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White Paper

AI Is Already Moving Your Products. Are You Measuring It?

A framework for connecting AI's growing influence on consumer discovery to the revenue you can actually see.

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Key Takeaways

- AI is already driving commerce at scale, and the majority of its impact is arriving through channels that don’t announce themselves.

- Direct AI referral traffic captures only the consumers who clicked through an AI interface to your brand’s own site. For most consumer brands, that’s a fraction of a fraction of actual AI-influenced purchase behavior.

- AI is actively reshaping your branded search volume, retailer performance, and referral traffic at the same time. Most brands are measuring the smallest of the three signals and missing the two that matter most.

- AI recommends products, not brands. What gets your product recommended (or keeps it invisible) is category alignment and trust signal strength at the SKU level, not brand awareness.

- Brands that act now are establishing a compounding advantage. Waiting isn’t neutral; it’s falling behind in a channel growing faster than most marketing teams are tracking.

The Revenue is Already There

Somewhere right now, a consumer is asking an AI assistant which aluminum-free deodorant is best for sensitive skin. She'll get a specific recommendation in seconds, close the app, and search Amazon or Google for the brand or product that was suggested. When she buys it, that sale will register in the brand's analytics as branded organic search. Not AI-influenced. Not AI-attributed. Just organic.

This is happening millions of times a day, across every consumer category. Most brands have no idea how much of their business it's already driving.

Adobe measured 393% year-over-year growth in AI referral traffic to U.S. retail sites in Q1 2026, accelerating to 693% during the 2025 holiday season.[1] McKinsey projects AI-driven search will influence $750 billion in U.S. consumer revenue by 2028.[2] When shoppers do arrive directly through an AI interface, they convert at two to four times the rate of traditional organic visitors, a signal that AI is generating purchase-ready intent, not just curiosity.[3] These aren't projections about where commerce is heading. They're measurements of a channel that's been scaling for two years.

The ground-level picture is equally clarifying. According to SEMrush, the aluminum-free deodorant category alone fields 5.9 million monthly AI searches, with 13% carrying explicit buyer intent, double the buyer intent rate of traditional organic search.[4] Our analysis of that opportunity puts the annual revenue potential at $3.5 million for a single well-positioned product line. One product line. One search category. One realistic market position.

Most consumer brands know AI matters for commerce. Many have started tracking it, though rarely with any systematic rigor. Most have added a referral source to their analytics, pulled an AI traffic report, and called it a capability. The problem isn't awareness or effort; it's that the signal most brands are measuring tells only a fraction of the story. Direct referral traffic from AI interfaces is real, growing, and worth tracking. It's also the smallest part of AI's commercial influence. The rest is already in your analytics, arriving through channels that don't announce themselves.

Understanding where it's actually showing up (and what determines your position within it) is what separates brands capturing this moment from ones that will spend 2026 explaining an attribution gap they don't fully understand.



Why Your Analytics are Missing Most of It

The problem isn't that brands aren't measuring AI. It's that they're measuring the wrong part of it, and the part they're missing is much larger than the part they can see.

What actually happens after an AI assistant recommends a product? In most cases, the consumer doesn't click a link in the response. They close the app, open a browser, and search for the product that was suggested, or go directly to Amazon and look it up. The AI interaction shaped their intent, narrowed their consideration set, and in many cases converted the purchase decision. But none of that appears in your analytics with an AI label attached.

Across multiple independent analyses, somewhere between 40% and 90%+ of searches that surface AI-generated answers end without any click at all, depending on context and platform.[5] Consumers are getting complete, actionable answers, including specific product recommendations, and then completing their purchase journey through channels that carry no AI attribution whatsoever.

