AI Overview Publisher Research Study - Brazil

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To: Ajor - Associação de Jornalismo Digital & Foxglove

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Background:

This study researched a representative set of keyword phrases that consumers search for in Google.com.br and that generate visits to Brazilian national and regional and local publisher websites.

For each keyword the Google SERP (Search Engine Results Page) was analysed to understand the presence and prominence of Google's generative search results feature called 'AI Overviews' (AIO).

This analysis then used generally accepted industry-wide methods for estimating the impact of the AIO SERP feature on traffic to publishers' websites.

1.0 Summary of Findings

- 35.3% AI Overview (AIO) penetration rate
- AI Overview penetration rate varied by category, for example no AI Overviews were observed in the 'Esportes' category (5% penetration) to a high penetration rate of 70.6% in the 'Mídia e Tecnologia' category
- The average pixel drop was 546 pixels down the page when an AI overview was expanded, which is equivalent to 50.6% of the desktop viewport. This varied by category. The low side 'Apresentadores/Jornalistas' was 34.3% (a 343-pixel drop), on the higher side 'Saúde' was 65.6% (a drop of 708 pixels down the page)

2.0 Methodology

A curated list of 5,023 popular and current keyword phrases was collected from several publishers in Brazil. The keywords were classified using a mixture of AI and human editing and were split into the following categories:

Table 1 – Keyword Classification and Description

Category	**#Keywords**	**Description (pt-br)**	**Description (en)**
Apresentadores/Jornalistas	100	Palavras relacionadas a jornalistas, âncoras de TV, repórteres e apresentadores de programas de notícias ou entretenimento.	Keywords related to journalists, TV anchors, reporters, and hosts of news or entertainment shows.
Celebridades	546	Palavras associadas a pessoas famosas do mundo da música, cinema, TV ou influenciadores digitais.	Keywords associated with famous people from music, film, TV, or digital influencers.
Comida/Receitas	67	Palavras que descrevem alimentos, bebidas, ingredientes, modos de preparo e receitas.	Keywords describing foods, drinks, ingredients, preparation methods, and recipes.
Compras	37	Termos relacionados a compras, produtos, promoções e consumo.	Terms related to shopping, products, promotions, and consumer activity.
Diversos	1,330	Palavras variadas que não se encaixam claramente em outras categorias.	Miscellaneous keywords that do not clearly fit in other categories.

Esportes	280	Palavras relacionadas a esportes, times, atletas e competições.	Keywords related to sports, teams, athletes, and competitions.
Eventos	190	Palavras relacionadas a eventos culturais, políticos, musicais ou sociais.	Keywords related to cultural, political, musical, or social events.
Filmes/Programas de TV	276	Palavras relacionadas a filmes, séries, novelas e programas de TV.	Keywords related to films, series, soap operas, and TV shows.
Fofocas de Celebridades	240	Palavras relacionadas a rumores, escândalos e vida pessoal de celebridades.	Keywords related to rumours, scandals, and the personal lives of celebrities.
Horóscopos	82	Palavras relacionadas a signos, astrologia e previsões astrológicas.	Keywords related to zodiac signs, astrology, and astrological predictions.
Localizações Geográficas	364	Palavras que mencionam cidades, estados, países ou regiões.	Keywords mentioning cities, states, countries, or regions.
Mídia e Tecnologia	187	Palavras associadas à tecnologia, internet, redes sociais e inovação digital.	Keywords associated with technology, the internet, social media, and digital innovation.

