

A wide-angle photograph of a calm lake at dusk or dawn. In the foreground, a wooden dock extends from the bottom edge towards the center. A small figure of a person stands on the dock. The water is still, reflecting the sky and the distant shoreline. The background shows a line of trees and hills under a soft, hazy sky.

Navigating Change in Tourism Discovery

A Strategic Update from Destination Ontario

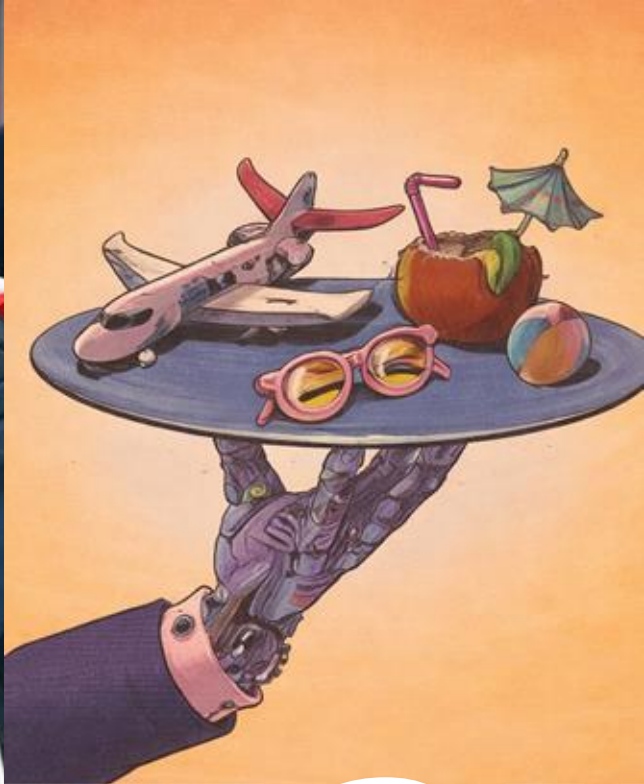
Lauchlan Rogers, CMO, Destination Ontario

