The Impact of AI Overviews in the Cultural Sector

UK edition, August 2025

ONE FURTHER

Contents

About this report

Google's rollout of AI Overviews has generated widespread concern among digital marketers across industries and plenty of speculation.

Our clients have been asking what this means for their search visibility and content strategies, so we did what we often do in this position: we collected data to draw our own conclusions.

We analysed search traffic from 100 UK cultural organisations, comparing January to July 2025 with the same period in 2024.

AI Overviews first appeared in August 2024, but from March 2025 they were expanded in the UK to cover searches that are highly relevant to cultural organisations. That makes this the key period for assessing their impact.

The main finding is clear: AI Overviews are beginning to reshape the patterns of traffic to cultural organisations' websites.

And while the impact varies depending on the specifics of an organisation's digital presence and its goals, we think that the shift is significant enough that everyone in the sector needs to pay attention.

What this report covers

This report explains how AI Overviews are changing search and which types of cultural content are likely to be most affected.

It also sets out what organisations should consider doing in response, with practical recommendations for immediate actions and longer-term strategy.

About One Further

One Further is a digital consultancy that works with arts and culture organisations. We take the guesswork out of digital.

We have particular expertise in digital analytics and content strategy, including SEO, and have worked with many of the organisations featured in this report.

This report was produced by **Beth Downs** (Content Analyst - SEO) and **Chris Unitt** (Founder), with support from the wider One Further team.

We hope you find the report useful. If you do then let us know or, even better, share it with others.

Background

Background

The importance to Google search traffic to cultural organisations

For most cultural organisations, search engines account for 40–60% of all website traffic, often making organic search the single most important channel for digital engagement.

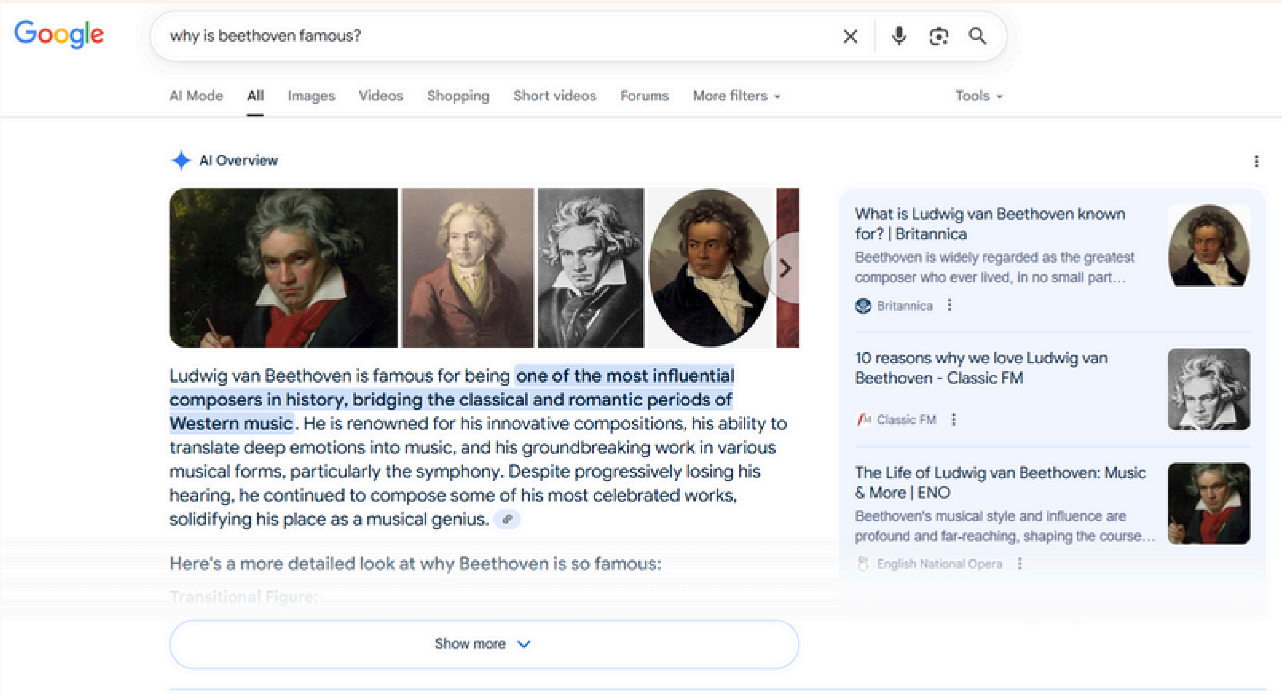
Google is often the first stop when someone decides to book theatre tickets, plan a museum visit, or explore what's on in their area. This transactional traffic is particularly valuable, because it signals a clear intent to engage.

