

AN OPTIMUM INTELLIGENCE BRIEFING

AI Summaries and the Future of SERP Links

Why AI Overviews, zero-click search and the changing shape of organic results are rewriting how visibility, traffic and demand are won online, and what it means for citation readiness under the OPTIMUM framework

Executive Summary

Search has entered a new phase. Across recent studies, around two-thirds of Google searches now end without a click, and the presence of AI summaries is a major reason why. When an AI Overview appears, users are more likely to get what they need on the results page and less likely to visit a website.

That matters because organic search has always been measured by what it sends to the open web. Once the answer is delivered before the click, the old model of “rank first and expect traffic to follow” becomes much less dependable.

The consequence is not simply fewer visits. It is a change in how intent is intercepted, how brands are discovered, and how value is distributed across the results page. This briefing sets out the evidence, introduces the OPTIMUM framework's model for understanding it, and outlines the practical response for businesses that still want to be found, cited and chosen.

The New Shape of Search

Search is not disappearing, but the way it distributes attention is changing fast. Independent analyses in 2026 show that roughly 65 to 68 per cent of Google searches now end without any click to a website, up from about 60 per cent just two years earlier.

AI summaries, Google's AI Overviews and similar features in other engines, are a key driver of this shift. When an AI Overview is present:

- Click-through rates to websites fall sharply, often by 50 to 60 per cent.
- Even the top organic position loses a meaningful share of its traffic, not just the long tail.
- Informational and commercial research queries, the “what is...”, “how does...”, “best X vs Y” searches that used to feed blog posts, comparison pages and product discovery, are especially exposed.

The pattern is not confined to Google. In experimental AI-only search modes, the share of queries that produce no outbound clicks at all is even higher, as the interface is designed to resolve intent entirely in-platform.

The result is a search ecosystem where visibility and traffic are increasingly decoupled: a brand can be present in the results, yet receive little or no session.

A recent CMA ruling permits publishers to opt out of AI Overviews altogether. Few will. That opt-out simply hands citation share to competitors who stay in, which is a sharper reason to act than the regulatory story on its own.

What the Research Is Showing

The data behind this trend are now consistent across multiple sources:

- Zero-click searches (queries that end without any click) are estimated at 68 per cent of US Google searches in early 2026, up from around 60 per cent in 2024.
- AI Overviews now appear on 20 to 42 per cent of queries, depending on market and dataset.

- When an AI Overview is shown, organic CTRs fall by roughly 60 per cent, and even position 1 can lose around 29 per cent of its previous clicks.
- For informational queries, the zero-click rate has reached around 79 per cent, with AI Overviews triggered on 58 per cent of these searches.
- For commercial investigation queries (“best...”, “X vs Y”), the zero-click rate has risen from 42 to 51 per cent since 2024, and AI Overviews appear on 67 per cent of these queries.

These figures support a clear thesis: AI is systematically intercepting searches that would previously have produced clicks, and doing so at scale.

A Clearer Way to Understand the Trend

Most commentary stops at the phrase “zero-click search”. State of the Art Digital's research takes the analysis further by separating the immediate loss of clicks from the deeper structural change in how search works. This is the model behind two of our published intelligence reports, *Search Doomsday Is Q3 2027* and *The Chaff Effect*, both available free at stevecoulter.co.uk, and it sits at the centre of every OPTIMUM audit we run for clients.

This view of the market has three parts:

1. AI Interception / Zero-Click

This is the first layer: AI summaries absorbing simple informational queries before they ever reach a website. The user's intent is intercepted and resolved on-platform, so the brand may be visible but receives no session. This is already measurable in the rising zero-click rates and falling CTRs described above.

2. Search Doomsday

This is the medium-term systemic risk, set out in full in *Search Doomsday Is Q3 2027*. As AI summaries scale, the pattern of interception becomes so dominant that traditional organic traffic is materially weakened as a channel. The clickstream that has powered SEO, attribution, lookalike audiences and performance marketing begins to decay.

For businesses that rely on consistent organic acquisition, that is not a distant theory; it is to act on now, not then.

