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# The Altered States of Search

*How the landscape split in two, where it stands in mid-2026, and what it means for measurement.*

A Wayne Street Digest briefing · June 2026

# 68.01% [1]

*of U.S. Google searches now end without a single click to the open web.*

Up from **60.45% in 2024** — the steepest two-year jump SparkToro has recorded.

**FOR MARKETERS** *The click was the unit of value for twenty years. It is quietly becoming the exception, not the rule.*

*[1] SparkToro / Similarweb clickstream, U.S. Google searches, Jan–Apr 2026 window (sparktoro.com, Jun 2026).*

# All that AI activity sends almost no measurable traffic your way.

**1%** [2]

**of ALL web traffic**

comes from AI platform referrals

**0.2%** [3]

**of traffic to 6,000 publishers**

came from AI search — the other 99.8% did not

**FOR MARKETERS** *Two billion people touch AI answers, yet the traffic you can count from them rounds to zero. That gap is the whole story.*

*[2] Digiday, Dec 2025. [3] Digiday (Raptive network of 6,000 publishers), Apr 2026.*

PART ONE

# Search has split into two systems.

# The card catalog, and the research assistant.

## Traditional search

**The library card catalog.**

Google indexes everything, ranking decides shelf position, and you win by getting the patron to pull your book off the shelf.

*You optimize for the click.*

## Generative search

**The librarian who read every book.**

It gives the patron a spoken summary, occasionally adding “you can read more in this one.” The patron rarely walks to the shelf.

*You optimize to be quoted.*

**FOR MARKETERS** *These two systems now run in parallel. Most strategies are still built entirely for the first one.*

# Google still owns conventional search. That was never the question.

**91%** [4]

**Google global search share**

StatCounter, 2026

**$403B** [5]

**Alphabet 2025 revenue**

up 15% year over year

**$114B** [6]

**Alphabet Q4 2025 revenue**

the business is not shrinking

**FOR MARKETERS** *Do not pitch this as "Google is dying." It is not. What changed is what happens inside a search, not who runs the box.*

*[4] StatCounter, 2026. [5], [6] Digiday (Alphabet earnings), Feb 2026.*

PART TWO

# How we got here: 2024 to now.

# From “eat rocks” to a billion users in twenty-four months.

**May 2024**

### AI Overviews launch

Rolled out at Google I/O after the SGE labs phase.

**Mar 2025**

### AI Mode debuts

A U.S. Search Labs experiment built on Gemini.

