



AI DISCOVERABILITY & PRESENCE

# Evaluating the AI Visibility Question

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**Nick Hall**

Founder & CEO · Digital Tourism Think Tank

# XDW 26

AI DISCOVERABILITY & PRESENCE

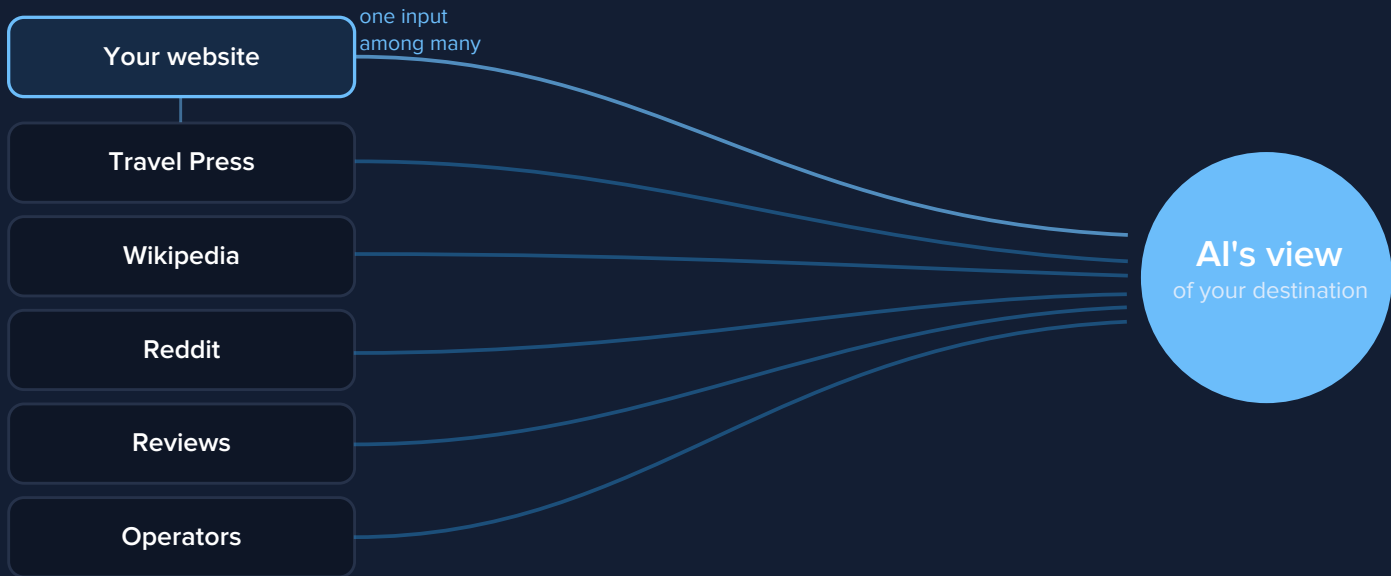
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Evaluating the **AI**  
**visibility question.**

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.



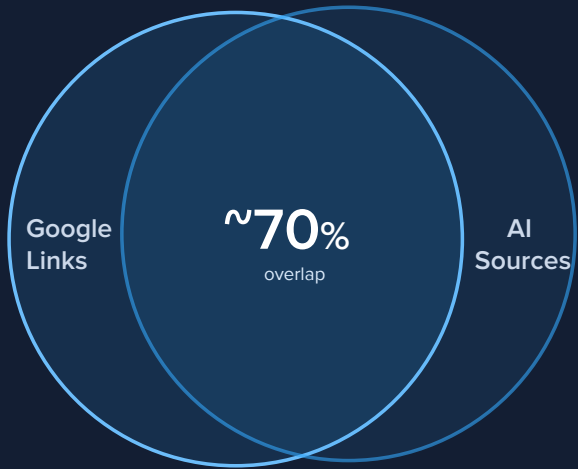
THE BREAK

# Ranking on Google no longer means being seen.

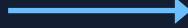
The overlap between the pages Google ranks and the sources AI cites has **fallen from around 70% to below 20%**. SEO success no longer carries into AI answers.

