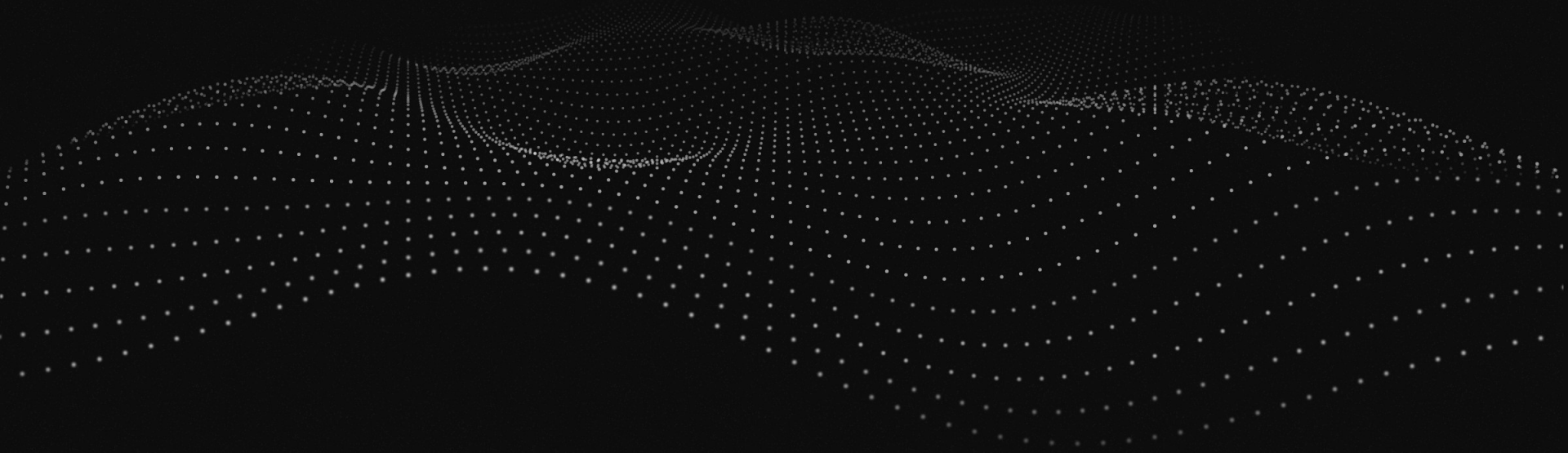
GRAPHITE

NOV 9, 2026

The State of Gen AI



Summary

01 The top 6 LLMs (ChatGPT, Gemini, Claude, Grok, Perplexity, DeepSeek) now drive 76B sessions a month worldwide, and YoY growth has hit 37% worldwide and 45% in the US.

02 Claude has the largest relative growth, with +1901% worldwide and +862% in the US. However, ChatGPT still has an 81.2% share worldwide and 80.7% in the US.

03 ChatGPT recently announced 1.2B weekly active users.

04 Despite the growth of Claude, ChatGPT has regained market share worldwide since June 2026, increasing it by +0.8 percentage points from June to September.

05 AI hit a surprising and little-reported plateau between July and December 2025 worldwide, growing only 2.3%, while the US grew 10% over the same window.

06 Growth has since rebounded, with a 19% increase since January 2026 worldwide and 20% in the US.

07 86% of AI usage worldwide happens in-app, 74% in the US. Adding mobile web takes it to 89% worldwide and 78% in the US.

08 Referral traffic from AI continues to climb, with 92% YoY growth worldwide. ChatGPT owns 60% of referral traffic, followed by Gemini at 14%, and Claude at 10%.

09 Google Search continues to grow and converge with AI, with 64% of Google Searches showing AI Overviews.

10 This is an updated version of our previous study, "AI Is Much Bigger Than You Think" published in March 2026. We share new data and compare it against our previous study.

THE REPORT

01 Key Findings

02 The AI Adoption Curve

03 Growth by AI Product

04 Referral Traffic

05 The AI Attribution Gap

06 Growth By Region

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Our Researchers

Graphite's team of academic researchers conducts novel research in AI and marketing. Their research has been featured in Nature, ACM, IEEE, New York Times, Financial Times, and Axios. Their team of over 140 people across 15 countries identifies the 5% of strategies that drive impact in AEO, SEO & paid media.



Ethan Smith

CEO

Ethan Smith is CEO of Graphite.io, a research-driven growth agency that works with companies like Webflow, Adobe, and Upwork. He is an adjunct professor at IE Business School and teaches SEO and AEO at Reforge. His research has been published in ACM, Axios, Financial Times, and The Atlantic. Prior to founding Graphite, Ethan was a growth advisor to Masterclass, Robinhood, and Honey. Ethan was a research assistant focused on human-computer interaction and psychology at UC Santa Barbara and University College London.

LINKEDIN →



José Luis Paredes, PhD

SENIOR DATA SCIENTIST

José L. Paredes is a Senior Data Scientist at Graphite specializing in machine learning, robust signal processing, and time-series analysis. He holds a Ph.D. and a Master's in Electrical Engineering from the University of Delaware, where he also completed postdoctoral studies, and was a professor at the University of Los Andes for over two decades. He has authored more than 50 research papers and five book chapters and holds six U.S. patents. An IEEE Senior Member, he received the 2006 ISA Transactions Best Paper Award and led several funded research projects. He served as Head of Data Science at GoToDigital.

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PRESS

Our Research Are Featured In























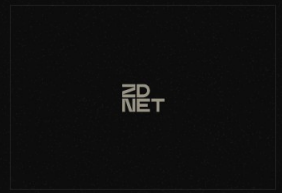












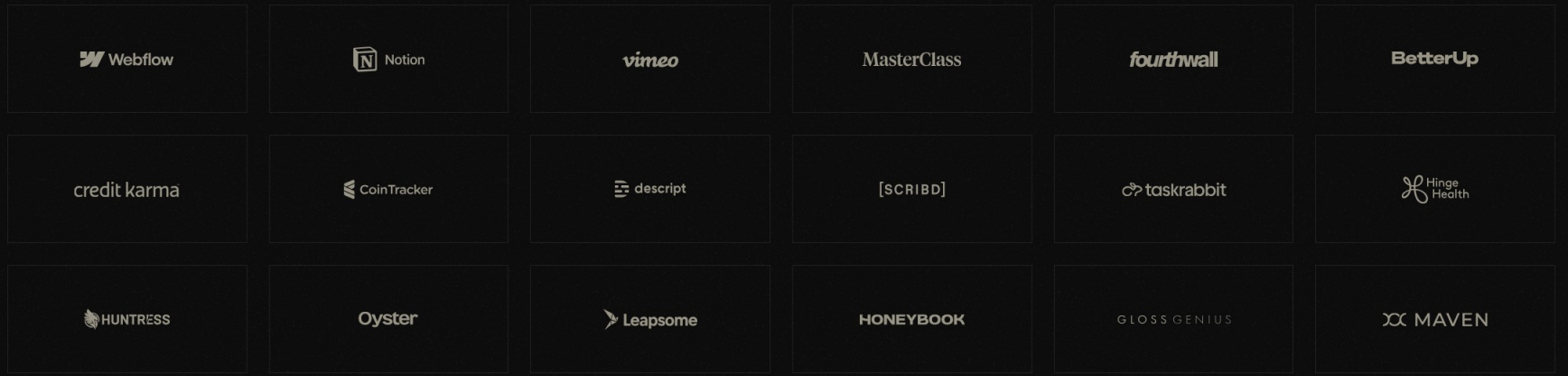






ABOUT

Graphite is a premier research driven growth agency working with companies like n8n, MasterClass, Adobe, Webflow, and Notion.

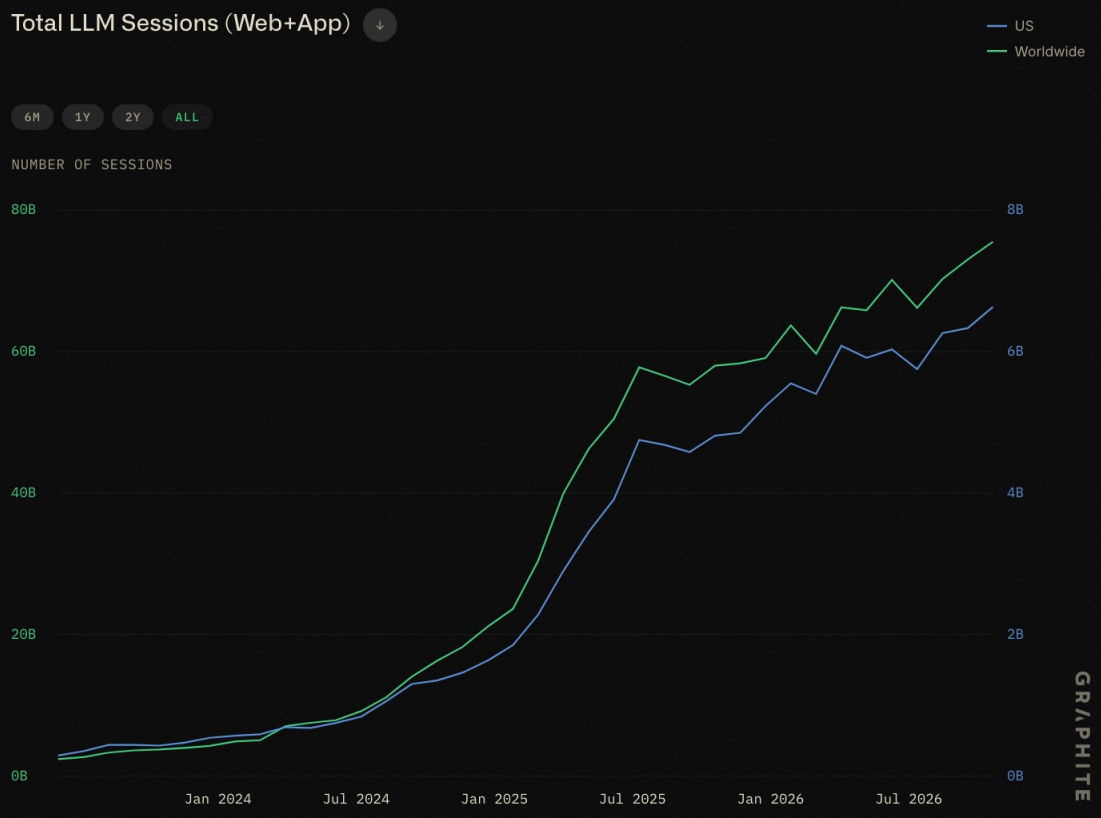


01

Key Findings

KEY FINDINGS

AI Usage Reached 76B Sessions A Month Worldwide, Growing 37% YoY

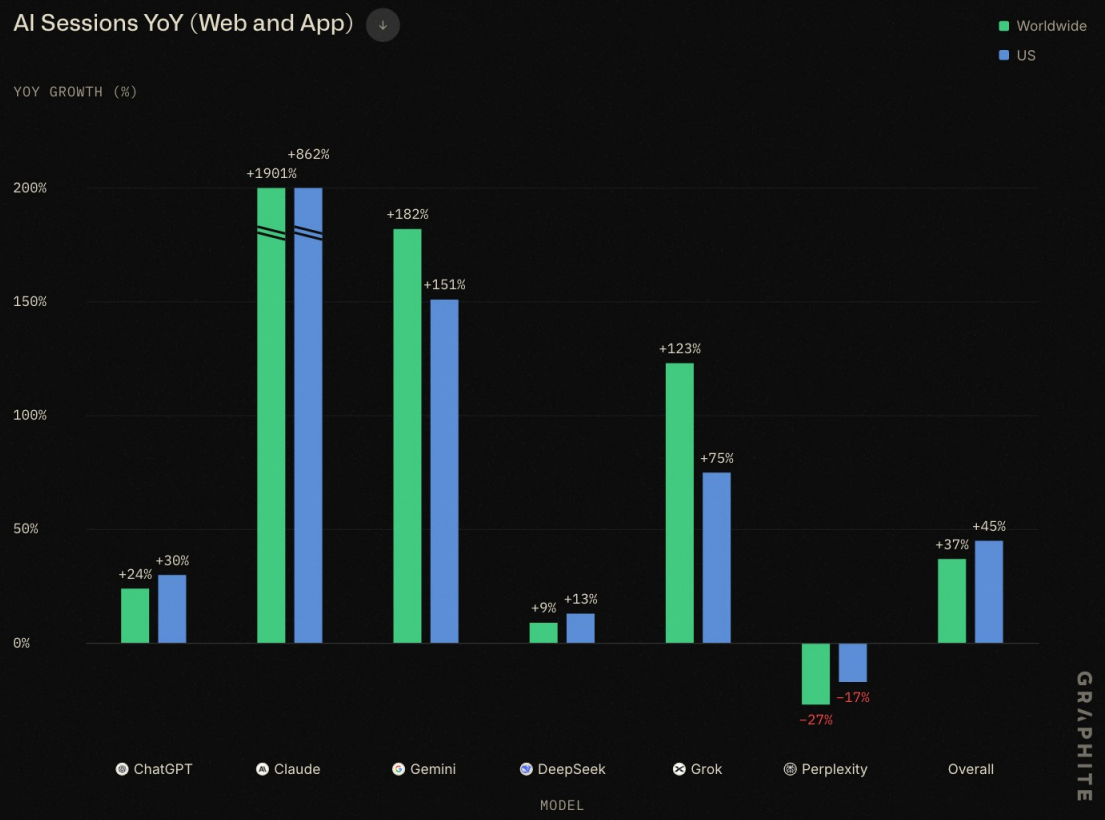


Total LLM sessions (web + app), worldwide and US, Sep 2025 vs. Sep 2026. US: 6.6B sessions, up 45% YoY. Source: Similarweb.

