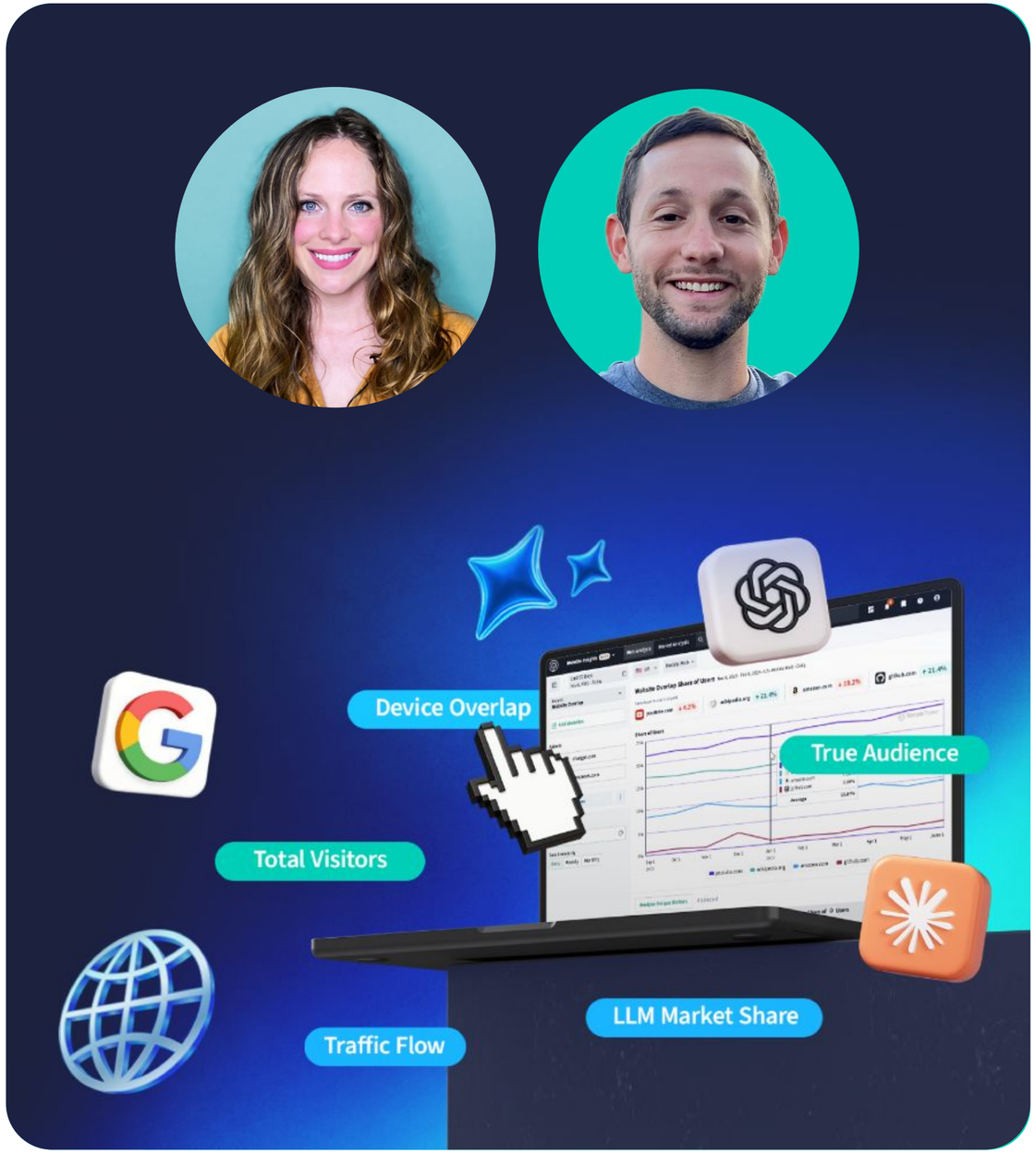
SensorTower

Digital Truth: **What Marketers See When Mobile, Web & AI Data Finally Connect**

June 3 | 12:30 PM ET / 3:30 PM PT



Speakers



Lexi Sydow
Chief Analyst & Founder, The ATTN Economy
Insights Advisor, Sensor Tower

lexi@attneconomy.com



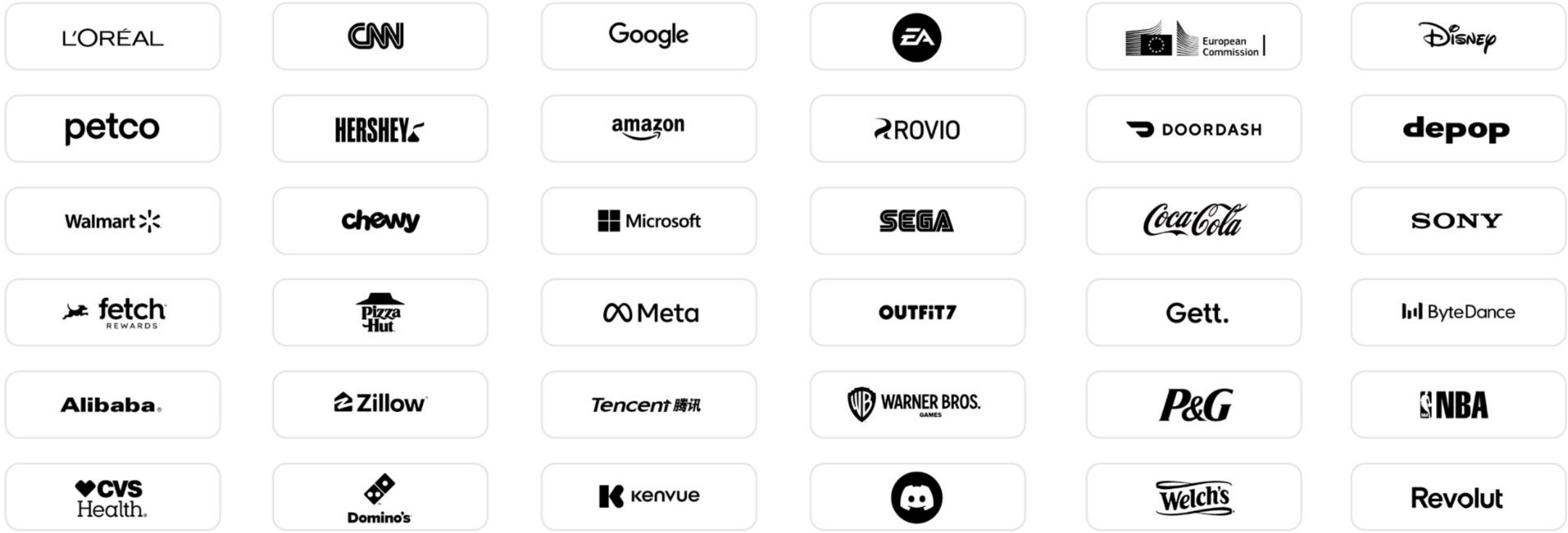
Jonathan Briskman
Director, Market Insights
Sensor Tower

jonathan.briskman@sensortower.com

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Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business



Note: Top publishers by app store revenue | Source: Sensor Tower

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SensorTower

The leader in digital market insights since 2013

Providing comprehensive digital insights to market leaders across the globe



Mobile App



Gaming



Digital Advertising



Retail Media



Audience



Website

Data-driven, people-powered.

Our data comes from a panel of more than 5 million consumers, enriched by our data scientists and proprietary algorithms.

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Agenda

Where Are Consumers Engaging?

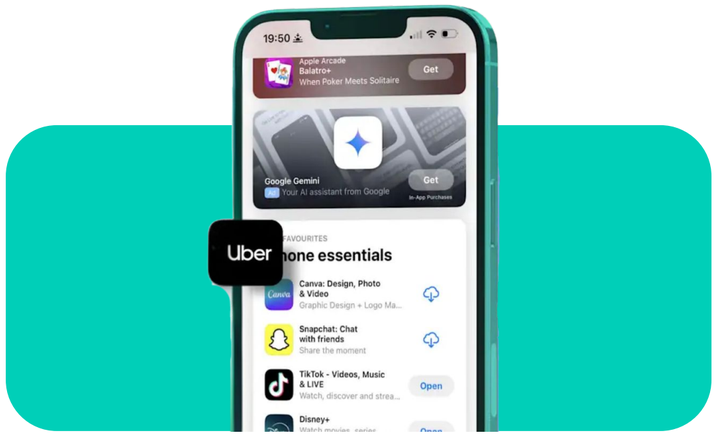
GenAI: Is It Really Disrupting the Marketing Funnel?

User Journey: How are Users Discovering Brands?

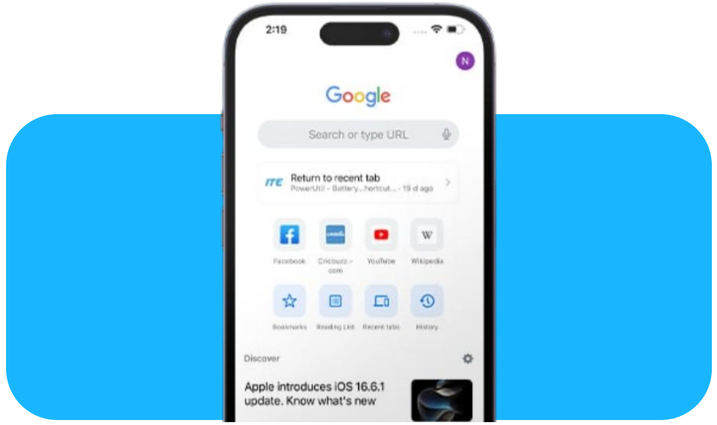
Q&A

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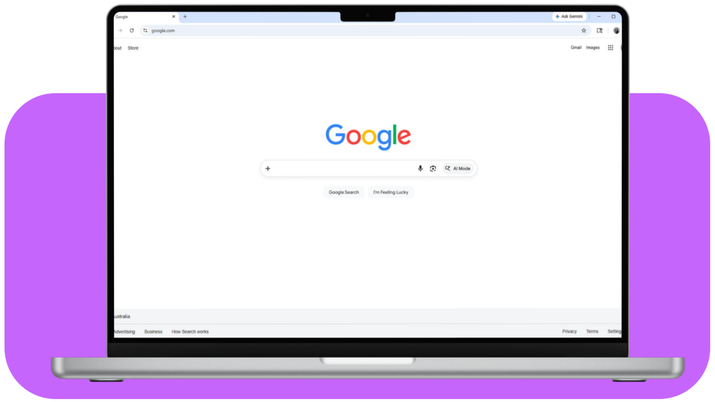
Today’s Fragmented Digital Ecosystem



