



TRKKN Study

AI Assistant vs. Organic Search Traffic: How AI Is Reshaping the Customer Journey

TRKKN is a Google Data Strength Partner



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Examining the Impact of AI Assistant Traffic

This study examines the emergence and growing significance of AI assistant referrals within today's digital ecosystem. As a Google Sales Partner and digital transformation consultancy, TRKKN is committed to understanding the impact of this rapidly evolving technology on our clients and partners—and turning technological innovation into measurable business value.

The analysis draws on an extensive dataset of 100 Google Analytics properties across EMEA to which TRKKN has access. Conducted by TRKKN Italy, the research spans a wide range of sectors, providing a broad perspective on how interactions between consumers and AI are evolving.

From a methodological perspective, it is important to distinguish between findings from the wider EMEA dataset and those specific to **Italy**, which is the **primary focus of this study**. While the EMEA data provides a broader benchmark for technological and market trends, the Italian analysis highlights nuances in local consumer behavior.

These two perspectives should therefore not be viewed interchangeably. Understanding the differences between them is essential to drawing meaningful conclusions and developing more targeted strategic recommendations.

The Study Objectives

This study aims to quantify the impact of AI assistant referrals on online business performance and, ultimately, on the revenue generated through our partners' digital channels.

Against a backdrop of growing AI hype, TRKKN aims to help businesses focus on what truly matters and distinguish genuine business value from passing trends.

At the heart of the study is a comparison between AI assistant referrals and two established digital acquisition channels: Paid and Organic Search with the focus on the latter.

This comparison allows us to assess whether, and to what extent, AI is already today reshaping the customer journey and influencing conversions. In particular, the study explores the concept of "intent compression": the ability of AI assistants to help users research options, compare alternatives, and refine their needs before arriving on a company's website.

Although AI-driven traffic is growing rapidly, Paid Search remained the dominant acquisition channel and the largest source of conversions across the analyzed dataset. For this reason, the study focuses on a direct comparison between AI assistant referrals and Organic Search, where the impact of AI can be evaluated more meaningfully.

+450.6%

higher Conversion Rate from AI referrals than from Organic Search for newer Automotive brands

-49.9%

lower Conversion Rate from AI referrals than from Organic Search in Beauty & Cosmetics

Performance Analysis by Sector and Conversion Objective

The primary metric used in this study is the Conversion Rate (CVR), which is a percentage-based metric that shows how effectively a channel turns visits into a desired action, such as submitting a form or completing a purchase. It is calculated by dividing the total number of conversions by the total number of sessions, or visits, generated by a channel and multiplying the result by 100.

For example, an AI traffic CVR of 5% means that out of every 100 visits originating from that AI, five resulted in the desired conversion. The effectiveness of AI assistant referrals varies significantly depending on the conversion objective and the nature of the customer journey by sector.



Sectors With Focus on Lead Generation

For sectors such as Automotive and Education, lead quality is a key performance indicator. In this context, AI acts as first-line advisor, helping users navigate complex information and reduce information asymmetries before they reach a brand's website.

Education

In the Education sector, AI assistants represent an important step in the information and decision-making journey.

Data indicates that Conversion Rates from AI assistants are often higher than those from Organic Search. One possible explanation is that users interact with AI assistants to research options, compare institutions, and refine their academic choices before arriving on a landing page. By the time they reach the website, their intent may, therefore, be significantly stronger.

Automotive

In the Automotive sector, the data reveals a clear distinction between different types of brands.

Newer automotive brands with a lower level of consumer awareness and a greater need for discovery and information achieve significantly stronger Conversion Rates through AI than their firmly established competitors.

For the newer automotive players, AI assistants can facilitate technical comparisons, product discovery, and decisions such as booking a test drive more effectively than traditional channels.

Sectors with Focus on Online Transactions

In sectors focused primarily on direct online sales, such as Luxury Fashion, Mass Market Fashion, and Beauty & Cosmetics, AI referral Conversion Rates tend to be lower than those observed in the lead generation-focused and information-intensive sectors.