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KEY FINDINGS

Claude Grew Fastest Worldwide (+1,901% YoY), Followed By Gemini (+182%) And Grok (+123%)



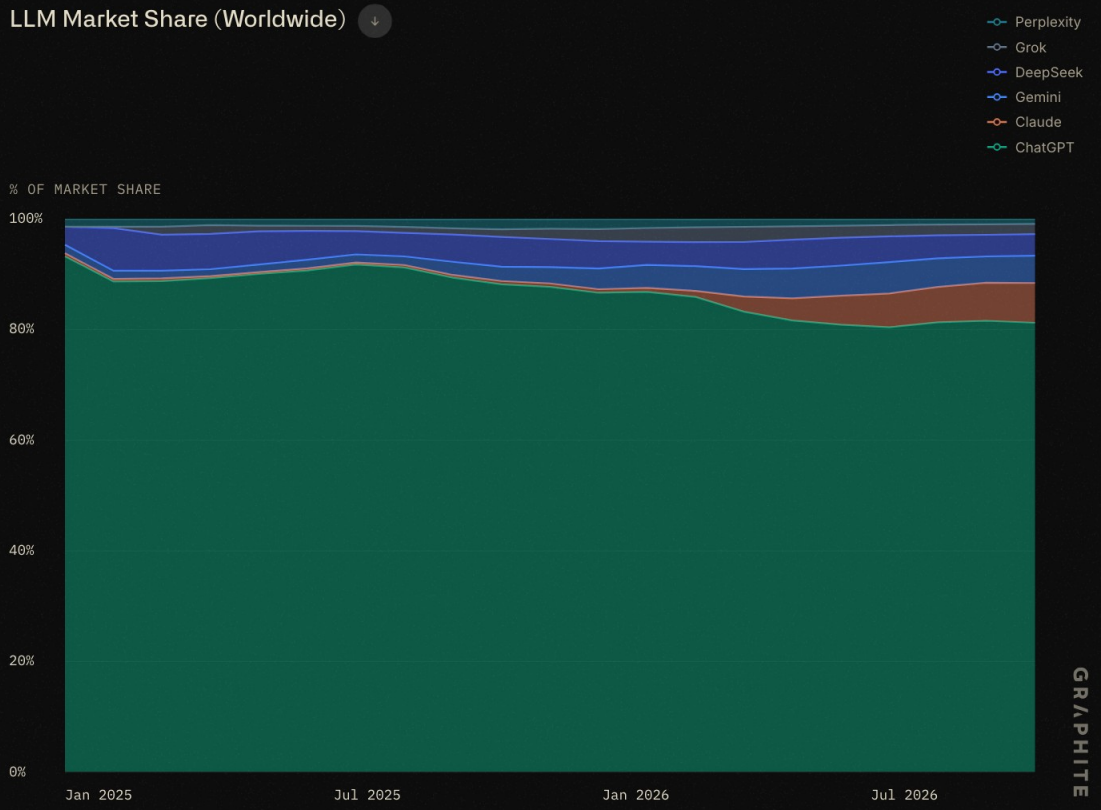
AI sessions YoY growth by product (web + app). ChatGPT contributed 58.9% of total worldwide growth, Claude 26%, Gemini 12%. Source: Similarweb.

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KEY FINDINGS

ChatGPT Holds 81.2% Of AI Sessions Worldwide And Has Regained Its Share

LLM Market Share (Worldwide)

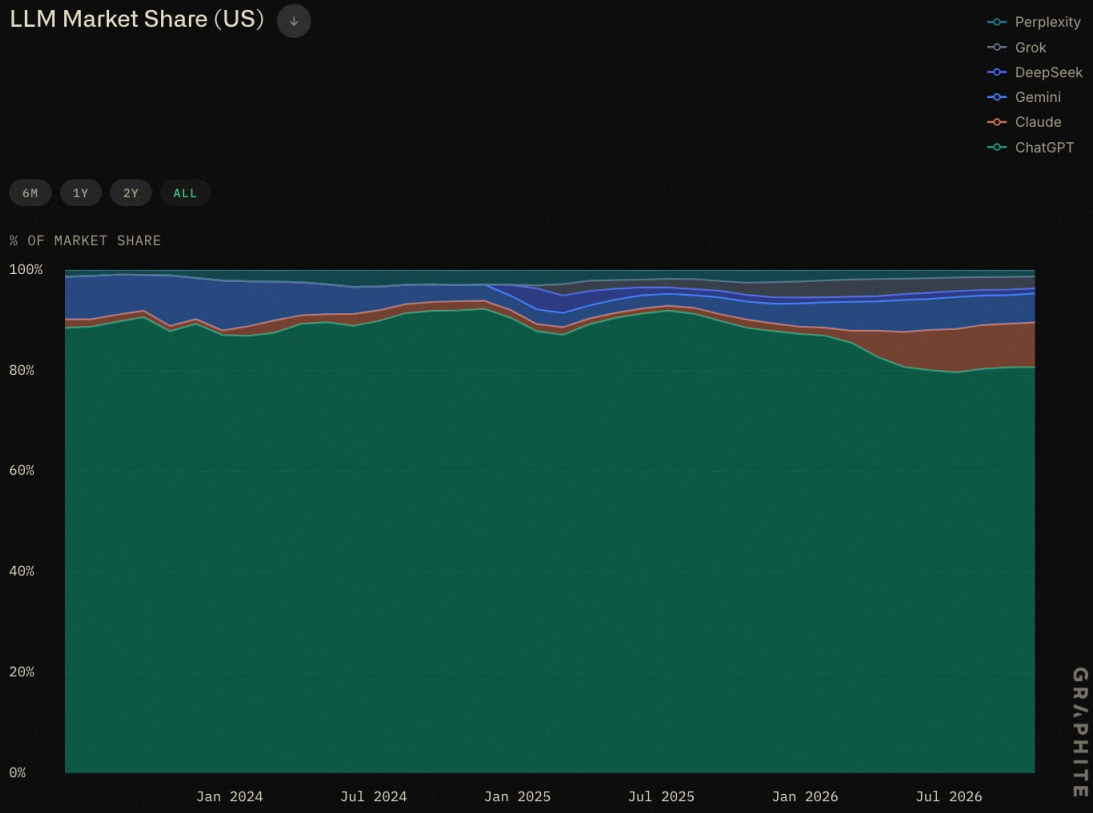


LLM market share, worldwide. ChatGPT lost 1.0pp share per month Jan–Jun 2026, then recovered 0.27pp per month in Jul–Sep. Source: Similarweb.

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KEY FINDINGS

ChatGPT's US Share Is 80.7%

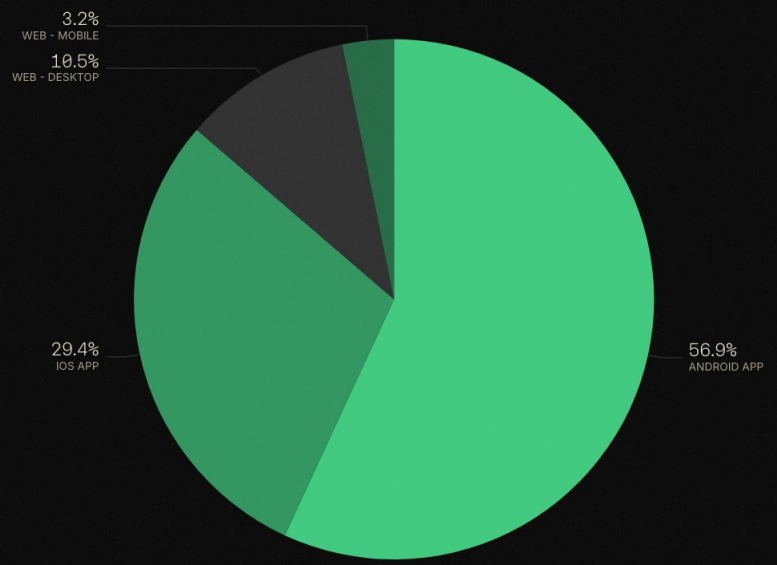


AI sessions by product, US (web + app). Source: Similarweb.

KEY FINDINGS

89% Of AI Sessions Worldwide Happen On A Mobile Device

Sessions Distribution across Devices (July – September 2026) Worldwide



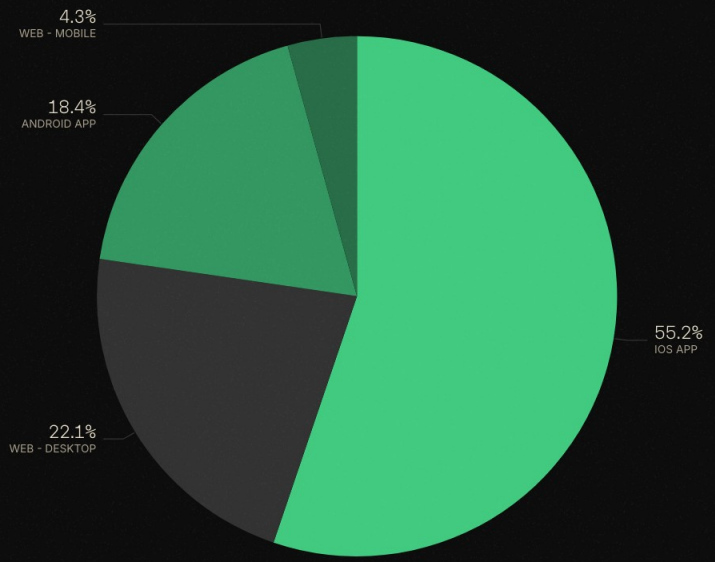
Source: Total Sessions by Device for the Top 6 LLMs (ChatGPT, Gemini, Claude, Grok, DeepSeek, Perplexity) Worldwide for Q3 2026. Similarweb

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KEY FINDINGS

78% Of US AI Sessions Happen On Mobile, Desktop Web Is 22%

Sessions Distribution Across Devices (July – September 2026) US



Source: Total Sessions by Device for the Top 6 LLMs (ChatGPT, Gemini, Claude, Grok, DeepSeek, Perplexity) Worldwide for Q3 2026. Similarweb

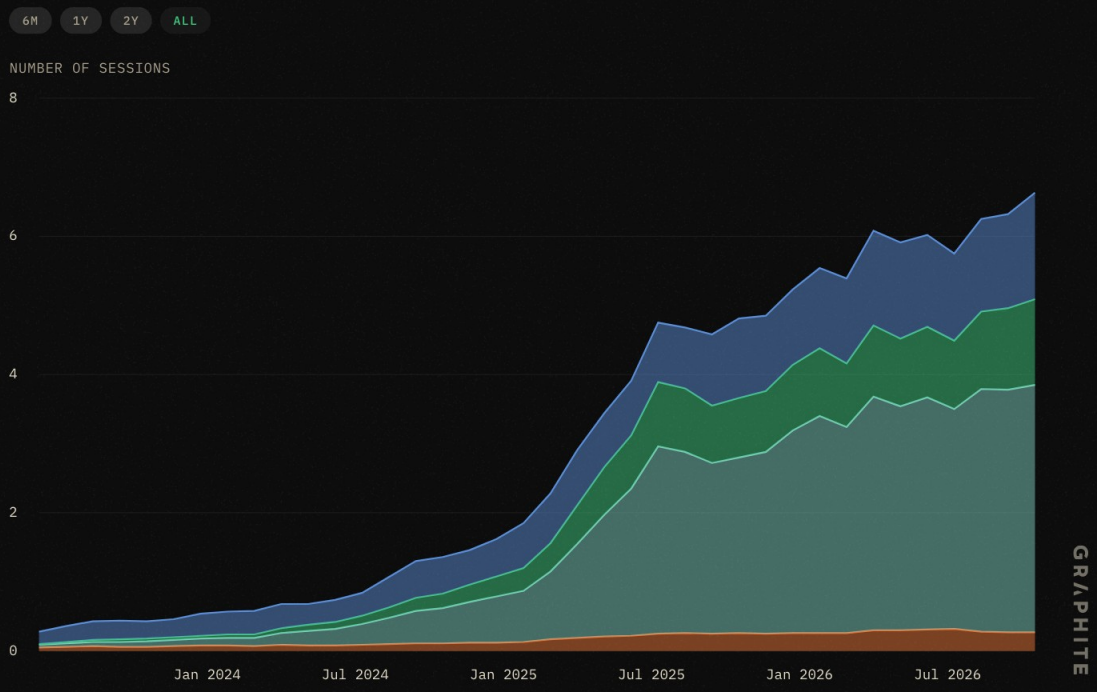
GRAPHITE

KEY FINDINGS

Mobile Apps Account For 74% Of AI Sessions In The US

AI sessions by device, US, Jul–Sep 2026. Worldwide, mobile apps account for 86%. Source: Similarweb.

