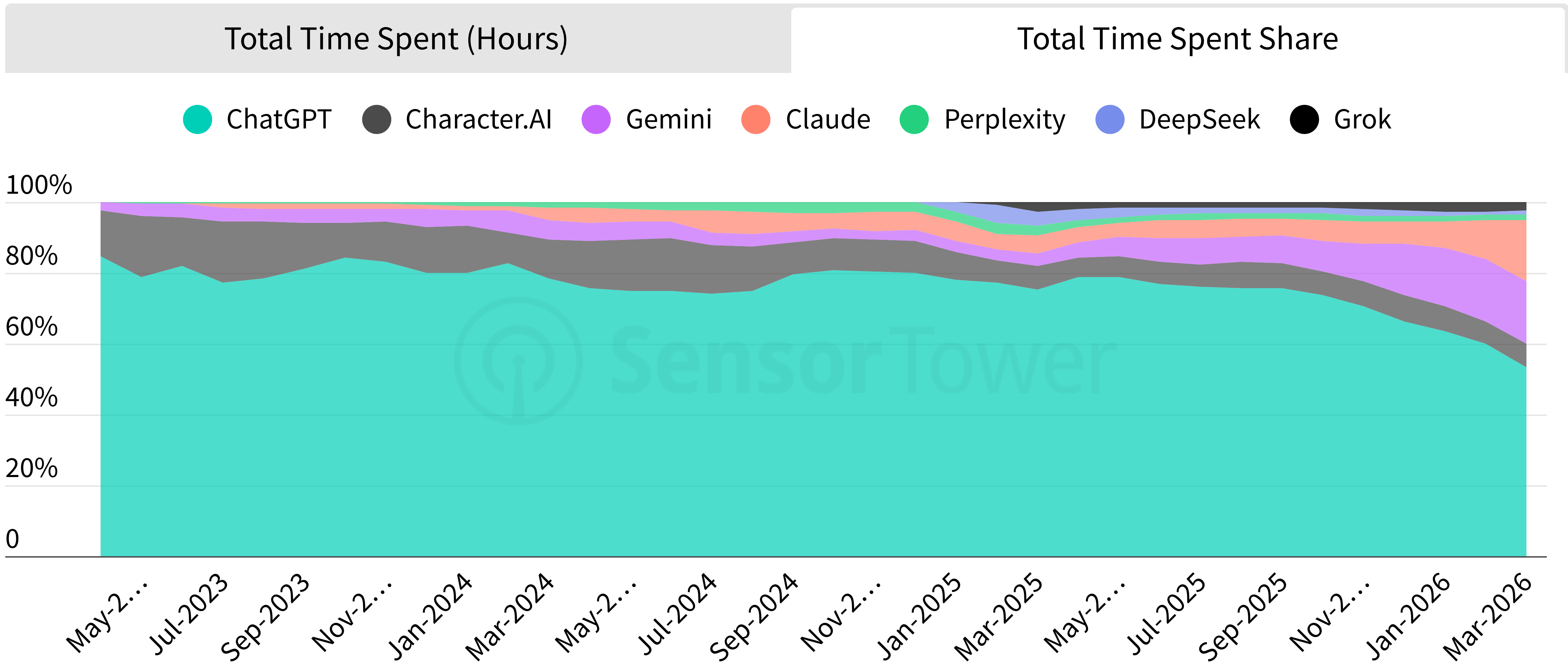
Gemini and Claude Challenge ChatGPT's Market Dominance

In Q1 2026, the total time spent on Generative AI sites in the US surged by approximately 3.2x compared to Q1 2024, reflecting the category's rapid evolution from novelty to necessity. Despite intensifying competition, ChatGPT remains the undisputed leader, commanding a 53% share of total AI time spent as of March 2026 (among the included top sites). This dominance is increasingly challenged by Gemini and Claude, both of which have maintained a consistent upward trajectory to collectively secure over 35% of the market's engagement.

Each AI assistant witnessed an upward trend in time spent per visitor. While ChatGPT and Claude demonstrated more modest climbs, increasing 8% and 11% YoY, respectively, Gemini saw a massive engagement leap. Time spent on Gemini surged from 1.2 to 3.1 hours per visitor per month, a 158% YoY increase.

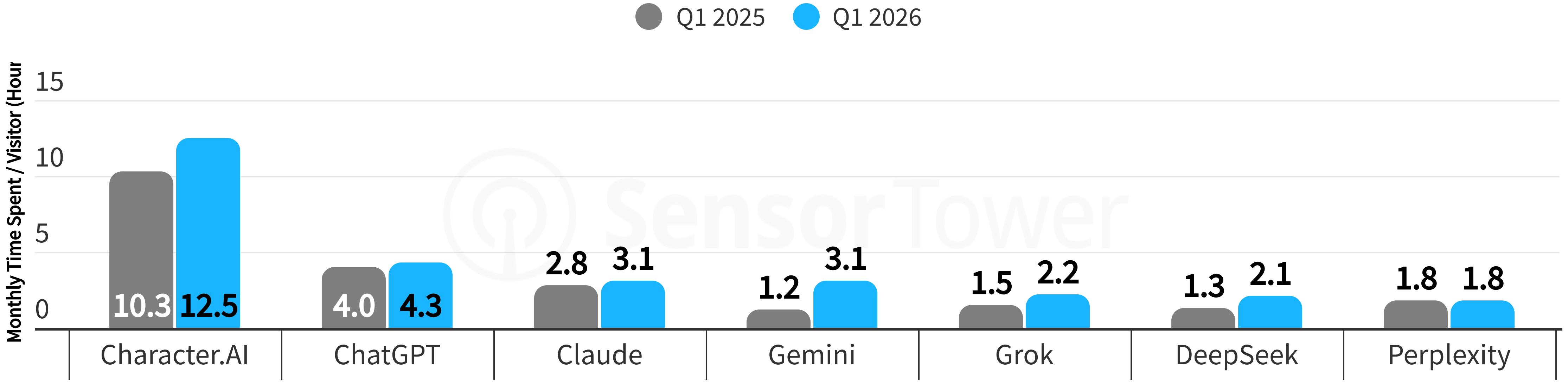
Source: Sensor Tower Web Insights

Total Time Spent on AI Assistant Sites in the US



AI Assistant Engagement Performance

United Sates



Engagement with Short-Form Video Continues to Climb on Web Browsers

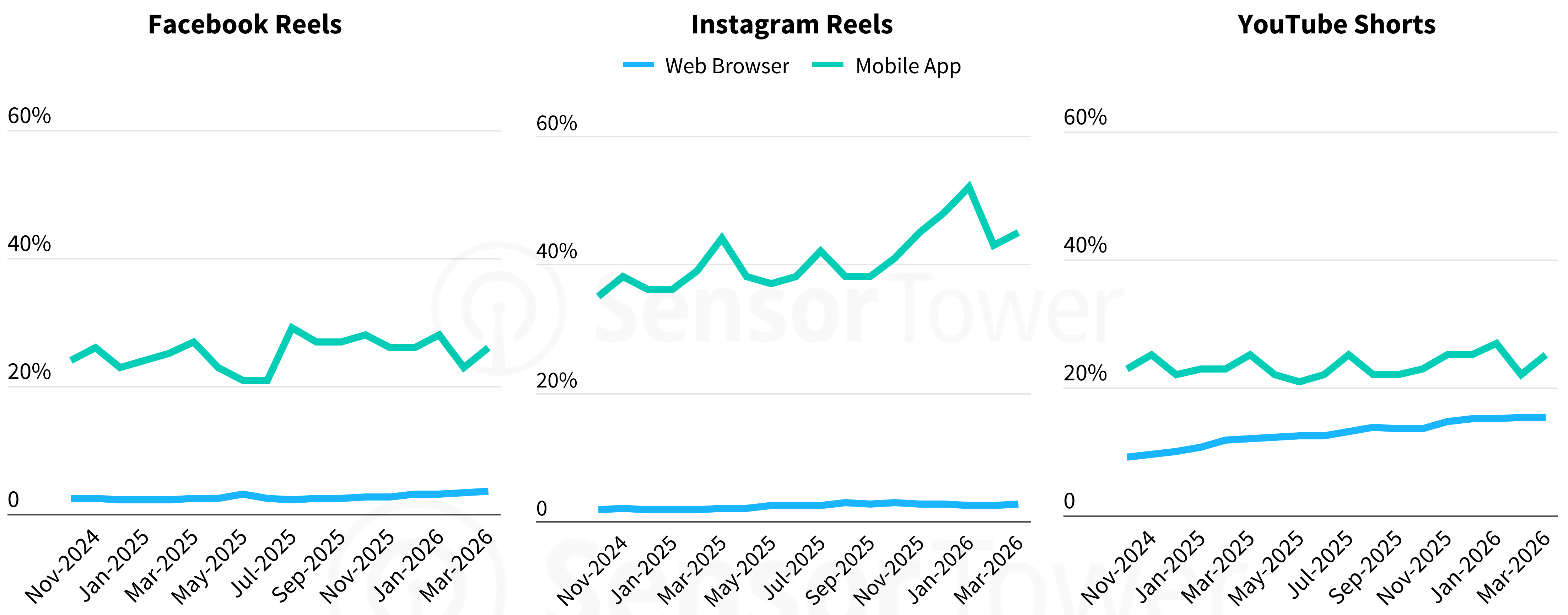
YouTube has more successfully integrated short-form video into its browser ecosystem compared to Meta, whose platforms remain primarily app-driven. YouTube Shorts maintained a strong upward trajectory on web browsers, achieving a 55% increase in total time spent by March 2026 compared to October 2024. By the end of this period, Shorts accounted for over 15% of the total time spent on the YouTube web platform, a 6 percentage points (PPTs) increase.

Meta's short-form video growth remains heavily concentrated within its mobile apps. While Instagram Reels saw a powerful surge on mobile, where its time-spent share climbed 10 PPTs to reach 46%, its browser ecosystem saw only a modest upward trend and accounted for a mere 2.6% share in March 2026.

