Previsible™

2026 State of AI Discovery Report

What 6.77 Million LLM Sessions Tell Us About the Future of Search

By David Bell

Chief Product Officer

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What 6.77 Million LLM Sessions Tell Us About the Future of Search

Learn How The AI Discovery Market Is Consolidating, Which Challengers Are Gaining Ground, And What It Means For SEO And Marketing Strategy.

By David Bell, *Chief Product Officer, Previsible*

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Previsible analyzed 166 GA4 properties from November 2024 through May 2026, spanning websites across SaaS, e-commerce, finance, legal, health, insurance, education, publishing, and ticketing. This analysis reflects LLM search behavior and product change over time.

In sum, we evaluated 6.77 million LLM-driven sessions and uncovered 9.9x growth in 19 months. 92.4% of it comes from ChatGPT.

This is the largest AI traffic study we have ever published, measuring referral traffic from standalone LLM platforms. The data tells a consolidation story. ChatGPT is transforming AI discovery, and the platforms gaining ground now are not the ones the industry bet on 12 months ago.

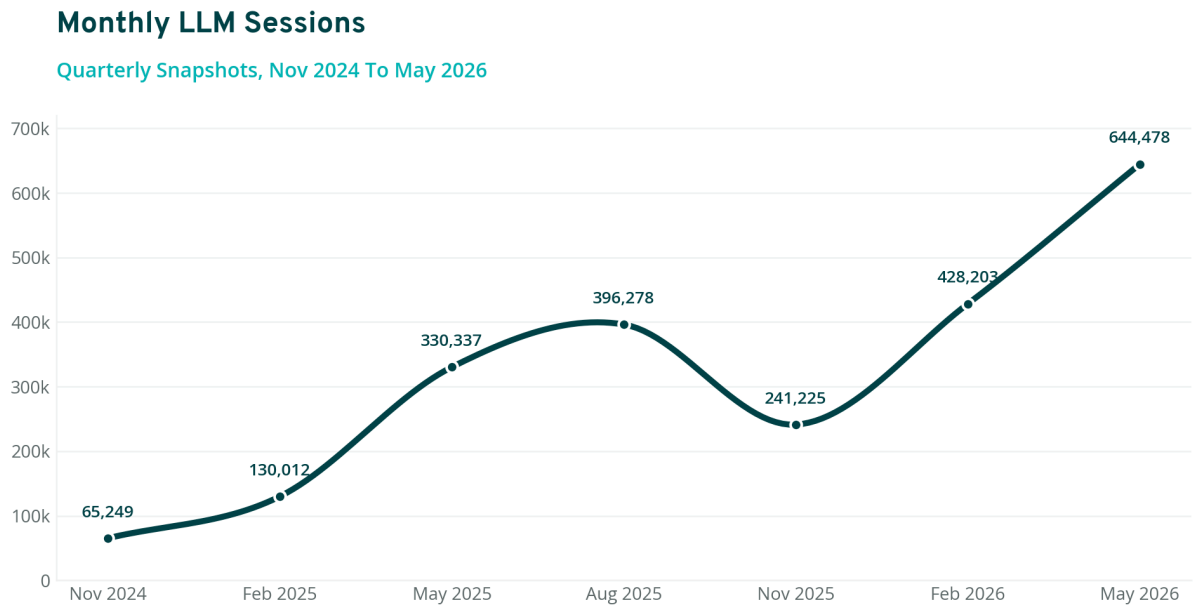
Important context: AI discovery happening inside Google's own results, including AI Overviews, almost certainly represents a larger volume of AI-driven traffic than all standalone LLM platforms combined. We exclude AI Overviews from this study because they operate on a fundamentally different measurement paradigm. They do not generate trackable referral sessions the same way standalone platforms do. This report measures standalone LLM referral traffic specifically, and ChatGPT's leadership applies within that frame.

Key Findings

- ChatGPT commands 92.4% of all trackable LLM referral traffic and is still gaining relative share.
- Claude grew 64x over the tracked timeframe and overtook Perplexity in March 2026.
- Gemini is the steady #2, growing 3.2x since November 2024 with consistent momentum.
- Perplexity peaked in March 2025 and is down 61% since. Copilot moved 96% below its August 2025 peak.
- Monthly LLM sessions reached 644,478 in May 2026, a 9.9x increase from November 2024.