Monthly AI Sessions by Surface (US)



02

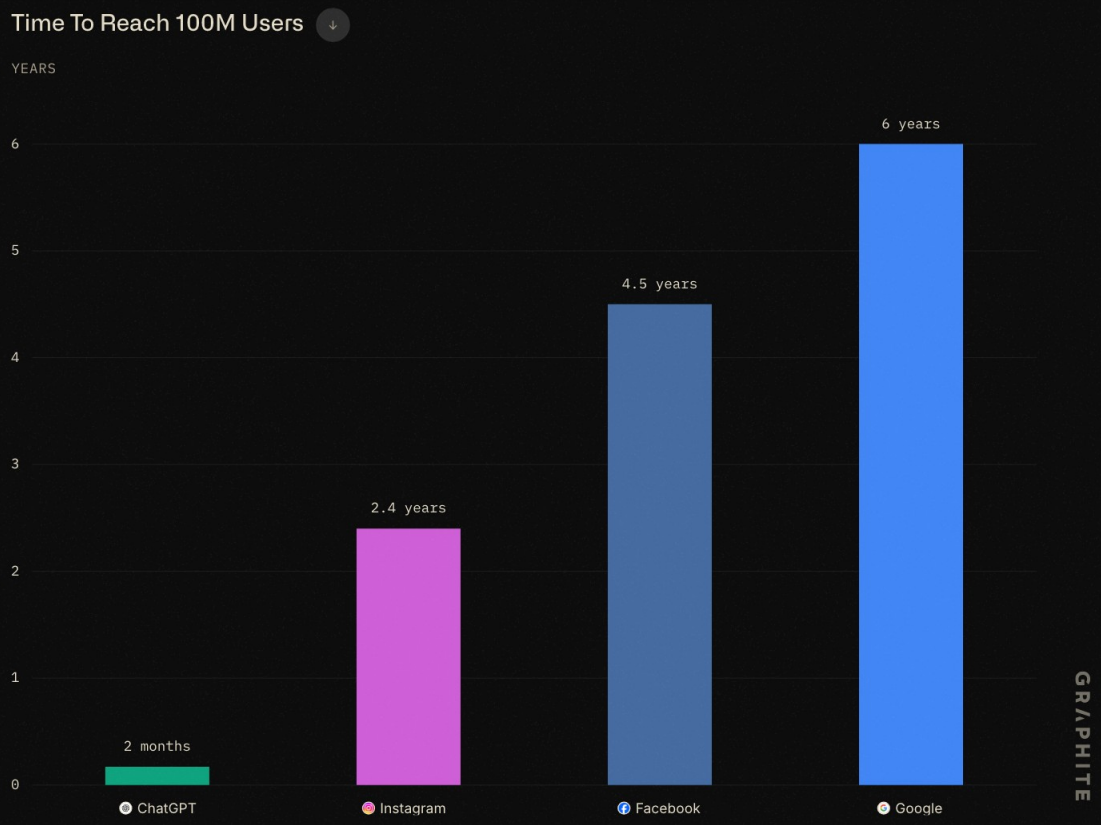
The AI Adoption Curve

THE AI ADOPTION CURVE

ChatGPT Reached 100M Users In 2 Months, Faster Than Instagram, Facebook And Google

This makes ChatGPT the fastest Growing Consumer App In History. Threads reportedly grew to 100M users in 5 days. However, Threads is an app that was built on Instagram rather than being a net new product.

Time to reach 100M users. Sources: The Guardian (ChatGPT), CNET (Instagram), Dave Morin (Facebook), SEC filing (Google, estimated).



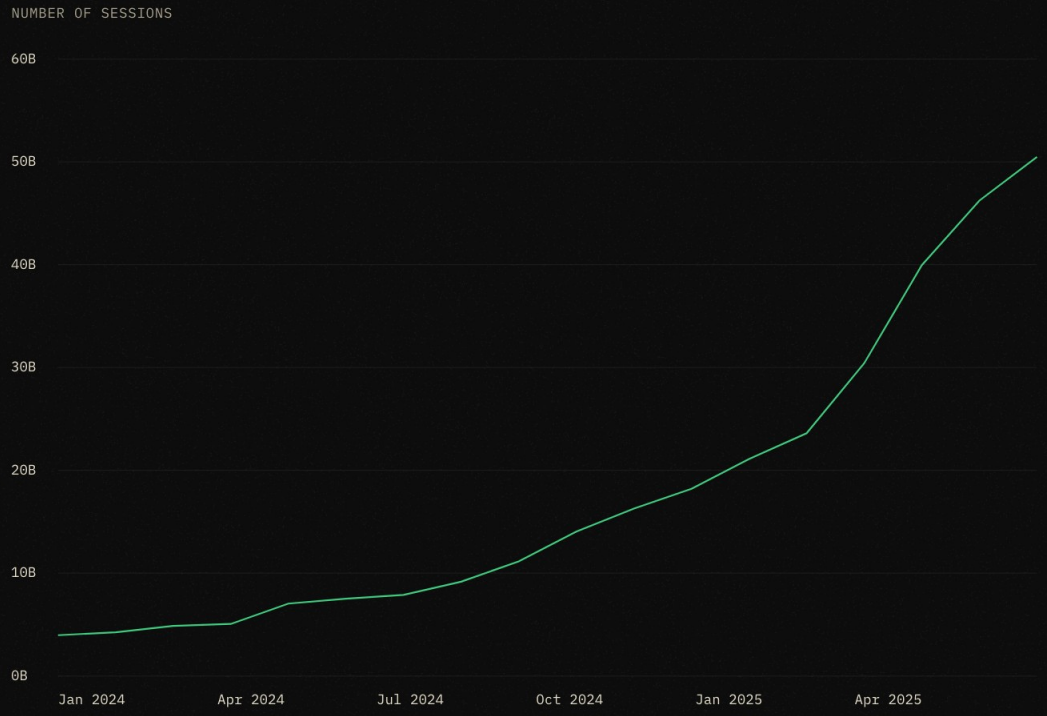
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THE AI ADOPTION CURVE

Monthly LLM Sessions Grew 13x Between January 2024 And June 2025

AI sessions 2024–2025 (web + app), worldwide. **Source:** Similarweb.

AI Sessions 2024 – 2025 (Web and App, Worldwide)



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THE AI ADOPTION CURVE

The 2025 AI Plateau

After unprecedented growth, worldwide AI Sessions grew only 2.3% between July And December 2025

Q3-Q4 2025 AI Sessions (Web+App, Worldwide)



AI sessions (web + app), worldwide, Q3-Q4 2025. Source: Similarweb.

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THE AI ADOPTION CURVE

The 2026 AI Resurgence

Monthly AI Sessions Have Grown 28% Since December 2025, From 59B To 76B

AI Sessions (Web + App)



Total of web and app sessions for the top 6 LLMs (ChatGPT, Gemini, Claude, Grok, Perplexity, DeepSeek), worldwide, Jul 2025 – Sep 2026. Source: Similarweb.

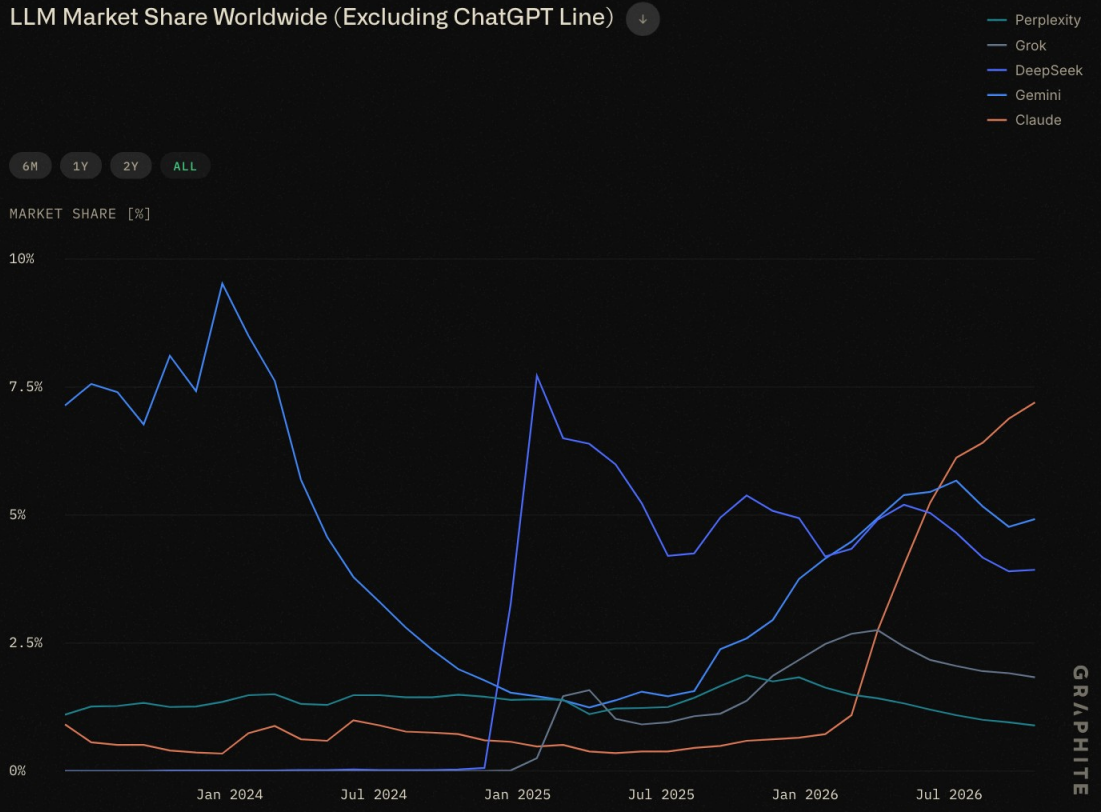
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03 The Messy & Unpredictable Growth of AI

GROWTH BY AI PRODUCT

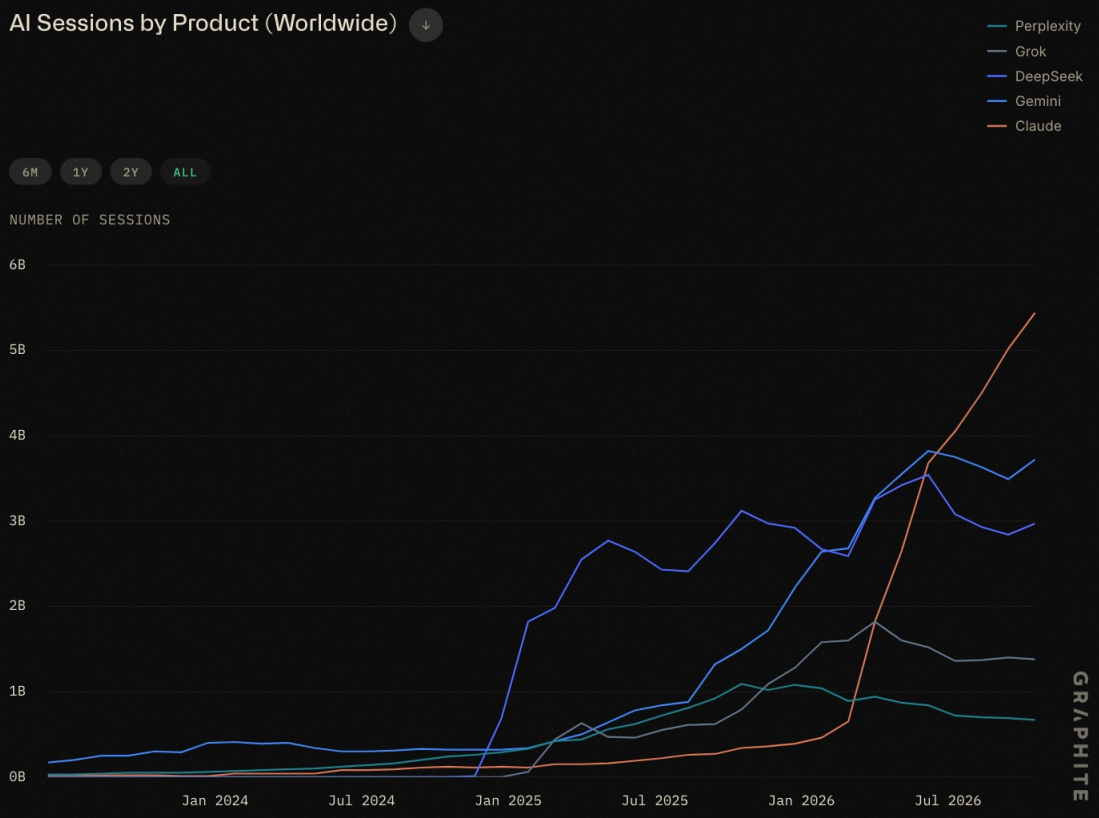
ChatGPT Maintains 81.2% Of The Market Share Worldwide, No Competitor Has Reached Even A 10%

Total sessions by product of top LLMs (ChatGPT, Claude, Gemini, DeepSeek & Grok). Source: Similarweb.



