Google Tracksuit

Return on Awareness

How brand awareness drives share of search and why it pays to invest early

Contents

Return on Awareness

How brand awareness drives share of search and why it pays to invest early.

Brand marketers have a problem that performance marketers don't: their most important work is the hardest to prove. Awareness. Familiarity. Trust. These things drive purchasing decisions every day. Getting a room full of spreadsheet thinkers to believe that is another matter.

So the metrics that win budget meetings tend to be the ones that are easiest to measure, not the ones that matter most. Impressions. Clicks. Reach. Numbers that look good in a report but tell you very little about whether your brand is actually growing, or whether your marketing is building anything that lasts.

This study is designed to change that conversation. Google and Tracksuit combined their data to connect brand awareness, one of the most important but hardest-to-defend metrics in marketing, directly to share of search - a measurable signal of real commercial intent. Not what people saw. Not what they clicked. What they actually went looking for. Because when people know and trust your brand, they don't search the category. They search for you. And that's not a vanity metric. That's demand.

> Research from Les Binet has shown a strong correlation between Share of Search and market share, with changes in Share of Search often preceding shifts in market share by 6 to 12 months, making it one of the most reliable leading indicators a marketer has.

This study connects the dots between brand awareness, share of search and market share, putting a number on the commercial return of brand investment. The conclusion: Invest early.

For brands at 30% awareness, every 5 points gained in brand translates directly into 5 points of Share of Search. Like all great investments, the earlier you commit to brand, the greater the return.

The Study

We analyzed 31 brands across 15 categories in Australia and New Zealand between July 2024 and June 2025, combining two data sources:

Tracksuit Brand Health Metrics:
Always-on tracking of Awareness, Consideration, and Preference.

Google Search Data:
Indexed Share of Search for each brand within its competitive set.

Our goal was simple: understand why familiar brands get searched more, and what marketers can do about it.