Search is also a key driver of discovery beyond ticket sales. Many organisations invest in online collections, learning resources, and articles designed to reach wider audiences. This content not only supports public and educational missions but also builds institutional authority.

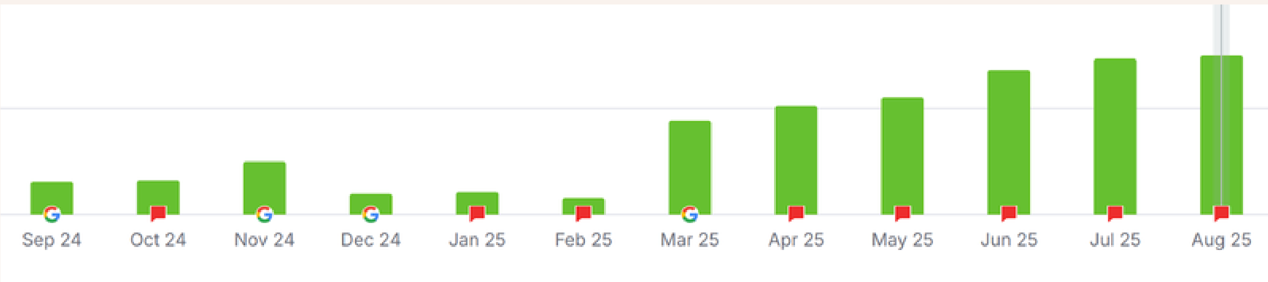
If this content becomes less visible, the loss goes beyond visitor numbers and could undermine an organisation's ability to deliver its broader objectives.

Google's introduction of AI Overviews

Over the past year, Google has rolled out AI Overviews. These are AI-generated summaries that appear at the top of millions of search results. These often reduce the need for users to click through to external websites.



This chart provides an indicative example of how AI Overview coverage is growing in the cultural sector.



They began appearing in August 2024, but in March 2025, they were expanded to cover queries related to three sectors - entertainment, restaurants, and travel.

This meant that they started showing up much more frequently in searches relevant to cultural organisations.

The wider Google search picture

Crucially, this downturn is happening even as Google reports healthy growth in search overall. As the company noted in its Q2 2025 earnings call:

> "Overall queries and commercial queries on Search continued to grow year-over-year. And our new AI experiences significantly contributed to this increase in usage."

And on AI Overviews specifically:

> "We know how popular AI Overviews are because they are now driving over 10% more queries globally for the types of queries that show them, and this growth continues to increase over time."

So while search demand apparently remains strong, the distribution of value has shifted. Google is capturing more of the user's attention within its own results, leaving less to flow through to cultural organisations' websites.

What we found

Main findings

Organic traffic dropped by 10% in early 2025

That doesn’t sound so bad, but bear in mind that it went up 30% over the same period in 2024, so **that’s a 40 percentage-point downward swing**.

Most of the drop has happened since March, when AI Overviews were rolled out to cover queries more relevant to the arts and culture sector.

80% of the organisations we looked at have been affected

80 of the 100 organisations have seen their search traffic decline in the first half of 2025, compared to just three organisations over the same period in 2024.

Only 7 organisations have seen stronger results in 2025 and those can mostly be explained by recovery from an especially poor 2024, or in one case, by 2025 being a significant anniversary year.

Informational content has been hit hardest

That includes visitor information, articles (especially entry-level pieces such as beginners guides and glossaries) and, in some cases, online collections.

More transactional content, such as event and exhibition pages, has been less affected so far.

