Adthena

Adthena holiday AI paid search intelligence report

The first holiday season of AI paid search

Adthena's read on how holiday shoppers now split across ChatGPT, AI Overviews, and Google Search.

204,489

ChatGPT ad placements tracked

Adthena

The landscape

One search, three different places

Holiday shoppers now split across three AI-shaped surfaces, each with its own behaviour and its own playbook.

ChatGPT Ads

204,489

ad placements, all markets

A brand new paid surface. Shoppers ask it what to buy, so ads land at the research stage.

AI Overviews

2.8B

AIO appearances, all regions

Google's AI answers appear above results on a huge share of queries, and brands can place ads inside the box (see next slide).

Google Search

38.7B

search volume, all regions

Still the giant by raw volume, but its own AI layer is where the momentum sits now.

Jun–Sep 2026.

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Scale vs momentum

Google owns volume. AI owns the growth.

Both are true at once, and holding them together is the point for any holiday plan.



Still the giant

38.7B

Google searches across the five categories, all regions. Nothing else is close on raw scale.



But the growth is on AI

+89%

US AI Overview appearances year on year, with UK/EU up +160% and Australia up +536%. The shift is on Google's own surface.

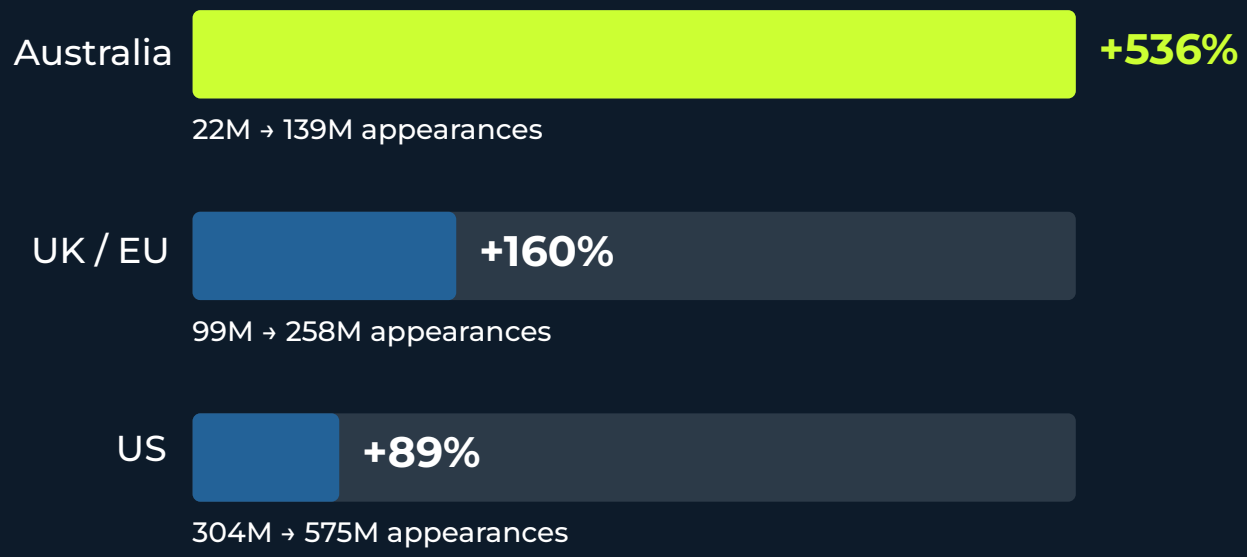
Google search volume Jun–Sep 2026, all regions. AIO YoY August, US.

Adthena

AI Overviews

AI Overviews went vertical

Appearances on Google results grew fast YoY (August 2025 to August 2026) in every market we tracked.



What this means

AIOs have crossed from novelty to norm. As Google increasingly answers inside the box, the ad slots beneath it lose visibility. The brands that appear within the AI answer will shape the decision before a shopper ever scrolls.

