

# Bespoke Survey Research

November 2023

## Search

Volume 5 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: GOOG, MSFT.

### KPIs and Key questions

1. ChatGPT adoption among the broader population continues on a mostly flat trend (the share who has tried it has been slower to increase in recent waves, while awareness has continued to increase).
2. Among those who have ever tried AI Chatbots, respondents think usage has increased and they expect to use it more going forward.
3. ChatGPT NPS among those who have tried it is holding steady at ~36. This is lower than what we recorded earlier in 2023, but we would note that earlier adopters are typically far more enthusiastic in NPS questions (so this action in this KPI isn't atypical).
4. Consumer views on how trustworthy AI powered chatbots are softening slightly sequentially.
5. Google remains top of mind for consumers across a number of dimensions we track including where they start their general search queries/journeys, travel related searches, and music/audio (via YouTube).
6. When it comes to use cases, respondents say they use Google for "everything." In contrast, all other platforms we asked the same questions about had more specific use cases in mind (ie, Twitter = news, Pinterest = recipes, YouTube = music or videos).

### Noteworthy Stats:

**14.6%** Of respondents have tried ChatGPT.

**15.8%** Of respondents have a very positive view of ChatGPT.

**11.5%** Of respondents would be willing to pay a monthly fee to have access to an AI chatbot like ChatGPT.

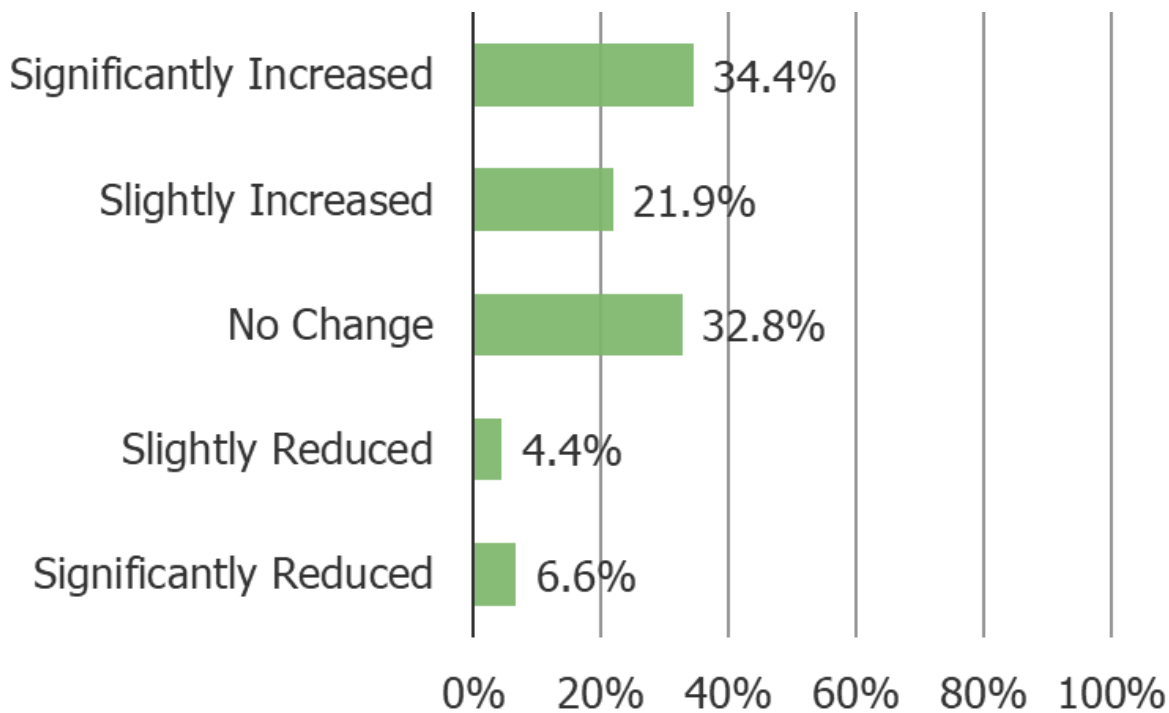
**24.7%** Of respondents think AI powered chatbots are trustworthy.

Search

## NEW QUESTIONS

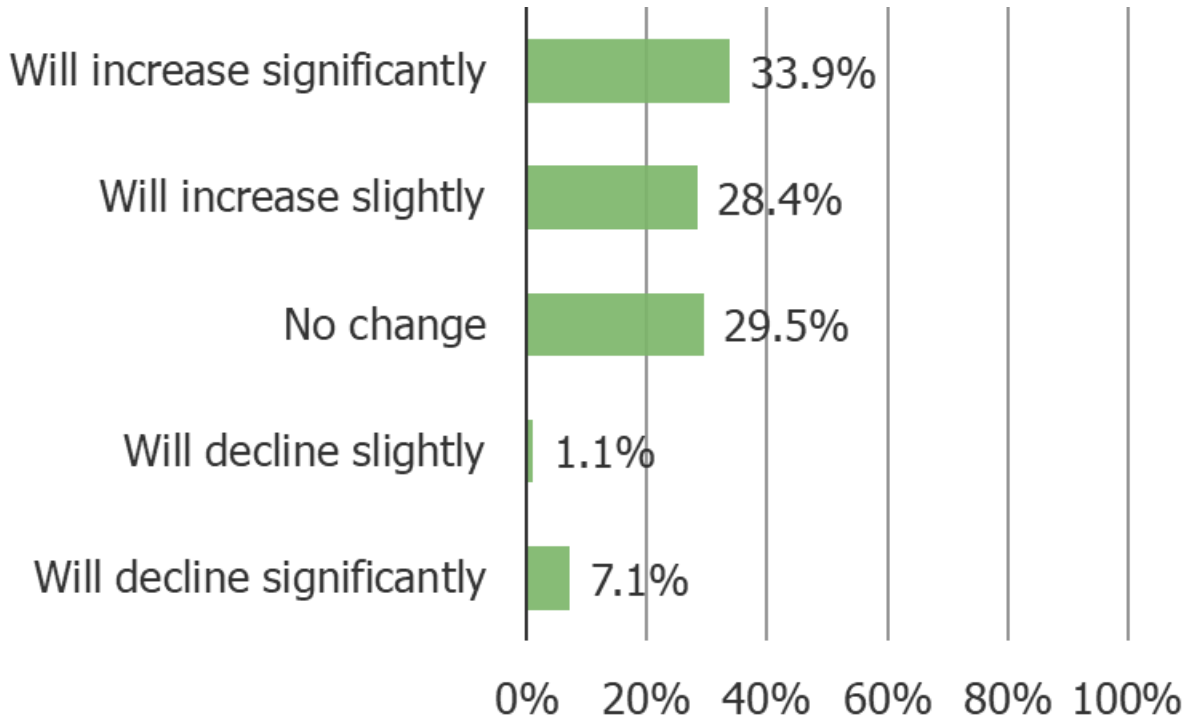
OVER THE PAST MONTH, HAVE YOU CHANGED HOW OFTEN YOU PERSONALLY USE AI CHATBOTS, LIKE CHAT GPT?

Posed to all respondents who have tried ChatGPT. (N=183)



GOING FORWARD, WOULD YOU EXPECT YOUR USAGE OF AI CHATBOTS, LIKE CHAT GPT, TO CHANGE IN ANY WAY?

Posed to all respondents who have tried ChatGPT. (N= 183)

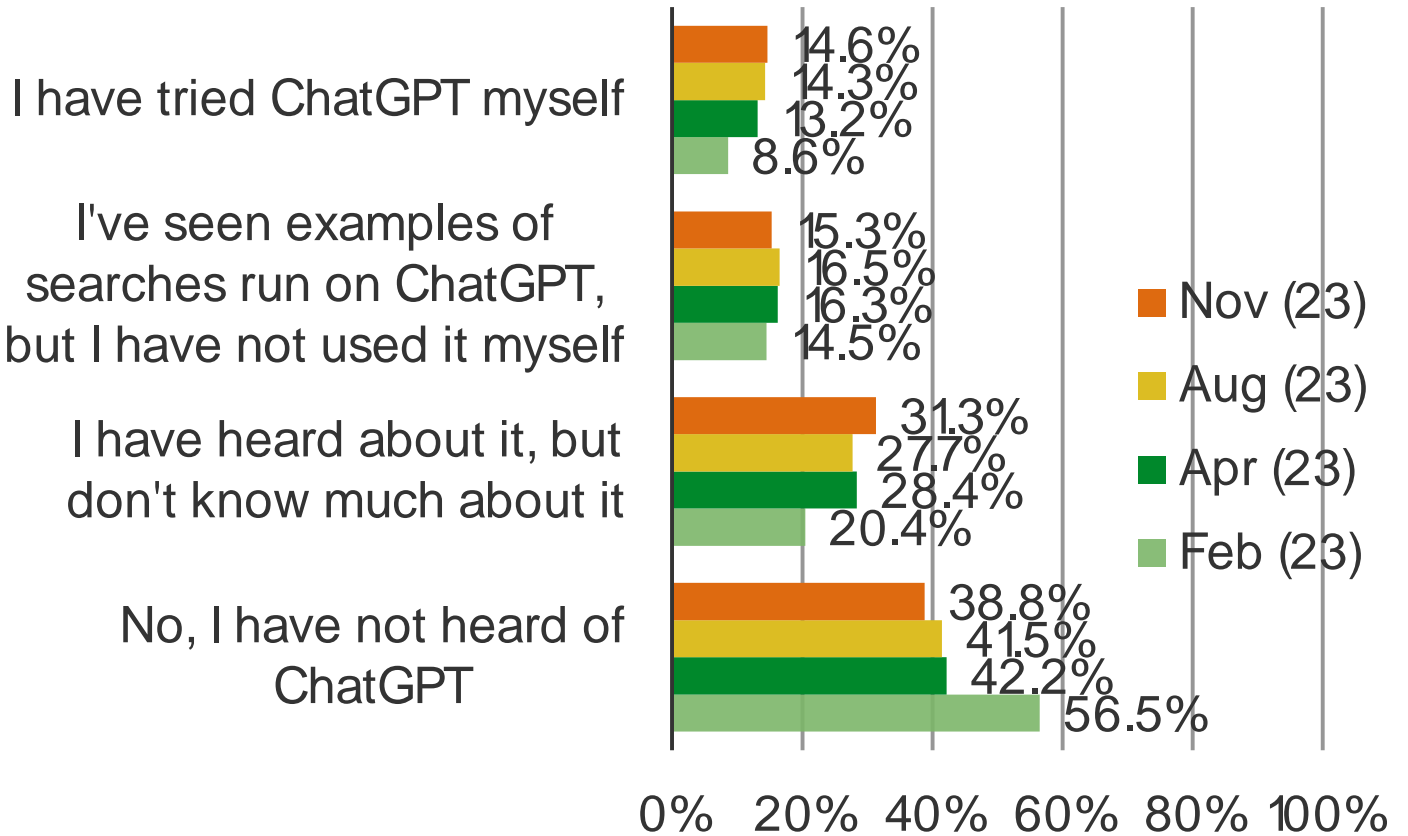


# Search

SEARCH

BEFORE TAKING THIS SURVEY, HAD YOU HEARD OF CHATGPT?

