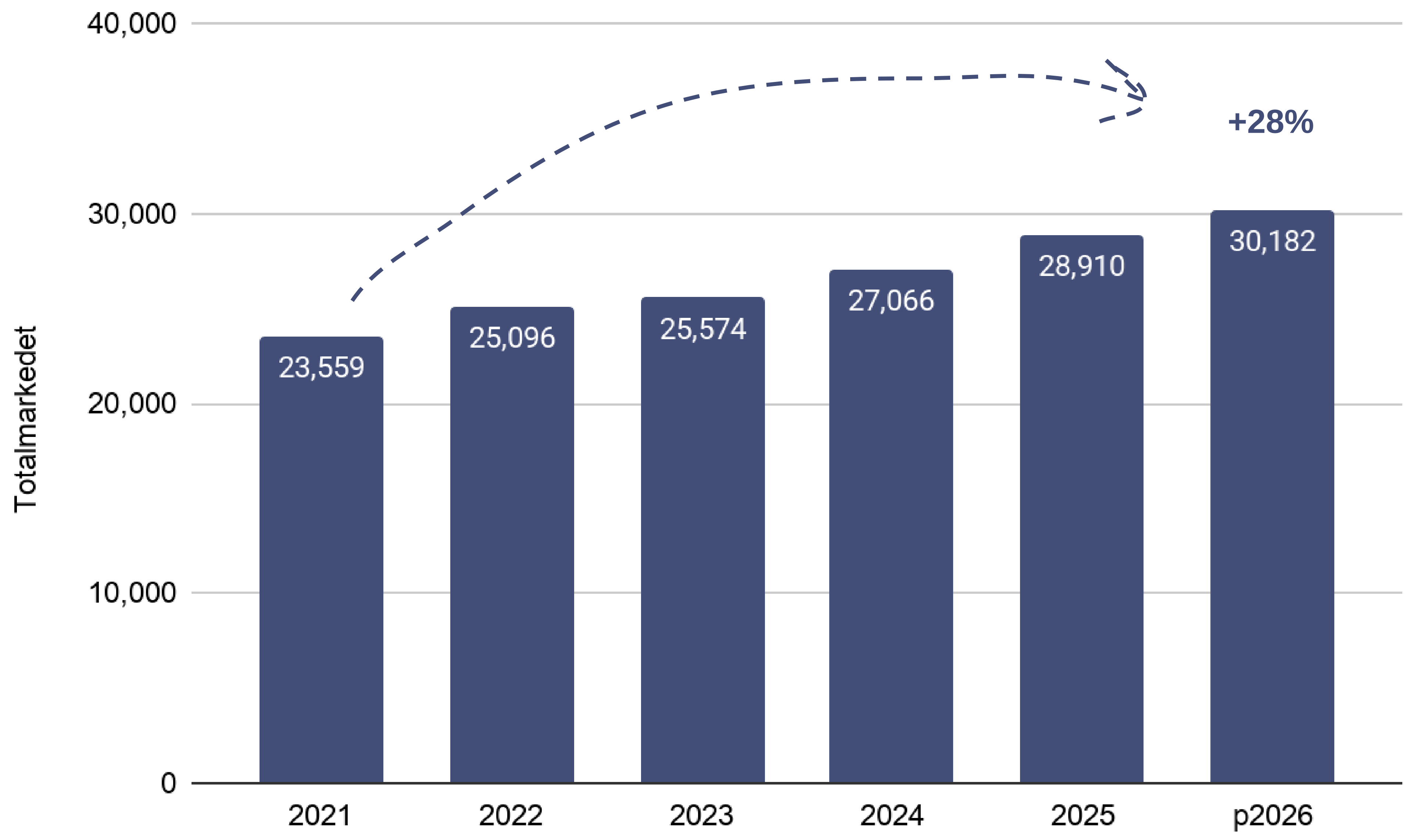
Når merkevaren gjør jobben, men Google tar æren



40,000
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Totalmarkedet
+28%
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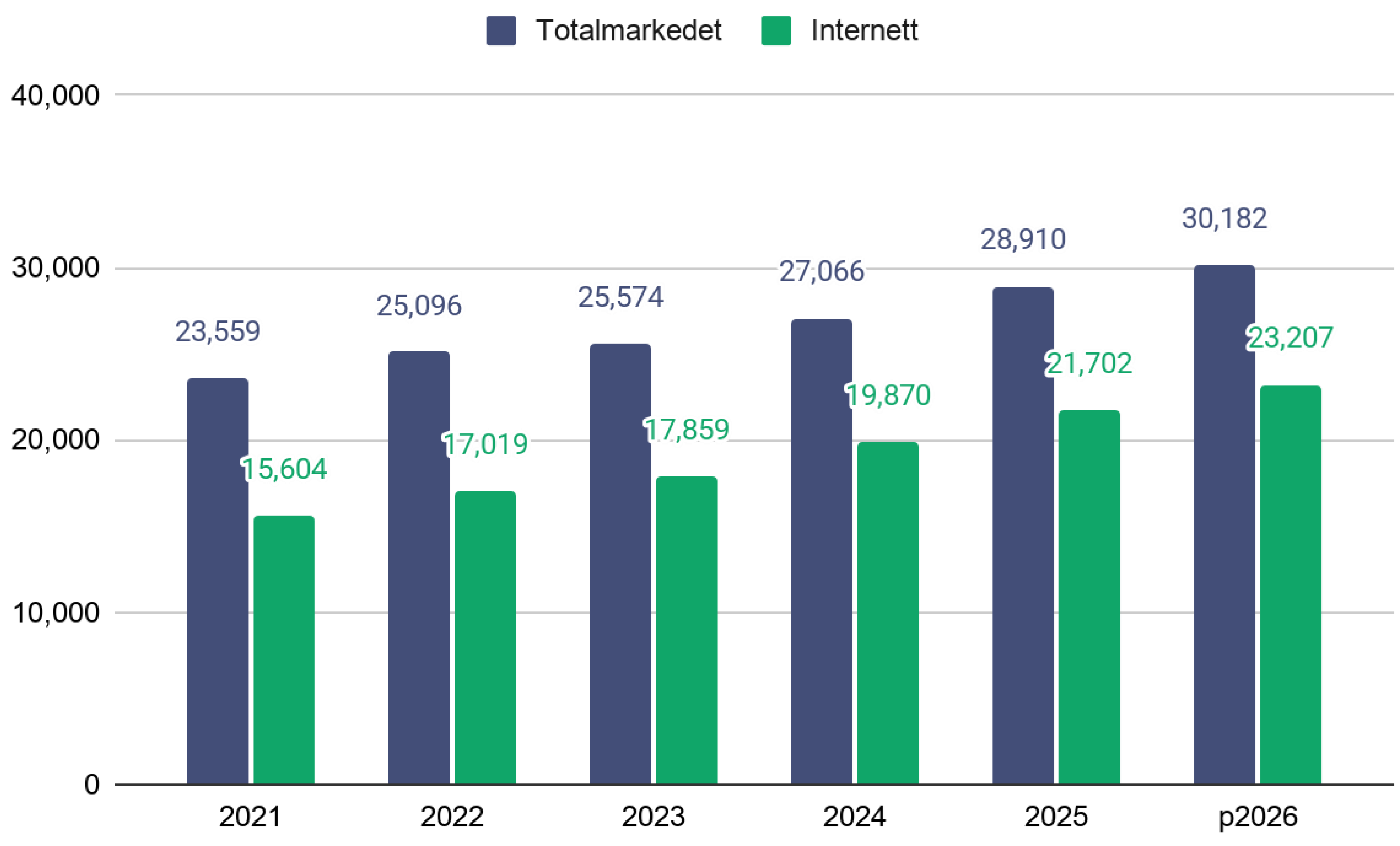

