

XDW 26

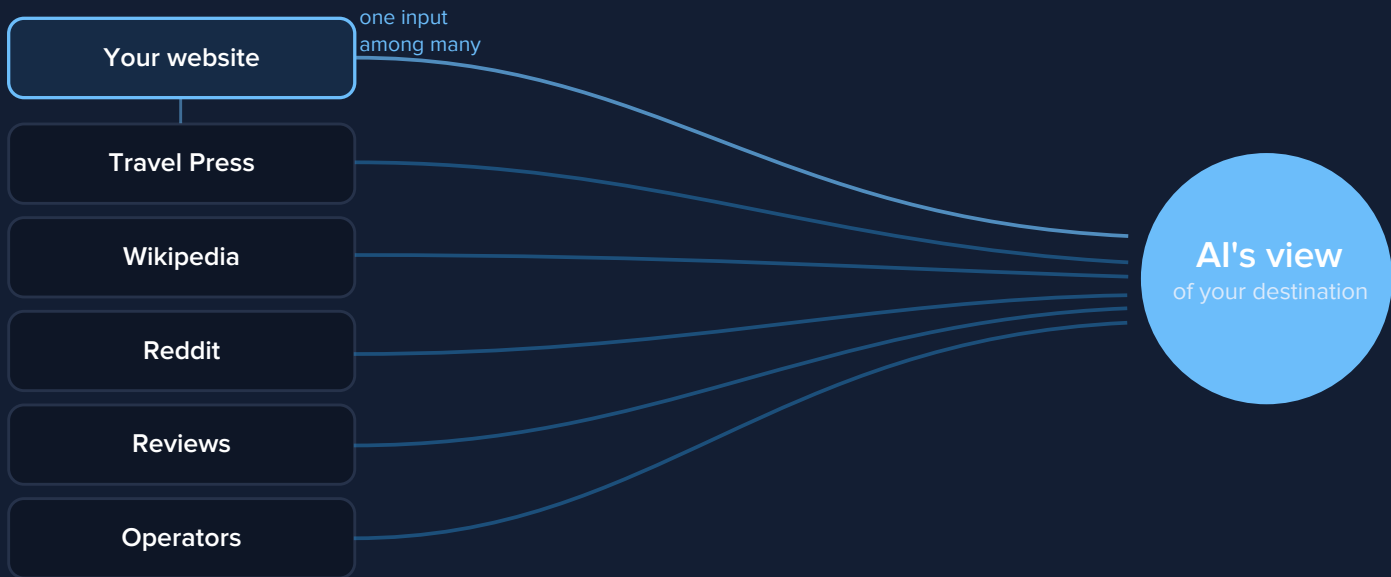
AI DISCOVERABILITY & PRESENCE

Evaluating the **AI**
visibility question.

THE STARTING POINT

AI already has a view of your destination.

It built that view from sources **you do not control**, before you said a word.



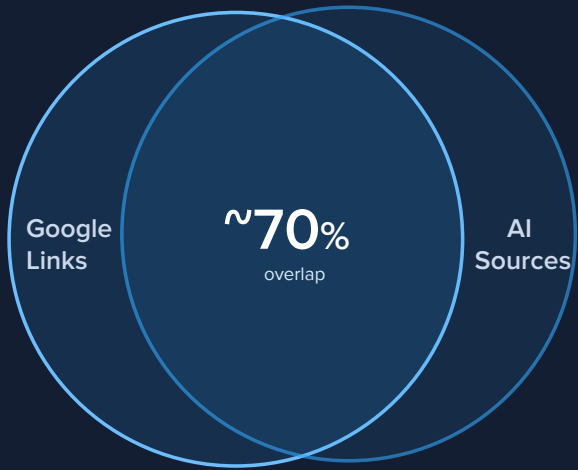
THE BREAK

Ranking on Google no longer means being seen.

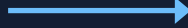
The overlap between the pages Google ranks and the sources AI cites has **fallen from around 70% to below 20%**. SEO success no longer carries into AI answers.

THE BREAK

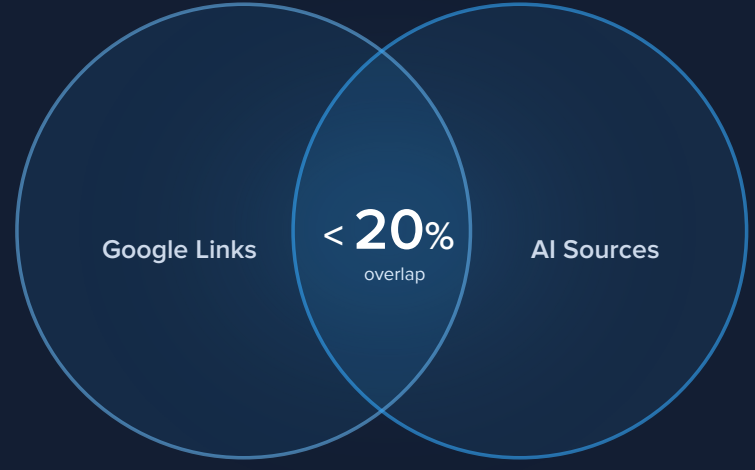
THEN



THE BREAK



NOW



THE MECHANISM

AI trusts what others say about you.

94%

of AI citations go to **earned media and third-party sources**, not brand-owned content. Earned media works because it separates the claim from the claimant.

UNIVERSITY OF TORONTO GEO STUDY, 2025 · MUCK RACK



WHERE AI CITATIONS COME FROM

Earned media

third-party sources, press, reviews

94%

6%

Brand-owned

your own website

Your own website is the weakest lever you have.

01

THE DIAGNOSIS

How AI reads a destination

Three layers of visibility.