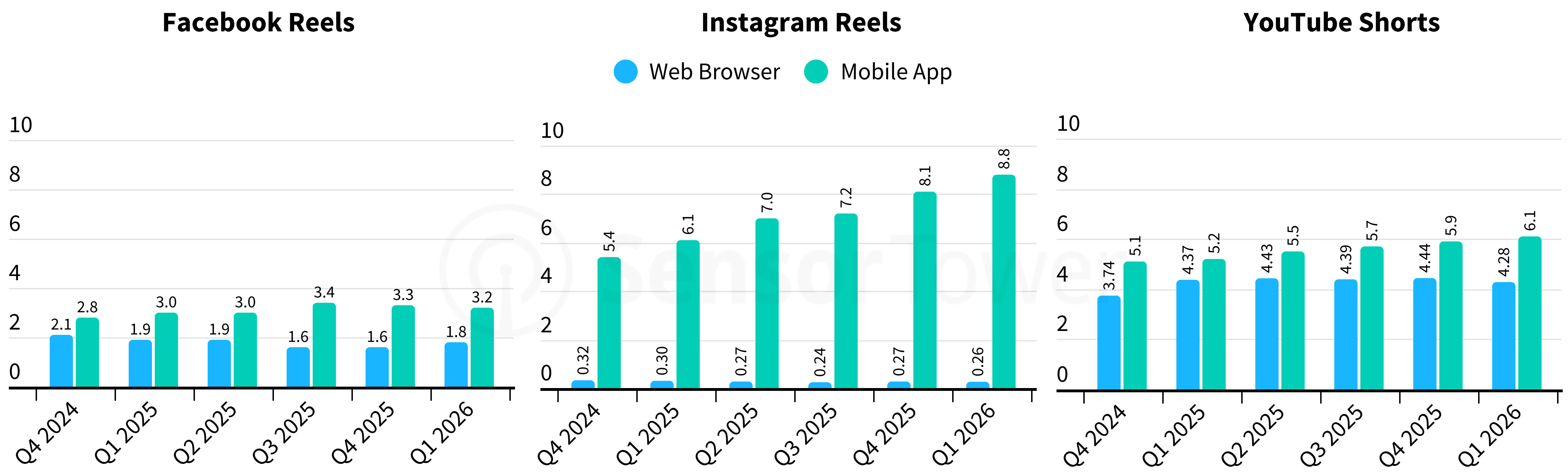
This growth gap is further reflected in engagement depth, as YouTube Shorts users spent over 4 hours per month on the browser, significantly outperforming Facebook (1.8 hours) and Instagram (16 minutes).

Source: Sensor Tower Web Insights and Mobile App Insights
Note: Short video web estimates determined using paths data (youtube.com/paths, instagram.com/reels, etc.). Mobile share includes Android users in the United States.

Short Video's Share of Time Spent Among Select Top Social Platforms, United States



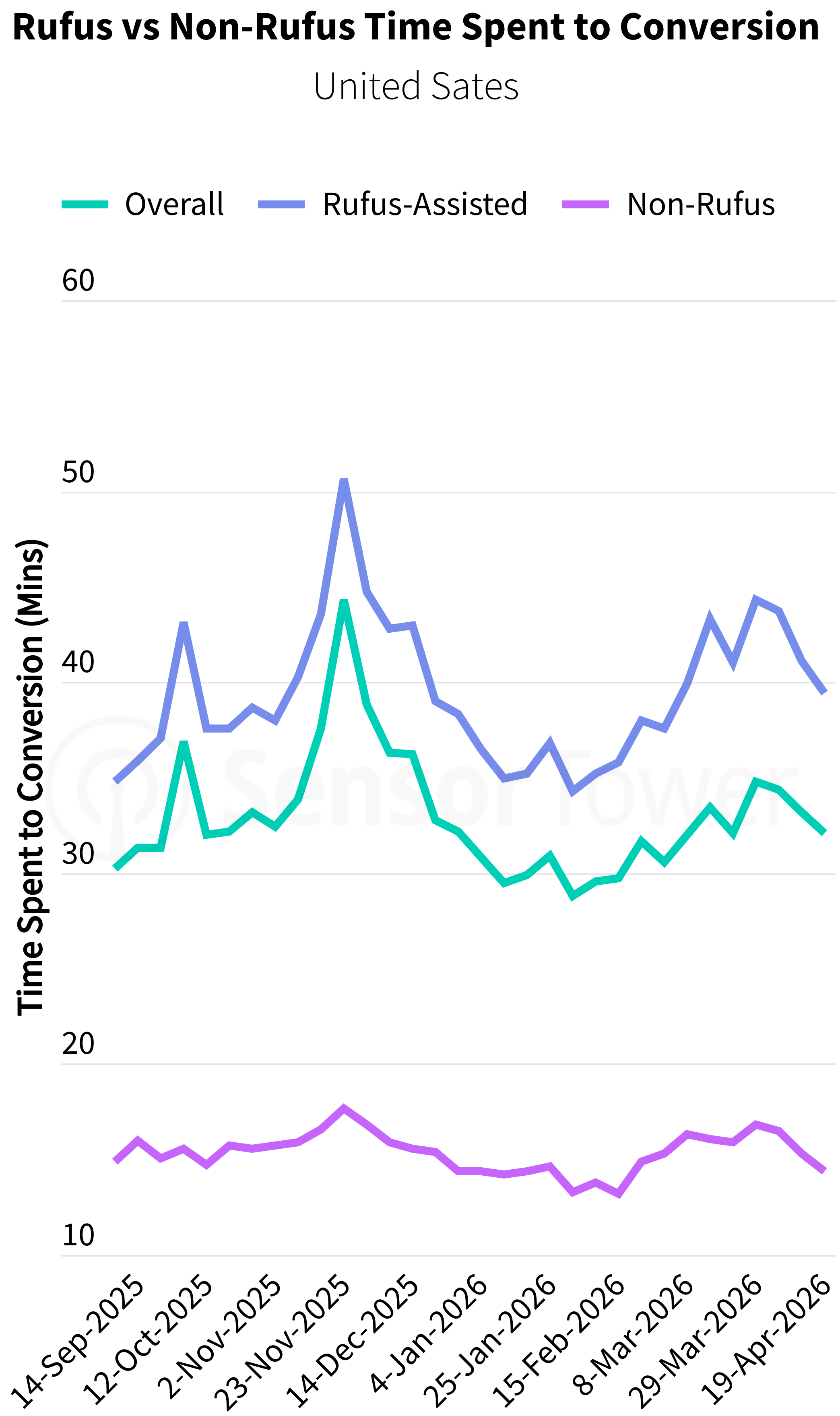
Monthly Hours per Visitor across Web Browser and Mobile App, United States

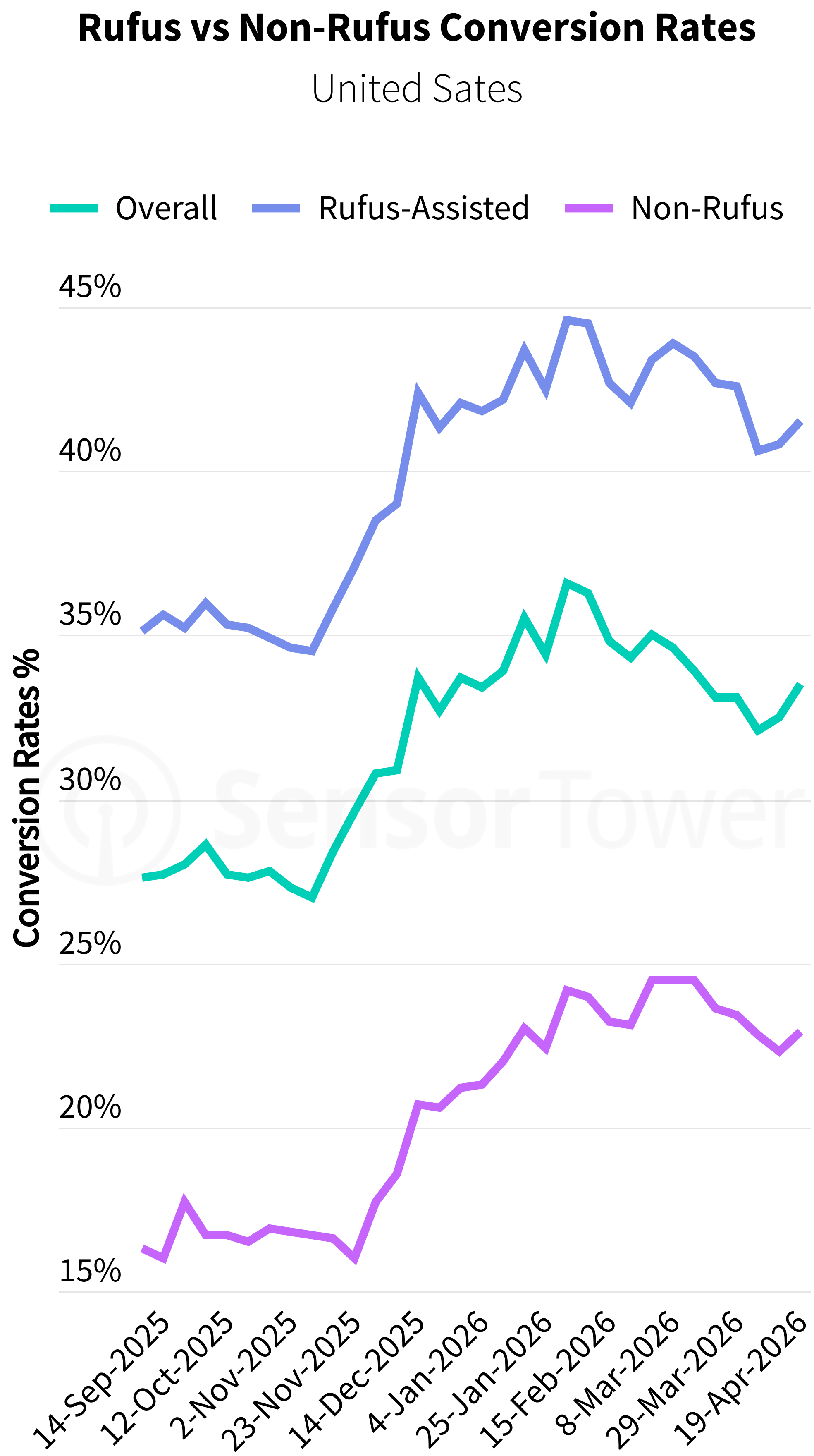


Rufus Boosts Amazon Conversion and Shopper Engagement

Amazon shoppers utilizing Rufus convert at nearly twice the rate of non-Rufus shoppers. While Rufus-assisted sessions maintained a conversion rate above 40% throughout Q1 2026, non-Rufus shoppers hovered around 20%, suggesting that the AI effectively reduces purchase hesitation by providing the specific information necessary to finalize a sale.

Furthermore, Rufus-assisted shoppers invest significantly more time on the platform prior to completing a purchase. While non-Rufus shoppers keep their journeys brief (less than 20 minutes), Rufus users lean into the tool for deeper research and product comparison. Notable spikes in time spent during Prime Day and Black Friday weeks indicate that Rufus substantially increases shopper engagement, serving as a critical guide through complex deal environments.