Totalmarkedet
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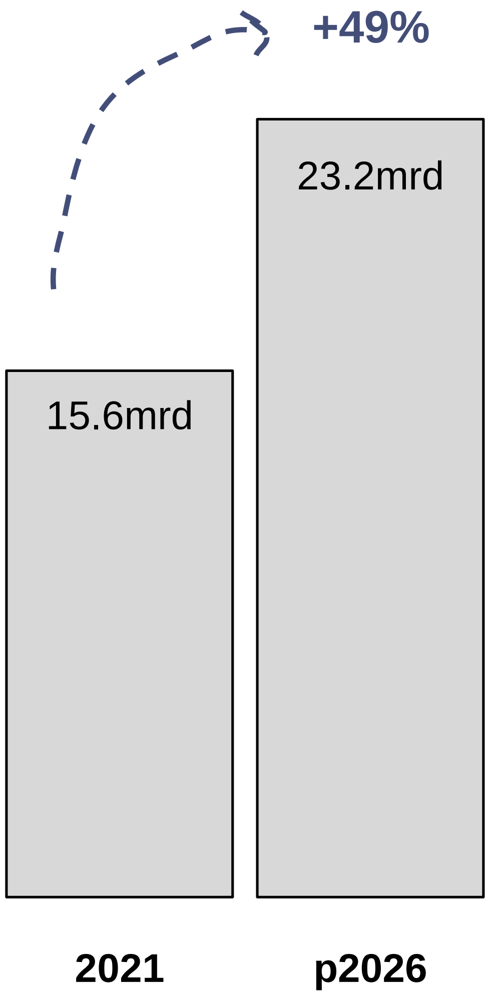
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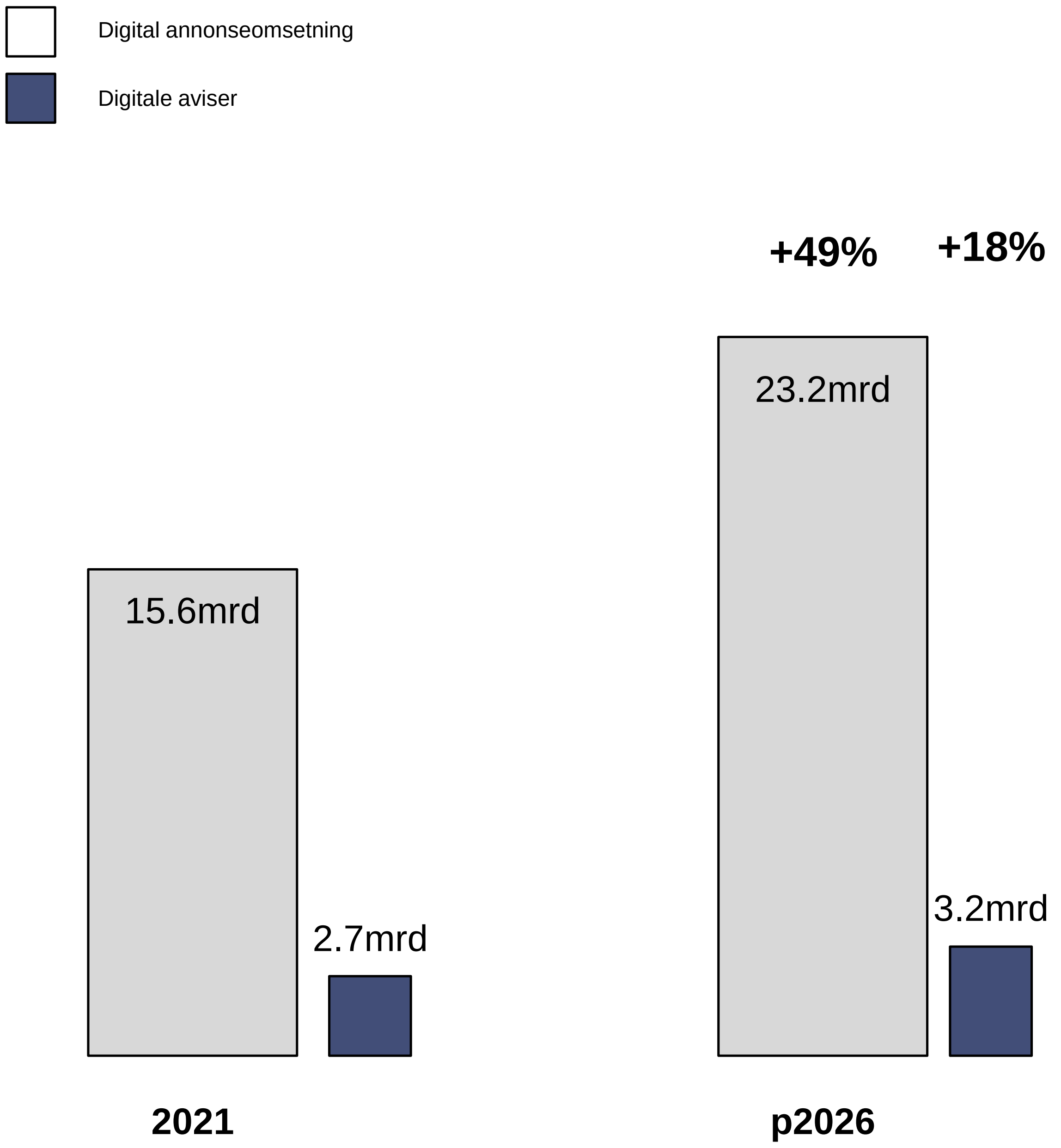
Digital annonseomsetning
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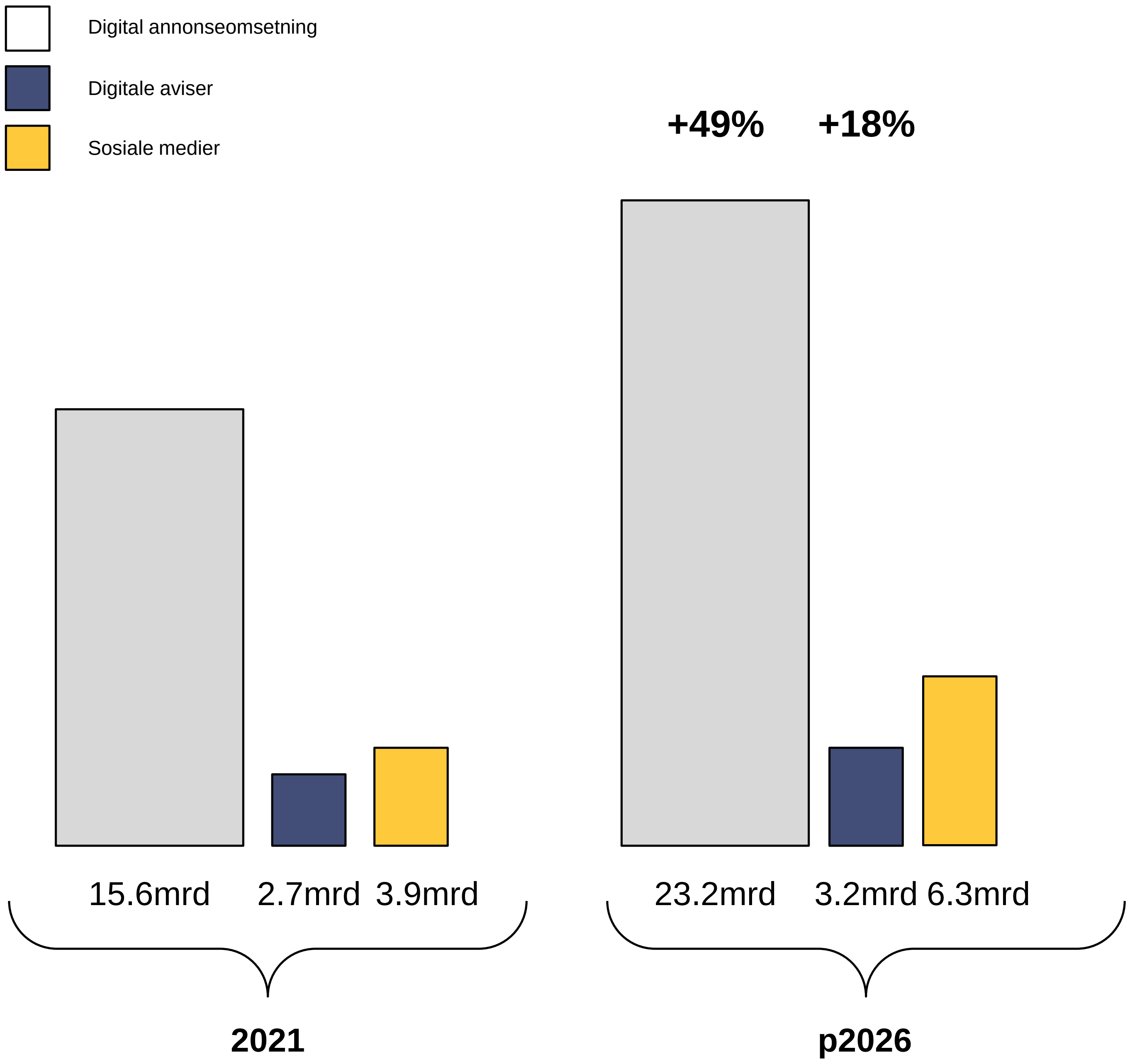
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p2026

Tar en større jafs: Google og Meta er størst, men også Snapchat og TikTok vokser kraftig. Til sammen legger de beslag på nesten halvparten av markedet. Foto: AP Photo/NTB

Nye sjokktall viser at tech-gigantene snart tar halve det norske reklamemarkedet

- Dette gjenspeiler hverdagen til forbrukerne, sier forhandlingsdirektør i GroupM, som står bak nye prognoser for Google, Meta, Snapchat og TikTok i Norge.

Annonsørfavoritter: Mer enn hver andre norske reklamekrone vil gå til én av disse fire i 2026. Foto: AP Photo/NTB

Tech-giganter sluker ny reklame-milliard: - Kan ikke stoppe dette toget

Nye prognoser viser at Google, Meta, Snapchat og TikTok vokser langt mer enn resten av markedet.


GLOBAL TECH BLEND
CLOSED ECOSYSTEM & DATA HARVEST
INGREDIENSER FRA: GOOGLE, META, SNAPCHAT, TIATOK
COOGLE
META
SNAPCHAT
TIKTOK

The commercial power of brands in the digital world

Evaluating the effect of the brand in online sales, and the efficiency of brand- and non-brand SEM-investments.

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skandia:
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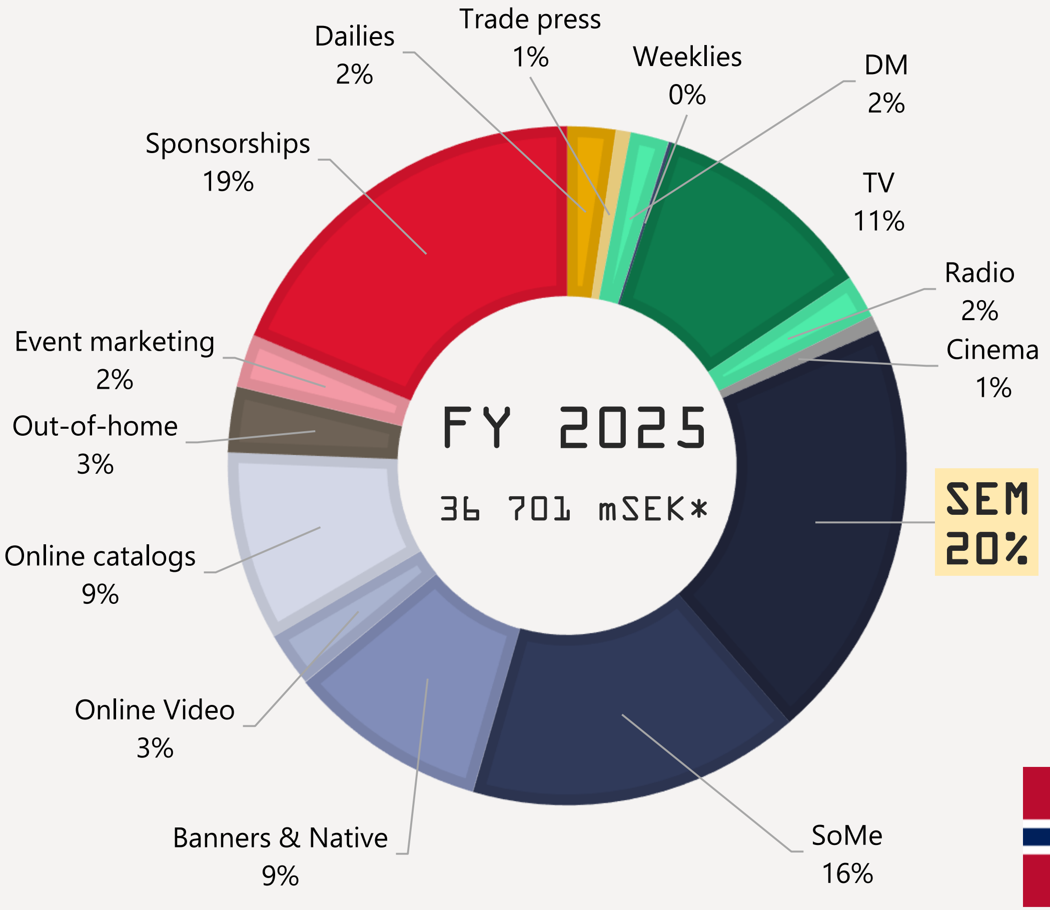
SCANIA