Posed to all respondents.



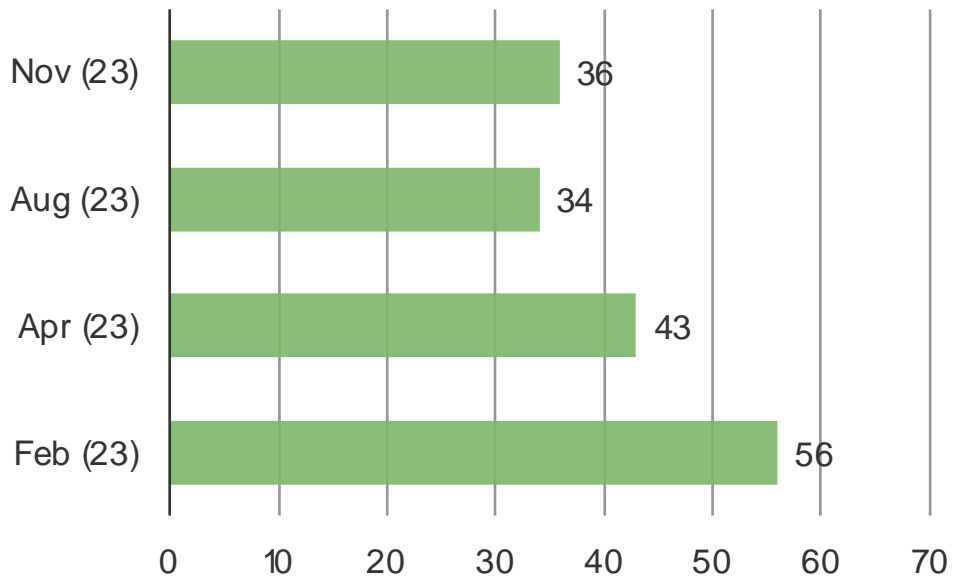
IF YOU HAD TO USE ONE ADJECTIVE TO DESCRIBE CHATGPT, WHAT WOULD IT BE?

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?

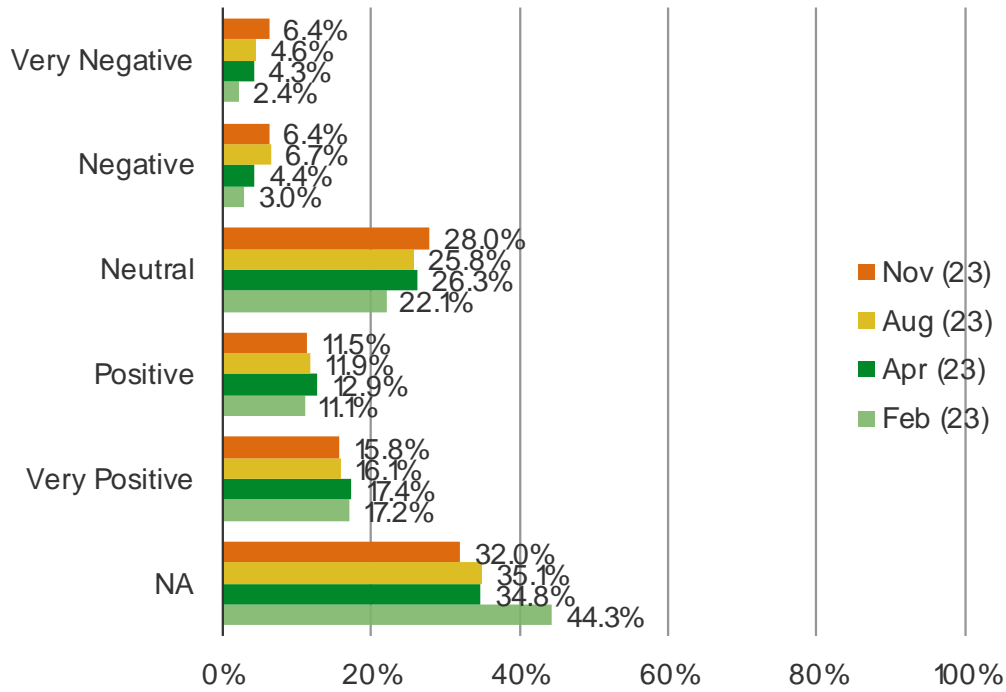
Posed to all respondents who have tried ChatGPT (N = 183)



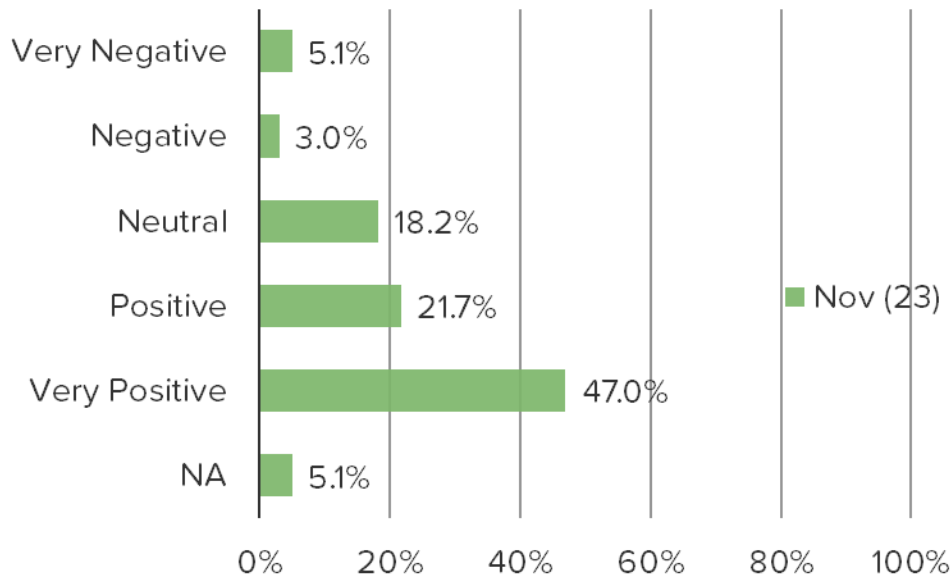


WHAT IS YOUR OPINION OF CHATGPT?

Posed to all respondents.

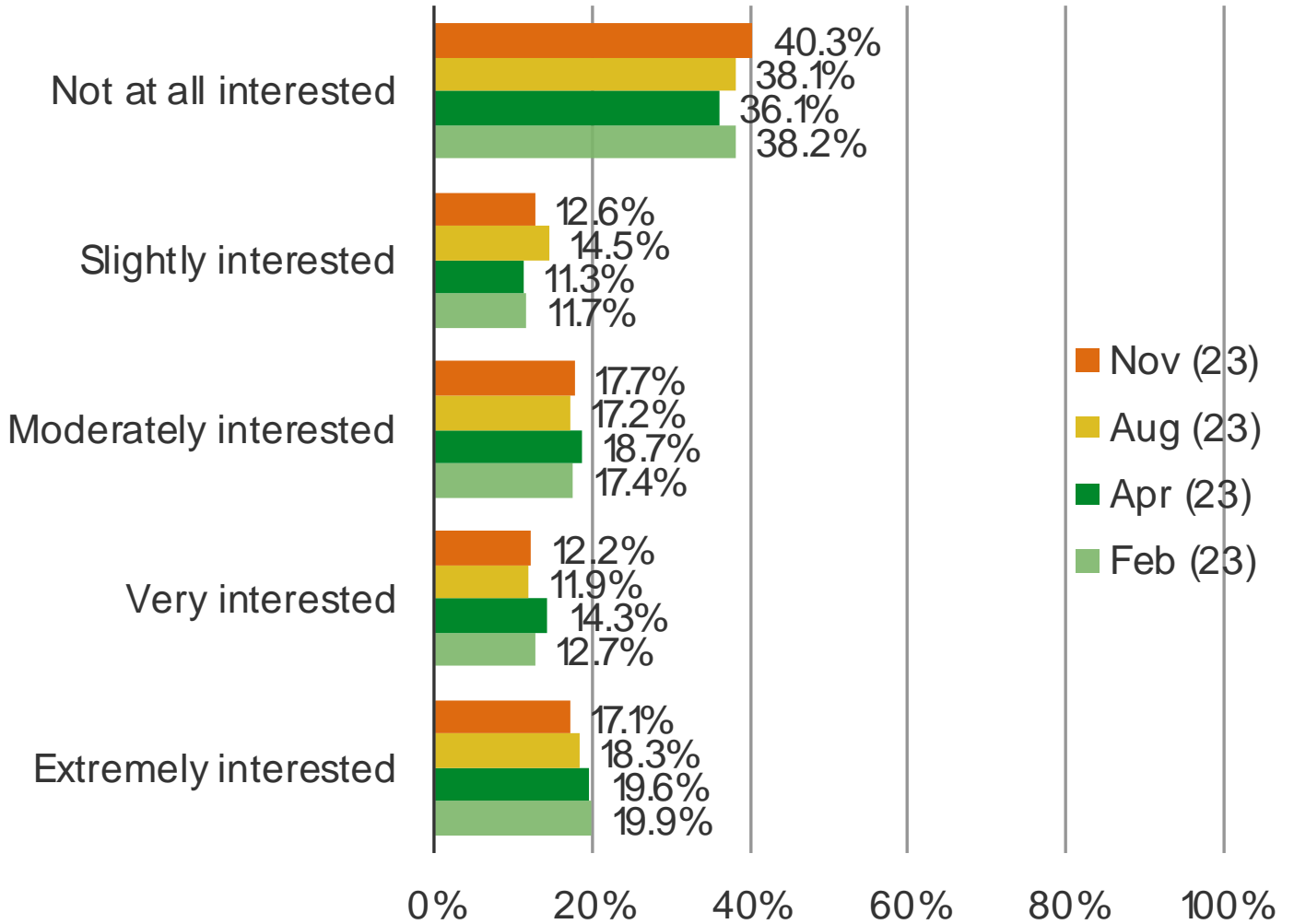


Focusing on respondents who have tried ChatGPT (N = 183)



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...