AI Traffic Is Accelerating

In mid-2025, AI traffic seemed to be peaking for some sectors like SaaS. It turned out to be a pause on the way to new highs.



Monthly LLM Sessions, Quarterly Snapshots, Nov 2024 To May 2026

From November 2024 to May 2026, total monthly AI-referred sessions grew 9.9x.

The November 2025 change requires context. Monthly sessions moved down 50% in a single month, driven almost entirely by a shift in ChatGPT referrals (448,412 in October to 213,345 in November). Other platforms remained stable.

This was likely a model-related change. We have seen that modest tweaks can meaningfully shift referral traffic, as documented by Search Engine Land last fall. Many sites saw a 50% change in traffic as ChatGPT preferred Wikipedia and Reddit.

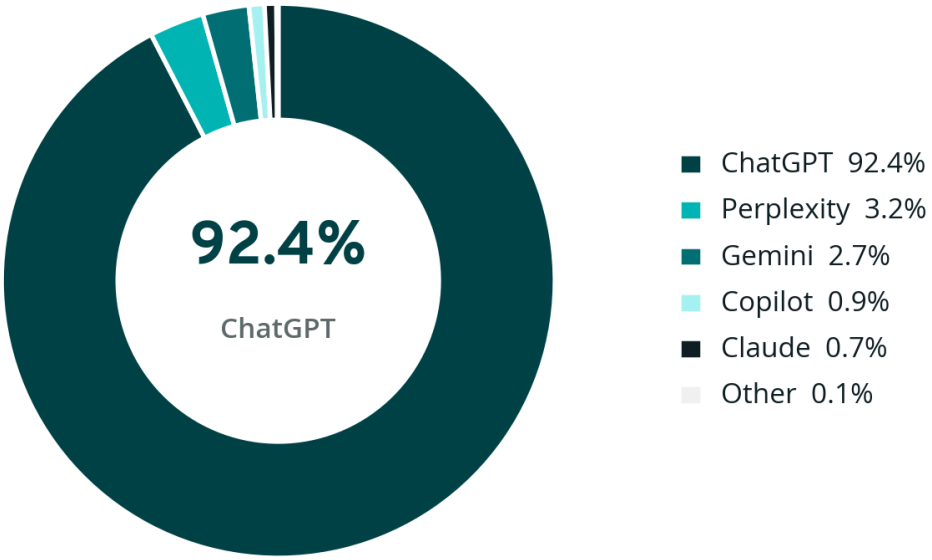
Whether this reflects an OpenAI product change or a seasonal user behavior shift is not yet clear without more detail from OpenAI. Sessions recovered to 442,609 in December 2025.

The message is clear. Search is becoming more like the LLM chat experience, and LLMs are increasingly capturing more searches. Based on conversations we had with engineers at Google I/O, it is full speed ahead to an AI search future. The mix of that traffic, how it refers to publisher sites, and where to invest are what matter now.

Platform Market Share: A Consolidation Story

The last time we looked at the data in December 2025, ChatGPT was at roughly 84%, followed by Perplexity (8.9%), Gemini (4.5%), Copilot (2.1%), and Claude (0.6%). Since then, Perplexity and Copilot have moved lower, and ChatGPT has taken more share of AI traffic. This report measures standalone LLM referral traffic specifically. AI Overviews are excluded.