Project context

Background and purpose

- Neutral study on brand impact on online sales and SEM efficiency
- Helps reveal true costs and limits of SEM-centric growth
- Web analytics used to map drivers of traffic, conversion, and revenue
- Our aim is not to claim “non-brand or “brand”-traffic as good or bad. Both play distinct roles in the journey. The point is to understand what truly drives volume and value, and when search is capturing category demand versus when the brand is doing the heavy lifting to convert.

Increasing investments in digital platforms



* Source: irm-media.no

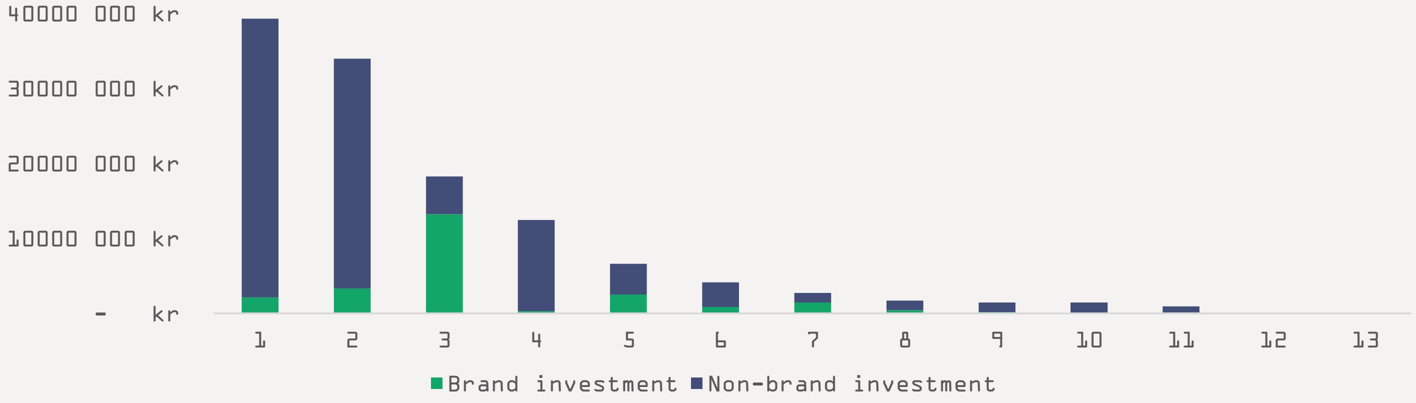
Project context

Participating companies

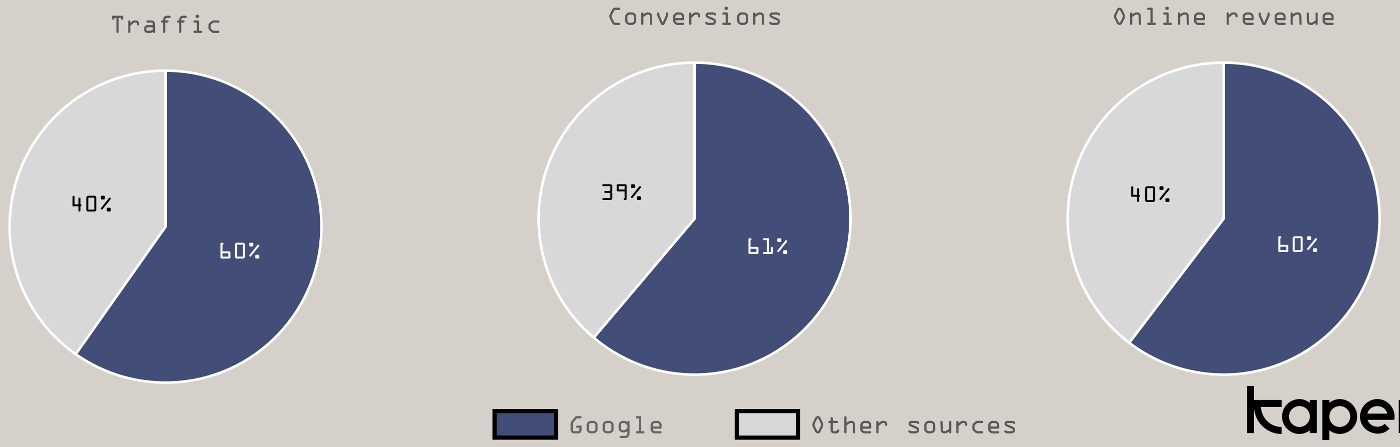
- Norwegian, well-known brands across categories (B2B & B2C)
- Varying maturity levels and funnel shapes
- Clear on-site conversions + mixed sales channels (online included)
- Period: Full-year 2024 (plus selected cuts for seasonality/campaign effects)

Participating companies	Total Google Ads investment	Google Ads non-brand investment
13	123 MNOK	80%

Google Ads investment for participating companies



How much impact does Google have on companies' websites, from a Google perspective?



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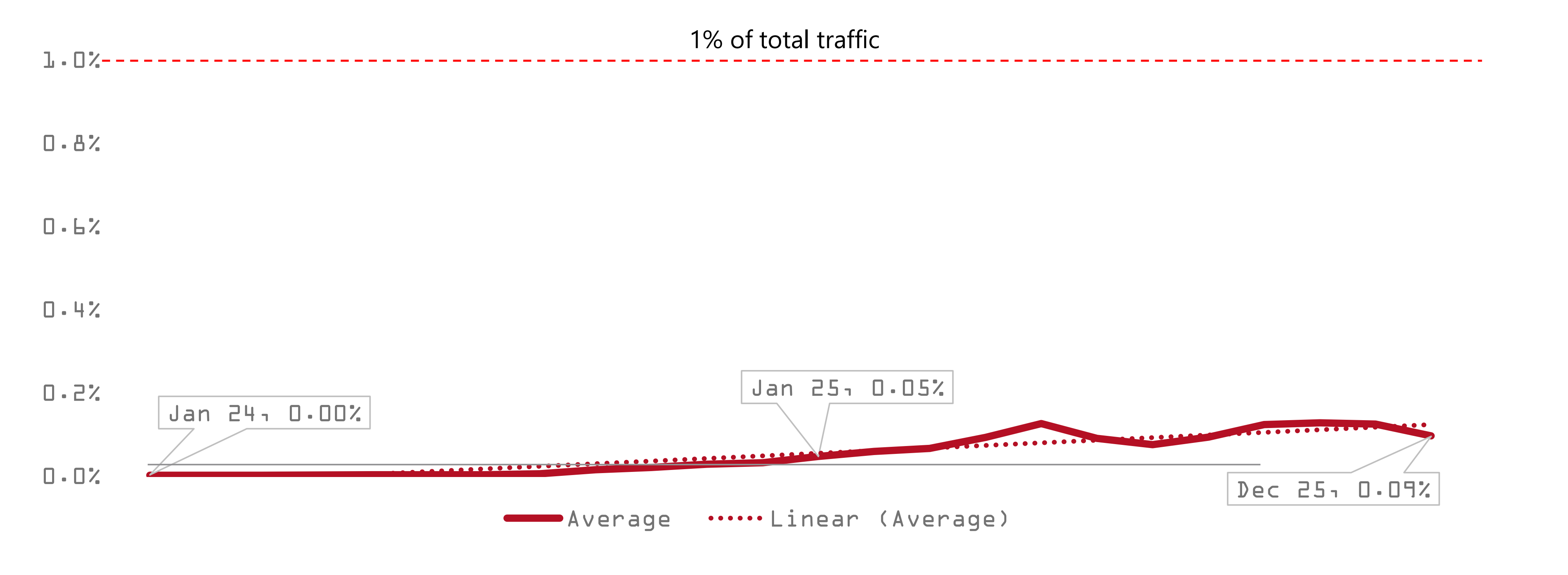
Project context

Traffic from AI assistants

Impact of AI assistants

For 7 of 13 participating companies, we have had access to GA4, and have been able to track the impact of AI referral traffic over time.



Methodology

How do visitors reach your website?