THE BREAK

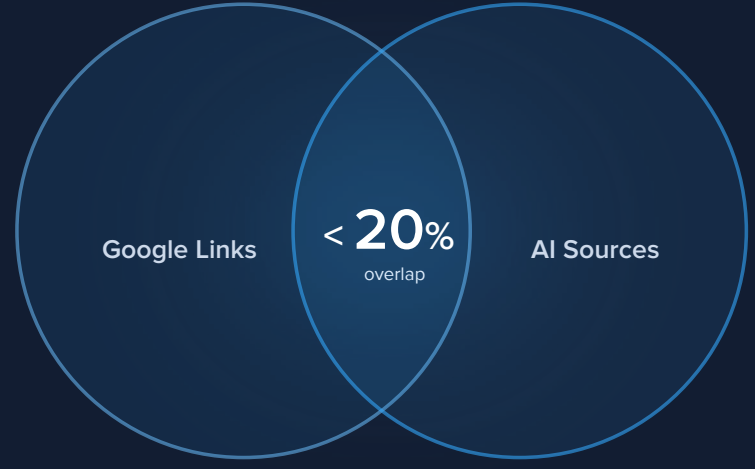
THEN



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

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**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

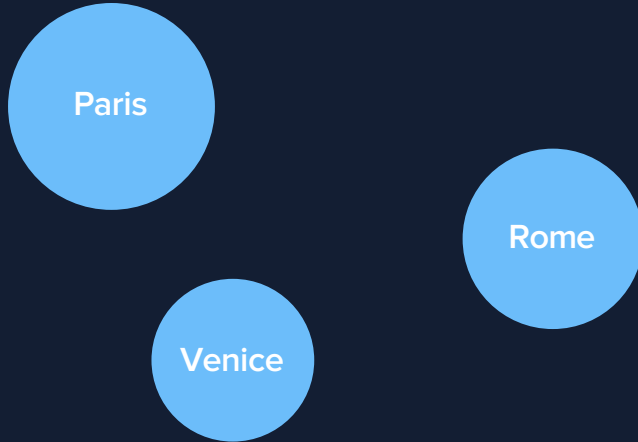
deep, defensible

# 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

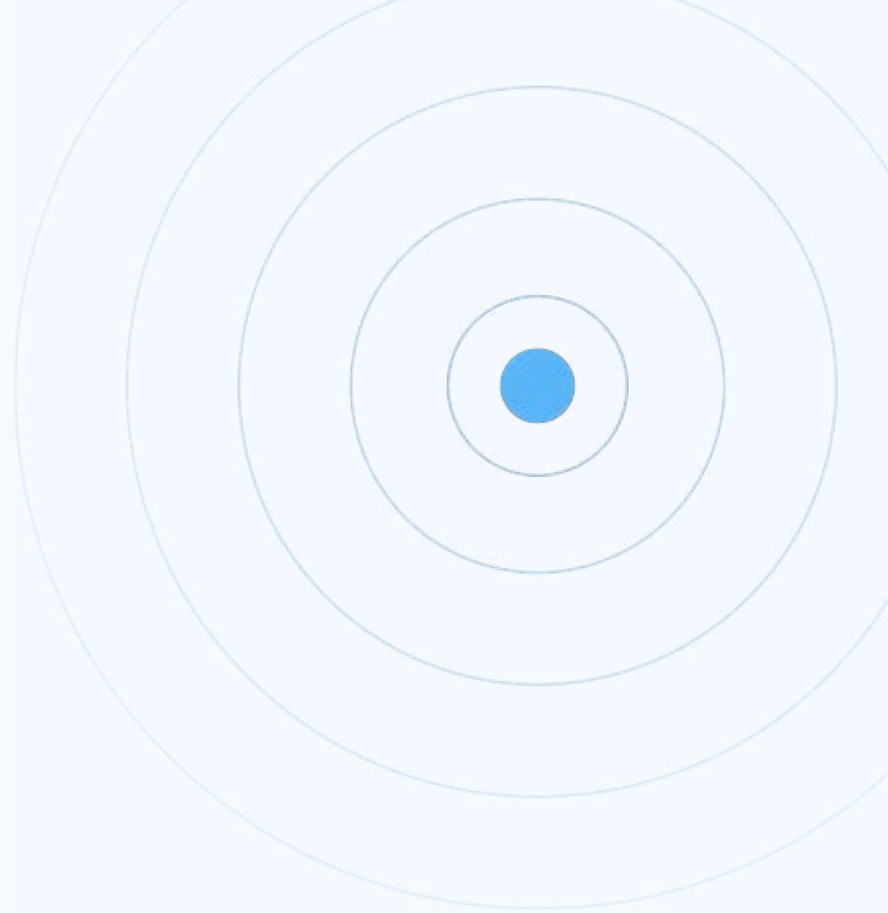
## Hallucinations where it matters

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





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AI DISCOVERABILITY & PRESENCE

# Destination Marketing Without The Map:

## AI and the Future of Destination Visibility

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**Toby Morris**

VP, International Destination Strategy · Tiki

# Destination Marketing Without the Map:

Leading Communities Through AI Disruption

# Who am I?



**Toby Morris**

VP, International Destination  
Strategy,

Tiki

PROPRIETARY TO TIKI

# Envoy

Introducing the first ad unit  
targeted to Travel Intenders,  
offering Conversational Marketing  
**powered by AI.**



“Google has gotten **10 times** harder to get traffic from over the last 10 years, Open AI is a whole different beast.