GROWTH BY AI PRODUCT

AI Grew Exponentially From July 2023 To June 2025, Plateaued From July To December 2025, And Has Grown Steadily Since January 2026

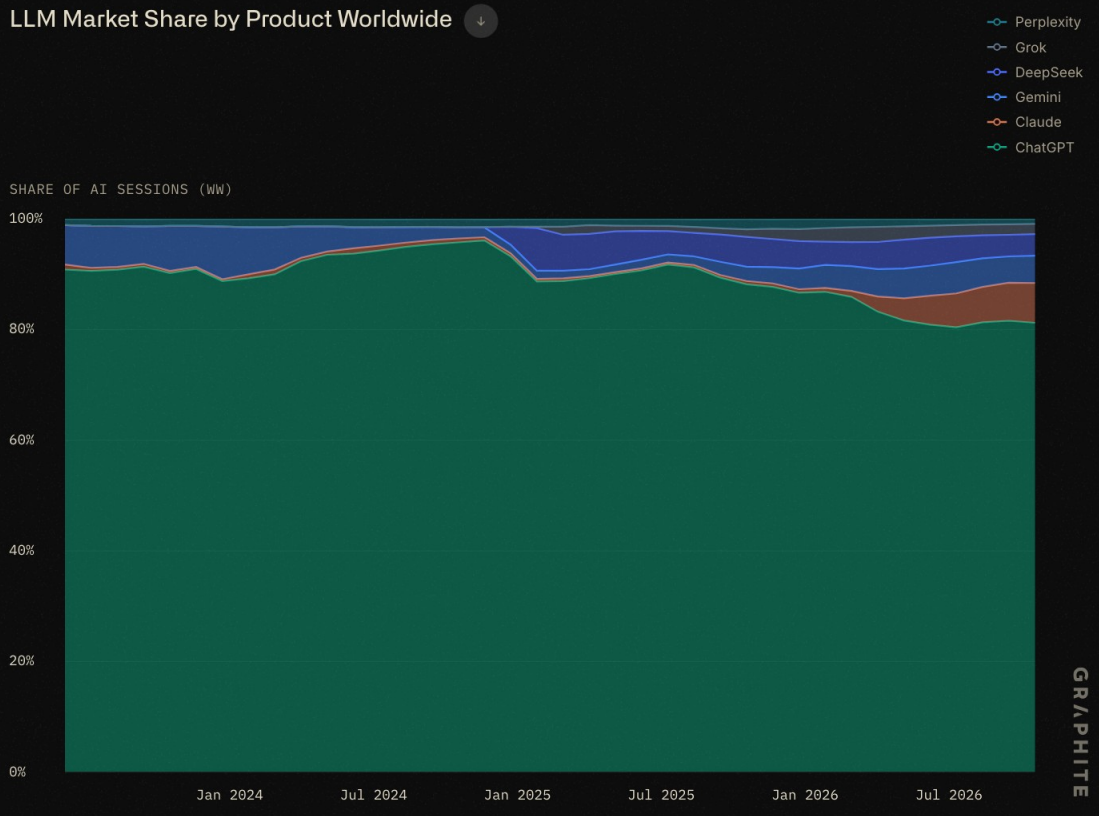


AI sessions by product (web + app), worldwide. **Source:** Similarweb.

GROWTH BY AI PRODUCT

Claude Has Seen Explosive Growth Starting In February 2026

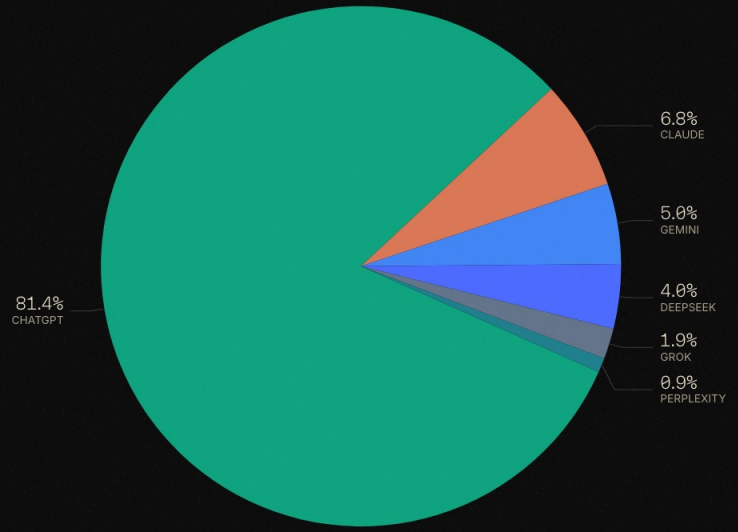
LLM market share, worldwide, excluding ChatGPT. Source: Similarweb.



GROWTH BY AI PRODUCT

No Competitor Has Reached 10% Share. ChatGPT Holds 81.4% Worldwide

Share of AI Sessions by Product (Q3 - 2026) Worldwide



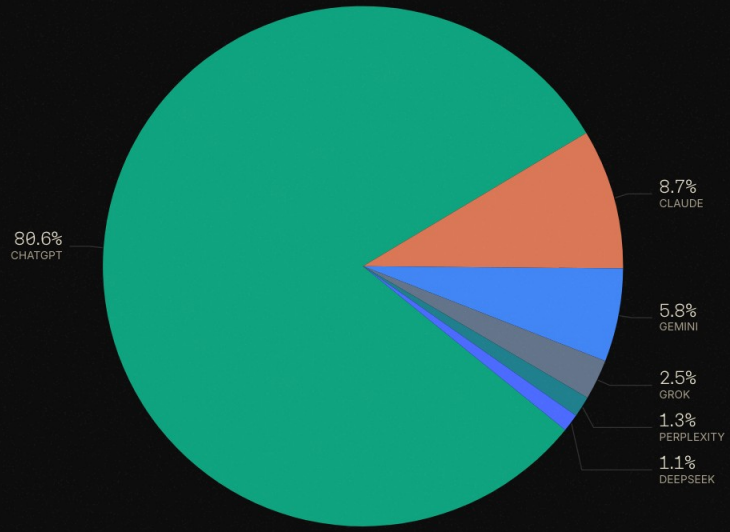
Source: Total of Web and Mobile App Sessions by Product for the Top 6 LLMs (ChatGPT, Gemini, Claude, Grok, DeepSeek, Perplexity) Worldwide for Q3 2026. Similarweb

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GROWTH BY AI PRODUCT

For The US, ChatGPT Holds 80.6% Of AI Sessions

Share of AI Sessions by Product (Q3 - 2026) US



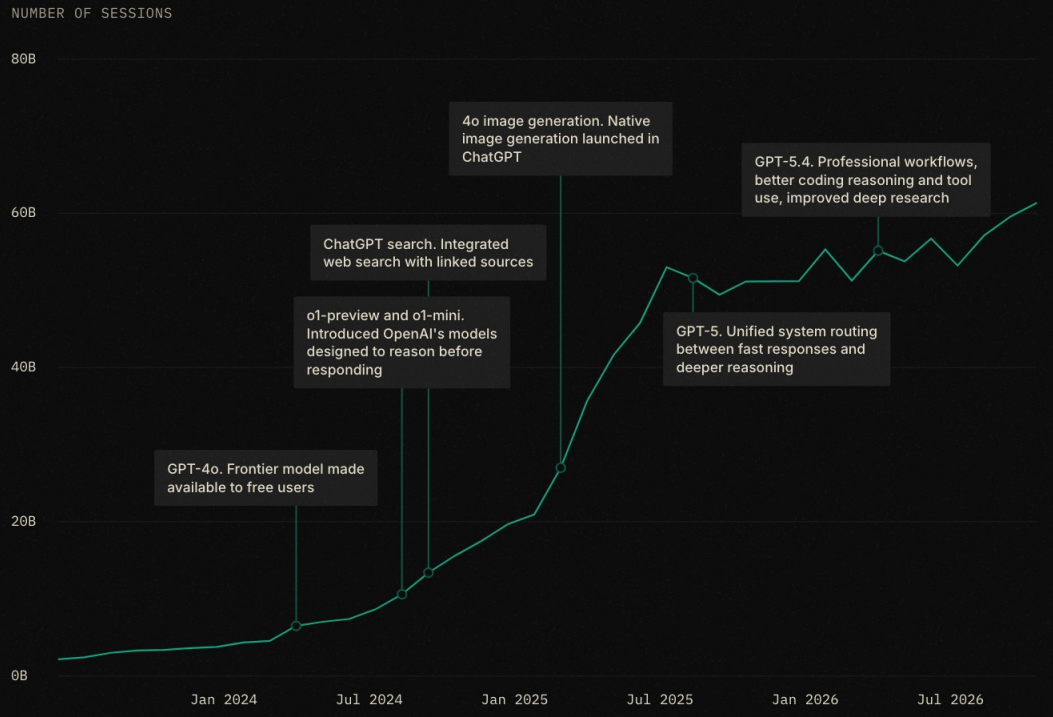
Source: Total of Web and Mobile App Sessions by Product for the Top 6 LLMs (ChatGPT, Gemini, Claude, Grok, DeepSeek, Perplexity) US for Q3 2026. Similarweb

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GROWTH BY AI PRODUCT

ChatGPT Plateaued For The Rest Of 2025, Then Grew 20% To An All-Time High Of 61.35B In September 2026

ChatGPT Sessions (Worldwide)



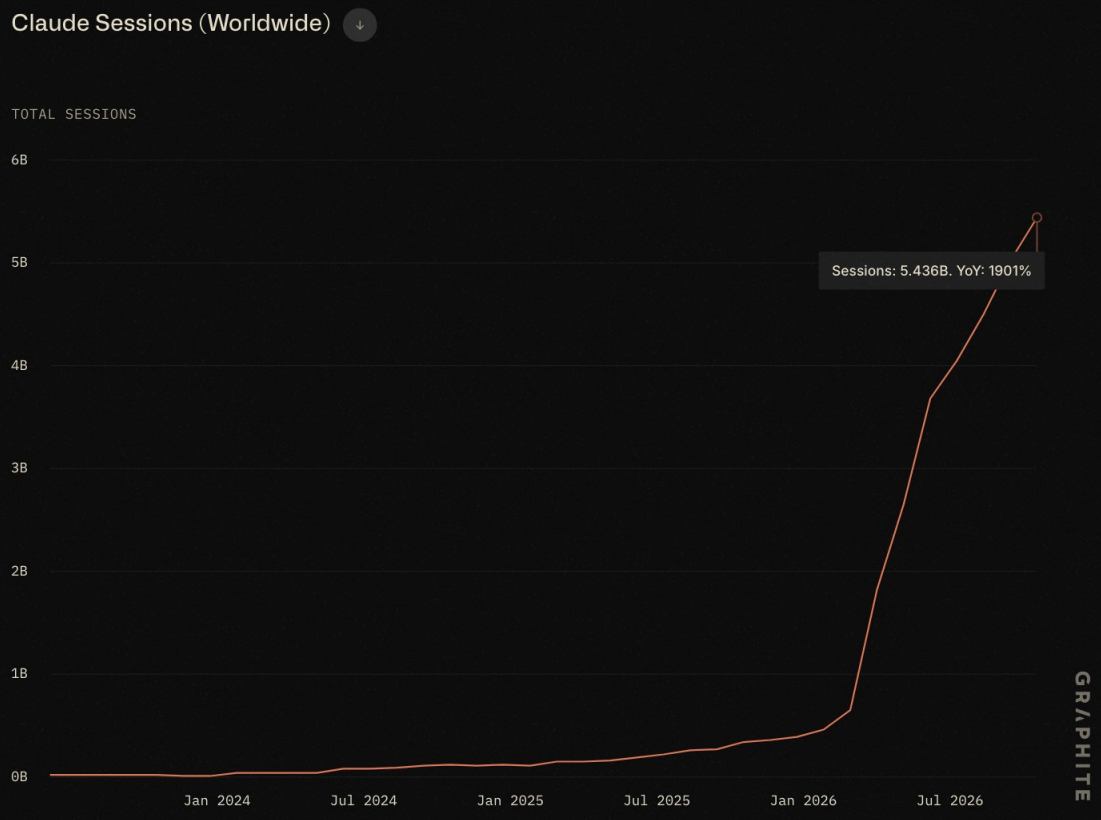
ChatGPT sessions (web + app), worldwide, with release milestones. Sessions slipped 3.4% between July and December 2025, from 53B to 51B. Source: Similarweb.

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GROWTH BY AI PRODUCT

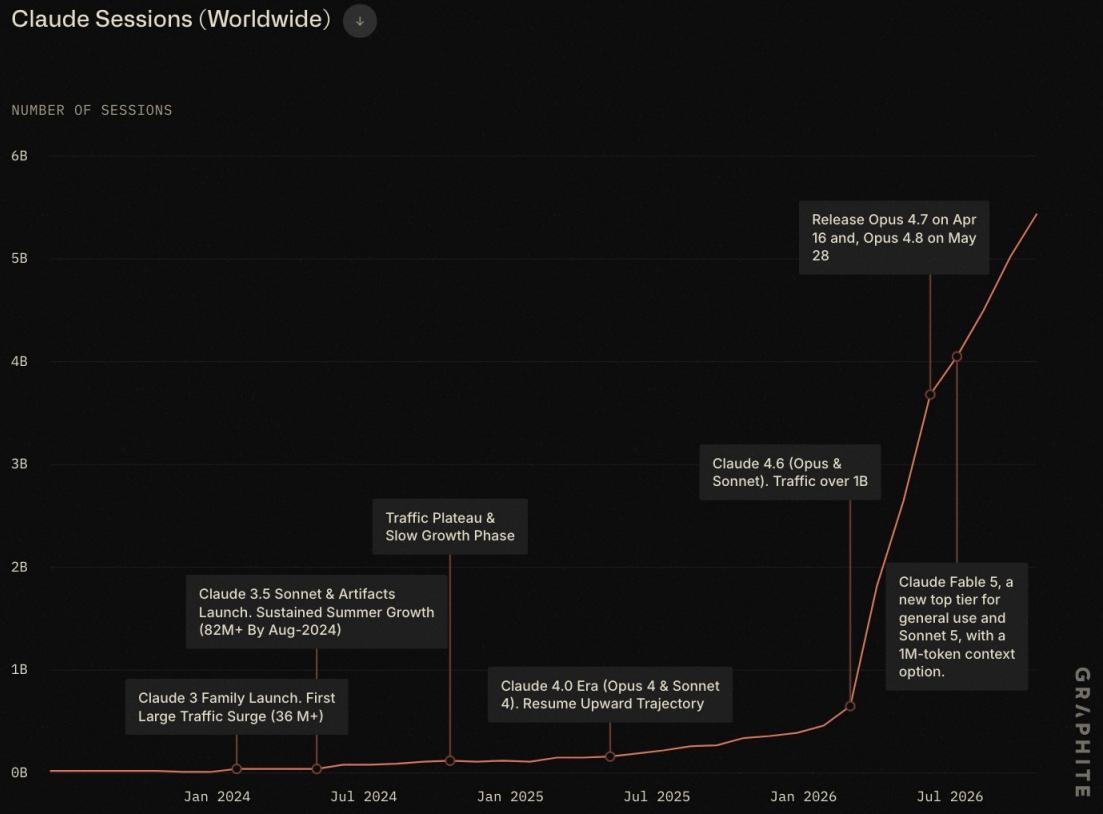
Claude Sessions Grew 296% Worldwide, From 459M To 1.82B

Claude sessions (web + app), worldwide. Growth measured January to March 2026. Source: Similarweb.



