

A wide-angle photograph of a large, multi-armed wooden dock extending into a calm lake. The water is still, reflecting the sky and the surrounding greenery. In the distance, there are rolling hills and a dense line of trees. A single person is standing on the central arm of the dock, looking out over the water. The sky is a soft, pale blue, suggesting late afternoon or early morning light.

Navigating Change in Tourism Discovery

A Strategic Update from Destination Ontario

Lauchlan Rogers, CMO, Destination Ontario

DESTINATION ONTARIO



oh, great.
change





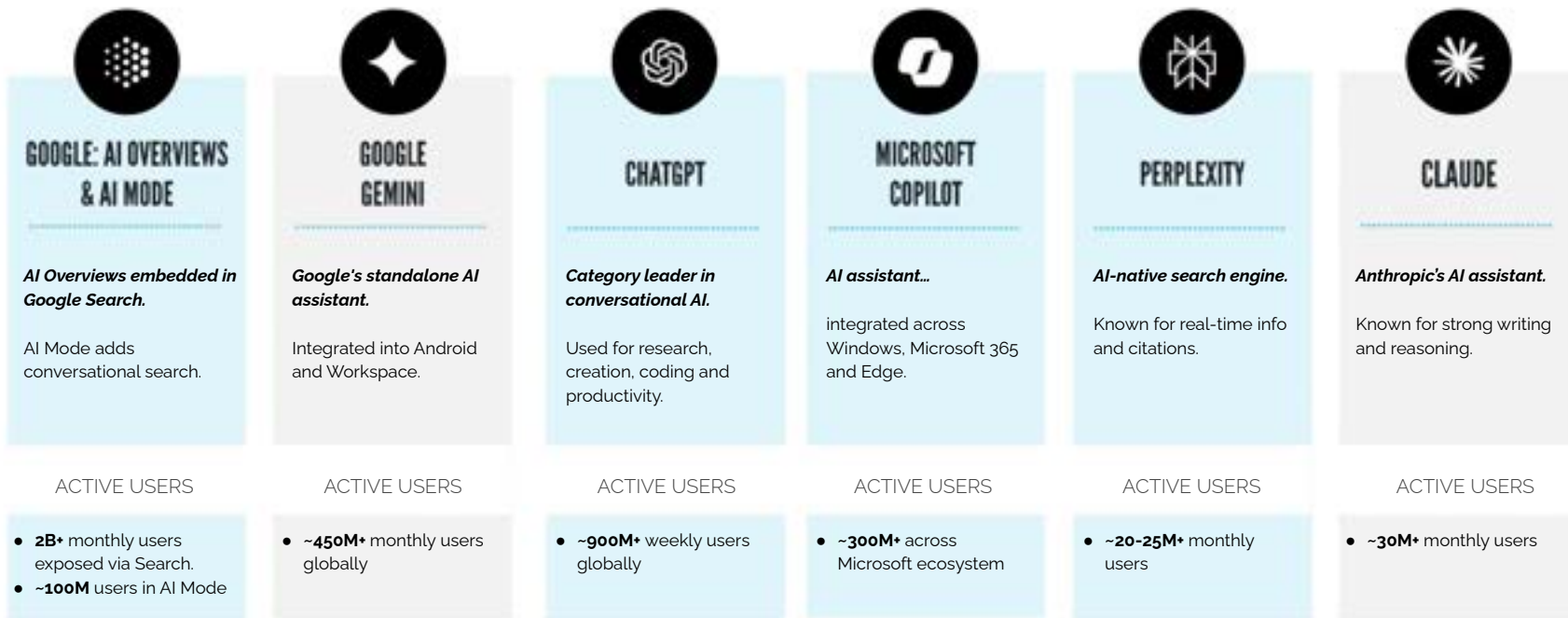
DISRUPTION



The Impact of
Generativ
e 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



Google AI Overviews

Where should I go for lunch : X

google.com/search?q=Where+should+I+go+for+lunch+in+mississauga+after+a+speaking+engagement+n...

Marketing - Googl... Marketing Dashbo... 2025/26 Campaig... Marketing Vacatio... Card for Wellness... All Bookmarks

Google 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.