Total Sessions By Source, Nov 2024 To May 2026



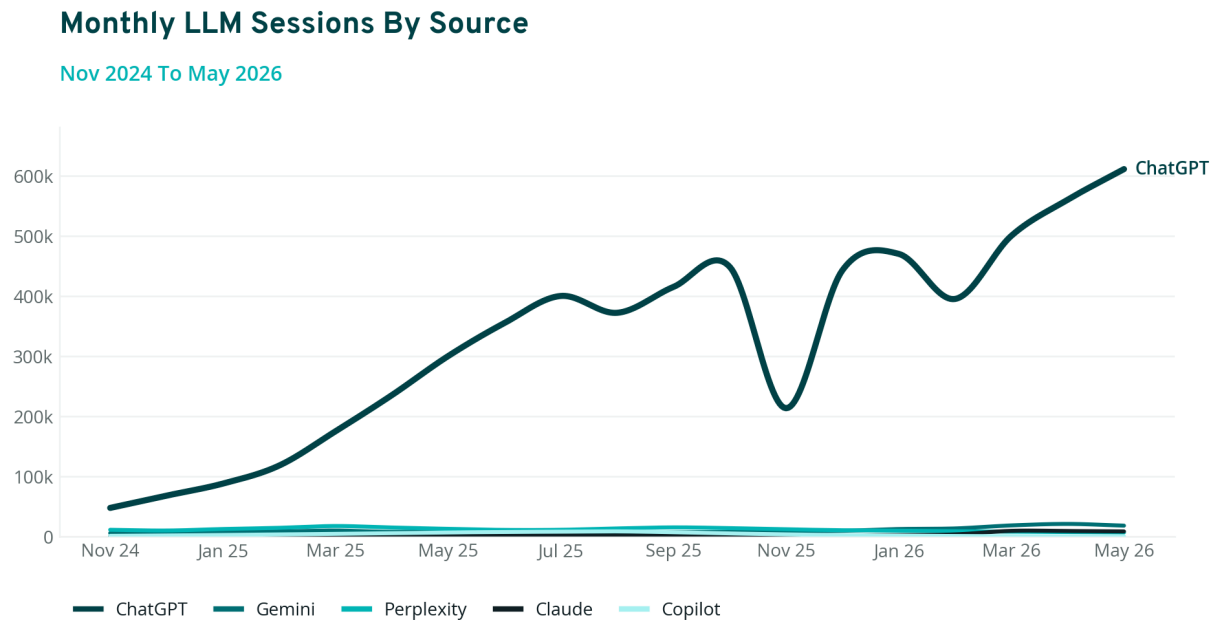
AI Source Share, Total Sessions By Source, Nov 2024 To May 2026

Note: Meta.ai sent nearly zero traffic.

This average over 19 months smooths out some ups and downs to create digestible market insights. What it misses are entire product life cycles, representing billions in investment, trial, and error over a busy 19 months. What we look at next is the month-to-month trajectory, which tells a more important story.

ChatGPT: 92.4% Share And Still Pulling Away

47,606 sessions in November 2024 became 610,910 by May 2026. That is 12.8x growth over 19 months with no sign of slowing. ChatGPT is the market leader across most industries and page types, and it is the only LLM sending meaningful referral traffic.



Monthly LLM Sessions By Source, Nov 2024 To May 2026

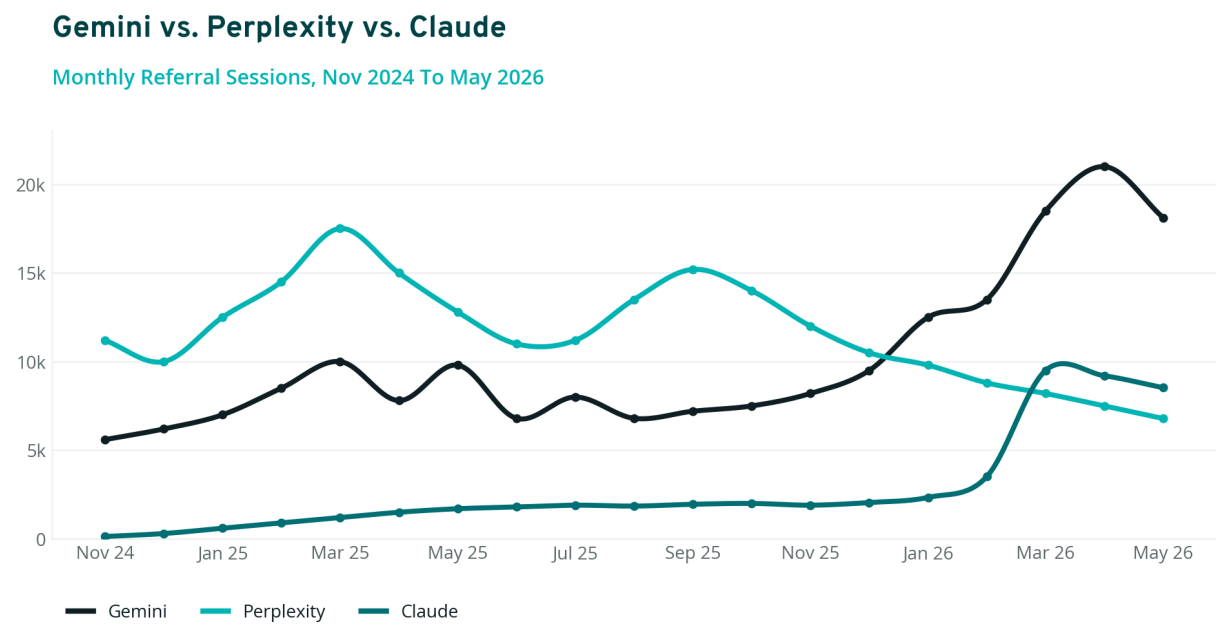
ChatGPT is the AI discovery surface that matters right now. Optimizing for AI visibility without prioritizing ChatGPT is optimizing for an abstraction.