The technical layer earns the right to be read. The narrative layer decides what is said. The ecosystem layer is where a destination shapes how AI reads it.

01

Foundational

earning the right to be read at all

02

Narrative

what gets said about the destination

03

Ecosystem

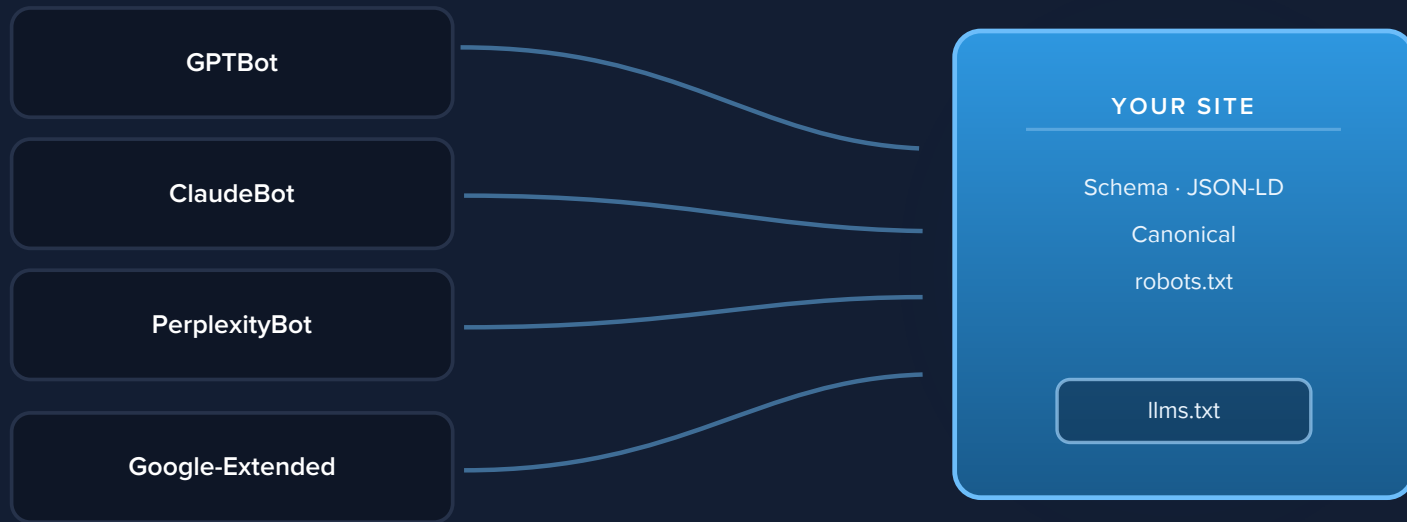
where you accept the story or work to change it

Each layer rests on the previous

Earning the right to be read.

Before AI can cite a destination, it **has to be able to read it**. This is technical SEO, applied to a new set of readers.

THE CRAWLERS · NAMED, ALLOW OR BLOCK



A curated llms.txt index at the site root is becoming standard practice.

The old metrics miss it.

Most AI search is zero-click, so click-based analytics undercount it. **Presence** needs its own measures.

WHAT WE TRACKED

Clicks

Sessions

Keyword rankings

WHAT MATTERS NOW

Share of voice

presence for category prompts

Citation sentiment

and factual accuracy

AI-referred traffic

as its own channel

02

THE CHOICE

Reactive
or proactive

Two ways to work with the model.

REACTIVE

Become legible to the model AI already holds.

THE RISK

Reinforcing existing bias, a permanent catch-up

AI's current views of you

PROACTIVE

Work to reshape the model itself.

Challenge the bias and put an alternative view of the destination forward into the sources AI trusts.

Depth over volume.

Shape the searches that truly matter, rather than chasing all of them. Depth protects authenticity and a consistent brand voice

CHASING EVERY QUERY



thin, diluted

A FEW OWNED NARRATIVES

Signature
landscape

Cultural
Identity

Distinct
Experience

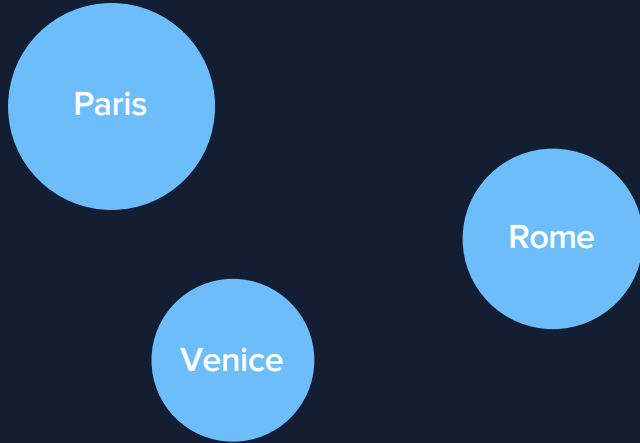
deep, defensible

Consistency scales when the industry shares it.

One voice is self-assertion. Many voices are proof. A documented narrative, repeated across the ecosystem, becomes the corroboration AI needs to surface it.



AI defaults to the places already crowded.



Left to its own model, AI funnels travellers toward the same iconic hubs. Alternatives surface only when someone asks for them.



alternatives, dim unless prompted

The cost of being absent.

When the destination is not in the answer, the gap does not stay empty. Others fill it.

01

Someone else tells your story

Perception, recommendations and brand narrative pass out of your control.

02

SMEs fall behind

Commercial bias pushes small operators behind OTA's and intermediaries.

03

Hallucinations where it matters

False information on safety, accessibility and culture does real harm.

BREAKOUTS AT 11:15

Shape the story or inherit it.

The Strategy Room · The Lab · The Debating Room · The Advisory Clinic