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oh, great.
change





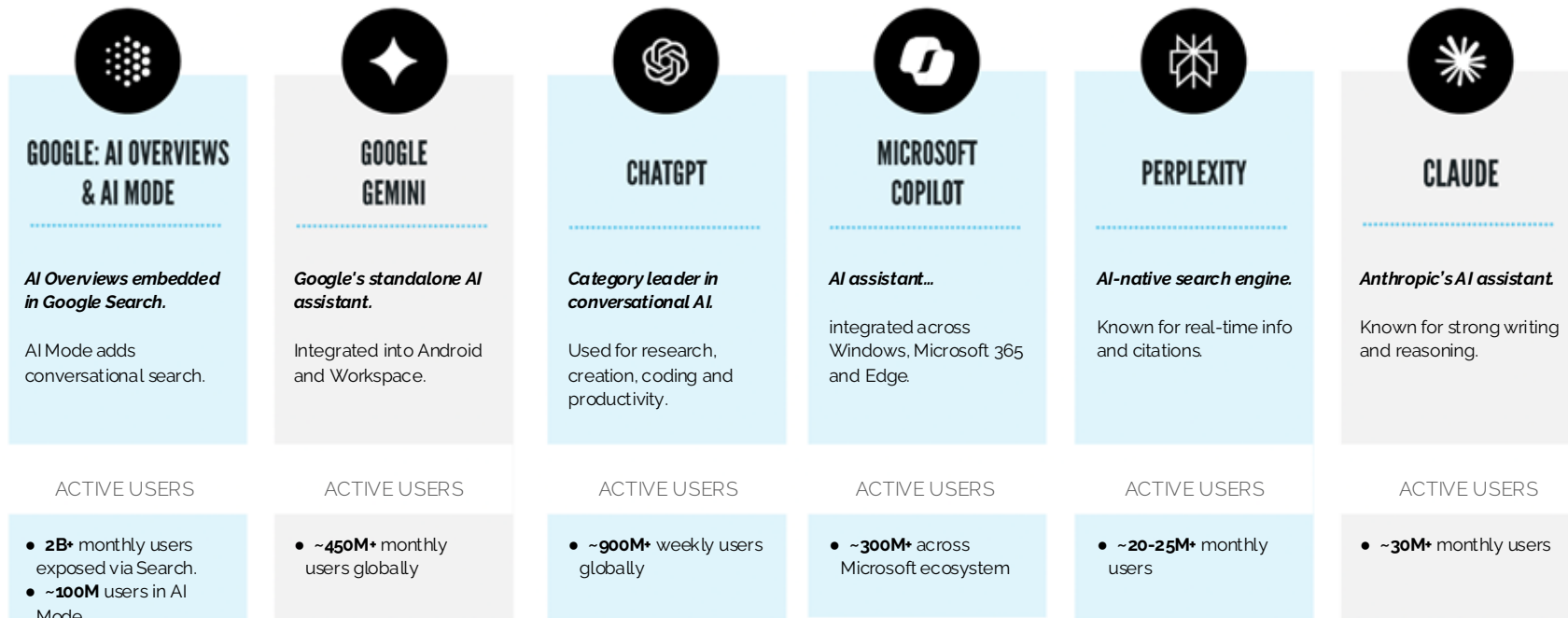
DISRUPTION



The Impact of
Generative
Search *on*
Travel Discovery

THE AI LANDSCAPE IS LAYERED & COMPLEX

Although chatGPT is the dominant tool, we have seen unprecedented growth across all the big players



56%

of consumers **now use** GenAI
tools for recommendations
(up from 25% - 2023)

37%

of travelers reported using
AI tools to assist with **trip
planning**



GOOGLE: AI OVERVIEWS
& AI MODE



GOOGLE
GEMINI



CHATGPT



MICROSOFT
COPILOT



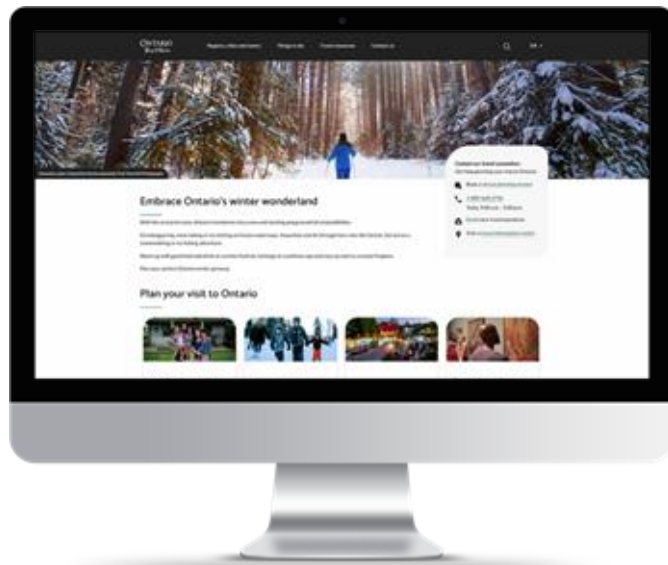
PERPLEXITY



CLAUDE

27%

Decline in total sessions



19%

Decline in **outbound clicks**
(leads/industry referrals)

destinationontario.com



20-60%

Estimated Industry decline
in Organic Web Traffic



THE HARD TRUTH

THERE WILL BE UNEQUAL IMPACT ACROSS THE SECTOR

May Benefit

Websites with
strong
transactional clarity

Websites with
strong content
'authority'

Will See the
biggest impact

Websites focused
on **aggregation &**
business listings



AI IS BEING LAYERED INTO TRADITIONAL SEARCH NOT NECESSARILY PULLING USERS AWAY

AI tools still account for less than 1% of total U.S. desktop activity



Source(s): Google, OpenAI, Jungle Scout, Semrush, Growth Memo, Ripen eCommerce

Google AI Overviews

Where should I go for lunch in mississauga after a speaking engagement near the airport

AI Overview

For a post-speaking engagement lunch near Toronto Pearson Airport in Mississauga, top options include the highly-rated Peter's on Eglinton for classic comfort food, [ZET'S Restaurant](#) for quick, quality Greek-Canadian fare, or [Rick's Good Eats](#) for unique Punjabi fusion. [TikTok +1](#)

Here are top recommendations categorized for convenience:

- **Closest to International Centre/Airport:** Peter's on Eglinton (Casual, Greek/Steak), ZET'S Restaurant (Quick, burgers/souvlaki), or Pearson Pub.
- **Unique/Local Favorites:** Rick's Good Eats (Fusion), [Bamiyan Kabob](#) (Afghan), or Pho Ngoc Yen (Vietnamese).

[Show more](#)