GROWTH BY AI PRODUCT

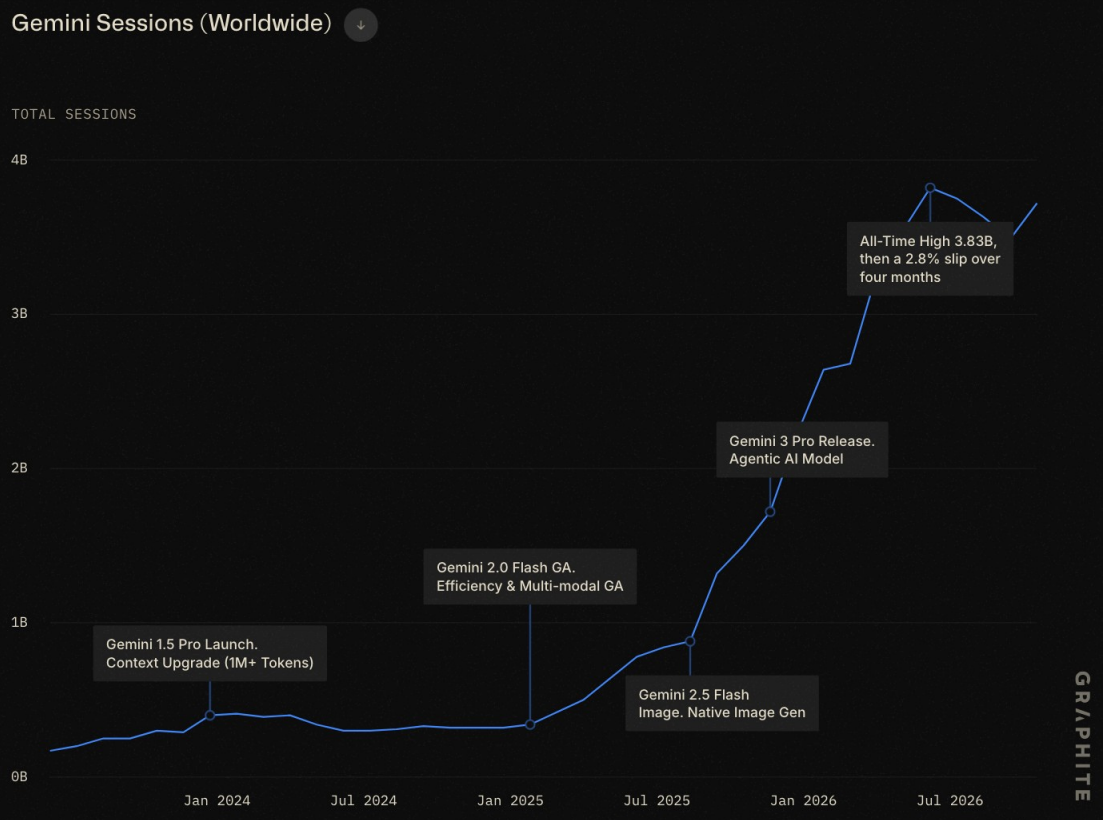
Claude 4.6 Pushed Worldwide Sessions Past 1B (1.82B) In March 2026



Claude sessions, worldwide, with release milestones. Worldwide Daily Active Users (DAUs) grew 443% and app installs 1495% from January to March 2026. Source: Similarweb.

GROWTH BY AI PRODUCT

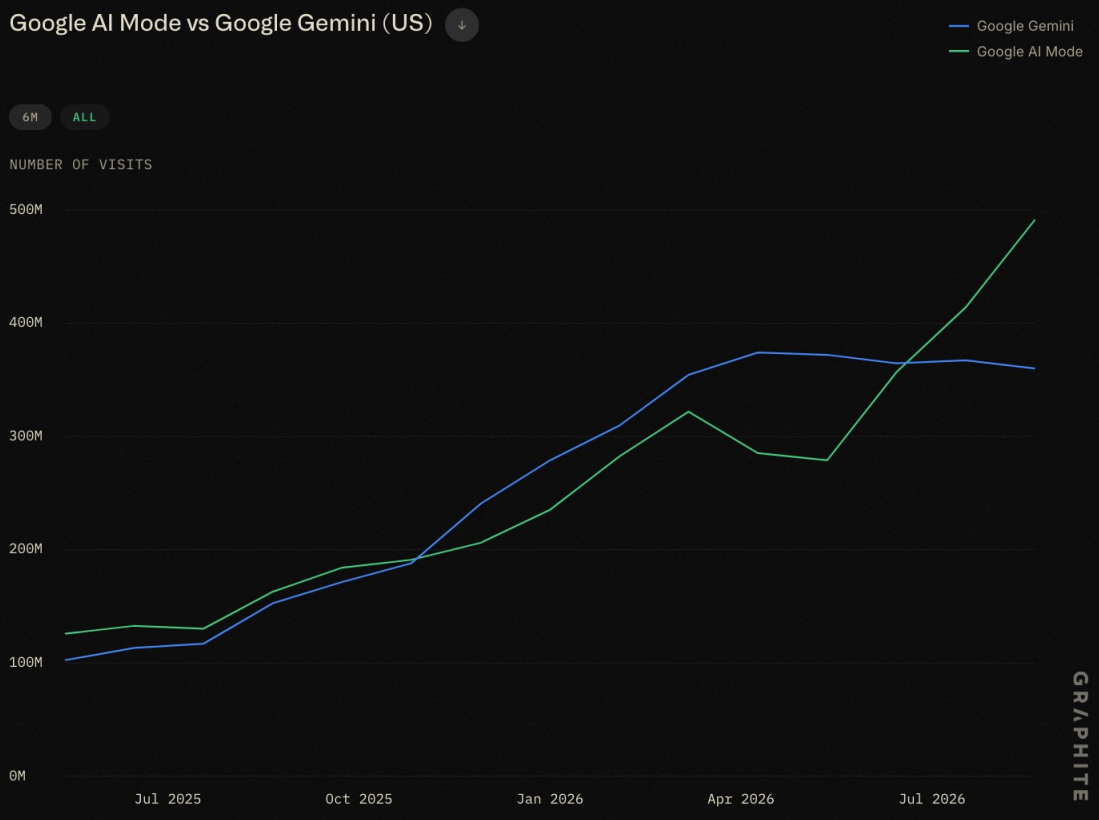
Gemini Sessions Grew 45% Worldwide From January To May 2026



Gemini sessions, worldwide. Since May 2026, worldwide sessions have slipped 2.8% over 4 months. Source: Similarweb.

GROWTH BY AI PRODUCT

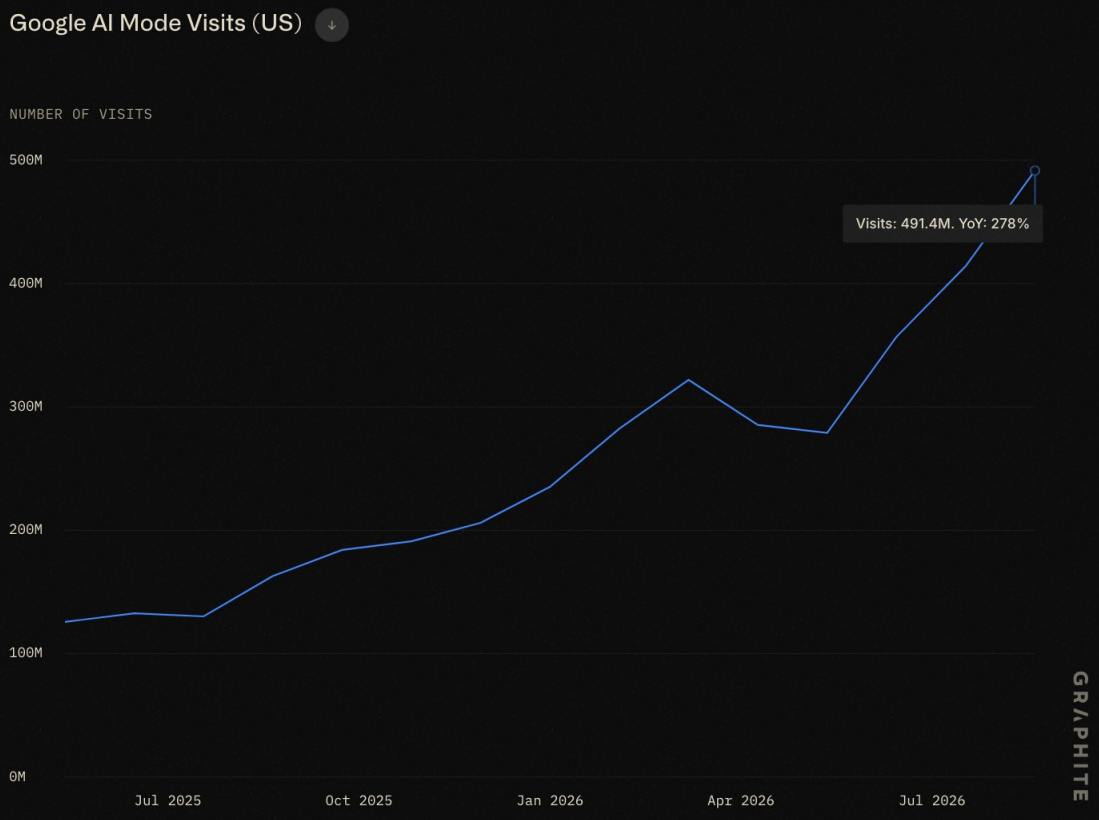
Google AI Mode Received 36% More US Web Visits Than Gemini



Google AI Mode vs. Google Gemini web visits, US. Aug 2026: AI Mode 491M, Gemini 360M. Source: Similarweb.

GROWTH BY AI PRODUCT

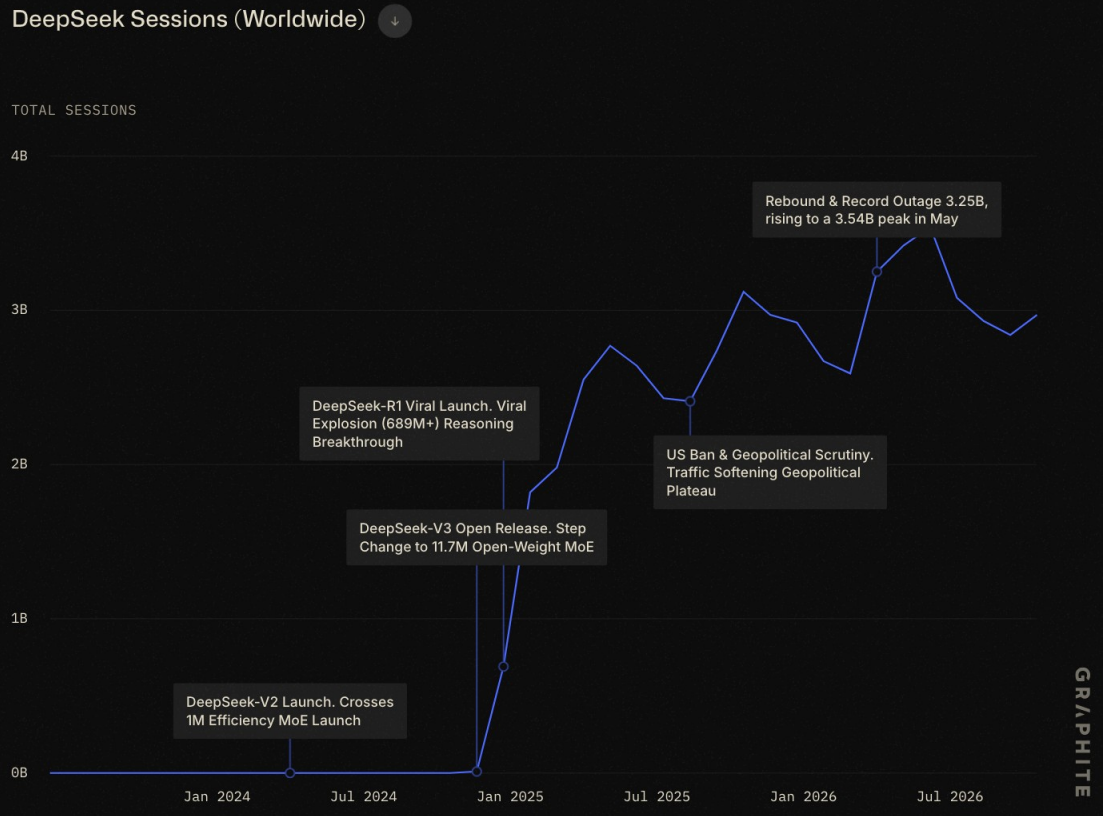
Google AI Mode Received 491M Web Visits In The US In August 2026



Google AI Mode web visits, US. Source: Similarweb.

