

Bespoke Survey Research

August 2023

Search

Volume 4 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: GOOG, MSFT.

KPIs and Key questions

1. ChatGPT awareness has increased over time, but in both our quarterly survey and our monthly tracker, the rate at which adoption has increased slowed a bit sequentially.
2. Among those who have tried ChatGPT, NPS has declined sequentially from February to April and then again from April to August. Earlier adopters typically register stronger NPS scores, but it is a trend worth making note of, nevertheless.
3. Consumer opinion of ChatGPT is mostly unchanged over time, if just a bit more negative compared to earlier in the year.
4. Interest in using ChatGPT or AI Chatbots is mostly unchanged across quarterly volumes in 2023.
5. Google is important to consumers and has a great deal of mindshare across search categories. The one search journey category in which Google does not receive a plurality or majority of responses is when consumers are searching for products they would like to buy.

Noteworthy Stats:

14.3% Of respondents have tried ChatGPT.

16.1% Of respondents have a very positive view of ChatGPT.

12.5% Of respondents would be willing to pay a monthly fee to have access to an AI chatbot like ChatGPT.

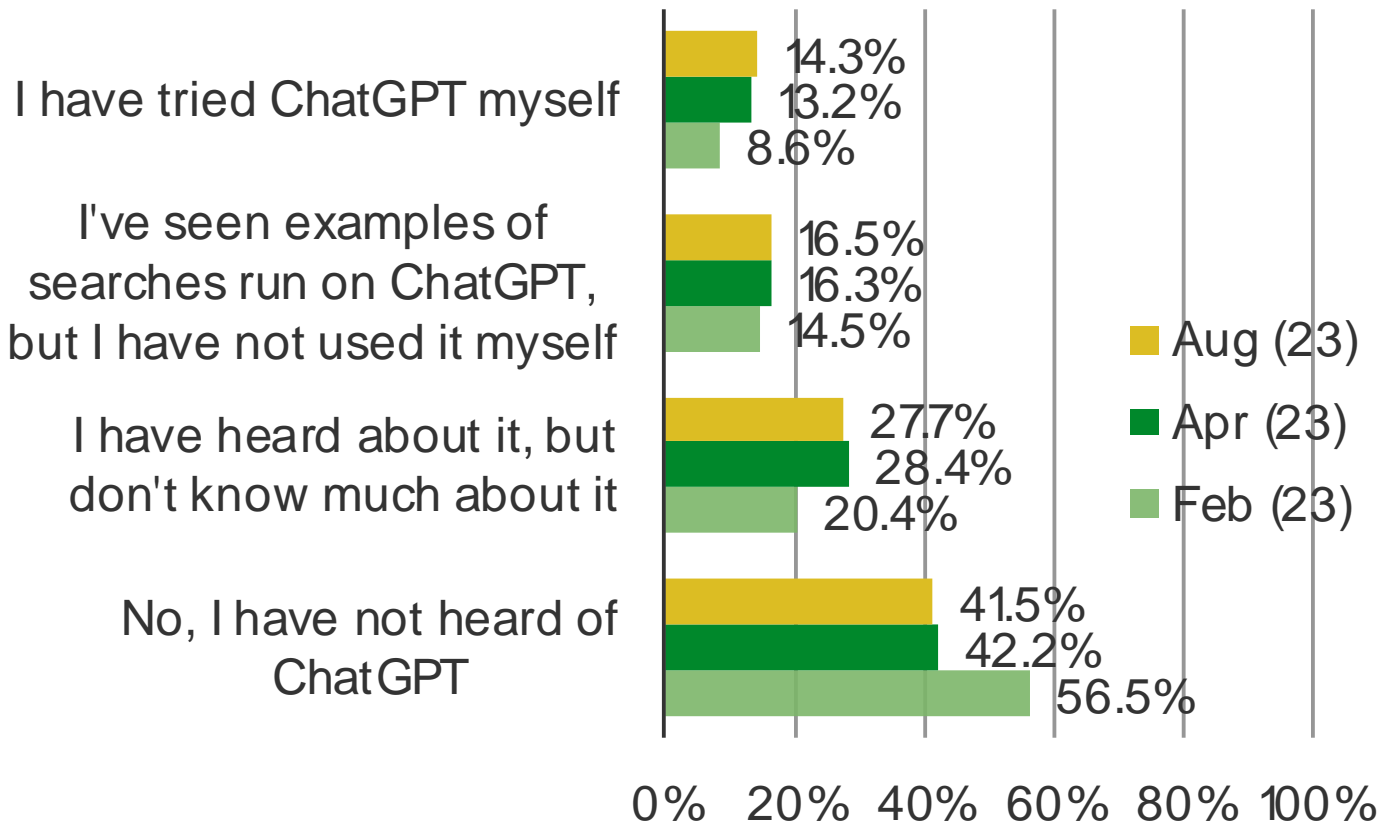
26.8% Of respondents think AI powered chatbots are trustworthy.

Search

SEARCH

BEFORE TAKING THIS SURVEY, HAD YOU HEARD OF CHATGPT?

Posed to all respondents.



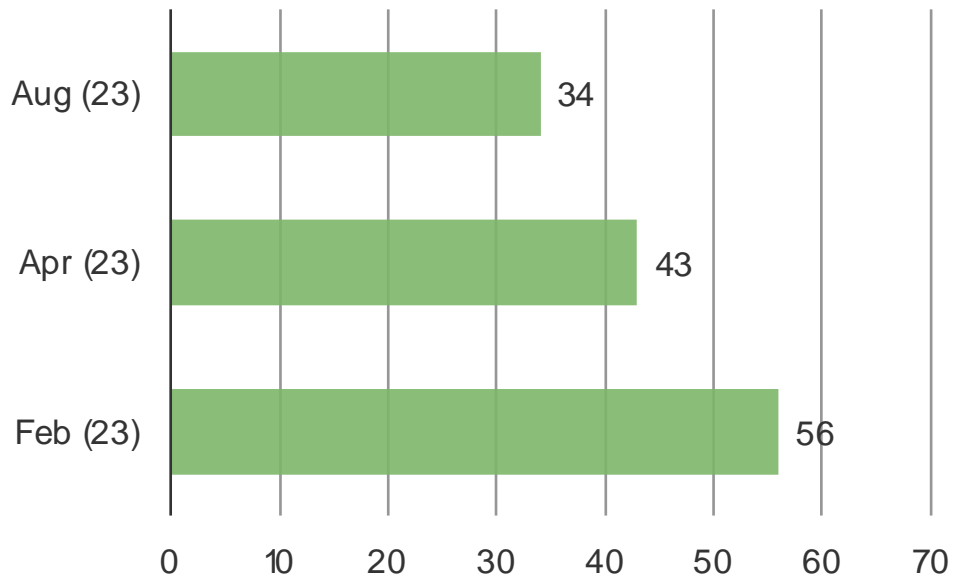
IF YOU HAD TO USE ONE ADJECTIVE TO DESCRIBE CHATGPT, WHAT WOULD IT BE?

Posed to all respondents who have at least heard of ChatGPT.



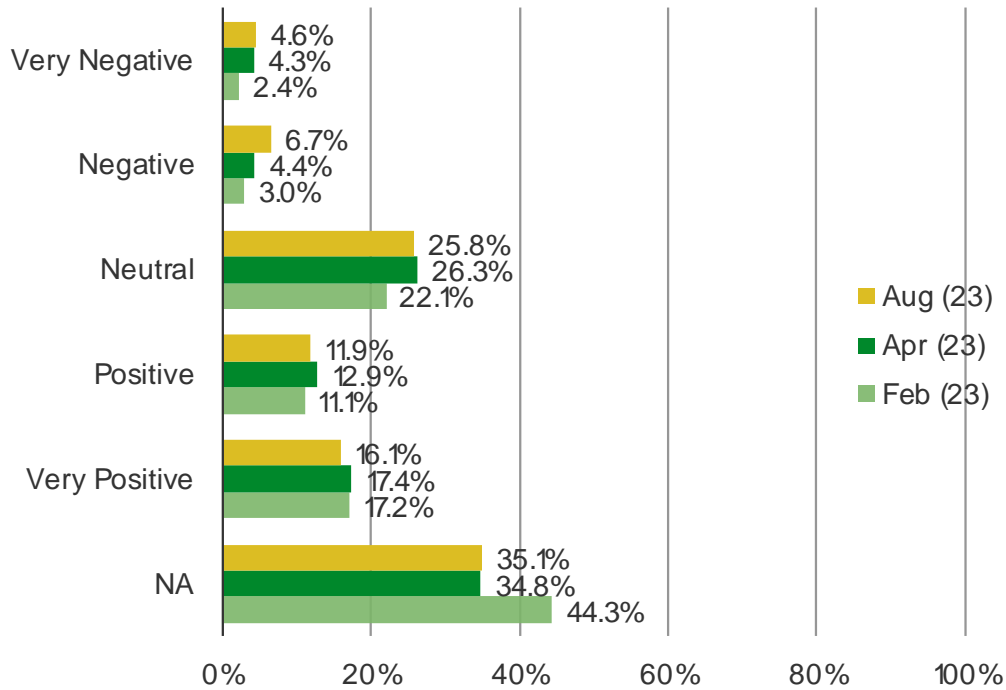
HOW LIKELY IS IT THAT YOU WOULD RECOMMEND CHATGPT TO A FRIEND OR COLLEAGUE?