**End 2025**

### 75M daily on AI Mode

**75M** [7]

daily active users

**Mid 2026**

### AI Overviews at scale

**2B+** [8]

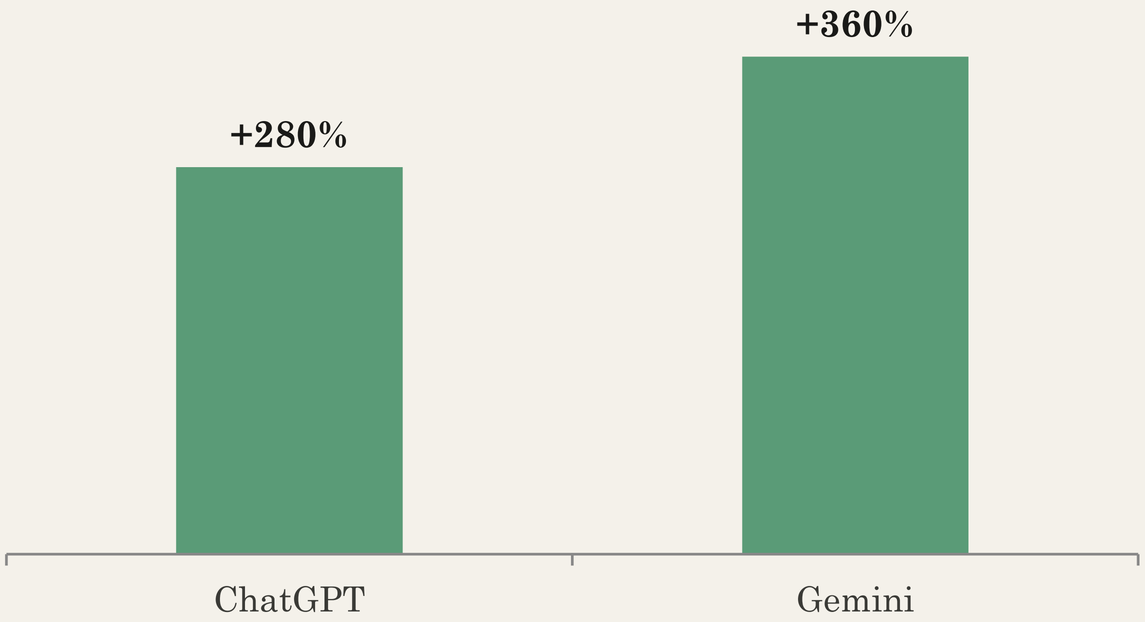
monthly users

**Texture worth noting:** **1 in 6** [9] AI Mode queries are now non-text — voice or image, not typed.

**FOR MARKETERS** *This is the fastest behavior shift search has ever seen. “Wait and see” is itself a decision now.*

*[7], [8], [9] Google, Feb 2026. Launch dates: Google Search blog / public record.*

# ChatGPT leads consumers. Gemini is climbing fastest.




*Year-over-year MAU growth through 2025* [10]

**900M** [11]

**ChatGPT weekly active users**

Adweek, May 2026

**388%** [12]

**Gemini referral-traffic growth**

Sept–Nov 2025 (Similarweb)

**FOR MARKETERS** *Do not bet the strategy on one winner. The leaderboard is reshuffling every quarter — build for the category, not the logo.*

*[10] Digiday / Sensor Tower, Jan 2026. [11] Adweek, May 2026. [12] Digiday / Similarweb, Dec 2025. Growth off small bases; read directionally.*

# ChatGPT's lead is real — and showing its first cracks.

**66%** [13]

**ChatGPT share of U.S.**

AI-chatbot traffic, Nov 2025

**87.4%** [14]

**ChatGPT share of AI**

referral traffic, 10 industries

**+132%** [15]

**ChatGPT uninstalls**

year over year, April

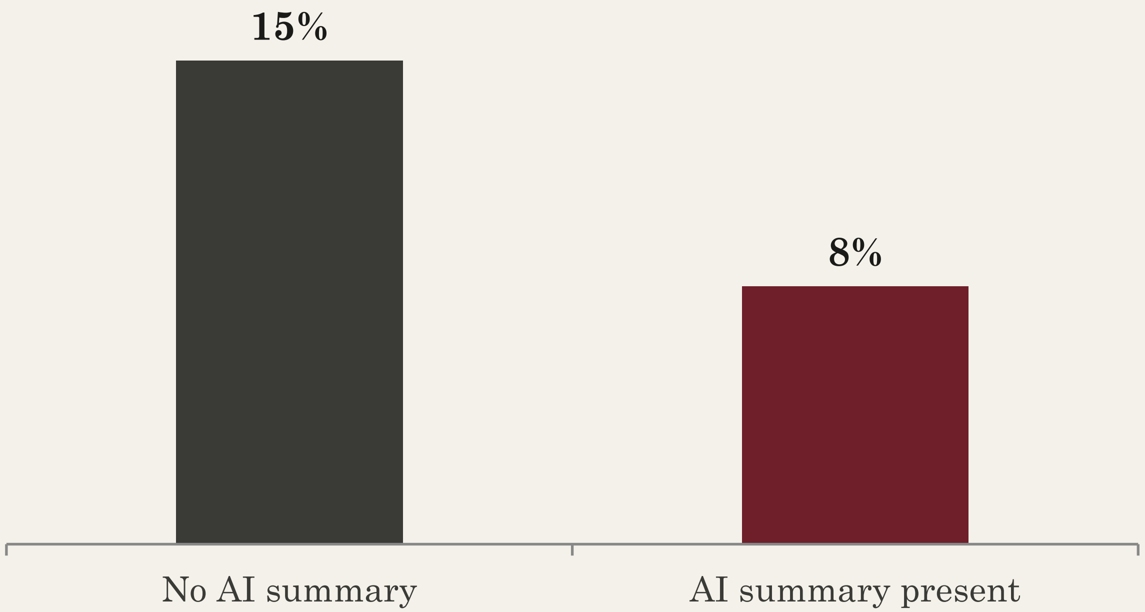
**FOR MARKETERS** *Dominant on usage, but the uninstall spike says loyalty is not locked. Treat platform mix as a moving target.*