Claude Grew 64x And Overtook Perplexity In March

Claude took longer to allow web search, releasing in March 2025. That may be part of the reason why, according to Cloudflare, it is 30,000 times harder to get a visit from Claude versus traditional Google Search.

This traffic is precious and growing. In November of 2024, we saw only 133 sessions. Last month in May, it had grown by 64x to 8,528. While mostly flat through 2025, hovering between 1,700 and 2,000 monthly sessions, traffic jumped in January to 2,340, then 3,514 in February, and 9,501 by March: a 4x acceleration in two months.

It is clear that Anthropic's second mover advantage is paying off. They focused on product and stayed with their principles, and it is paying off.



Gemini vs. Perplexity vs. Claude, Monthly Referral Sessions, Nov 2024 To May 2026

In March 2026, Claude surpassed Perplexity in monthly referral sessions for the first time and has stayed ahead.

Claude's growth correlates with its expansion into agentic coding tools, professional workflows, and enterprise adoption. The enterprise advantage that the industry expected Copilot would win may be materializing for Claude instead, likely because Claude's integration points (Claude Code and Claude Cowork) are increasing rapidly in popularity.

Claude is now a measurable factor. If your audience includes technical buyers, developers, or professional services, Claude visibility is becoming real, and the window for early positioning is now.

Gemini Grew 3.2x With Steady Consistency

Starting at 5,598 sessions in November 2024 and ending at 18,119 in May 2026, Gemini has grown steadily to take over the #2 spot.

Gemini's integration into Google Workspace and Android means its actual discovery footprint likely extends beyond what referral tracking captures. What we measure here may undercount Gemini's real influence on how users find and evaluate brands.

According to Google's VP of Search Liz Reid, Google Search is AI Search. Gemini and Google search are collapsing into a similar experience where you can start in the search bar, transition into Gemini conversation, interact with inventory from your website, and use their Universal Cart Protocol to buy. If that model scales, referral traffic becomes secondary to inventory integration. Closed ecosystems have been attempted many times and rarely succeed long-term. Whether Google can sustain this model while keeping merchants and publishers engaged remains an open question.

Gemini is durable. Its steady trajectory and Workspace and Android integration suggest the referral numbers undercount its real discovery footprint. It is the model to watch as Google continues to push new features like Spark and Search Agents that are designed to capture more modalities.

Perplexity And Copilot: Shifting Toward Retention

Perplexity showed early promise as a lasting LLM for search discoverability. Based on what we are seeing, Perplexity peaked at 17,507 monthly sessions in March 2025 and, by May 2026, moved to 6,788. That is a 61% change.

Like its peers, Perplexity is shifting toward retaining users within the Perplexity experience through its browser and agentic experiences. In these modes, they do not need to send you traffic because you are receiving it as a browser or as an agent. You may see more Perplexity traffic coming by way of GA4's new AI-Assistant Medium (see our free Data Studio Report to track for your site).

GA4 AI-Assistant Medium

SOURCE / MEDIUM	SESSIONS	USERS	BOUNCE RATE
chatgpt.com / ai-assistant	1,421	1,316	61.51%
gemini.google.com / ai-assistant	46	31	63.04%
claude.ai / ai-assistant	8	3	87.50%
copilot.com / ai-assistant	6	5	50.00%
perplexity.ai / ai-assistant	3	3	66.67%
poe.com / ai-assistant	1	1	0.00%