Mobile App



Mobile Web



Desktop Web



Email Marketing



Social

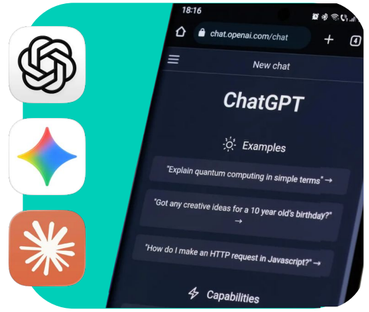


Advertising

Mobile, OTT, TV



Search Engine



ChatGPT / GenAI

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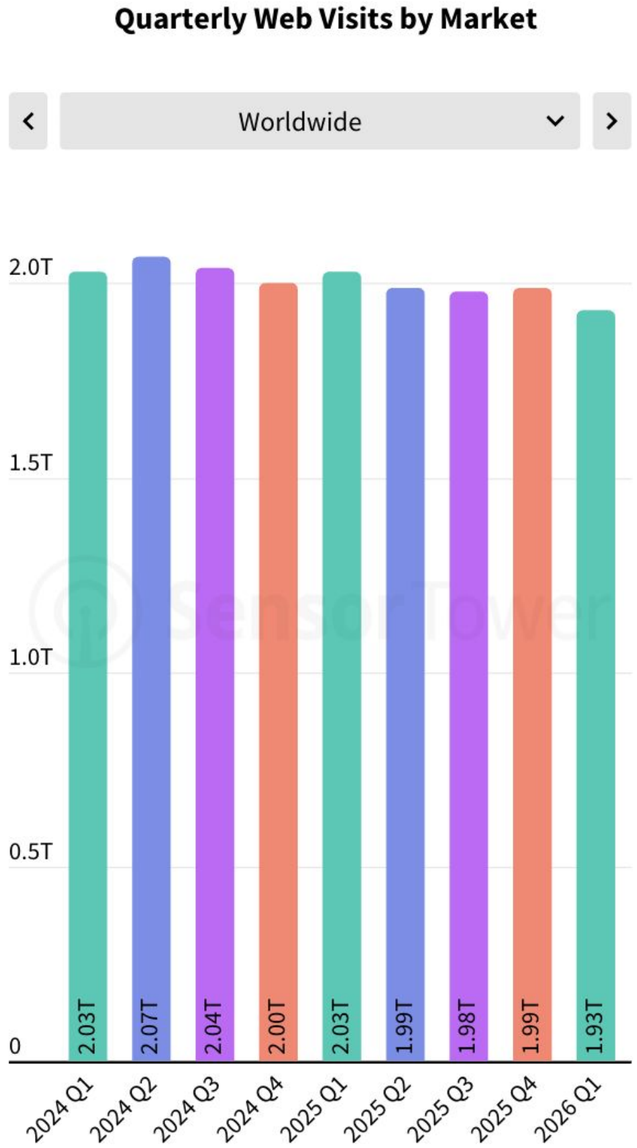
Where Are **Consumers Engaging?**

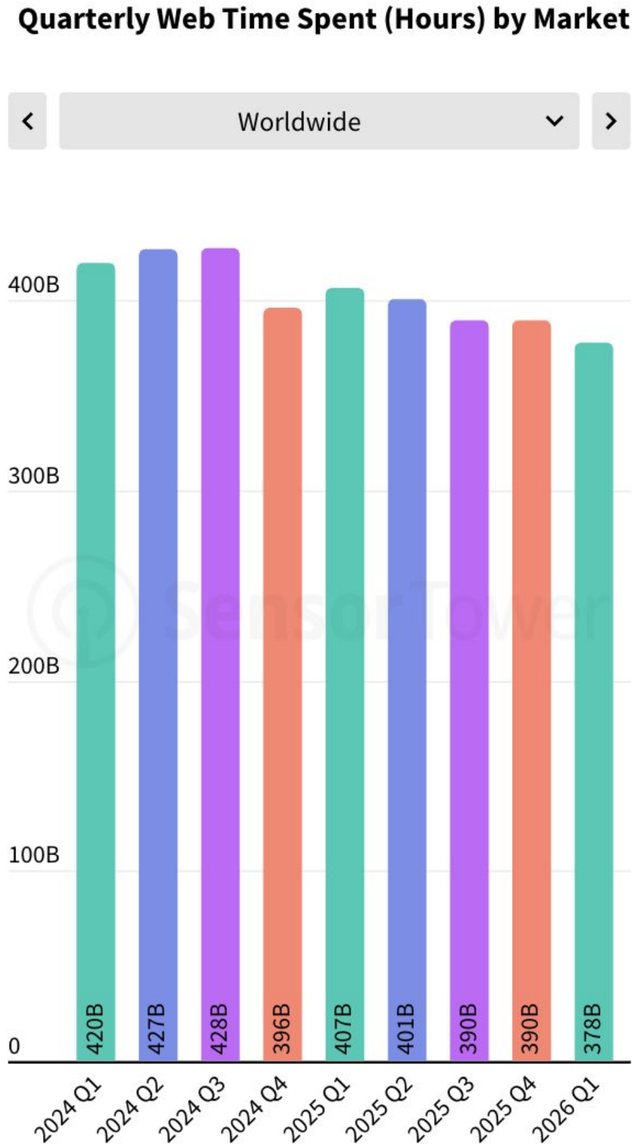


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Web Traffic Trends

Website traffic is declining. Engagement is declining even faster.

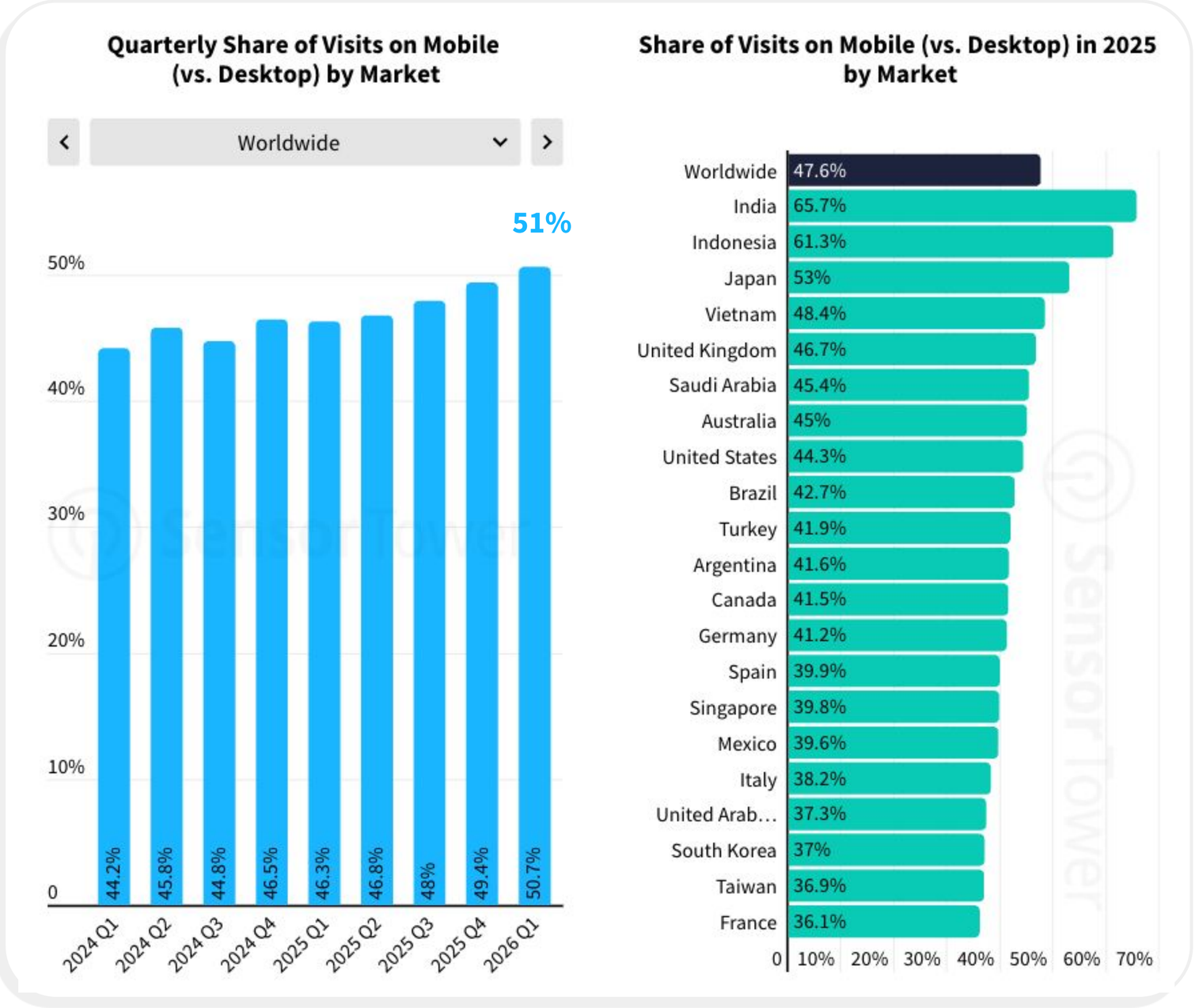




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Mobile vs Desktop

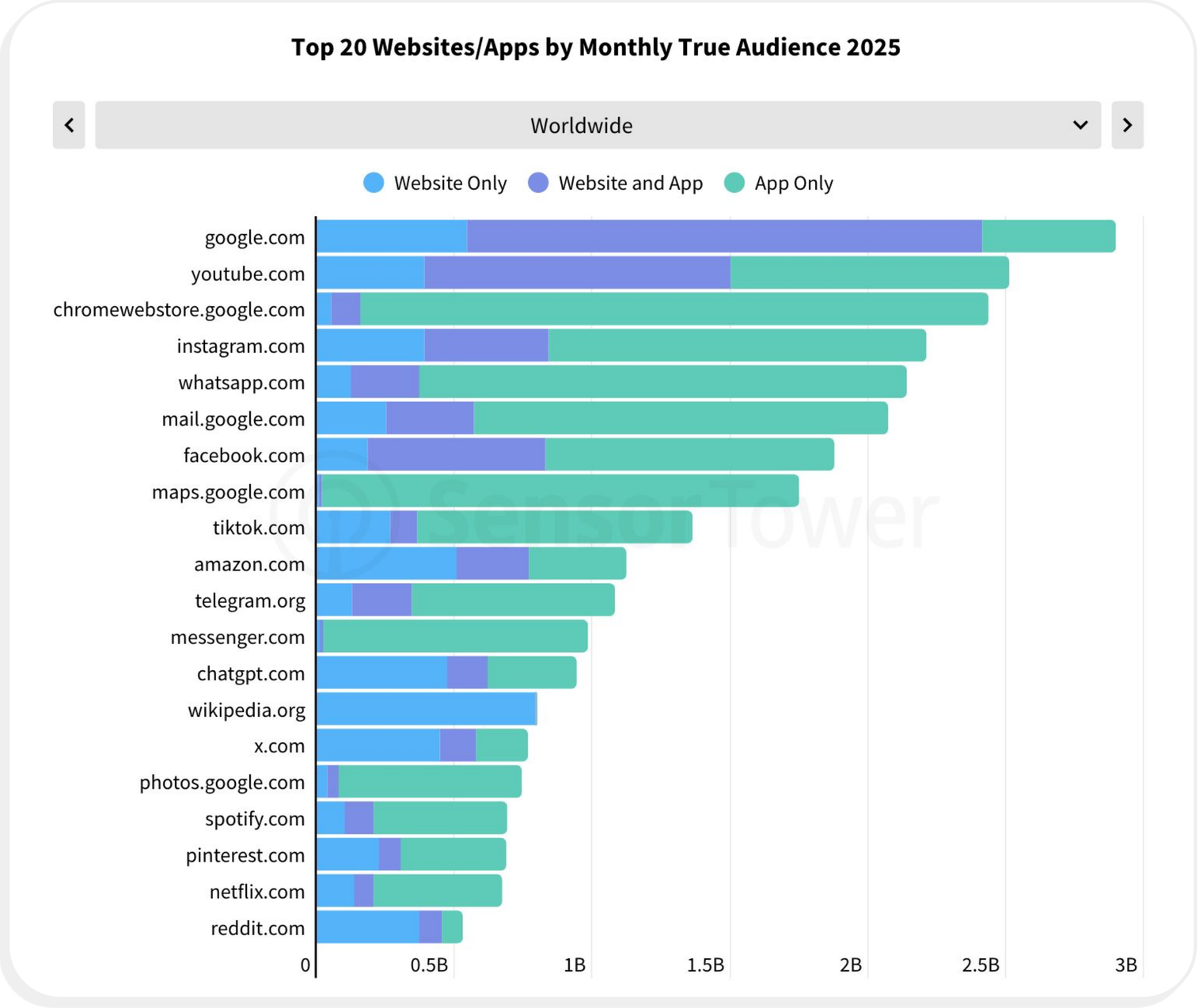
Mobile is making up a greater share of web traffic.