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 5G+

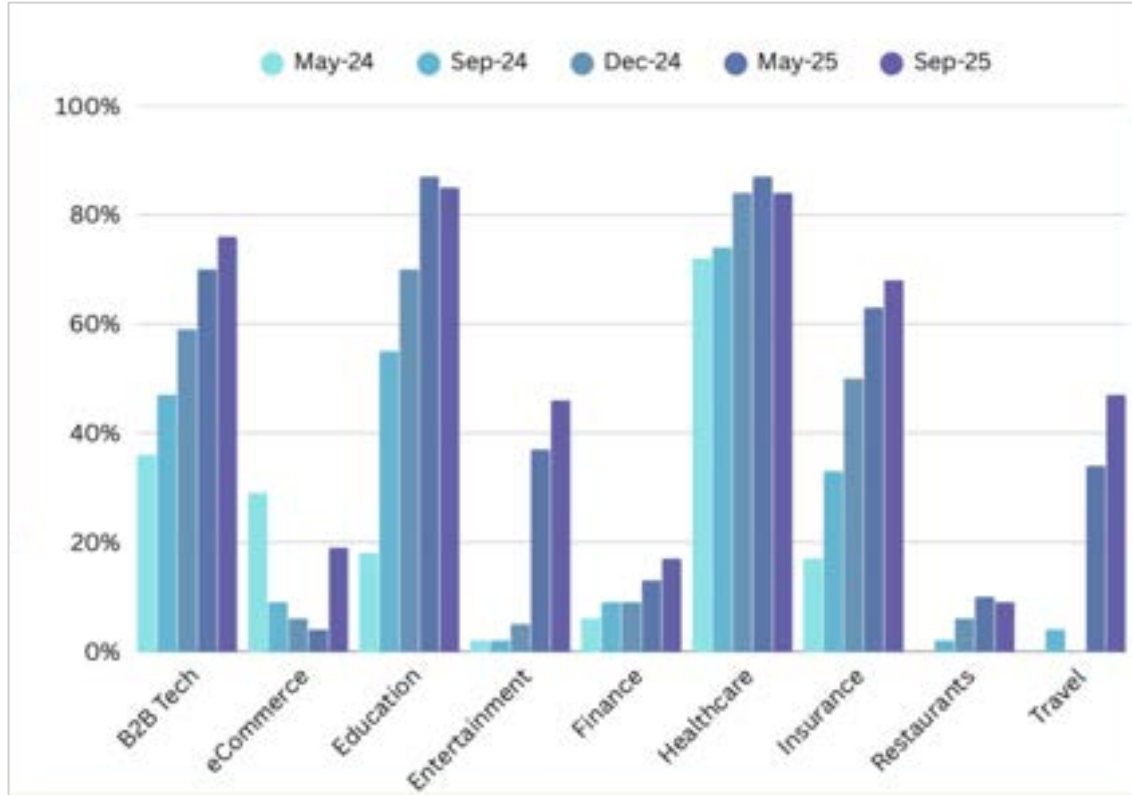
google.com

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**.

- **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 lakelake 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.

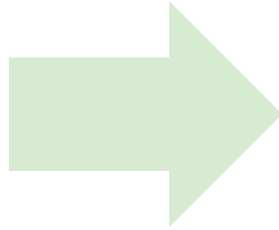


If Ontario's destinations are recommended

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

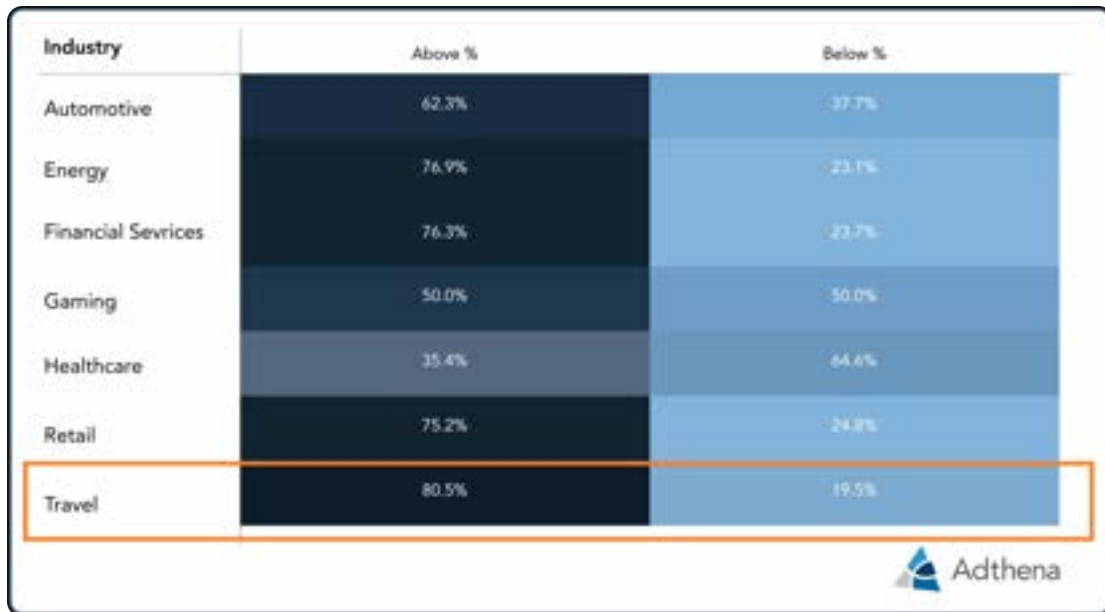
Reducing our content footprint - *focus on hygiene and health*