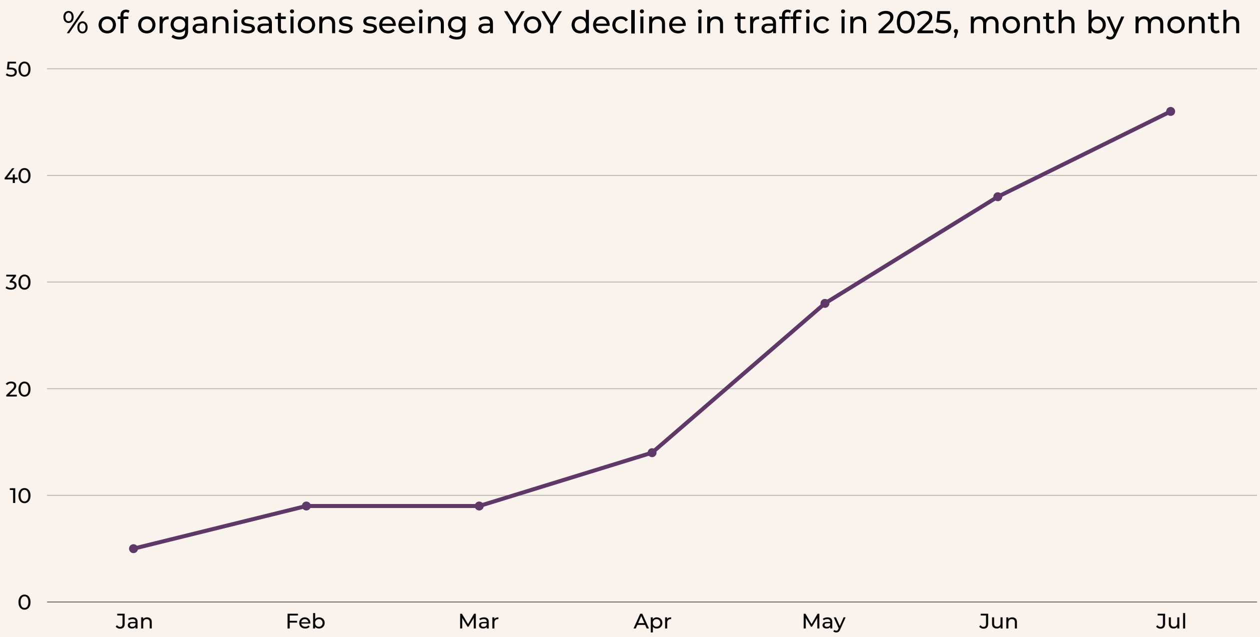
Organisations usually show up in 6% of AI Overviews

That’s the average across our dataset. **Top performers appear in 13%**. Those tend to be organisations that had strong SEO foundations in place already and a national/international remit.

In more detail

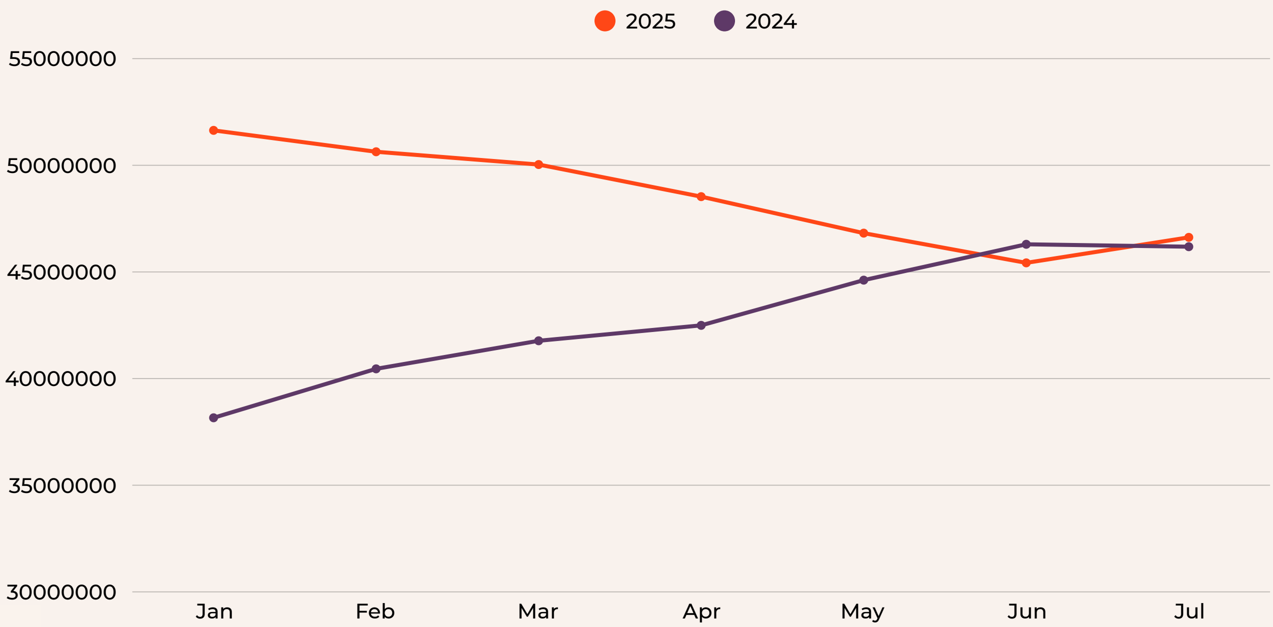
Since March 2025, when AI Overviews were extended to cover searches related to entertainment and travel, an increasing number of organisations have seen their traffic from Google go down year-on-year.