In Open AI’s case, it’s **750 times** harder to get traffic than it was from Google just 10 years ago.

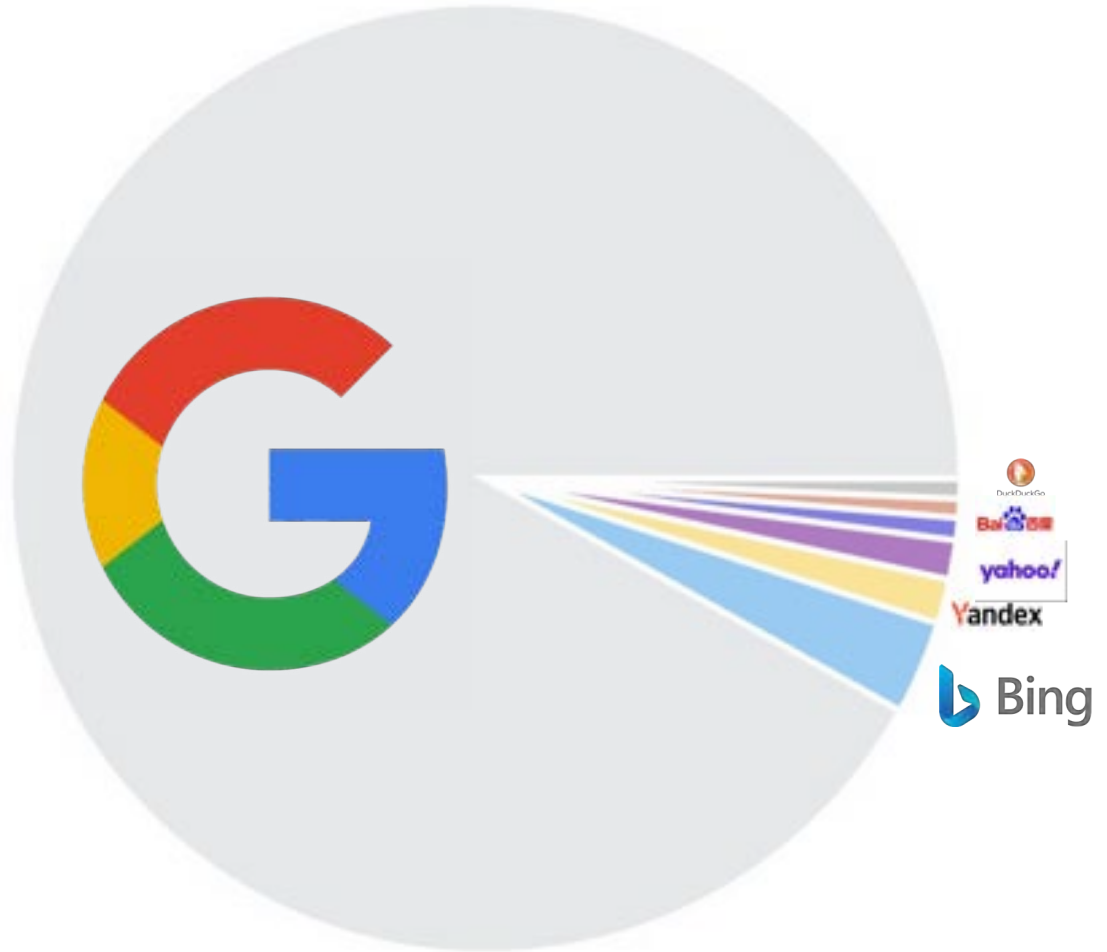
In the case of something like Anthropic, it’s **30.000 times** more difficult to get that traffic.”