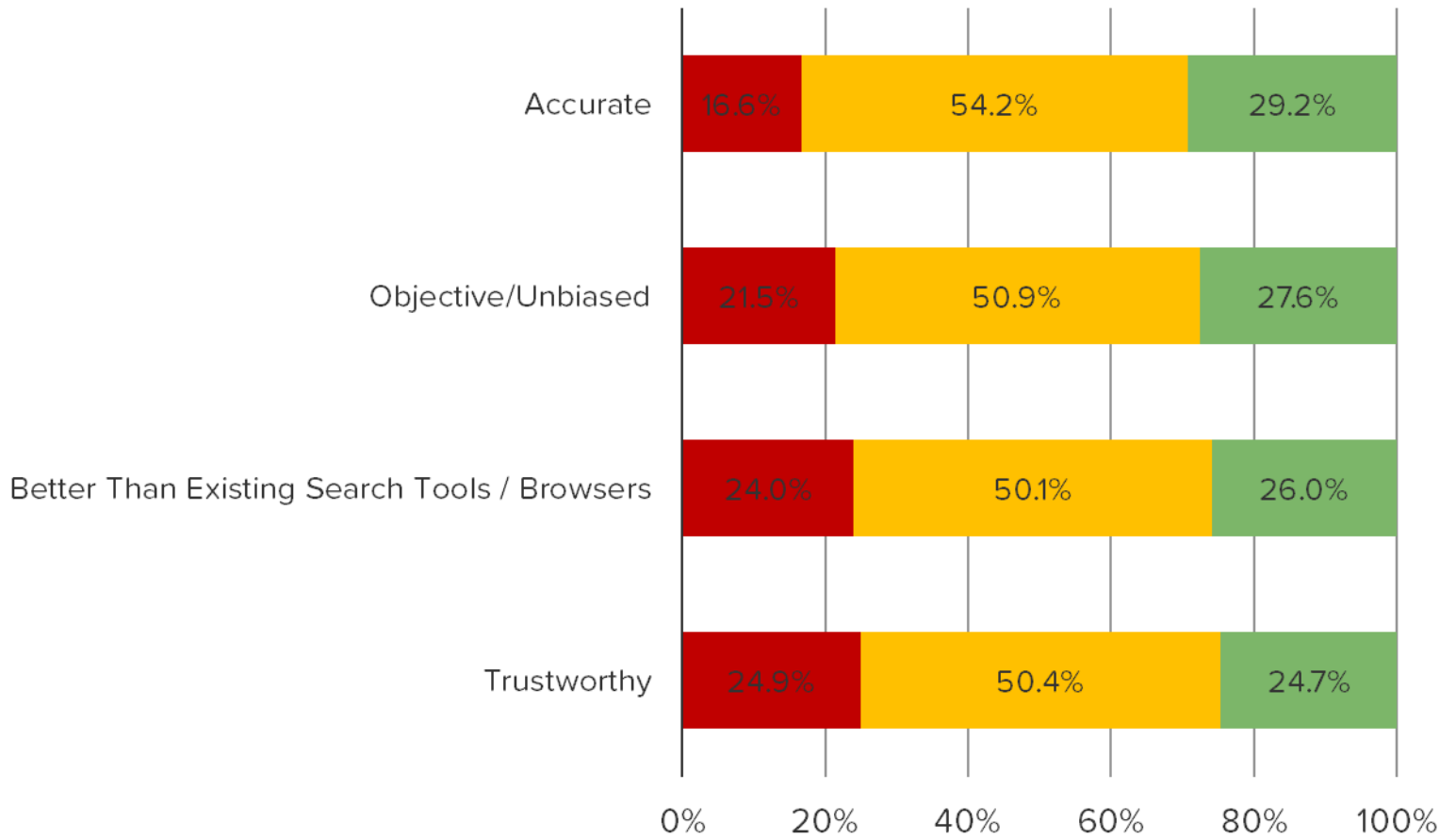
Posed to all respondents.

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No

I don't know

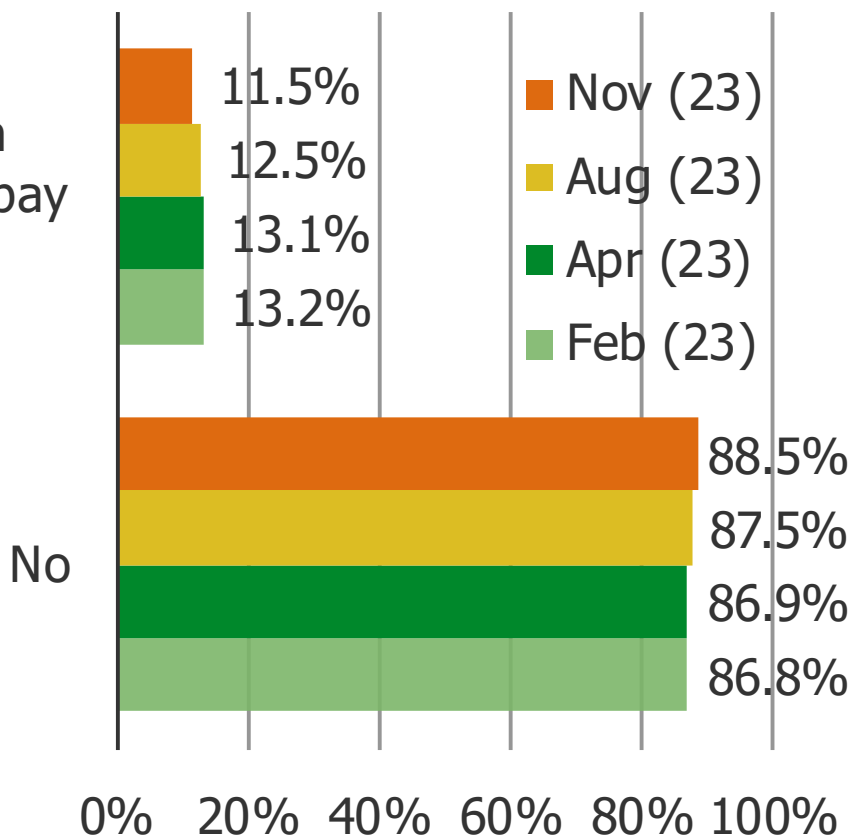
Yes



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

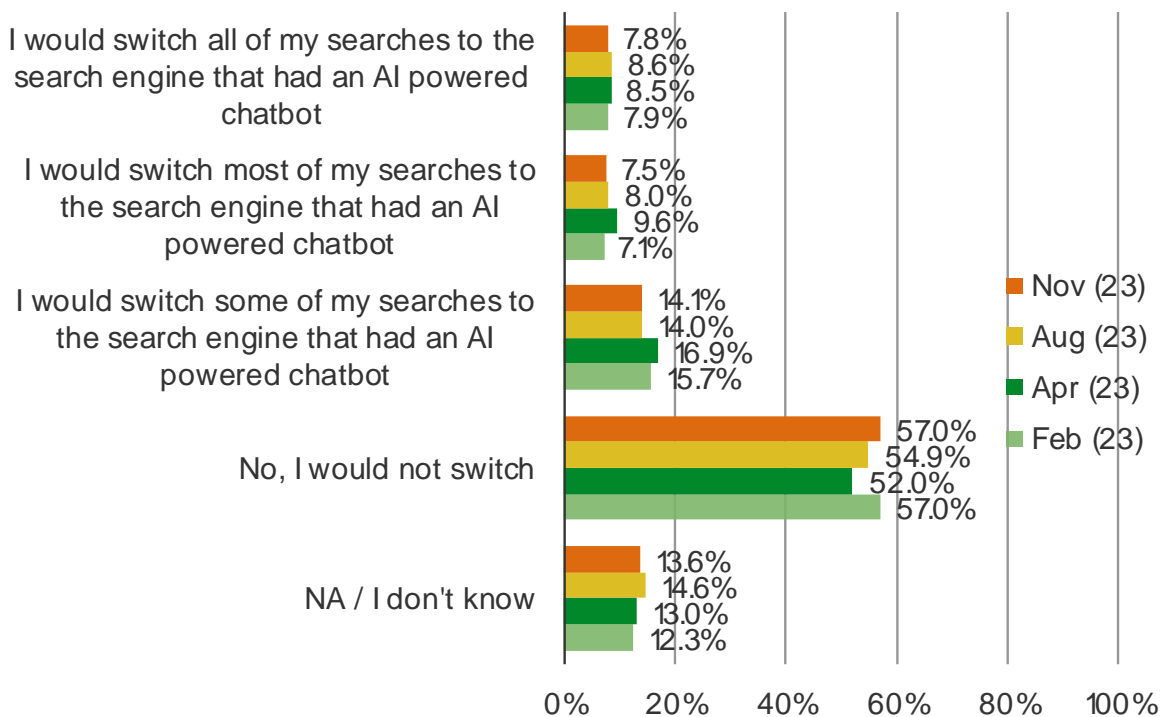
Posed to all respondents.

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

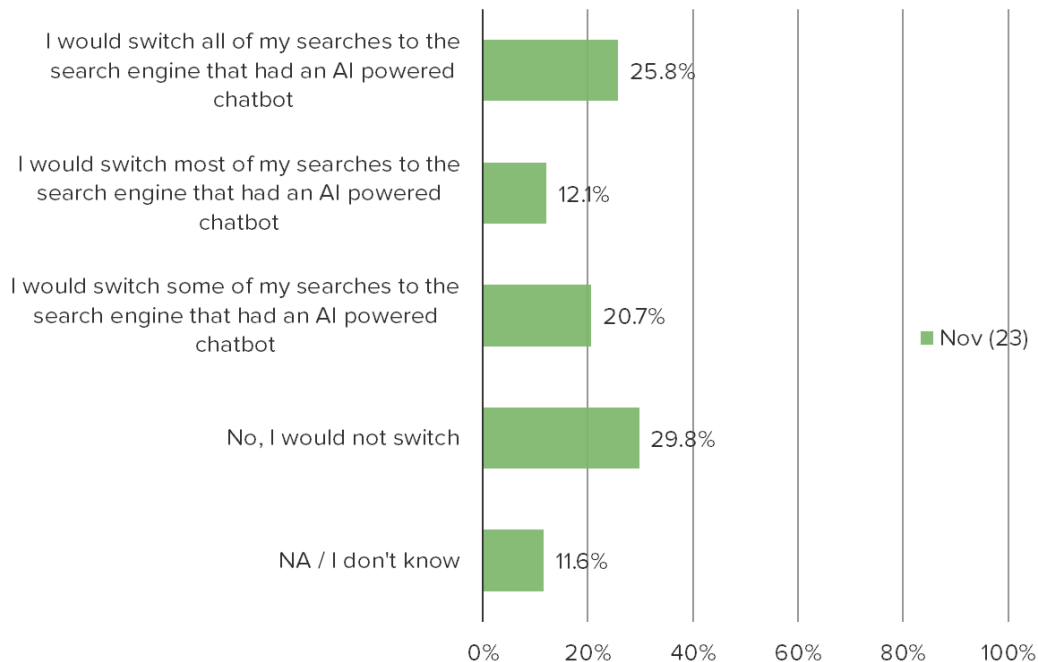


IF THE SEARCH ENGINE THAT YOU CURRENTLY USE MOST OFTEN ONLINE DID NOT HAVE AN AI POWERED CHATBOT LIKE CHATGPT AND ANOTHER SEARCH ENGINE DID, WOULD YOU SWITCH TO THE SEARCH ENGINE THAT HAD THE AI POWERED CHATBOT?

