Big Brands Dominate AI Search But Leave Openings For Smaller Sites via @sejournal, @martinibuster

New research from BrightEdge shows that top brands in travel categories dominate the rankings in both ChatGPT and AI Overviews. What's interesting is that while the BrightEdge data shows that the same brands are dominating travel queries, the top-ranked brands differ according to which sector/niche of travel is being inquired about.

Big Brands Lead Their Sectors

What people choose has generally been biased toward whatever is the most well known. That's the idea behind advertising, that the more well known a product is, the likelier it is to be chosen by a consumer, and if the consumer is delighted by the choice, they'll generally stick with that choice (brand loyalty).

So it shouldn't be surprising that big brands that are well known and trusted by consumers win out for each of their given sectors.

BrightEdge data shows:

> *"American Airlines, Royal Caribbean and Expedia lead their categories on both Google AI Overviews and ChatGPT.*
>
> *Hotels have a different leader on each engine. Hilton leads*

Google AI Overviews at 28.3%. Marriott leads ChatGPT at 29.4%.

2.2x: Expedia's visibility compared with Kayak on Google AI Overviews (31.3% vs 14.4%). On ChatGPT, the gap is 1.4x.

38%: share of booking-intent prompts on Google AI Overviews that name a booking platform, against 12% of inspiration prompts.

78%: Booking platforms appear in 78% of budget-related Google AI Overviews answers, compared with 17% of other answers.

9%: Only 9% of tracked Google AI Overviews prompts have booking intent."

Then elsewhere it shows how brands dominate their categories:

Airlines. American Airlines leads on Google AI Overviews (26.6%) and ChatGPT (25.3%). Its gap to United is 6.1 points on Google AI Overviews and 9.1 points on ChatGPT.

Cruise lines. Royal Caribbean leads on both engines, at 24.8% and 28.8%. Royal Caribbean and Carnival have higher visibility in this ChatGPT sample, while Viking has lower visibility."

Lastly, the BrightEdge data shows where smaller brands may have an uphill fight competing: Queries with the word "cheap."

"Booking platforms appear in 78% of tracked Google AI Overviews answers involving terms such as "cheap," "deal," "budget" or "last-minute," compared with 17% of other answers. Expedia appears in 44% of the budget-related answers.

The pattern suggests that price-focused questions are an important area for booking platforms to track. It is an observed association, not evidence that using these words

causes a brand to appear."

One additional thing to point out is that AI search doesn't link out to sites with rankings in the same way that classic Search does. This is why BrightEdge calls these figures share of voice, rather than rankings of individual search results. They measure appearances among tracked AI answers because AI does not feature traditional ranking positions.

Inspiration Questions: Human Subjectivity

Adding further complexity to understanding the AI results is that the results containing user generated content (UGC) and content with a human experience quality to it tend to rank better for queries that are related to inspiration. There is less domination of big brand rankings for subjective queries, which creates and opening for sites like Reddit and YouTube.

While BrightEdge did not speculate as to the reason why big brands don't show for those kinds of queries, it may be that queries that require human experience are not the kinds of queries that big brands focus on. That data point may be a bright spot not just for forums and Reddit but also for travel blogs and smaller travel-related sites that can be subjective and can add unique human insights and subjectivity.

BrightEdge says this about what their data shows:

> *"Platforms and organizations such as YouTube, Reddit and AAA are more prominent in inspiration questions.*
>
> *Hotels and cruise lines feature more heavily in comparison questions, while booking platforms appear more often in booking-intent questions. Only 9% of tracked Google AI Overviews prompts fall into the booking-intent category.*

> *Inspiration and comparison account for most of this panel, making them important areas for travel brands to measure visibility and competition.”*

That means there is an opening for smaller and rising brands to cover areas where human experience, human judgement, and subjective opinion based on experience is valued and sought after by consumers.

Queries that clearly belong in specific categories tend to be dominated by big brands. Like regular search though, the key to breaking into most any niche is to grow awareness of a brand and build trust. Search engine rankings are heavily influenced by user behavior signals and those rankings are then fed up the pipeline to AI chat.

BrightEdge observes:

> *“Categories: hotels, airlines, booking platforms and cruise lines. Non-travel platforms such as YouTube and Reddit are excluded from the category rankings.”*

The door into ranking is inspiration and subjectivity, the kinds of things that Reddit tends to rank for. That said, UGC and platform rankings have historically been vulnerable to smart and aggressive content strategies, so I would encourage travel bloggers to eat Reddit’s lunch with expertise because expertise and authoritativeness has never been Reddit’s strength.

Read the full findings at BrightEdge: Holiday Travel in AI Search: The Travel Brands AI Puts on Its List

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