2:14 50+

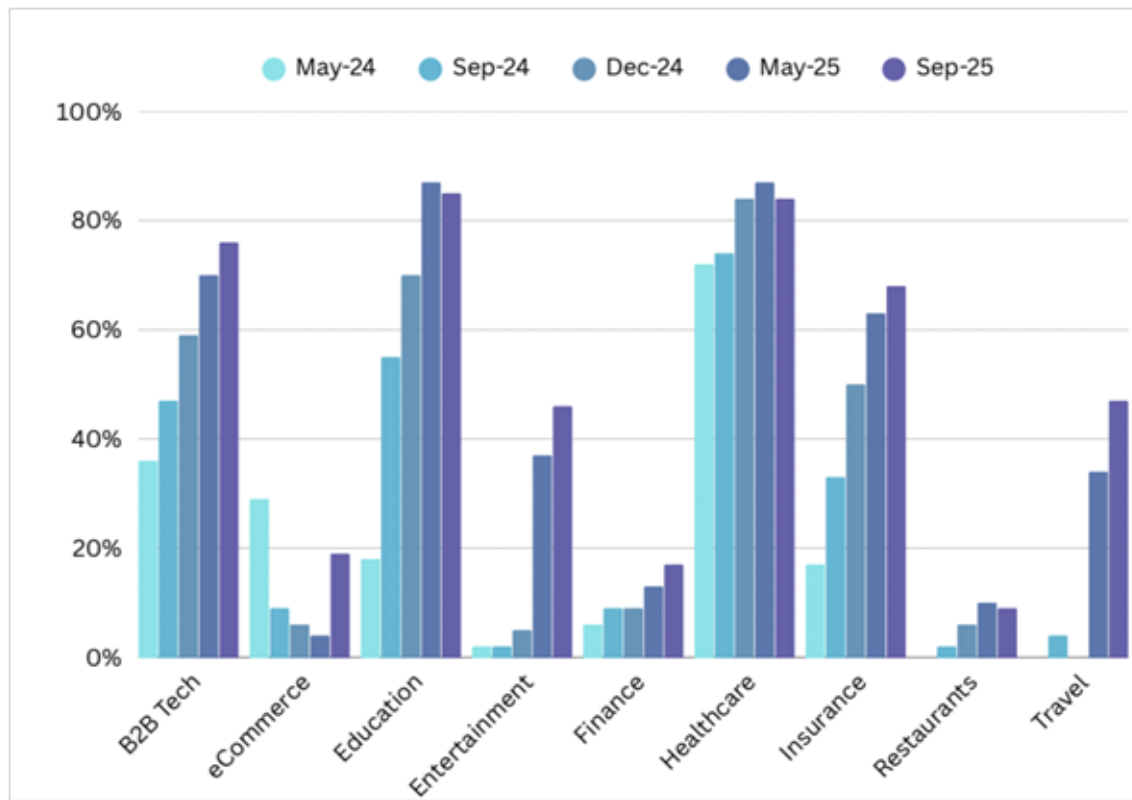
google.com

AI Overview

After a speaking engagement near Toronto Pearson Airport (YYZ), check out Mississauga's top spots: stroll the scenic **Port Credit waterfront** and lighthouse, shop at **Square One**, or relax in the serene **Kariya Park**. For food, explore the diverse restaurants in Port Credit or the culinary options at **The Food District**. [Visit Mississauga +2](#)

- **Port Credit Village & Lighthouse:** A scenic area on Lake Ontario with walking trails, marinas, restaurants, and a lighthouse to take pictures.
- **Square One Shopping Centre & The Food District:** One of Ontario's largest malls, great for shopping and dining (especially at The Food District).
- **Celebration Square:** Located next to City Hall, it often hosts events and is a great spot to relax.
- **Kariya Park:** A tranquil, Japanese-inspired garden known for its cherry blossom trees (in spring) and, to a lesser extent, tranquil walks.
- **Rattray Marsh Conservation Area:** For nature lovers, this area offers trails and a beautiful, untouched lakefront view.
- **Illumi Mississauga:** A light show experience, perfect if you are looking for an evening activity.

AI Overview Growth - By Sector



Source(s): Source: U.S Study by BrightEdge

A decline in site traffic does not automatically mean a decline in influence.

Destination search discovery is now happening inside AI summaries & AI tools



If Ontario's destinations are cited

that matters.

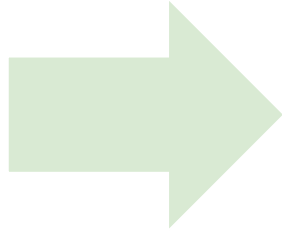


If Ontario's destinations are recommended

that matters.

Even if the user never clicks.

**It does mean that we need to take more
nuanced views on our performance measures**



- Authority (SEO & GEO)
- Site health
- Content engagement

DO's BETS

ON THE PATH AHEAD

ChatGPT

"Help me visualize the path ahead"



1

Build Authority for AI Engines (GEO)

- Completed a Google AI Overview audit to understand how AI interprets destination content
- Implemented technical improvements to guide AI systems on how to access and use our content
- Expanding schema and semantic markup to support citation
- Updated writing guidelines for Generative Engine Optimization (GEO)
 - Shorter paragraphs, simpler language, bullet lists, and clear Q&A sections

SEMrush AI Search Health Score

A score that reflects how optimized a website is for AI search, where a higher score means a website's content is more accessible to AI crawlers, better structured for understanding, and more likely to be included in AI-powered search results and generated answers.



