

Building Brands for Commercial Outcomes in the Agentic Search Era





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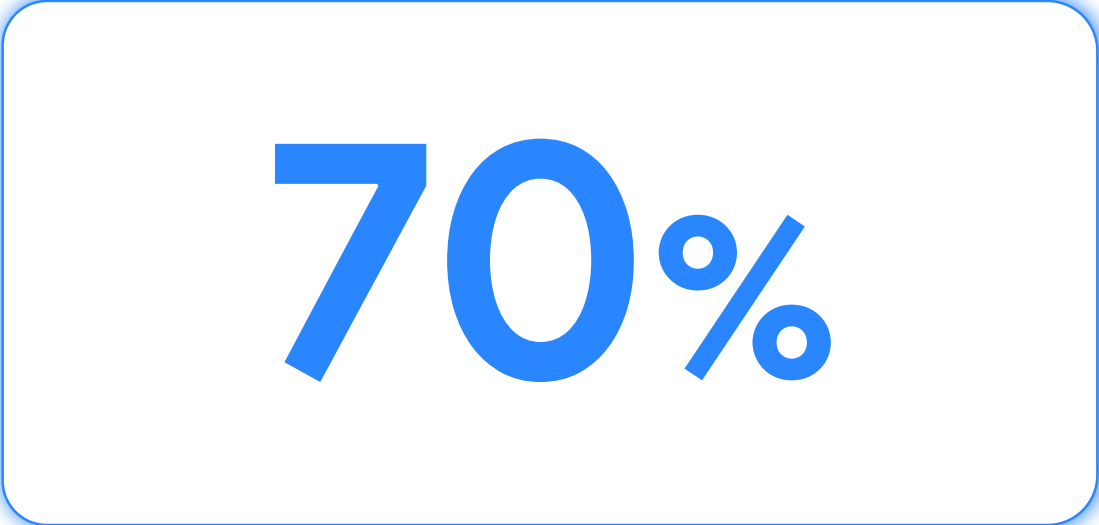
Customers

Marketing
is an investment

Future

“Drive real business growth”