GROWTH BY AI PRODUCT

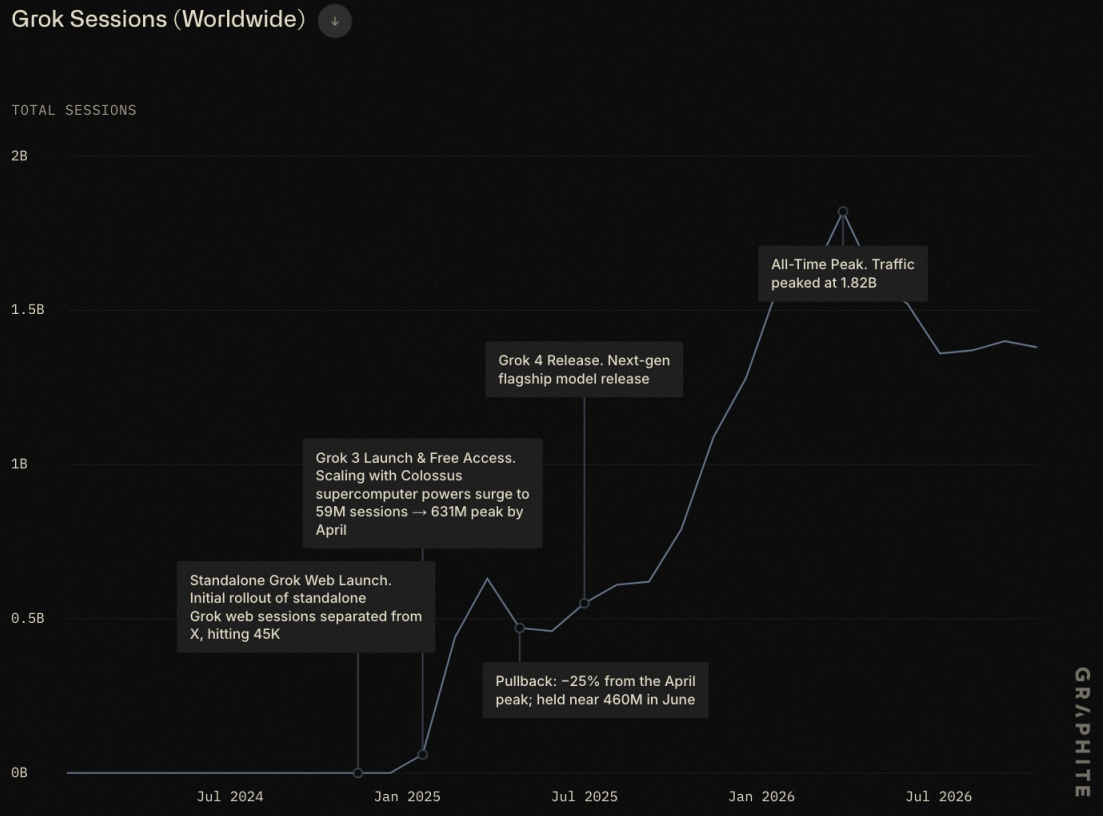
DeepSeek Sessions Grew 15,346% Worldwide, Peaking At 35M DAUs In Launch Week



DeepSeek sessions, worldwide. Growth measured Dec 2024 to Feb 2025. Source: Similarweb.

GROWTH BY AI PRODUCT

Grok Sessions Grew 701% Worldwide From February To May 2025

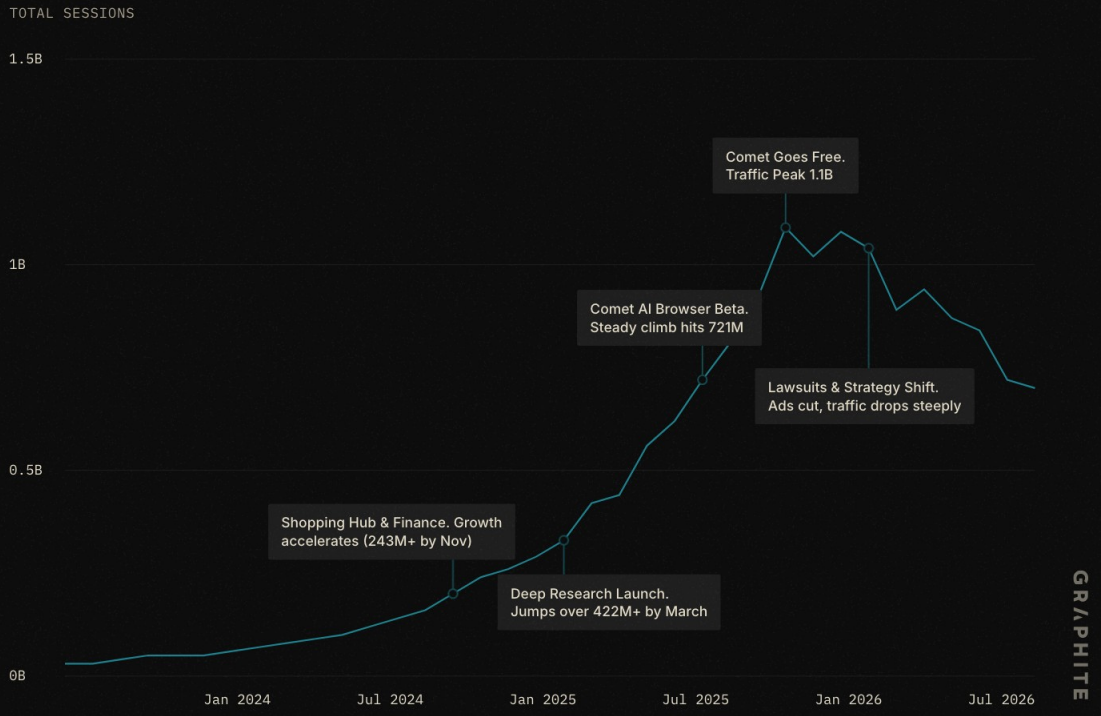


Grok sessions, worldwide. DAUs grew 4,865% and app installs 3,570% over the same period. Source: Similarweb.

GROWTH BY AI PRODUCT

Perplexity Sessions Have Fallen 38% Worldwide Since October 2025

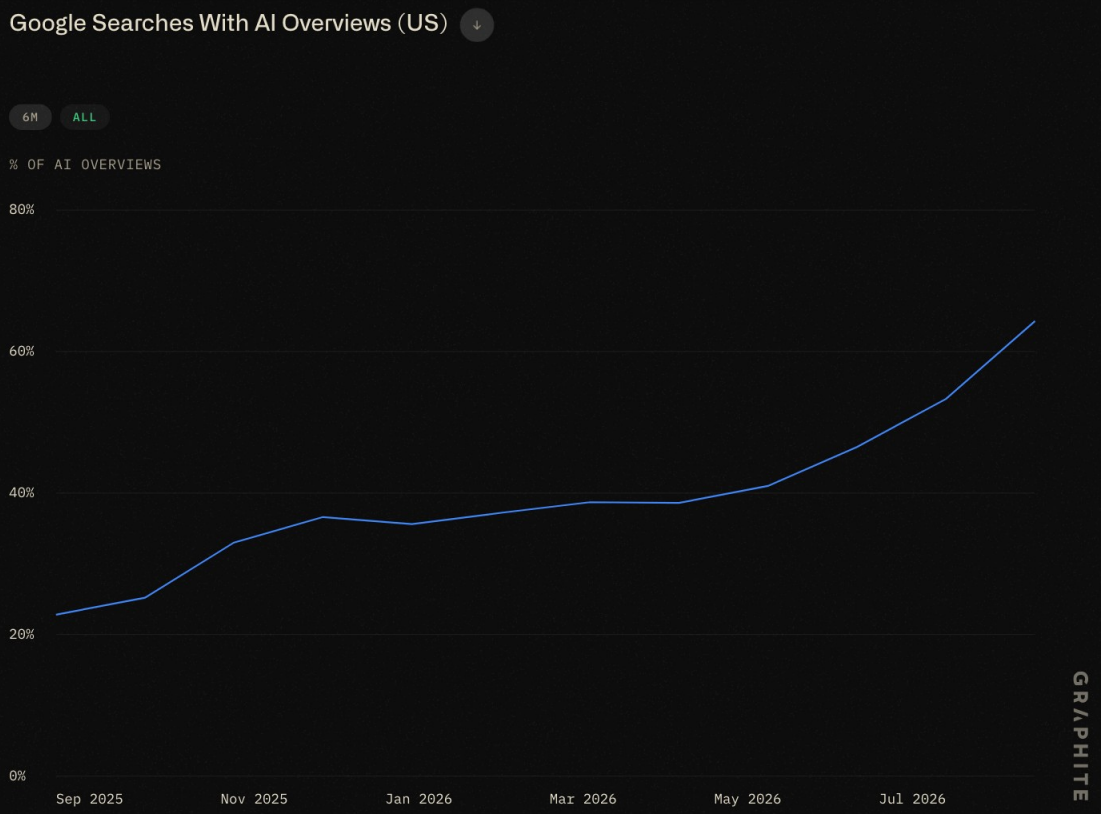
Perplexity Sessions (Worldwide)



Perplexity sessions, worldwide, through September 2026.
Source: Similarweb.

GROWTH BY AI PRODUCT

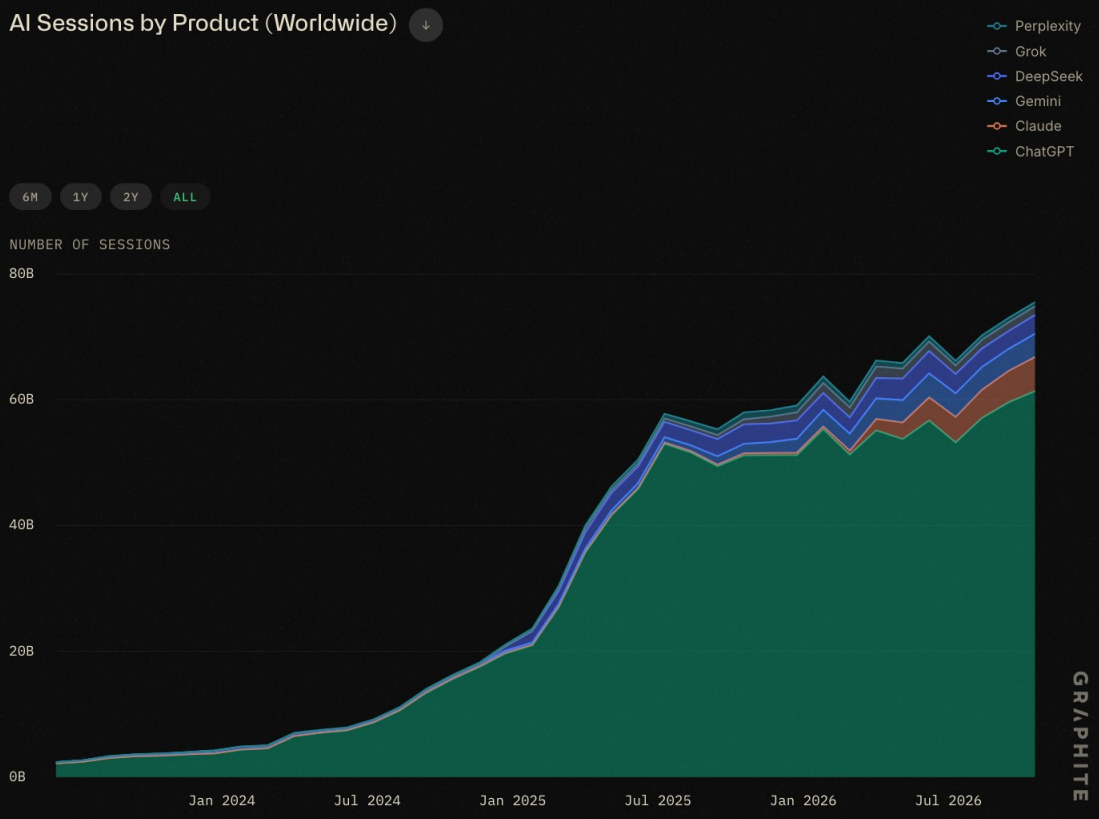
64% Of Google Searches Show AI Overviews



Google searches with AI Overviews, US. Source: Similarweb.

GROWTH BY AI PRODUCT

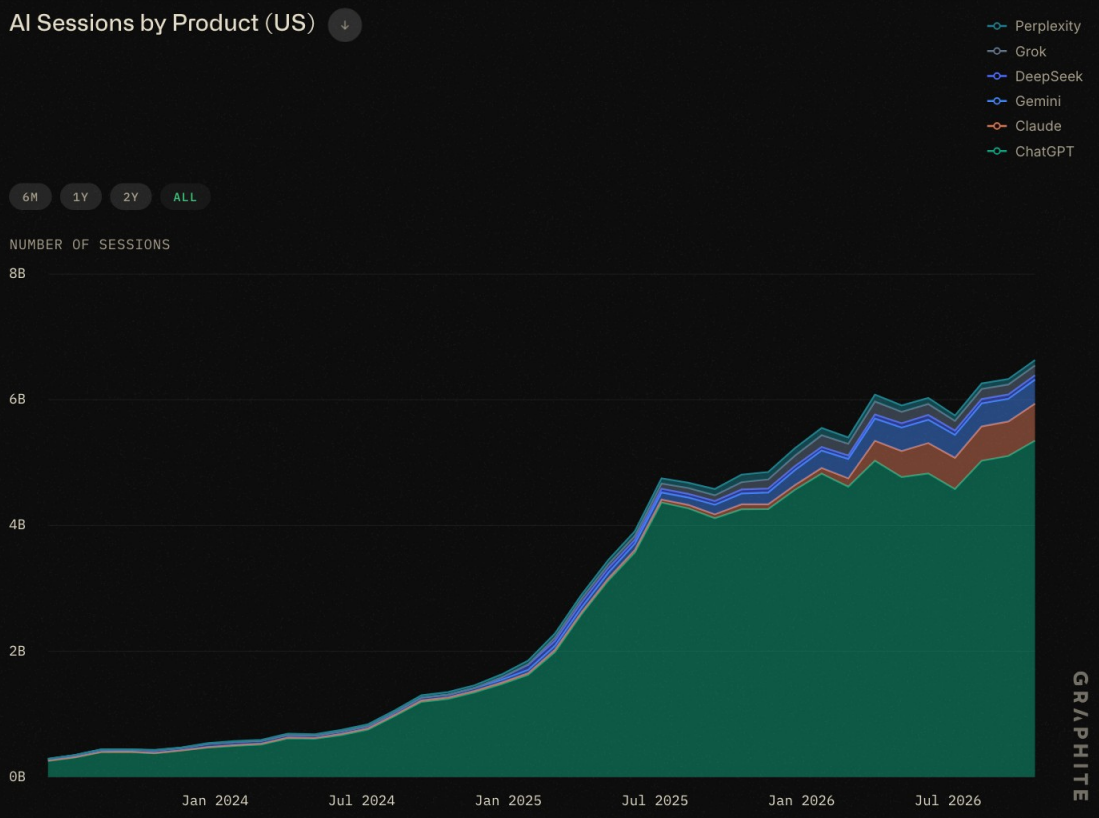
Every Major LLM, But Perplexity, Grew In Sessions From Sep 2025 To Sep 2026



AI sessions by product (web + app), worldwide. **Source:** Similarweb.