As the months have passed, more and more of the organisations we looked at have seen lower levels of traffic compared to 2024.



2024 was a good year for traffic from Google, which tallies with their announcement that overall queries have increased.

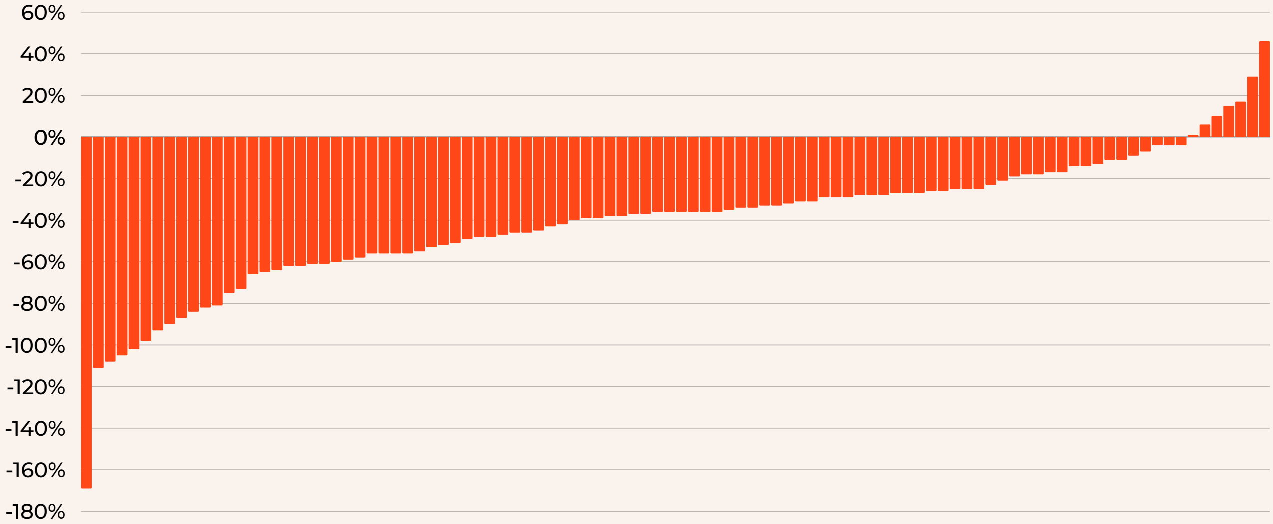
But over the same period in 2025, the total volume of search traffic to the organisations in our group is down.



By the end of July 2025, only 20 organisations had seen an increase in search traffic compared to the same period in 2024. In most of those cases, the increase was smaller than in 2024.