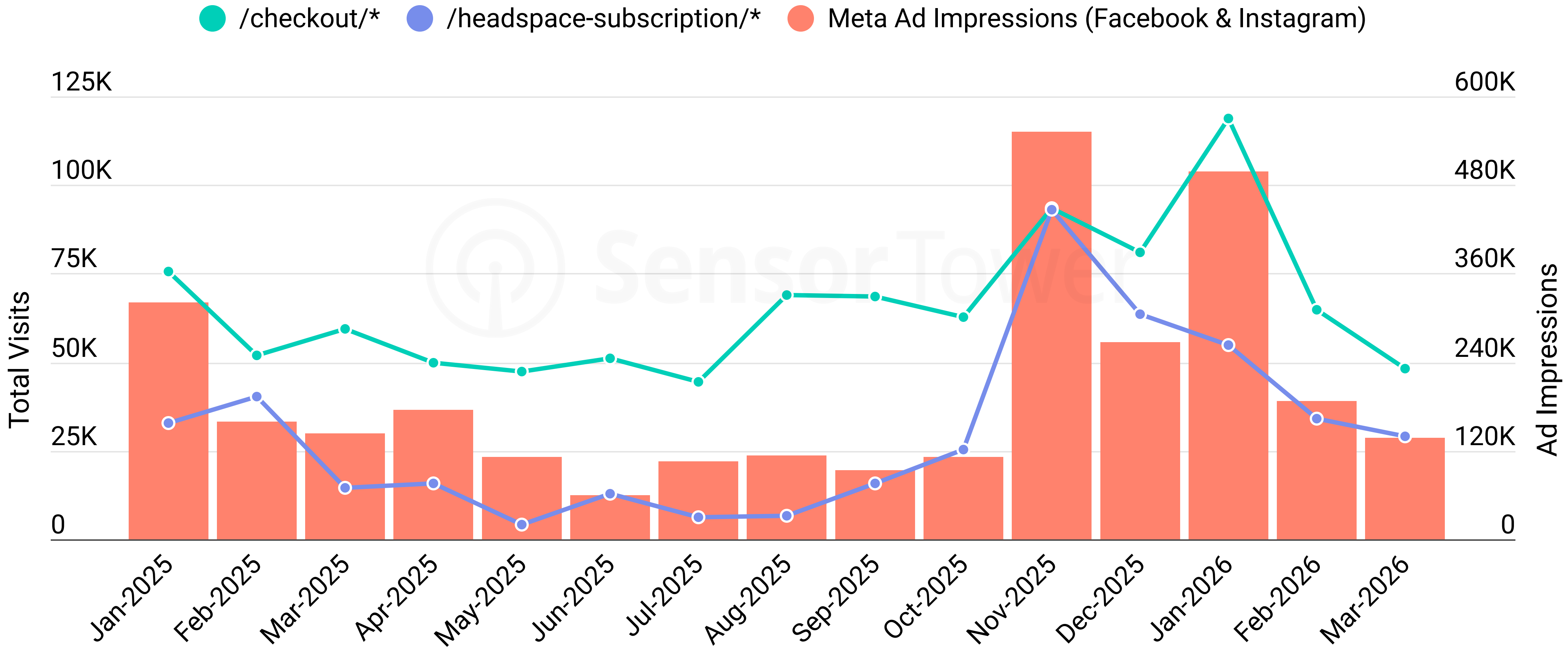
Headspace Seasonal Growth: From Ad Impressions to Action

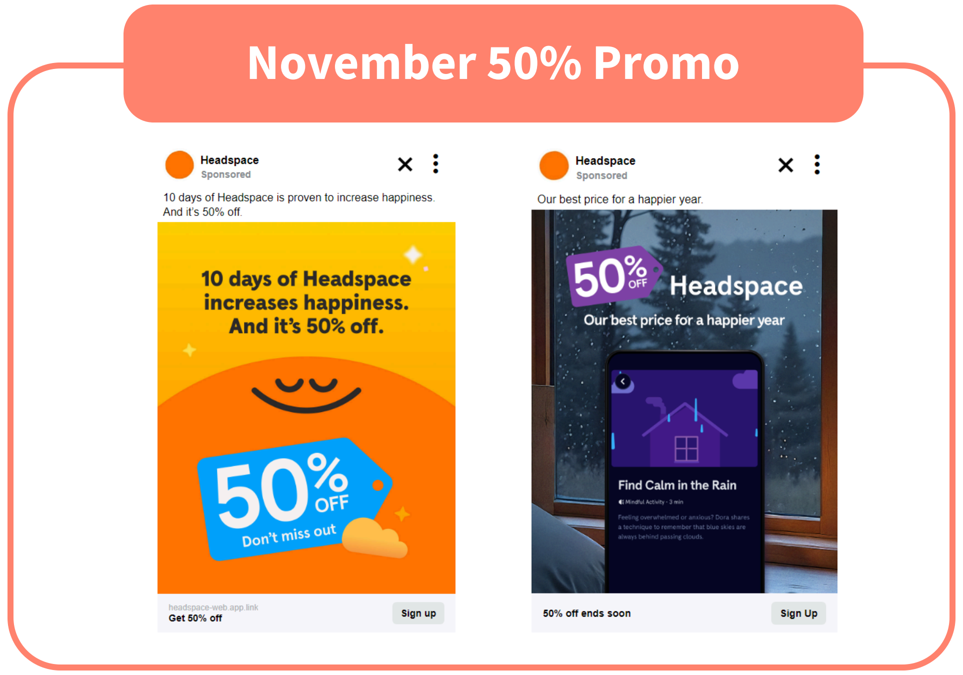
Headspace's November 50% discount triggered a 269% surge in subscription landing page visits, directly fueled by a significant ramp-up in ad investment across Meta platforms. The nearly 1:1 ratio between informational page visits and checkout entries indicates the discount was highly effective at pulling users through the consideration phase and deep into the lower funnel.

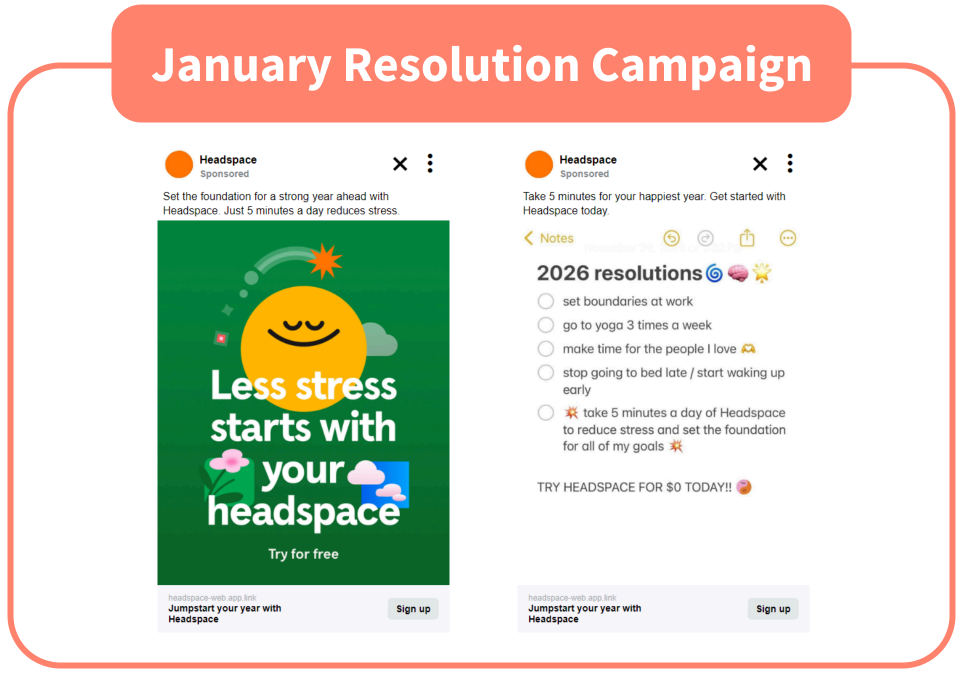
January marked a shift toward high-velocity intent, with checkout visits reaching a record 119K despite a decrease in subscription page browsing. This indicates that new year resolution shoppers arrived with a pre-determined intent to buy, frequently bypassing informational pages to enter the checkout flow directly.

Headspace Subscription Path Traffic vs. Digital Advertising

United States







Source: Sensor Tower Web Insights, Pathmatics Digital Advertising Insights

User Journey
& Traffic Flow

Social Media as the Primary Discovery Gateway

Social Media is the leading driver of discovery across the digital landscape, accounting for 23% of traffic to OTT Streaming and 21% to Gaming. Even for AI Assistants, social platforms drive 14% of landings, proving that social discovery is a vital catalyst for AI adoption. Beyond social influence, AI tools are becoming deeply integrated into professional workflows, capturing 10% of their traffic from Jobs and Education, indicating that users are increasingly pivoting to AI while in a productivity or research mindset.

Destination Genre

Source Genre	Social Media	Jobs & Education	Shopping	News	AI Assistant	inancial Service	Gaming	Health & Wellness	Food & Dining Services	Travel & Tourism	Sports Entertainment	OTT Streaming	Real Estate	Auto	Consumer Packaged Goods
Social Media	**21.8%**	8.5%	11.0%	12.6%	13.9%	7.4%	21.1%	7.4%	7.4%	6.2%	14.7%	22.5%	7.2%	8.7%	8.4%
Jobs & Education	3.5%	**24.7%**	1.9%	2.5%	9.9%	2.5%	1.7%	5.0%	1.9%	2.1%	1.9%	2.7%	2.8%	1.6%	1.9%
Shopping	4.9%	2.1%	**24.3%**	3.3%	4.0%	6.6%	3.3%	4.8%	5.3%	4.2%	2.7%	5.6%	4.0%	5.8%	13.7%
News	3.5%	1.6%	2.2%	**27.4%**	1.5%	3.7%	2.3%	2.5%	2.6%	3.4%	10.7%	2.2%	2.6%	4.0%	1.5%
AI Assistant	1.8%	2.8%	1.0%	0.8%	**9.1%**	1.4%	0.8%	1.3%	0.6%	0.9%	0.7%	1.2%	1.1%	0.9%	0.7%
Financial Services	1.4%	1.0%	2.0%	2.1%	2.1%	**27.7%**	0.9%	2.3%	1.0%	2.6%	1.1%	1.3%	2.8%	3.0%	2.0%
Gaming	3.9%	0.7%	1.2%	1.2%	1.2%	1.1%	**15.9%**	0.5%	0.6%	0.5%	2.1%	2.1%	0.5%	0.8%	0.8%
Health & Wellness	0.9%	1.5%	1.3%	1.0%	1.1%	1.7%	0.4%	**14.6%**	1.7%	1.2%	1.2%	0.6%	0.9%	0.9%	2.8%
Food & Dining Services	0.6%	0.3%	0.9%	0.7%	0.4%	0.6%	0.3%	1.1%	**19.7%**	1.3%	0.4%	0.4%	0.6%	0.5%	2.4%
Travel & Tourism	0.5%	0.4%	0.7%	0.8%	0.6%	1.3%	0.2%	0.8%	1.1%	**20.4%**	0.5%	0.4%	1.2%	0.8%	0.6%
Sports Entertainment	1.1%	0.3%	0.4%	2.3%	0.3%	0.4%	1.0%	0.7%	0.3%	0.4%	**16.4%**	1.4%	0.4%	0.7%	0.3%
OTT Streaming	1.1%	0.4%	0.8%	0.4%	0.5%	0.4%	0.6%	0.3%	0.3%	0.2%	0.8%	**11.5%**	0.3%	0.3%	0.3%
Real Estate	0.3%	0.3%	0.3%	0.3%	0.4%	0.6%	0.1%	0.3%	0.3%	0.6%	0.2%	0.2%	**21.8%**	0.4%	0.2%
Auto	0.4%	0.2%	0.5%	0.4%	0.3%	0.5%	0.2%	0.3%	0.3%	0.3%	0.4%	0.2%	0.4%	**20.4%**	0.4%
Consumer Packaged Goods	0.1%	0.0%	0.3%	0.1%	0.1%	0.3%	0.1%	0.2%	0.4%	0.1%	0.0%	0.1%	0.1%	0.1%	**4.2%**

Example: *13.7% of Consumer Packaged Goods' inbound traffic comes directly from Shopping sites*

Note: While Browsers and Search Engines account for 25% of total inbound traffic, they are excluded from this chart to highlight direct discovery paths between sectors.