*Matthew Prince, Cloudflare*

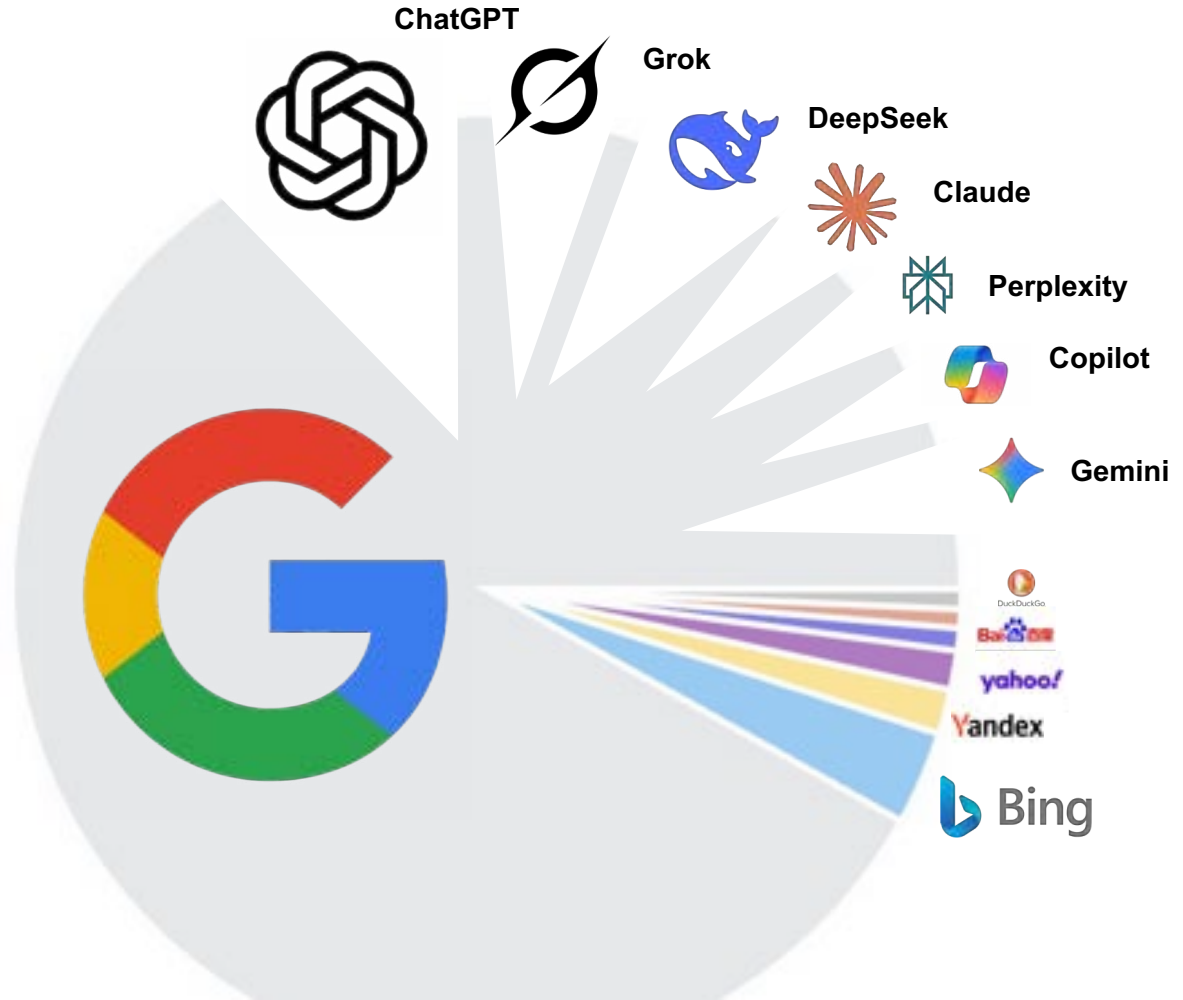


Once upon a time,  
there was only one  
search engine that  
mattered.