Top Traffic Sources, GA4 AI-Assistant Medium, Sessions

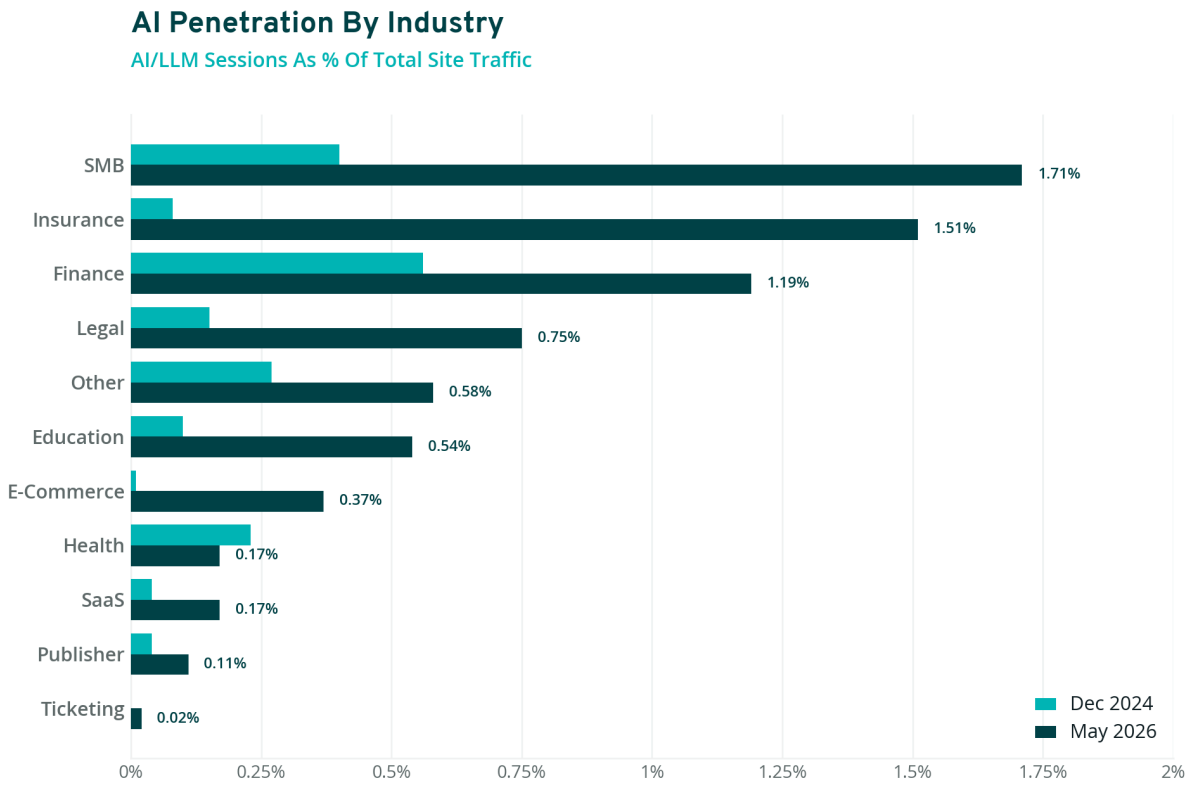
Copilot's path is steeper. It peaked at 8,651 sessions in August 2025, then moved to 339 by May 2026, a 96% change. In our prior report, we highlighted Copilot's rapid growth as evidence that workplace-embedded AI discovery was arriving through Microsoft Office. That growth proved to be a short spike rather than a trajectory. Copilot adoption faces more pressure now that the pricing model is changing. Microsoft is even looking at switching to Deepseek as a potential cost-saving measure.

Neither Perplexity nor Copilot is a growth bet for traffic acquisition today. Perplexity's value may persist in specific niches (see Model Personalities below), while broad optimization for either has diminishing returns.

Industry Penetration: Where AI Traffic Concentrates

Traffic from LLMs is not evenly distributed across industries. We wanted to better understand this by looking at the percentage of a vertical's total traffic coming from LLMs.

Across the dataset, LLM traffic represents a fraction of total sessions. By drilling into this penetration view, we can make better decisions about when and where to invest. For example, there has been a contraction in LLM traffic in the health space and a consolidation around branded content. That might lead to building out authority signals like PR and focusing on consistency signals to LLMs. Let us take a deeper look at each industry.



AI Penetration By Industry, AI/LLM Sessions As % Of Total Site Traffic, Dec 2024 vs. May 2026

The fastest-growing verticals started from the smallest bases. E-Commerce grew 37x from near zero. Users now ask LLMs for product recommendations and land on product pages with purchase intent already formed. Insurance grew 18.9x to 1.51% penetration, the highest current rate of any vertical. Education grew 5.4x, consistent with LLMs' strength in synthesizing multi-step learning queries.