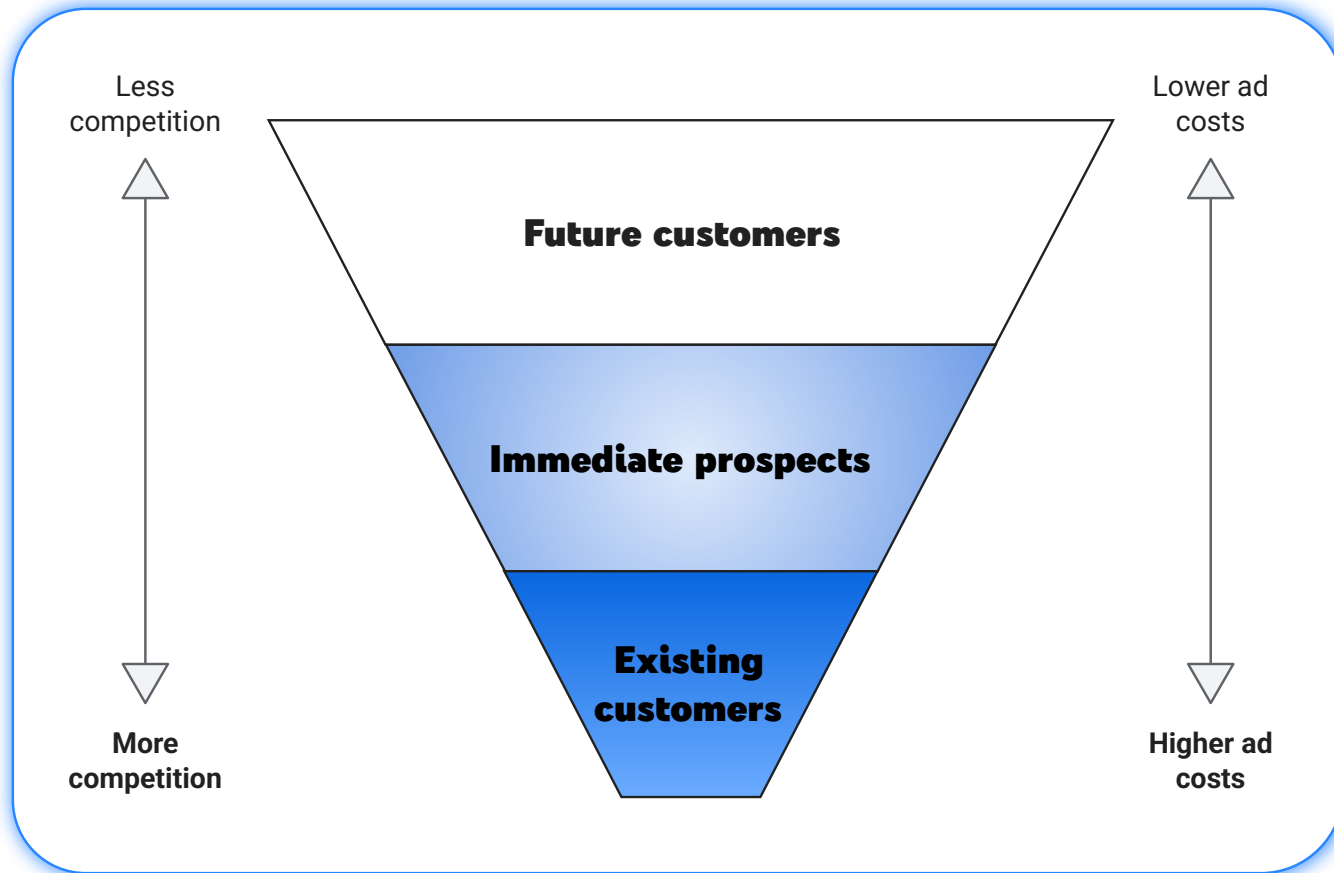
Measuring true business value



70%



70% of US marketers have shifted from basic campaign metrics to measuring real business value (BCG). Source: Google/BCG, Global Measurement Survey, US, n=648 senior marketing analytics professionals with an annual ad spend of >\$500k. Fielded Jan 27-Feb 15, 2025



40%

of a brand campaign's impact
is felt in the first month

60%

of a brand campaign's impact
is felt in month 2 through 24

Trust is more important than ever in the AI Era

AI Users vs.
Non-AI Users

3x

Touchpoints

Top AI Barriers

#1

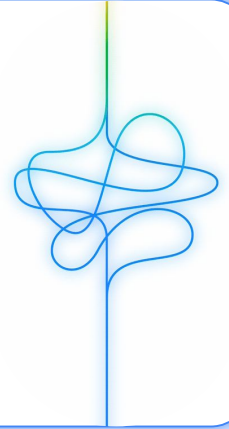
“I don’t trust AI”



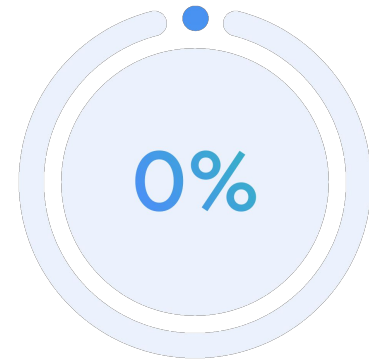
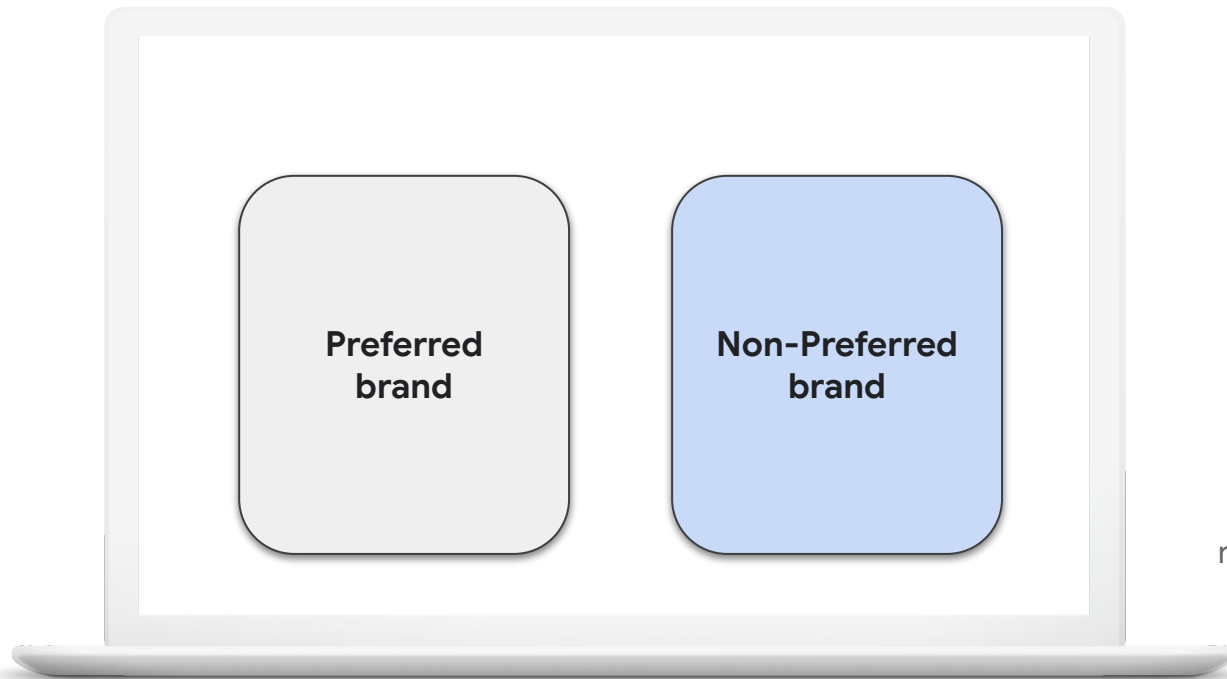
Source: Google Global Consumer Journeys Refresh, December 2025, Online survey, AU, Adults 18+, online shoppers who made a consumer good purchase requiring consideration in the past week (range of categories) comparing n=375 who used AI in their journey to n=1082 that did not. Q: Please select the best description(s) for why you have not used any AI websites, apps, or products. Select all that apply. Base: who never used any AI products in our survey; MOEs $\approx$ +/- 8%; Google AI Pulse Q4 2025