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Web vs App: True Audience

Deduplicated audience shows that for the majority of top sites, mobile app is the biggest audience.

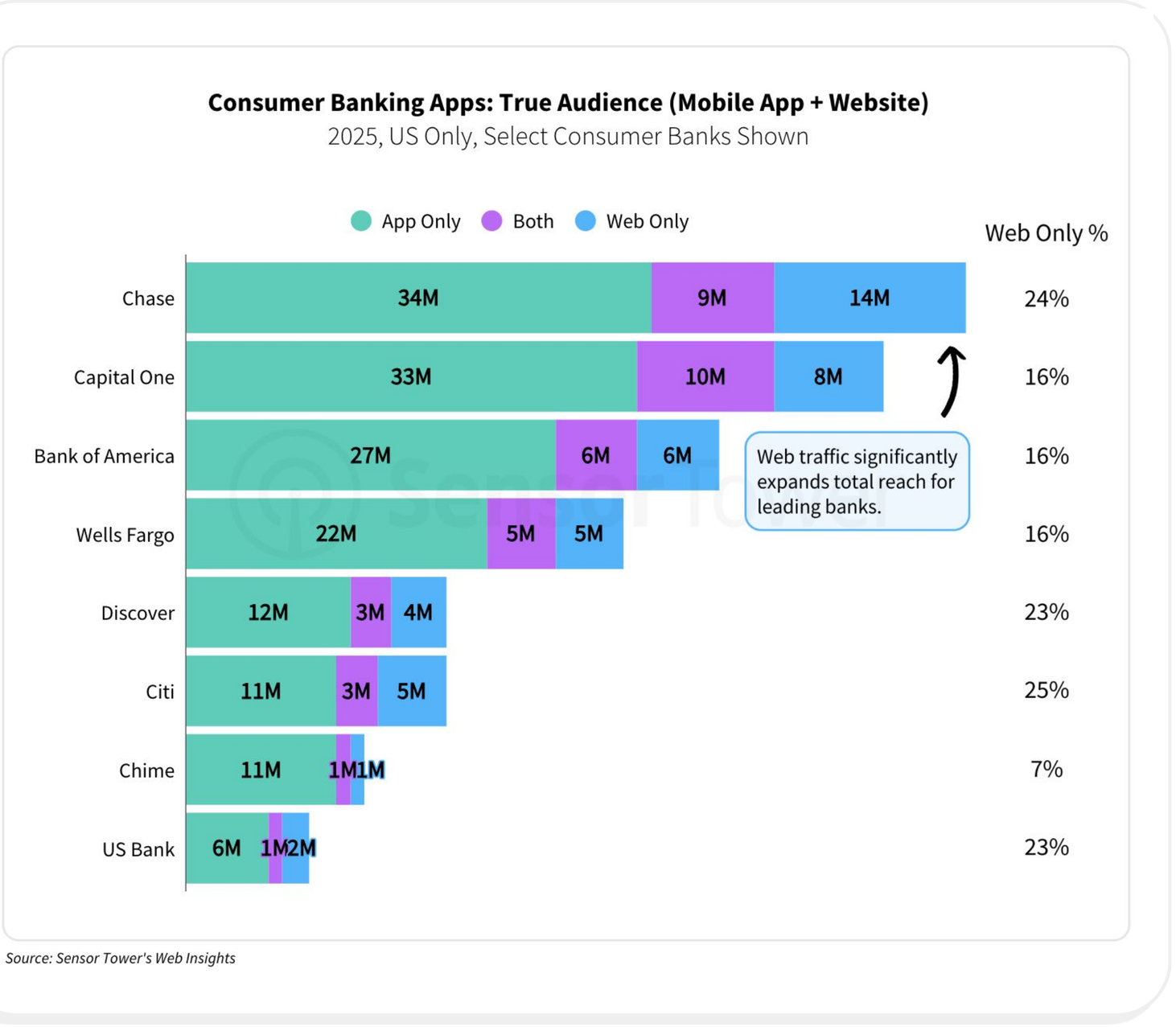


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Spotlight: Competitive Set

How do banks really stack up?

Web and app usage highlight previously hidden strengths and weaknesses



Source: Sensor Tower's Web Insights

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Spotlight: Competitive Set

Chase: Current Audience vs Ad-Exposed Audience

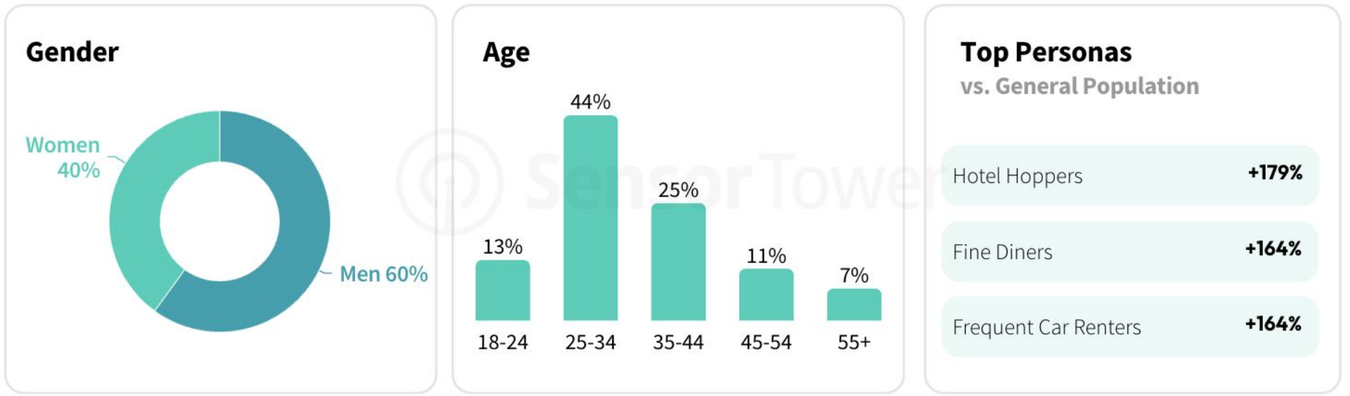
Targeting Women and Younger Demos with Different Intent-Drivers

Audience Insights
Targeting: Who Sees Their Ads?

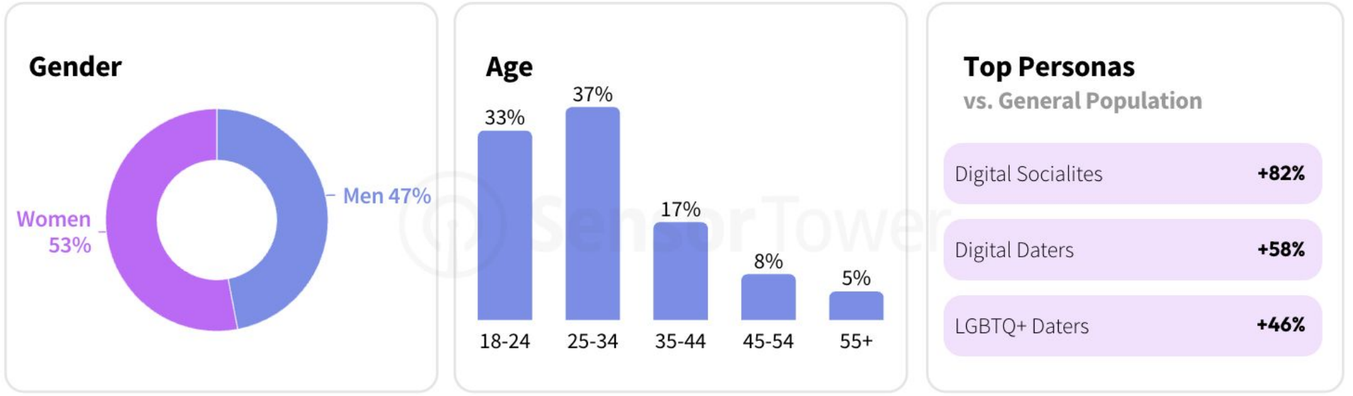
Chase: Current App Users vs. Ad-Exposed Audience

Full Year 2025, US Only

Chase: Current App Users



Chase: Ad-Exposed Audience



Source: Sensor Tower's Audience Insights

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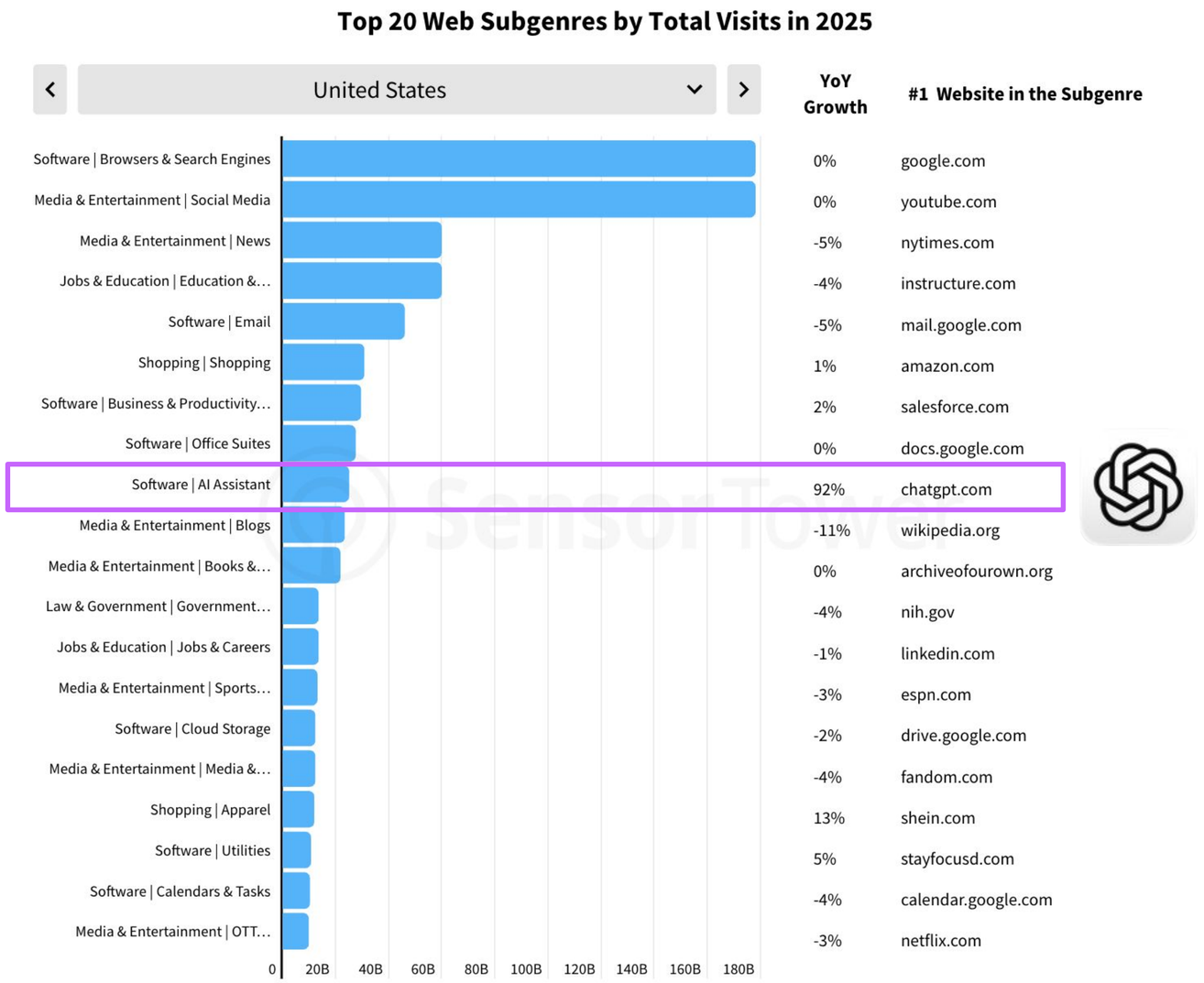


GenAI:
Disrupting the Marketing Funnel

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Who is Bucking that Trend?