GROWTH BY AI PRODUCT

Growth Happened Both Worldwide And US



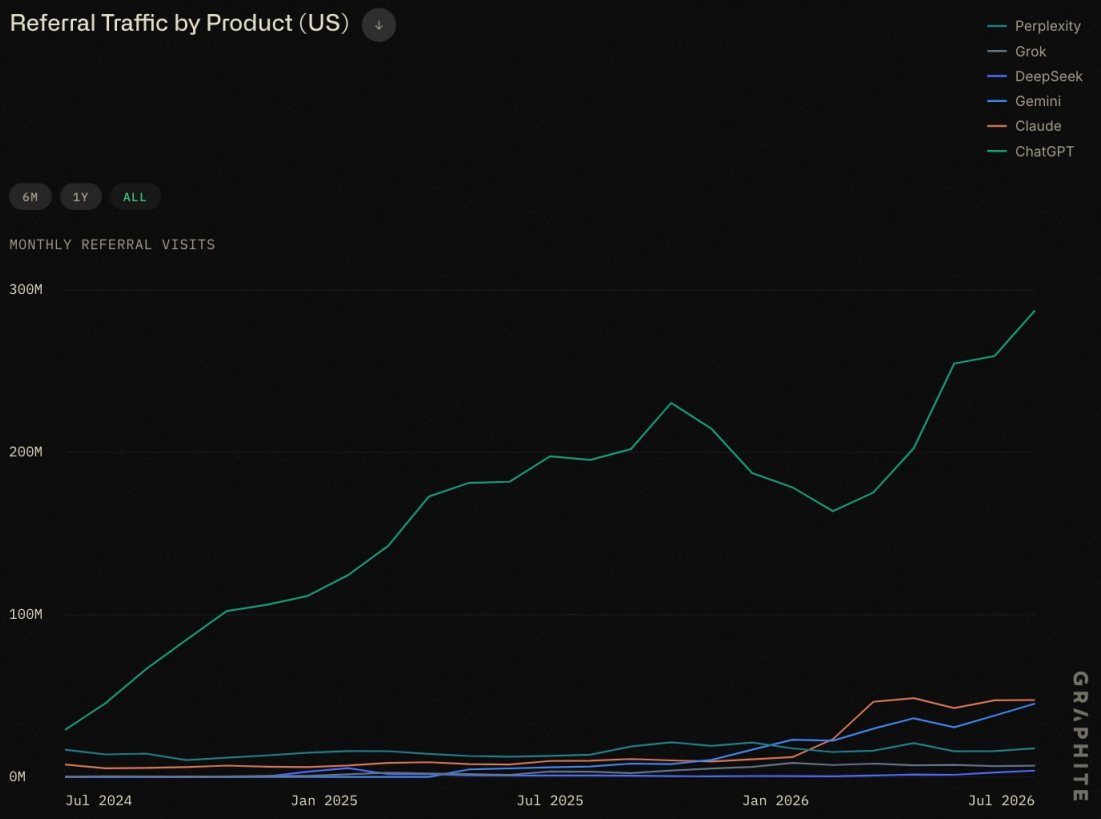
AI sessions by product (web + app), US. Every major LLM but Perplexity grew in total sessions comparing Sep 2025 and Sep 2026, including ChatGPT (+24%). Source: Similarweb.

04 Referral Traffic

REFERRAL TRAFFIC

AI Referral Traffic By Product, US

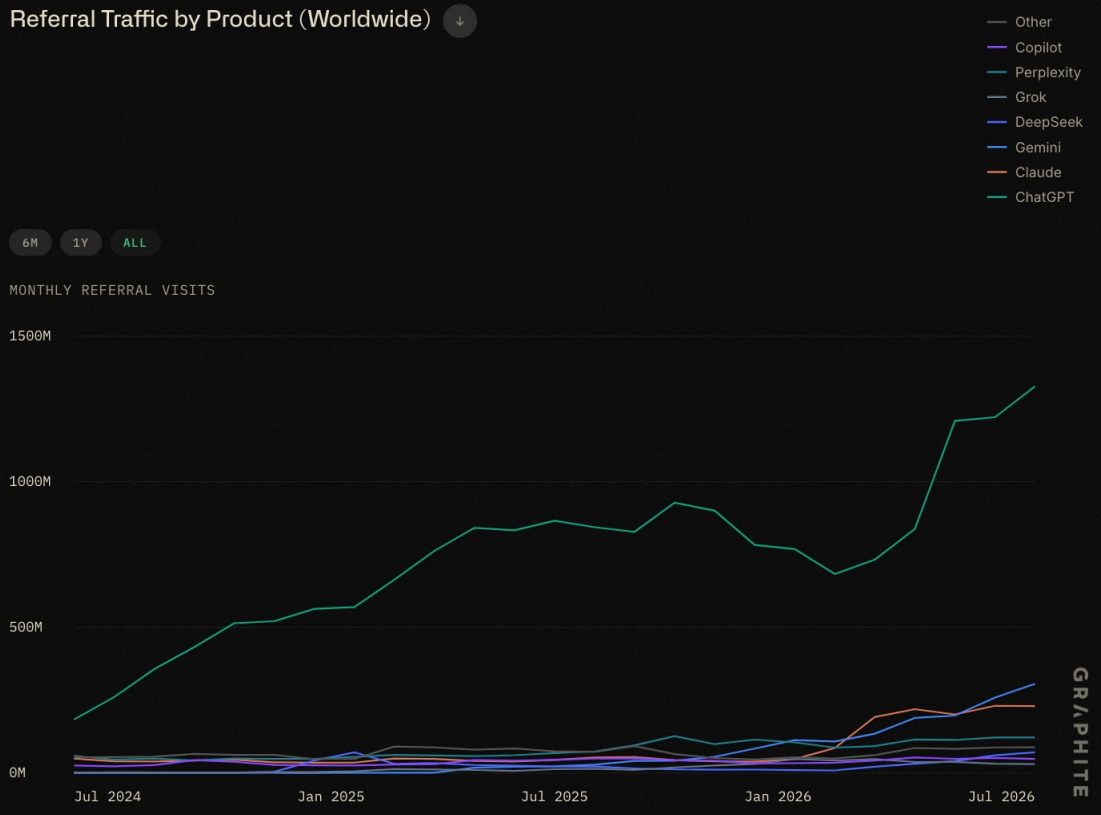
Referral traffic per top LLMs (ChatGPT, Claude, Gemini, Perplexity, DeepSeek, Grok), US. Source: Similarweb.



REFERRAL TRAFFIC

Referral Traffic From AI Grew 92% YoY Worldwide

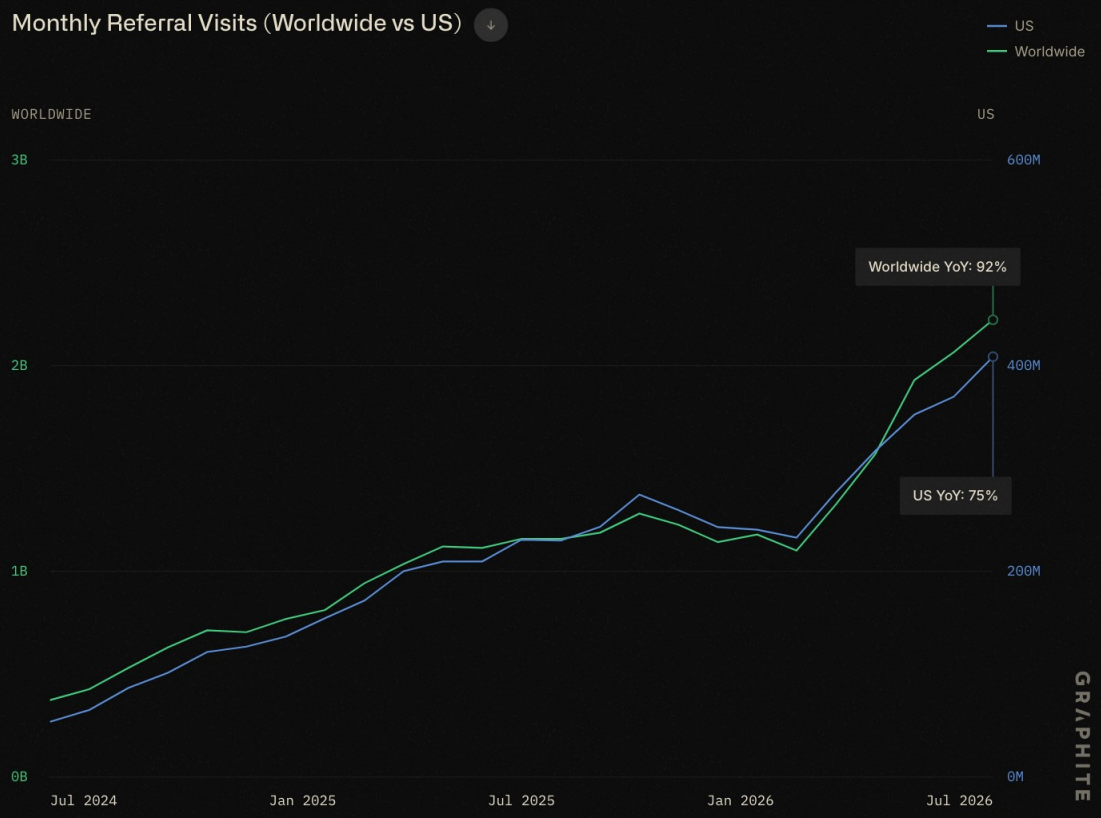
Referral Traffic by Product (Worldwide)



Monthly referral visits by product, worldwide (ChatGPT, Claude, Gemini, Perplexity, DeepSeek, Copilot, Grok and others). Source: Similarweb.

REFERRAL TRAFFIC

Referral Traffic From AI Grew 92% YoY Worldwide And 75% YoY In The US



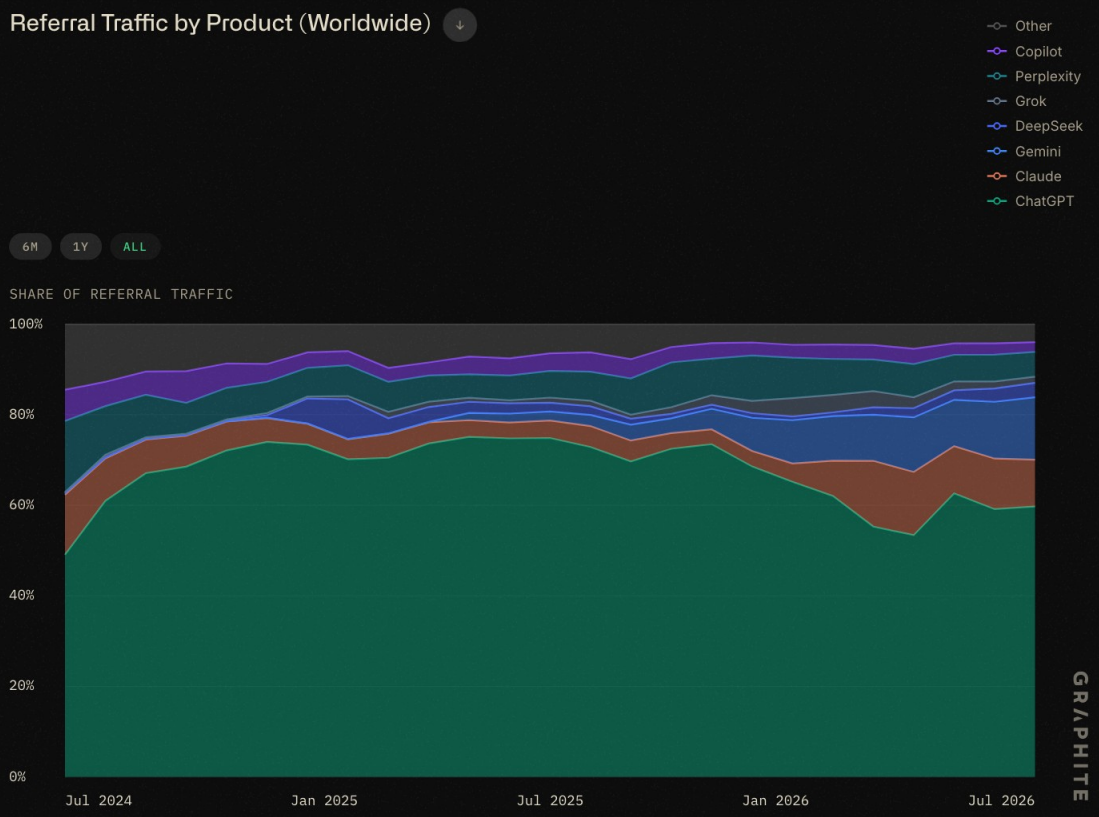
Referral traffic from AI, worldwide vs. US, July 2025 vs. July 2026. Source: Similarweb.