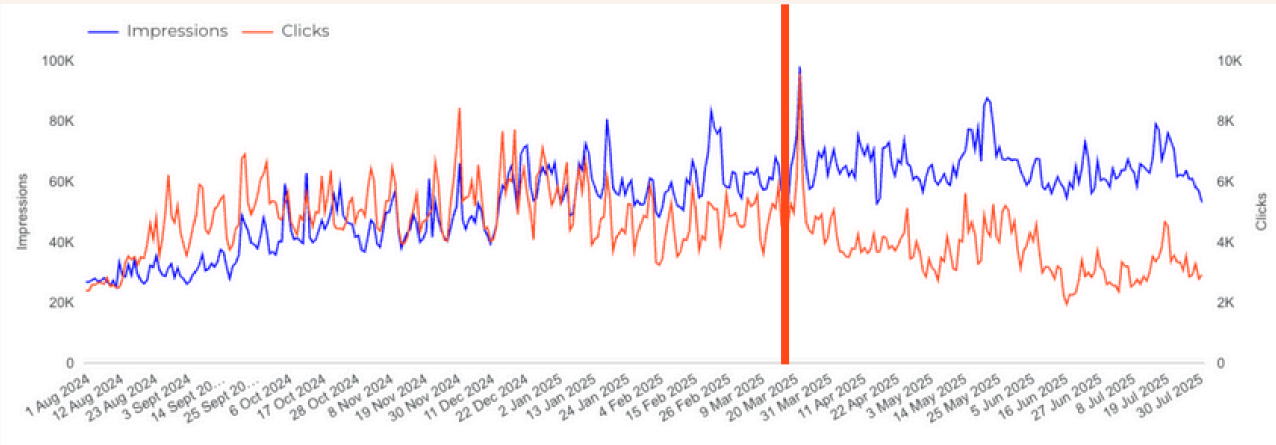
It wasn't bad news for everyone. 7 organisations outperformed their early-2024 results. Although most can be explained by particular circumstances. For instance, recoveries from website relaunches, or 2025 being a significant anniversary year.

% change in search traffic performance from 2024 to 2025, by organisation



Google Search Console data for many organisations shows impressions rising while clicks decline. This **'crocodile mouth effect'** reflects more people seeing a result in Google, but fewer clicking through to the website if the AI Overview answers their query on the page.

This screenshot of a UK theatre's Search Console data shows clearly how search visibility and search traffic have started to become less connected.

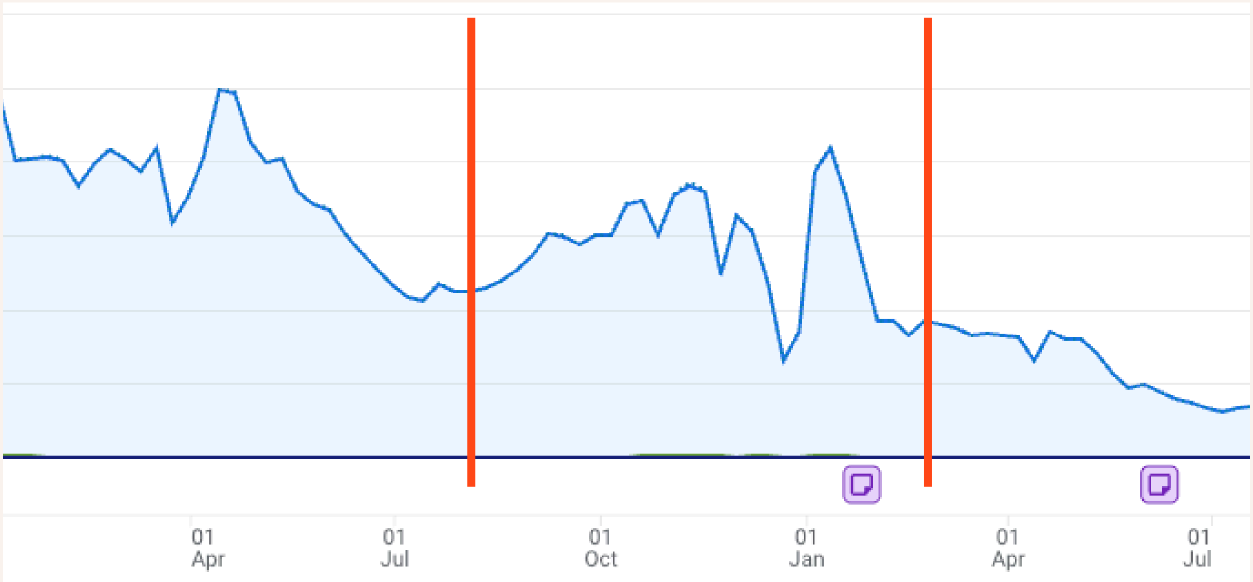


In some cases, the impact of AI Overviews has been especially noticeable.

In one case, a museum's content hub (containing well search-optimised articles) used to attract substantial amounts of search traffic.