Mídia/Publicações	75	Palavras relacionadas a jornais, revistas, sites e veículos de comunicação.	Keywords related to newspapers, magazines, websites, and media outlets.
Notícias Específicas Antigas	53	Palavras relacionadas a acontecimentos noticiosos de anos anteriores.	Keywords related to news events from previous years.
Notícias Específicas Atuais	555	Palavras associadas a eventos noticiosos recentes e tópicos do momento.	Keywords associated with recent news events and current affairs.
Notícias Genéricas	96	Palavras que representam notícias em geral sem foco em um evento específico.	Keywords representing general news without focus on a specific event.
Notícias Locais/Regionais	234	Palavras relacionadas a notícias específicas de uma cidade ou região.	Keywords related to news specific to a city or region.
Organizações/Marcas	101	Palavras relacionadas a empresas, instituições, ONGs e marcas comerciais.	Keywords related to companies, institutions, NGOs, and commercial brands.
Relacionamentos	14	Palavras sobre relacionamentos amorosos, amizades, casamentos e separações.	Keywords about romantic relationships, friendships, marriages, and breakups.

Saúde	196	Palavras relacionadas a doenças, tratamentos, medicamentos e bem-estar.	Keywords related to diseases, treatments, medicines, and wellness.
ALL Categories	**5,023**		

The full list of keyword phrases is in the attached keyword_data.xls file.

These categories reflect a diverse array of types of queries around the different topics where consumers seek information from leading publishers in the region and are similar to the categories we have used in our research in other markets like the UK and US.

We then used an automated desktop PC browser to collect data from Google.com.br with the language set to BR-PT and the location set to different locations in Brazil. The data was collected over a 24-hour period on the 5th of November 2025.

We captured the full HTML of each SERP and parsed the elements into JSON format for ease of analysis.

For every query our browser identified whether an AIO was displayed on the SERP (Search Engine Results Page) or not. If an AIO was presented to the user, then the 'Show More' button was clicked to fully expand the AIO section. The expanded AIO section typically pushes the organic and other universal results even further down the page. The x/y coordinate of every element on the page was recorded so we were able to measure how far down the page the expanded AIO pushed the first organic result.

This is useful data, because in the absence of any new specific click-thru data by SERP feature from Google, we can use this to estimate the impact on organic traffic to publishers when AIOs appear for search phrases that have previously been significant drivers of organic traffic.

We used customised automated code to analyse the SERP response data and then a set of calculations, as set out below, using generally accepted industry practices to estimate the impact that AIOs are having on click-thru rates to publisher websites overall and by category.

3.0 Research Findings

3.1 AIO Penetration %

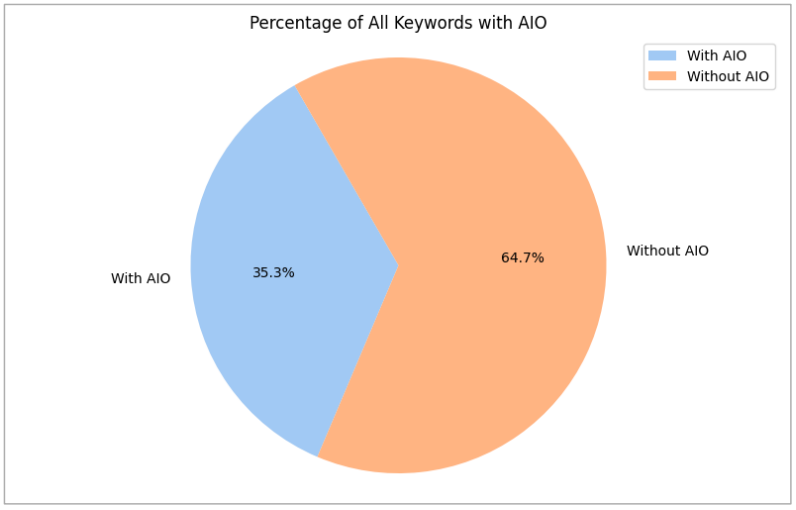

Figure 1 – Percentage of all keywords with AIOs

Figure 1 above shows that Google returned AIOs for 35.3% of all keywords.

This varies considerably by category see Figure 2, e.g. 'Esportes' and Apresentadores/Jornalistas' keywords currently have low levels of AIO penetration at 5.0% and 6.0% respectively, whereas other categories like 'Mídia e Tecnologia' and 'Horóscopos' have high levels of AIO penetration at 70.6% and 57.3% respectively.