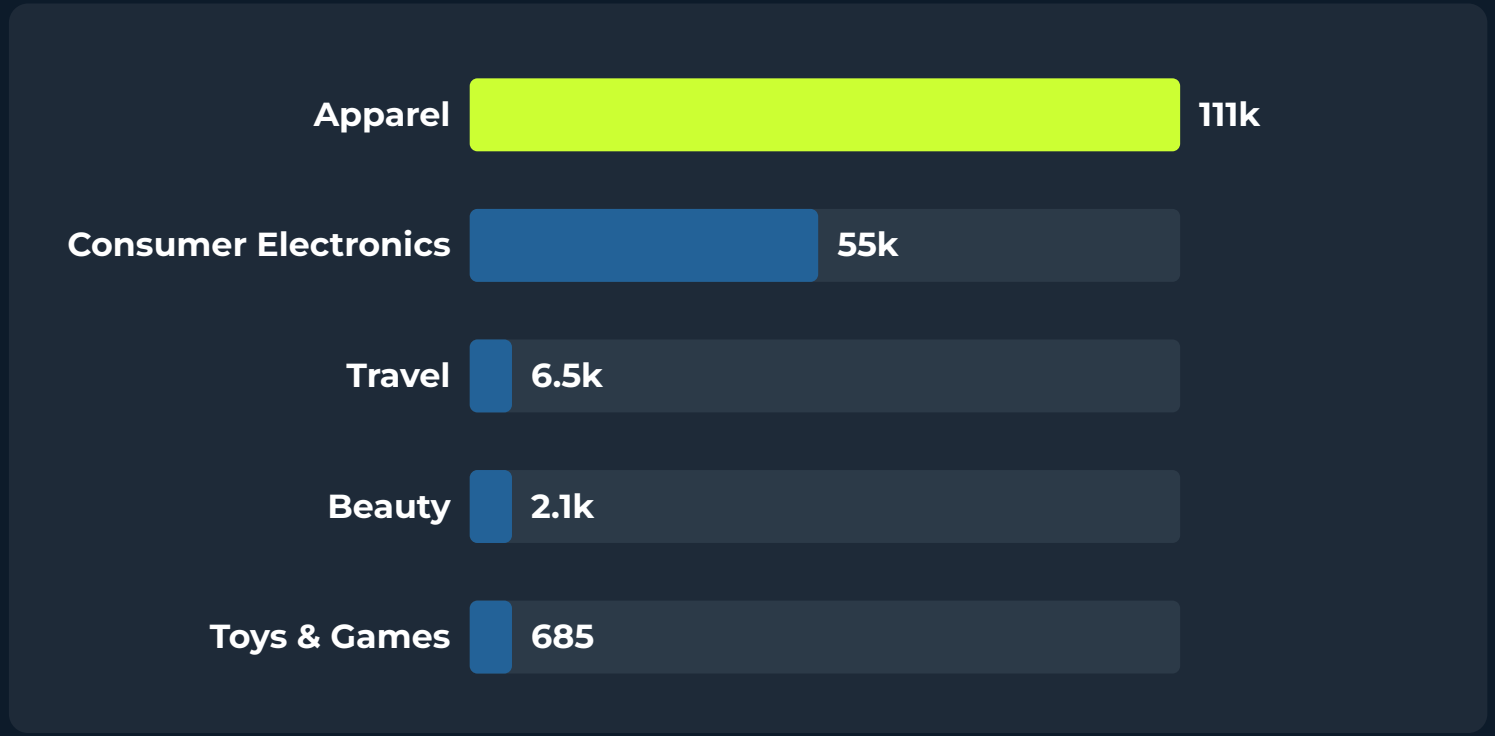
On a growing share of holiday searches, Google answers the question before the shopper reaches an ad or a link. Visibility inside the AI answer is becoming the game.

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Inside Google's AI box

Ads are running inside the AI answer

Paid ads served directly within Google's AI Overview and AI Mode panels, US.



The standout

111k

Apparel ad placements inside Google's AI box (US), the clear front-runner and well ahead of every other category.

Retail's biggest spenders are already showing up inside the AI answer, and apparel is leading the way in.

Google AI 175.1k total ad placements by category. US, Jun–Sep 2026.