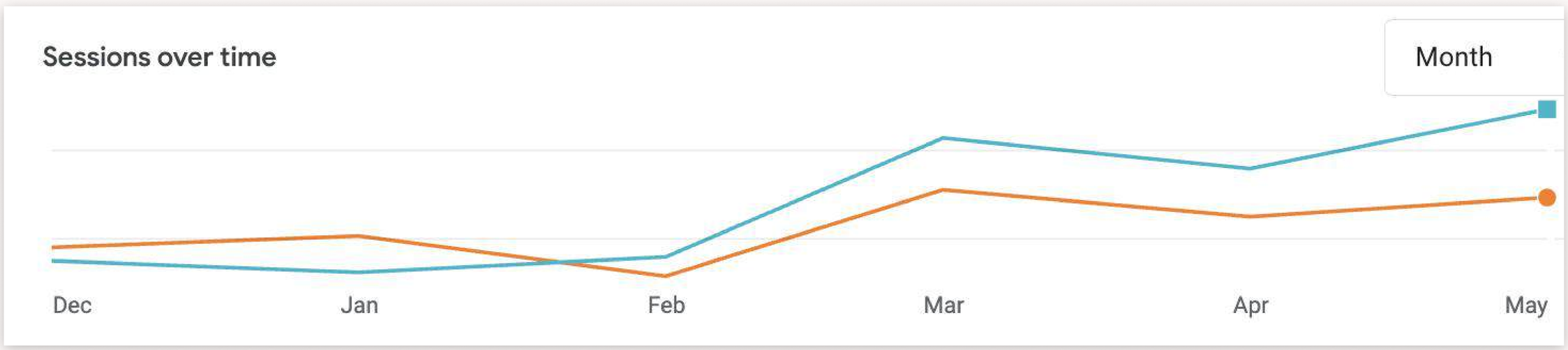
The problem is structural: AI operates outside the customer journey that standard analytics was built to track. Standard analytics was designed for a world where influence and action happen in the same session: you see an ad, you click the ad, the click is attributed. AI breaks that assumption at scale. It operates as an invisible first touchpoint, shaping intent, building preference, and narrowing the consideration set, before a single trackable interaction occurs.

The direct referral traffic that does show up in your GA4 from chatgpt.com or perplexity.ai represents something even narrower than it first appears: not just the shoppers who clicked through an AI interface directly, but specifically the ones who clicked through to your brand's own site, not to Amazon, Target, or whichever retailer they actually buy from. For most consumer brands, that's the smallest possible subset of AI-influenced purchase behavior. It's a fraction of a fraction.[6]

It's the most attributable signal, but it isn't the largest. Not even close.

The organizational data reflects how widespread this gap is: 26% of marketing leaders say they cannot connect AI-driven discovery to conversion at all, and 24% say their analytics stack isn't built to handle AI attribution.[7] But the core problem isn't tooling. Brands that add chatgpt.com to their referral source list and call it an AI measurement strategy have found a clean label for a very small signal, while the larger, messier signal continues to arrive unlabeled.

The good news is that the larger signal is already in your analytics. It's just not labeled as AI.



The Three AI Influence Signals

AI isn't just influencing one part of your customer's path to purchase. It's reshaping all of it simultaneously and unannounced. It's showing up in your branded organic search. It's showing up in your retailer channel data. It's showing up in your referral traffic. The signals are already there; the question is whether you're reading them correctly or attributing them to something else.

There are three signals worth tracking. We call them the Three AI Influence Signals, and they're presented here in order of magnitude (largest to smallest), which is the inverse of how easy they are to attribute. The natural instinct is to prioritize what's clean and labeled. In this context, that instinct produces a systematically distorted picture of AI's actual commercial impact.

Signal 1: Branded Organic Search

When an AI assistant recommends a product, the most common next action isn't a click. It's a search. The consumer opens Google or Amazon and looks up the brand or product they were just told to consider. That journey arrives in your analytics as branded organic traffic: clean, untagged, and indistinguishable from the brand awareness that marketing campaigns generate.

Across the brands we work with, our analysis suggests the majority of measurable AI-influenced discovery arrives through this channel.[8] Most brands are attributing it to something else.

The diagnostic question is straightforward: is your branded organic growth outpacing category-level search trends without a corresponding increase in paid media activity? If your branded search volume is separating positively from category benchmarks, and especially if it's doing so at increasing conversion rates, you're likely seeing AI recommendations showing up in your organic numbers.