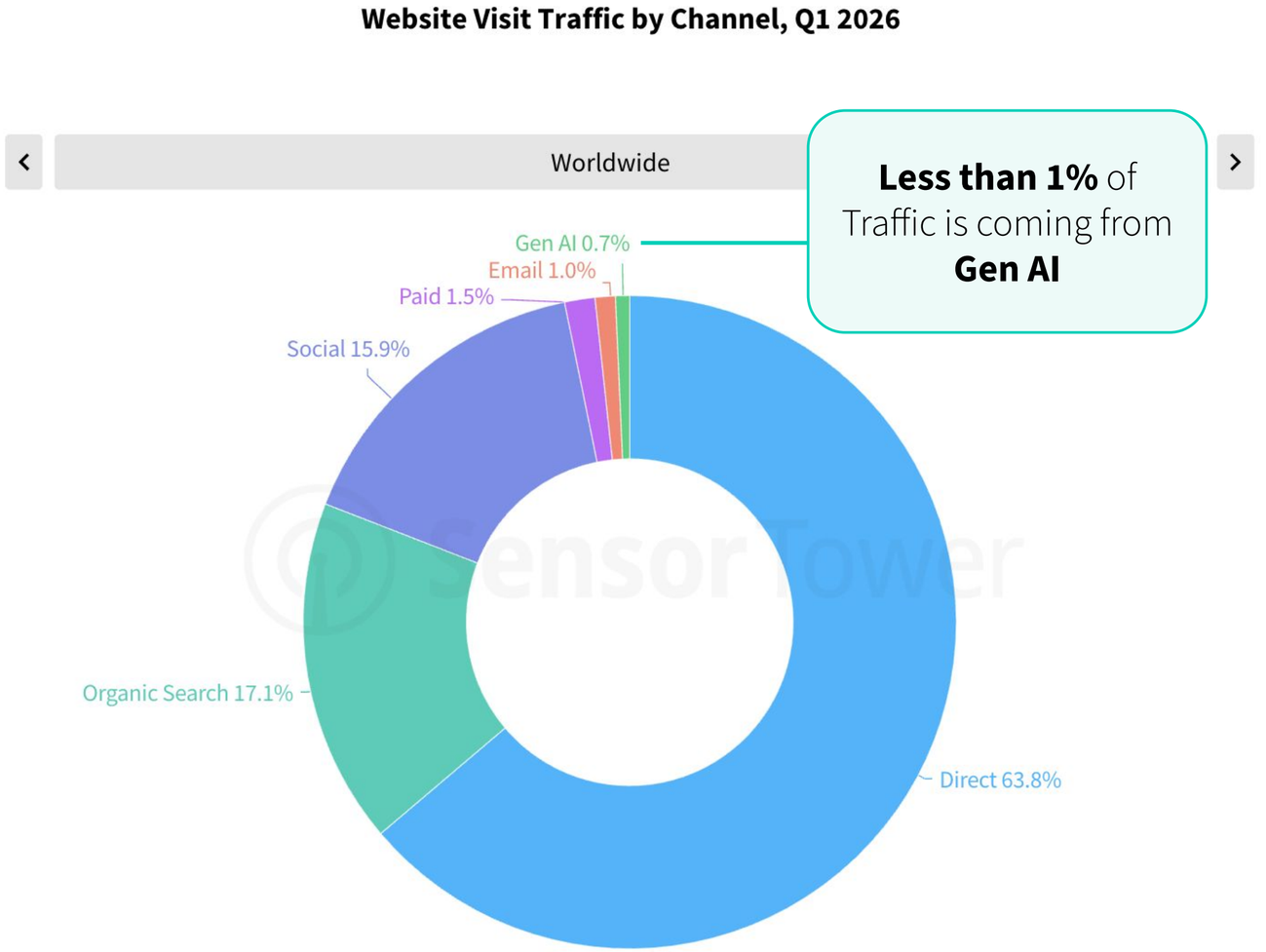
GenAI Tools rank 5th in 2025 for total web traffic globally and 9th in the US.



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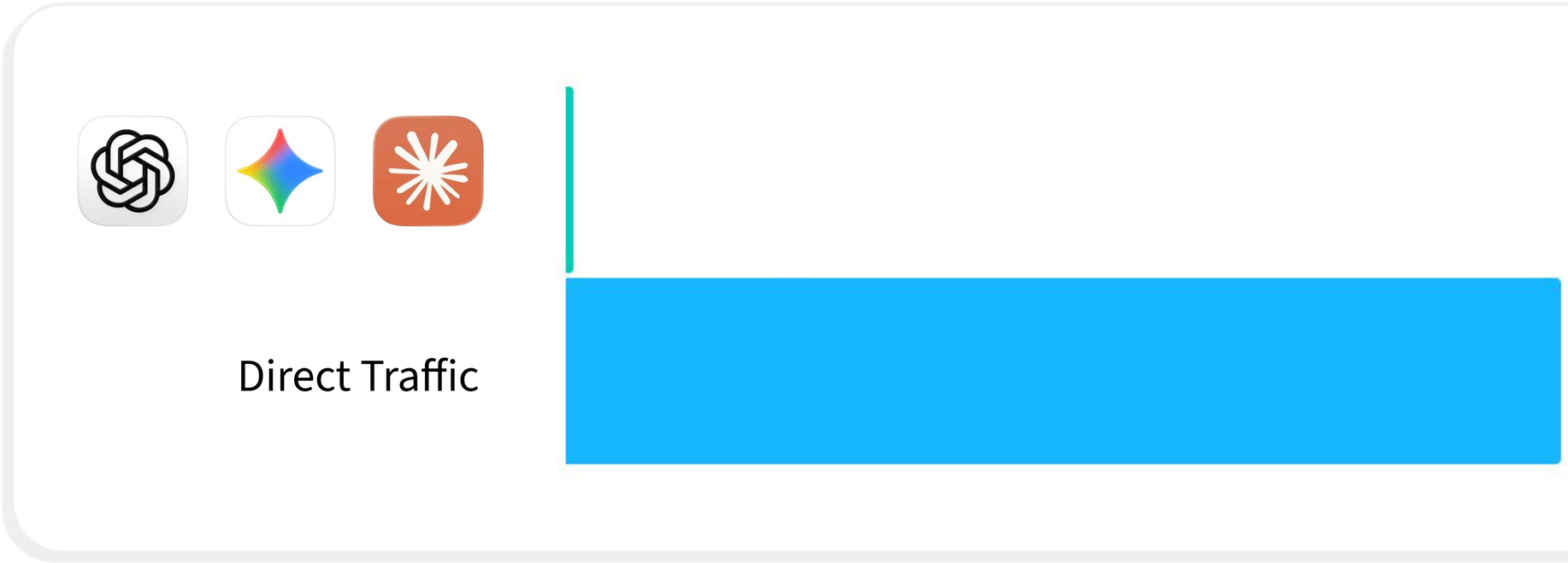
Where is Referral Traffic Coming From?

Organic and Direct make up 81% of all traffic.



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For every 1 traffic referral from GenAI,
125 visits come from people going directly to your website.



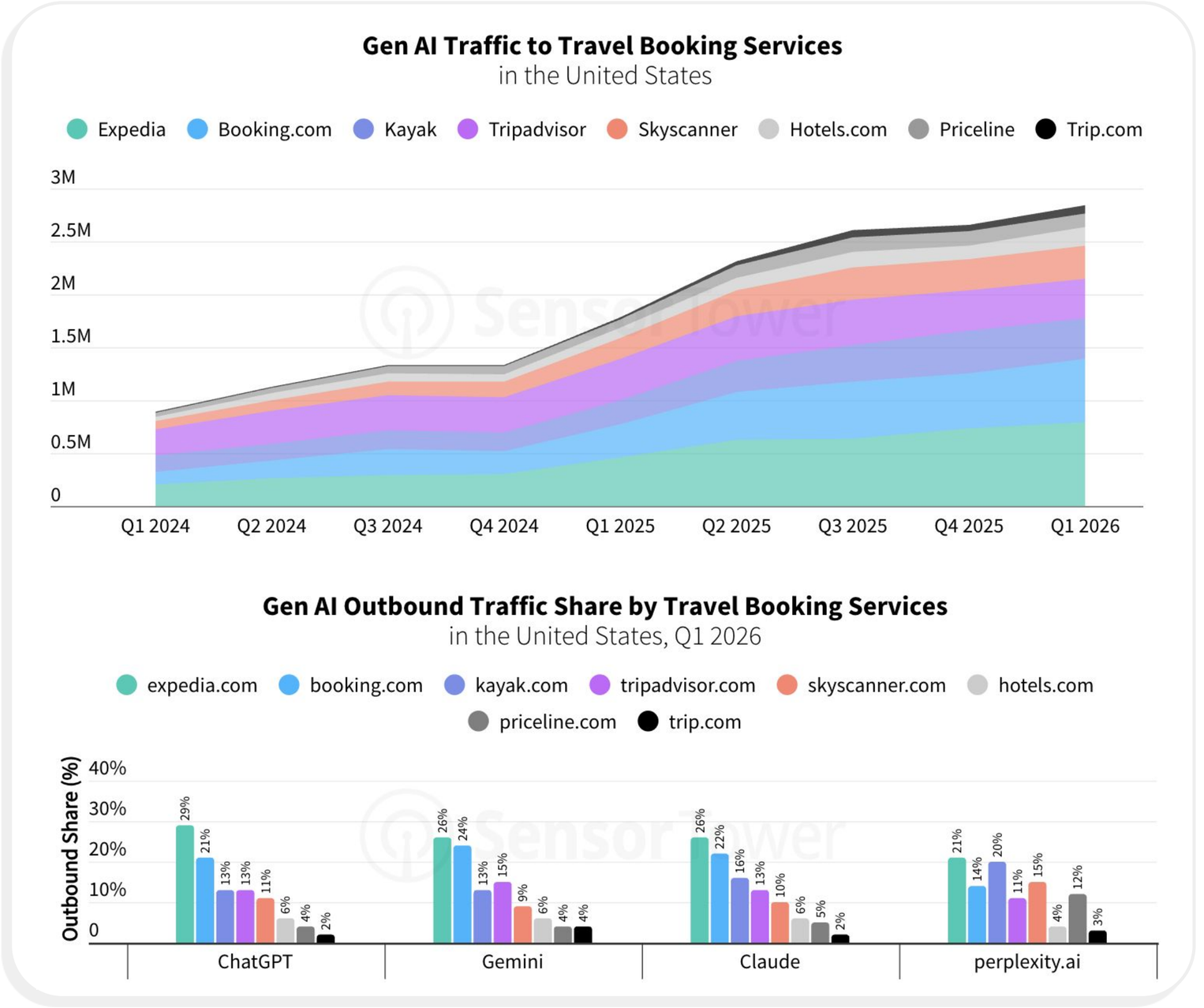
Takeaway: Brand is more important than ever