Posed to all respondents who have tried ChatGPT (N = 219)

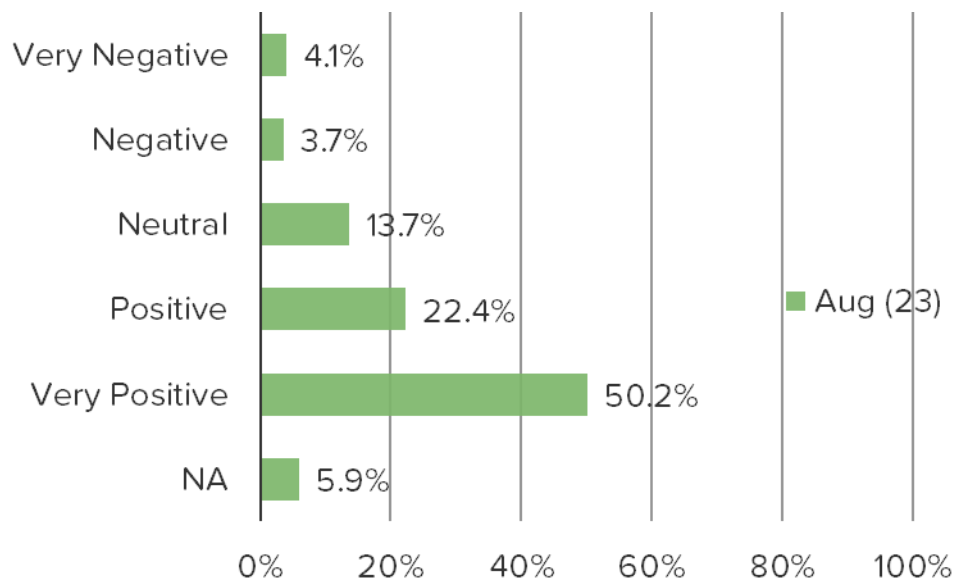


WHAT IS YOUR OPINION OF CHATGPT?

Posed to all respondents.

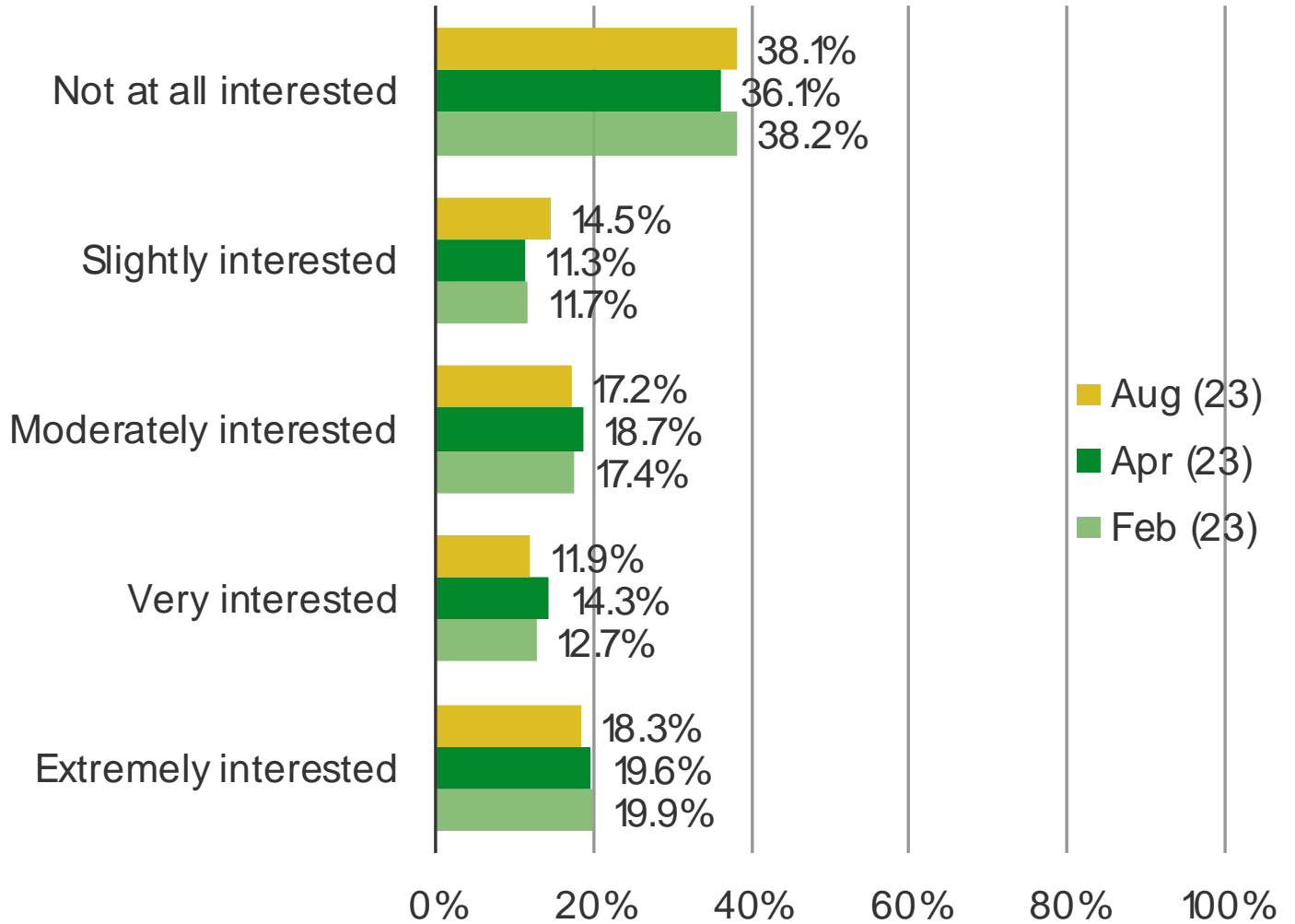


Focusing on respondents who have tried ChatGPT (N = 219)



CHATGPT IS AN ONLINE CHATBOT THAT USES ARTIFICIAL INTELLIGENCE TO RESPOND TO QUESTIONS POSED TO IT WITH HUMAN-LIKE TEXT BASED ON THE INPUT GIVEN TO IT.DO YOU HAVE ANY INTEREST IN USING THIS SORT OF SEARCH FUNCTIONALITY?

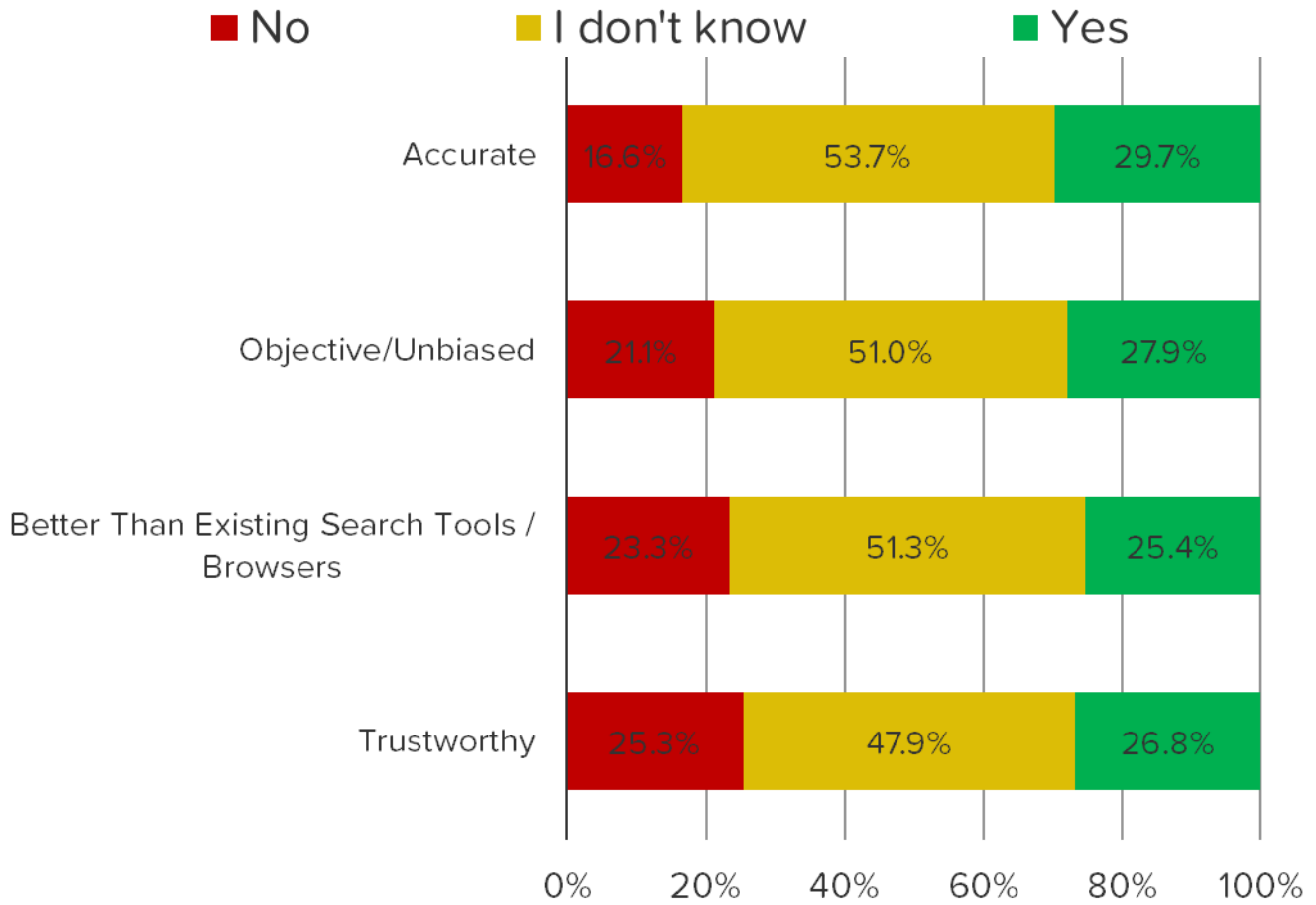
Posed to all respondents.



IN YOUR OPINION, DO YOU THINK AI POWERED CHATBOTS LIKE CHATGPT OR OTHERS THAT COME OUT WOULD BE...

Posed to all respondents.