SMB and Finance tell a different story of moderate growth from higher starting points. Finance started at 0.56% and reached 1.19%. SMB started at 0.4% and reached 1.71%. These verticals adopted AI discovery earlier and are now in steady accumulation rather than explosive acceleration.

Health is the vertical where AI penetration moved down, from 0.23% to 0.17%. E-Commerce AI traffic is almost entirely ChatGPT, and no other model sends meaningful referral volume to e-commerce properties.

Page Type By Vertical: AI Discovery Intent Varies More Than You Think

Where LLM traffic lands reveals what users are asking AI to help them do. Where it lands depends entirely on the vertical. The aggregate view tells a tidy story about a shift from information to commerce. The vertical-level view tells ten different stories. That is the one that matters.

- **SaaS: Search Pages Dominate (34.6%).** ChatGPT trusts the domain but often approximates the page, so it sends the user to your internal search result page. Sites with strong search UX convert these sessions. Sites building that experience capture high-intent visitors at the front door.
- **Publisher: News Pages Capture 54% Of LLM Referrals.** Against 120 million-plus organic sessions, penetration is 0.08%. Publishers produce the content LLMs train on and cite, and there is meaningful headroom to capture more of the resulting traffic.
- **E-Commerce: Product Pages Are The Primary Landing Surface.** AI traffic is almost entirely ChatGPT, and users arrive with purchase intent already formed. Structured, comparable product data is an AI discoverability requirement, not just a conversion optimization play. Learn More About The Best Way To Segment A Catalog For AI Platforms.
- **Education: Course Pages Are The Entry Point (52%).** Users ask LLMs where they can learn X and land directly on course content, moving past blogs, guides, and marketing pages.
- **Financial Services (Finance And Insurance): Blog Content Leads, While Location And Conversion Pages Reveal Intent.** Blogs capture the largest share of LLM traffic, and location pages represent bottom-of-funnel, offline-conversion intent arriving through an AI channel. Conversion pages such as enrollment, signup, and product entry points show some of the highest per-page AI density in the dataset, with LLM-to-total ratios above 2%.

- **Health: About Pages Serve As Signals (42.1%).** When users ask an LLM a health question and get directed to a site, their first action is to evaluate the source. About pages serve as a credibility checkpoint. More From John Vantine At GoodRX On AI-Driven Strategies.
- **Legal: The Most Evenly Distributed Spread.** Blog (28.2%), About (12.3%), Contact (11.7%), and Location (10.3%) each take a meaningful share. LLMs route users through the full evaluation arc of practice areas, credentials, and contact.
- **Ticketing: Search (20.8%) and Home (18.5%) Split The Lead.** Lighter overall penetration and traffic to the home page suggest LLMs handle basic event discovery rather than deep evaluation.

Model Personalities: How Each Platform Sends Traffic Differently

The aggregate market share data obscures meaningful behavioral differences between platforms. Each LLM routes traffic to different page types, revealing distinct personalities in how they handle discovery. These differences have practical implications for where you invest.

Search-Pattern Models (ChatGPT, Gemini): Domain Trust With Page-Level Approximation

ChatGPT and Gemini share similar patterns in how they refer traffic. They trust domains broadly and approximate at the page level. ChatGPT sends 28.8% of its traffic to internal search pages. It names the brand and often approximates the page. Gemini does the same, routing users to search infrastructure and topical hubs rather than guessing at a specific URL. This may be the most actionable finding in the study. Unlike market share percentages, which shift with every model update, the pattern of LLMs trusting domains while approximating page-level specificity appears structural. It persists across verticals and time periods in our data, suggesting it reflects how retrieval-augmented generation works rather than a temporary product quirk. Both models meet the intent and sometimes approximate the best page to link to. They acknowledge domain authority and let the user navigate from there. ChatGPT's second-largest concentration is product pages, consistent with its strength on commercial queries. Gemini's pattern is steadier and less commerce-oriented.

With this in mind, you can think of your internal search experience as an acquisition tool. The model did the hard work of selecting your domain. Your search UX determines whether that visit converts, and whether you answer your own customer's questions or a competitor does. Navigation matters

just as much. Clear site architecture, logical menus, and prominent internal linking help both users and LLMs find the right page. It also points to a real opportunity in your documentation and forum content. Here are some examples we have seen.