Following the initial rollout of AI Overviews (the first red line), traffic from Google didn't fully recover after the customary summer lull.

The decline, which hasn't been attributed to any other factors, has continued in step with the further rollout of AI Overviews. Especially following March 2025.



Of course, while it's frustrating to see SEO investment bring fewer visits, this content still has value. It can still attract search traffic, can be promoted through other channels, and can be repurposed for other channels.

By contrast, **event and exhibition pages have proved more resilient**. Their blend of information and transactional intent, along with time-sensitive relevance, appears to have helped them maintain both visibility and clicks.

There are also **opportunities for some to improve their visibility**.

On average, organisations in our dataset appear in about 6% of the AI Overviews for keywords relevant to them. Organisations below this figure will have room to improve their visibility through optimisation.

For instance, one heritage organisation in the dataset appears in only 960 of 35,000 available AI Overviews. There's an opportunity to improve this.

What you should do

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What you should do

Understanding the new normal

Before deciding what to do about these changes, it's important to be clear-eyed about the current search environment:

- **Traffic from Google is down and it's not coming back**. This is what we mean by the new normal.
- We may not have reached the bottom yet. **Further declines are possible**, especially with the development of Google's new AI Mode.
- At the same time, **traffic from Google is still important**. SEO is not dead and previous efforts haven't been wasted. The data shows organisations with strong SEO foundations faring better than others. Search remains a vital channel for discovery and influence, even if its role is shifting.
- In some areas, **Google may be becoming less of a gateway and more of a destination** in its own right. Just as with Wikipedia, being present in that space still matters, even if traffic is less of an objective.

Is this really a problem?

Your degree of exposure will depend on your circumstances:

- **For ticket sales and visits**: the immediate disruption is likely to be limited. AI Overviews aren't impacting transactional searches so much. The main task is the same as before - ensuring that practical information is easy to access, accurate, and machine-readable.
- **For organisations reliant on informational content**: the stakes are higher. Some articles, collections, and resources are losing visibility, which could reduce reach and undermine some types of monetisation or funding.
- **Longer-term**: Google's trajectory suggests it wants to own more of the user relationship. It's not yet a crisis in this sector, but it could become one for organisations with publishing, educational, or commercial arms.

So while the scale of the problem varies, every organisation should be preparing for a future in which less Google traffic flows to their site.

Depending on how seriously you're likely to be affected, here are our three recommended areas to consider...

1.

Optimise your content for AI Overviews

To improve the chances of your content appearing in AI Overviews, focus on:

- **Content structure:** Clearly answer user queries within the first 100 words. Use straightforward, concise language that AI systems can easily interpret. Q&A formats are proving particularly effective.
- **Structured data:** Use schema markup, a technical way to describe the content of your website to Google. For cultural organisations, schema for events, exhibitions, artworks, and historical information is especially relevant.
- **Authority signals:** Where possible, credit named experts and include short biographies. This builds trust and credibility, which are qualities Google prioritises in AI Overviews.

2.

Diversify your approach to search visibility

Relying on Google to give you lots of free website traffic might not be a sustainable approach for much longer. So while your content should still be properly optimised for SEO, you should look for other ways to remain visible:

- **Be findable wherever people are searching:** Google will remain a key source of information for audiences but, depending on the subject matter, people search elsewhere too. You may want to ensure you're discoverable on YouTube, social media platforms, and large language models (LLMs) such as ChatGPT too.
- **Leverage your Google Ad Grant:** If eligible, the £8,000/month free advertising can help offset declines in organic visibility. AI Max for Search campaigns are becoming available to Ad Grant accounts and should be tested and scaled promptly.

3.

Look for strategic opportunities

You could treat this as an opportunity to re-examine your wider content and digital strategy.

Google is increasingly delivering answers directly to users, reducing the share of traffic reaching individual sites. In this environment, channels you own, such as mailing lists, become even more valuable.

Some questions for long-term planning:

- How can your digital content strategy strengthen your organisation's resilience against ongoing algorithm changes? This applies to social media as much as it does to search engines.
- How can collaboration with partners extend the reach and effectiveness of your content? It's getting harder to put your content in front of audiences, so working with others will be important.
- How could you shift from "content as a cost" to "content as a revenue-generating asset"? This is a much bigger question, but one that digitally-savvy organisations are exploring.