Posed to all respondents.



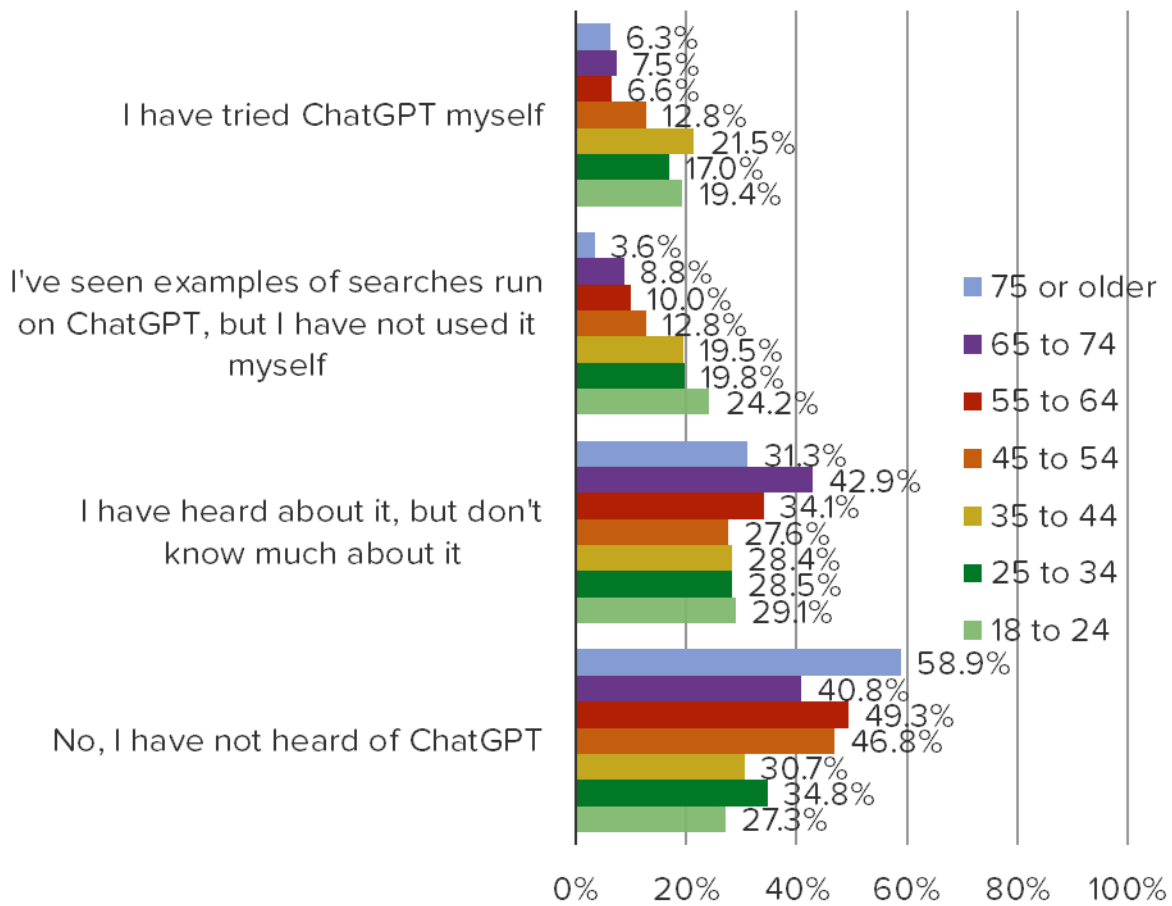
Focusing on respondents who have tried ChatGPT (Nov 23)



COHORT ANALYSIS: CHATGPT ENGAGEMENT

Posed to all respondents.

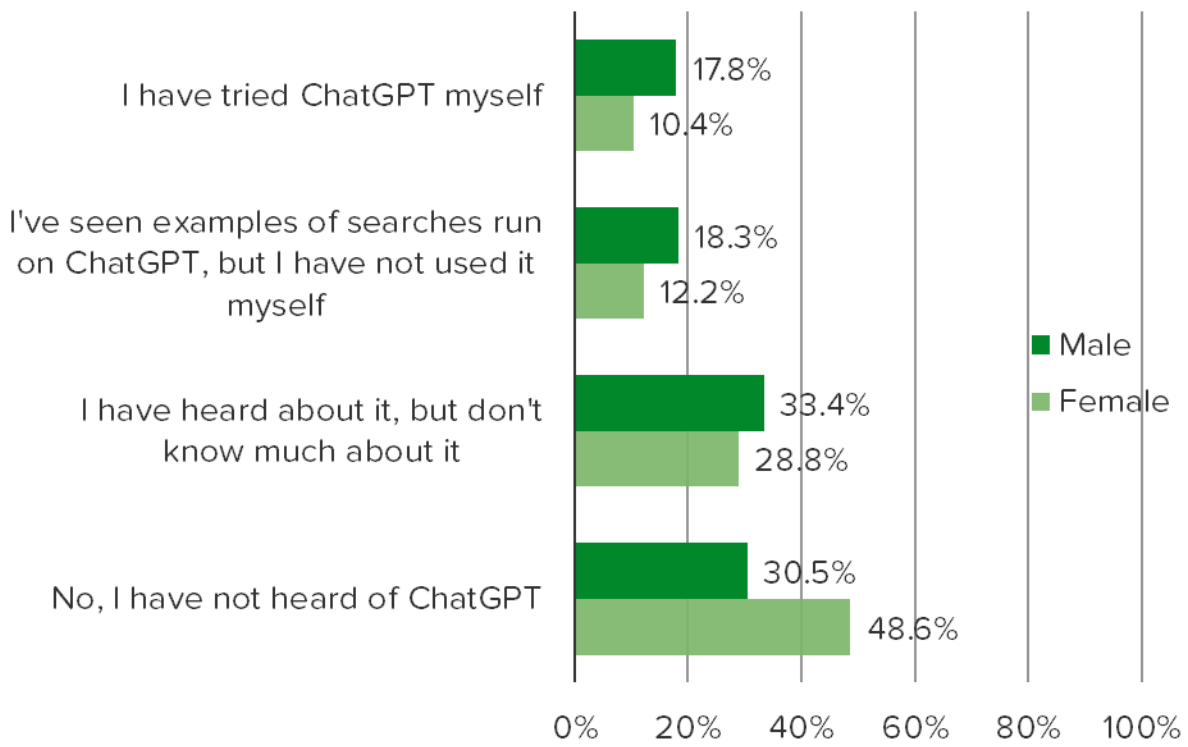
November 2023



COHORT ANALYSIS: CHATGPT ENGAGEMENT

Posed to all respondents.

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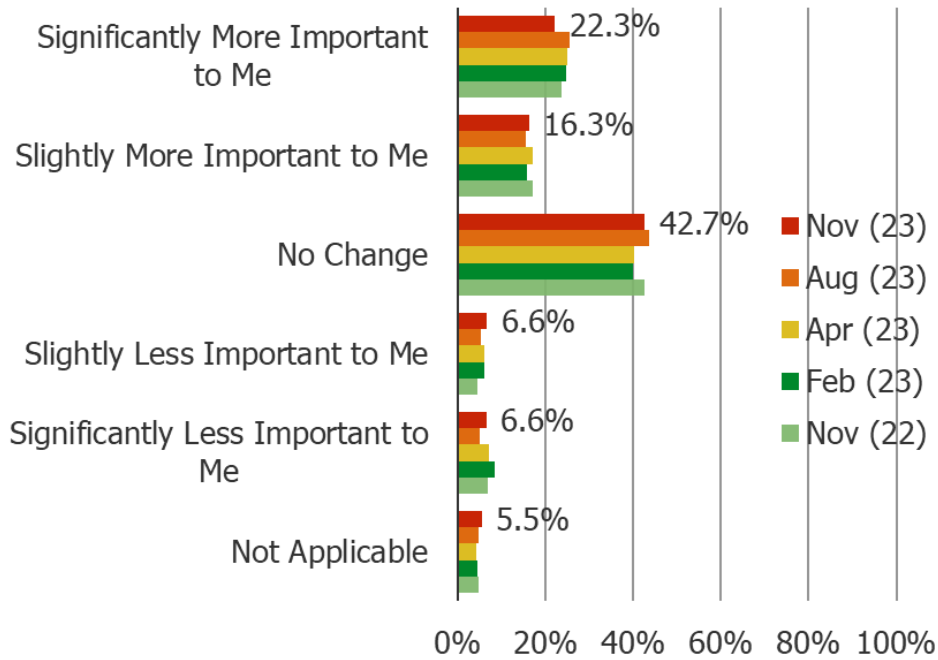
# Search

SEARCH

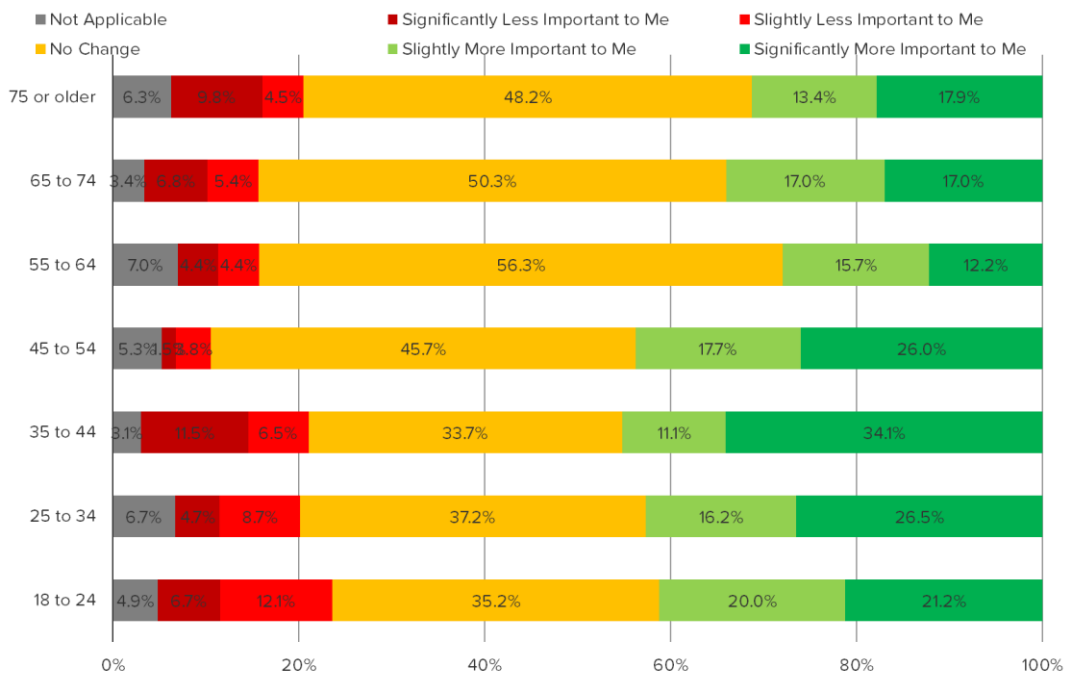


FOR YOU PERSONALLY, IS GOOGLE SEARCH BECOMING....