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Spotlight: Travel Booking

Travel Concierge

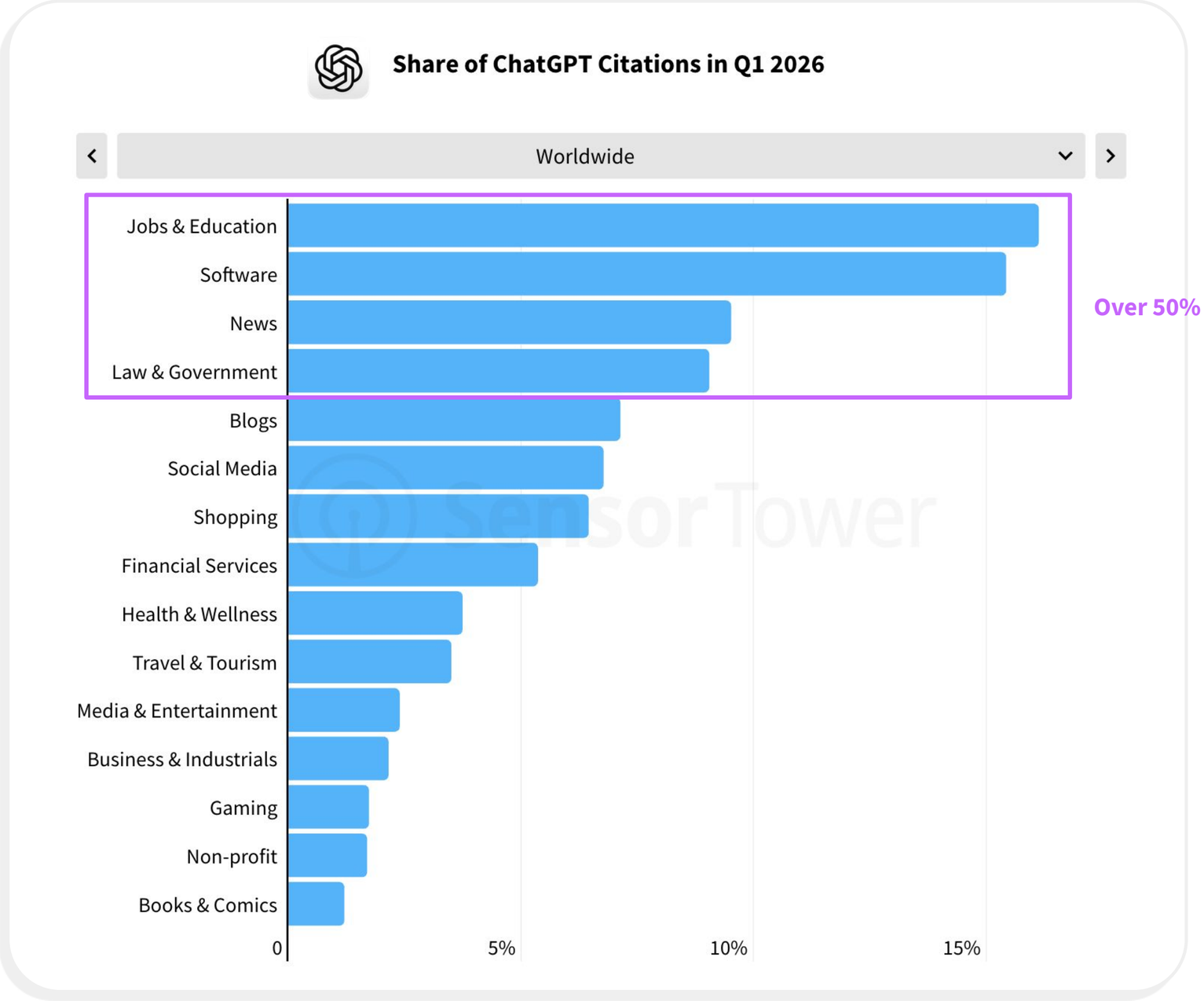
50% of post-session traffic for trip fulfillment from ChatGPT, Gemini and Claude went to two sites:



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What About Citations?

The bulk of ChatGPT citations are within jobs, education, software, news and law & government.

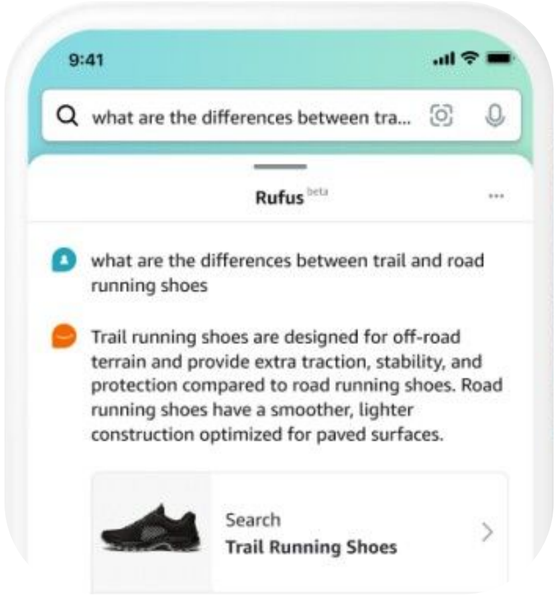


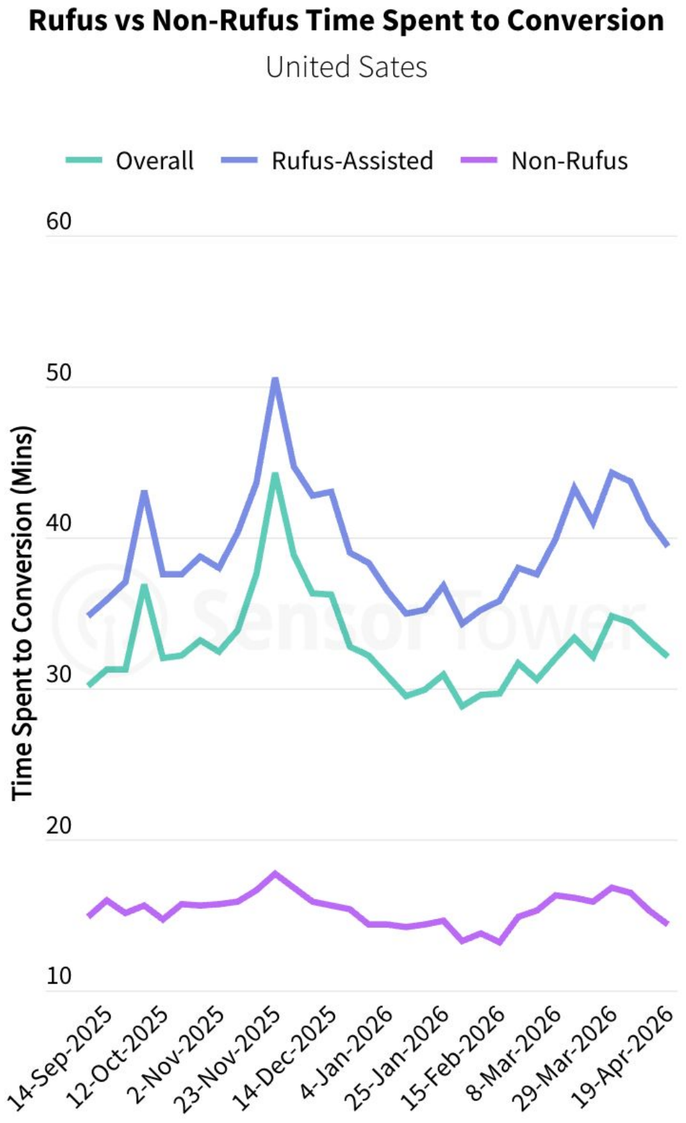
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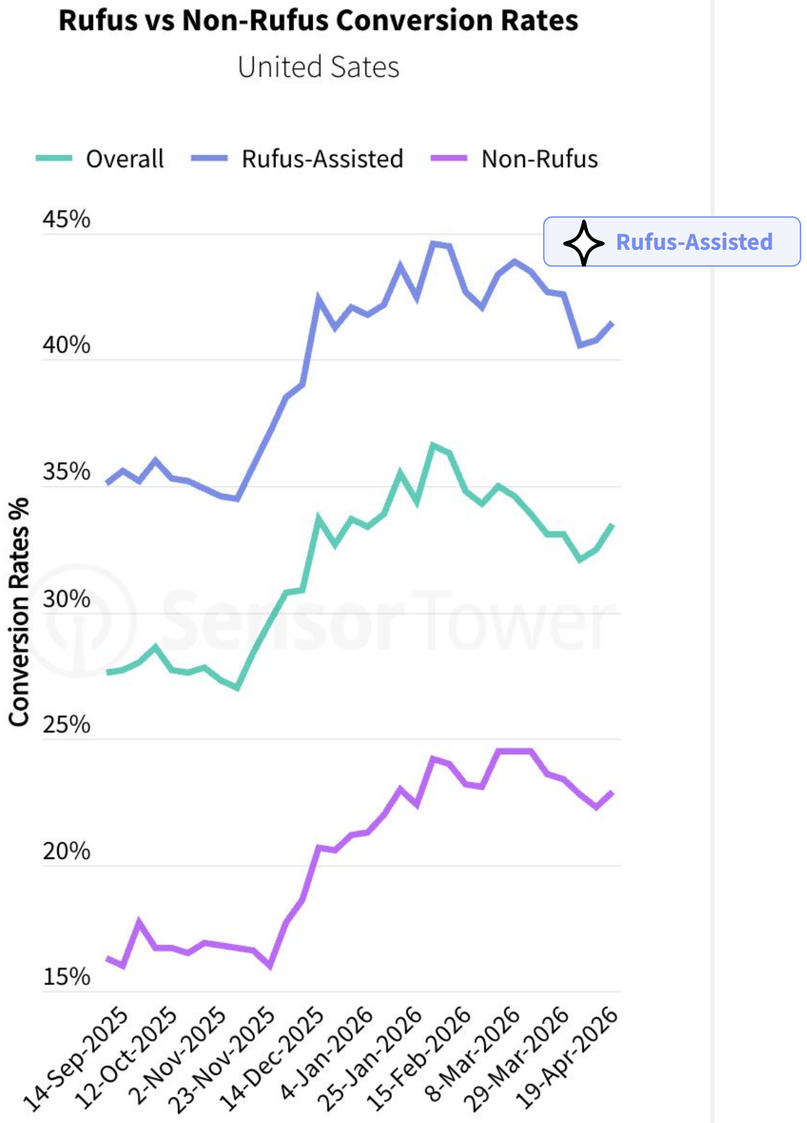
Spotlight: AI-Assisted Shopping

Amazon’s Rufus Saw 2.7x Higher CVR

However, during big sales, this behavior dropped.