*Google.com was (and still is) about  
90% of the global search market share.*



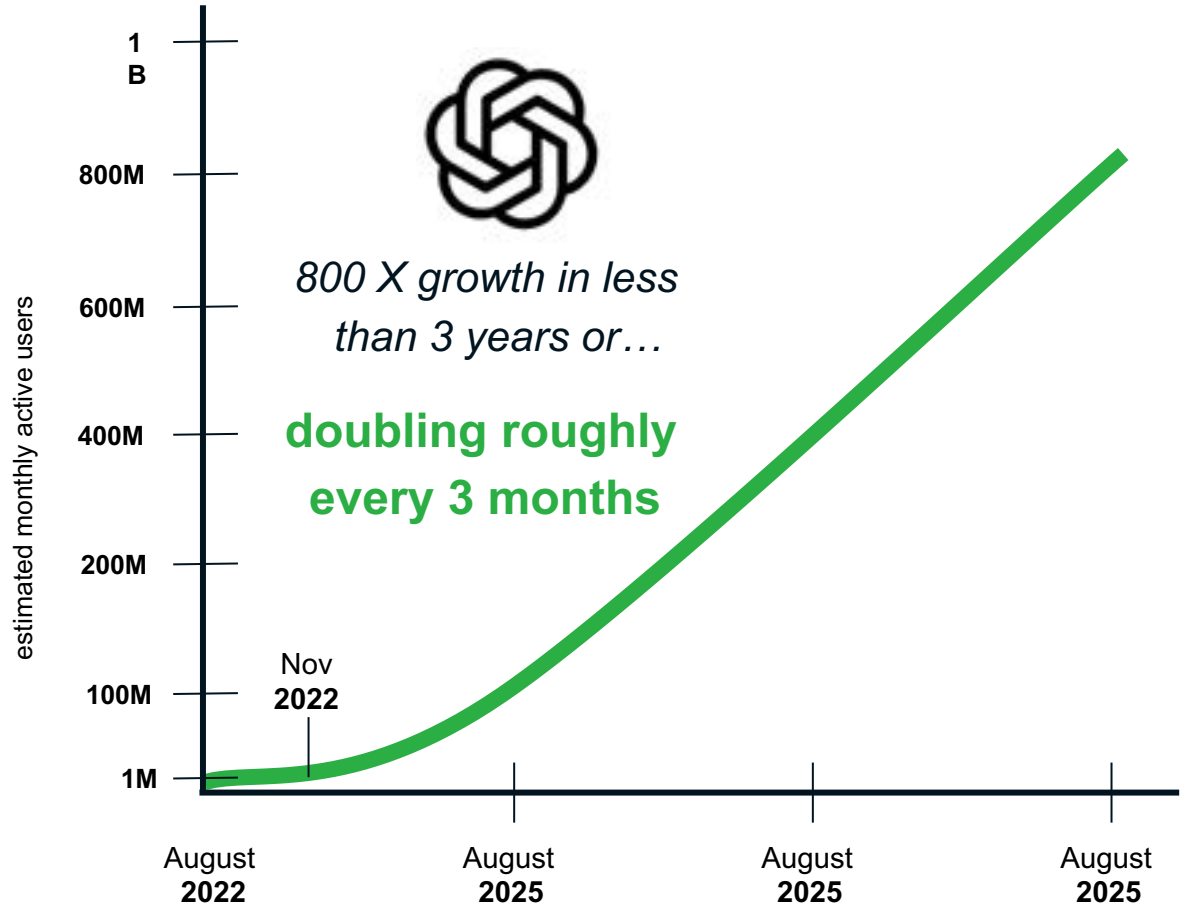
Suddenly there are a **whole bunch of new players** with competitive products that want in.



*And they're growing fast*

ChatGPT's user base is **already about 14% the size of Google's** and has **doubled every 3 months** since 2022.

*It's now the 5th most visited site on the internet.*



A scenic landscape featuring a river with a small waterfall, a person sitting on a bamboo raft, and karst mountains in the background under a dramatic, cloudy sky. The text "So what does this mean?" is overlaid in pink.

So what does this  
mean?

AI Overviews are driving a **30% decrease** in travel site traffic

### Organic Search Traffic to Destination Websites

Impact of Google AI Overviews on DMO website traffic




**1 in 3 destinations** report measurable traffic declines of 20-30% since AI Overviews appeared in search results

# Where's the traffic going?

Well... nowhere.



Most organic traffic is staying on Google, because AI Overviews already already met the user's need.


◆ AI Overview

The best city in New Zealand depends on your travel interests, with top choices including **Queenstown for adventure, Wellington for culture and arts, Rotorua for geothermal activity, Auckland for a cosmopolitan vibe, and Christchurch for a resilient garden city.** Other notable cities are **Dunedin**, known for its wildlife, and **Napier**, famous for its Art Deco architecture. 

Here's a breakdown of what each city offers:

[Show more](#) ▾

9 of the best places to visit in New Zealand - ...  
As you make your way around the country, you'll see...  
 Lonely Planet 

[My 20 Best Places To Visit In New Zealand - Discov...](#)  
28 Jan 2019 — View fullsize.  
smelly steam on White Island... 

# A New Era of Discovery



Generative  
Engine  
Optimisation

*“The practice of structuring and refining content so it's easily understood, trusted, and cited by AI-powered search engines.”*

How do you get  
found in a world  
where **AI designs the  
itinerary?**



# Realign your **content strategy**

## **User-Intent-First Writing**

Write for the question or problem a reader is asking, not just for keywords.

## **Natural-Language Writing**

Favor sentence-length variation, active voice, and colloquial phrasing that mirrors spoken queries.