Posed to all respondents.

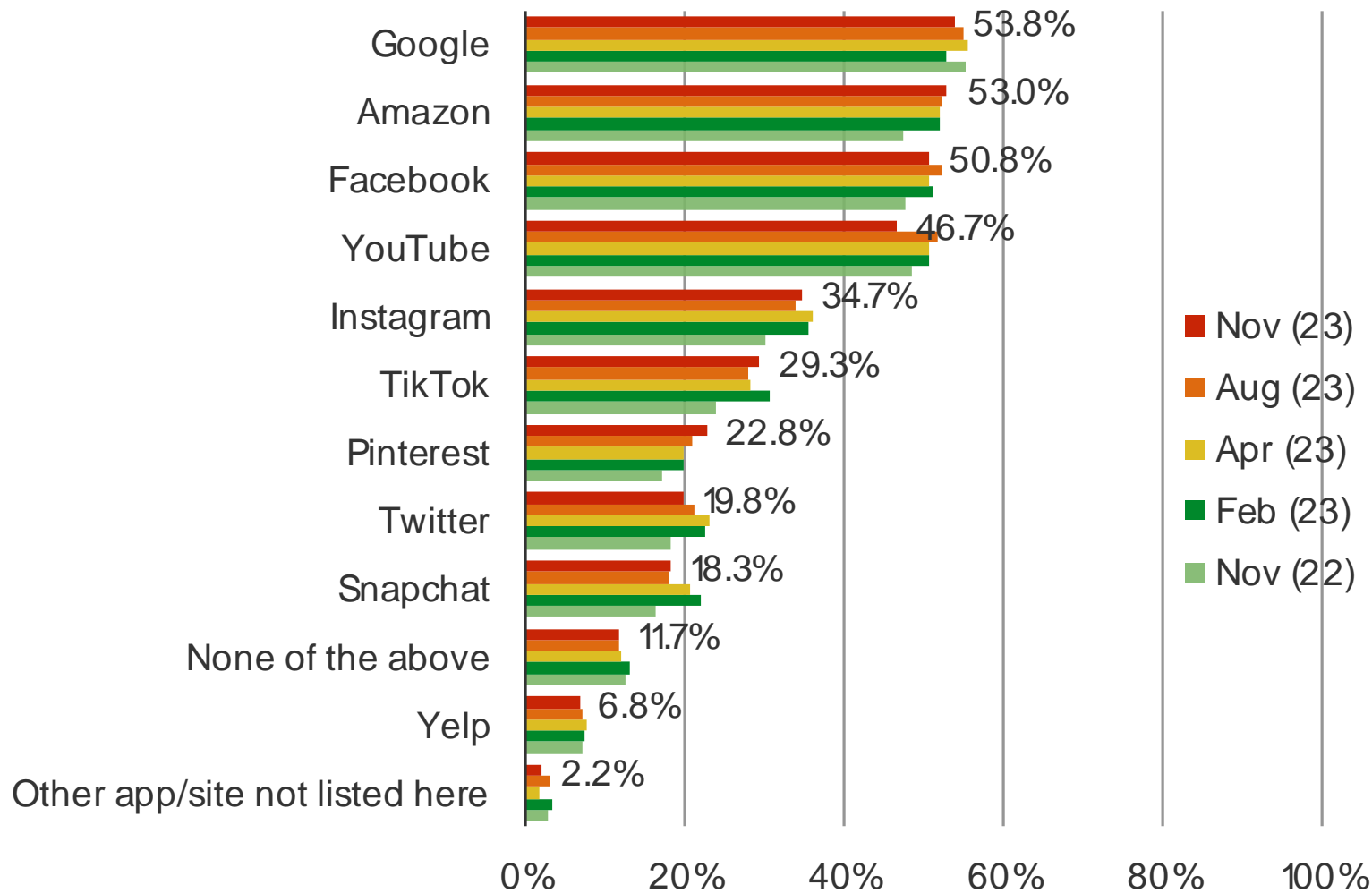


Cross-Tab by Age



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	5.5%	39.4%	49.1%	43.0%	37.0%	21.8%	31.5%	49.1%	7.3%	44.9%	27.3%
25 to 34	6.7%	44.3%	56.5%	51.4%	56.1%	26.1%	30.8%	53.4%	9.1%	58.9%	27.7%
35 to 44	5.0%	49.4%	60.2%	51.0%	64.8%	36.4%	34.9%	55.9%	10.3%	58.6%	29.1%
45 to 54	10.6%	27.2%	58.1%	34.3%	58.1%	17.0%	12.1%	53.6%	4.5%	56.2%	21.5%
55 to 64	12.7%	12.7%	58.1%	17.0%	50.7%	8.7%	4.8%	42.4%	4.4%	53.7%	16.6%
65 to 74	21.8%	7.5%	48.3%	20.4%	42.9%	9.5%	2.0%	36.7%	7.5%	54.4%	16.3%
75 or older	32.1%	2.7%	45.5%	4.5%	31.3%	2.7%	2.7%	22.3%	5.4%	42.9%	13.4%

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

Posed to all respondents who use the below.

TIK TOK



GOOGLE



INSTAGRAM



FACEBOOK



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

Posed to all respondents who use the below.

TWITTER

NEWS



SNAPCHAT



YOUTUBE



YELP



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

Posed to all respondents who use the below.

AMAZON

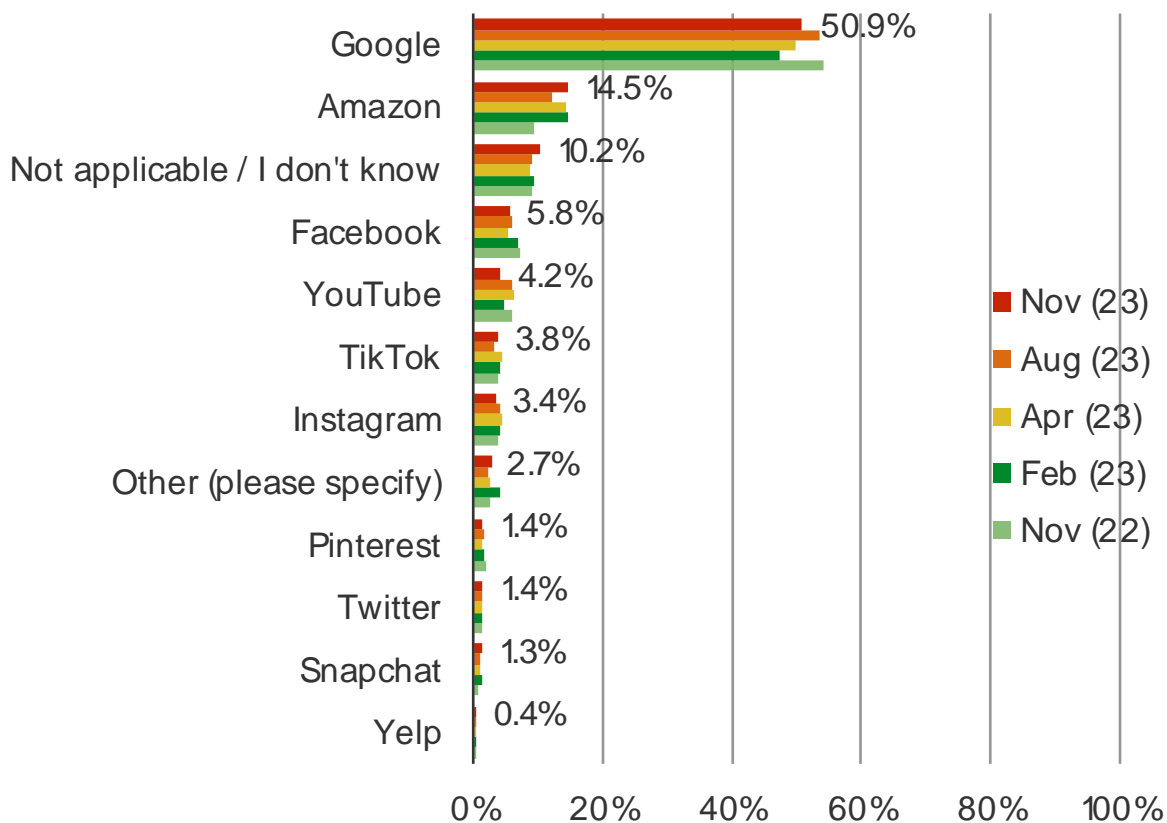


PINTEREST



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

Posed to all respondents.