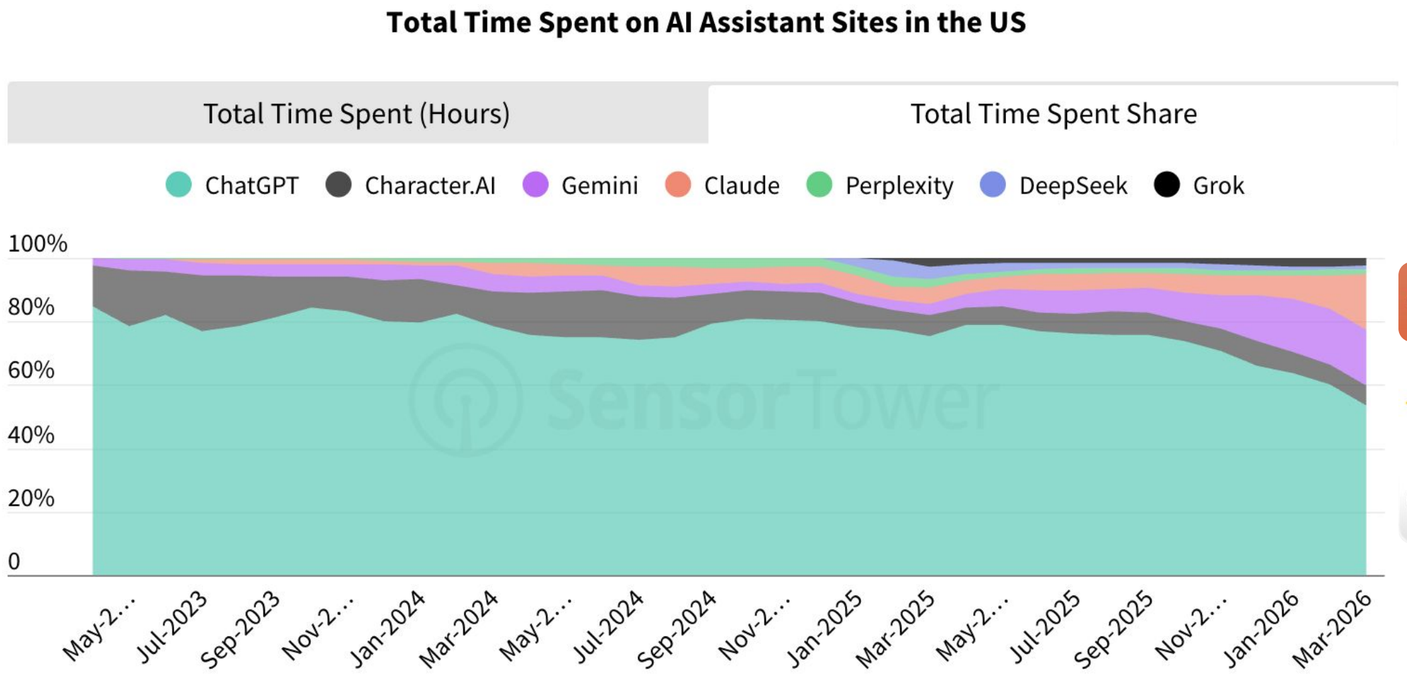


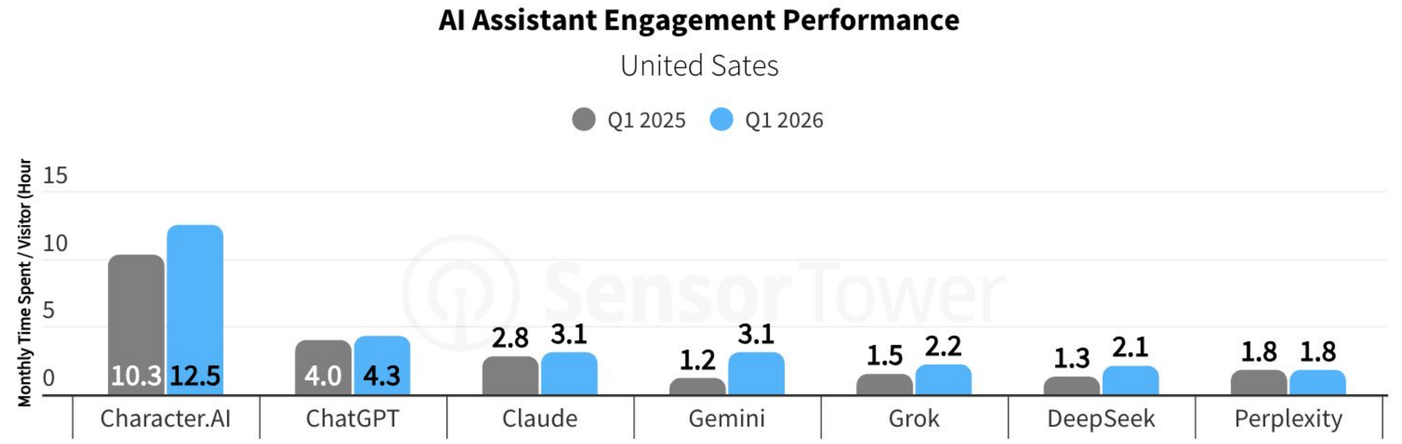


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Which GenAI Tool Should You Prioritize?

Where are consumers spending time and having deep interactions?





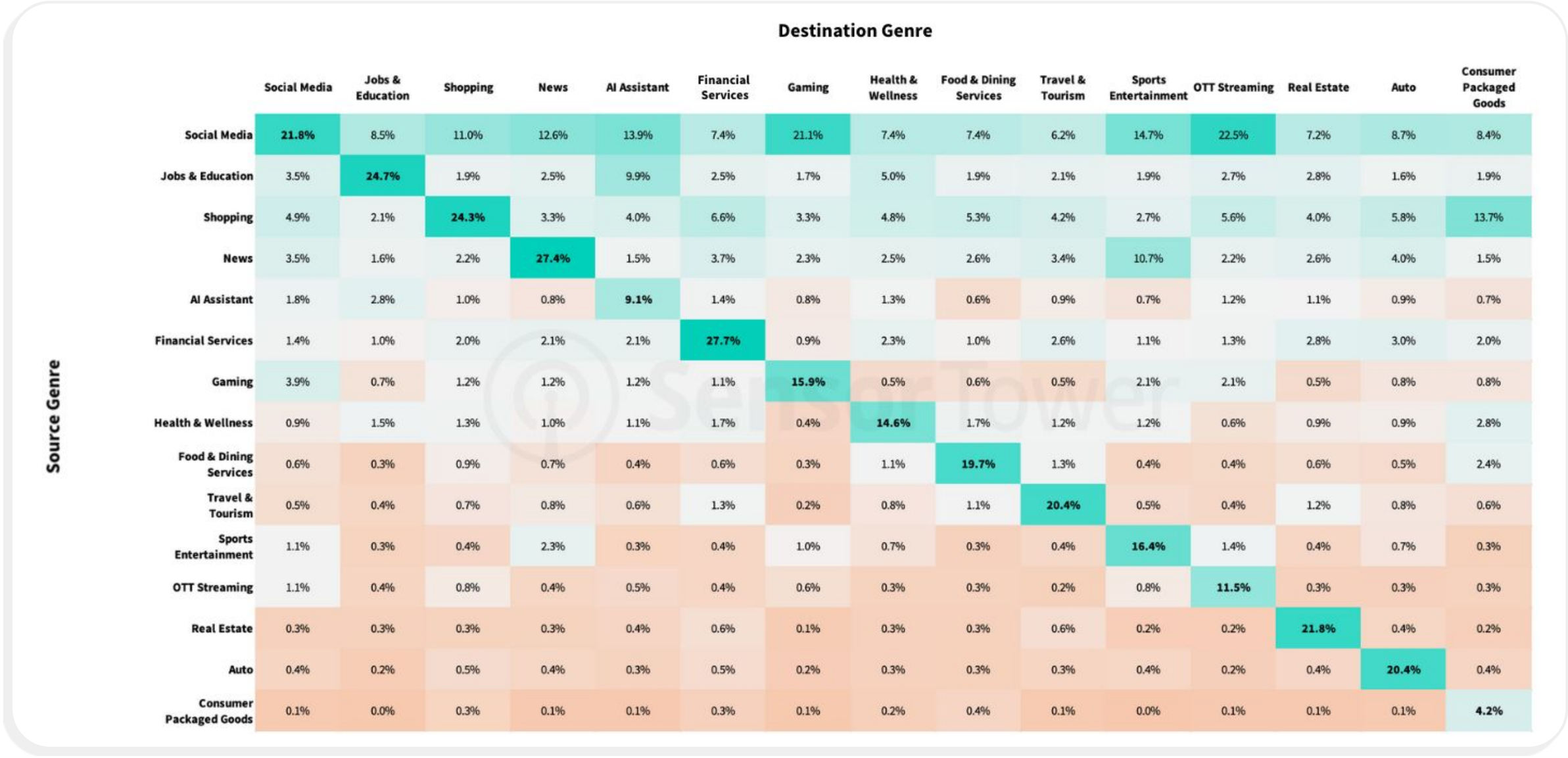
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User Journey:
How Are Consumers Discovering Brands?

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User Journey: What are the primary discovery gateways?