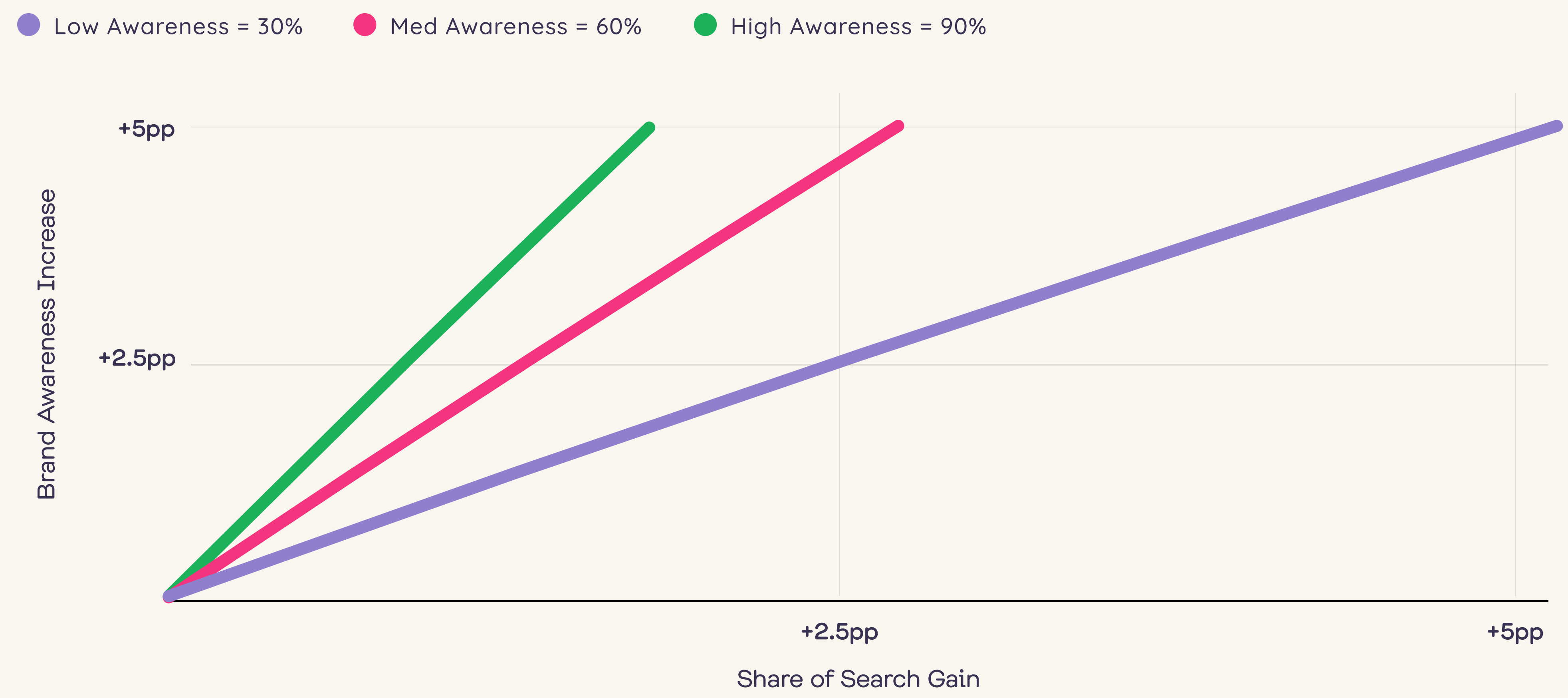
The Results

A strong brand doesn't just build mental availability, it shifts consumer behavior. When a brand earns a place in memory, it earns a place in search results.

Across Google and Tracksuit's combined data, brands with higher awareness consistently commanded a larger Share of Search, confirming a clear connection between brand health and commercial intent. Brand awareness, it turns out, is not a soft metric. It's a leading indicator of who gets found, considered, and bought.

More Awareness = More Share of Search

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



Bonus Finding: The YouTube formula the best brands already follow

In addition to the core study finding, we found that brands with higher awareness were more likely to be following established media planning principles, which in turn correlated with a greater Share of Search. These "Golden Rules"—rooted in extensive third-party research—cover fundamentals like achieving optimal reach and frequency, and also include strategic approaches to format and device mixes, consistent flighting, and broad targeting. While not a silver bullet, they are a clear formula for marketers seeking a full-funnel growth edge.

TL;DR The numbers behind the Rules

40%

Minimum weekly on-target reach for peak campaign effectiveness

2.7x

Median optimal weekly frequency on YouTube

Key Takeaways

1.

Early awareness investment delivers the highest return.

For brands at the lower to mid end of the awareness scale, every point of growth translates into meaningful, measurable behavioral change, in search, and ultimately in market share. Growth-stage and disruptor brands have the most to gain. Brand investment at this stage isn't a soft spend; it's one of the most commercially efficient things a marketer can do.

2.

High awareness is the gift that keeps giving, just differently over time.

Brands with established fame have already done the hard work of getting known. The priority for these brands shifts from getting known to staying front of mind, defending existing salience and keeping memory structures fresh in buying moments. When Share of Search stops rising in line with awareness, that's the signal to full-funnel execution, shifting investment toward influencing conversion at consideration and preference.

3.

For mature brands, growth lies at the fringes.

Rather than chasing overall awareness gains, high-awareness brands should focus on reaching new category entrants, lapsed users, and low-frequency buyers. These are your next customers. Pairing distinctive assets and category cues with expansive targeting and scaled reach is what wins their familiarity and ultimately, their buying moments.

The AI Era Makes This More Important, Not Less

This study is built on traditional search data and that's deliberate.

Traditional search gives us something AI-powered discovery currently can't: a long, consistent, measurable record of how consumer intent behaves over time. That's what makes the findings actionable rather than directional.

But the search landscape is shifting, and it's worth being direct about what that means. It means that Search is becoming more intelligent, more personalized and more agentic. According to Google, the platform processes over 5 trillion searches annually - and that number continues to grow even at this scale, with commercial queries rising year over year. The introduction of AI features like AI Overviews and AI Mode isn't just reshaping how people search; it's providing more highly qualified customers and leads than ever before. Google reports it's actively growing the overall search pie. More searches. More commercial intent. Higher stakes for the brands that show up - and the ones that don't.

> AI-powered platforms are changing how people discover, evaluate, and choose brands.
> The data to quantify that shift at scale is still maturing, but the direction of travel is clear.

Think about what AI search actually does: it surfaces one or two answers, not a page of options. No second page. No consolation prize for being the second-most-familiar brand in the category. If brand awareness drives search behaviour in a world of many links, the stakes are higher still in a world where AI accelerates the journey from discovery directly to decision

The underlying mechanism this study identifies doesn't disappear in an AI search world. It's likely to intensify. As AI search scales and its data matures, we'll measure whether the relationship holds, strengthens, or shifts.