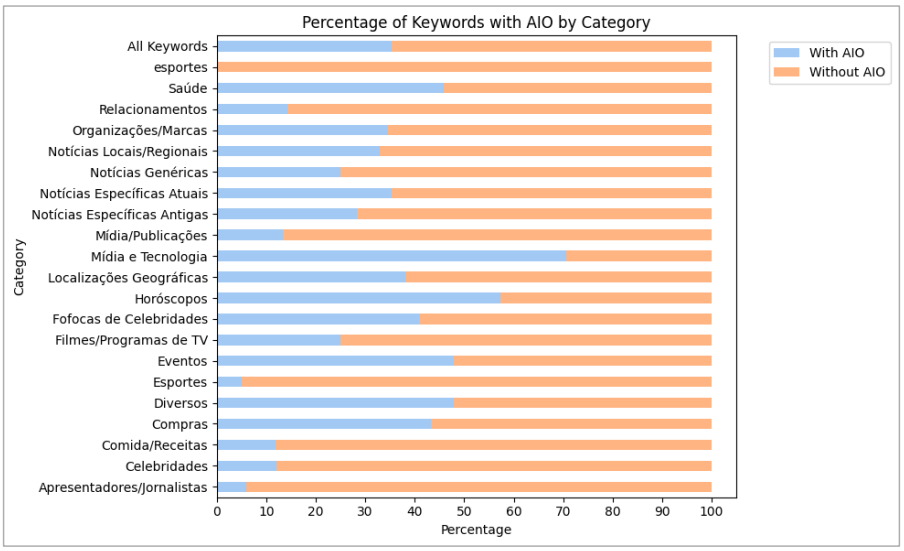

Figure 2 – Percentage of all keywords with AIOs by Category

The following table shows AIO penetration by category:

Table 2 – AIO Penetration by Category

Category	**#Keywords**	**Category AIO Penetration%**
Apresentadores/Jornalistas	100	6.0%
Celebridades	546	12.1%
Comida/Receitas	67	11.9%
Compras	37	43.2%
Diversos	1,330	47.9%
Esportes	280	5.0%
Eventos	190	47.9%
Filmes/Programas de TV	276	25.0%
Fofocas de Celebridades	240	40.8%
Horóscopos	82	57.3%
Localizações Geográficas	364	38.2%
Mídia e Tecnologia	187	70.6%
Mídia/Publicações	75	13.3%
Notícias Específicas Antigas	53	28.3%
Notícias Específicas Atuais	555	35.3%
Notícias Genéricas	96	25.0%

Notícias Locais/Regionais	234	32.9%
Organizações/Marcas	101	34.7%
Relacionamentos	14	14.3%
Saúde	196	45.9%
All	**5,023**	**35.3%**

Of particular interest are the news related categories:

- 'Notícias Específicas Antigas' has a 28.3% AIO penetration
- 'Notícias Específicas Atuais' has a 35.3% AIO penetration
- 'Notícias Genéricas' has a 25.0% AIO penetration
- 'Notícias Locais/Regionais' has a 32.9% AIO penetration

Whether the consumer's queries are generic news queries such as 'news headlines today' or about specific breaking national or regional/local news stories or historical stories, Google has the ability to return a summarised AI Overview, it does so in around a third of instances and in many cases the AIO can satisfy a user's need, negating the need to click through to the original source of the story.

Having conducted over 50 public and private studies of Google's SGE (Search Generative Experience (Beta Version and predecessor to AIOs) and AI Overviews) this is what was expected. Once a news story has been on the web for a very short period of time, it seems very likely that it is a candidate to be summarised by an AIO.

3.2 Top Organic Ranking Page Pixel Drop when AIOs appear

All Keywords - On average the top ranked organic result was pushed 546 pixels lower down the page when an AIO appeared.