## **Narrative Structure & Clear Segments**

Use headings (H1-H3), bullet lists, tables, and “step-by-step” sections so the model can extract concise answers.

## **Answer-the-Question Format**

Start sections with a direct, concise answer, then elaborate.

## **Content Types that Feed LLMs**

FAQs, “How-to” guides, comparison tables, and “explain-like-I-am-five” posts are highly trainable.

## **Updated & Authoritative Voices**

Keep facts fresh; link to primary sources or data sets to signal trustworthiness.

## **Understand your built in advantages and disadvantages**

Know how **AI models** answer questions about **your destination.**

Tool	Key Features	Pricing	ChatGPT	Semrush	Ahrefs	Popularity	Flowdr	Meta AI	Englist
<b>Profound</b>	AI search volume insights, brand visibility tracking, technical insights	Custom, book demo	Y	Y	Y	Y	N	N	Y
<b>Semrush</b>	Brand visibility tracking, optimization, journey mapping, data discrepancies	Custom, book demo	Y	Y	Y	Y	Y	Y	N
<b>Pevo</b>	Brand visibility tracking, benchmarking, trend analysis	\$90-\$499/month	Y	Y	Y	Y	Y	N	N
<b>Semrush AI Toolkit</b>	Brand visibility tracking	\$99/month/domain	Y	Y	N	Y	N	N	N
<b>Semrush (Search Engine Targeting)</b>	Keyword based ChatGPT rank tracking	Guru or Business plan only \$249-\$499/mo	Y	N	N	N	N	N	N
<b>Semrush Enterprise AI</b>	Track your brand mentions, sentiment, and competitors in real time	Custom, book demo	Y	Y	Y	Y	N	N	N
<b>Nightwatch</b>	Keyword based ChatGPT rank tracking	\$39-\$699/month+	Y	N	N	N	N	N	N
<b>Otterly</b>	Brand visibility tracking, link monitoring, sentiment	\$29-\$999/month	Y	N	Y	Y	N	N	N
<b>SE Ranking</b>	Track AI Overviews, analyze keyword exposure	Pro or Business plan only \$119-\$299/mo+	N	N	Y	N	N	N	N
<b>Rankscale</b>	Brand visibility tracking, technical insights	Custom, book demo	Y	Y	Y	Y	Y	N	N
<b>Knowable</b>	Brand visibility tracking	Free (ChatGPT only)-\$99/mo	Y	Y	N	Y	Y	N	N
<b>Goodie</b>	Brand visibility tracking, sentiment analysis	Custom, book demo	Y	Y	Y	Y	Y	Y	N
<b>RankRaven</b>	Brand visibility tracking	\$49-\$149	Y	N	N	N	N	N	Y
<b>seoClarity</b>	AI optimization, content audits, search visibility tools	Custom, book demo	Y	Y	Y	Y	N	N	N
<b>Similarweb</b>	Chatbot referral analytics, traffic monitoring	Custom, book demo	N	N	N	N	N	N	N

**BRIGHTEDGE**

**goodie**

**SEMRUSH**

**Profound**

**Otterly.AI**

**rankscale**

**NIGHTWATCH**

What DMOs Can  
Measure Today

**And What's Emerging**

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# Visibility, Authority, **Influence**

## **AI Answer Share**

% of AI generated travel answers where the destination is explicitly referenced or recommended.

## **AI Citation & Attribution Frequency**

How often destination content is cited, linked, or paraphrased by LLMs and AI assistants.

## **Narrative Alignment Score**

Degree to which AI descriptions of the destination match intended brand pillars and messaging.

## **Prompt Coverage Across the Journey**

Presence of the destination across inspiration, planning, comparison, and “where should I go” prompts.

## **Zero Click Influence Index**

Measure of influence exerted in AI responses that shape consideration without driving a site visit.





# Trust, Intent & Demand Creation

## First-Party Intent Signal Growth

Increases in AI driven signals such as conversational queries, planner interactions, and saved trips.

## AI Trust & Authority Score

Frequency the destination is positioned as “recommended,” “best,” or “trusted” by AI systems.

## Content Extractability Rate

Percentage of owned content that is easily parsed, summarized, and reused by LLMs.

## Brand-to-Category Association Strength

How strongly the destination is linked to experiences (culture, food, sustainability, events) in AI outputs.

## AI-Driven Demand Lift

Incremental lift in intent, awareness, or downstream visitation attributed to AI exposure.