We've watched this pattern emerge consistently: a trend line that was flat or tracking the category suddenly inflecting upward following AI optimization work, with no change in paid investment to explain it.

Signal 2: Retailer Channel Performance

Most consumers who receive an AI product recommendation don't complete the purchase on the brand's site. They go to Amazon, Target, Walmart, or wherever they normally shop. AI's most significant commercial impact is the actual conversion to purchase, and it shows up first in retailer channel data, not DTC analytics. For most consumer brands, this is where AI's revenue influence is largest, and where it's least likely to be connected back to AI at all.

The clearest test available is a controlled comparison: identify a set of SKUs where you've made deliberate improvements to product data quality, structured attributes, and off-site content consistency, and compare its retailer channel performance against a comparable set of SKUs where you haven't. AI intelligence tools can measure the lift in recommendation rate, showing which SKUs are being recommended more frequently, in which search contexts, and at what ranking position. The hypothesis to test is whether movement in recommendation rate corresponds to movement in retailer-side traffic and sales. That correlation, where it exists, is your evidence of AI's influence on your retail channels, and the starting point for understanding its magnitude.

This signal is analytically invisible to most teams because retailer data and brand analytics live in separate systems, reviewed in separate meetings, by separate people. The connection to AI influence requires someone to look explicitly across those silos, and most organizations haven't built that bridge yet.

Signal 3: Direct AI Referral

This is the signal most brands are already tracking: traffic arriving with a referring domain of chatgpt.com, perplexity.ai, or claude.ai. It's the cleanest attribution available, which is why it gets the most attention. It is also the smallest of the three signals by a meaningful margin.

The right way to read this signal isn't by volume. It's by quality. AI-referred visitors convert at two to four times the rate of traditional organic traffic.[3] That premium tells you something important about the intent AI recommendation creates: these are not casual browsers. A channel still establishing its volume but already demonstrating this level of conversion quality deserves dedicated tracking, not dismissal because the absolute numbers are small.

One nuance worth understanding: most Gemini referrals (and all of those from AI Overviews, Google's largest AI surface area) don't appear as a distinct AI source in GA4. They surface as organic google.com traffic, which means they're not a separate AI signal at all. They're Signal 1. This matters because the broader market context is working in your favor as a diagnostic tool. Click-through rates from Google search drop by as much as 61% when an AI Overview appears for a query.[9] Which makes the inverse that much more striking: if your Google organic traffic is growing, accelerating, or outpacing your performance in other channels, you're capturing something most brands are losing. In a market defined by declining clicks, an upward trend line is a signal worth investigating rather than writing off as driven by known marketing efforts.

Reading All Three Together

No single signal tells the complete story. Branded organic search confirms AI recommendation is shaping intent at scale, but not whether that intent is converting. Retailer channel divergence confirms it's converting to purchase, but not how the journey started. Direct AI referral conversion quality benchmarks the intent AI creates against other channels, but understates the total volume. Together, they form a coherent picture of AI's actual commercial impact, and it's available to any brand willing to look across its analytics with the right framework.

A brand tracking all three has something genuinely useful: a measurement practice that captures AI's influence where it actually lands, not just where it's easiest to label. But knowing where to look is only half the problem. The other half is understanding what determines your position in the first place.

What Determines Your Position

Knowing where AI's influence shows up in your analytics is the diagnostic half of the problem. The other half is understanding what puts you in a position to capture it, and why the levers that matter are different from the ones most brands are pulling.

The first thing to reframe: AI doesn't recommend brands. It recommends products. And it recommends them as solutions to specific consumer needs. "How is our brand performing in AI?" is the wrong question. The right ones are: which of our products are being recommended, for which consumer needs, and what's driving the gaps? Brand awareness and brand equity still matter, but they don't determine AI recommendation. Product-level data does.

Category alignment: the question most brands aren't asking

Your product data determines which consumer conversations your products compete in. That sounds straightforward, but the implications are less intuitive than they appear. AI systems map products into a semantic space: a vast neighborhood of related queries, attributes, and consumer intents. Wrong or incomplete product data doesn't just reduce recommendation frequency; it places your product in the wrong "neighborhood" entirely, making you invisible in conversations where you should win and present in ones where you're irrelevant.