The Trust Line

Every purchase decision is now governed by an invisible frontier

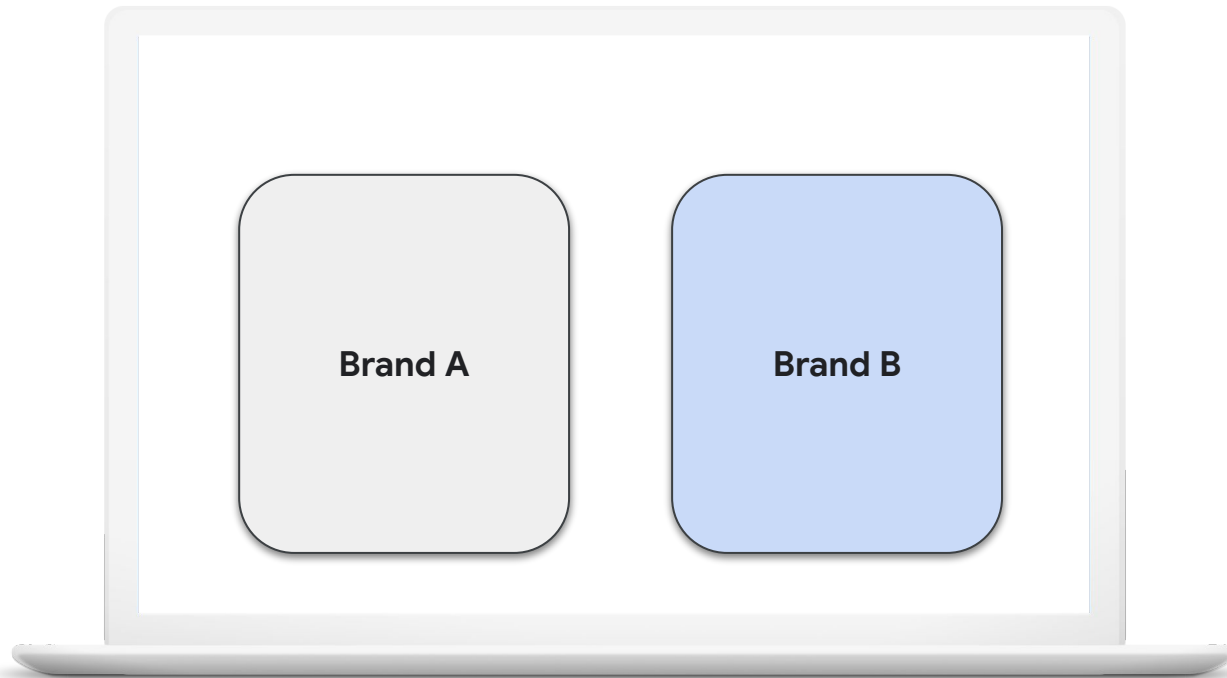


Brand is extremely powerful when AI agents make suggestions



of consumers **would not accept a recommendation** from an AI agent **without further analysis**, if it recommended their non-preferred brand