## In a Generative Engine Optimization world:

- ❖ Visibility happens **inside answers** not just search results
- ❖ Influence occurs **before a website visit** and often without one
- ❖ Brand strength is built through **consistent narratives AI can understand and reuse**



Let's do great things  
together.

[toby@tiki.com](mailto:toby@tiki.com)

[tiki.com](http://tiki.com)

## 4. Reputation > Rankings

In AI search:

- Being **credible** beats being **optimised**
- Being **quoted** beats being **clickable**
- Being **consistent** beats being **loud**

Strong PR ensures:

- Your organisation is described accurately
- Misconceptions don't dominate the narrative
- Competitors don't define the category for you

# Proving Expertise

- The first-hand experience of the creator
- The expertise of the creator
- The authoritativeness of the creator, the content itself, and their site
- The trustworthiness of the creator

**THE ATTIC ON EIGHTH** ABOUT THE TEAM CATEGORIES CONTACT SEARCH

July 5, 2019 | Rachel Davis

## Coffee Shops of the World: Savannah, Georgia

*The line between a member of The Attic and our coffee is perhaps unparallel. It comforts us and sustains us, and at home nothing gets us going faster in the mornings or brings more easy enjoyment with friends. Traveling, we seek it out religiously, to save us from jet lag and submerge us within the local energy, becoming a home away from home -- a place where we gather with friends or fellow travelers and stop to recharge between nights. In this series, we are sharing our favorite independent coffee shops at home and around the world.*

**the Savannah** AUTHOR

**Six amazing Savannah coffee shops for remote work or studying**

HOME | LATEST POSTS | SIX AMAZING SAVANNAH COFFEE SHOPS FOR REMOTE WORK OR STUDYING

**greentruck**  
15 YEARS! THANK YOU!

**Madame & Cooper**

**MAKE ART**

By Vanessa London (Dixley Nelson)

“Hi there! Happy Monday! This article is all about 4 handpicked Savannah coffee shops

**AVANNAH**

Facebook Twitter Instagram

Support local. Don't just blog on the go. Different. Don't become city for. (Savannah) friends in the community. When visiting Savannah, you can only a wonderful! There's nothing in this for free so that each and every coffee for only the personal benefits, but the

14 historic (average) house? Filled with from an emphasis on both community it only, naturally, but personally, at the accomplished (Savannah) research to it. The only also focus on creating it make the perfect home!

**WHEAT, Y. & BRENNAN**  
WHEELFIELD

Wheat, Brennan,  
Brennan, and  
Brennan Brennan

“Hi! I am sharing to my table and on an afternoon on coffee. As a Catholic, myself, but also have more about photography and that I cannot words for the glory of God. Let me help you with your story!”

**BLOG CATEGORIES**

Campy Deviants 16

Campy Deviant 16

Campy Deviant 16

Cherry Traction 16



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# Destination Marketing Without The Map:

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AI DISCOVERABILITY & PRESENCE

# The Impact of AI on Destination Discoverability

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**Johannes Auer**

Digital Strategy · Oberösterreich Tourismus

**Stewart Howe**

Co-founder · Discover Peterborough

**in  
unserer  
natur!**  
oberösterreich



# First steps



**Next level**

# Gosau Forest



NEWS

ARFICA KUDREN, TRUMIKEN, OM - DINEKLL-10, JPIEDK - R9R ILAN KLSJII VINIS - VE

veo

**No Consistency**



ChatGPT

**in  
unserer  
natur!**  
oberösterreich



ChatGPT

**in  
unserer  
natur!**  
oberösterreich



"A high-resolution digital illustration of a peaceful upper austrian alps in early morning light. The alpine setting features typical austrian vegetation for upper austria. On the right side stands an **anthropomorphic** funny upper austrian buck, dressed like an outdoor field reporter: wearing a padded green vest, a yellow press badge, cargo pants, and holding a small microphone with a yellow circle logo on it. The buck looks into the imaginary camera with a serious but slightly amused expression. The lighting is soft and natural, with mist hanging low among the trees. No humans present. make it aspect ratio 16:9