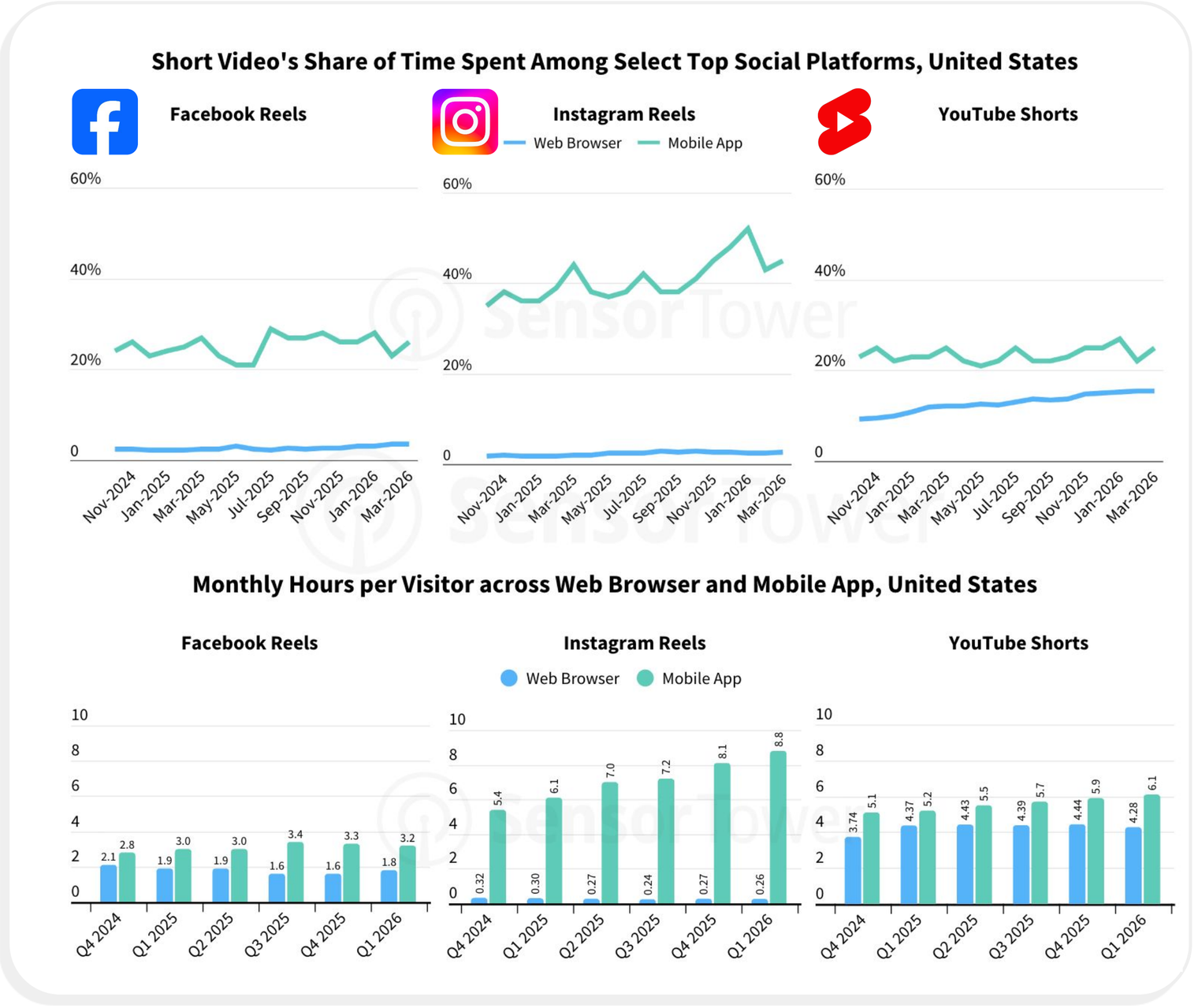


Source Genre \ Destination Genre	Social Media	Jobs & Education	Shopping	News	AI Assistant	Financial Services	Gaming	Health & Wellness	Food & Dining Services	Travel & Tourism	Sports Entertainment	OTT Streaming	Real Estate	Auto	Consumer Packaged Goods
Social Media	**21.8%**	8.5%	11.0%	12.6%	13.9%	7.4%	21.1%	7.4%	7.4%	6.2%	14.7%	22.5%	7.2%	8.7%	8.4%
Jobs & Education	3.5%	**24.7%**	1.9%	2.5%	9.9%	2.5%	1.7%	5.0%	1.9%	2.1%	1.9%	2.7%	2.8%	1.6%	1.9%
Shopping	4.9%	2.1%	**24.3%**	3.3%	4.0%	6.6%	3.3%	4.8%	5.3%	4.2%	2.7%	5.6%	4.0%	5.8%	13.7%
News	3.5%	1.6%	2.2%	**27.4%**	1.5%	3.7%	2.3%	2.5%	2.6%	3.4%	10.7%	2.2%	2.6%	4.0%	1.5%
AI Assistant	1.8%	2.8%	1.0%	0.8%	**9.1%**	1.4%	0.8%	1.3%	0.6%	0.9%	0.7%	1.2%	1.1%	0.9%	0.7%
Financial Services	1.4%	1.0%	2.0%	2.1%	2.1%	**27.7%**	0.9%	2.3%	1.0%	2.6%	1.1%	1.3%	2.8%	3.0%	2.0%
Gaming	3.9%	0.7%	1.2%	1.2%	1.2%	1.1%	**15.9%**	0.5%	0.6%	0.5%	2.1%	2.1%	0.5%	0.8%	0.8%
Health & Wellness	0.9%	1.5%	1.3%	1.0%	1.1%	1.7%	0.4%	**14.6%**	1.7%	1.2%	1.2%	0.6%	0.9%	0.9%	2.8%
Food & Dining Services	0.6%	0.3%	0.9%	0.7%	0.4%	0.6%	0.3%	1.1%	**19.7%**	1.3%	0.4%	0.4%	0.6%	0.5%	2.4%
Travel & Tourism	0.5%	0.4%	0.7%	0.8%	0.6%	1.3%	0.2%	0.8%	1.1%	**20.4%**	0.5%	0.4%	1.2%	0.8%	0.6%
Sports Entertainment	1.1%	0.3%	0.4%	2.3%	0.3%	0.4%	1.0%	0.7%	0.3%	0.4%	**16.4%**	1.4%	0.4%	0.7%	0.3%
OTT Streaming	1.1%	0.4%	0.8%	0.4%	0.5%	0.4%	0.6%	0.3%	0.3%	0.2%	0.8%	**11.5%**	0.3%	0.3%	0.3%
Real Estate	0.3%	0.3%	0.3%	0.3%	0.4%	0.6%	0.1%	0.3%	0.3%	0.6%	0.2%	0.2%	**21.8%**	0.4%	0.2%
Auto	0.4%	0.2%	0.5%	0.4%	0.3%	0.5%	0.2%	0.3%	0.3%	0.3%	0.4%	0.2%	0.4%	**20.4%**	0.4%
Consumer Packaged Goods	0.1%	0.0%	0.3%	0.1%	0.1%	0.3%	0.1%	0.2%	0.4%	0.1%	0.0%	0.1%	0.1%	0.1%	**4.2%**

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Social: Video

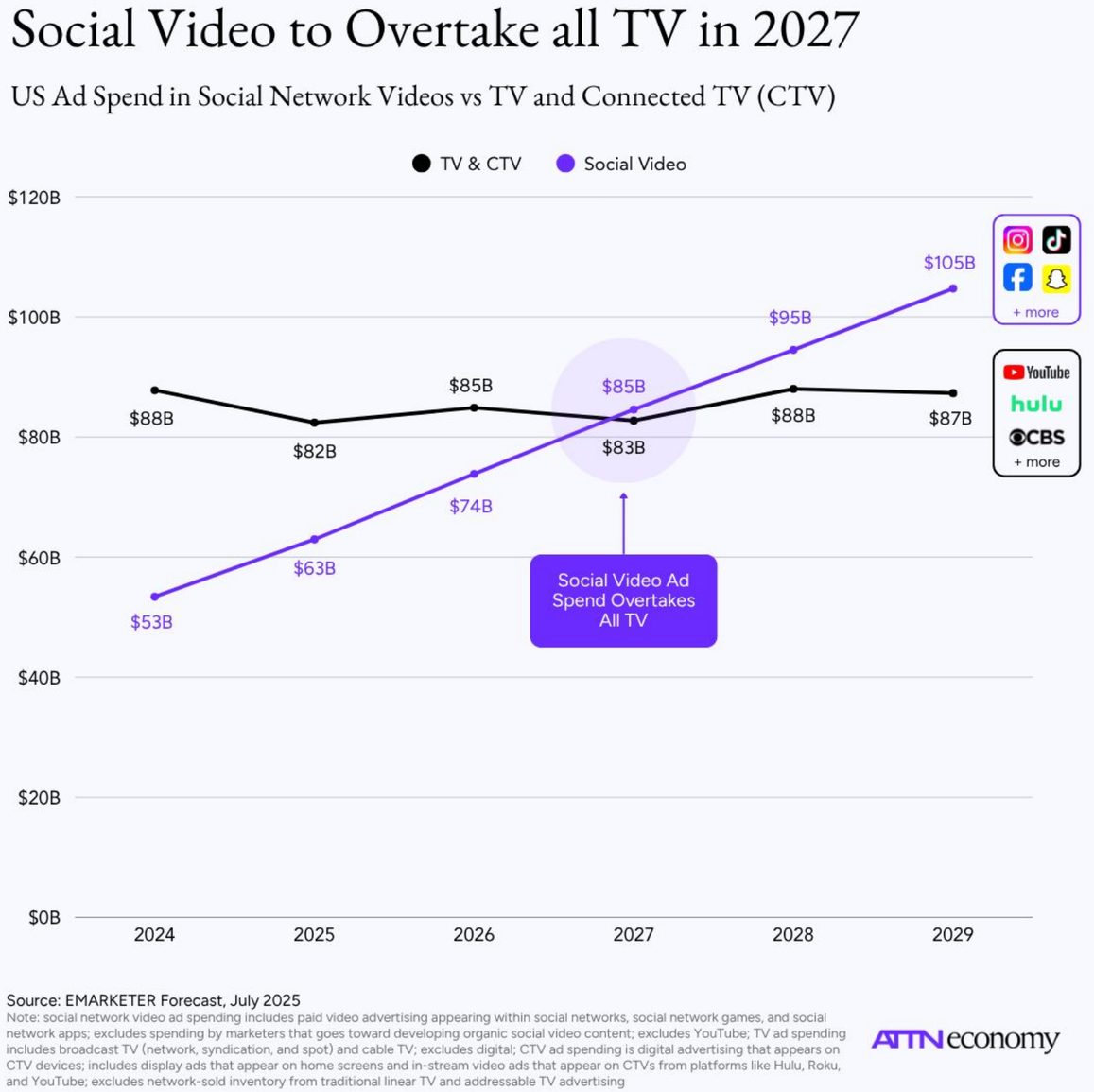
App video engagement is deeper and captures more time, but web shouldn't be ignored.



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In Fact, Social Video Set to Surpass TV in 2027

US Ad spend migrating to smaller screens.

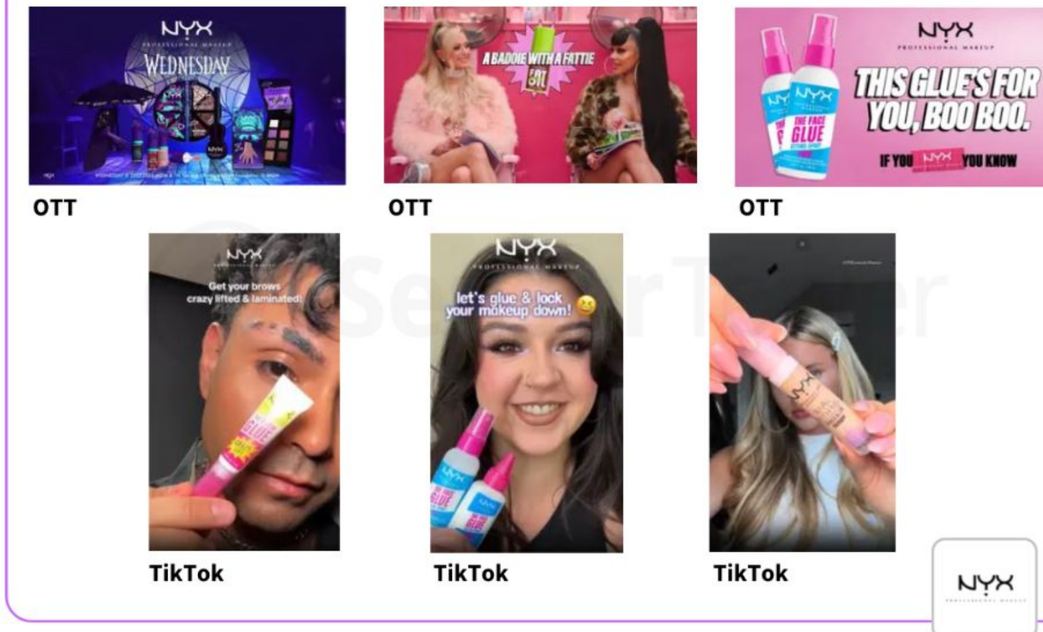


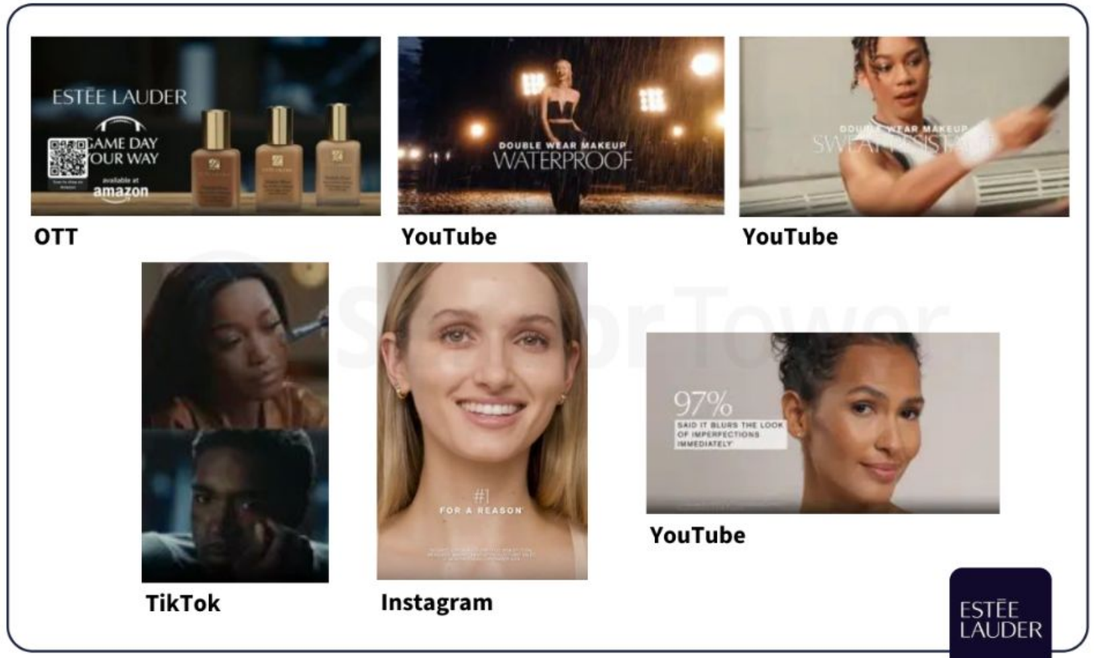
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Social-First Ad Spend: Nyx vs Estee Lauder

Pathmatics
Creative Strategy: How Are They Showing Up?