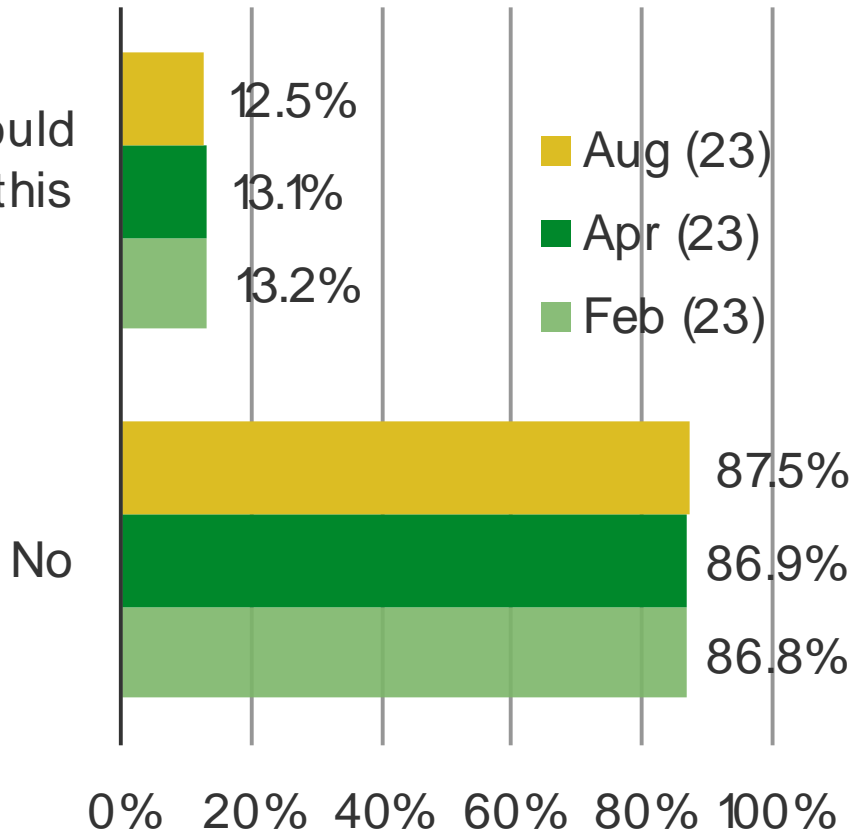
AUGUST 2023



WOULD YOU BE WILLING TO PAY A MONTHLY FEE TO HAVE ACCESS TO AN AI POWERED CHATBOT LIKE CHATGPT?

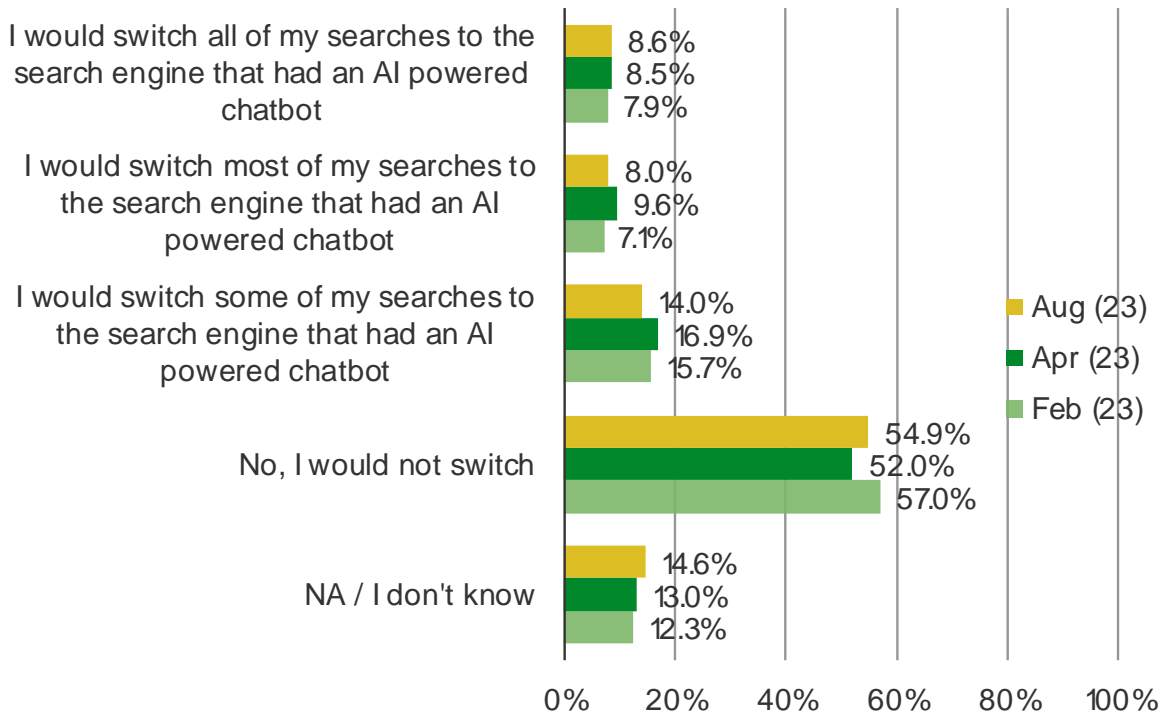
Posed to all respondents.

Yes (about how much would you be willing to pay for this per month?)

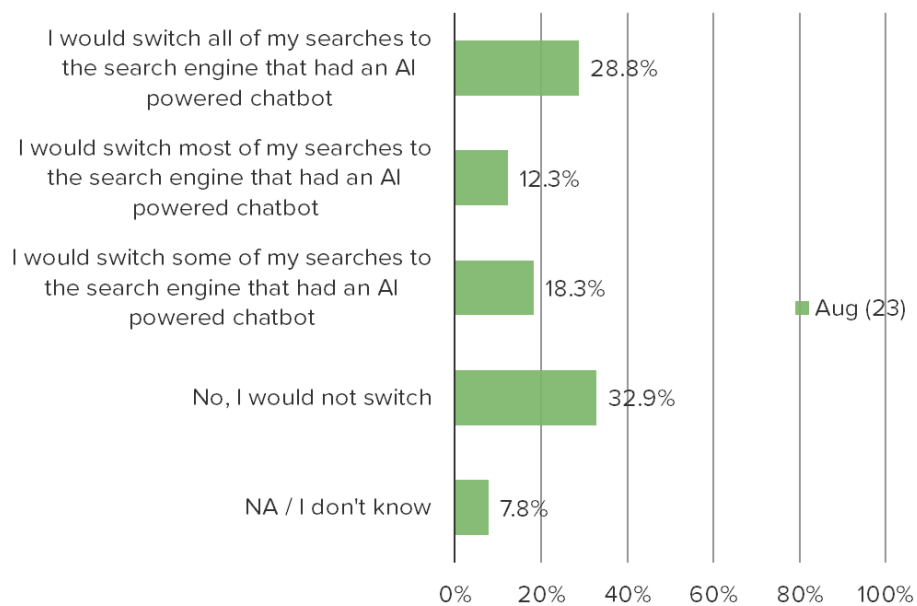


IF THE SEARCH ENGINE THAT YOU CURRENTLY USE MOST OFTEN ONLINE DID NOT HAVE AN AI POWERED CHATBOT LIKE CHATGPT AND ANOTHER SEARCH ENGINE DID, WOULD YOU SWITCH TO THE SEARCH ENGINE THAT HAD THE AI POWERED CHATBOT?

Posed to all respondents.



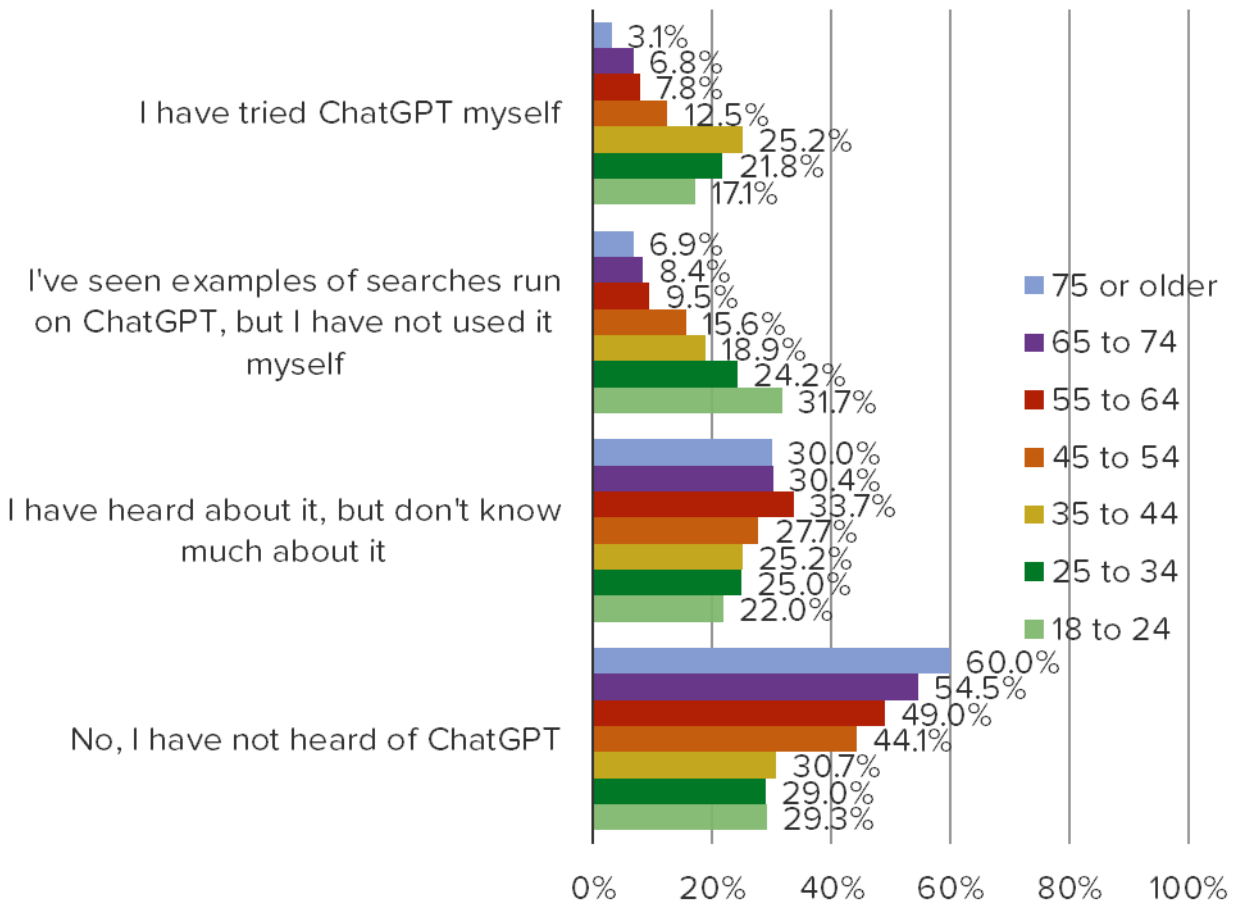
Focusing on respondents who have tried ChatGPT (Aug 23)



COHORT ANALYSIS: CHATGPT ENGAGEMENT

Posed to all respondents.