GRAPHITE

REFERRAL TRAFFIC

ChatGPT Owns 60% Of AI Referral Traffic, Followed By Gemini (14%) And Claude (10%)

Share of referral traffic by LLM, worldwide. Source: Similarweb.



REFERRAL TRAFFIC

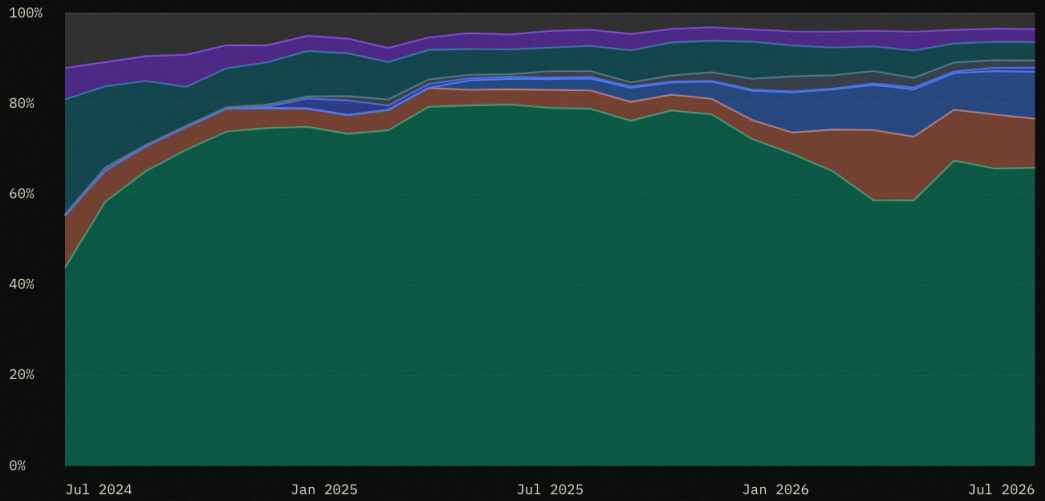
AI Referral Traffic By Product, US

Referral Traffic by Product (US)

Other
Copilot
Perplexity
Grok
DeepSeek
Gemini
Claude
ChatGPT

6M 1Y ALL

SHARE OF REFERRAL TRAFFIC

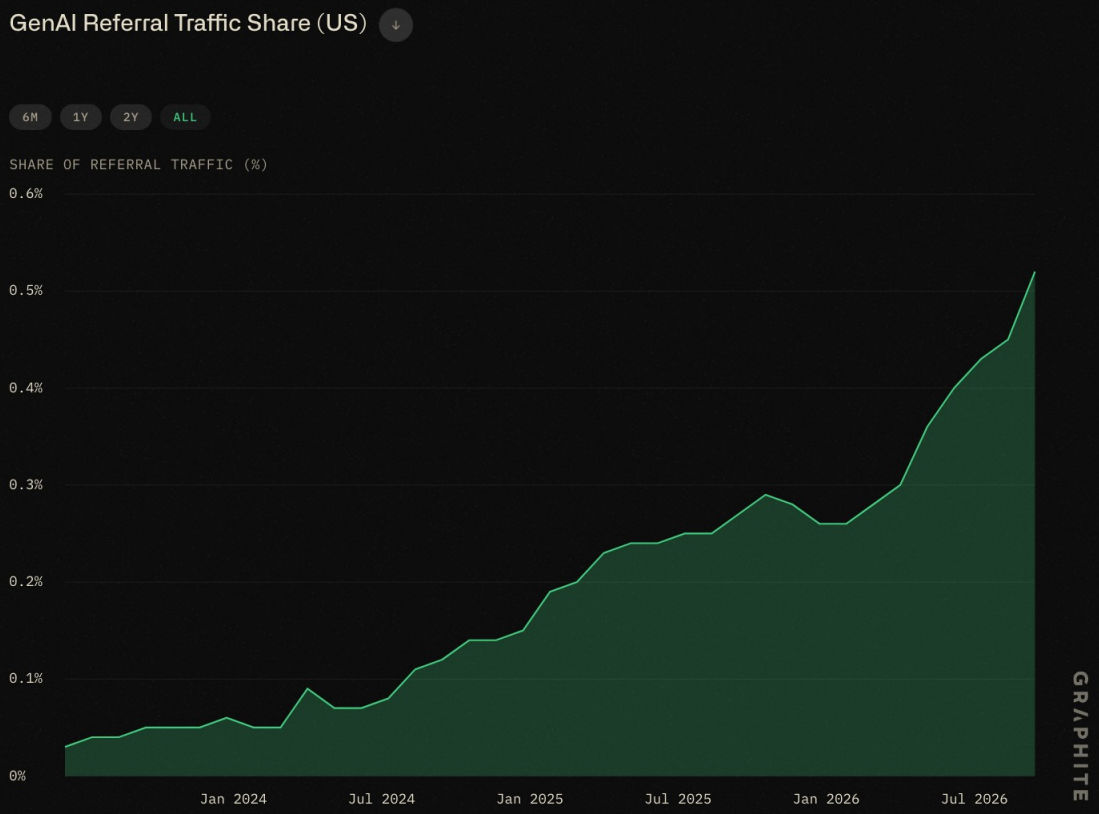


Monthly referral visits by product, US. Source: Similarweb.

GRAPHITE

REFERRAL TRAFFIC

GenAI Referral Traffic Share, US



Source: GenAI Referral Traffic Share (US). Similarweb.

REFERRAL TRAFFIC

Top 10 Sites Getting The Most Referral Traffic From Gen AI (May – July 2026)

ChatGPT

01	google.com
02	youtube.com
03	amazon.com
04	facebook.com
05	reddit.com
06	walmart.com
07	apple.com
08	instagram.com
09	bing.com
10	yahoo.com

Claude

01	google.com
02	amazon.com
03	bing.com
04	yahoo.com
05	youtube.com
06	microsoftonline.com
07	github.com
08	facebook.com
09	x.com
10	visualstudio.com

Gemini

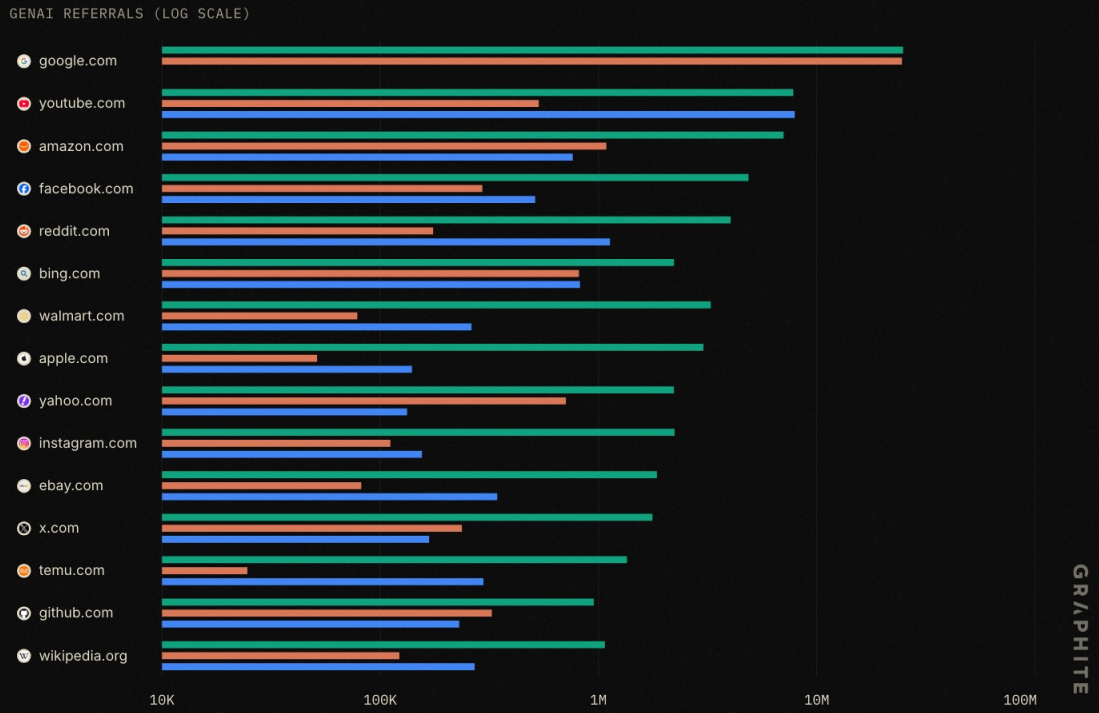
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02	reddit.com
03	bing.com
04	amazon.com
05	facebook.com
06	ebay.com
07	temu.com
08	wikipedia.org
09	walmart.com
10	github.com

Source: Top 10 Domains by AI Referral Traffic in the US for ChatGPT, Claude and Gemini. May - July 2026 Similarweb

REFERRAL TRAFFIC

Top 10 Sites Getting The Most Referral Traffic From Gen AI (May – July 2026)

Top Sites By AI Referral Traffic (May - July 2026. US)



Source: Top 10 Domains by AI Referral Traffic in the US for ChatGPT, Claude and Gemini. May - July 2026 Similarweb

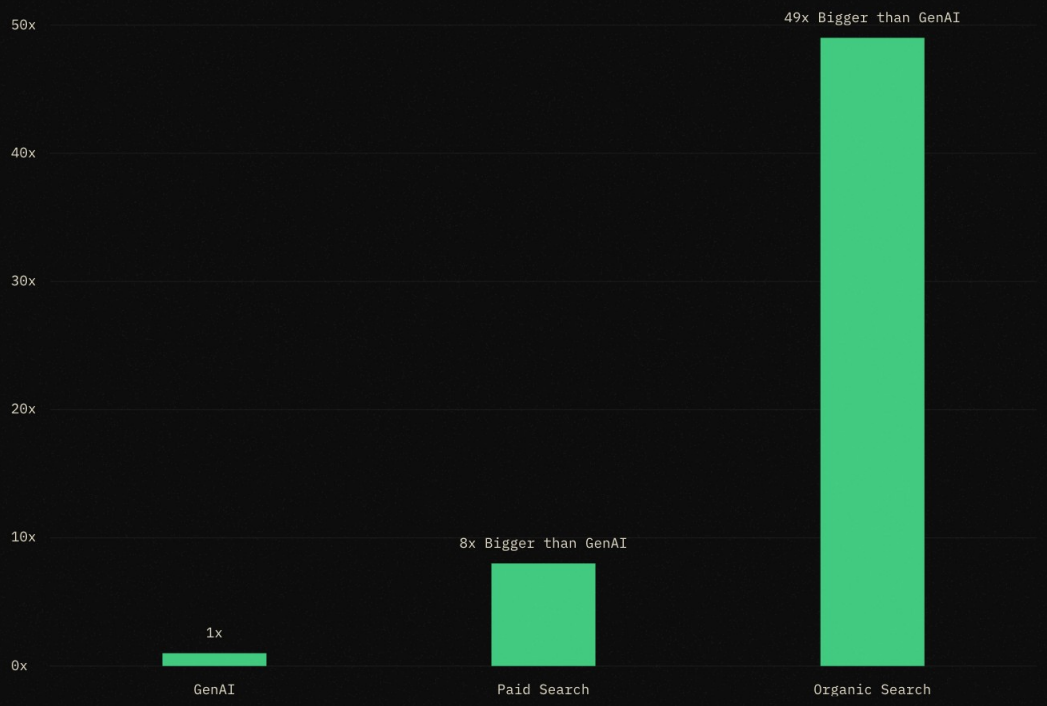
05 The AI Attribution Gap

THE AI ATTRIBUTION GAP

AI Accounts For Less Than 1% Of Traffic On Average To Websites

Channel traffic: Total, Organic, Paid and GenAI. Source: Similarweb.

Relative Traffic Volume by Channel (US, Q2 2026)



GRAPHITE

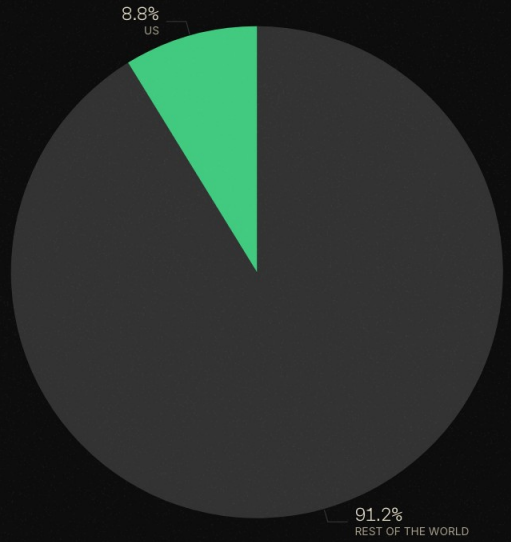
06

Growth By Region

GROWTH BY REGION

The US Represents 8.8% Of Worldwide AI Traffic

US Market Share (Sep 2026)



Total web and app sessions, US vs. rest of the world, Sep 2026. Source: Similarweb.

GRAPHITE

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