# Nano Banana



Nano Banana



# Nano Banana



Nano Banana

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oberösterreich

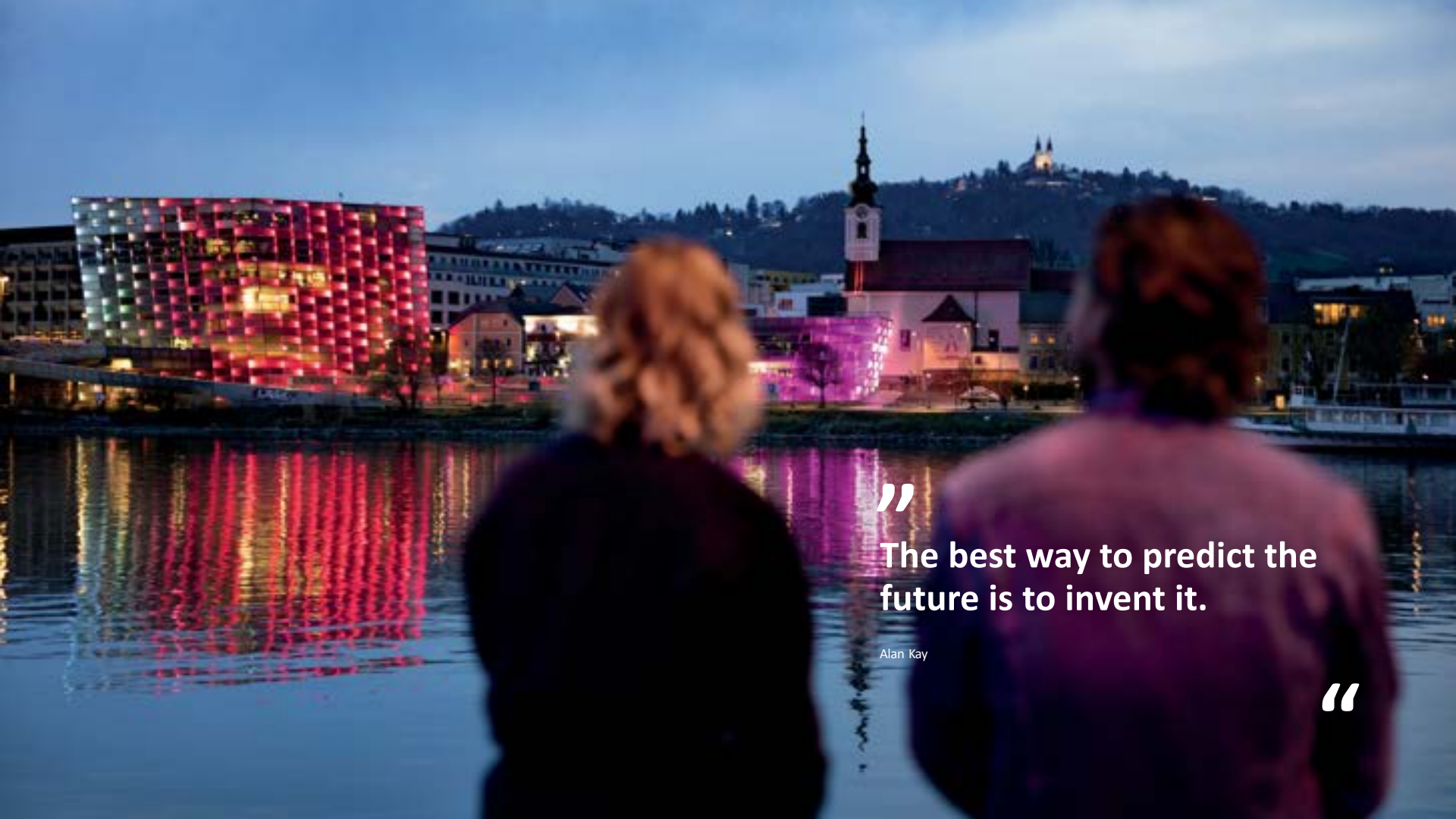


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ober...sch









”

**The best way to predict the future is to invent it.**

Alan Kay

“



AI DISCOVERABILITY & PRESENCE

# The Impact of AI on Destination Discoverability

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Co-founder · Discover Peterborough

X. DESIGN WEEK 2026 • BRUSSELS

# Discover Peterborough



*More Than You Imagine*

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**DISCOVER PETERBOROUGH**

Stewart Howe & Rebecca Jackson



# Dinosaur City

How a small destination team is using AI to compete like a much larger tourism organisation.

- An AI-generated dinosaur character connects real attractions
- Character-led storytelling increased engagement
- Museums, trails, cathedral exhibitions brought to life

# Expanding our idea.

## AI tools used.

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### Google Nano Banana

Artwork & imagery

---

### Kling & Google Veo

Animated promo videos

---

### Claude / Chat GPT

Vibe-coded web pages



# Generative Images

Created using  
Google Nano  
Banana

---







# Discover Peterborough



*More Than You Imagine*



# Fossil Floor Decals

Linked to web pages vibe-coded in Claude

# Discover Peterborough



*More Than You Imagine*



AI DISCOVERABILITY & PRESENCE

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