This varies by category (see Figure 3 below), e.g. 'Saúde' and 'Mídia e Tecnologia' were the two categories most severely impacted by the rate of AIO occurrences and the size of the expanded AIO pushing the results down the page. For 'Saúde' the average top ranked organic result was pushed 708 pixels lower down the page in the 45.9% of instances where AIOs appeared and for 'Mídia e Tecnologia' the average top ranked organic result was pushed 659 pixels lower down the page in the 70.6% of instances where AIOs appeared for search phrases in this category.

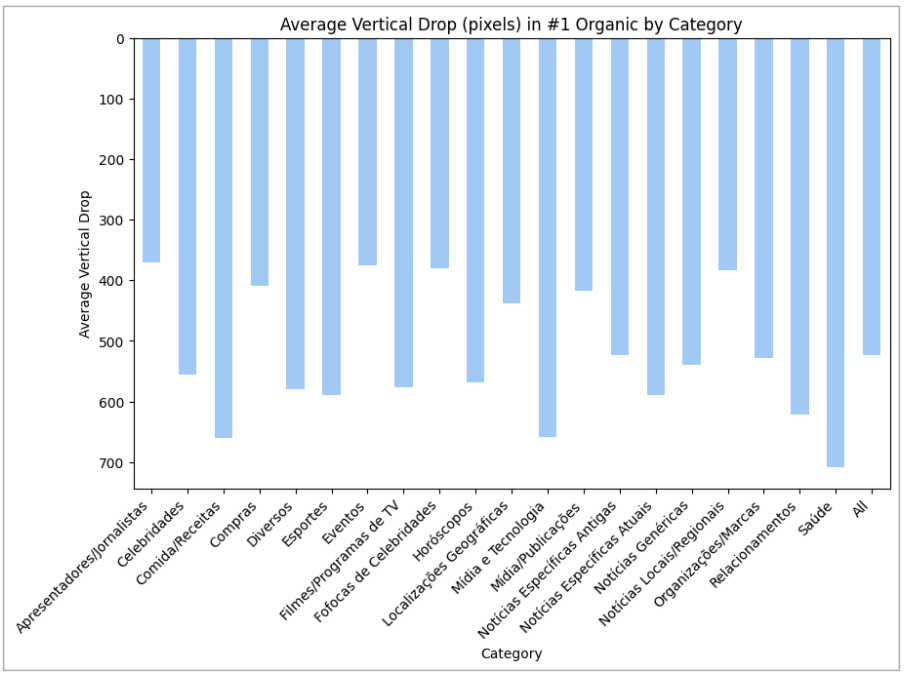

Figure 3 – Average drop in pixels of #1 ranking organic URL by category

A typical desktop browser viewport is 1,080 pixels high (including header and footer bars), so pixel drops of this magnitude are the equivalent of 50.5% of the height of a page (so half a page scroll) for all keywords, and 65.6% and 61.0% for 'Saúde' and 'Mídia e Tecnologia' (so nearly two-thirds of the page).

Table 3 – Average drop in pixels and page depth of #1 ranking organic URL by category

Category	#Keywords	#1 Organic AVG Pixel Drop	#1 Organic AVG Page Depth Drop	Category AIO Penetration%
Apresentadores/Jornalistas	100	370	34.3%	6.0%
Celebridades	546	555	51.4%	12.1%
Comida/Receitas	67	660	61.1%	11.9%
Compras	37	410	38.0%	43.2%
Diversos	1,330	579	53.6%	47.9%
Esportes	280	590	54.6%	5.0%
Eventos	190	375	34.7%	47.9%
Filmes/Programas de TV	276	577	53.4%	25.0%