- **Documentation Search:** How Do Webhooks Work In HubSpot?
- **Community And Forum Search:** Has Anyone Solved Salesforce Duplicate Lead Issues?
- **Release Notes And Changelog Search:** Did Asana Recently Add AI Features?
- **Product Search:** I Need A Non-AI Stock Image Of Fruit On A Table.

Content-Selection Models (Perplexity, Claude): Page-Level Precision And Long-Form Affinity

Perplexity and Claude pick specific pages. Perplexity over-indexes on blog and long-form content, with 13% of its classified traffic landing on blog pages, compared with 8.7% in the overall mix. Perplexity treats blog posts, guides, and editorial content as primary sources in ways the search-pattern models do not. Claude skews even further toward educational content like guides, courses, and research-oriented pages. Claude users engage with longer-form content at higher rates than any other platform's referrals.

For publishers and content-forward brands, these models deliver smaller volume and higher-quality referrals to the content they have invested most in producing. If your strategy depends on long-form content driving qualified traffic, Perplexity and Claude visibility matter disproportionately to their market share.

What SEO And Marketing Teams Should Do Now

1. Optimize For ChatGPT First

As the number one referrer of AI search, build your AI visibility strategy around ChatGPT. Expand to other platforms as their volume justifies the investment.

2. Monitor Claude

Claude overtook Perplexity in March. If your audience includes developers, technical buyers, or professional services, Claude visibility is material now, not speculative. Early positioning creates compounding advantages.

3. Treat Product Pages As AI Entry Points

Product pages now capture 43% of all e-commerce LLM traffic. Users arrive with purchase intent formed. Structured, comparable product data across PDPs is no longer just a conversion rate optimization play. It is an AI discoverability requirement. If your product data is clean, scannable, and comparison-ready, you are visible to the fastest-growing discovery channel. Apple is a great example of strong UX with LLM-friendly content.

4. Make Pricing Transparent And Easily Digestible For AI Systems

The case for transparent pricing is no longer just that buyers like it. It is now an AI visibility issue. Gartner says most B2B buyers prefer rep-free buying experiences. G2 is actively moving toward exposing software price ranges because buyers need them to compare and build internal cases. Google's structured data guidance shows that pricing is a machine-readable surface, not just a sales artifact. Contact us for pricing, which may protect sales process control, and publishing pricing gives AI systems more to summarize, compare, and recommend.

5. Prioritize Search Experiences

AI-referred traffic lands on internal search results pages roughly 25% of the time across all industries. Your internal search experience is now an acquisition tool, not just a navigation feature. If users land on your search page from an LLM and find strong results, you keep a highly engaged user that an AI specifically sent to you.

6. Track AI Traffic By Page Type, Not Site-Wide

Your overall AI penetration rate may be 0.25%. Your pricing page might be 3x that. Your product pages might be 5x. Your site-wide average hides where AI traffic actually concentrates. Measure by page type. You can use this free Looker Report that tracks LLM traffic and AI Assistants.

Our Next Insights

Volume and penetration tell you where LLMs send users. They do not tell you what those users are worth.

Conversion rate by LLM platform is the single most valuable open question in AI discovery. Which platforms send users who buy? Which send users who browse? Does a ChatGPT referral convert better or worse than a Google click? Does a Perplexity referral to a blog post lead to pipeline at the same rate as a ChatGPT referral to a product page?

We built this dataset to answer those specific questions. If the last 19 months are any indication, the answers will change faster than most teams are ready for.

Track LLM updates at previsible.io/ai-seo-benchmark.

Methodology

This is the third Previsible AI Traffic Study. The dataset spans November 2024 through May 2026, 19 months, across 166 GA4 properties in SaaS, e-commerce, finance, legal, health, insurance, education, publishing, events, and SMB.

The property pool is subject to change between studies. Absolute figures should not be compared directly across Previsible reports without accounting for differences in sample composition and size. All 166 properties in this study are present for the full 19-month observation window, so trajectory analysis within this report reflects behavioral change, not sample expansion.

AI penetration rate is calculated as (LLM Sessions divided by Total Sessions) times 100. It can be measured site-wide, by industry, or by page type. Sessions follow the GA4 default definition of a 30-minute inactivity timeout. LLM sources tracked include chatgpt.com, perplexity.ai, gemini.google.com, copilot.microsoft.com, claude.ai, grok.com, you.com, and meta.ai, along with associated subdomain and app-referral variants captured in GA4.