Source: Sensor Tower Web Insights
Note: Inbound traffic flow in the United States in Q1 2026.

Retailers Leverage Social Platform Specificity to Drive Inbound Traffic

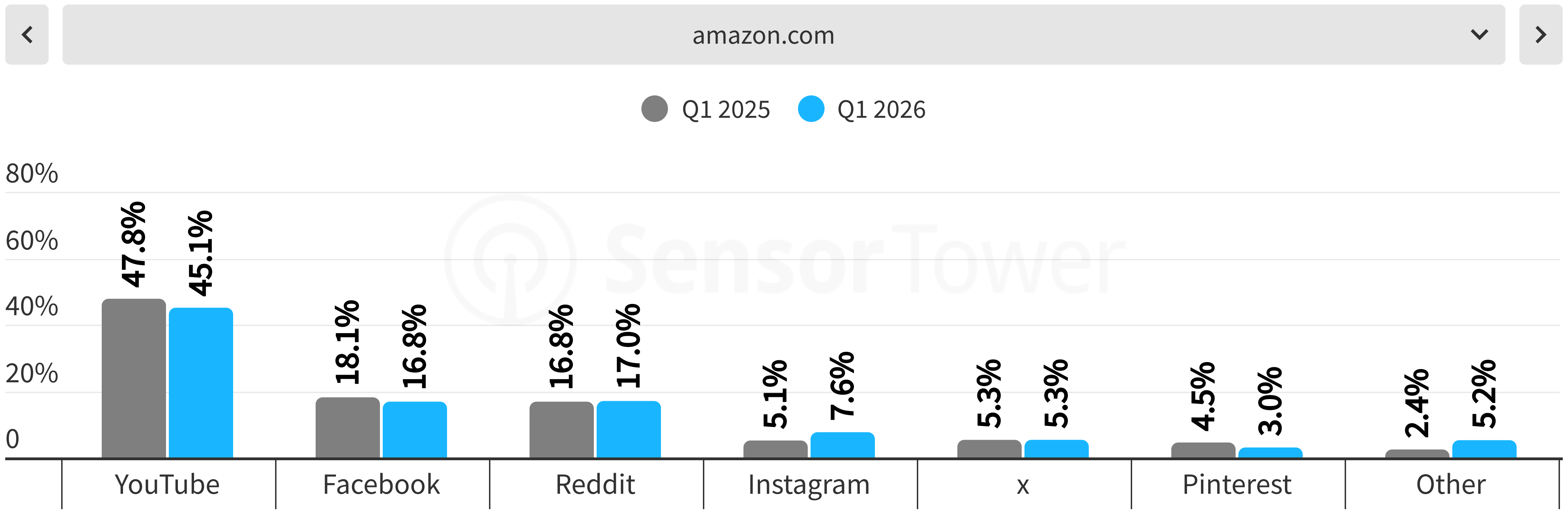
Social media serves as a vital gateway for the retail sector, accounting for 11% of all inbound traffic to Shopping sites. While most retailers see their inbound flow dominated by YouTube and Facebook, specialized brands draw heavily from community-driven channels. Home Depot and Best Buy capture over 30% of their social inbound traffic from Reddit despite maintaining only single-digit ad impression shares. This underscores a massive organic reach fueled by community engagement, revealing an opportunity to scale impressions through targeted advertising.

Meanwhile, Etsy is increasingly optimizing its digital spend by shifting focus from mature organic channels to high-conversion visual search engines. While Etsy continues to leverage strong organic reach on Instagram, it has reallocated social ad investment toward Pinterest, where its ad share jumped from 19% to 39%. This strategic pivot converted directly into increased inbound traffic, proving the effectiveness of capturing users at the point of discovery.

Source: Sensor Tower Web Insights, Pathmatics Digital Advertising Insights
Note: Other social channels include Twitch, TikTok, Discord, and Snapchat.

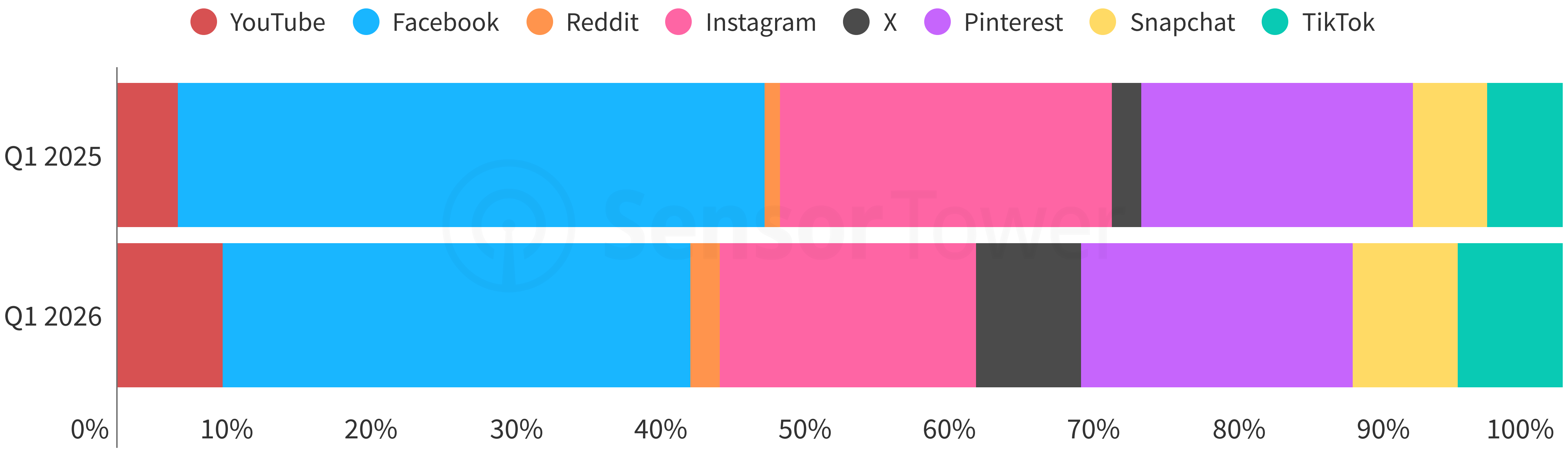
Social Media Referral Traffic to Retail

United Sates



Social Ad Impression Share

United Sates



Priceline and Airbnb Securing the Final Travel Click

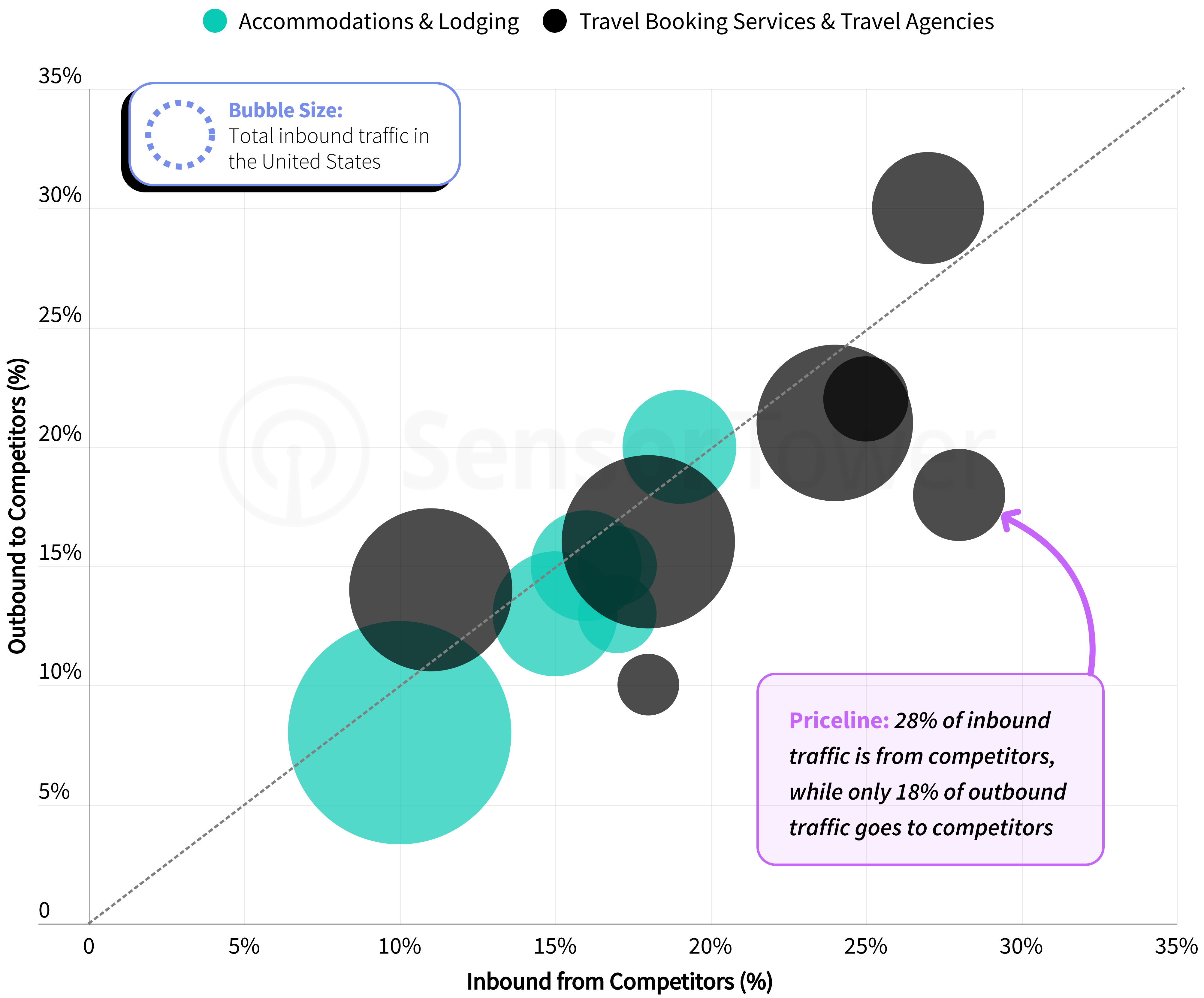
Online Travel Agencies (OTAs) show significantly higher cross-shopping volatility than direct hotel brands, as customers frequently bounce between multiple platforms to secure the lowest price. Priceline and Trip.com emerge as the most effective at converting rival traffic into final destinations.