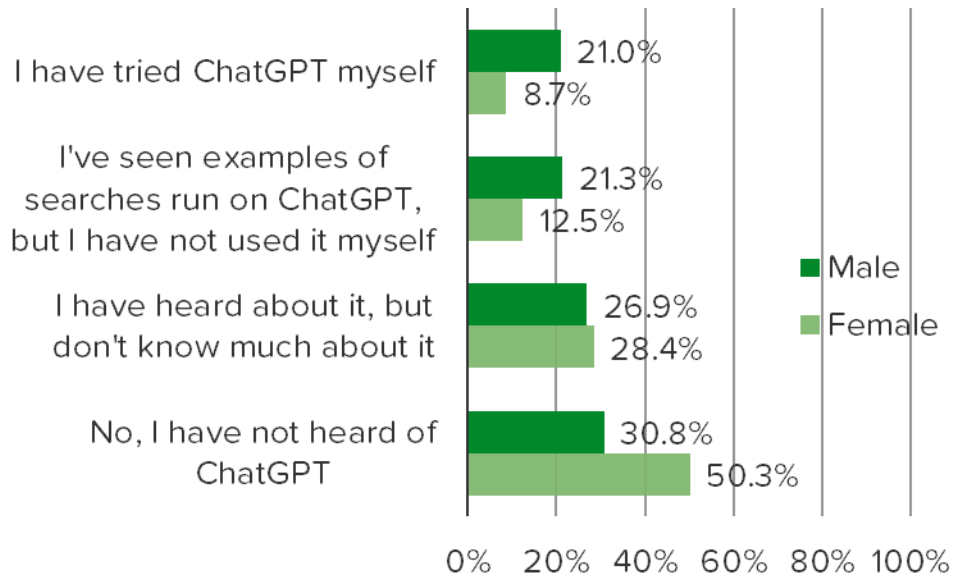
AUGUST 2023



COHORT ANALYSIS: CHATGPT ENGAGEMENT

Posed to all respondents.

AUGUST 2023

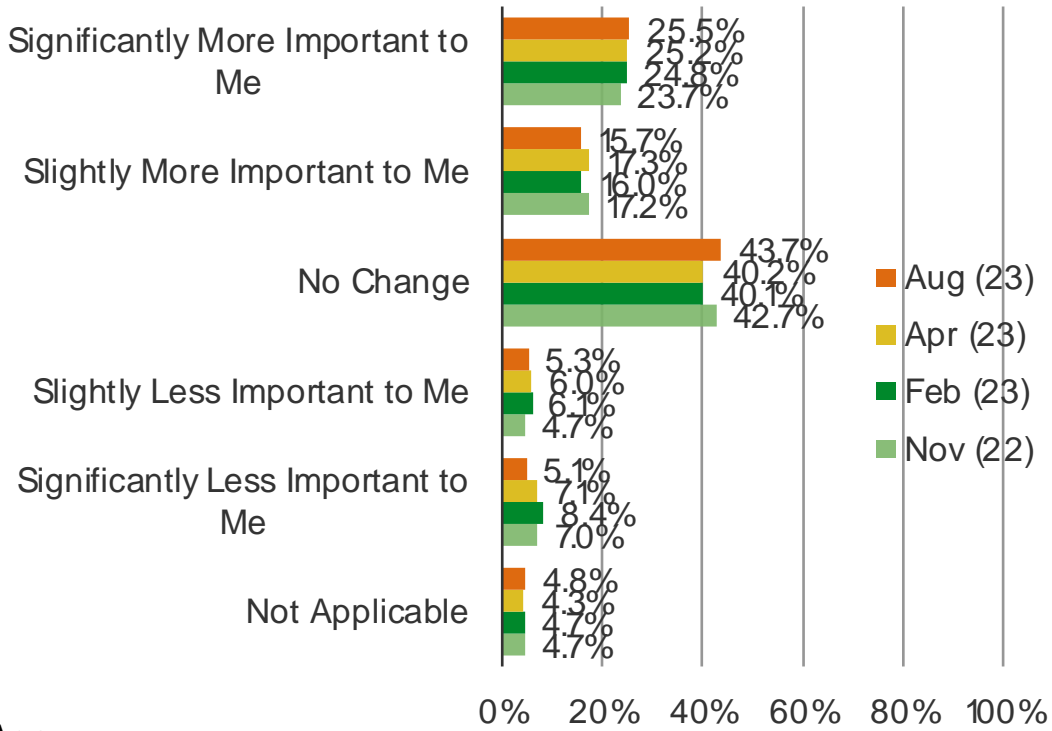


Search

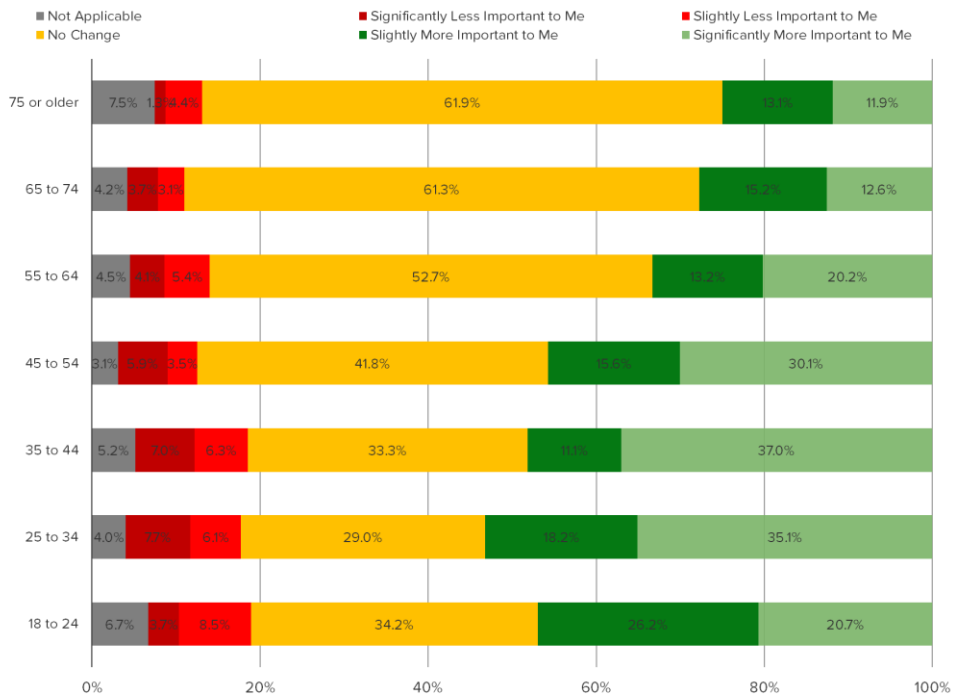
SEARCH

FOR YOU PERSONALLY, IS GOOGLE SEARCH BECOMING....

Posed to all respondents.