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The headline

ChatGPT ads went from zero to 200,000+

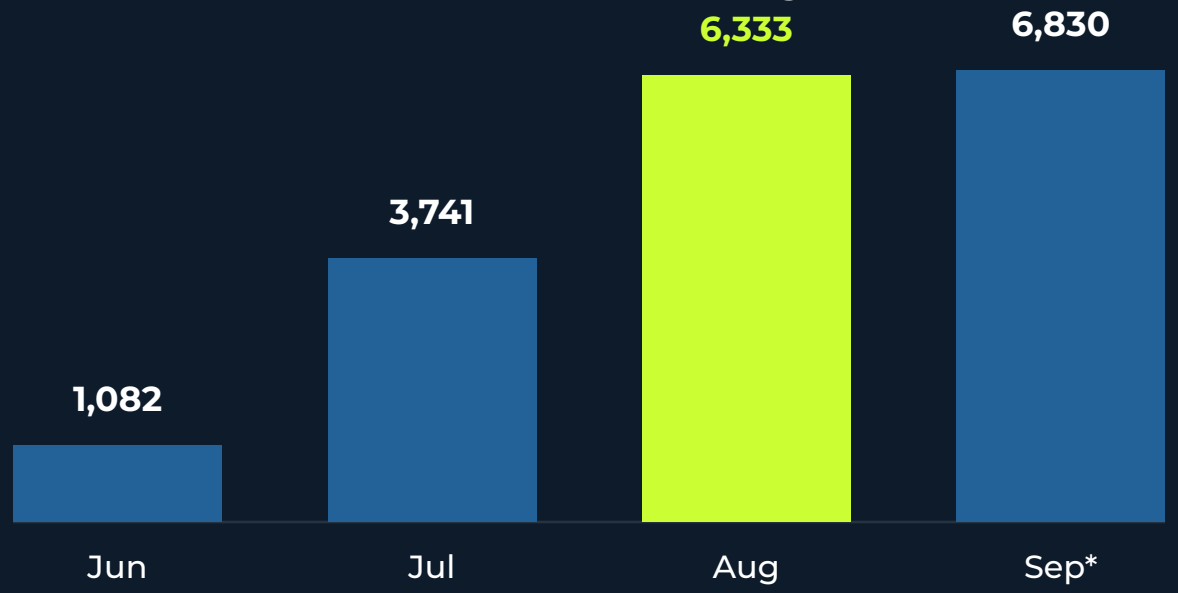
A paid channel that didn't exist twelve months ago, already at scale across five categories.

204,489

ChatGPT ad placements, across five categories: apparel, electronics, toys, beauty, and travel.

The platform didn't sell ads at all a year ago. This is a commercial surface that materialized in a single year, right as peak season approaches.