Luxury Fashion vs Mass Market Fashion: The Role of the Funnel

AI assistants currently tend to operate at the top of the conversion funnel, which does not always

translate directly into online retail sales. In Mass Market Fashion, for example, they are frequently used for product discovery, post-purchase support, or questions related to shipping and returns, making AI interactions less likely to result in immediate conversions.

Luxury Fashion shows a slightly different pattern. AI assistant referrals achieve a slightly higher conversion rate than Organic Search (1.13% vs. 0.94%). Our hypothesis is that the higher price points and longer decision-making cycles encourage consumers to use AI assistants as part of their research process. By the time they reach a brand's website, these visitors may have already compared products and evaluated premium features, resulting in slightly stronger purchase intent than visitors arriving via Organic Search.

Preliminary Results: Italy

Data collected in 2025 and 2026 indicate that the adoption of AI is beginning to challenge established digital marketing dynamics in Italy.

Key finding: The data suggests that where information needs are high and customer journeys are complex, AI assistants can reduce decision-making friction and generate highly qualified website traffic.

Our data demonstrates the following CVRs per channel:

Sectors	AI CVR	Organic CVR	Agent vs. Organic
Automotive – New Brand / Low Awareness	8.70%	1.58%	+450.6%
Education	5.24%	2.97%	+76.4%
Luxury Fashion	1.13%	0.94%	+20.2%
Beauty & Cosmetics	2.36%	4.71%	-49.9%
Mass Market Fashion	0.81%	0.97%	-16.5%