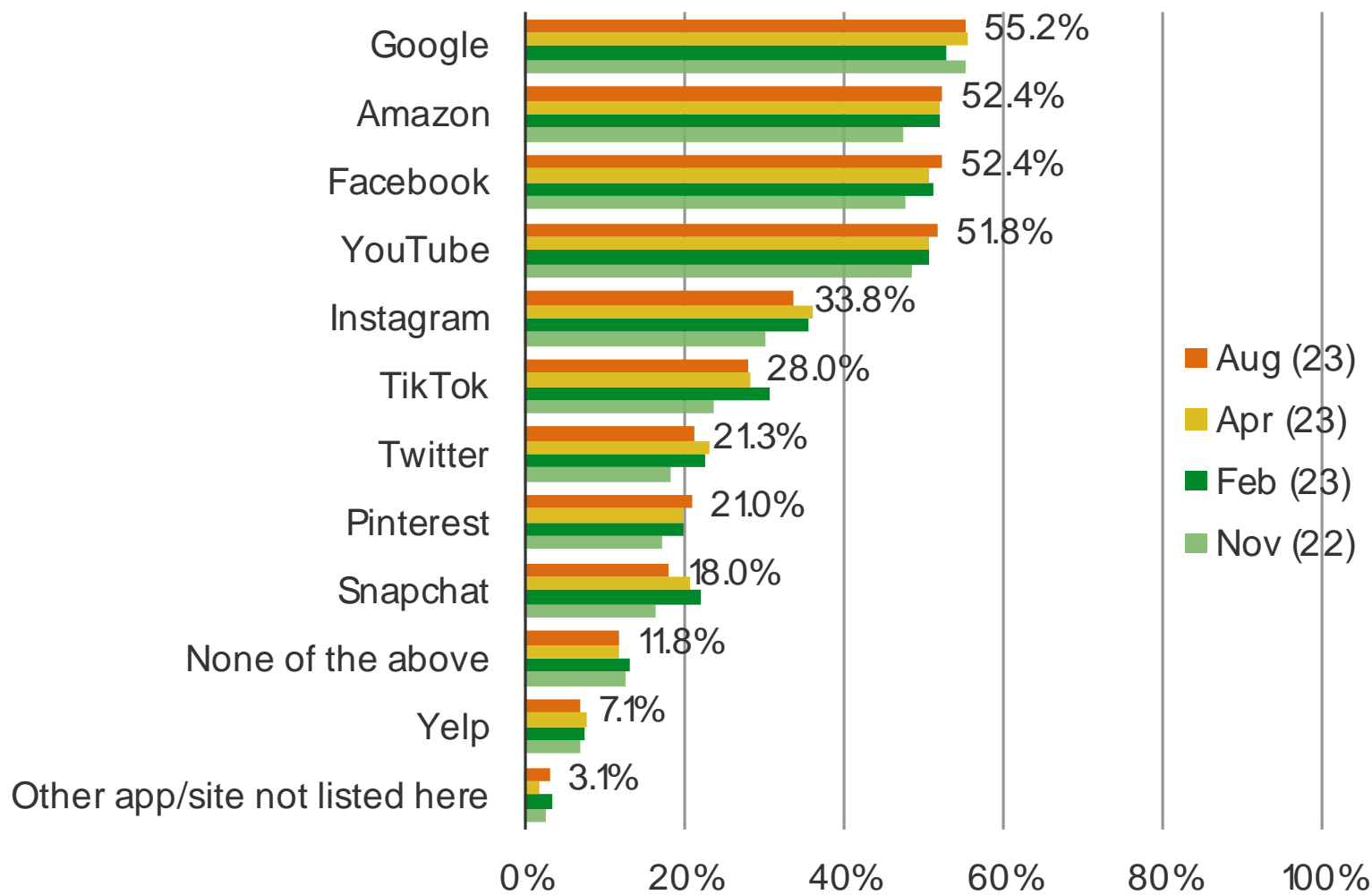


Cross-Tab by Age



DO YOU USE ANY OF THE FOLLOWING TO REGULARLY OR OCCASIONALLY LOOK THINGS UP ON YOUR PHONE? SELECT ALL THAT APPLY

Posed to all respondents.



Cross-tabbing the data by age...

	None of the above	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	6.7%	52.4%	48.8%	52.4%	34.8%	26.2%	34.2%	51.2%	6.7%	45.1%	20.7%
25 to 34	4.4%	44.4%	54.0%	54.0%	55.2%	35.5%	32.7%	60.9%	6.1%	56.1%	22.6%
35 to 44	5.6%	39.6%	57.8%	47.8%	64.8%	30.4%	27.8%	57.0%	11.1%	60.4%	28.9%
45 to 54	3.9%	27.3%	64.1%	35.2%	66.0%	20.7%	15.2%	68.0%	7.0%	57.4%	20.7%
55 to 64	15.6%	14.8%	61.3%	21.4%	51.4%	13.6%	6.2%	52.3%	4.5%	52.3%	18.9%
65 to 74	23.0%	7.9%	50.3%	10.0%	39.8%	9.4%	4.2%	34.6%	7.9%	47.1%	16.2%
75 or older	32.5%	3.1%	41.3%	5.0%	39.4%	6.3%	1.3%	23.1%	5.0%	39.4%	14.4%

WHAT DO YOU FIND THE FOLLOWING MOST HELPFUL TO SEARCH FOR?

Posed to all respondents who use the below.

TWITTER



SNAPCHAT



YOUTUBE



YELP



WHAT DO YOU FIND THE FOLLOWING MOST HELPFUL TO SEARCH FOR?

Posed to all respondents who use the below.

AMAZON

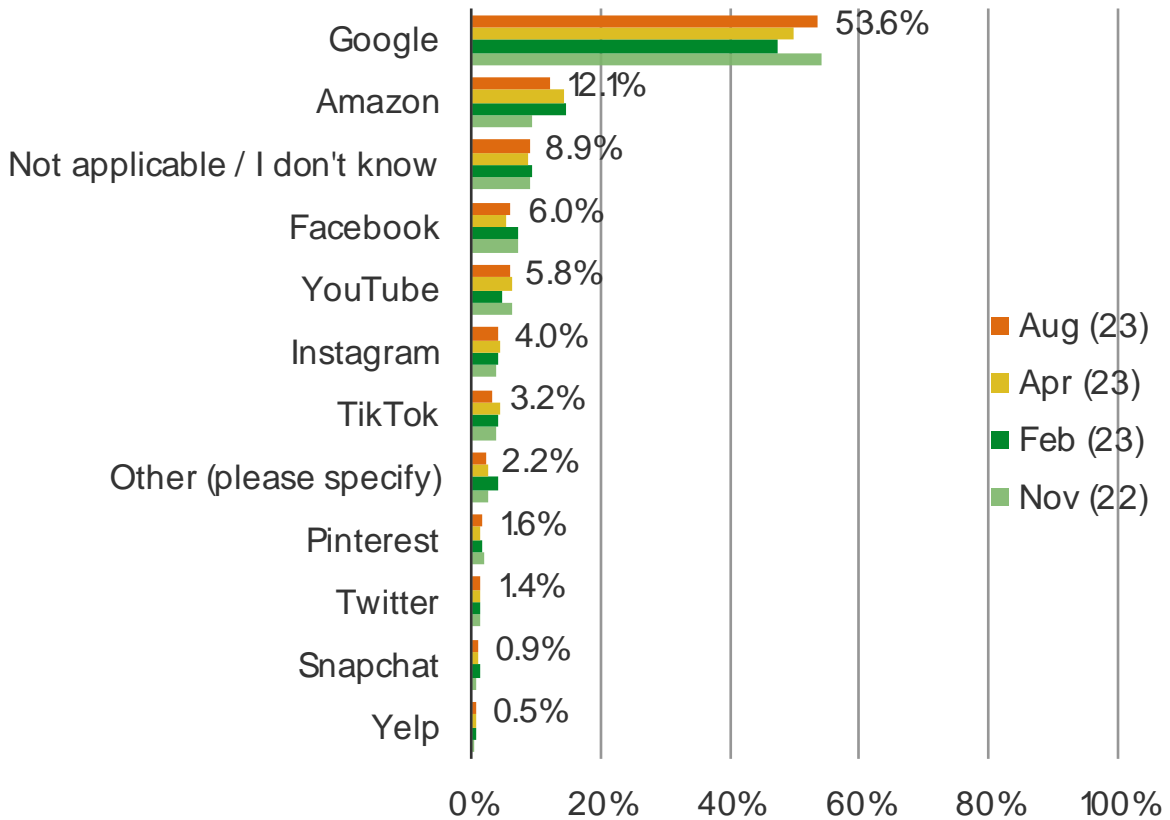


PINTEREST



WHEN YOU NEED TO SEARCH FOR SOMETHING ONLINE/ON YOUR PHONE, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

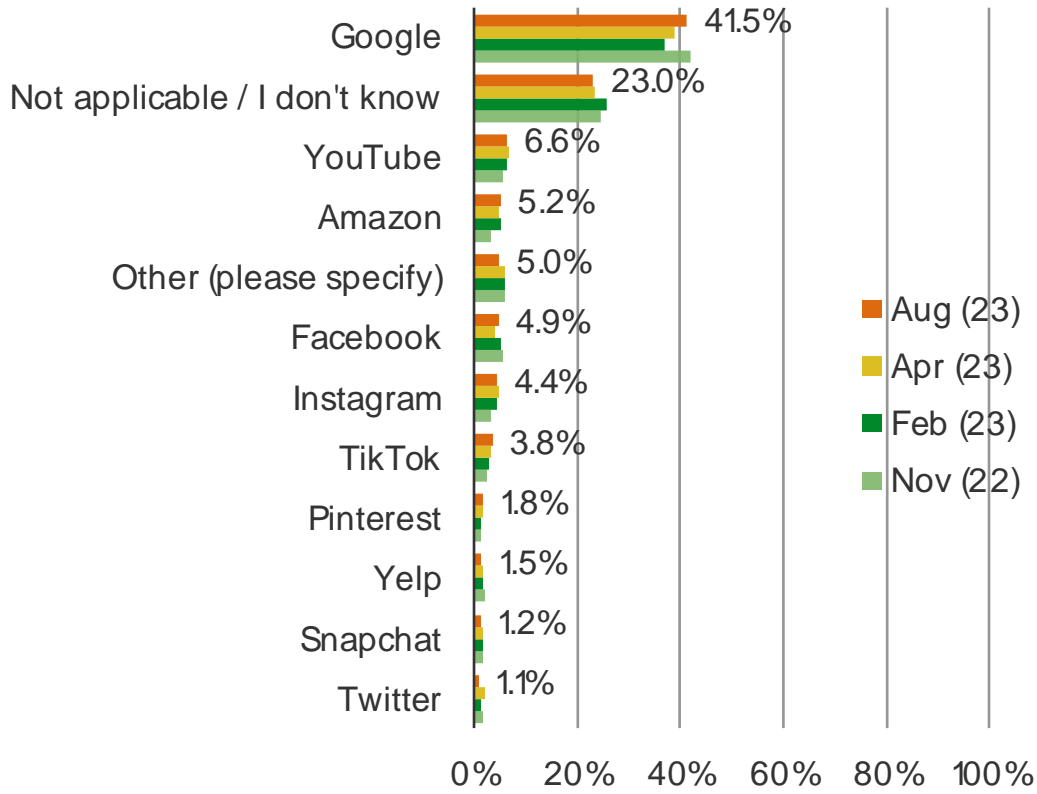


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	9.8%	39.0%	9.8%	4.9%	2.4%	3.1%	7.3%	0.0%	12.8%	3.7%	0.0%
25 to 34	6.9%	44.0%	7.3%	9.7%	3.6%	1.6%	9.7%	1.2%	10.1%	2.0%	0.4%
35 to 44	4.4%	46.7%	7.0%	10.4%	1.5%	0.7%	5.6%	0.4%	15.2%	1.9%	0.4%
45 to 54	1.6%	59.8%	3.1%	7.0%	1.6%	0.8%	5.9%	0.8%	10.9%	2.3%	2.7%
55 to 64	0.0%	68.7%	0.0%	2.9%	0.0%	0.0%	4.9%	0.0%	9.5%	0.0%	3.3%
65 to 74	0.0%	61.3%	0.0%	1.1%	0.0%	0.0%	3.7%	0.5%	11.5%	1.1%	5.2%
75 or older	0.0%	53.1%	0.0%	3.1%	0.0%	0.0%	2.5%	0.6%	15.6%	0.0%	3.8%