Brand is your moat against commoditisation

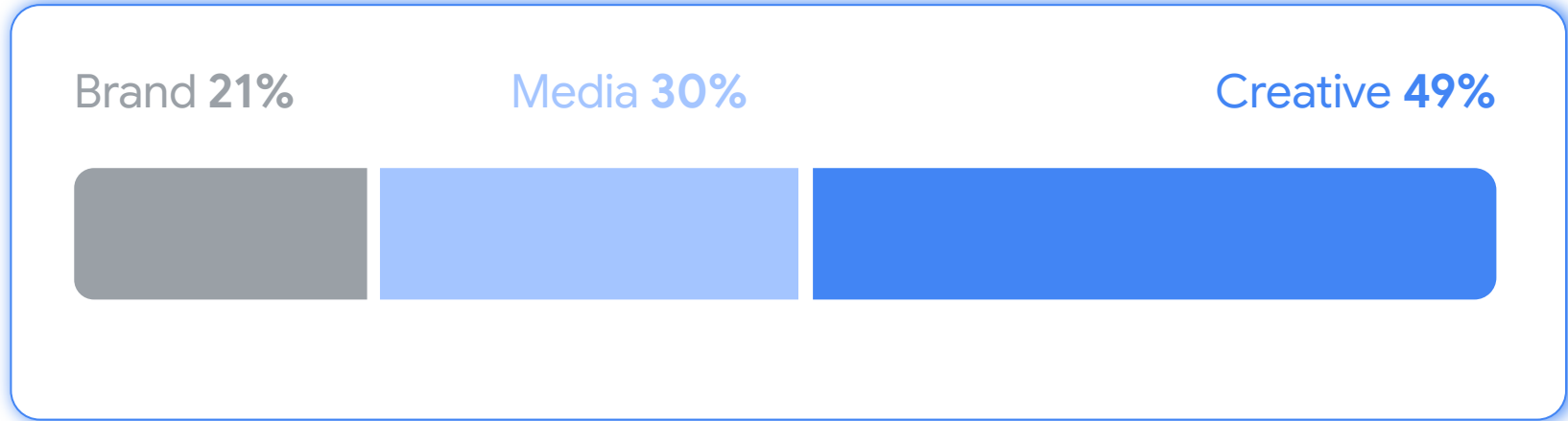


Respondents value
brand and trust

4x

**more than the cheapest rate, if
an AI agent recommended two
brands that both met their criteria**

What makes a brand **memorable**?



