

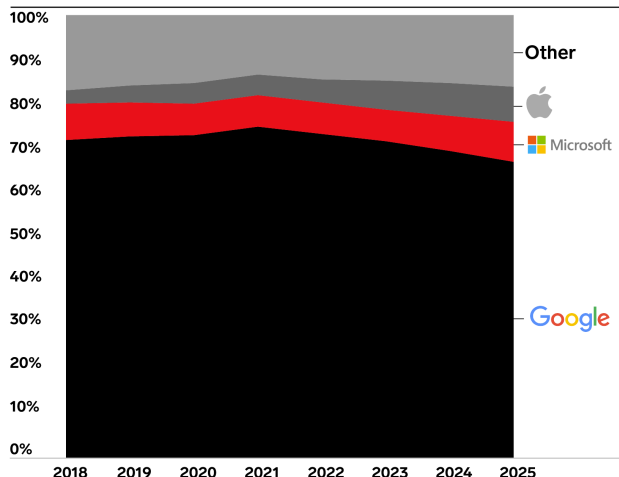
Is Google past its search advertising prime?

Article

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US Nonretail Search Advertising Market Share, by Company, 2018-2025

% of total nonretail search ad revenues



Note: includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices for all formats mentioned; includes contextual text links, paid inclusion, paid listings (paid search), and SEO; net ad revenues after companies pay traffic acquisition costs (TAC) to partner sites; excludes retailers; Google includes YouTube advertising revenues
Source: eMarketer, March 2023

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eMarketer | InsiderIntelligence.com

Key stat: Google's share of US nonretail search ad spend has declined since 2021, when the company saw \$49.41 billion in US search ad revenues, according to our forecast. Among Google's rivals outside of retail, both Microsoft and Apple are growing their search revenues faster.

Beyond the chart:

- Microsoft's strong future growth can be attributed to early moves it made in conversational search with its ChatGPT partnership.
- Apple's search growth will come from the success of App Store ads. The company recently announced \$1.1 trillion in **App Store developer billings and sales** in 2022.

Use this chart:

- Plan how much money to allocate to search.
- Consider your search advertising mix.

More like this:

- **Amazon gains on Google and Meta, as the duopoly becomes a triopoly**

- May ad updates from Google, YouTube, Meta highlight AI, social media, and retail media opportunities
- How marketers should rethink digital ad channels, based on our forecast data
- Search Ad Spending Forecast and Trends H1 2023 (Insider Intelligence subscription required)

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- 6/7 - Social's slow show
- 6/6 - App-y shopping
- 6/5 - In AI we trust?
- 6/2 - Commercial break-through
- 6/1 - One fad Apple

Methodology: Estimates are based on the analysis of various elements related to the ad spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers and other industry leaders.