A personal care brand might be correctly indexed for "sensitive skin moisturizer" but entirely absent from "eczema care," not because the product isn't clinically appropriate, but because the structured data doesn't support that positioning. Novi's research, conducted across 127 CPG categories and 45,000 products using AI shopping assistants, found this kind of misalignment to be consistent and pervasive.[10]

The gap between where brands believe their products are competing and where they're actually showing up is meaningful. It's also correctable.

Trust signal strength: substantiated beats persuasive

AI models don't weight marketing copy the way humans do. They weight substantiation: certifications, third-party reviews, structured attributes that can be cross-referenced across multiple sources. In Novi's research, the combination of verified product attributes and relevant content optimization produced a 62.5% improvement in AI selection rate.[11] That's not a marginal gain from fine-tuning; it's the difference between being recommended and not.

The practical implication cuts against where most brands invest their content energy. A well-written product description on your DTC site matters less than a consistent, attribute-rich product feed that appears accurately across every major retailer, marketplace, and/or third-party site where your product lives. The off-site data layer (reviews, ingredient databases, editorial coverage, retailer feeds) is where AI builds its picture of your product. If that picture is thin, inconsistent, or contradicted by your own site, you're already losing ground.

AI recommendation sets typically surface three to five products. There is no position six. Both category alignment and trust signal levers respond faster to deliberate investment than most brands expect. Together, these two insights make the stakes of inaction concrete: The brands building accurate, consistent, substantiated product data today are securing positions in those sets that will compound as the channel grows. The ones waiting are not holding steady; they're falling behind in a market where the window to establish early position is rapidly closing.

Building the Measurement Bridge

AI is already driving commerce at scale. The three signals exist in your analytics right now. The upstream levers that determine your position are knowable and movable.

What most brands are missing isn't data; it's the framework for connecting what they already have into a coherent picture of AI's commercial impact and the levers they have to grow it.

The starting point doesn't require new tooling or a months-long implementation. Three actions, executable within a week, will tell you more about your AI commerce performance than most brands currently know:

01

Pull your branded organic trend line for the past twelve months and overlay it against category-level search volume and your own direct traffic. If your branded organic is separating positively from the category (especially without a corresponding increase in paid investment) and your own direct trendline, you're likely already seeing AI recommendation influence arriving through Signal 1.

02

Configure GA4 to isolate direct AI referral sources as a distinct channel group: chatgpt.com, perplexity.ai, claude.ai, and copilot.microsoft.com at minimum. Pull conversion rate, session depth, and average order value for each source separately. Volume will be modest; the conversion quality will reframe how you think about the channel.

Gemini is a different problem: its referrals surface as organic google.com traffic, indistinguishable from standard organic sessions in your GA4. There's no reliable segmentation logic that cleanly separates them, which is precisely why the branded organic trend analysis matters. It's not a workaround. It's the actual signal.