*[13] PPC Land, Jan 2026. [14] Digiday / Conductor, Dec 2025. [15] Adweek, May 2026.*

PART THREE

# What people actually do now.

# When an AI answer appears, the click nearly halves.




**Pew Research Center**

**8%** [16] clicked a link when an AI summary appeared, versus 15% without one. Just 1% clicked a link inside the summary.

**Ahrefs**

The #1 organic result loses **58%** [17] of its clicks when an AI Overview is present — up from 34.5% a year earlier.

**FOR MARKETERS** *Ranking #1 no longer guarantees the visit. Being IN the answer is the new front page.*

*[16] Pew Research Center, 900 adults / 68,879 searches, Mar 2025 data. [17] Ahrefs, 300K keywords, Dec 2025 data. Both point-in-time.*

# This is no longer early-adopter behavior.

**52%** [18]

**of U.S. adults**

use generative AI tools like ChatGPT to search

**70%+** [19]

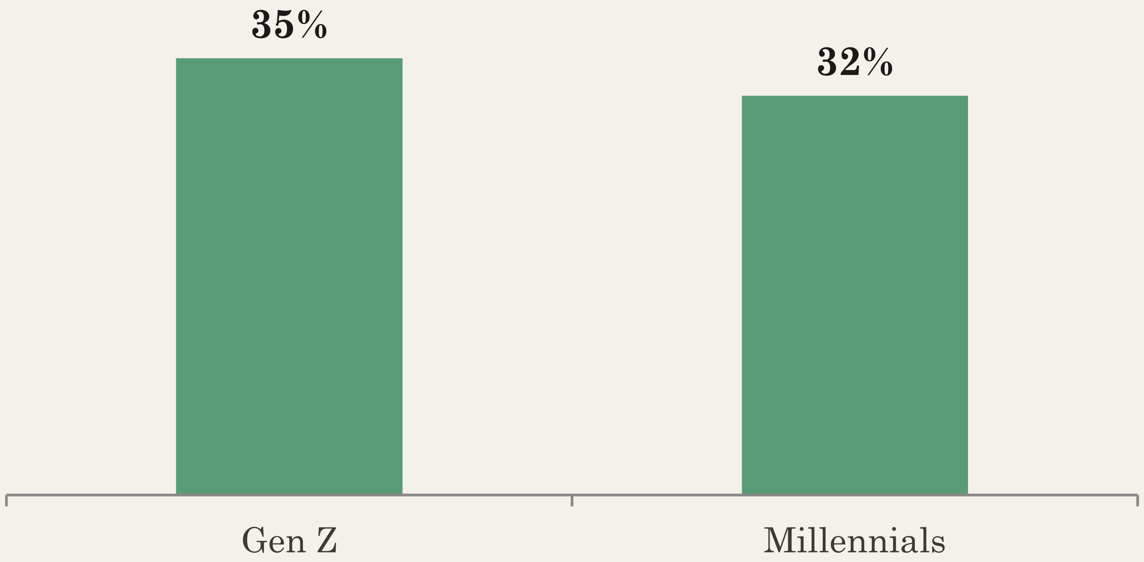
**of ChatGPT messages**

are now non-work, everyday personal tasks

**FOR MARKETERS** *Your customers are already asking an AI about your category. The only question is whether it mentions you.*

*[18] Digiday / Elon University, Mar 2026. [19] Campaignlive, Apr 2026.*

# Product discovery is moving into the chat window.




*Have used ChatGPT to search for products, by cohort* [20]