WHEN YOU NEED TO SEARCH FOR TRAVEL/VACATIONS, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

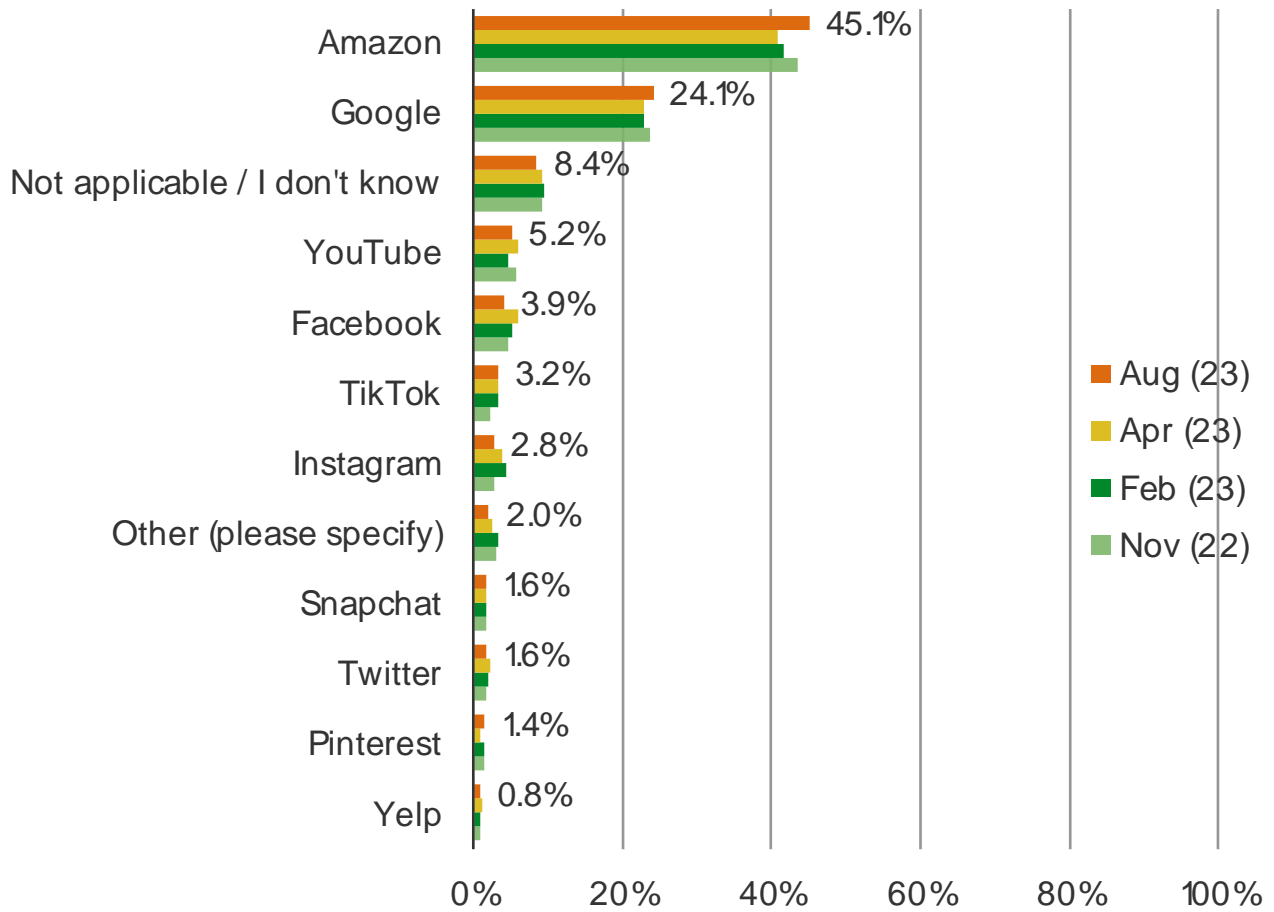


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	12.2%	34.2%	9.2%	4.9%	2.4%	5.5%	9.2%	1.8%	8.5%	2.4%	0.0%
25 to 34	8.5%	33.9%	9.3%	8.5%	1.6%	2.4%	11.7%	2.8%	11.3%	2.4%	0.4%
35 to 44	3.7%	45.9%	6.3%	7.4%	2.6%	1.1%	6.7%	1.9%	8.9%	2.2%	1.9%
45 to 54	2.0%	47.3%	3.5%	7.0%	0.8%	0.4%	8.6%	1.2%	3.5%	3.1%	4.3%
55 to 64	0.4%	47.7%	0.8%	1.2%	0.0%	0.0%	4.1%	0.8%	0.8%	0.4%	6.2%
65 to 74	0.5%	39.3%	0.5%	2.1%	0.0%	0.0%	3.1%	1.6%	1.1%	1.1%	11.5%
75 or older	0.0%	36.9%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.6%	0.0%	14.4%

WHEN YOU NEED TO SEARCH FOR PRODUCTS YOU WOULD LIKE TO BUY, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

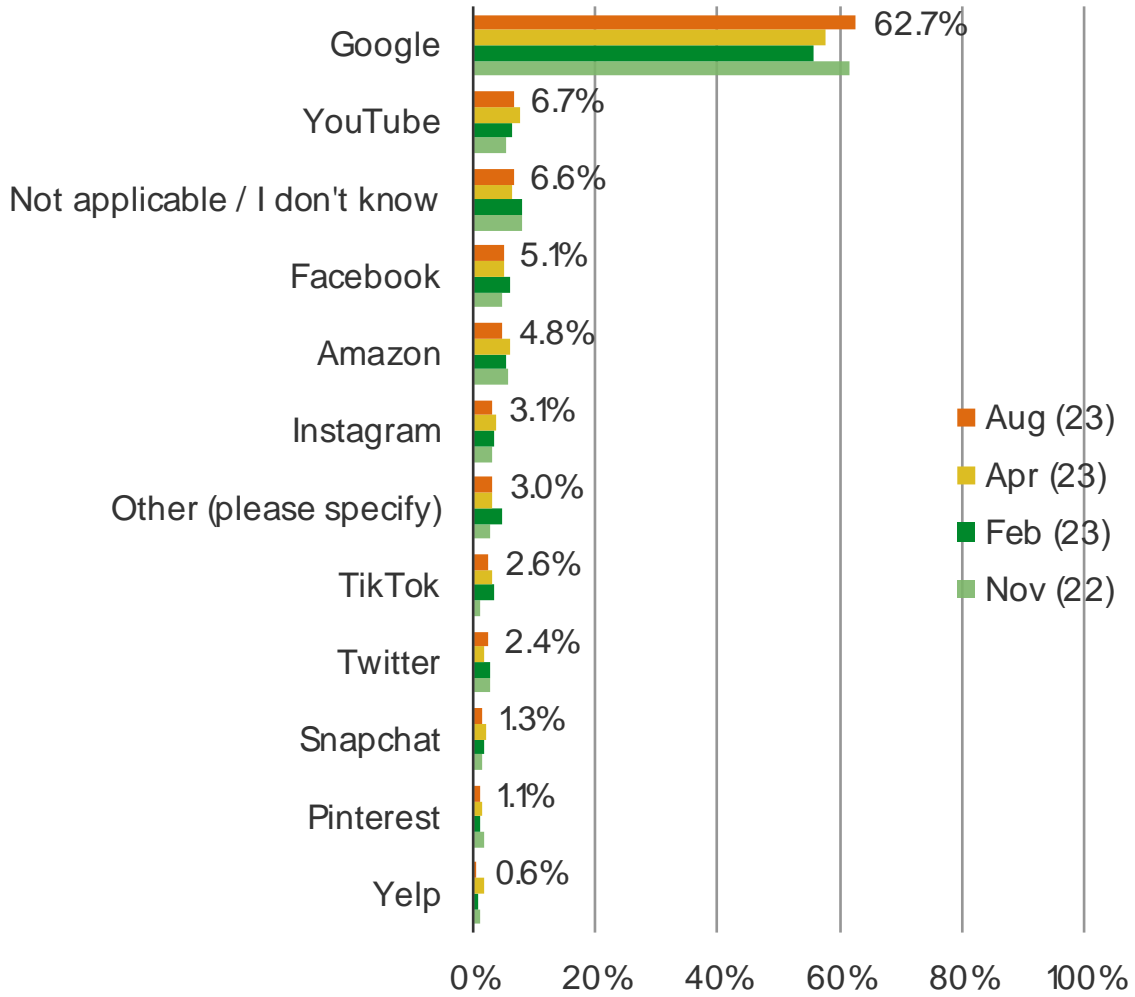


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	11.0%	20.7%	4.3%	3.7%	3.1%	5.5%	8.5%	2.4%	31.7%	0.0%	1.2%
25 to 34	6.5%	19.0%	5.7%	6.5%	2.8%	2.8%	12.9%	1.2%	36.3%	2.0%	0.0%
35 to 44	3.0%	22.2%	5.6%	6.3%	2.2%	2.6%	4.1%	1.1%	43.0%	2.2%	0.7%
45 to 54	2.3%	21.9%	2.7%	4.7%	2.3%	0.4%	7.4%	0.4%	48.1%	2.7%	2.3%
55 to 64	0.4%	32.5%	0.0%	2.5%	0.0%	0.0%	0.8%	0.0%	49.0%	0.0%	3.3%
65 to 74	0.0%	25.7%	0.0%	1.6%	0.0%	0.0%	0.5%	0.0%	55.0%	1.1%	4.2%
75 or older	0.0%	27.5%	0.0%	0.0%	0.0%	0.0%	0.6%	0.6%	53.8%	0.6%	2.5%