Fofocas de Celebridades	240	380	35.2%	40.8%
Horóscopos	82	569	52.7%	57.3%
Localizações Geográficas	364	438	40.5%	38.2%
Mídia e Tecnologia	187	659	61.0%	70.6%
Mídia/Publicações	75	417	38.6%	13.3%
Notícias Específicas Antigas	53	524	48.5%	28.3%
Notícias Específicas Atuais	555	590	54.6%	35.3%
Notícias Genéricas	96	540	50.0%	25.0%
Notícias Locais/Regionais	234	384	35.6%	32.9%
Organizações/Marcas	101	528	48.9%	34.7%
Relacionamentos	14	621	57.5%	14.3%
Saúde	196	708	65.6%	45.9%
All	**5,023**	**546**	**50.5%**	**35.3%**

3.3 Google shows a more diverse set of publishers in its AIO results

On average 86.7% of the AIO ranking pages do not match the ranking pages in the top 10 organic results (this ranges from 80.8% not matching at Organic Position 1 to 88.9% at Organic Position 10) and again this varies by category.

Table 4 – Match Rates between Top 10 Organic Ranking Pages and AIO Ranking URLs

Organic Rank	Exact Match	Domain Match	No Match	Total Match	Total	Exact Match Percentage	Domain Match Percentage	No Match Percentage
1	686	279	4,057	965	5,022	13.7%	5.6%	80.8%
2	559	220	4,243	779	5,022	11.1%	4.4%	84.5%
3	499	229	4,294	728	5,022	9.9%	4.6%	85.5%
4	448	219	4,355	667	5,022	8.9%	4.4%	86.7%
5	425	211	4,384	636	5,020	8.5%	4.2%	87.3%
6	385	207	4,415	592	5,007	7.7%	4.1%	88.2%
7	402	189	4,316	591	4,907	8.2%	3.9%	88.0%
8	331	162	3,978	493	4,471	7.4%	3.6%	89.0%
9	264	132	2,906	396	3,302	8.0%	4.0%	88.0%
10	119	60	1,433	179	1,612	7.4%	3.7%	88.9%
AVG						9.1%	4.2%	86.7%

This means that in instances where an AIO appears, a publisher can definitely not expect that if it ranks well in organic it will also rank in AIOs.

A second finding here is that when we looked at which domains were the winners in

Google AIOs, Google owned YouTube.com was the dominant domain by a wide margin. So again, unsurprisingly, Google is favouring its own property.

Our research shows that YouTube is the top performing domain in 90% of all categories (18 of 20 categories).

Table 5 – YouTube AIO Ranking Keywords and Domain Rank in Category

Domain	#AIO Rankings	Category	Domain Rank
youtube.com	741	Diversos	1
youtube.com	285	Notícias Específicas Atuais	1
youtube.com	196	Mídia e Tecnologia	1
youtube.com	120	Saúde	1
youtube.com	115	Notícias Locais/Regionais	1
youtube.com	101	Fofocas de Celebridades	1
youtube.com	99	Localizações Geográficas	1
youtube.com	82	Filmes/Programas de TV	1
youtube.com	69	Celebridades	1
youtube.com	37	Notícias Genéricas	1
youtube.com	34	Eventos	3
youtube.com	29	Horóscopos	2
youtube.com	25	Organizações/Marcas	1
youtube.com	23	Compras	1
youtube.com	18	Notícias Específicas Antigas	1
youtube.com	13	Comida/Receitas	1
youtube.com	12	Esportes	1
youtube.com	11	Mídia/Publicações	1
youtube.com	9	Apresentadores/Jornalistas	1
youtube.com	3	Relacionamentos	1

It also shows that YouTube.com ranks for 14.4% of the total number of recorded AIO citations.

Table 6 – Top 10 Performing Domains in AIOs – Share of all AIO Citations

Domain	% of Generative Citations
youtube.com	14.04%
instagram.com	4.89%
pt.wikipedia.org	4.22%
g1.globo.com	2.73%
gov.br	2.59%
cnnbrasil.com.br	2.55%
facebook.com	2.33%
oglobo.globo.com	1.78%

translate.google.com	1.78%

3.4 What does the Study tell us about the Impact of AIOs on Publishers?

Our private client research using client Google Search Console data combined with SERP data, has demonstrated that the click-thru rates on SERPs with AIOs is considerably lower than SERPs without AIOs, and even if a site happens to rank in the top AIO position there is only a minor improvement in clicks and it is still considerably lower than SERPs without AIOs at all.