Ads

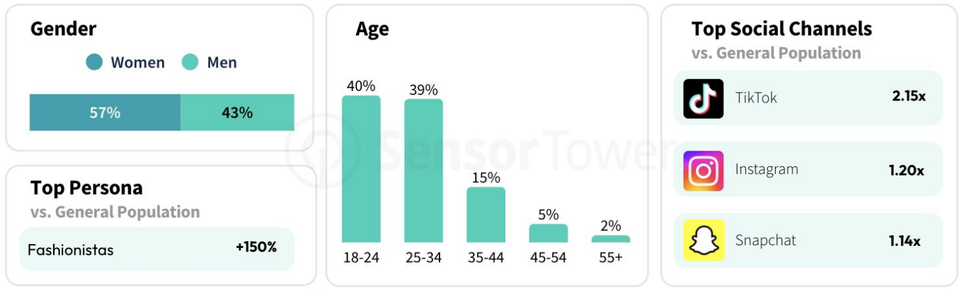




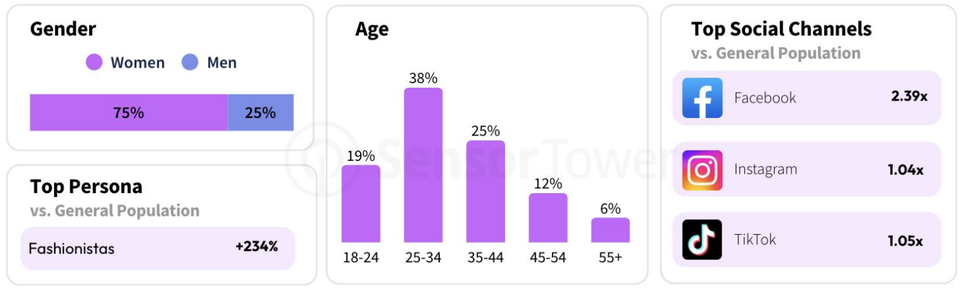
Source: Sensor Tower's Pathmatics

Ad-Exposed Audience

NYX Cosmetics
Ad-exposed audience, 2025, US Only



Estée Lauder
Ad-exposed audience, 2025, US only



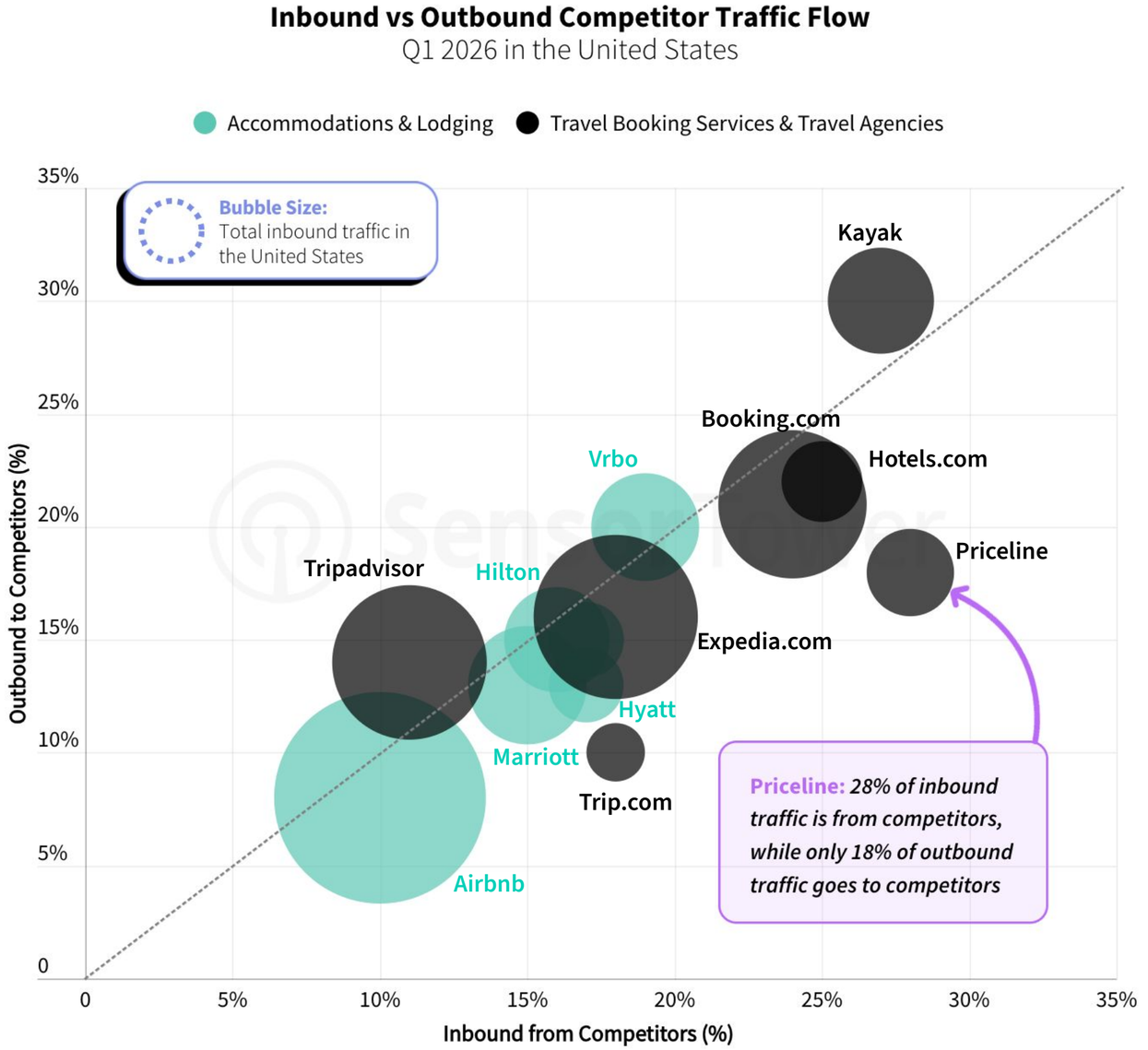
Source: Sensor Tower's Audience Insights

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Spotlight: Travel

The Leaky Bucket

Are you leaking traffic to competitors? Or are you capturing it?

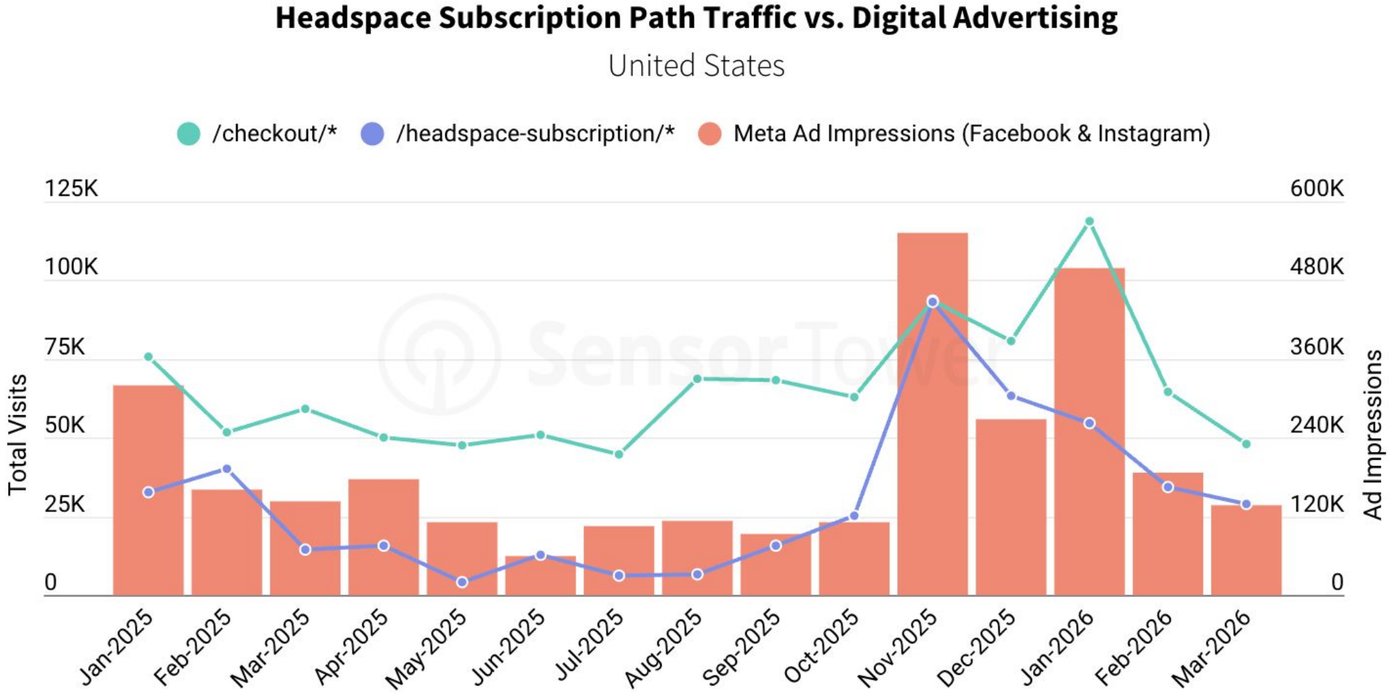


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Spotlight: Tracking Impact

Tying it Together

Mapping user journey with ad campaigns.



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Key Takeaways

Digital Truth: When Mobile, Web & AI Data Finally Connect



15.2M

Website Visits per Minute in 2025

-2% YoY



71%

Audience Uses App

Among the top 25 websites in the world.



<1%

GenAI Traffic to Websites

Direct and Organic Search epresent 81% of all traffic.



Social

Gateway to Discovery

16% of all traffic comes from social media (16x GenAI)

Web Traffic Declines, While Mobile Web's Share Increases

More people are accessing the web on-the-go.

Lions' Share of Audiences Use Both Mobile App and Web

Deduplicating across gives you a clear source of truth for where your audience is really engaging.

Brand is more important than ever.

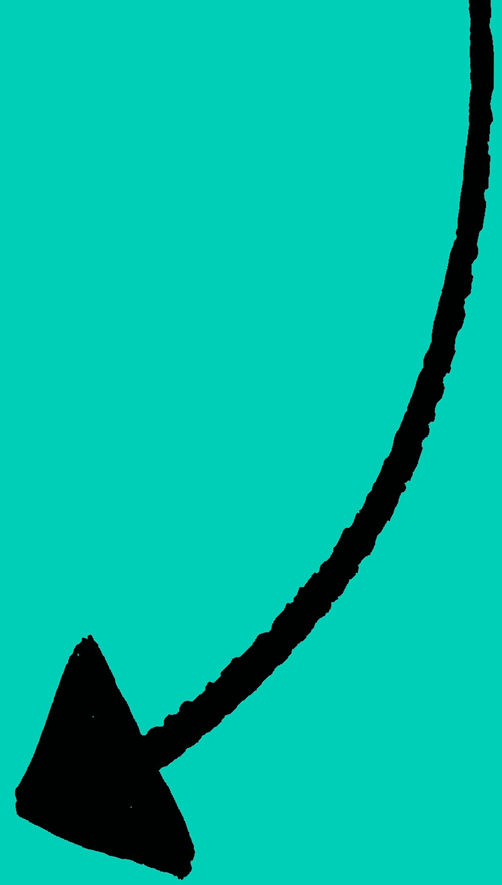
For every 1 GenAI referral, there are 125 direct searches,

Videos are critical to discovery and brand-building

Deeper engagement in app, but also rising on web for Shorts.

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Q&A



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State of Web 2026

Discover the latest trends on web, across desktop and mobile.

