










The link between search and sales in nine categories



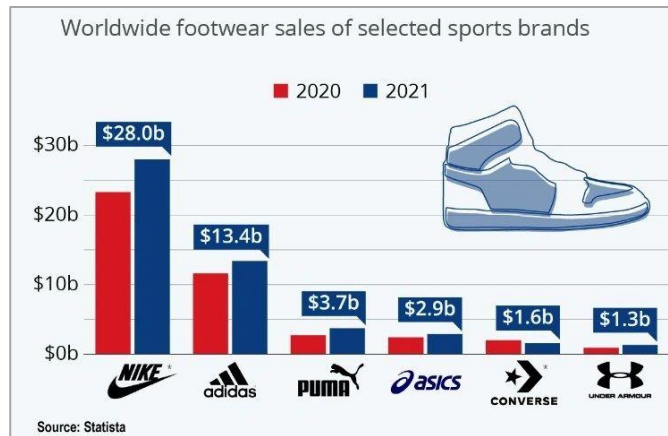
SHARE OF SEARCHING USE EXAMPLES

The link between search and sales

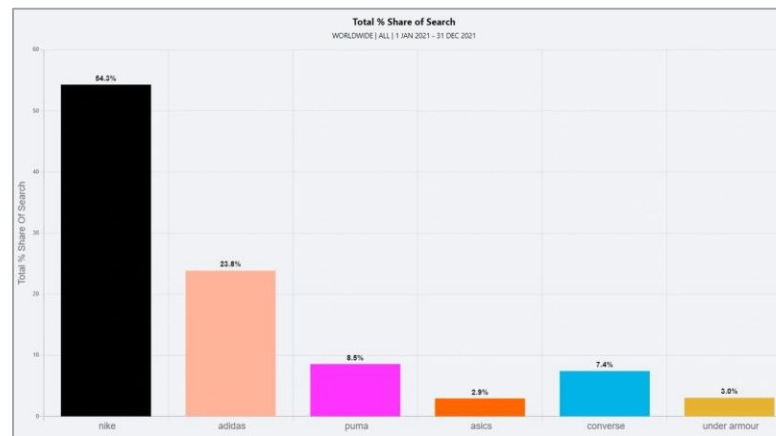
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ATHLETIC FOOTWEAR – THE LINK BETWEEN SEARCH AND SALES

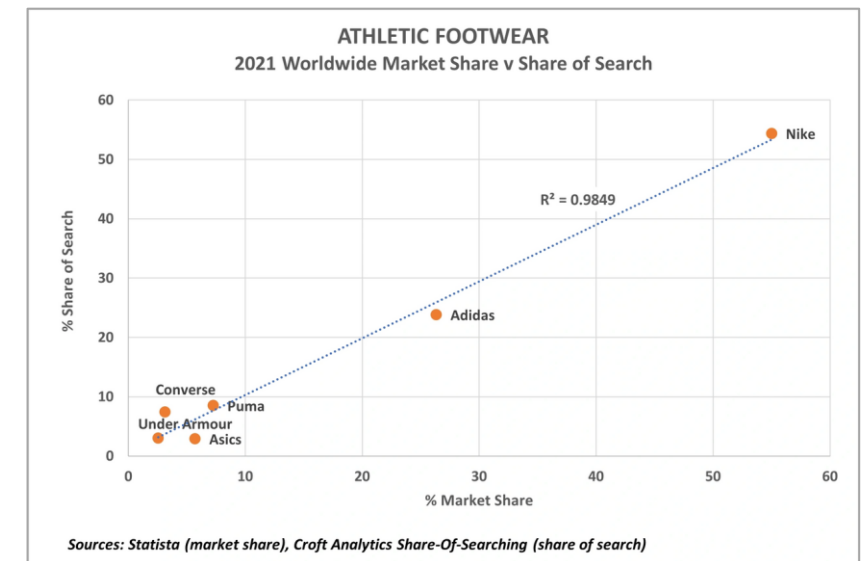
This chart from Statista shows global sales for athletic footwear brands in 2020 and 2021.



This chart from Share of Searching shows the global % share of search data for the same athletic footwear brands in 2021.



This chart compares global share of search and market share for athletic footwear brands in 2021 (using the Statista and Share of Searching data). It shows there was a **.98 r-squared** coefficient of determination between share of search and market share for these brands.