03

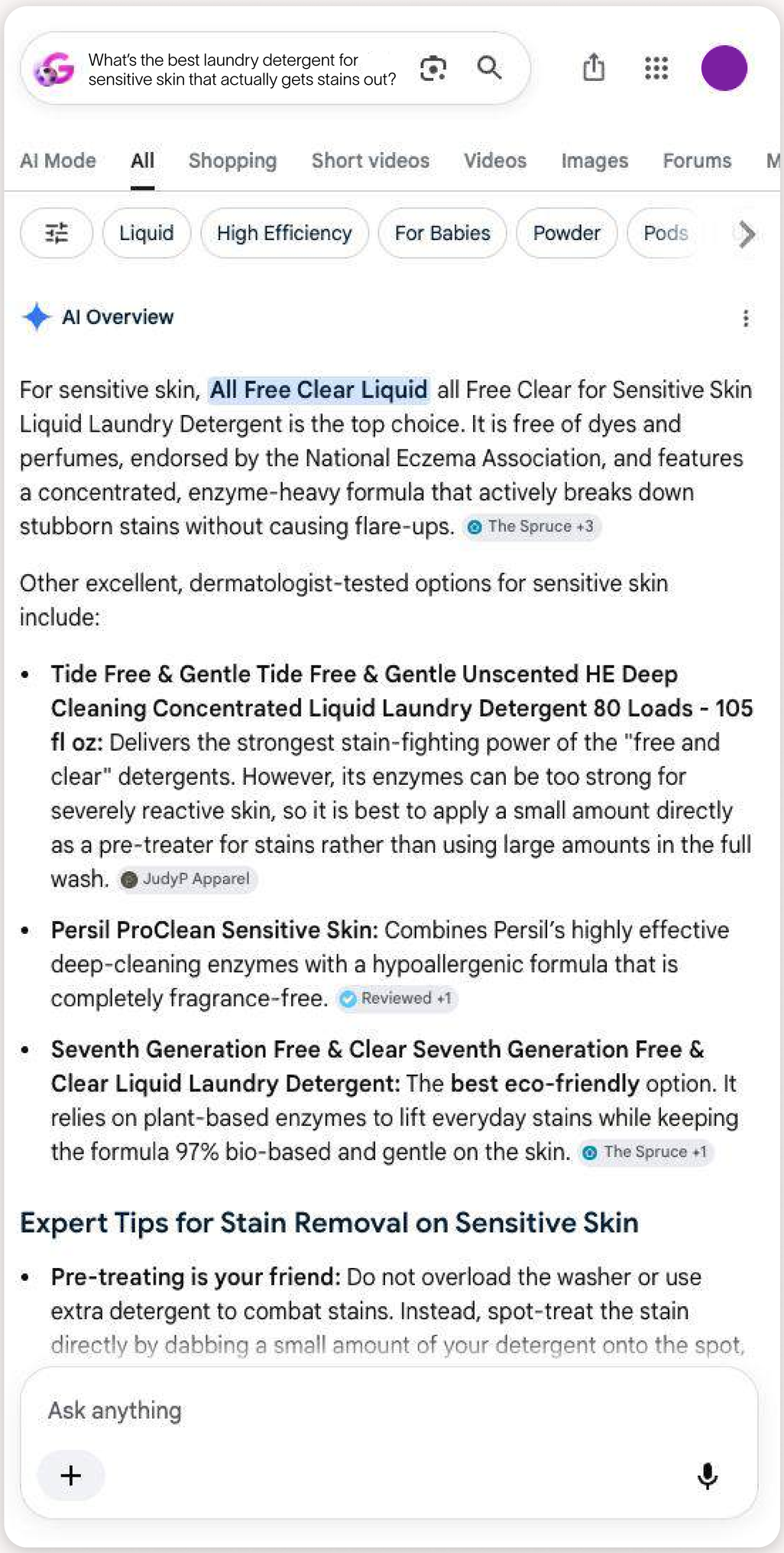
Identify two comparable product lines (similar category, similar price point, similar retail distribution) where one has received deliberate product data investment and one hasn't. Track both through your highest-volume retail account over the next thirty to ninety days. Performance divergence between them is the most direct causal evidence available that AI recommendation is influencing your retail results.

These three steps will tell you more about your AI commerce performance than most brands in your category currently know. Once the signal is visible, the case for building around it makes itself.

The brands pulling ahead aren't doing anything exotic. They're building a multi-pronged measurement practice that recognizes AI as an upstream influence on every channel. They're tracking product-level recommendation tracking across target categories and consumer contexts, reviewing the three signals alongside standard channel metrics, and building a direct feedback loop between product data quality and commercial results. That practice compounds. Every week of data makes the model sharper. Every optimization cycle widens the gap.

The urgency is real. Somewhere right now, a consumer is receiving an AI recommendation that will drive a purchase. The signal from that interaction will arrive in a brand's analytics, probably labeled as branded organic search, probably attributed to something else. The brands that know how to read it will respond to it, optimize for it, and compound the advantage. The ones that don't will keep reporting on a picture of their business that's missing much of what's actually driving it.

The measurement gap is the strategy gap. Closing it starts with knowing where to look.