A Attention

Hook and sustain attention with an immersive story

B Branding

Brand early, often and richly

C Connection

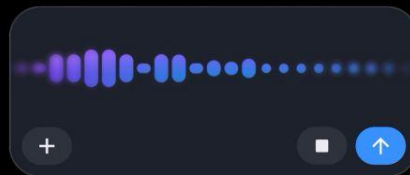
Help people think or feel something

D Direction

Ask them to take action



+ what to watch on sunday night



Search

+ Ask Google

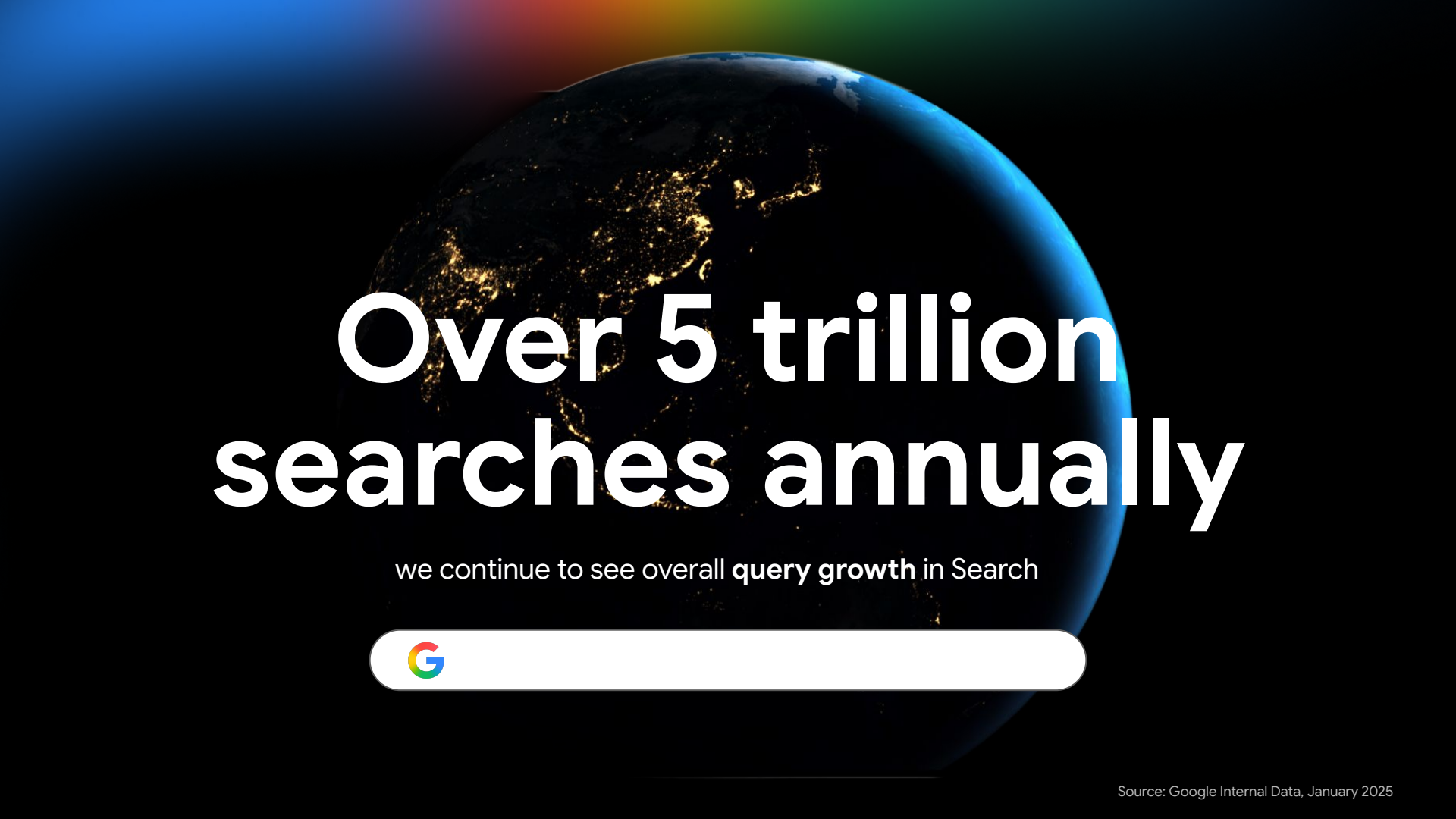


AI Mode

+ best wet food for cats

I'm redoing the landscaping in front of my house.