Register your interest to be notified when we publish findings

The Bottom Line

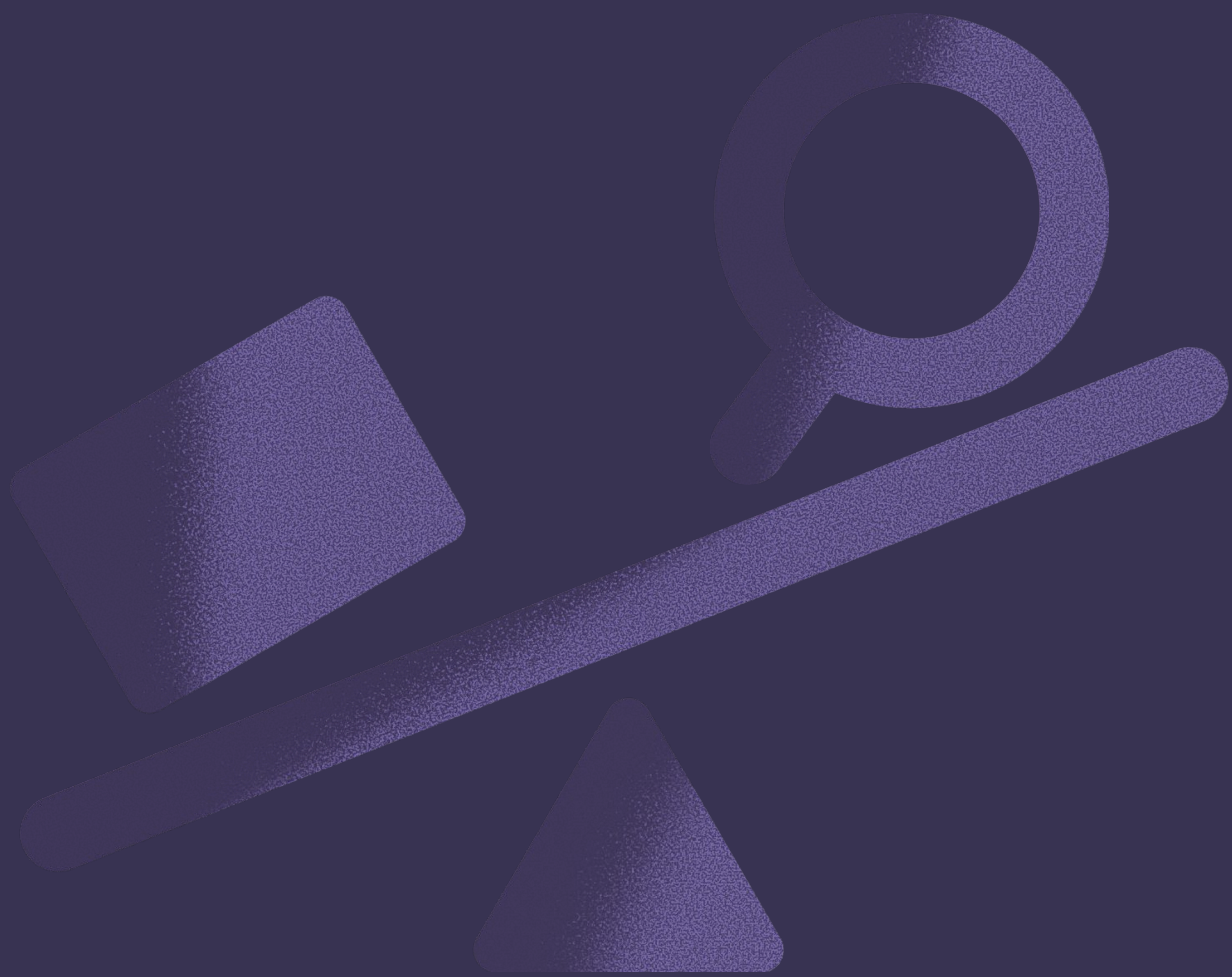
Stronger brands command a higher Share of Search, and ultimately, a bigger slice of the market.

Tracking awareness, Share of Search, and sales together over time creates a diagnostic chain. When growth stalls, you can see exactly where the breakdown is happening. Not enough people know you? That's a top-of-funnel problem. They know you but aren't searching? That's a consideration gap. They search but don't convert? That's bottom-of-funnel. Each has a different fix and now you have the data to find it.

The practical value here is timing. Share of Search shifts often precede market share changes by 6 to 12 months. That gap is what makes this useful: it gives marketers a leading indicator that sits ahead of revenue, long before results show up in a sales report.

Next time someone asks you to justify brand spend, you have an answer. Brand awareness drives share of search. Share of search precedes market share. The earlier you invest in brand, the greater the return. That's not a feeling. That's Return on Awareness .

That's Return on Awareness in action.



Return on Awareness