3. The Chaff Effect

This is the most original part of the analysis, formalised in the second edition of *The Chaff Effect*, and it is often misunderstood.

This is not the dilution of AI-generated and regenerated and quoted content. That is a separate problem, content pollution, and deserves its own name.

The Chaff Effect is the residual pool of balance and transactional clicks that remains after the simple, easy-to-resolve informational clicks have been removed. In practice:

- AI summaries take the majority of straightforward informational queries, the “what is...”, “how does...”, basic definition and explanation searches.
- What is left is a smaller, more contested pool of more detailed, complicated and less common clicks: deeper research, nuanced comparisons, local and transactional queries, and long-tail decision journeys.
- These remaining clicks are shared around a much larger market of businesses, most of which do not appear in AI summaries at all.

In other words, the Chaff Effect describes the world after AI has taken the “easy” clicks: the leftover demand that still has commercial value, but is now spread thinner across more competitors and harder to capture

with traditional ranking alone. A nightmare scenario for any business where a higher volume of clicks drives the KPIs.

Separately, there is indeed a problem of diluted AI-generated content and citation noise, a kind of content pollution that makes it harder for high-quality sources to stand out. But that is distinct from the Chaff Effect, which is about what remains of the click pool once AI has intercepted the bulk of informational intent.

Why This Matters for Your Business

The practical implication is clear. Traditional SEO remains important, but it is no longer enough to focus on rank alone.

Visibility inside AI summaries, citation in trusted third-party sources, and branded demand all matter more than they used to.

- If a business depends heavily on informational traffic, it is most exposed to AI interception.
- If it depends on balance or transactional traffic, it is competing in the Chaff Effect: a smaller, more contested pool of clicks that still have commercial value.

This is why performance measurement needs to move beyond sessions and rankings. Businesses need to understand:

- Where they appear (AI Overview, organic, local, third-party citations).
- Whether they are cited in AI summaries.
- How much of the remaining demand they can still capture.

Tools such as Semrush and its peers are useful for measuring the size of the citation gap. They are not built to close it. That is the distinction OPTIMUM was built around: a seven-dimension audit framework, covering Technical Foundation, Content Quality and E-E-A-T, Entity and Brand Clarity, Topical Authority, Trust and Credibility Signals, Structured Data and Machine Readability, and Local and Contextual Relevance, that scores where a business stands now and what closing the gap would achieve.

The Strategic Response

Winning in this environment means shifting from “rank and hope” to “be cited, be trusted, be chosen”. A practical agenda includes:

- Build content that is authoritative enough to be cited, not merely indexed. Clear structure, strong evidence, and genuine expertise matter more than ever.
- Strengthen entity signals, structured data and brand clarity so AI systems understand who you are, what you offer, and why you are credible.
- Prioritise the queries that still generate meaningful commercial demand, especially those that are more detailed, specific and decision-led, the clicks that live in the Chaff Effect rather than the intercepted informational layer.
- Measure visibility across AI summaries, not just classical blue-link rankings. Track appearance in AI Overviews, citation frequency, and branded search as leading indicators.

In practice, this is what an OPTIMUM audit and a citation-cluster sitemap architecture are designed to deliver: a structural map of where a business can still be cited once the easy clicks have gone, built and monitored dimension by dimension rather than left to chance.

Closing Note

Search is not disappearing, but the way it distributes attention is changing fast. Businesses that understand AI summaries early will be better placed to keep visibility, protect demand and win the clicks that still matter.

That is why this is more than a technical SEO story. It is a strategic shift in how brands are discovered, compared and chosen. And it is why working with someone who has a clear, research-backed model, AI Interception, Search Doomsday and the Chaff Effect, is an advantage, not a luxury.

For the full published research behind this briefing, including [The Chaff Effect \(Second Edition\)](#), [Search Doomsday Is Q3 2027](#), and [Your Business Is Becoming Invisible](#), visit stevecoulter.co.uk. For a citation-readiness audit of your own site under the OPTIMUM framework, contact Steve Coulter at steve@stevecoulter.co.uk or +44 (0)7407 038877.

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