WHEN YOU NEED TO SEARCH FOR INFORMATION/ANSWERS TO QUESTIONS, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

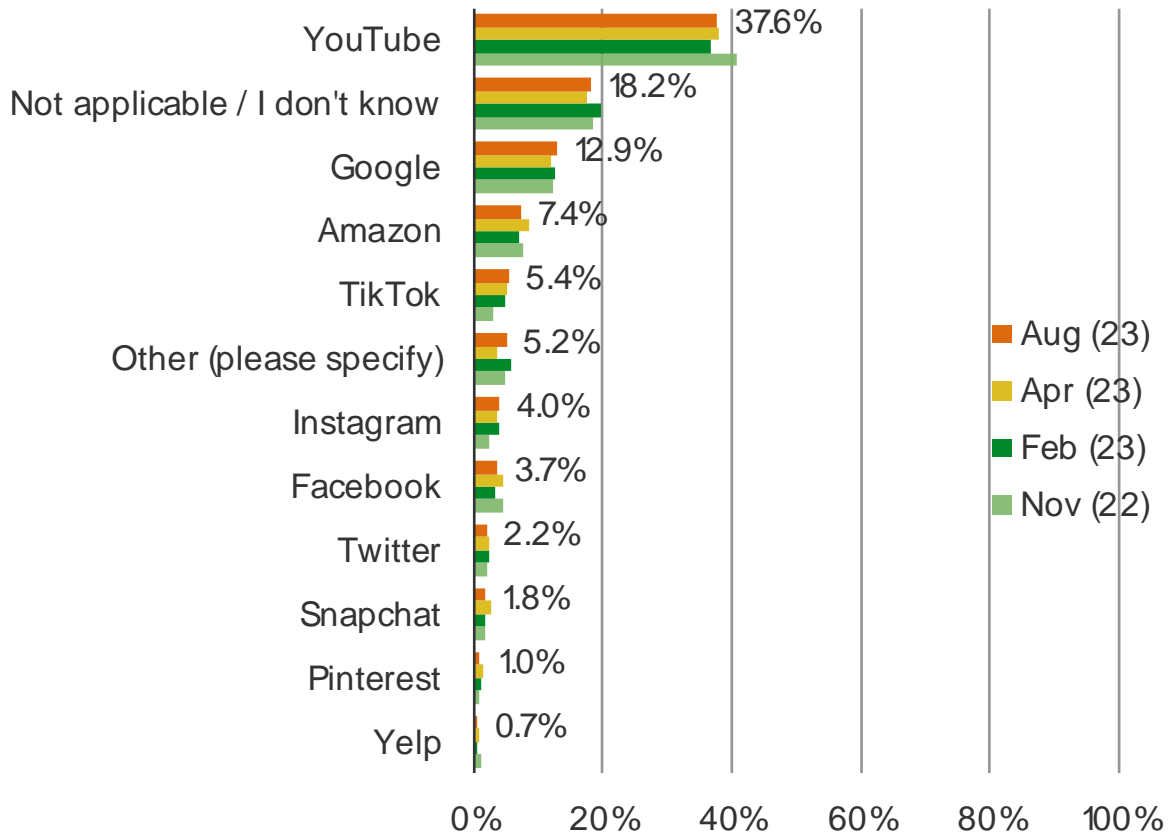


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	8.5%	46.3%	5.5%	4.9%	3.1%	3.7%	10.4%	1.8%	7.9%	1.2%	0.0%
25 to 34	5.7%	47.2%	5.7%	8.5%	6.1%	3.6%	10.9%	1.2%	5.2%	2.8%	0.4%
35 to 44	2.6%	55.2%	5.9%	8.5%	4.4%	1.1%	6.3%	0.4%	8.9%	0.7%	0.7%
45 to 54	1.6%	65.2%	3.5%	7.4%	2.0%	0.4%	5.5%	0.8%	5.1%	2.0%	3.9%
55 to 64	0.0%	77.4%	0.0%	1.7%	0.0%	0.0%	5.4%	0.0%	1.2%	0.4%	5.4%
65 to 74	0.0%	72.8%	0.0%	1.1%	0.0%	0.5%	5.2%	0.0%	3.1%	0.0%	6.3%
75 or older	0.0%	78.1%	0.0%	0.6%	0.0%	0.0%	2.5%	0.0%	1.3%	0.0%	5.0%

WHEN YOU NEED TO SEARCH FOR MUSIC OR AUDIO CONTENT, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

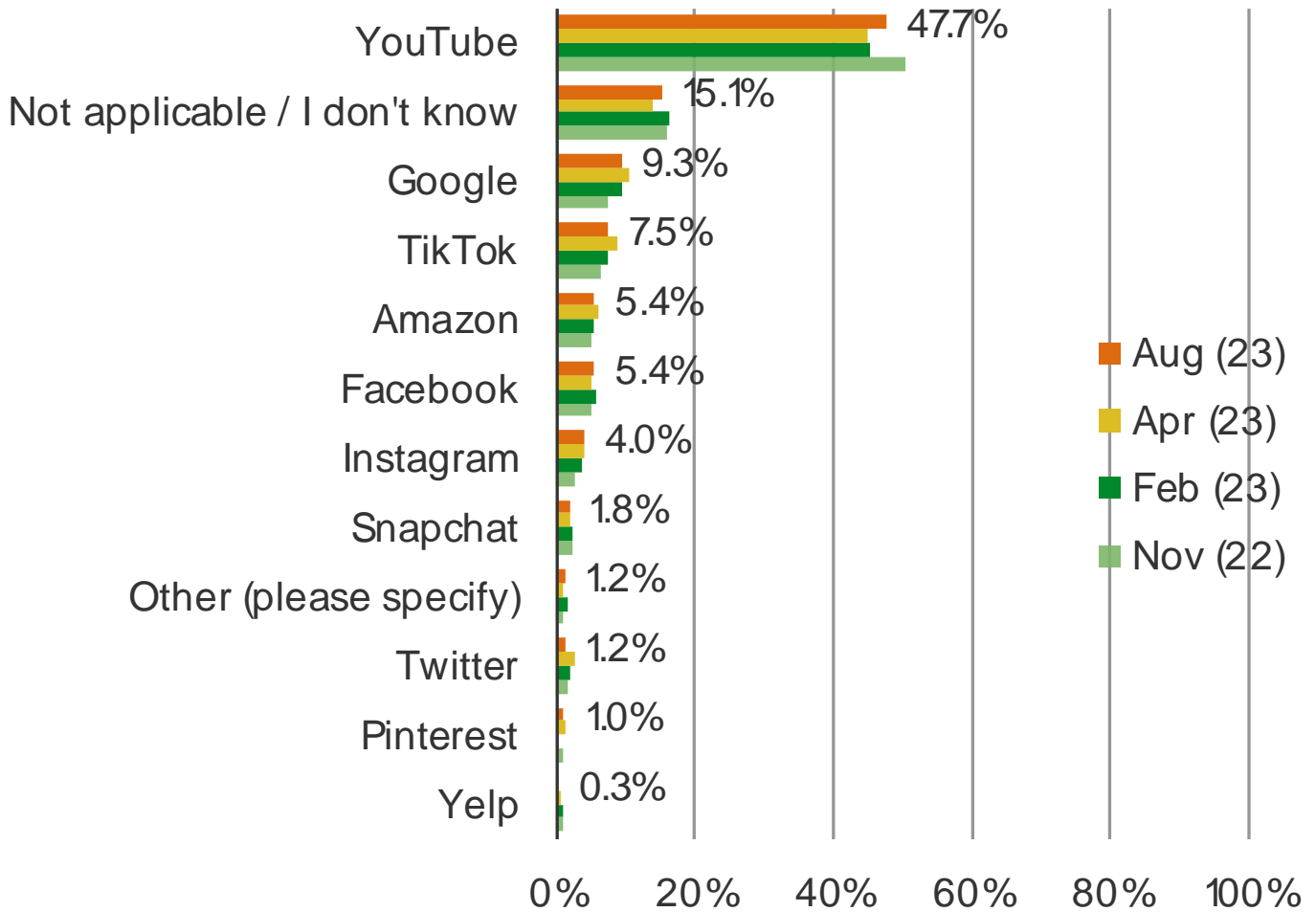


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	18.3%	8.5%	7.3%	1.8%	3.7%	6.7%	35.4%	1.2%	6.1%	0.6%	3.1%
25 to 34	10.5%	7.3%	8.5%	8.9%	5.7%	3.6%	36.3%	0.8%	6.9%	2.0%	4.8%
35 to 44	4.8%	15.6%	6.3%	6.3%	3.7%	1.5%	41.5%	1.1%	6.3%	1.1%	2.2%
45 to 54	4.3%	13.3%	3.5%	3.1%	1.2%	1.2%	49.6%	1.2%	5.5%	1.6%	6.6%
55 to 64	0.8%	14.4%	0.4%	1.7%	0.0%	0.0%	46.1%	0.0%	9.1%	0.0%	6.2%
65 to 74	0.0%	15.2%	0.0%	1.6%	0.0%	0.5%	28.3%	0.0%	12.0%	0.5%	10.0%
75 or older	0.0%	16.3%	0.6%	0.0%	0.0%	0.0%	14.4%	0.0%	6.9%	0.6%	3.1%

WHEN YOU NEED TO SEARCH FOR VIDEO CONTENT, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