Priceline, for instance, successfully acquires 28% of its visitors directly from competitors while losing only 18% in return, suggesting that its value oriented interface effectively encourages users to end their search on the platform.

In the Accommodations and Lodging sector, Airbnb maintains a remarkably loyal user base. Most users navigate directly to Airbnb rather than arriving from a rival site, and only 8% of its audience leaks to other platforms.
In contrast, Vrbo sees 20% of its users exit to a competitor immediately after browsing, indicating that its audience is much more likely to cross-shop before making a decision.

Source: Sensor Tower Web Insights
Note: Competitive set includes the Accommodations & Lodging and Travel Booking Services & Travel Agencies subgenres.

Inbound vs Outbound Competitor Traffic Flow
Q1 2026 in the United States



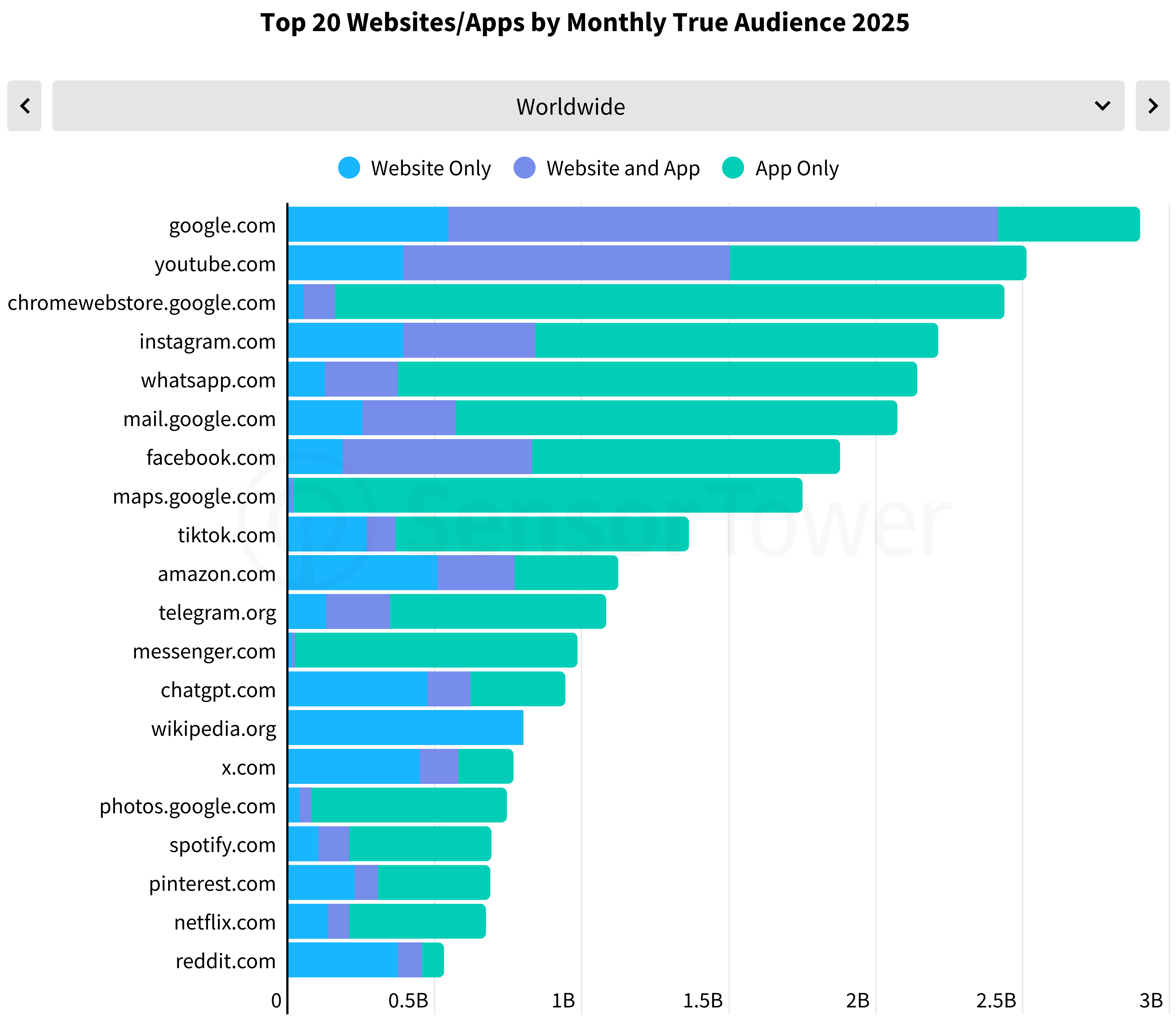
Device Overlap: Apps vs. Web

Alphabet Occupies the Top Three Spots in Global True Audience Rankings

Sensor Tower's true audience metric measures the number of unique users across mobile app, mobile web, and desktop web. Alphabet and Meta maintain a digital duopoly over global attention, anchored by Google with an average monthly true audience of 2.9 billion in 2025. This dominance is reinforced by a suite of essential platforms, including YouTube at 2.5 billion, Google Chrome at 2.4 billion, Instagram at 2.2 billion, and WhatsApp at 2.1 billion monthly users.

While these platforms consistently occupy the top spots across nearly every market, Japan and South Korea remain notable exceptions. Their local giants like Yahoo! JAPAN (#2 in Japan) and Naver (#1 in South Korea) remain the preferred choice for users.

Source: Sensor Tower Web Insights



AI Assistants are Bridging the Cross Platform Divide

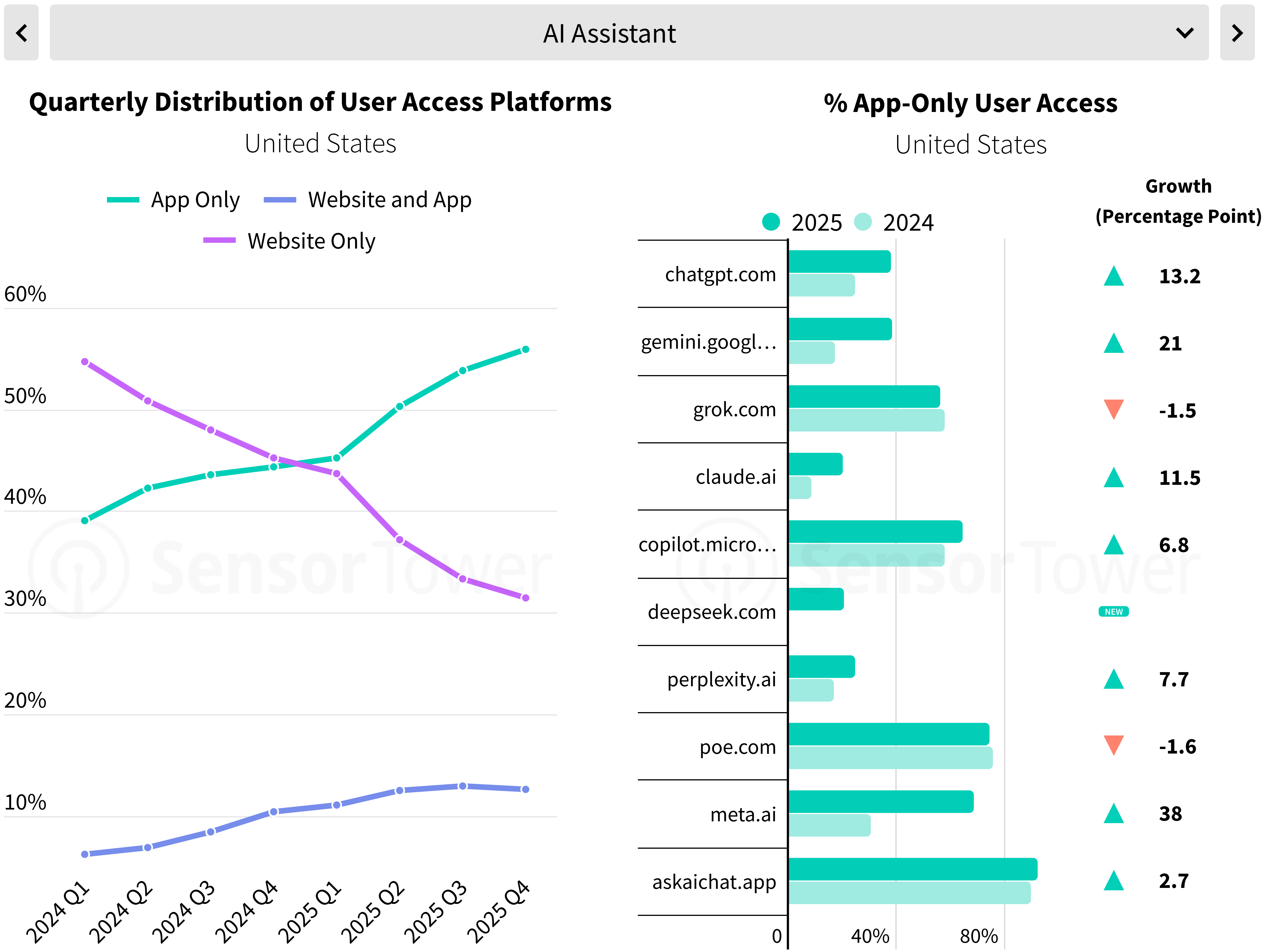
User behavior across the digital landscape is highly distinguished by genre. Social Media serves as the benchmark for platform synergy, with approximately 20% of users engaging through both the app and the web. In contrast, mobile-native sectors such as Dating (88% app only) and OTT Streaming (70% app only) dominate the app environment, while information-heavy categories like News (83% web only) and Jobs & Education (64% web only) remain centered on the browser.

Notably, the Shopping sector maintains a low cross-platform overlap of only ~7%. This disparity suggests a significant opportunity for retailers to better synchronize their omnichannel experiences to retain users within their ecosystems.

The AI Assistant sector, however, has successfully transitioned from a specialized web utility into a pervasive mobile habit. The cohort of users engaging via both the web and app more than doubled to 12.6% in Q4 2025 relative to Q1 2024, indicating that AI has evolved beyond a stationary productivity tool into a high intent, mobile first daily utility.