what should I do



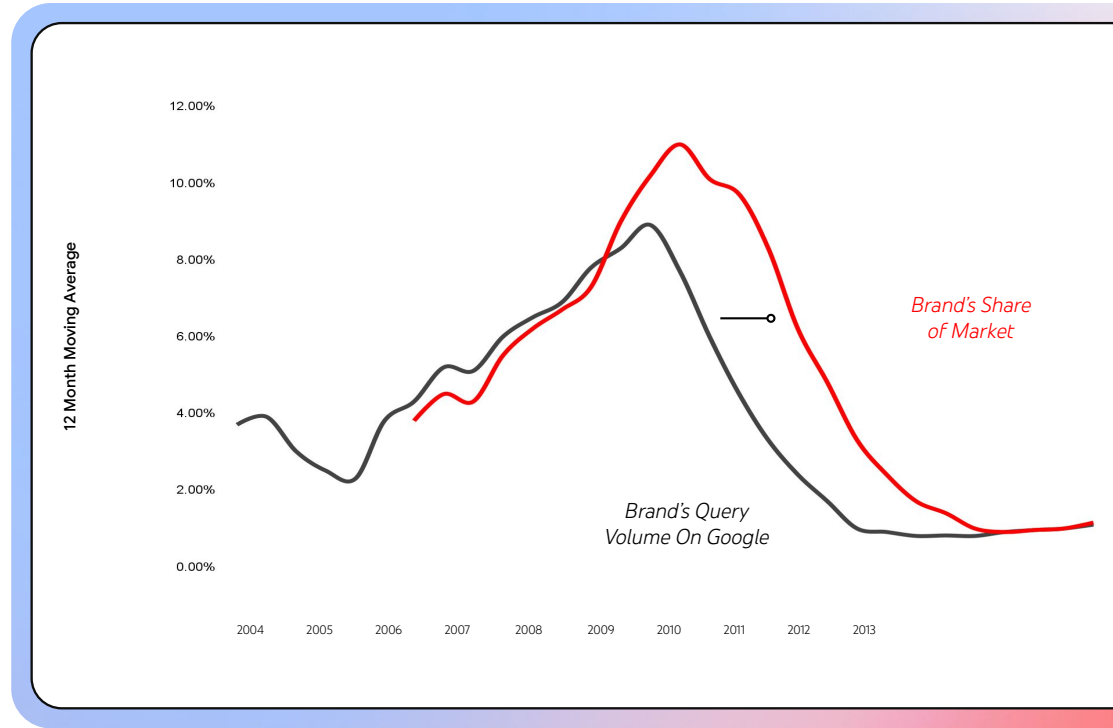


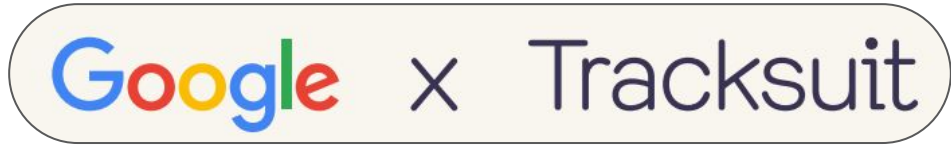
Over 5 trillion searches annually

we continue to see overall **query growth** in Search



Brand query growth is a proxy for sales



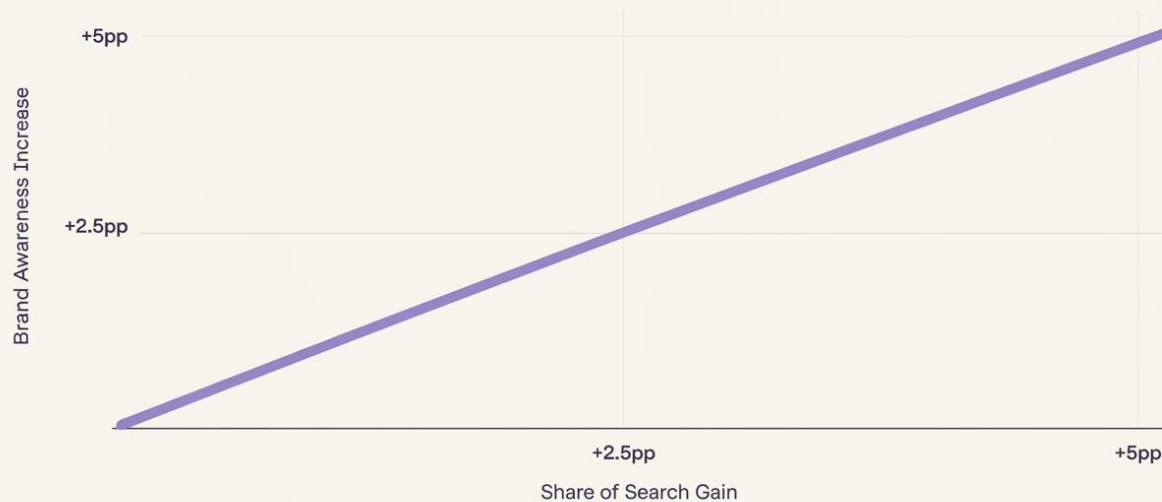


Brand Awareness vs. Share of Search gains

Tracksuit

Invest Early. At 30% brand awareness every +5 points of brand growth = +5 points of Share of Search