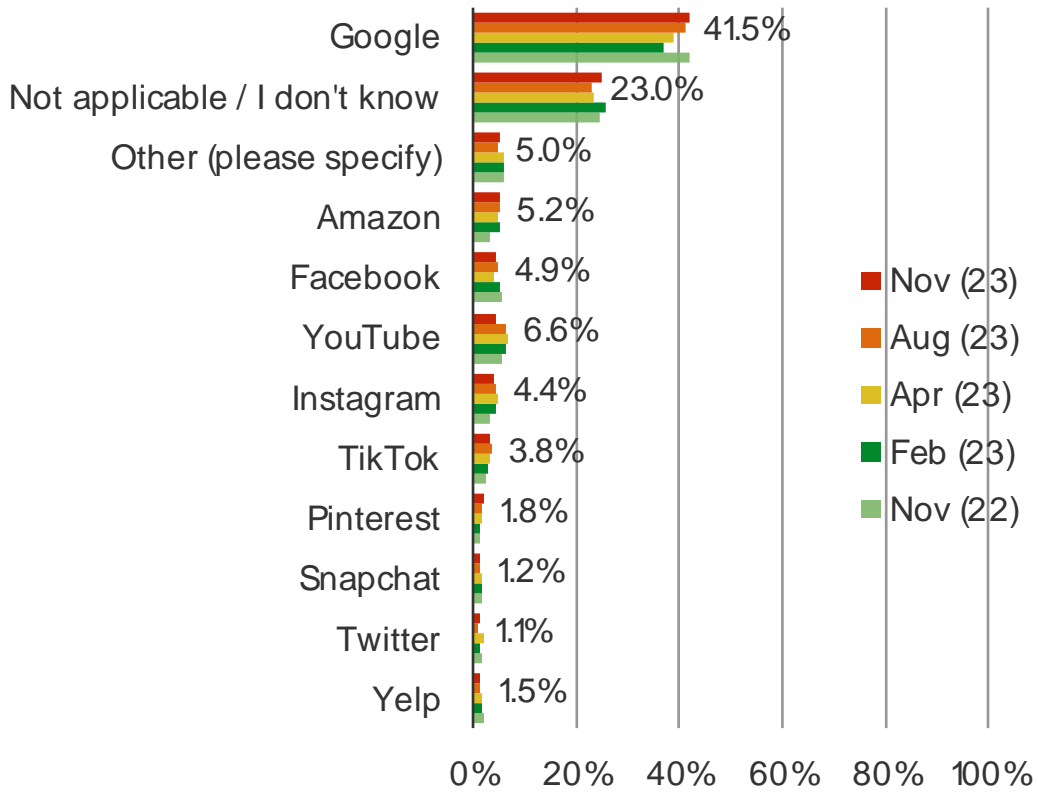


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	6.7%	44.2%	7.9%	4.2%	1.8%	4.2%	6.7%	1.2%	11.5%	1.8%
25 to 34	6.7%	46.6%	5.5%	4.7%	0.4%	1.6%	4.7%	0.0%	16.2%	3.2%
35 to 44	6.5%	43.7%	7.7%	9.6%	3.8%	1.2%	5.4%	0.8%	13.4%	2.7%
45 to 54	1.5%	59.6%	0.4%	5.7%	1.9%	0.8%	4.5%	0.0%	13.2%	0.8%
55 to 64	0.4%	63.8%	0.4%	4.4%	0.0%	0.0%	2.6%	0.4%	12.7%	0.0%
65 to 74	0.0%	57.8%	0.7%	4.1%	0.0%	0.0%	0.7%	0.0%	16.3%	0.7%
75 or older	0.0%	50.0%	0.0%	2.7%	0.0%	0.0%	0.9%	0.0%	18.8%	0.0%

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

Posed to all respondents.

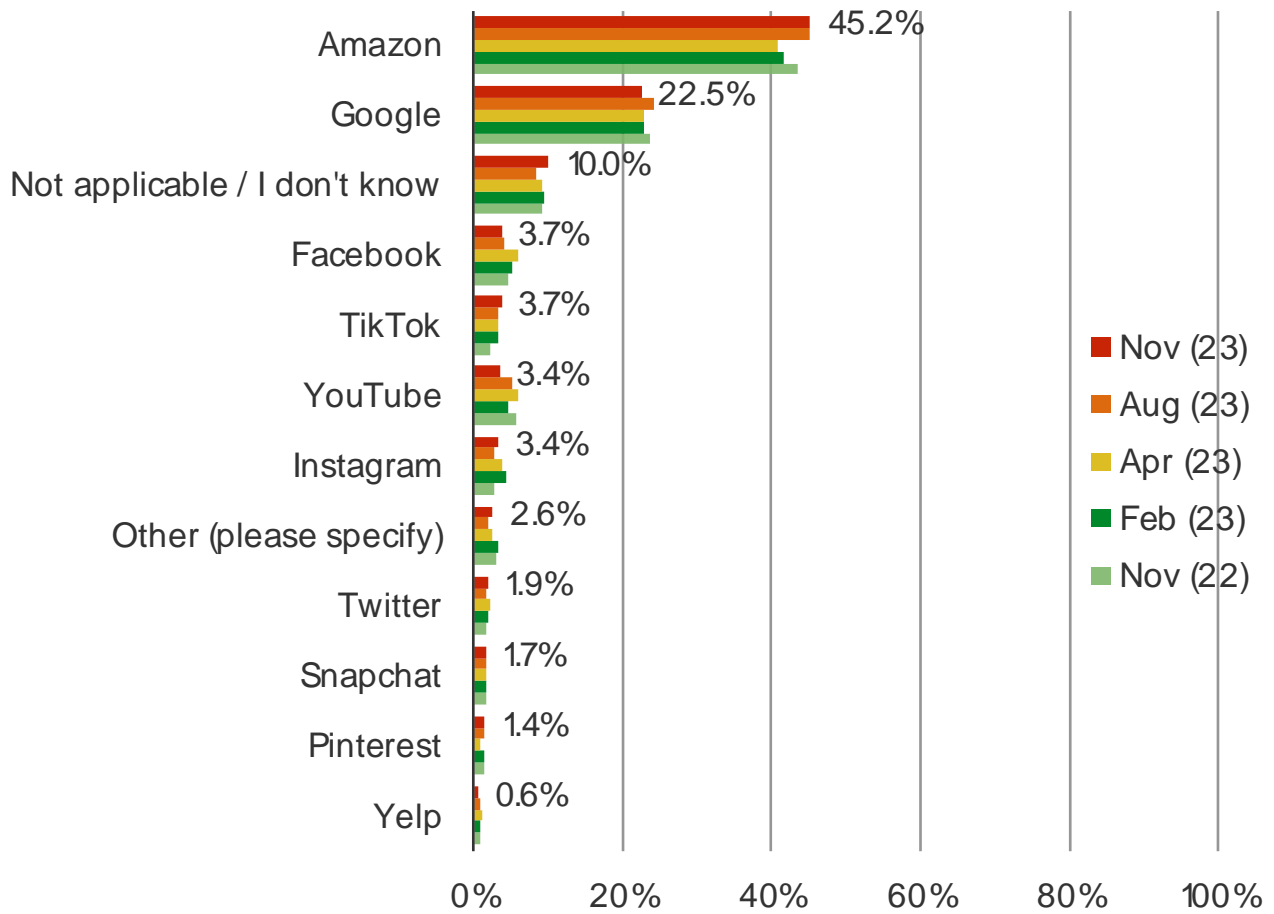


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	7.3%	39.4%	7.3%	7.3%	3.6%	1.8%	7.9%	1.2%	3.0%	4.9%
25 to 34	7.1%	42.7%	9.5%	5.9%	1.6%	0.8%	5.5%	1.6%	9.1%	3.6%
35 to 44	4.6%	37.9%	6.9%	7.3%	2.3%	4.6%	5.0%	3.1%	12.6%	2.7%
45 to 54	1.1%	51.3%	1.1%	3.4%	0.4%	0.8%	4.2%	0.4%	2.3%	0.8%
55 to 64	0.4%	52.8%	0.4%	2.2%	0.0%	0.0%	2.6%	0.4%	0.4%	0.0%
65 to 74	0.0%	40.8%	0.0%	1.4%	0.0%	0.0%	2.7%	0.0%	2.0%	0.0%
75 or older	0.0%	25.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.9%	1.8%	0.9%

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

Posed to all respondents.



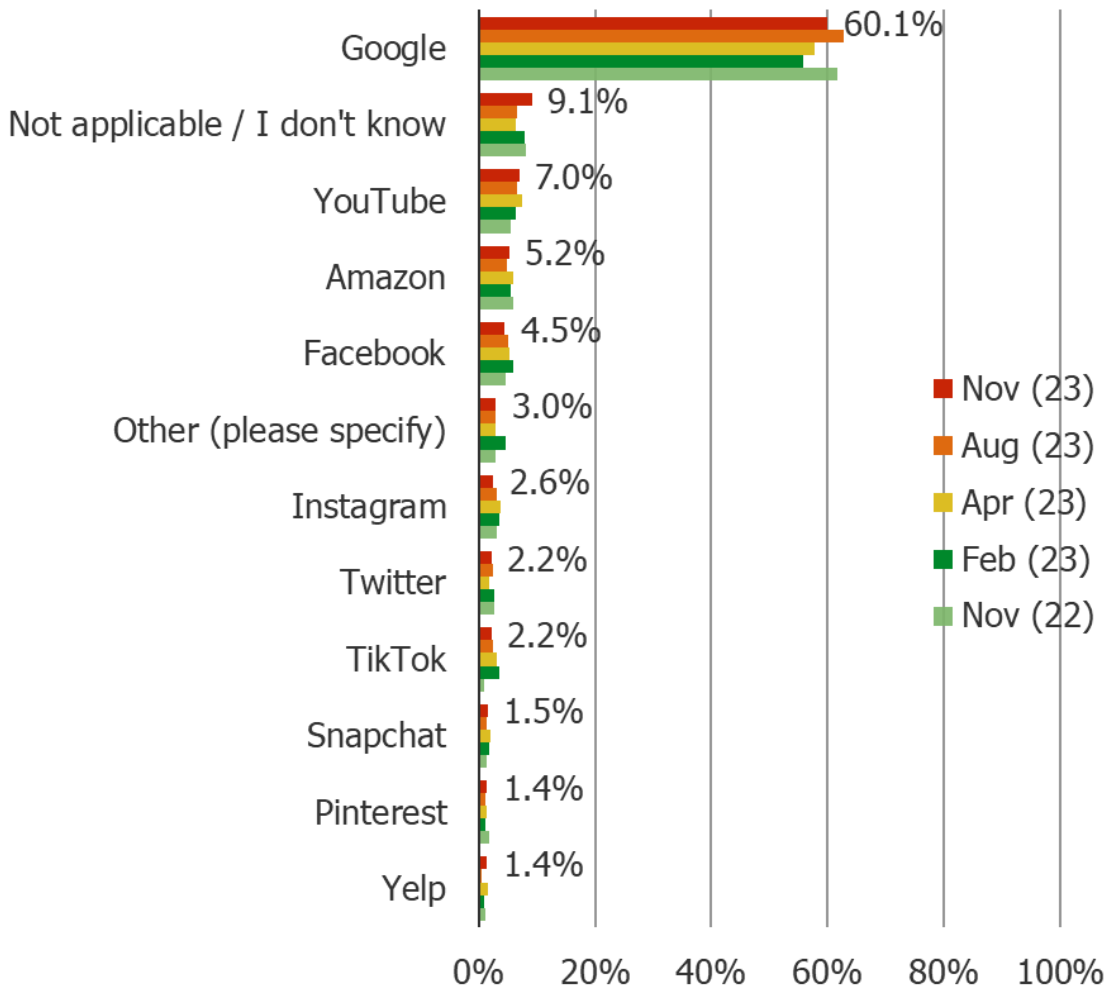
Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	7.3%	18.8%	4.9%	4.2%	4.9%	3.6%	4.2%	1.2%	37.6%	3.6%
25 to 34	6.7%	18.2%	4.7%	3.2%	2.4%	1.6%	5.1%	0.4%	46.3%	1.2%
35 to 44	5.8%	18.4%	7.3%	7.3%	3.8%	3.8%	6.5%	0.4%	36.8%	3.1%
45 to 54	1.9%	26.4%	2.3%	3.0%	1.1%	0.8%	2.6%	0.8%	47.6%	0.4%
55 to 64	0.4%	32.3%	0.4%	1.8%	0.0%	0.0%	1.8%	0.4%	48.0%	0.4%
65 to 74	0.0%	24.5%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	60.5%	0.7%
75 or older	0.0%	27.7%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	46.4%	0.0%



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

Posed to all respondents.