Traffic levels seen before 2024 are unlikely to return. Proactive adaptation now will help ensure your organisation remains visible and relevant in the evolving search landscape.

About the data

About the data

We examined data from 100 UK cultural organisations.

These included museums, theatres, heritage sites, galleries, and arts venues. They were drawn from Arts Council England's National Portfolio, DCMS-funded museums, and other notable organisations with significant organic search profiles.

Data collection

We used Semrush, a popular search engine marketing tool, as our primary source of data. Specifically, we gathered:

- Monthly organic search traffic estimates (January 2024-July 2025).
- AI Overview presence: the number of keywords triggering AI Overviews where an organisation's domain does, or does not, appear as a source.
- Search keyword Intent: an estimate per organisation of the percentage of keywords that could be described as either informational, commercial, navigational, or transactional. This data wasn't used in the report but has helped to inform our thinking.

Limitations and caveats

- Semrush provides modelled estimates, not actual analytics data. However, we know from cross-referencing with data from Google Analytics that it's usually in the right ballpark and, in this case, it's the overall trend that we're interested in.
- This analysis represents a snapshot of a dynamic situation. Things are in a state of flux at the moment.
- Attribution is complex. Various factors affect organic search performance and could explain fluctuations on a case-by-case basis.

Full organisation list

We gathered publicly available data for the following organisations.

Almeida Theatre, Amgueddfa Cymru-Museum Wales, Ashmolean Museum, Baltic Centre for Contemporary Art, Barbican Centre, Belgrade Theatre, Birmingham Hippodrome, Birmingham Museums, Birmingham Repertory Theatre, Birmingham Royal Ballet, BookTrust, Brighton Dome & Festival, Bristol Museums, Bristol Old Vic, British Film Institute, British Museum, Britten Pears Arts, Chichester Festival Theatre, City of Birmingham Symphony Orchestra, Contact, Courtauld Institute of Art, Curve Theatre, Derby Theatre, Donmar Warehouse, English National Ballet, English National Opera, Everyman & Playhouse, FACT, Factory International, Halle Concerts Society, Hay Festivals, Historic Royal Palaces, HOME, Imperial War Museums, Kiln Theatre, London Museum, London Symphony Orchestra, Manchester Art Gallery, Mayflower Theatre, Museum of the Home, National Galleries of Scotland, National Gallery, National Museums Liverpool, National Museums Scotland, National Portrait Gallery, National Theatre, Natural History Museum, New Adventures, New Vic Theatre, New Wolsey Theatre, Northern Ballet, Northern Stage, Nottingham Contemporary, Nottingham Playhouse, Opera North, Philharmonia, Rambert, RGB Kew, Royal & Derngate, Royal Academy of Arts, Royal Albert Hall, Royal Armouries, Royal Ballet & Opera, Royal Collections Trust, Royal Court Theatre, Royal Exchange Theatre, Royal Liverpool Philharmonic, Royal Mint Museum, Royal Museums Greenwich, Royal Philharmonic Orchestra, Royal Shakespeare Company, Sadler's Wells, Science Museum Group, Shakespeare Birthplace Trust, Shakespeare's Globe, Sheffield Museums, Sheffield Theatres, Somerset House, Southbank Centre, Tate, The Box, The Glasshouse, The Hepworth Wakefield, The Lowry, The Lyric Theatre Hammersmith, The O2, The Photographers' Gallery, The Place, The Roundhouse, The Tank Museum, The Wallace Collection, Theatre Royal Stratford East, Theatre Royal Plymouth, Unicorn Theatre, Victoria and Albert Museum, We The Curious, Welsh National Opera, Whitechapel Gallery, Yorkshire Sculpture Park, and The Young Vic.

A note on attribution: The organisations listed above were included in our dataset for the purpose of analysis. They were not directly involved in, nor do they necessarily endorse, the findings of this report.

ONE FURTHER

One Further is a digital consultancy that helps cultural organisations understand and better serve the needs of their online audiences.

We take the guesswork out of digital.

We do that using website analytics, usability research, and content strategy.

Our clients include the British Museum, Royal Academy of Arts, Royal Museums Greenwich, Royal Shakespeare Company, Tate and the V&A.

If you think we might be able to help you, then please get in touch.

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