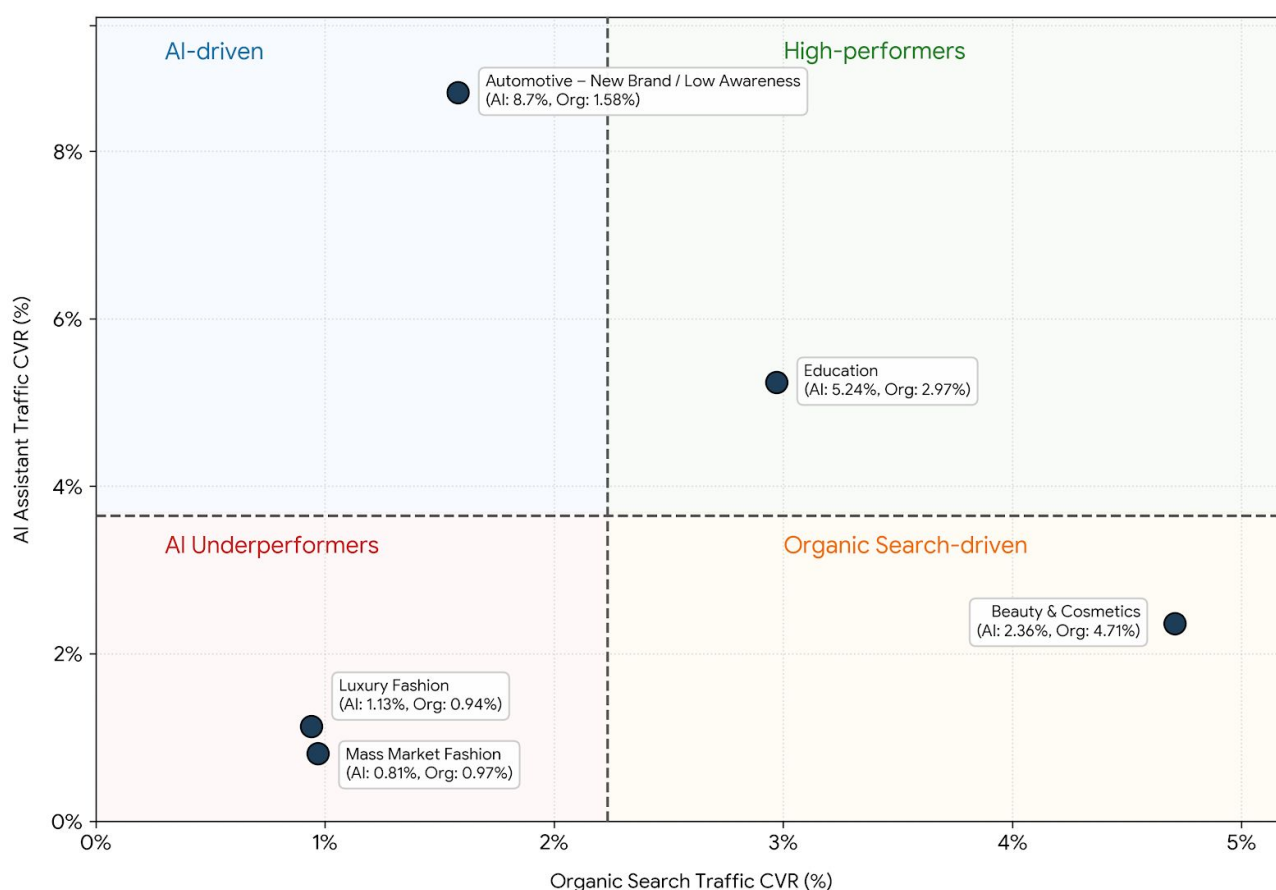


Chart 1: AI Assistant Performance by Sector

Our study positions newer Automotive brands and the Education sector as “AI-driven” and “High-performer”, respectively. In these sectors, AI assistant traffic achieves higher Conversion Rates than Organic Search, suggesting that AI assistants can act as effective “intent compressors” for these information and research-heavy sectors.

Transactional sectors such as Mass Market Fashion and Beauty & Cosmetics, where Organic Search continues to generate higher Conversion Rates, appear in the two lower quadrants. Here, AI assistants currently function primarily as supporting channels within a broader customer journey.

Conversion Effectiveness: AI vs Organic Traffic (by Sector)



TRKKN Insights Blog: How to Measure AI Agents on Your Website With WebMCP



As AI agents begin interacting directly with websites, traditional analytics alone are no longer enough. In this new article, Matthias Borchert explains what WebMCP is, why it matters for the future of Agentic Commerce, and how to measure AI-driven interactions with Google Analytics 4 and Google Tag Manager, so you can keep your reporting accurate while preparing for the next generation of web traffic. [Read more ↗](#)

New AI Assistant Traffic Measurement

Google Analytics (GA) now provides a dedicated way to measure and analyze traffic originating from popular AI assistants.

Businesses can identify how users discover their websites through AI assistants such as ChatGPT, Gemini, and Claude via the new “AI Assistant” channel in the GA Default Channel Group reports.

This update introduces the following changes to traffic source dimensions:

- **Medium:** A new **AI-assistant** value is automatically assigned when the referrer matches a recognized AI assistant.
- **Channel Group:** These visits are categorized under the “**AI Assistant**” channel.
- **Campaign:** Traffic originating from these sources is identified with the campaign name “(ai-assistant)”.

This GA functionality helps businesses understand how Generative AI is influencing website discovery and business performance. Organizations can track user clicks from AI assistants, identify emerging AI traffic sources, and compare AI traffic with established acquisition channels such as Organic Search.

Learn How to Measure AI Traffic Impact

The study seeks to identify partners interested in contributing to the research and helping define emerging market standards and shared best practices.

Today, consumer discovery behavior is changing at an unprecedented speed. With the new “AI Assistant” channel integrated into Google Analytics, you finally have the tools to measure this impact, but only if your data infrastructure is robust.

Don't remain a passive observer as the market evolves. Join the second phase of our research on Data Strength:

- **Assess your readiness level:** Find out if you are already correctly tracking traffic from ChatGPT, Gemini, and Claude.
- **Optimize your CVR:** Understand how to turn AI assistant referrals into predictable and stable conversions.

Contact our team to claim your free GA4 infrastructure check-up:



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