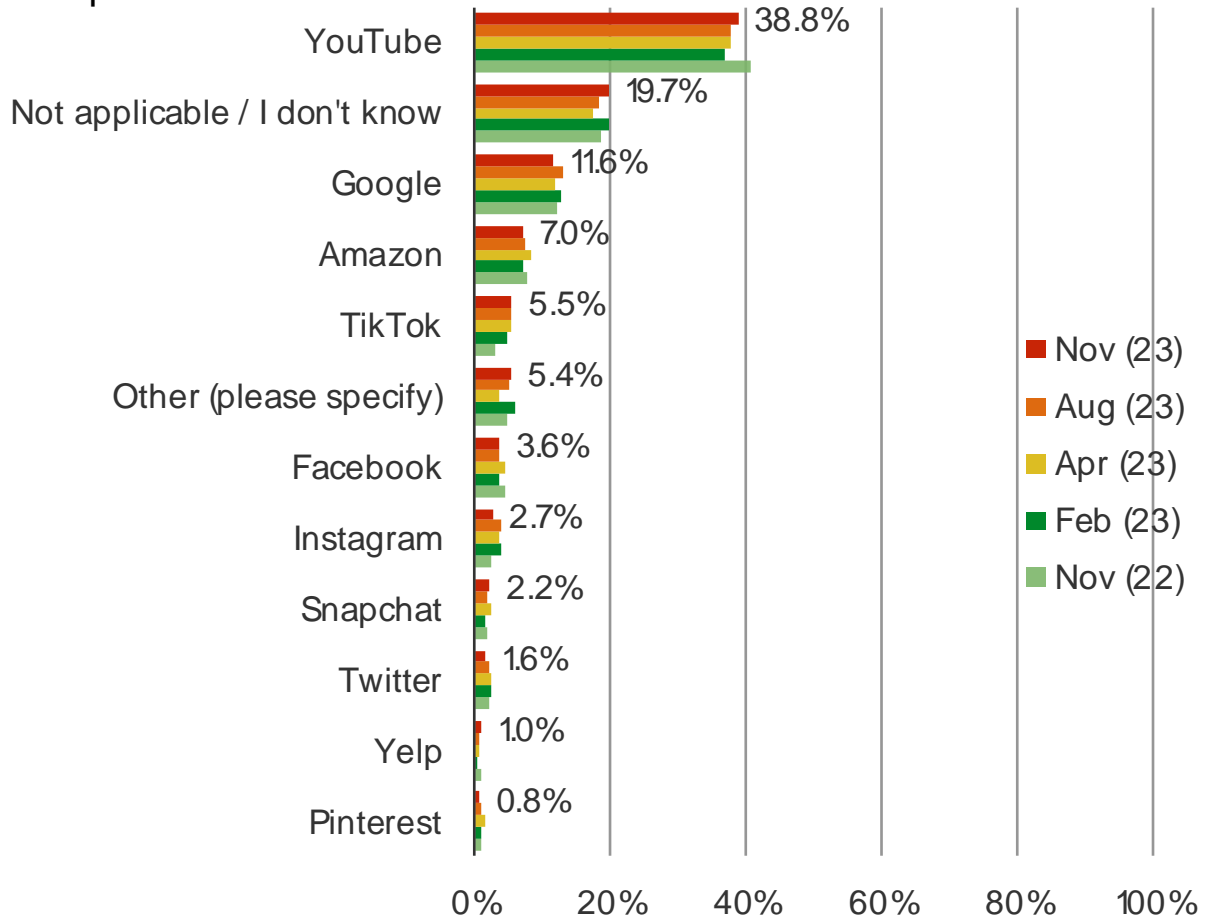


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	5.5%	51.5%	4.9%	4.2%	6.1%	2.4%	7.9%	1.2%	4.2%	1.8%
25 to 34	2.4%	52.2%	3.6%	7.5%	1.2%	3.2%	7.9%	2.0%	9.5%	1.6%
35 to 44	5.4%	46.7%	6.5%	5.8%	5.4%	2.7%	5.8%	2.7%	8.8%	3.1%
45 to 54	1.1%	69.4%	1.1%	3.4%	0.8%	0.4%	7.9%	0.4%	3.0%	1.1%
55 to 64	0.0%	75.6%	0.0%	3.1%	0.0%	0.0%	6.6%	0.4%	1.8%	0.4%
65 to 74	0.0%	73.5%	0.0%	0.0%	0.0%	0.0%	5.4%	0.7%	4.1%	0.7%
75 or older	0.0%	71.4%	0.0%	2.7%	0.0%	0.0%	1.8%	0.9%	1.8%	0.0%

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

Posed to all respondents.

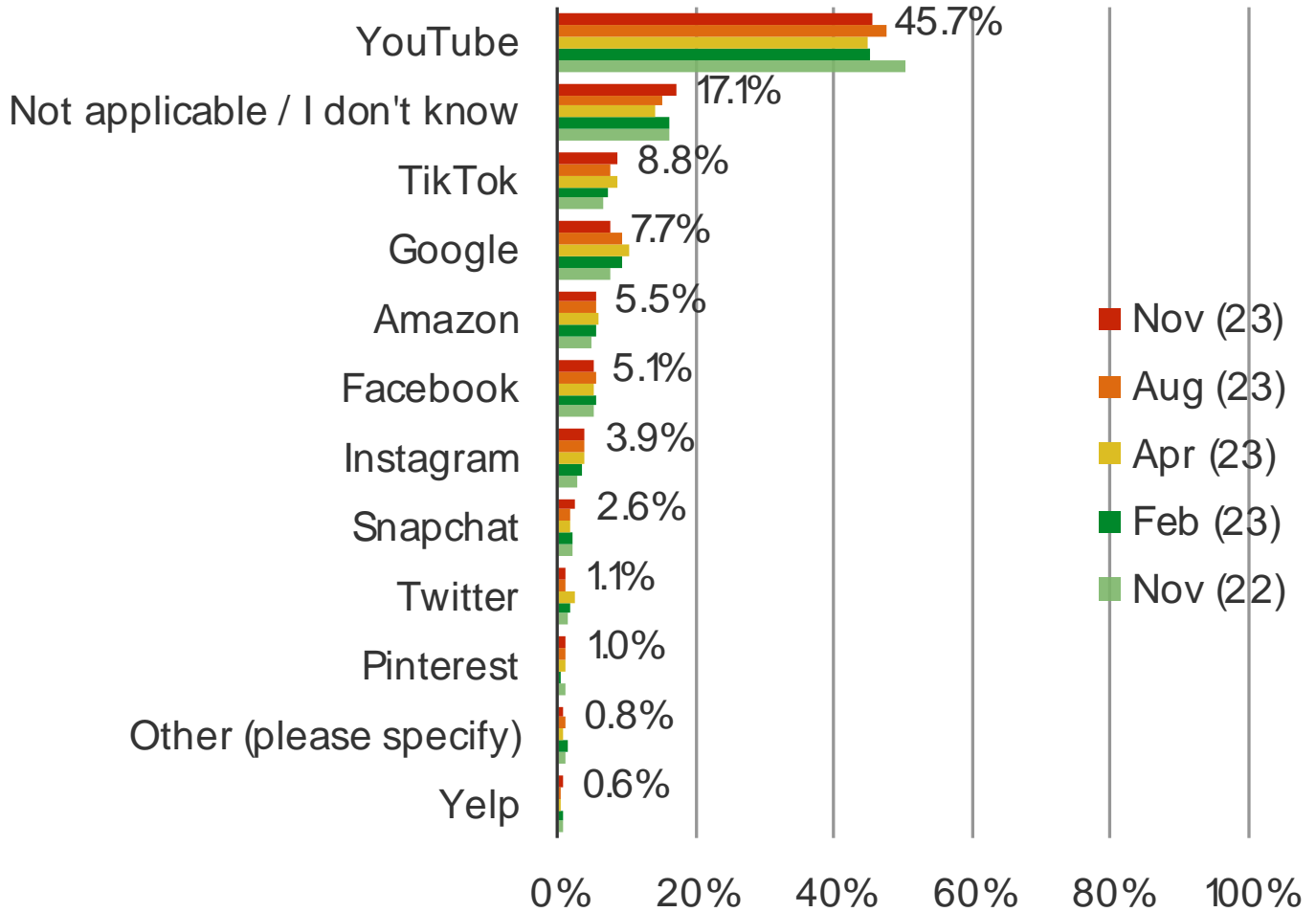


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	13.9%	6.7%	5.5%	3.6%	2.4%	4.2%	39.4%	1.8%	4.2%	1.8%
25 to 34	7.5%	8.3%	3.6%	5.5%	3.6%	4.0%	45.5%	1.6%	7.1%	0.4%
35 to 44	11.1%	11.9%	6.1%	6.9%	3.5%	3.5%	33.3%	1.2%	6.9%	2.3%
45 to 54	3.4%	14.0%	0.8%	3.0%	1.1%	0.8%	47.6%	0.4%	6.0%	0.4%
55 to 64	0.4%	16.2%	0.0%	1.3%	0.0%	0.0%	41.1%	0.4%	7.4%	0.0%
65 to 74	0.0%	15.7%	0.0%	0.0%	0.0%	0.0%	32.7%	0.0%	11.6%	0.0%
75 or older	0.0%	10.7%	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%	7.1%	0.0%

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

Posed to all respondents.