This is almost certainly due to the 'zero-click' search effect, where the AIO sufficiently summarises the user's request such that he or she does not need to visit the original publisher's site.

This premise is widely accepted in digital marketing circles: https://sparktoro.com/blog/2024-zero-click-search-study-for-every-1000-us-google-searches-only-374-clicks-go-to-the-open-web-in-the-eu-its-360/

Given that Google has so far refused to share detailed data which would allow publishers to assess this themselves, we have to use estimates based on generally accepted industry principals and methods.

1. Firstly, it is a generally accepted principle that items at the top of a list garner more attention and clicks. This is why some small businesses would change their names to 'AAA plumber' or 'AAA taxi' to appear first in their category in their local yellow pages. This is why the SEO industry exists. This is why Google (and most other search engines) shows ads at the top of its SERP pages.

2. Pages that appear towards the top of a SERP page garner a greater share of users' attention and clicks. Our last large scale CTR% study was conducted ~10 years ago, see 'AIO Impact on CTR Calculator.xls' file and https://www.authoritas.com/blog/what-makes-us-click-on-a-serp-result-seo-click-through-rate-study for our findings. There are many other studies that corroborated our findings (also listed on this blog). Google's SERP design and features have changed considerably since, but Google does not provide any kind of breakdown in the Google Search Console Data to help us ascertain to what degree these percentages may have changed at all.

Commented [LO1]: *(If we find a more recent study, we could substitute our CTR% curve by ranking position data used in the estimates below).*

3. Our estimate of the impact of AIOs on click-thru rate and therefore traffic to publishers' sites will be conservative as we have no first party data about the zero-click effect.

4. So, given that we are looking at a set of SERPs results that are representative of keyword phrases consumers in Brazil users use to find Brazilian publisher sites and given that we don't have any specific first-party data to analyse the SERP data in conjunction with, then we have to adopt a very straightforward and conservative estimate of the impact of AIOs on traffic to publishers from Google. This is the step-by-step method we have utilised to estimate the impact:

a) Use our researched CTRs at certain pixel drop milestones:

The average desktop organic result is 150 pixels high and there's a 25-pixel gap between organic listings. In total, a drop in ranking position equates to appearing ~200 pixels lower down the page on desktop.
We look at the pixel drop down the page and equate this to a CTR% based on our CTR curve data.

Table 7 – Estimated Click-thru rate by SERP position for Desktop devices

Approx Pixel Drop	Equivalent Position	DESKTOP CTR (%)
0px (no drop)	1st position	21.4%
200px	2nd position	14.5%
400px	3rd position	10.9%
600px	4th position	8.2%
800px	5th position	6.6%

b) Linearly interpolate between the known pixel drops

If the average pixel drop (e.g. 546 pixels) isn't exactly at a recorded point, we calculate it by interpolating between the two nearest points.

For 546 pixels:

- It's between 400px (10.9% CTR) and 600px (8.2% CTR)

So, we interpolate linearly between these two CTRs:

Weight calculation:

Weight = (546−400) / (600−400) =146 / 200 = 0.73

Then estimate the CTR% for the pixel drop:

CTR_{546px} = 10.9% + (8.2% - 10/9%) × 0.73

= 8.93%

So, we arrive at an estimated CTR of 8.93% after a 546px drop.