Distinct advertisers on ChatGPT, all categories



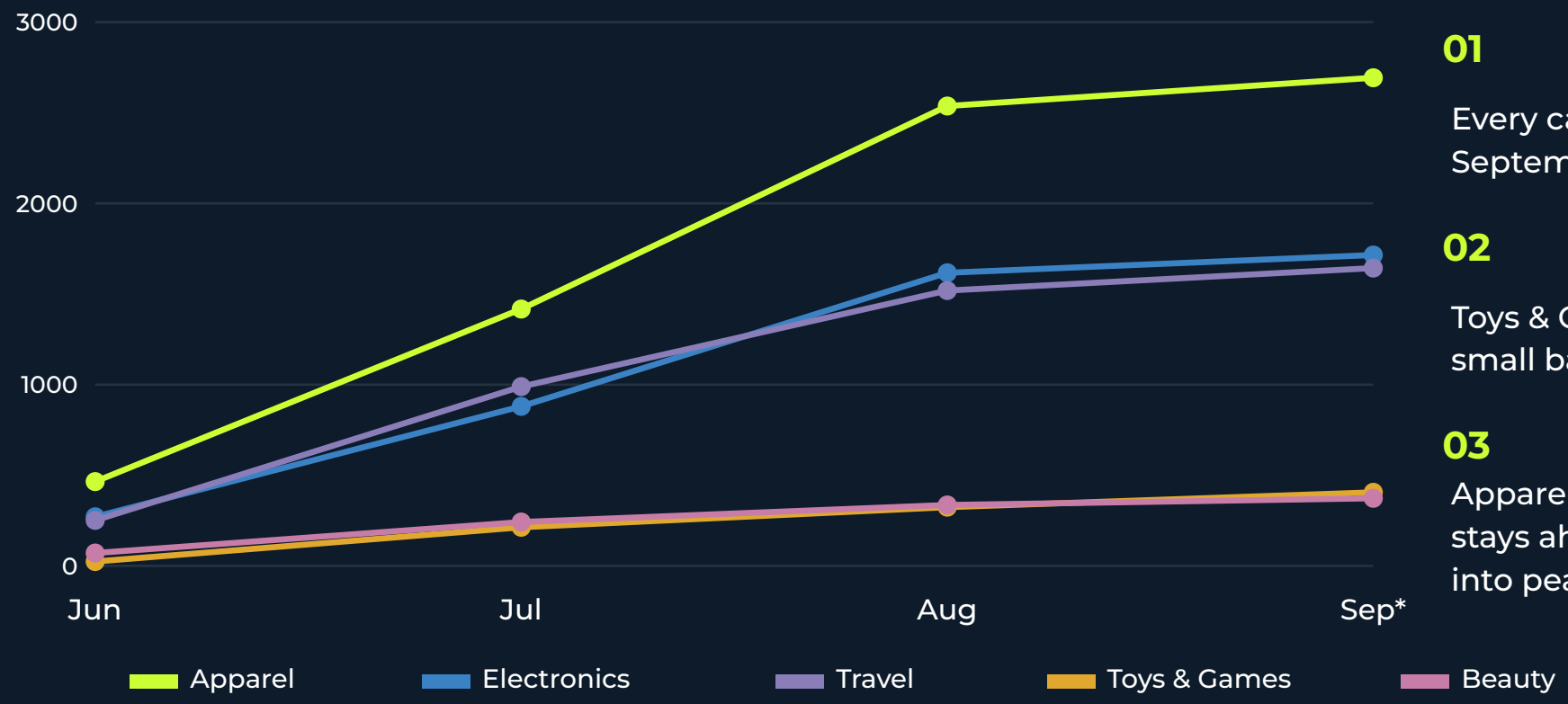
**projected data from Sept 20*

Adthena

The advertiser land-grab

Brands are piling into ChatGPT

Distinct brands running ChatGPT ads each month, by category. Every one started from zero this year.



*projected data from Sept 20

01

Every category climbs from June to September as brands claim ground early.

02

Toys & Games grew fastest of the five, off a small base. A classic pre-holiday ramp.

03

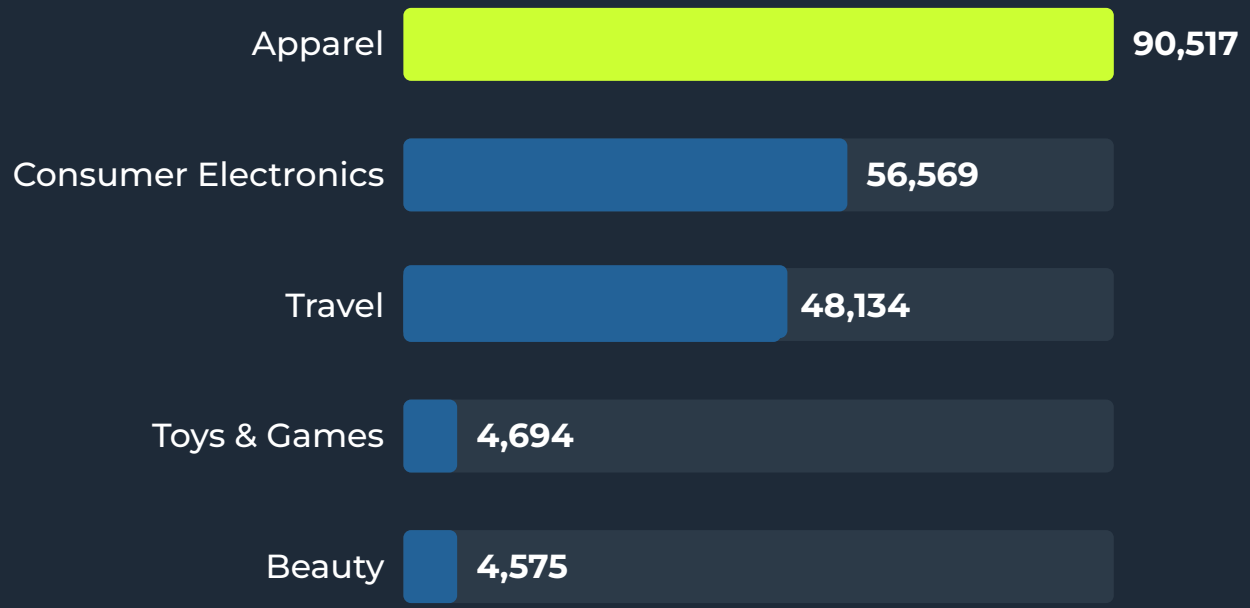
Apparel pulls away from the pack early and stays ahead, the clear category to watch into peak.