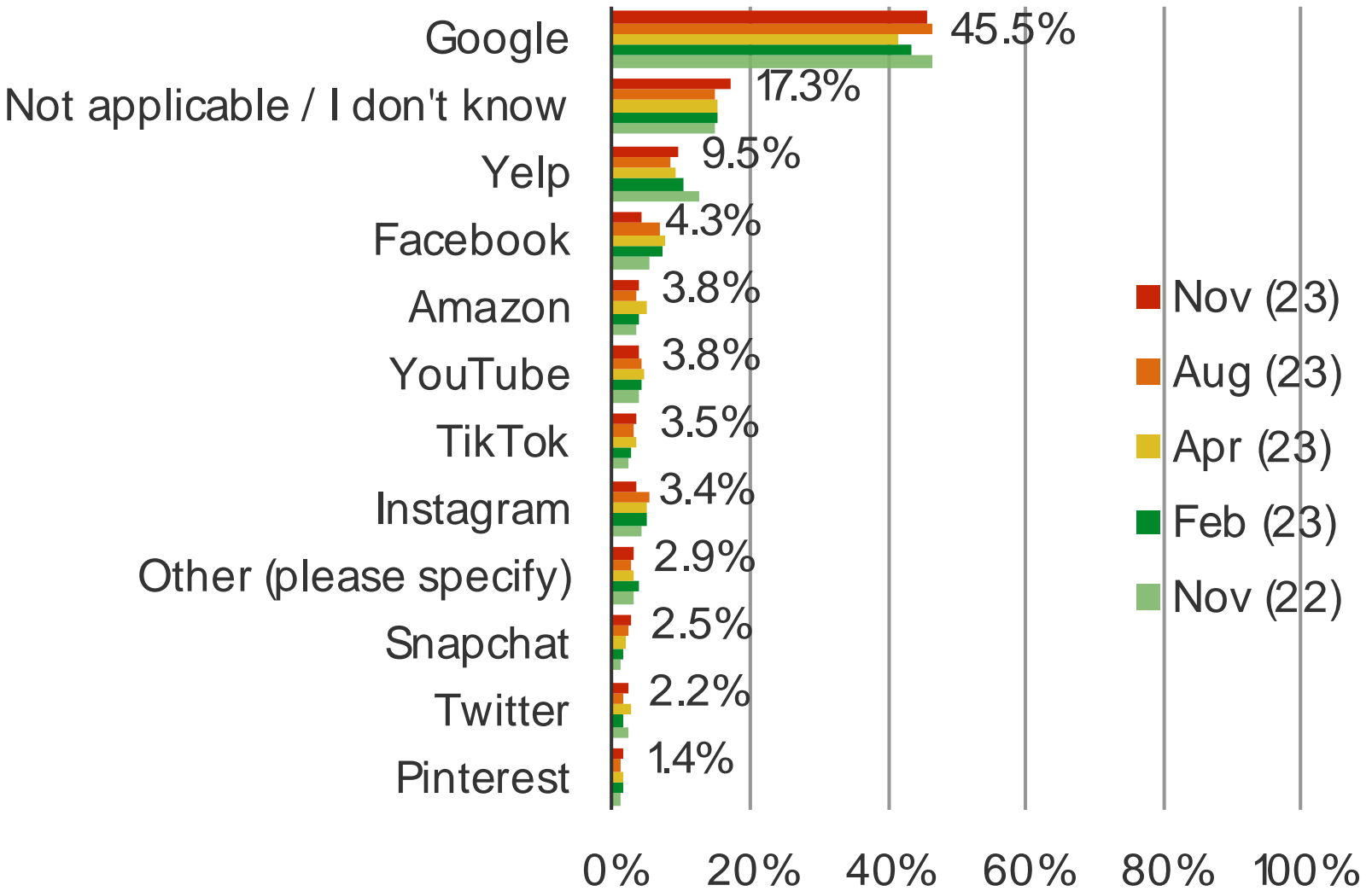


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	19.4%	3.6%	4.9%	4.2%	3.0%	3.0%	48.5%	0.6%	3.0%	1.8%
25 to 34	14.6%	3.6%	7.1%	7.1%	2.0%	4.4%	43.5%	0.0%	7.5%	2.0%
35 to 44	12.3%	5.8%	9.2%	8.1%	1.5%	5.4%	40.6%	1.5%	7.3%	1.5%
45 to 54	6.8%	10.6%	1.5%	5.7%	0.4%	1.5%	59.3%	0.8%	2.3%	0.0%
55 to 64	2.2%	12.2%	0.4%	4.4%	0.0%	0.0%	53.7%	0.4%	3.9%	0.0%
65 to 74	0.7%	9.5%	2.0%	2.0%	0.0%	0.0%	50.3%	0.0%	4.8%	0.7%
75 or older	0.0%	10.7%	0.9%	0.9%	0.0%	0.0%	17.0%	0.0%	7.1%	0.0%

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

Posed to all respondents.

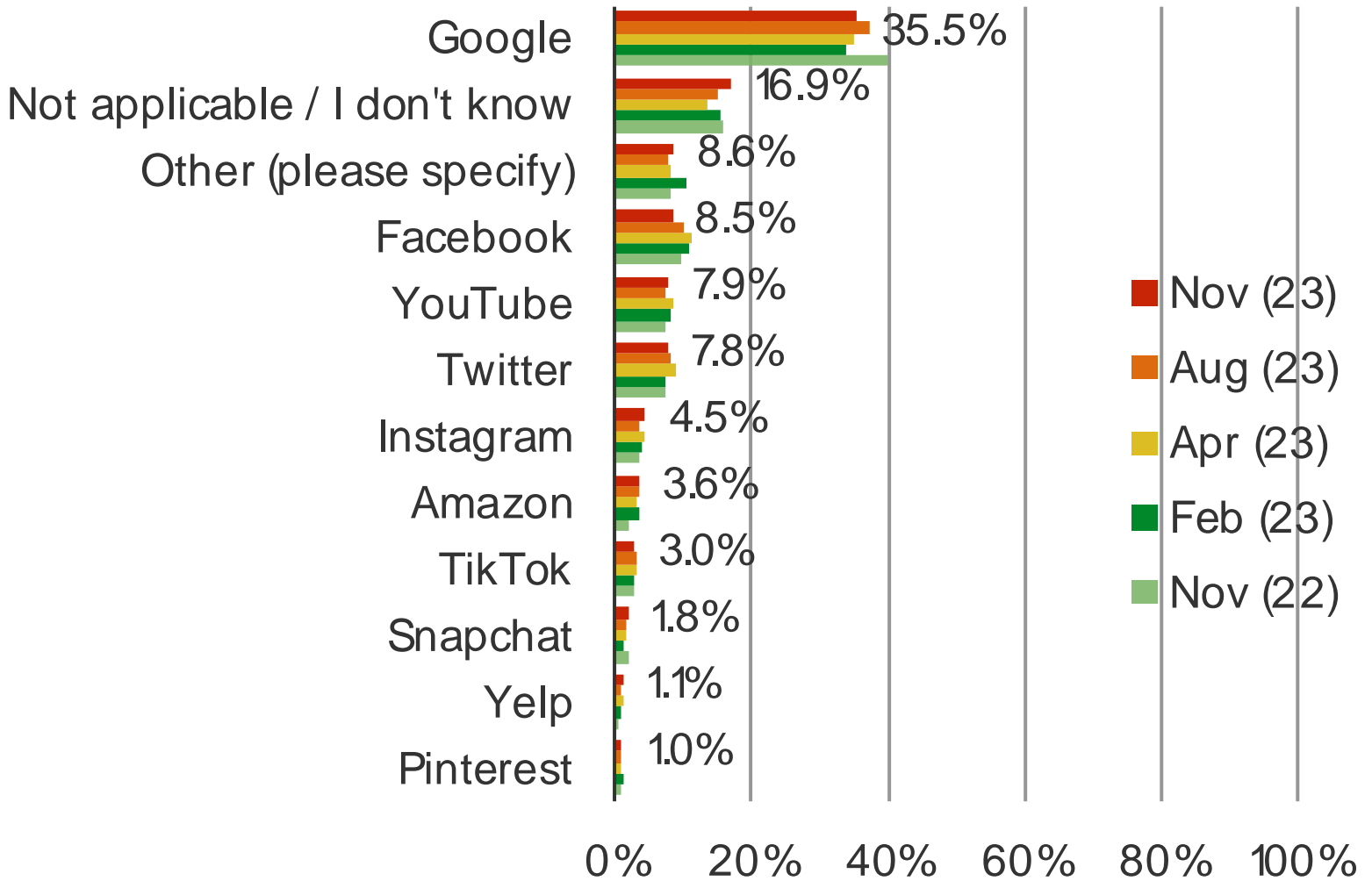


Cross-tabbing the data by age...

	TikTok	Google	Instagram	Facebook	Twitter	Snapchat	YouTube	Yelp	Amazon	Pinterest
18 to 24	7.9%	41.2%	5.5%	4.9%	4.2%	3.6%	8.5%	7.9%	1.8%	4.2%
25 to 34	5.1%	41.9%	6.7%	6.7%	3.2%	4.7%	3.6%	10.3%	6.7%	1.6%
35 to 44	7.3%	35.6%	8.4%	7.7%	2.7%	4.6%	5.8%	7.3%	7.7%	3.1%
45 to 54	1.1%	56.6%	1.5%	3.4%	1.5%	0.4%	3.8%	8.7%	3.4%	0.0%
55 to 64	0.4%	57.6%	0.0%	3.5%	0.4%	0.4%	0.4%	10.5%	0.9%	0.0%
65 to 74	0.0%	49.7%	0.7%	0.7%	0.7%	0.0%	1.4%	14.3%	0.0%	0.0%
75 or older	0.0%	42.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%

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
18 to 24	6.7%	33.3%	8.5%	11.5%	13.3%	3.6%	7.9%	1.8%	3.0%	1.2%
25 to 34	4.0%	34.8%	7.1%	12.7%	7.1%	3.2%	9.5%	0.8%	6.3%	0.8%
35 to 44	4.6%	24.9%	6.5%	11.1%	11.5%	4.2%	8.8%	3.5%	6.9%	3.8%
45 to 54	1.1%	42.3%	3.8%	7.6%	7.6%	0.0%	9.4%	0.0%	1.5%	0.8%
55 to 64	0.9%	43.7%	0.9%	4.4%	3.5%	0.0%	7.4%	0.4%	0.4%	0.0%
65 to 74	0.0%	49.0%	0.7%	3.4%	4.1%	0.0%	4.1%	0.0%	2.0%	0.7%
75 or older	0.0%	29.5%	0.0%	5.4%	0.9%	0.0%	5.4%	0.0%	0.0%	0.0%