**40%** [21]

**of Google AI Mode shoppers**

say they now use ChatGPT less — the platforms are actively trading shopping intent

**FOR MARKETERS** *Retail and franchise clients especially: the consideration step is happening before anyone reaches your site.*

*[20] Campaignlive, Apr 2026. [21] Google, Feb 2026.*

# People aren't tolerating AI answers. They prefer them.

**77%** [22]

**make decisions FASTER**

with AI Overviews and AI Mode

**75%** [22]

**make MORE CONFIDENT decisions**

because of them

**FOR MARKETERS** *There is no waiting this out. Users are voting for the summary. Strategy has to assume it wins.*

*[22] Google, Dec 2025 data (self-reported). Vendor-sourced; read as direction, not gospel.*

PART FOUR

# The share-of-search picture.

# Don't draw this as a market-share pie. Draw it as scale vs. reach.

### THE ESTABLISHED SYSTEM

**91%** [4]

Google's share of conventional search. Enormous, profitable, and still growing in revenue.

### THE PARALLEL SYSTEM

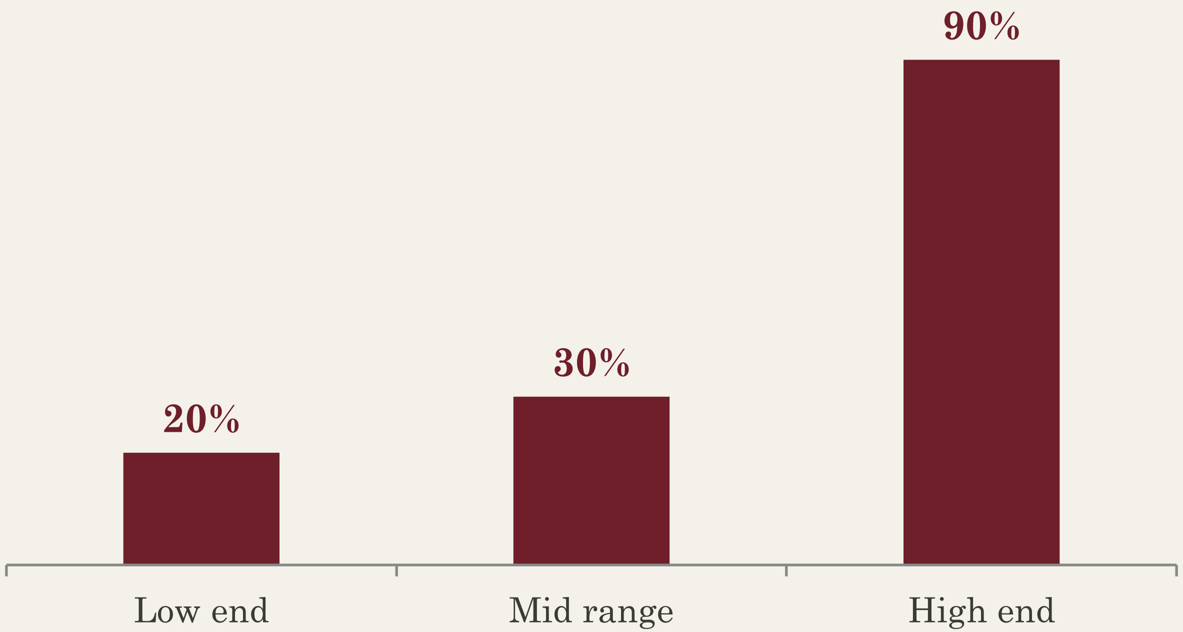
**2B+** [8]

people on AI Overviews, and **52%** [18] of U.S. adults searching via AI. Vast reach — but it sends **1%** [2] of measurable web traffic.

**FOR MARKETERS** *The two systems don't sum to 100%. One owns the clicks; the other owns the attention. You have to measure both.*

*[4] StatCounter, 2026. [8] Google, Feb 2026. [18] Digiday / Elon University, Mar 2026. [2] Digiday, Dec 2025.*

# Publishers are absorbing the cost of zero-click first.




Publishers have been losing **20–90%** [23] of traffic and revenue over the past year to zero-click AI search.