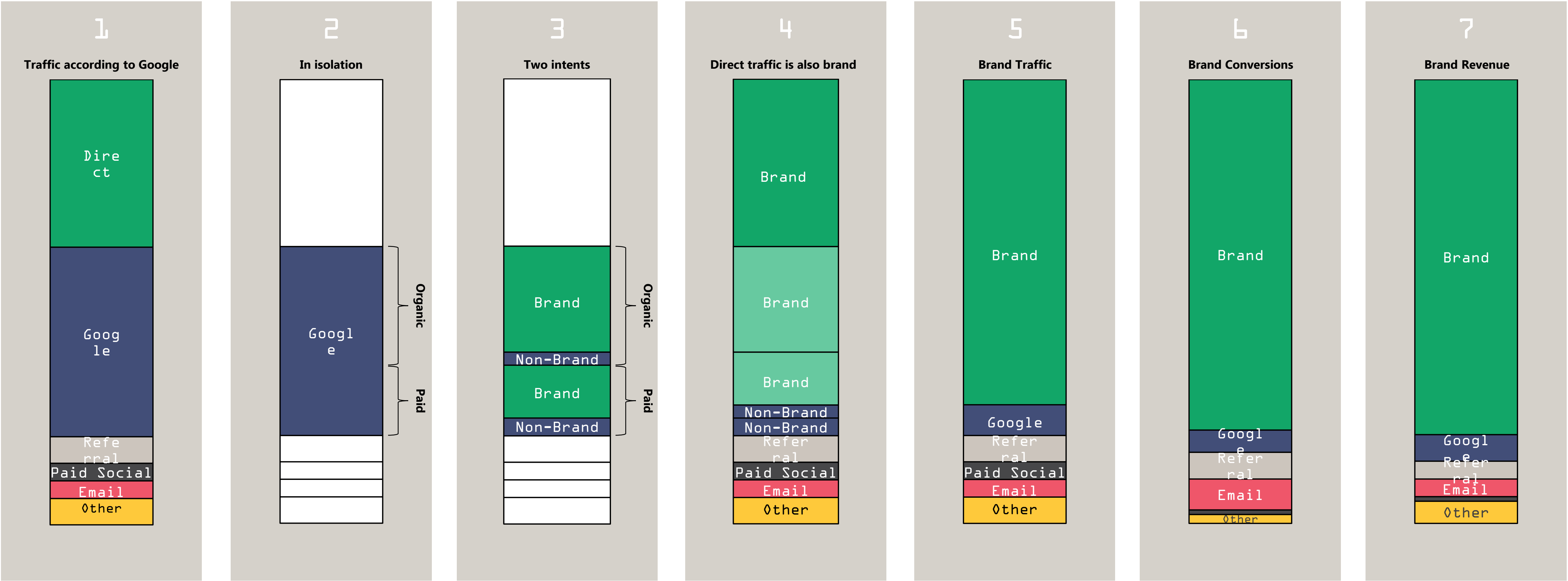
	Via search (Google, Bing, AI assistants, etc.)		Via other sources
	Organic (non-paid)	SEM (paid)	
Brand	Searched on a brand word and clicked on a link (SEO)	Searched on brand word and clicked on an ad link (SEM)	Typed in the brand's website directly in browser
Non-brand	Searched on a non-brand word and clicked on a link (SEO)	Searched on a non-brand word and clicked on an ad link (SEM)	Clicked on links in other channels (e-mail, social media, other sites, etc.)

Data sources used in the study

- Web analytics data (GA4, Adobe Analytics, etc.) for total traffic, conversions, online revenue and time periods.
- Paid keyword data (Google Ads, Bing Ads, etc.) to split paid performance by Brand/Non-brand.
- Organic keyword data (e.g., Search Console) to determine the share of brand search performance.

Methodology

How to analyse online brand effect



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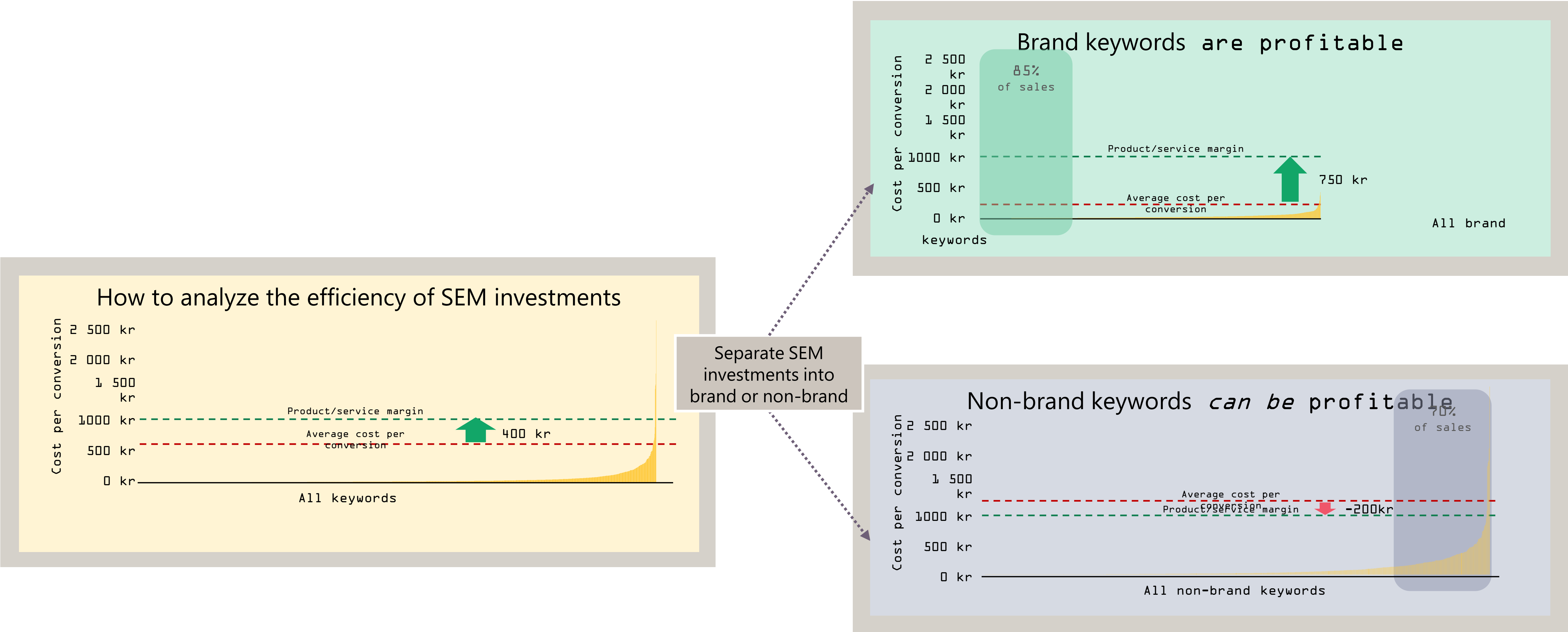
Methodology

SEM efficiency



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Results from the study

All companies: need to compare like with like

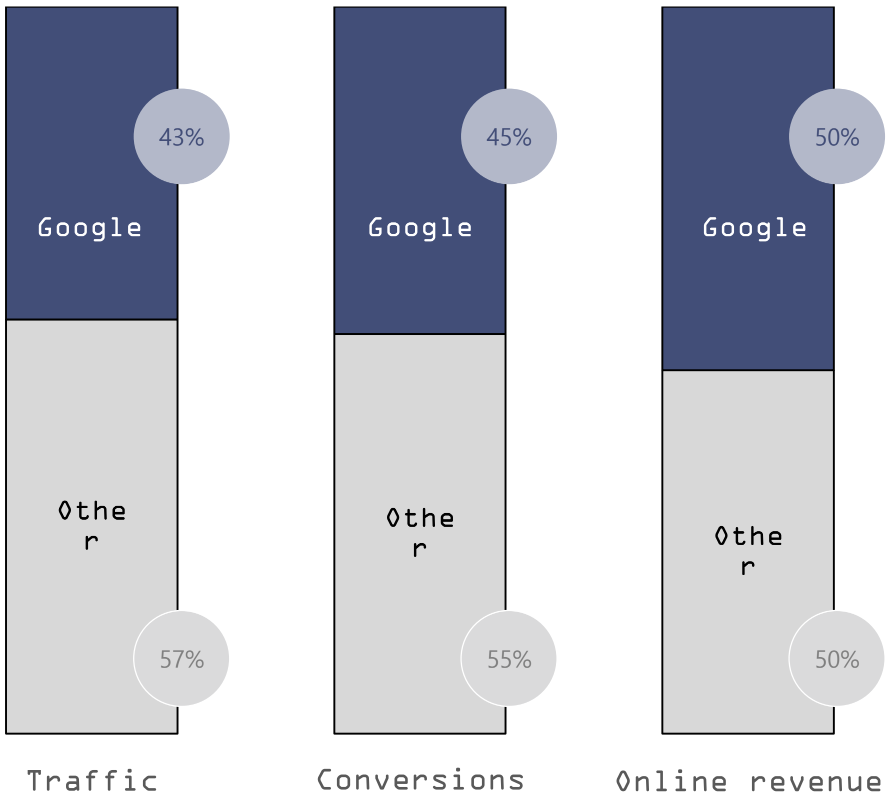
Results from the study

Brand analysis of traffic - clustered

Results from the study

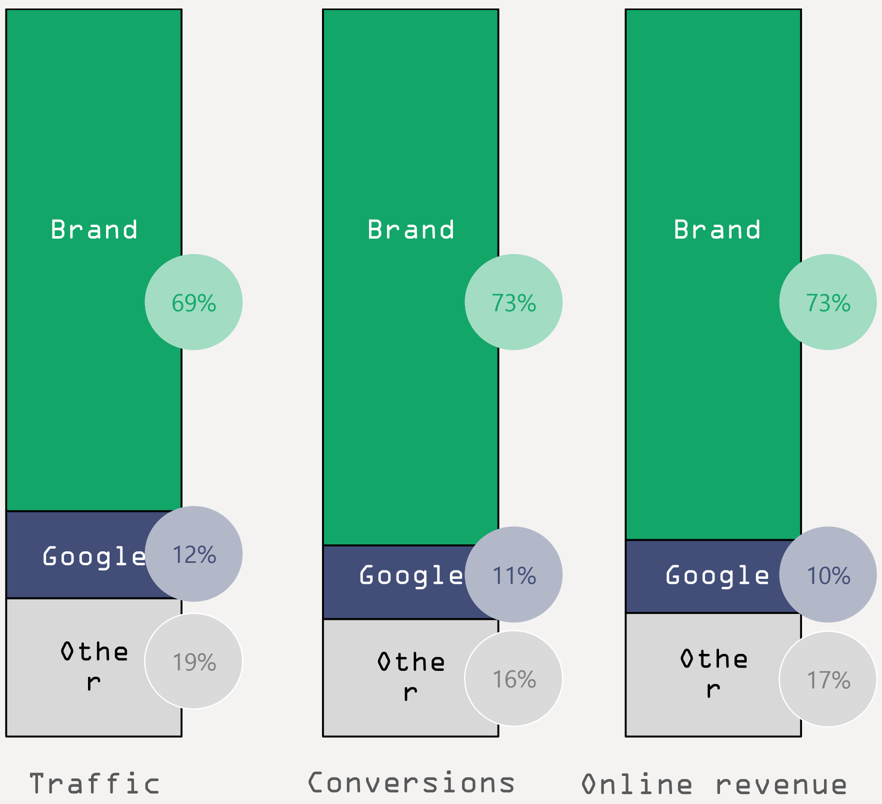
Subscription Services

From Google's perspective



- 3 subscription companies across stable Norwegian categories
- 2 established leaders + 1 newer challenger
- Google is the largest driver of traffic, conversions & online revenue (paid + organic)