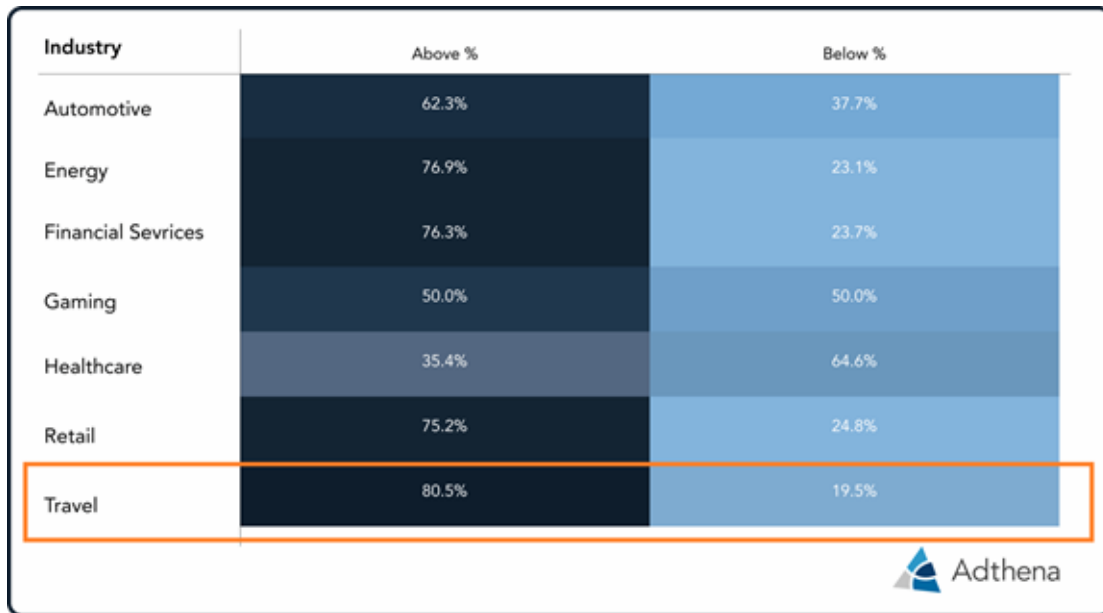
2

Reducing our content footprint - focus on hygiene and health



3

Invest where we have the leverage



AI OVERVIEWS & PAID SEARCH IMPACT

Sponsored search ads (SEM/PPC) do not consistently appear beneath AI Overviews; placement varies significantly by industry.

OUTLOOK

As AI Overviews replace traditional search listings, paid search remains a reliable way for tourism brands to stay visible, helping offset traffic losses from AI-driven zero-click results and declining organic reach.

3

*Invest where we have the leverage . . . **But stay nimble!***

					
GOOGLE: AI OVERVIEWS & AI MODE	GOOGLE GEMINI	CHATGPT	MICROSOFT COPILOT	PERPLEXITY	CLAUDE
<i>AI Overviews:</i> Embedded in traditional Search. <i>AI Mode:</i> New AI chat experience within Google Search launched Aug '25.	Google's stand-alone AI chat experience, separate from the traditional search environment.	First mover in launching conversational search, market leader.	Primarily enterprise adoption due to Windows & Office integrations.	Rapid growth in adoption. Initial differentiators were real-time information and disclosed citations.	More nascent among the group. Recognized for stronger creative capabilities, versus just collating information.
Ads in Canada: Yes	Ads in Canada: No	Ads in Canada: No	Ads in Canada: Yes	Ads in Canada: No	Ads in Canada: No
Ads in USA: Yes	Ads in USA: No	Ads in USA: In Beta	Ads in USA: Yes	Ads in USA: Yes	Ads in USA: No

AI's ADVERTISING LANDSCAPE - ON THE HORIZON

4

Expand our view of “search”





Be Findable.

*Show up wherever
travellers search.*



Stay Current.

*Keep your destination
information accurate*



Be Human.

*Share the real voices
and stories*

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Partnership is not optional in this era.
It is the strategy - and is core to what we do.



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Collaborative Campaign Model



ONTARIO
CANADA



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INSIGHTS PORTAL



- 2000+ Travellers surveyed monthly
- Continuous tracking - monitoring trends over time across Ontario's important source markets
- Centralized **free** access
- Localized Insights

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Integrated Partner activities

Media Relations



Content Development



Ontario Travel Information Services

Broadcast Promotions



Business Development



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Work With Us
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WORKSHOP
Questions for the room

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- 
1. How are these technology shifts impacting your organization?
 2. What tools are you using or actions are you taking within your organization in response?

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3. *Looking forward* - What supports would most help your organization adapt to rapid technology shifts in tourism?

Example opportunities:

- technical workshops or training
- access to thought leaders or expert networks
- shared pilots or experimentation spaces
- formal working groups or communities of practice



Thank you.

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