Source: Sensor Tower Web Insights

Device Overlap: Unique Users Across App and Web by Genre

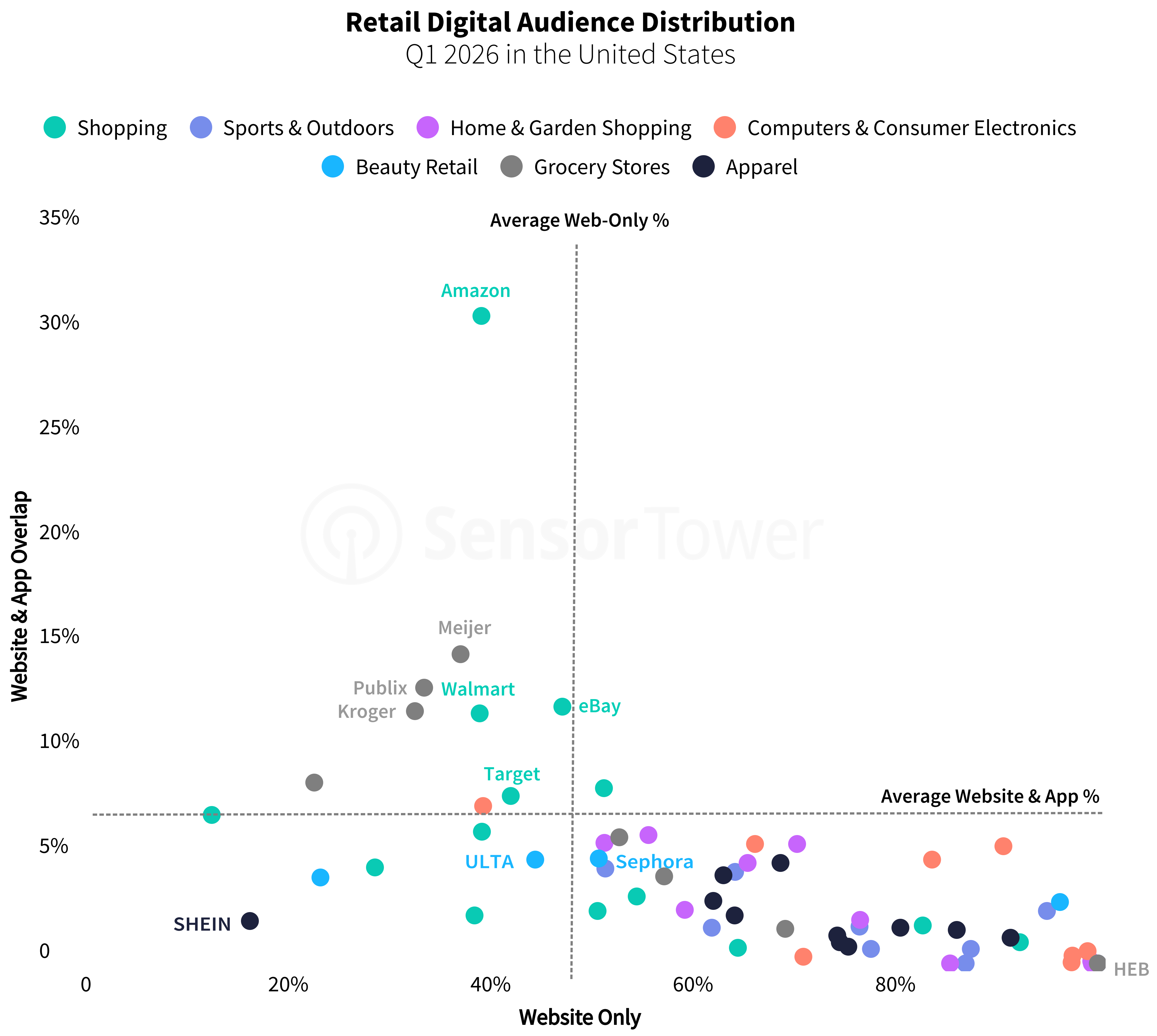


Amazon, The Omnichannel Winner

Amazon remains the ultimate omnichannel leader with a 31% device overlap, an impressive 4x higher than the shopping average (7%). This sticky ecosystem enables a seamless transition where users leverage the web for deep research and the app for transactional convenience, effectively locking shoppers into a continuous loop of engagement. Walmart follows, maintaining a lead over other traditional retailers with a 12% overlap.

Among grocery retailers, Meijer (15%), Publix (13%), and Kroger (12%) demonstrate high omnichannel maturity with over 10% device overlap, indicating seamless web and mobile engagement. Conversely, H-E-B and Total Wine maintain a dominant website only presence. This presents a key opportunity to convert transient web browsers into loyal app users, leveraging the mobile experience to deepen engagement.

Source: Sensor Tower Web Insights



AI Snapshot: Citations & Traffic Flows

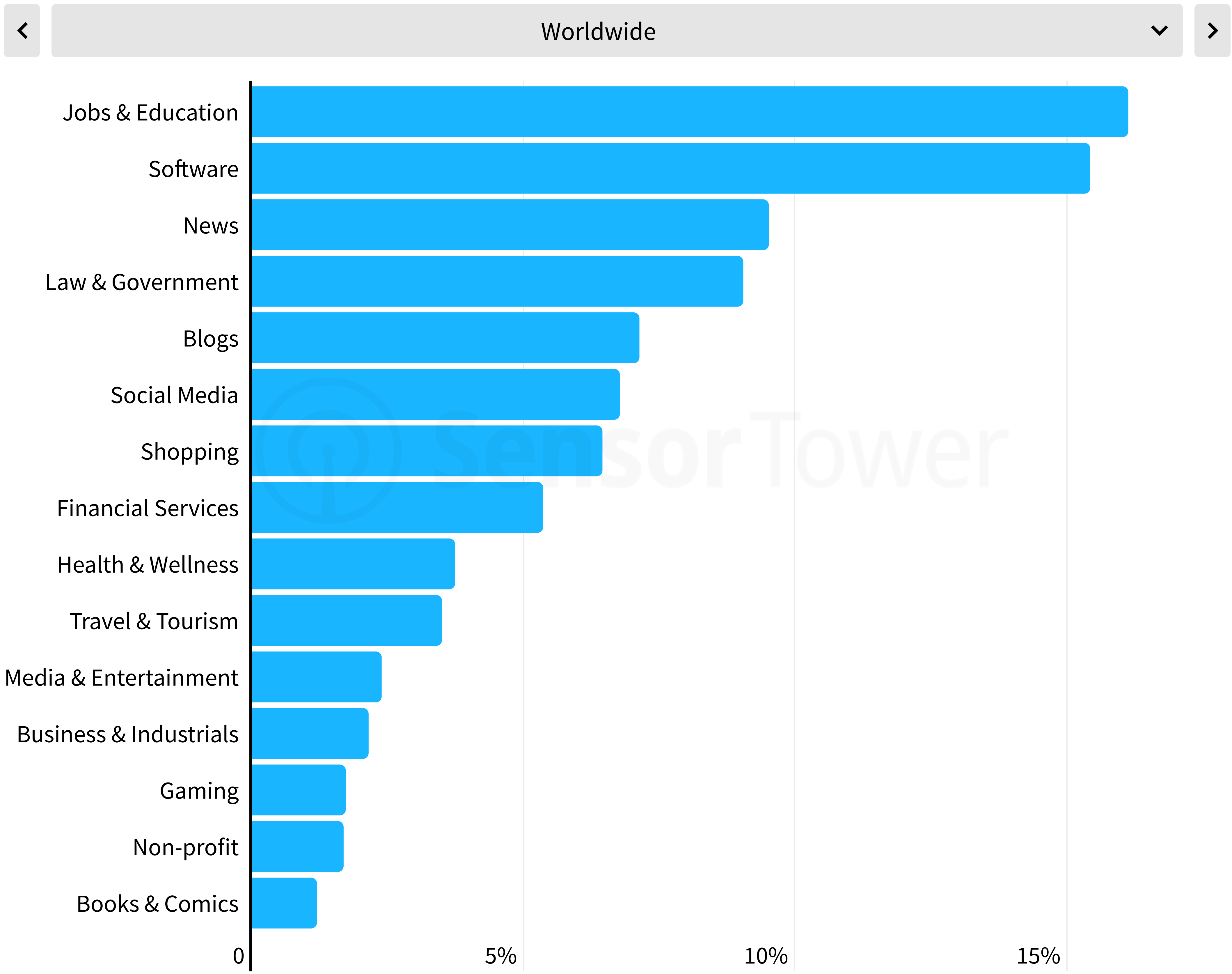
How Maturing User Habits are Shaping AI Citations

The foundation of ChatGPT-generated answers rests on two dominant pillars, Jobs & Education (16%) and Software (15%), which collectively account for nearly one-third of all worldwide citations. These sectors provide the structured logic and technical depth that define high-utility LLM outputs, while News (10%) and Blogs (7%) serve as the second-tier knowledge sources.

Beyond these information-heavy sectors, the notable presence of citations Law & Government (9%), Shopping (6%), and Financial Services (5%) reflects a maturing of user habits. This indicates that AI assistants are increasingly being utilized as trusted consultants for navigating complex regulatory landscapes, informed consumerism, and personal financial decisions, moving well beyond simple information retrieval.