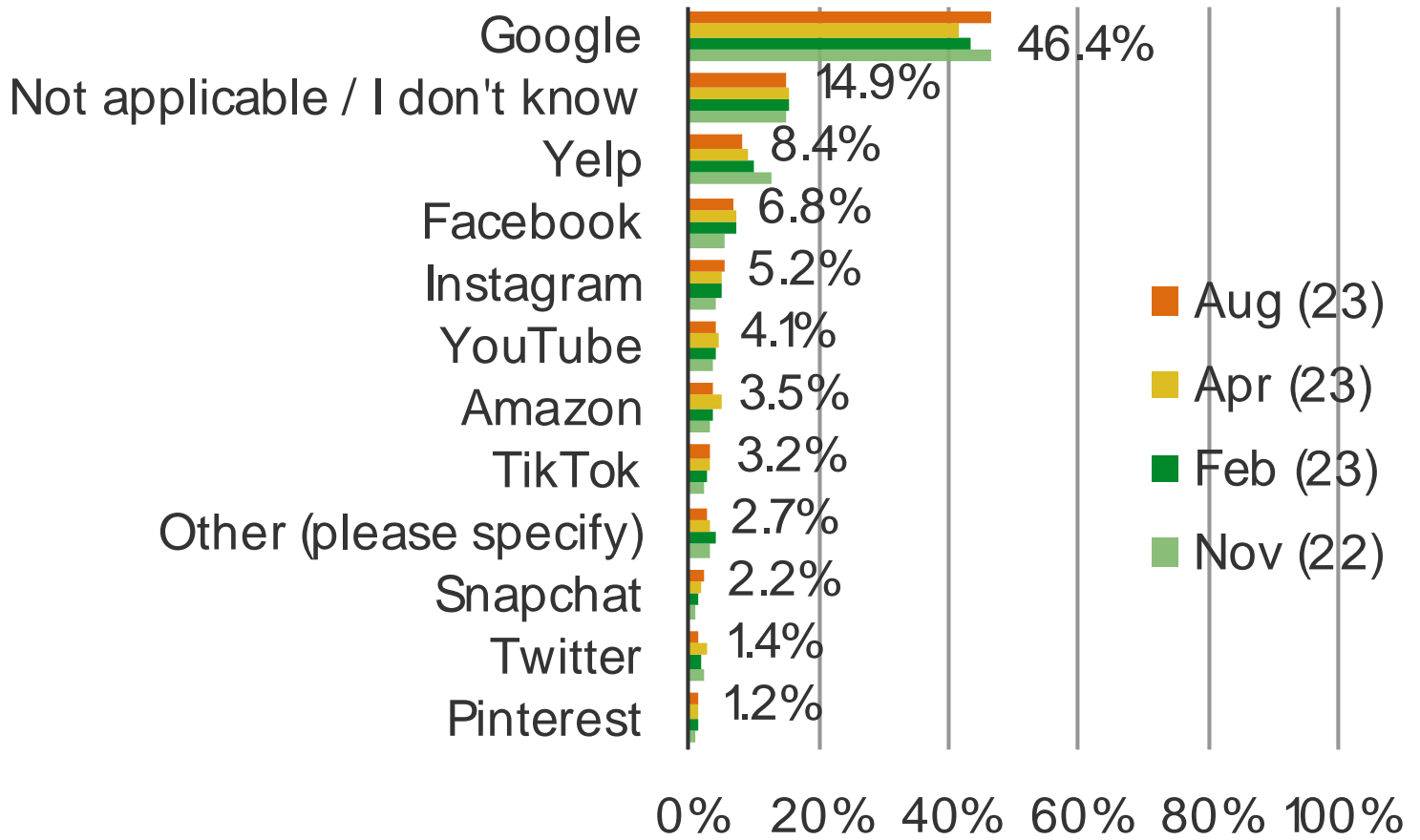


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	19.5%	5.5%	6.1%	6.1%	0.0%	5.5%	43.9%	0.6%	3.1%	2.4%	0.0%
25 to 34	14.1%	4.8%	9.3%	7.3%	3.6%	2.8%	44.4%	0.8%	5.7%	2.8%	0.0%
35 to 44	7.8%	8.9%	6.3%	9.3%	1.1%	4.1%	44.8%	0.4%	7.8%	1.5%	0.4%
45 to 54	7.0%	8.2%	2.7%	7.0%	2.3%	0.4%	61.7%	0.0%	3.5%	0.0%	0.8%
55 to 64	2.9%	11.1%	1.7%	2.5%	0.4%	0.0%	60.1%	0.0%	3.3%	0.0%	2.1%
65 to 74	0.5%	15.2%	0.0%	2.1%	0.0%	0.0%	43.5%	0.0%	8.4%	0.0%	4.7%
75 or older	0.6%	13.1%	0.0%	1.3%	0.0%	0.0%	25.6%	0.0%	6.3%	0.0%	1.3%

WHEN YOU NEED TO SEARCH FOR PLACES TO EAT, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.

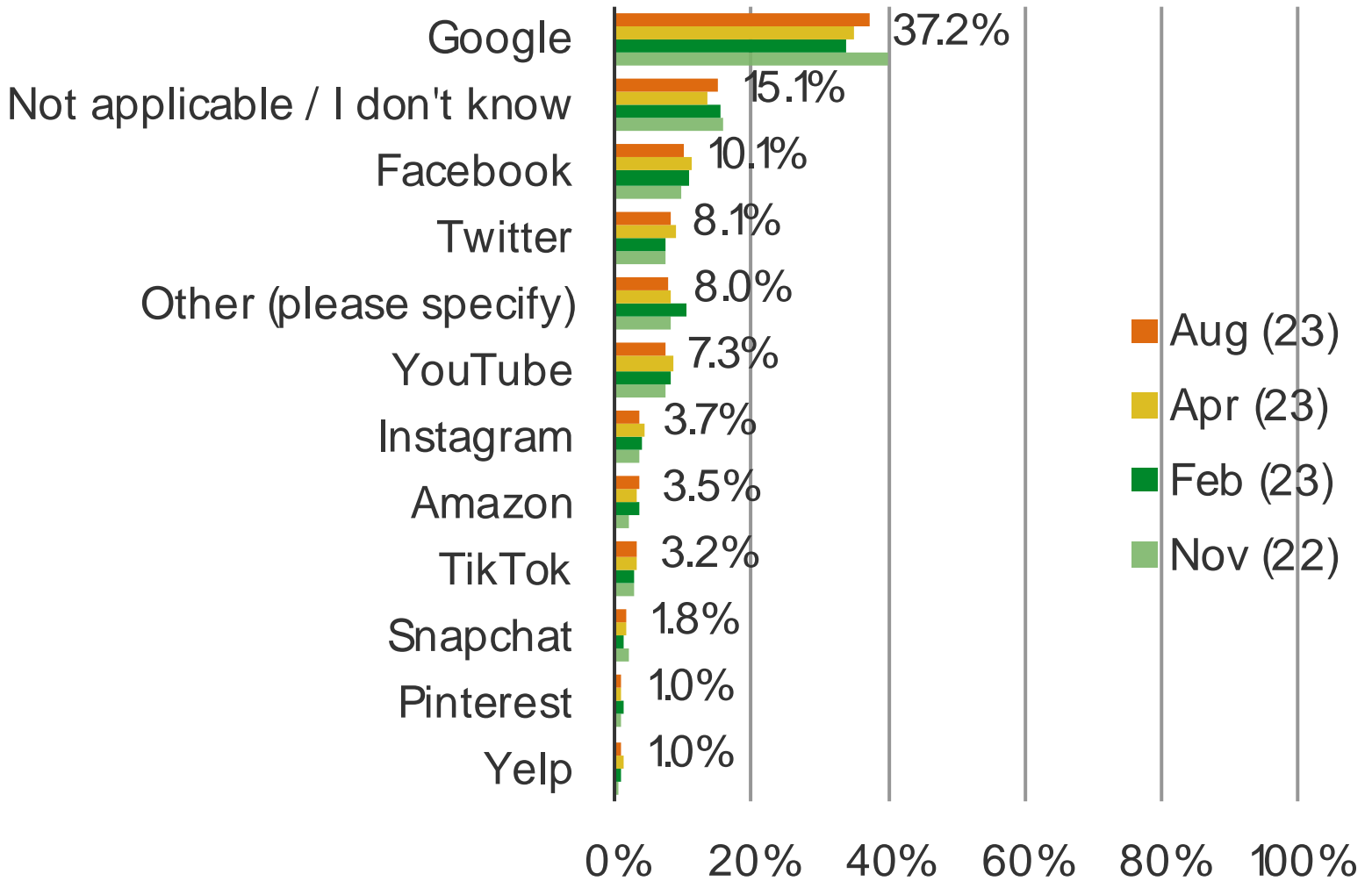


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	10.4%	34.8%	11.0%	5.5%	3.1%	6.1%	7.3%	9.2%	4.9%	0.0%	0.0%
25 to 34	8.1%	37.5%	14.1%	10.9%	2.0%	2.4%	8.5%	4.4%	4.8%	2.0%	0.8%
35 to 44	1.9%	42.6%	6.7%	8.2%	3.0%	4.4%	5.6%	8.9%	7.8%	2.2%	0.7%
45 to 54	2.3%	55.1%	2.7%	9.4%	1.6%	2.0%	4.3%	7.4%	3.5%	2.3%	1.2%
55 to 64	0.0%	54.7%	0.0%	3.7%	0.0%	0.0%	1.2%	####	0.4%	0.0%	5.4%
65 to 74	0.5%	52.4%	0.5%	3.7%	0.0%	0.0%	0.5%	####	1.1%	0.0%	4.7%
75 or older	0.0%	45.0%	0.6%	3.8%	0.0%	0.0%	0.0%	8.1%	0.6%	0.6%	8.1%

WHEN YOU NEED TO SEARCH FOR NEWS, WHERE DO YOU TYPICALLY START YOUR JOURNEY?

Posed to all respondents.



Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest	Other (please specify)
18 to 24	8.5%	28.1%	6.7%	11.0%	14.6%	4.9%	9.2%	1.8%	4.9%	0.6%	0.0%
25 to 34	6.1%	26.6%	8.1%	12.1%	15.7%	4.4%	10.9%	0.0%	7.7%	1.6%	0.4%
35 to 44	4.4%	37.4%	6.7%	10.7%	10.7%	2.6%	5.6%	2.6%	5.9%	2.2%	3.3%
45 to 54	2.3%	42.2%	2.3%	12.5%	7.4%	0.8%	9.0%	2.0%	2.7%	1.6%	5.9%
55 to 64	0.8%	44.9%	0.0%	9.9%	2.5%	0.0%	8.6%	0.0%	0.0%	0.0%	12.4%
65 to 74	0.0%	39.3%	0.0%	7.9%	2.6%	0.0%	3.1%	0.5%	1.6%	0.5%	16.2%
75 or older	0.0%	40.6%	0.6%	3.8%	1.3%	0.0%	3.1%	0.0%	0.0%	0.0%	22.5%