From a brand perspective

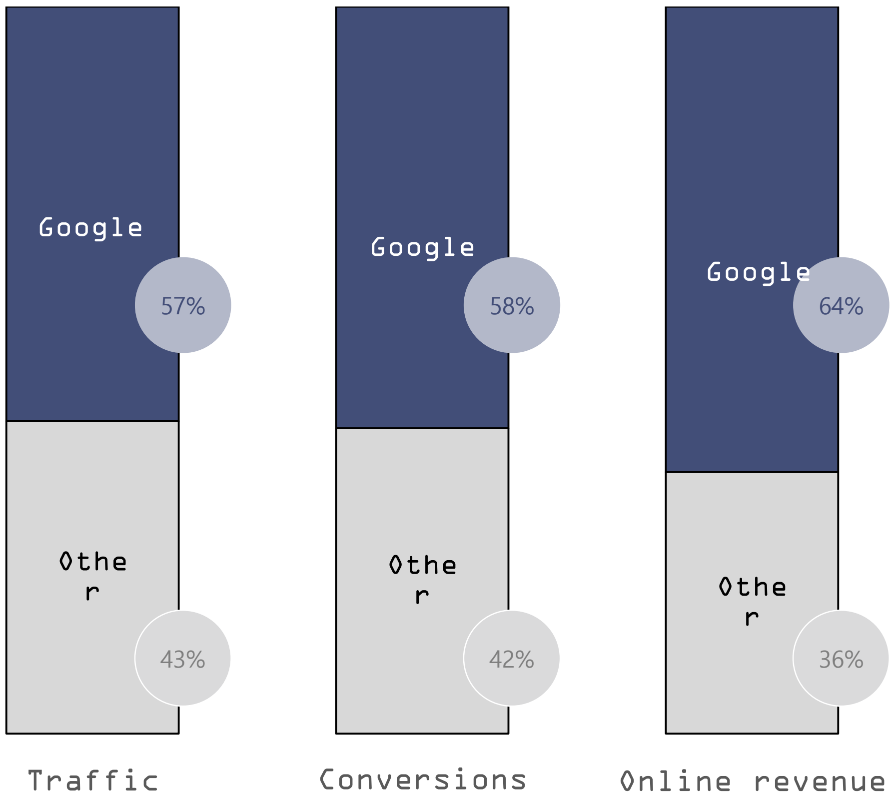


- Brand traffic drives the majority of volume and value across all three brands
- Non-brand has limited impact and lower conversion rate
- Paid non-brand cost per conversion is 3–19× higher than paid brand CPA

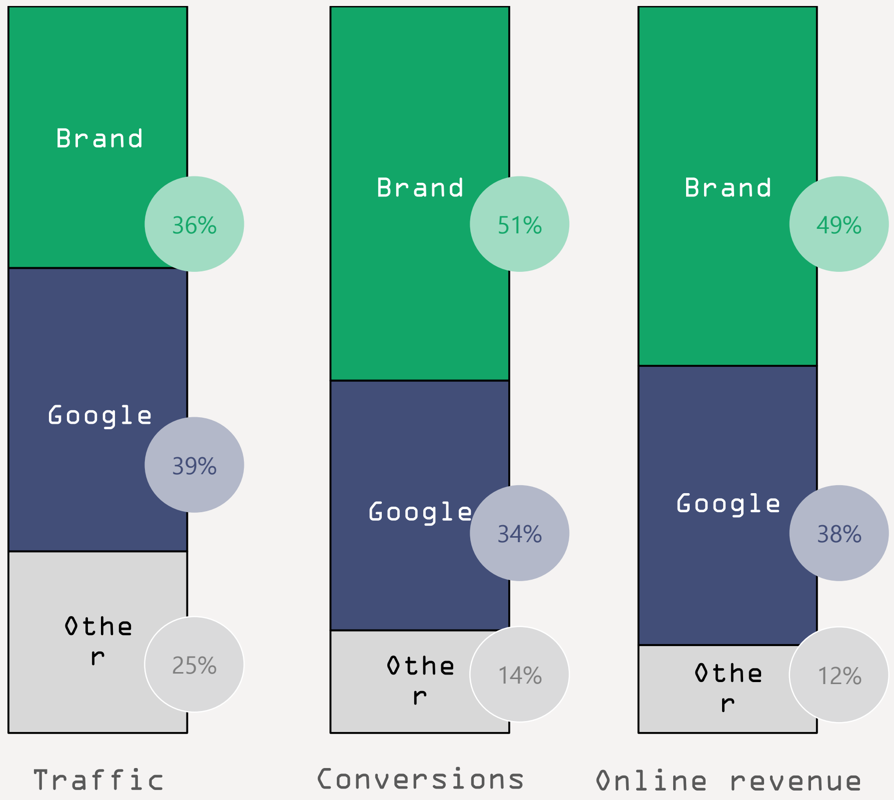
Results from the study

Retail B2C

From Google's perspective



From a brand perspective



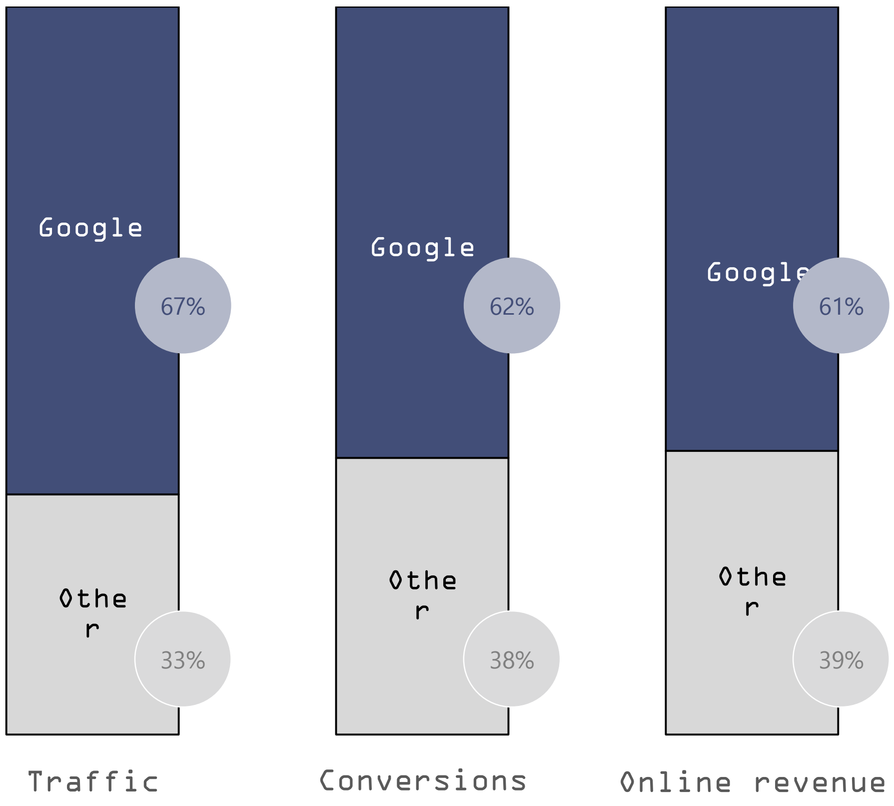
- 4 B2C retail brands with strong recognition in Norway
- Omnichannel: digital + physical (3 transact online, 1 does not)
- Largest source: Google (paid + organic) for traffic, conversions & online revenue

- Brand and non-brand traffic volumes are comparable – but brand converts more and contributes more revenue
- Non-brand share is higher than other clusters (investment + product search behavior)
- Brand delivers higher efficiency and value per visit

Results from the study

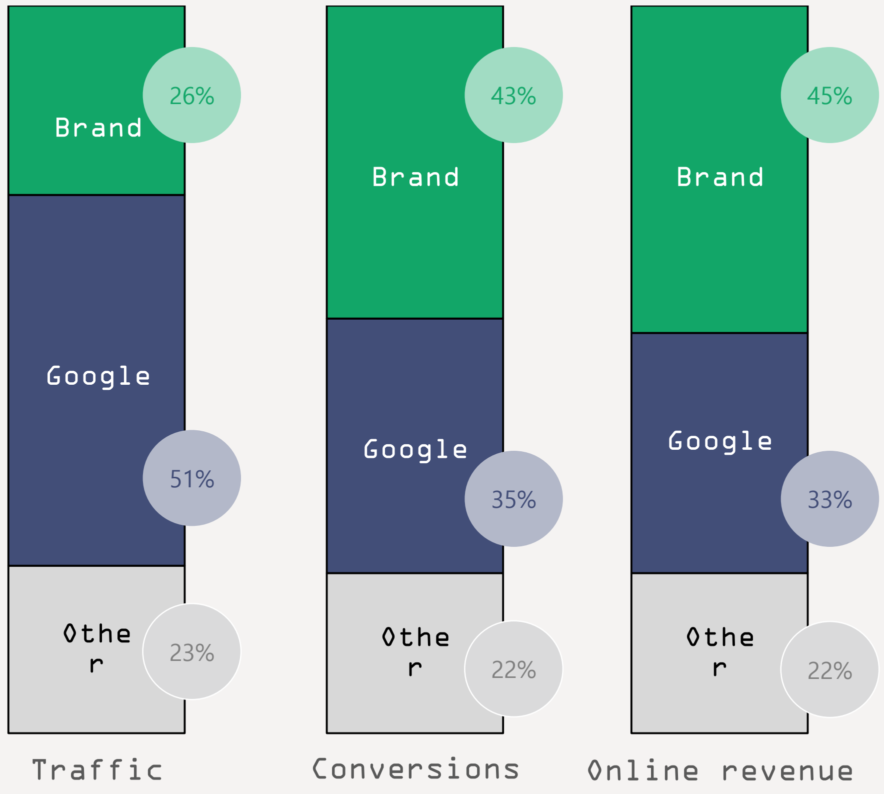
Retail B2B

From Google's perspective



- 2 B2B retail brands with strong recognition in Norway
- Both transact online; one purely online, one omnichannel (stores + e-commerce)
- Google converts lower than other sources, yet still drives most conversions & online revenue