Meanwhile AI sends back **0.2%** [3] of the traffic it displaced. The exchange is not close to even.

**FOR MARKETERS** *If your client's strategy depends on publisher referral or open-web SEO traffic, that ground is moving under them.*

*[23] PPC Land / AdExchanger, Jan 2026. [3] Digiday, Apr 2026.*

# GEO: winning citations inside the answer, not rankings on the page.

**up to 40%** [24]

**visibility boost**

from generative engine optimization

**up to 37%** [25]

**improvement on Perplexity**

from citing sources and adding statistics

**FOR MARKETERS** *The levers that work — cite sources, add statistics, structure for retrieval — are exactly what disciplined, data-backed content already does.*

*[24], [25] Peer-reviewed GEO research (doi.org), Jun 2026.*

# And yet — nobody here is losing money. Hold both ideas.

**$403B** [5]

**Alphabet 2025 revenue**

highest-earning year on record, +15%

**$114B** [6]

**Q4 2025 alone**

the click may be fading, the ad business is not

**FOR MARKETERS** *The honest framing: clicks-per-search are falling while Google's revenue rises. Both are true. Resist the doom pitch.*

*[5], [6] Digiday (Alphabet earnings), Feb 2026.*

PART FIVE

# What this means for measurement.

# Measurement is moving from counting to inferring.

**WHAT WE USED TO COUNT**

Clicks

Sessions

Keyword rankings

*All directly observable.*

→

**WHAT WE NOW INFER**

Did the AI mention us?

How often, and favorably?

Did it drive a visit we can't see?

*Probabilistic, not observable.*

**FOR MARKETERS** *Every click-based dashboard now measures a shrinking slice of reality. That's the problem worth solving.*

# 87% [26]

*of marketing chiefs say their board or CEO has asked them to create an AI-search response strategy.*

**FOR MARKETERS** *The mandate already exists at your prospects' board level. What's missing is someone who can actually instrument it.*

*[26] Digiday / Brandlight survey of 500 CMOs (Censuswide), Mar 2026.*

# The instruments haven't caught up to the behavior.

**45%** [27]

**of U.S. marketers**

cite attribution & measurement as a top barrier

**87%** [28]

**misattribution rate**

in current measurement (CIMM / ARF)

**0.91%** [29]

**CTR in early ChatGPT**

ad pilot — the paid model is unproven too

**FOR MARKETERS** *The gap between what's happening and what's measurable is not a footnote. It IS the engagement.*

*[27] VIOOH / MTM, Jun 2026. [28] CIMM / ARF, Jun 2026. [29] Digiday / Adthena, Mar 2026.*

# Three metrics every measurement leader needs by Q3.

## Share of Voice

How often your brand appears across a tracked set of AI prompts, versus competitors. The new "share of search."

## Citation Share

How often your domain is actually cited as a source — distinct from being mentioned by name without a link.

## Share of Answer

How much of the answer you own — weighted by prominence, frequency, and sentiment, not just presence.

**FOR MARKETERS** *These aren't vanity metrics. They're the only way to report progress in a channel where clicks have gone dark.*

*Framework synthesized from corpus measurement sources and the Wayne Street field guide. Concept slide — no single-source figure.*

# What a measurement leader does in the next ninety days.

| | | |
|---|---|---|
| 01 | **Fix attribution first** | Stand up an AI-traffic channel in GA4, tag owned content with UTMs, and report AI traffic as a floor, not a ceiling. |
| 02 | **Baseline visibility** | Define your top 30–50 buyer questions and measure how often you appear across ChatGPT, Gemini, Perplexity, and AI Overviews. |
| 03 | **Adopt the right KPI** | Report visibility frequency and share of voice — never "AI rank," which is statistical noise across repeated prompts. |

**FOR MARKETERS** *None of this requires new budget — it requires someone whose explicit job is to own the channel. Today that's usually nobody.*

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# The click is no longer the unit of value. Someone has to re-instrument the work.