Source: Sensor Tower Web Insights

Share of ChatGPT Citations in Q1 2026

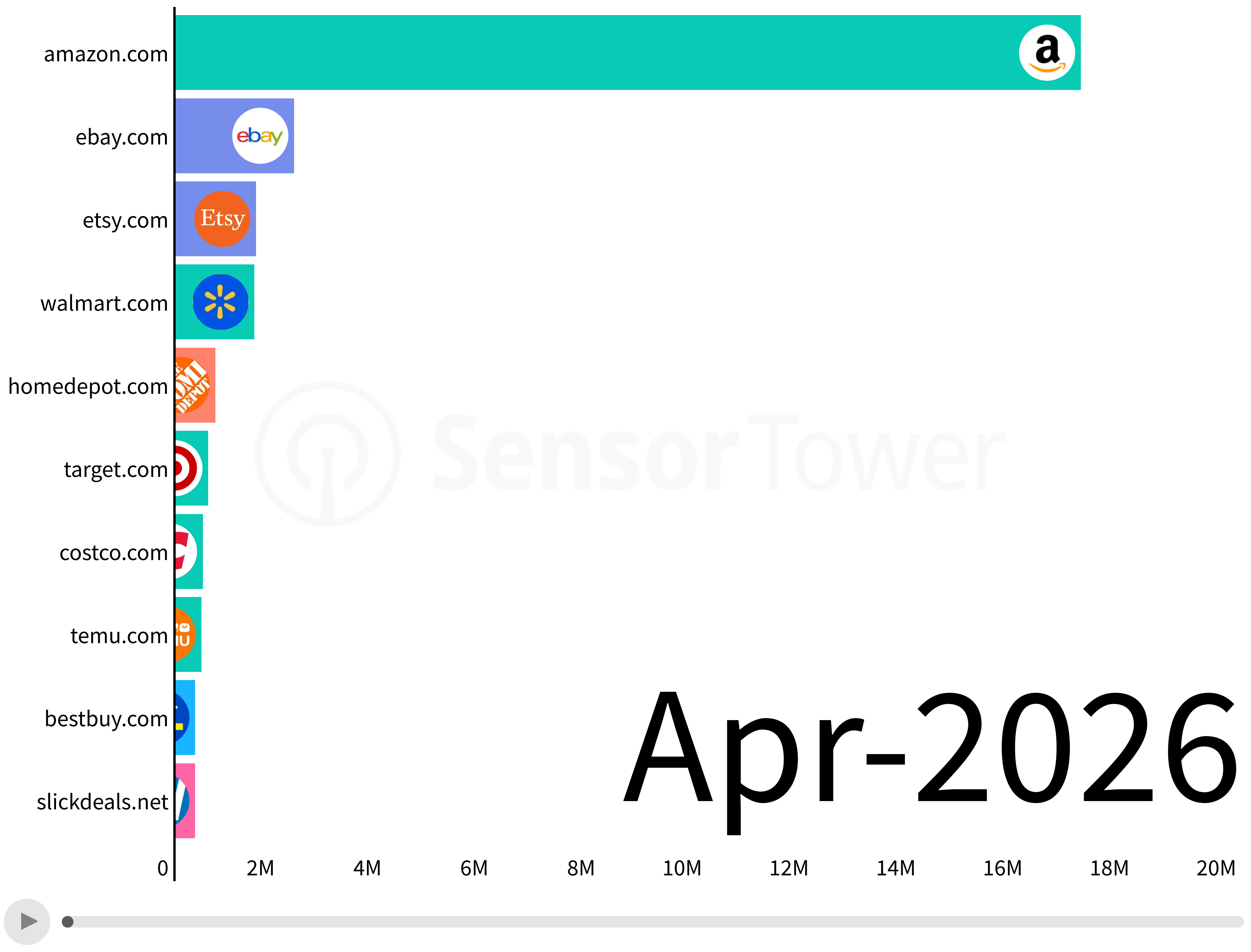


Amazon Leads the Small but Growing Race for AI Traffic

As shoppers increasingly use generative AI during the discovery phase, retailers will need to monitor how their brands appear in AI-generated responses and how effectively those interactions convert into site traffic. By April 2026, top shopping websites in the US generated more than 33 million visits from Gen AI sources, up more than 600% from April 2023. Despite this rapid growth, AI referrals remain relatively small compared to the more than 2 billion visits recorded by the top 100 shopping sites in April 2026.

Outside of Amazon, no retailers generated more than 500K Gen AI-driven visits prior to mid-2024. By April 2026, however, seven retailers had surpassed that threshold. Buy-and-sell marketplaces such as eBay and Etsy each exceeded 1.5 million monthly Gen AI visits, while Walmart, Target, Costco, and The Home Depot also surpassed 500K visits from AI sources.

Monthly Gen AI Traffic to Shopping Websites in the United States



Source: Sensor Tower Web Insights
Note: Includes the top 100 Shopping websites by US visits in Q1 2026. Gen AI Traffic captures any visit to a website where the user was active on a generative AI platform (such as ChatGPT, Gemini, or Claude) within 30 seconds prior to the site visit.

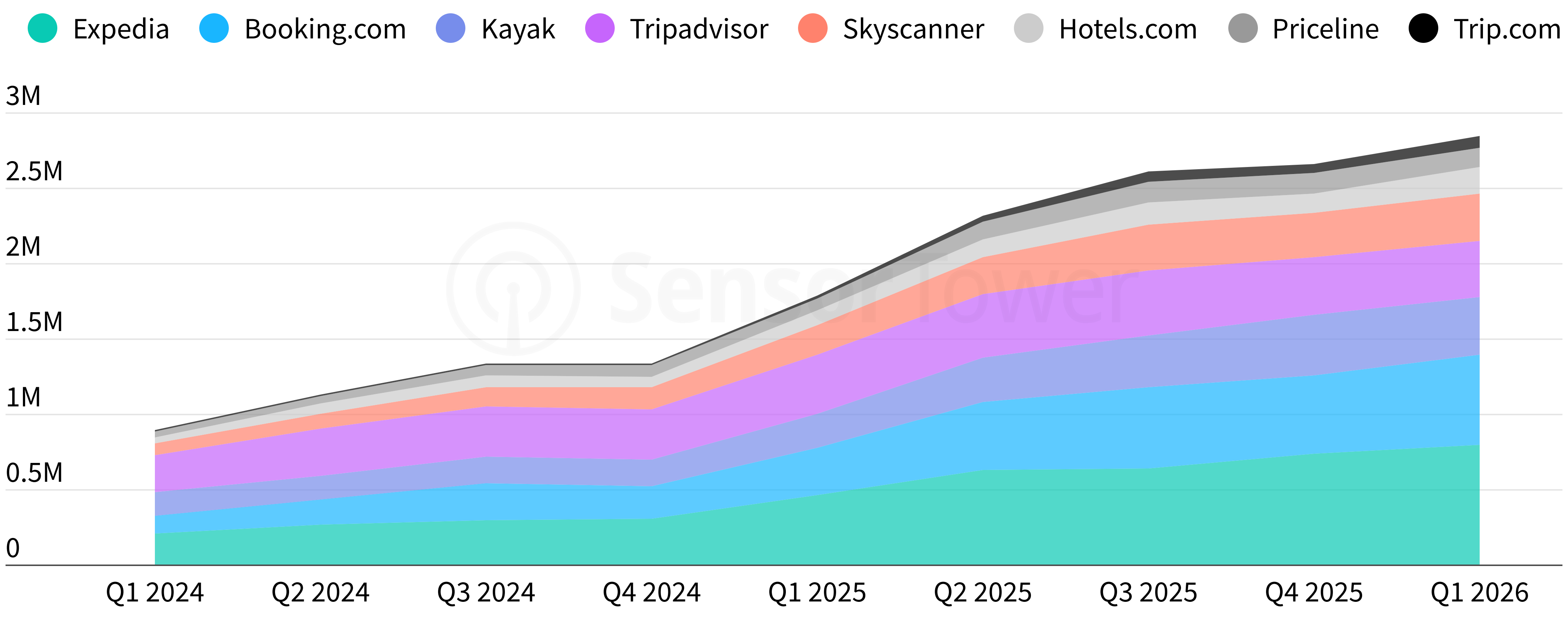
Expedia and Booking.com Master the 'AI-to-Action' Pipeline

The consumer journey for travel is shifting as users increasingly leverage Generative AI for end-to-end trip planning. Total Gen AI-driven traffic to top travel booking services surged from 1 million visits in Q1 2024 to nearly 3 million in Q1 2026. While this currently represents less than 1% of total aggregate web traffic, the consistent upward trajectory positions AI as a critical interface for the earliest stages of the travel discovery funnel.

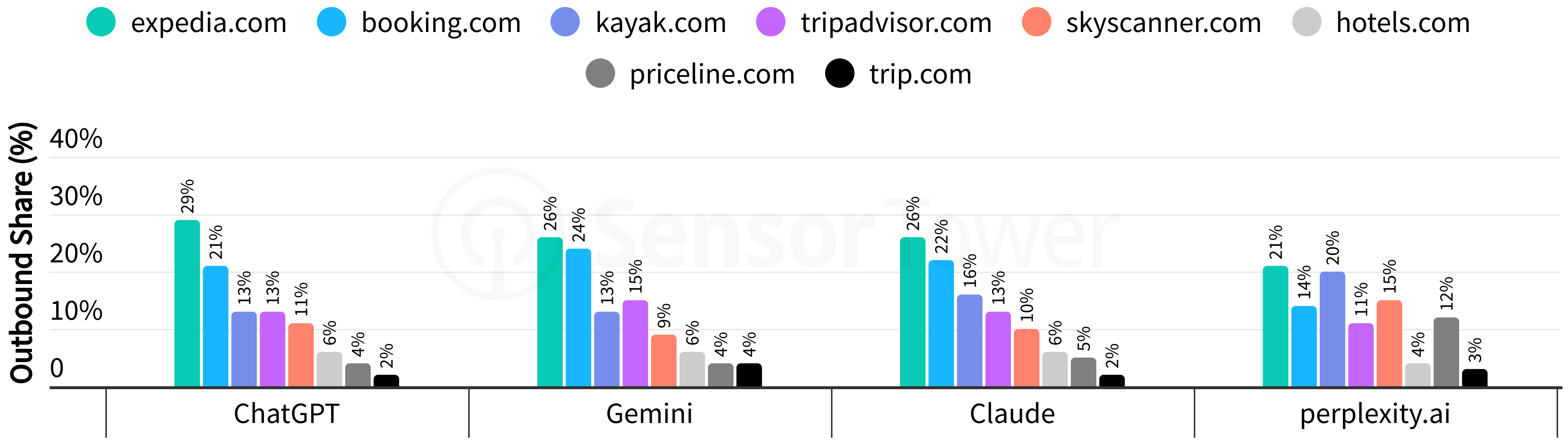
Expedia and Booking.com dominate the conversational AI landscape, capturing approximately 50% of post-session traffic from ChatGPT, Gemini, and Claude as the primary destinations for broad trip fulfillment. In contrast, Perplexity drives a more fragmented, research-heavy journey, where Kayak, Skyscanner, and Priceline capture a combined 47% share, nearly double their footprint on other platforms.

Source: Sensor Tower Web Insights
Note: Gen AI Traffic captures any visit to a website where the user was active on a generative AI platform (such as ChatGPT, Gemini, or Claude) within 30 seconds prior to the site visit.