From a brand perspective

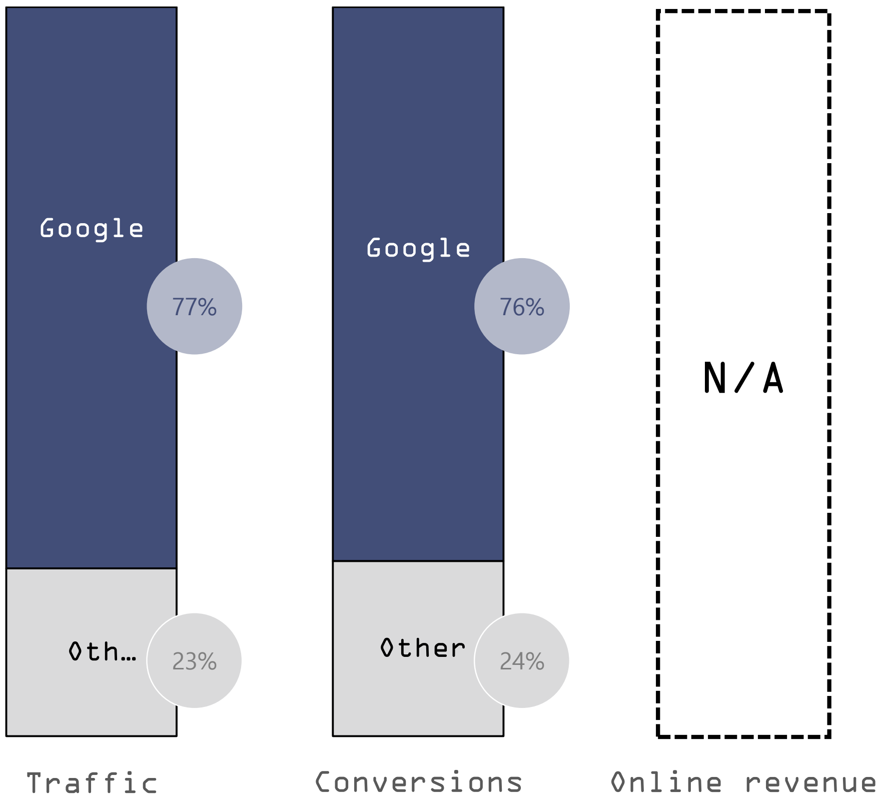


- Brand traffic volume is much lower than non-brand... yet drives higher conversion & revenue share
- Non-brand share is elevated (investment + product-search behavior)
- B2B retail performance depends heavily on brand strength - not only non-brand search

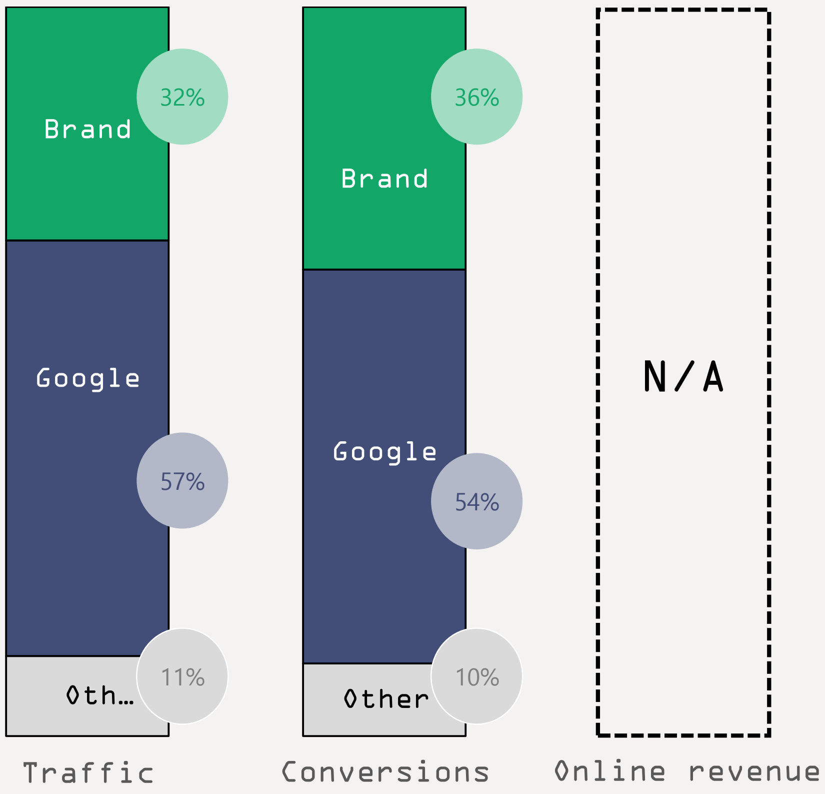
Results from the study

Via resellers

From Google’s perspective



From a brand perspective



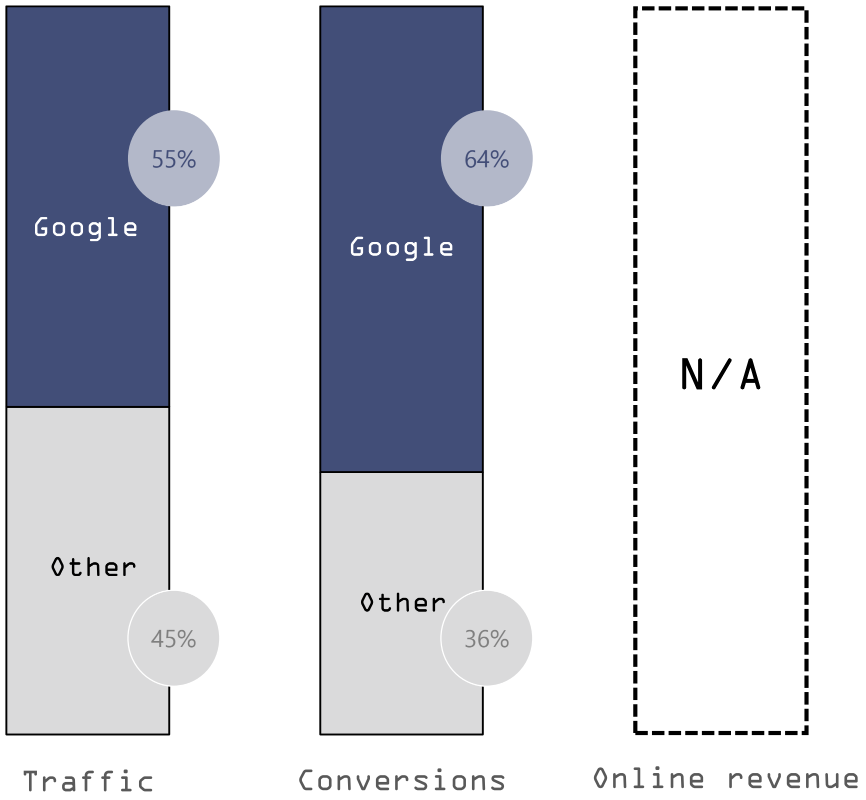
- 3 companies selling primarily via resellers (online/offline)
- Only one has meaningful paid search investment; others are minimal
- Revenue analysis limited: only one sells and tracks revenue on-site

- Lower brand traffic due to weak link/interest in the parent brand
- Brand volume is smaller, but conversion rate and share are still higher
- Heavy SEM investment is often questionable - it can disrupt the customer journey