● Low Awareness = 30%

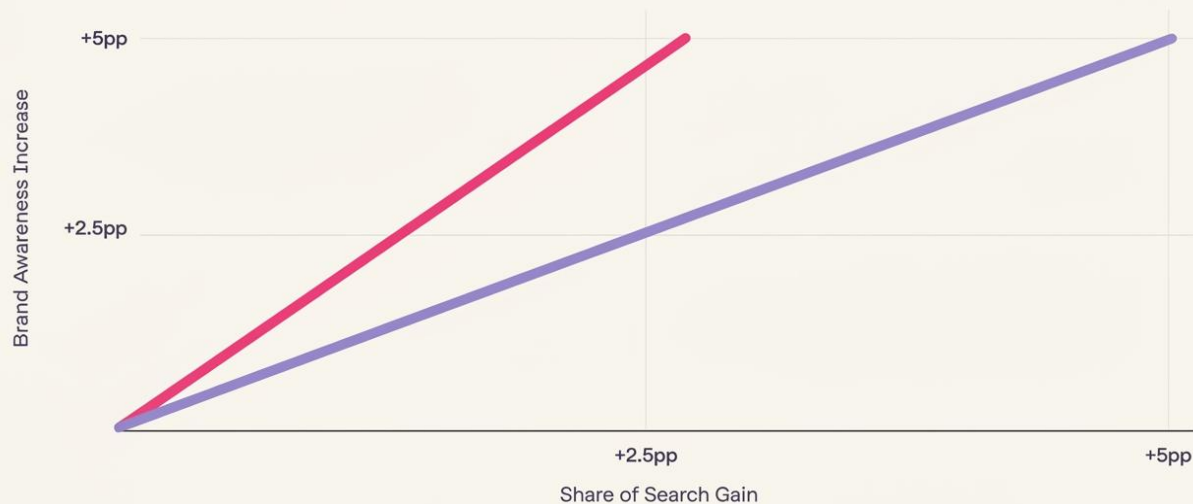


Brand Awareness vs. Share of Search gains

Tracksuit

Invest Early. At 30% brand awareness every +5 points of brand growth = 5 points of Share of Search

● Low Awareness = 30% ● Med Awareness = 60%

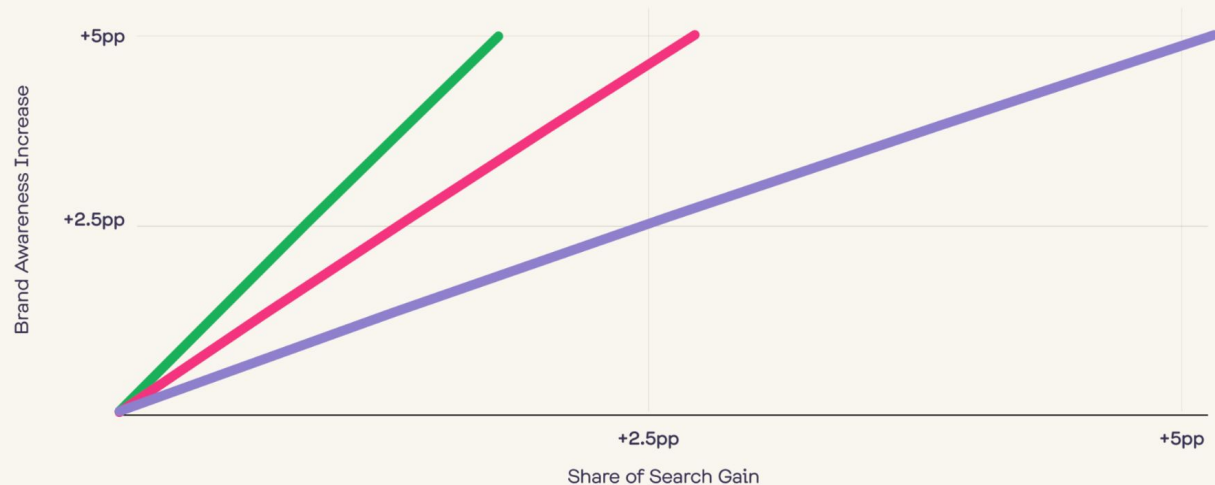


Brand Awareness vs. Share of Search gains

Tracksuit

Invest Early. At 30% brand awareness every +5 points of brand growth = +5 points of Share of Search

● Low Awareness = 30% ● Med Awareness = 60% ● High Awareness = 90%



Challenger, low awareness brands

Build brand early

**Capture the highly efficient,
linear growth in Share of Search**

Challenger, low awareness brands

Build brand early

**Capture the highly efficient,
linear growth in Share of Search**

Leading, high awareness brands

Protect salience

**Expand your audience, target
new category entrants and
lapsed users**

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All brands

**Monitor Search behaviour within the category, use it as a diagnostic
tool and as a way to justify brand investment**