Retiring **11%** of DO.com's Article content

3

Invest where we have the leverage



AI OVERVIEWS & PAID SEARCH IMPACT

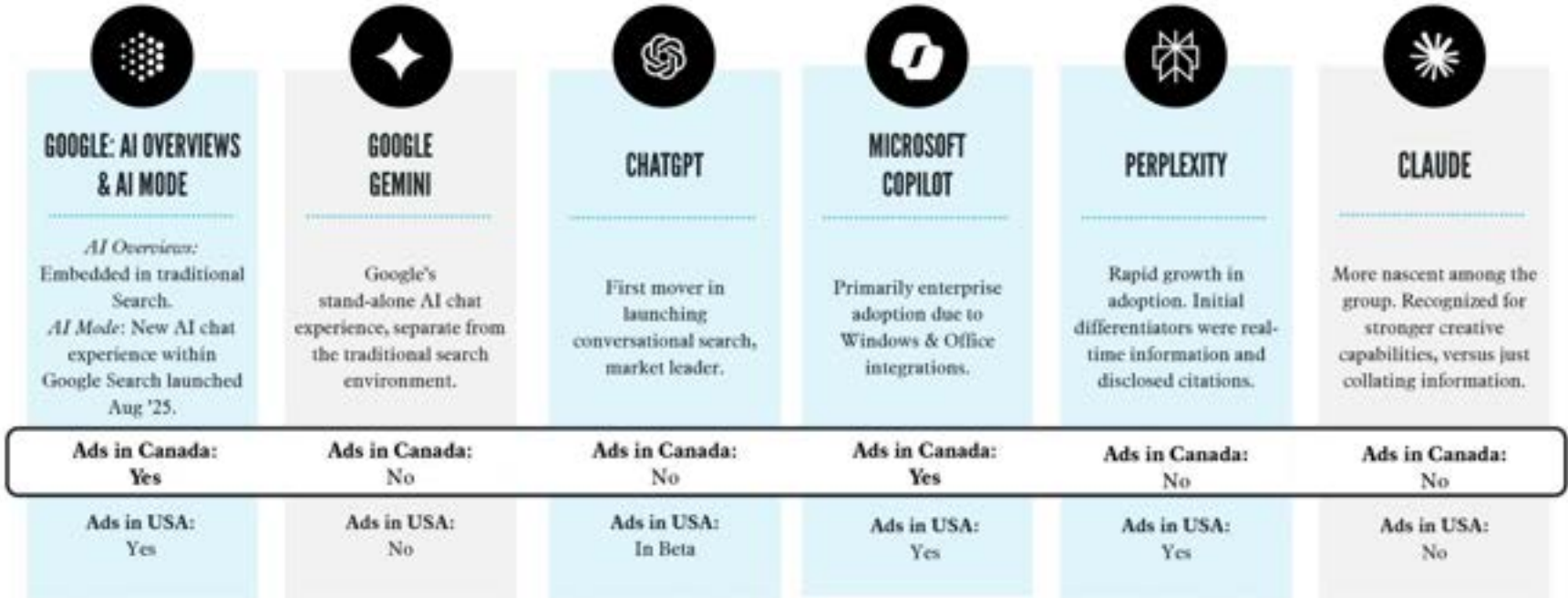
Sponsored search ads (SEM/PPC) do not consistently appear beneath AI Overviews; placement varies significantly by industry.

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!**



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*

DESTINATION ONTARIO

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



DESTINATION ONTARIO Collaborative Campaign Model



ONTARIO
CANADA



DESTINATION ONTARIO

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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Work With Us
DESTINATION ONTARIO



A night sky filled with stars, with a shooting star streaking across the upper right. The bottom of the image shows the dark silhouettes of evergreen trees against a faint greenish glow.

Thank you.

DESTINATION ONTARIO