*Wayne Street suggests the measurement layer for this shift — share-of-voice baselining, AI-citation tracking, and attribution that survives the dark-traffic gap — run as one accountable program. Every figure sourced. Nothing that can't be cited.*

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# Sources

*Every figure in this deck, numbered in the order it appears. Full source and date for each.*


**[1]** Zero-click U.S. Google searches (68.01%, up from 60.45% in 2024) — SparkToro / Similarweb, Jun 2026 (Jan–Apr 2026 window)
**[2]** AI referral traffic as share of all web traffic (1%) — Digiday, Dec 2025
**[3]** AI vs non-AI traffic to 6,000 publishers (0.2% / 99.8%) — Digiday / Raptive, Apr 2026
**[4]** Google global search market share (91%) — StatCounter, 2026
**[5]** Alphabet 2025 revenue ($403B, +15%) — Digiday, Feb 2026
**[6]** Alphabet Q4 2025 revenue ($114B) — Digiday, Feb 2026
**[7]** AI Mode daily active users in Search (75M, end 2025) — Google, Feb 2026
**[8]** AI Overviews monthly users (2B+) — Google / Digiday, Feb 2026
**[9]** AI Mode non-text queries (1 in 6) — Google, Feb 2026
**[10]** ChatGPT / Gemini MAU growth (280% / 360%) — Digiday / Sensor Tower, Jan 2026
**[11]** ChatGPT weekly active users (900M) — Adweek, May 2026
**[12]** Gemini referral-traffic growth (388%, Sep–Nov 2025) — Digiday / Similarweb, Dec 2025
**[13]** ChatGPT share of U.S. AI-chatbot traffic (66%, Nov 2025) — PPC Land, Jan 2026
**[14]** ChatGPT share of AI referral traffic (87.4%) — Digiday / Conductor, Dec 2025
**[15]** ChatGPT uninstalls growth (+132% YoY) — Adweek, May 2026
**[16]** Click rate with vs without an AI summary (8% vs 15%; 1% in-summary) — Pew Research Center, 900 adults / 68,879 searches, Mar 2025 data
**[17]** #1 organic result CTR loss under an AI Overview (58%, up from 34.5%) — Ahrefs, 300K keywords, Dec 2025 data
**[18]** U.S. adults using generative AI for search (52%) — Digiday / Elon University, Mar 2026
**[19]** ChatGPT messages that are non-work (70%+) — Campaignlive, Apr 2026
**[20]** Gen Z / Millennials using ChatGPT for product search (35% / 32%) — Campaignlive, Apr 2026
**[21]** Google AI Mode shoppers using ChatGPT less (40%) — Google, Feb 2026
**[22]** Users deciding faster / more confidently (77% / 75%) — Google, Dec 2025 data
**[23]** Publisher traffic & revenue loss (20–90%) — PPC Land / AdExchanger, Jan 2026
**[24]** GEO visibility boost (up to 40%) — peer-reviewed GEO research (doi.org), 2026
**[25]** GEO improvement on Perplexity (up to 37%) — doi.org, 2026
**[26]** Marketing chiefs asked for an AI-search strategy (87%) — Digiday / Brandlight (Censuswide, 500 CMOs), Mar 2026
**[27]** Marketers citing attribution as a barrier (45%) — VIOOH / MTM, Jun 2026
**[28]** Misattribution rate (87%) — CIMM / ARF, Jun 2026
**[29]** CTR in early ChatGPT ad pilot (0.91%) — Digiday / Adthena, Mar 2026


## READ BEFORE QUOTING

**Point-in-time:** [16] (Pew, Mar 2025) and [17] (Ahrefs, Dec 2025) are the category's most-cited primary studies but are not mid-2026 fresh; re-check before external use. **Scope:** [1] is U.S. Google only, Jan–Apr 2026 window. **Vendor-sourced:** [22] and several growth figures are self-reported; directionally sound, precise multipliers are not load-bearing.