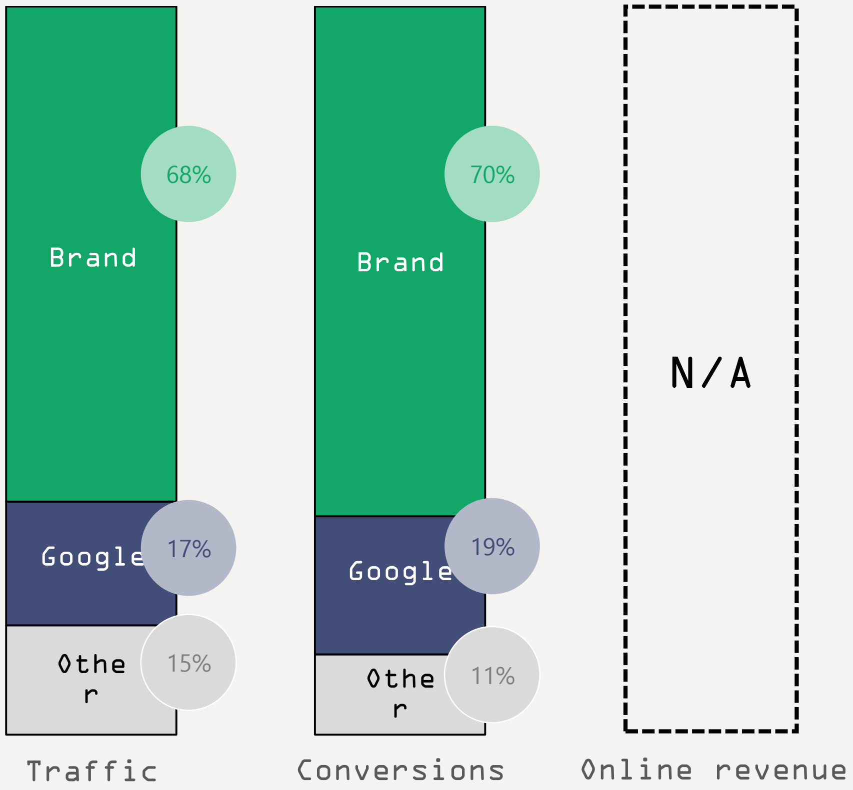
Results from the study

Corporate communications

From Google's perspective



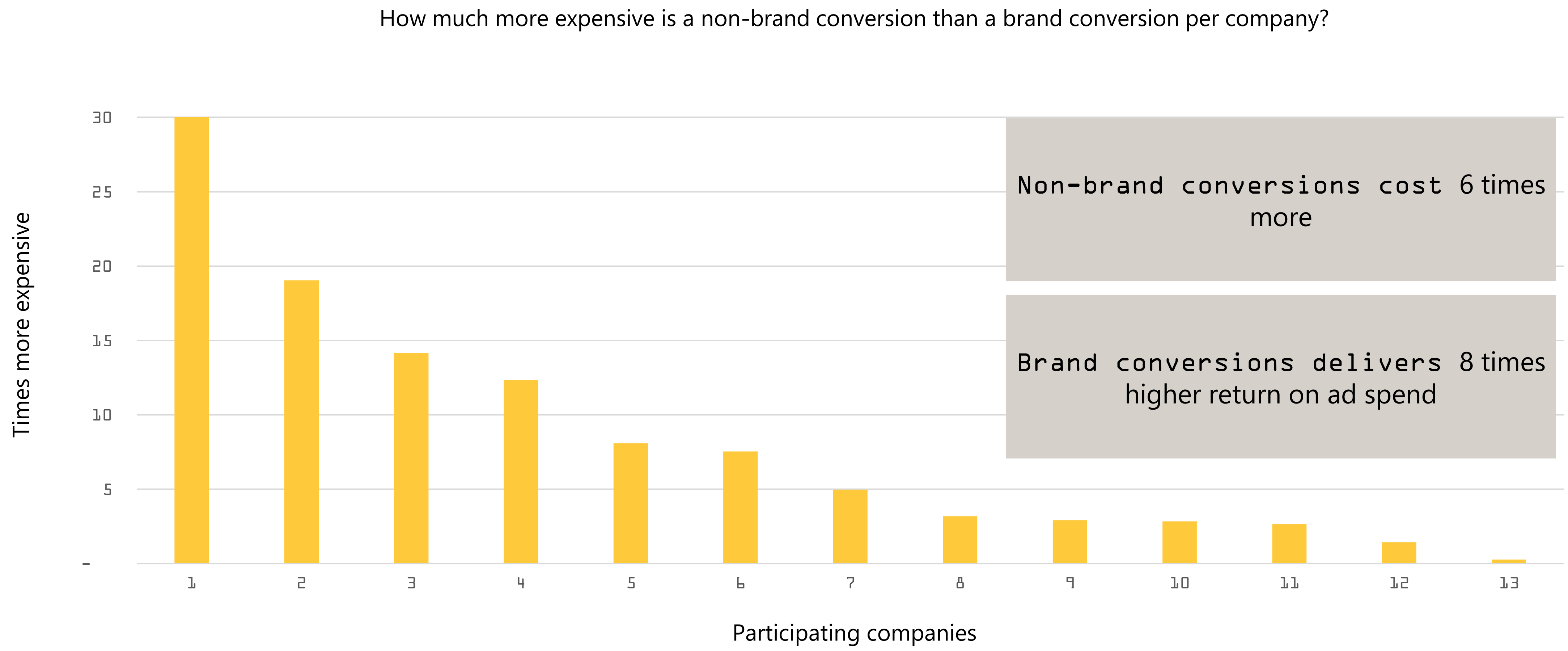
From a brand perspective



- Single organization; website mainly serves as a public-facing window
- Focus on identity, mission, leadership & accountability (not transactions)
- Most traffic and conversions come from Google (paid + organic)

- The impact of the brand on website traffic is significant.
- This also shows us Google's actual impact when brand words are not included, which is limited yet maintains an above average conversion rate.

Cost per conversion brand vs. non-brand



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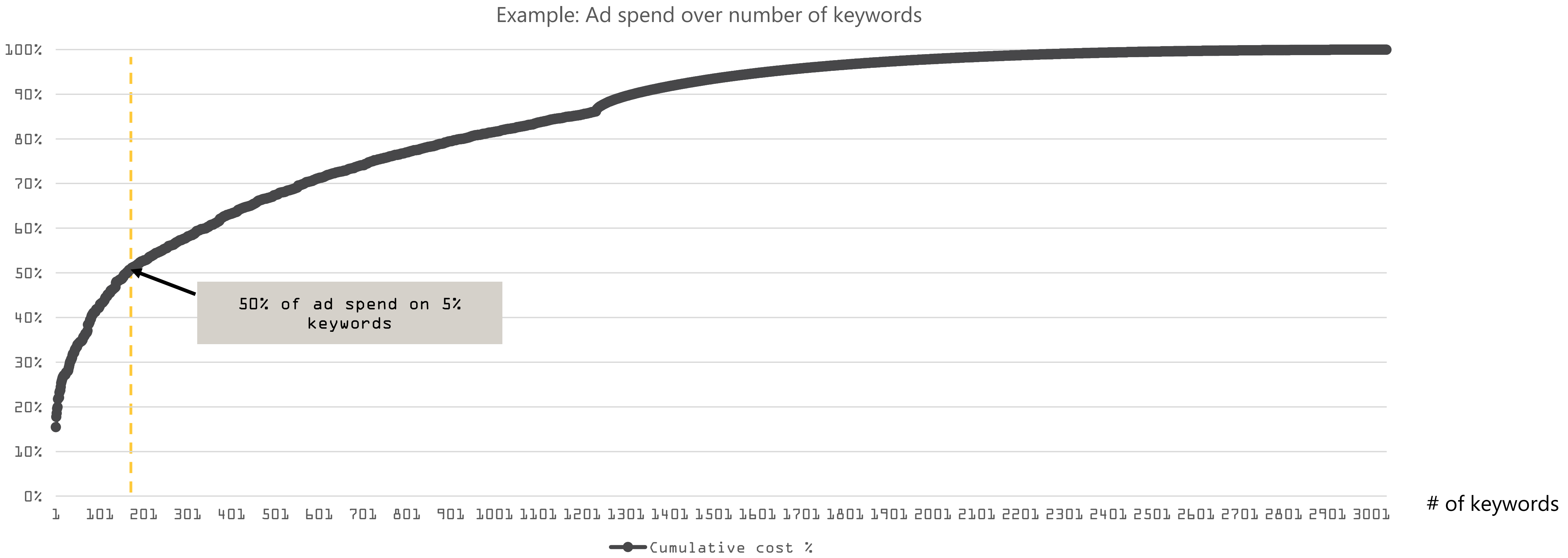
Cross-company analysis

Return on Ad Spend in SEM



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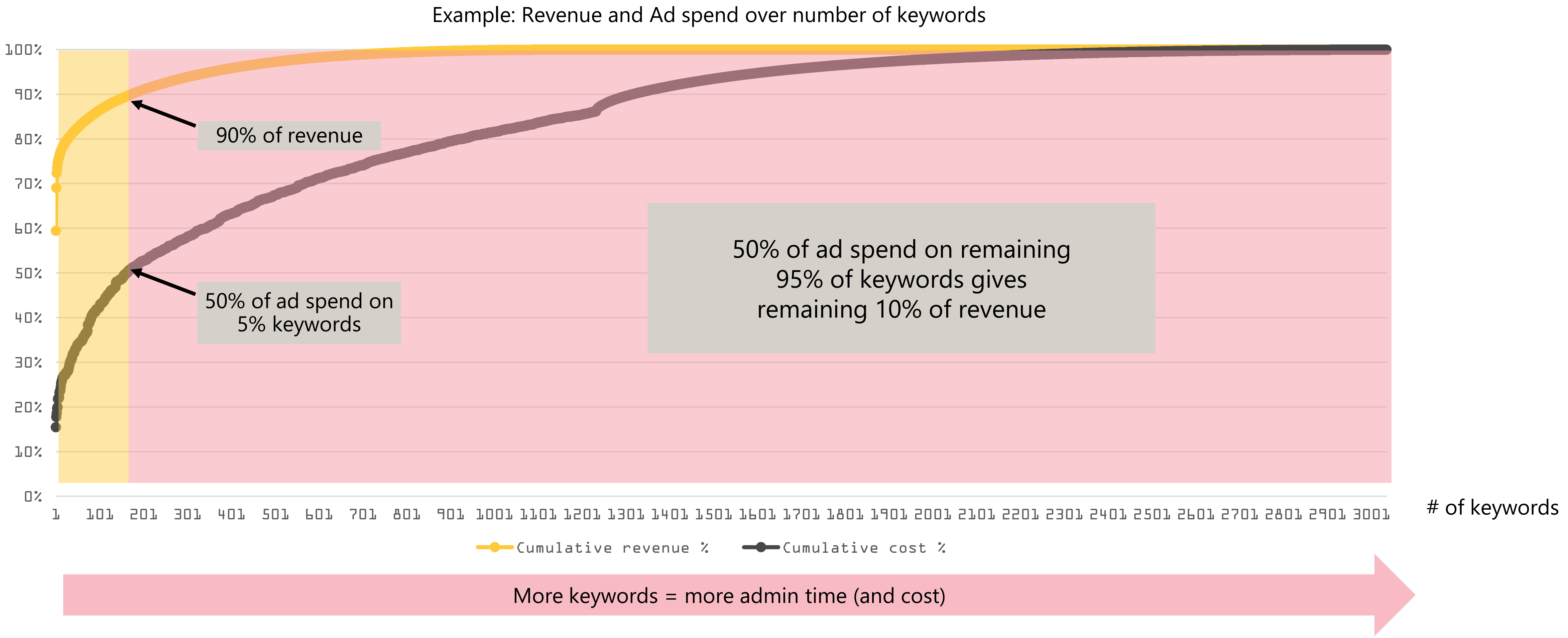
Cross-company analysis