About the Author



Greg Hollander is COO and Head of Strategy at Novi. He holds a Bachelor's in Economics from the Wharton School at the University of Pennsylvania, and an MBA from Stanford University. Throughout his career, Greg has played a variety of marketing, strategy, sales, and partnership roles driving growth at technology and consumer products companies. At Novi, he leads strategy and delivery across the company's brand partnerships: building AI commerce measurement capabilities, executing against them, and driving the outcomes that follow. The framework and data in this paper come directly from that work.

Get to Know Novi

Novi increases how often your products are recommended and chosen in agentic commerce. We structure and optimize your product data for AI systems and integrate it across leading LLMs, retailers, and marketplaces, so your products show up where consumers are making purchasing decisions.

Learn more at NoviConnect.com

Optimizing how brands structure product data

Optimize product data feed content so AI systems can accurately understand your products.

Amplifying product trust & purchase signals

Surface certifications, claims, and badges that increase credibility and influence AI recommendations.

Expanding digital footprint in places of high authority

Ensure your products appear across the trusted sources AI uses to select and recommend products.

Novi: Drive Product Demand in Agentic Search

Interested in a free Product Ranking assessment? Submit a product to see how you rank and what steps you can take to optimize.

End Notes

1. Adobe Digital Insights, “AI-Driven Traffic Surges Across Industries,” April 2026. business.adobe.com/blog/ai-driven-traffic-surges-across-industries. Also reported: “AI Traffic to US Retailers Jumps 393% in Q1,” TechCrunch, April 16, 2026.

2. McKinsey & Company, “New Front Door to the Internet: Winning in the Age of AI Search,” 2026. mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/new-front-door-to-the-internet-winning-in-the-age-of-ai-search.

3. Multiple independent analyses put AI-referred conversion rates at 2–4x traditional organic. Sources include Microsoft Clarity (3x, across 1,200+ publisher and news sites), Knotch (3.7x site average, 2025), and multiple ecommerce-specific analyses in the 4–5x range. Methodologies and comparison groups vary.

4. SEMrush keyword intent analysis, aluminum-free deodorant category, as of June 2026. Conversion rate range (2.5–4.5%, midpoint 3.5%) and average order value range ($35–$75, midpoint $55) from Gemini’s estimates for a premium deodorant brand. Revenue calculation: 70.8M annual AI queries (5.9M/month × 12) × 13% buyer intent × 20% assumed brand recommendation rate × 3.5% conversion rate × $55 AOV = $3.54M, rounded to $3.5M.

5. Estimates of zero-click rates vary by platform and query context. SparkToro’s 2024 analysis found 58.5% of all U.S. Google searches end without a click; SEMrush’s AI Mode Impact Study found rates of 80–93% in AI-specific search experiences depending on format.

6. Novi analysis of AI assistant responses across CPG categories found that retailer destinations appear as the first referral link in 47% of responses, with retail destinations comprising the majority of all referral links offered. Click-through behavior at the individual link level is not directly measured; Adobe's analysis of AI-referred traffic growth to retail sites (see Note 1) is consistent with the inference that retail captures the majority of actual clicks generated by AI recommendations.

7. Branch, “AI Search and Discovery: Enterprise Benchmark Report,” 2025. branch.io/resources/white-paper/ai-search-and-discovery-enterprise-benchmark-report. Survey of 300 enterprise marketing, growth, and digital leaders.

8. Novi’s analysis across brand partners, 2025–2026. Branded organic attribution to AI-influenced discovery estimated based on controlled comparisons of pre- and post-optimization trend lines against category benchmarks.

9. Seer Interactive, “AIO Impact on Google CTR: September 2025 Update,” November 2025. seerinteractive.com/insights/aio-impact-on-google-ctr-september-2025-update. Study analyzed 3,119 queries across 42 organizations and 25.1 million impressions.

10. Novi research conducted using AI shopping assistants including ChatGPT, analyzing product recommendation behavior across 127 CPG categories and 45,000 products, 2025.

11. Novi research, 2025. Improvement in AI selection rate measured by comparing recommendation frequency before and after optimization of product attributes and trust signal content across matched SKU sets.