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Where the battle is

Apparel leads, toys come fast

Total ChatGPT ad placements by category. Where the ad volume already sits heading into peak.



Fastest grower

13×

Toys & Games advertiser growth from June to August, the steepest of all five categories.

Small in volume today, but the pre-holiday ramp is already visible.

Jun–Sep 2026, total ChatGPT ad placements by category.

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How people shop with AI

ChatGPT ads skew to research and discovery

Share of each category's ChatGPT ads that appeared against research and discovery queries, people comparing or asking what's best rather than naming a product.



For advertisers, the pattern is clear: ads are landing where people compare and ask what's best. Show up in those answers and you reach shoppers before a brand is locked in.

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What comes next

Four predictions for holiday peak

Four calls we're willing to make, based on where the data is heading.

01

ChatGPT ads go mainstream within a year

Zero to 200k+ in a few months. By 2027, a ChatGPT budget is as normal as a Google one.

02

The AI box overtakes the blue links

Within 18 months, Google's AI box carries more retail ad volume than the links below it.

03

A major brand loses a category this peak

Not for lack of spend, but because a rival owned the AI answer and they didn't show up.

04

This is the last Google-default Black Friday

By 2027 the fight is who owns the AI answer. Treat it as next year's problem and you're already behind.

Predictions based on Adthena data to Sep 2026. Not a guarantee of future results.

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The big prediction

ChatGPT Ads will price the moment of decision

Google today

Reconstructs intent after the fact

Smart Bidding predicts how likely each auction is to convert and bids to match. “All-inclusive Belek, October half term, family of four” costs far more than “Turkey holidays.” Google infers this from the query and search history, then stitches the journey together with attribution.

ChatGPT next

Watches intent unfold live

Google reconstructs the path from separate searches. ChatGPT watches it unfold in one conversation. By the time someone compares two Belek hotels, the chat already holds their destination, dates, budget and who's travelling, a far richer conversion signal than any single query.

What we expect

With conversion bidding live, spend piles onto the last few turns before a booking, and CPCs there climb well above the rest of the conversation. The open question: does OpenAI set its own intent-based floor prices?

For advertisers: the Conversions API is a priority now. The model can only reward intent it can measure.

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What to do before peak

Four moves you can make this week

No account linking required. These work for any marketer heading into peak.

01

Check your ChatGPT visibility

See whether your brand shows up in ChatGPT answers for your top 10 category terms. If you're absent, so is your consideration.

02

Scout the AI box in your vertical

Look at who's bidding inside Google's AI box in your category. The early movers are claiming space cheaply.

03

Move a test budget now

Shift a test budget toward AI-surface visibility before Black Friday, not after it, when costs and competition climb.

04

Track it weekly

These surfaces move fast. Last month's picture is already stale, so check position every week through peak.

You can start these today. Adthena makes them precise, tied to your own accounts and competitors.

Adthena

What it means for search teams

Search didn't get replaced. It multiplied.

More than 200,000 ChatGPT placements from a standing start, AI Overviews multiplying on Google, and shoppers asking AI what to buy. Treat ChatGPT as a live channel, win the AI answer, and show up at the research stage.

Track ChatGPT Ads free for 21 days

Adthena is the leader in AI search intelligence, tracking where ads run today on Google and where they're moving next on ChatGPT and emerging AI surfaces.