Gen AI Traffic to Travel Booking Services
in the United States



Gen AI Outbound Traffic Share by Travel Booking Services
in the United States, Q1 2026

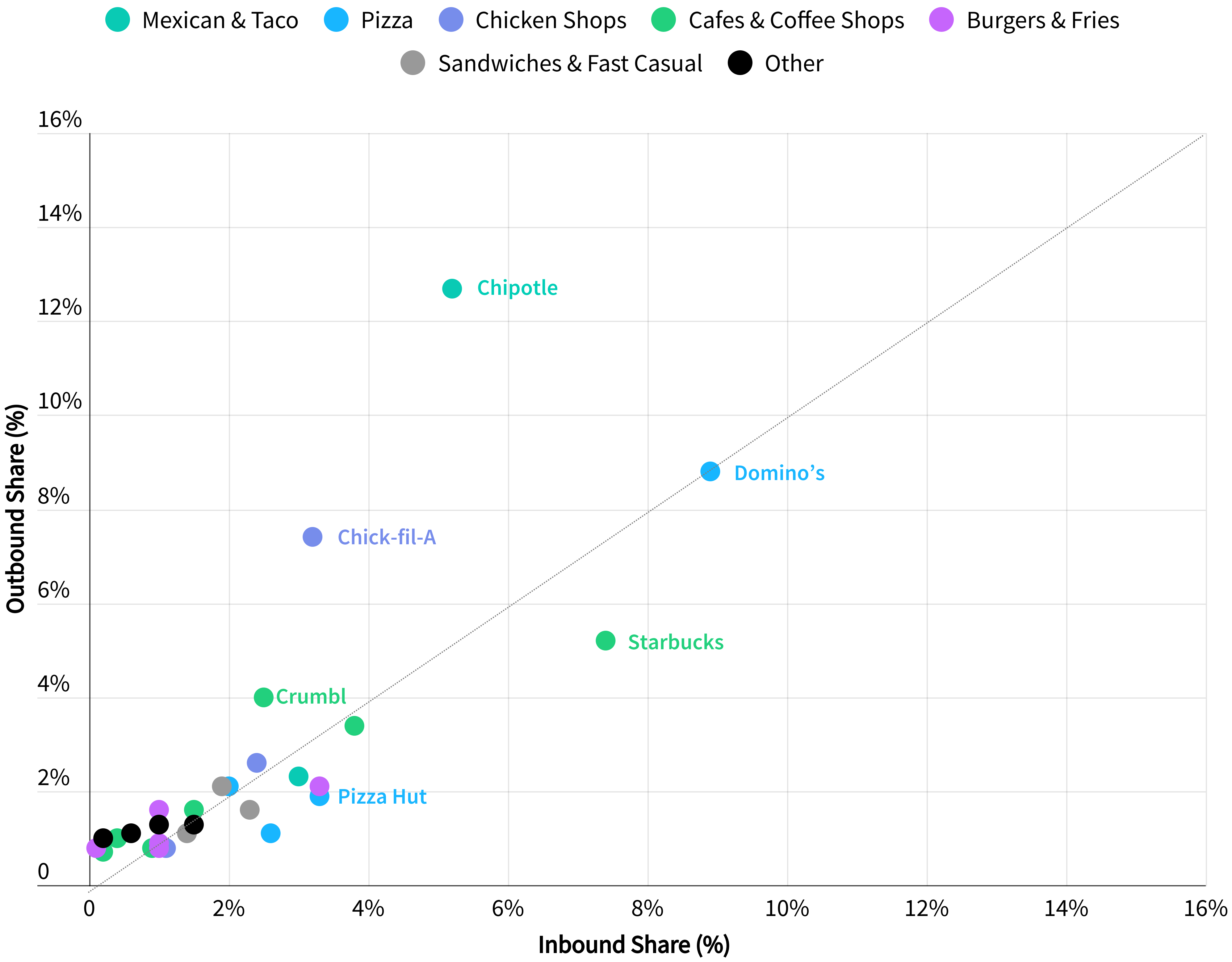


Chipotle and Chick-fil-A Are Winning the Battle for ChatGPT's Traffic

ChatGPT's QSR traffic is not simply mirroring brand size. Chipotle and Chick-fil-A have emerged as the clear post-AI session winners. Chipotle led the sector by capturing 13% of all outbound QSR traffic, a massive over-performance compared to its 5% inbound share. Similarly, Chick-fil-A secured a 7% outbound share despite a modest 3% inbound presence. This indicates that these brands are primary beneficiaries of AI-assisted discovery

In contrast, high-frequency legacy leaders like Starbucks, McDonald's, and Pizza Hut are experiencing a notable "session leak" from ChatGPT. Starbucks's outbound share dropped to 5%, representing a 2ppt decline relative to its inbound volume. McDonald's and Pizza Hut saw similar 1 ppt drops, suggesting that ChatGPT may be less effective as a downstream driver for these brands compared to their existing digital footprints.

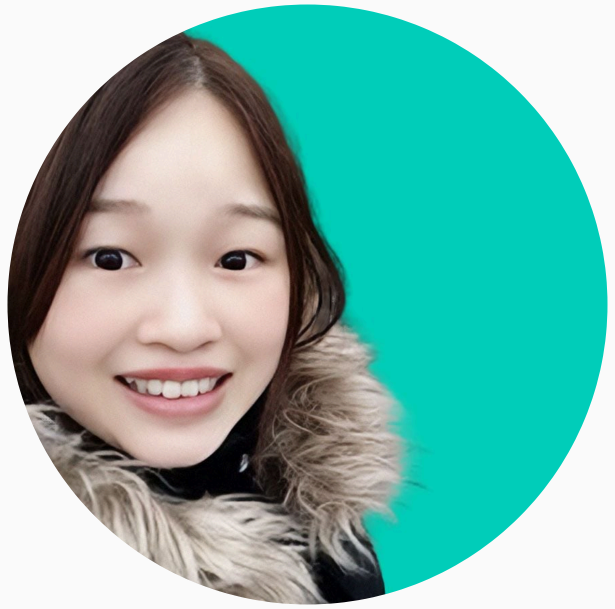
ChatGPT Inbound and Outbound Traffic for QSR Brands
Q1 2026 in the United States



Source: Sensor Tower Web Insights

Sensor Tower

Meet the authors



Yuwen Huang
Senior Market Insights Analyst

Yuwen has been analyzing the digital economy since 2021, specializing in digital advertising and non-game verticals including Retail, Streaming, and Food & Drink. She is the lead analyst for Sensor Tower's reports including the State of Food Delivery & Rideshare and the quarterly Digital Market Index.

Favorite App in 2025: rednote

Jonathan Briskman
Director, Market Insights

Jonathan leads Sensor Tower's Market Insights team, covering trends across the digital economy, from mobile and web to digital advertising. Since 2018, he has helped shape Sensor Tower's market research, including reports such as State of Mobile, State of AI Apps, and State of Digital Advertising.

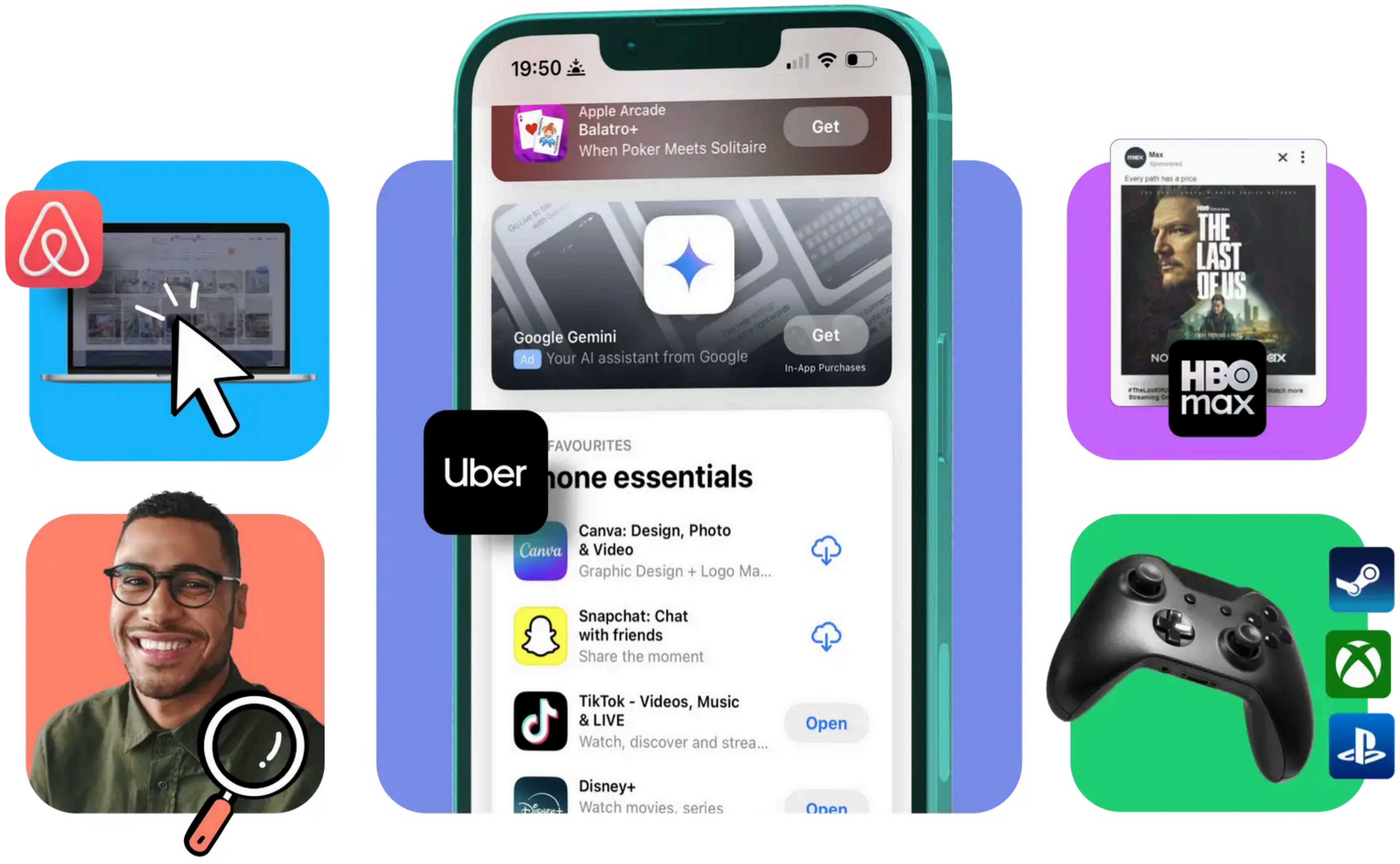
Favorite Website in 2026: fangraphs.com

About Sensor Tower

Sensor Tower is a global provider of digital intelligence solutions, empowering companies to understand consumer behavior and market performance across mobile apps, digital platforms, and gaming ecosystems. Headquartered in San Francisco, Sensor Tower's insights are trusted by more than 2,500 enterprises worldwide.

For more information, visit sensortower.com.

Press Inquiries: press@sensortower.com



Webinar

Join us live on June 3, 2026

3:30 pm ET | 12:30 pm PT

Digital Truth: What Marketers See When Mobile, Web & AI Data Finally Connect

A data-rich look at how to measure true audience reach across mobile and web, where AI-driven referral traffic is gaining ground and what a unified view of the digital consumer journey unlocks for marketers navigating an increasingly fragmented landscape.

Register Now!

Lexi Sydow
Chief Analyst & Founder,
The ATTN Economy,
and Insights Advisor, Sensor Tower

Jonathan Briskman
Director, Market Insights
Sensor Tower

Manuel Oros
Director of Product
Sensor Tower

Sensor Tower

Interested in our Digital Market Insights Solutions?

If you want to learn more about Sensor Tower, please request a demo:

Request a free demo!

Get the latest insights on our blog: **sensortower.com/blog**