This is the average pixel drop across all keywords.

c) **Estimate Click Loss (%) per Affected Keyword (When AIO Appears)**

Original CTR (Position 1) = 21.4%

Dropped CTR (after 546px drop) = 8.93%

Per-Query Click Loss (%) = (CTR original − CTR after AIO) / CTR original × 100

Per-Query Click Loss (%) = ((21.4 – 8.93) / 21.4) x 100 = 58.3%

Meaning: On average for a given query when an AIO appears, a publisher's expected clicks fall by 58.3%.

d) Total Average Impact (%) Across All Keywords

Average Traffic Impact (%) = Per-Query Click Loss (%) × AIO Penetration (%)

Average Traffic Impact (%) = 58.3% x 35.3% = 20.6%

So, in summary, for '**All Keywords' (averaged across all queries)**:

- **Average AIO penetration**: 35.3%
- **Average pixel drop**: 546px - pushes the #1 organic result down the page and reduces estimated CTR% from 21.4% to 8.93%
- **Per-Query Click Loss (when AIO appears)**: 58.3%
- **Average impact across all queries**: (Minimum) **20.6% drop in total traffic**

e) Total Average Impact (%) Across All Keywords in a Category

You can estimate the different impact on each category using the same methodology.

The table below shows the estimated impact across all categories in the study:

Table 8 – Estimated AVG Traffic Impact by Category

Category	#1 Organic AVG Pixel Drop	Interpolated CTR%	Estimated Click Loss	Category AIO Penetration%	AVG Traffic Impact%
Apresentadores/Jornalistas	370	11.44%	46.54%	6.0%	2.8%
Celebridades	555	8.81%	51.46%	12.1%	6.2%
Comida/Receitas	660	7.72%	62.47%	11.9%	7.5%
Compras	410	10.77%	60.36%	43.2%	26.1%
Diversos	579	8.48%	56.89%	47.9%	27.2%
Esportes	590	8.34%	57.90%	5.0%	2.9%
Eventos	375	11.35%	58.84%	47.9%	28.2%
Filmes/Programas de TV	577	8.51%	50.14%	25.0%	12.5%
Fofocas de Celebridades	380	11.26%	63.93%	40.8%	26.1%
Horóscopos	569	8.62%	63.89%	57.3%	36.6%
Localizações Geográficas	438	10.39%	46.96%	38.2%	17.9%
Mídia e Tecnologia	659	7.73%	57.14%	70.6%	40.3%
Mídia/Publicações	417	10.67%	61.05%	13.3%	8.1%
Notícias Específicas Antigas	524	9.23%	60.23%	28.3%	17.0%
Notícias Específicas Atuais	590	8.34%	61.05%	35.3%	21.6%
Notícias Genéricas	540	9.01%	59.73%	25.0%	14.9%
Notícias Locais/Regionais	384	11.19%	49.70%	32.9%	16.4%
Organizações/Marcas	528	9.17%	47.38%	34.7%	16.4%
Relacionamentos	621	8.03%	47.72%	14.3%	6.8%
Saúde	708	7.34%	65.72%	45.9%	30.2%
All	**546**	**8.93%**	**58.28%**	**35.3%**	**20.6%**

4.0 Conclusion

We therefore estimate that the current levels of AIO penetration in Brazil are causing a minimum of 20.6% decline in clicks to publishers' sites from Google compared to the pre-AIO situation.

In some categories with high AIO penetration and large AIO sections, the impact can be seen to be much more significant with traffic drops of over 30%.

Whilst it is beyond the scope of this research to quantify the knock-on impact to publishers' revenues of such dramatic traffic declines, it is undoubtedly going to have an adverse impact on a publisher's current revenues and the outlook is for further declines as Google ramps up AI Overview penetration.

Google's new AI Mode is now also rolling out worldwide. With this implementation of generative AI, Google is answering almost every user question and follow-up question

and if this becomes the default method of user interaction in Google search then the likely adverse impact on publisher traffic and revenues will accelerate.

We recognise that these are only our best estimates using all the available data we have today. Google has a monopoly in Search and a monopoly on all the ingredients needed to calculate the impact on visibility and traffic from its new generative SERP features, such as search volume demand at a keyword level, exact zero-click and click-thru rate data. Reasonable and fair access to transparent data is needed.