Return on Ad Spend in SEM



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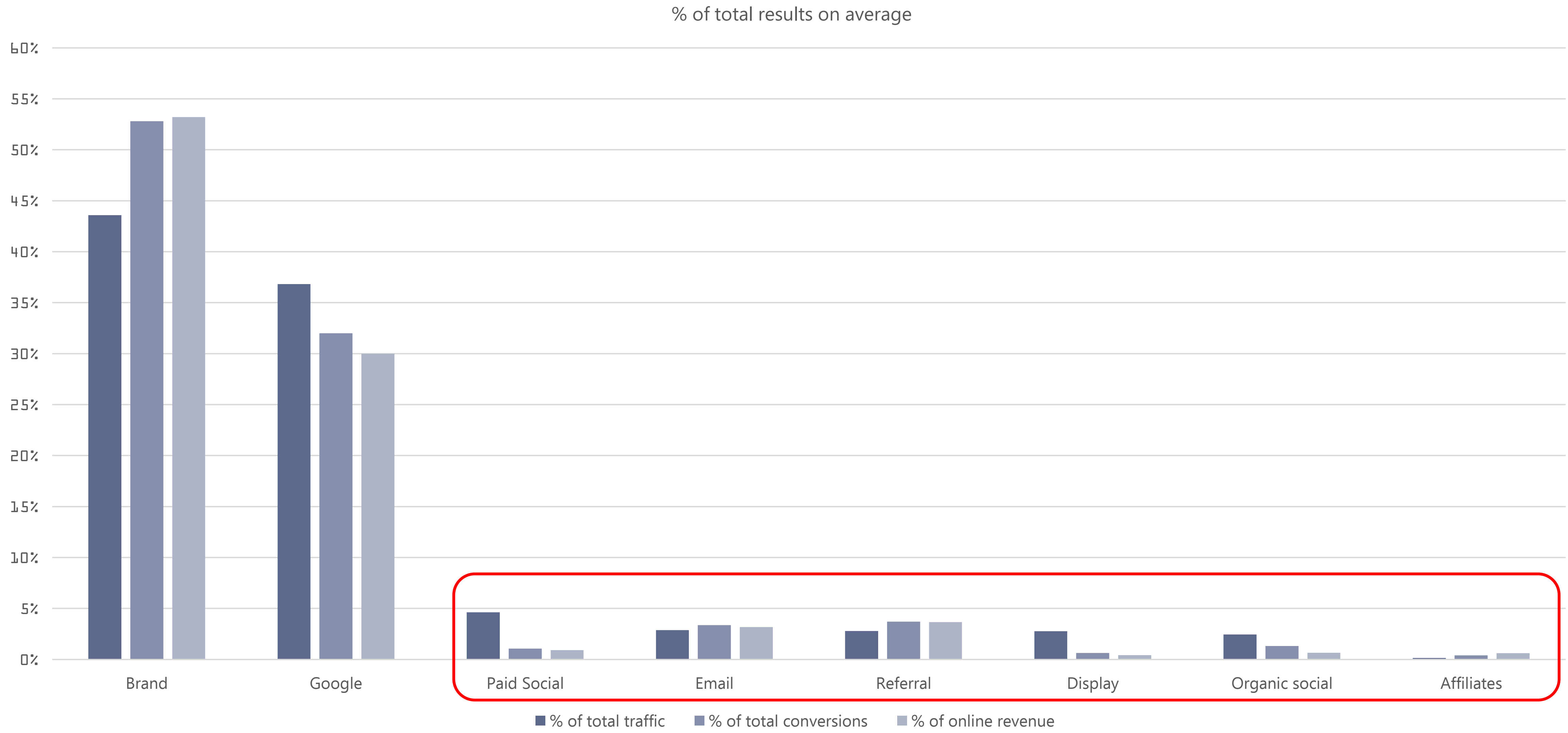
Cross-company Analysis

Contribution across all sources



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The brand is the main driver of online traffic, conversions and revenue

Key insights: Brand effect

- Most companies invest heavily in SEM & SEO, but the true impact is often unclear
- Brand-search measurement reveals the brand's real contribution to sales outcomes
- Brand searches drive most traffic, conversions & revenue
- Traditional analytics can over-credit Google as the driver of results
- AI search: detectable, but not yet material for performance

Key insights: SEM efficiency

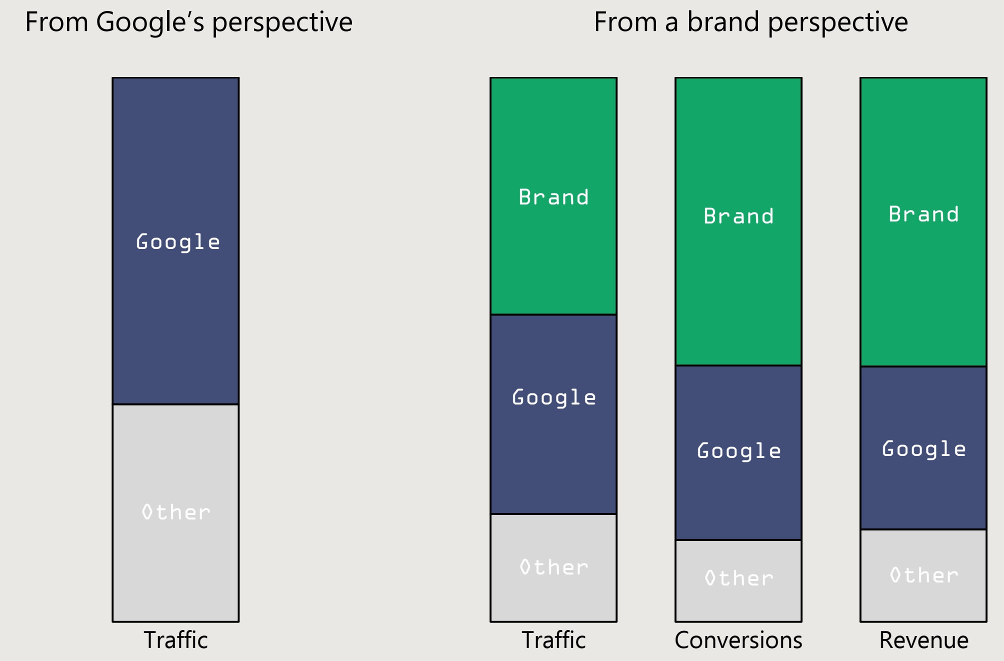
- Separate brand vs non-brand to assess true efficiency
- Brand SEM typically shows lower cost per conversion than non-brand
- In competitive categories, only brand traffic delivers positive average margin
- Sustainable growth is therefore closely tied to growing brand demand
- Bottom line: strong brand = profitable online business

Key actions

- Track brand traffic over time as a business KPI linked to sales growth
- If you plan to scale SEM, validate at keyword level to avoid margin erosion
- Run a company-specific analysis - patterns are clear, but realities differ

There is both money to be made and to be saved.

Study conducted on 13 well known Norwegian companies in different business categories



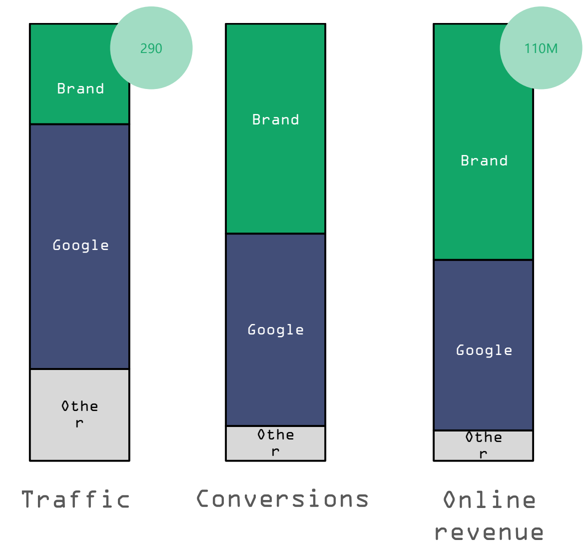
Average ratios from the study in Norway. In reality, the ratio varies between clusters and businesses.

Applications for the marketing department

By applying a brand perspective to web traffic, conversions and online revenue – and following up on this over time - there are several benefits for today's marketing departments.

1. The (monetary) value of brand explained
   - Quantify brand contribution to sales over time
   - Translate brand investments into C-level financial logic
2. Holistic budget allocations and steering
   - A strong brand is critical for profitable online performance
   - Use measured brand impact to allocate spend toward business objectives
3. Improved internal cross-discipline collaboration
   - Align specialists (SEO/SEM/brand/performance) on one shared truth
   - Reduce fragmentation and increase overall efficiency and effect

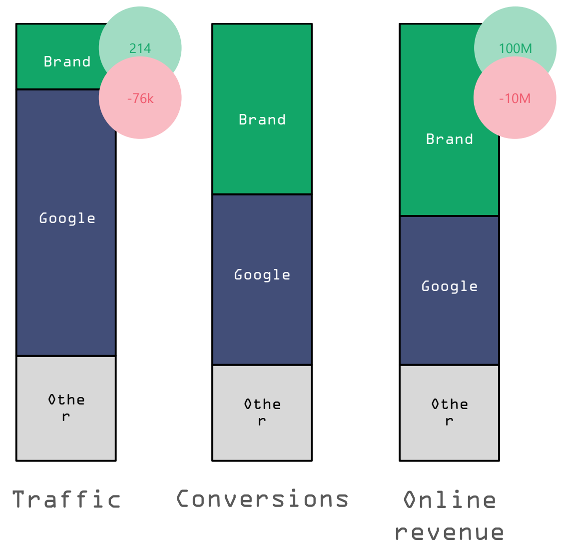
2024



In the example above, a company followed web traffic and conversions from a brand perspective starting in 2024.

In 2024, the company had 290k visits from brand traffic, generating 110M in revenue.

2025



The company followed brand traffic and conversions over time and saw a decrease in brand traffic of -76k visits year on year. Indicating a worsened brand position in the market.

The online revenue from brand traffic was 100 M, a decrease by -10M year on year. .

The financial impact of the worsened brand position was in this case -10M as the company operates an online only transaction model.

Implications in this case were amongst others a review of the marketing budget allocations.

Want to read the full report?

Scan the code!