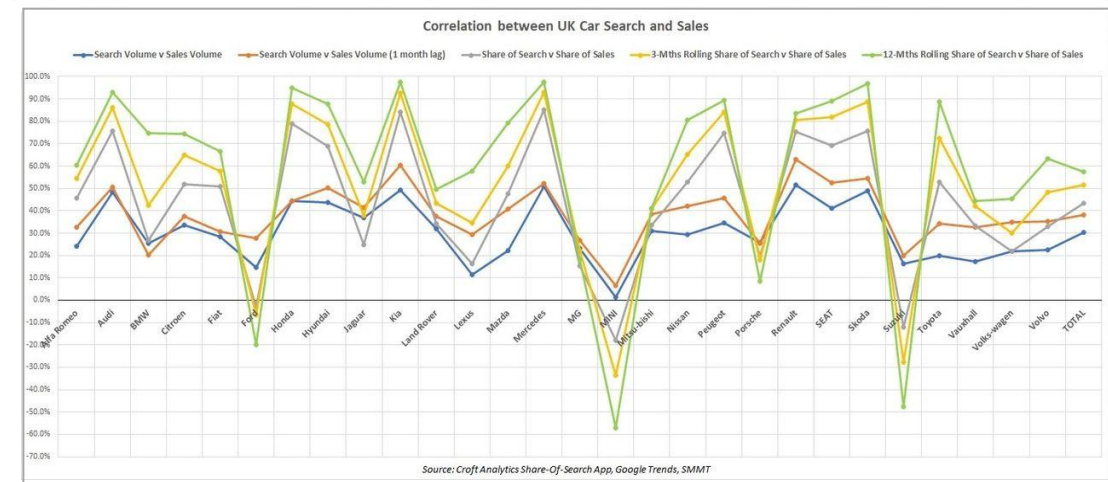
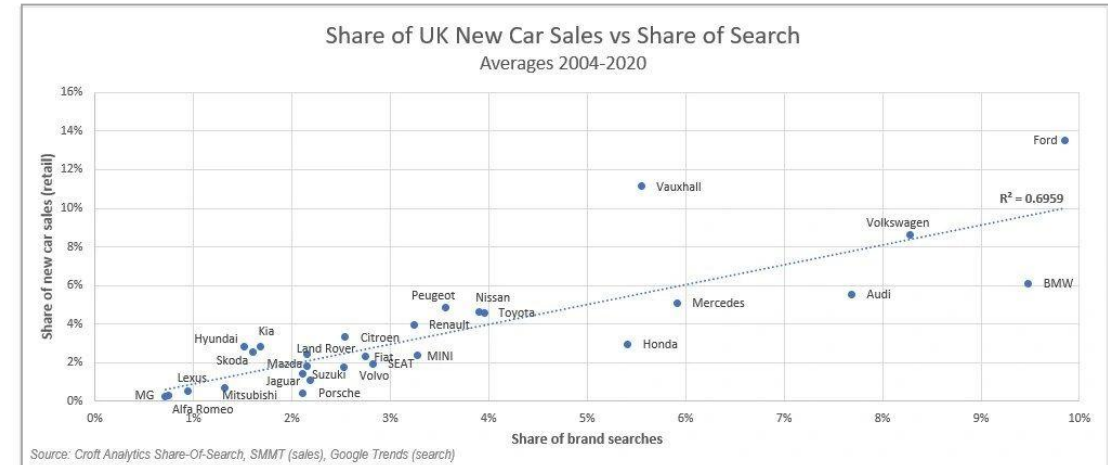


CARS – THE LINK BETWEEN SEARCH AND SALES

Analysis of UK car search data and new car registrations for 28 brands from 2004-2020 shows a variable relationship between share of search and share of sales. Data for some brands highlight a strong link between search volume and sales (eg. Mercedes, Audi, Kia, Skoda), while the relationship for other car brands appears to be low (eg. Ford, MG, MINI, Porsche, Suzuki).

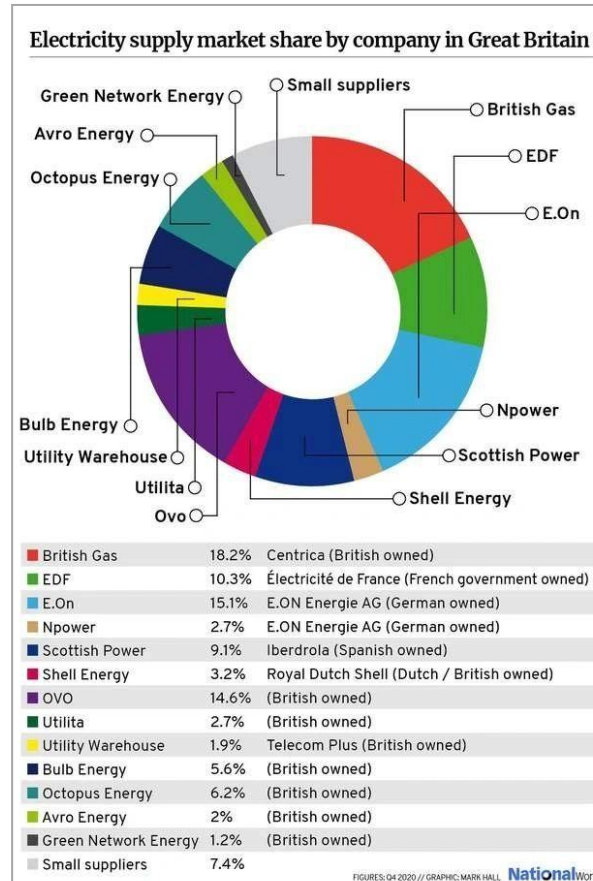
- The correlation between monthly volume of new car registrations and search volumes varies by brand: lowest correlation for MINI at 1%, highest for Renault at 52%. Lagging search to sales by one month increases correlations for 26 of the 28 brands: lowest for Suzuki at 20%, highest for Renault at 63%.
- The correlation between monthly % share of sales and % share of search is variable: lowest for Ford at -3% (suggests that a lot of Ford searching is unrelated to purchase), highest for Mercedes at 85%. Seven brands had higher 1-month lagged correlations. Lagging the correlation beyond one month results in lower average correlations.
- The correlation between 3-month rolling share of market and share of search is variable: lowest for Ford at -7%, highest for Mercedes at 93%.
- The correlation between 12-month rolling share of market and share shows high brand variation: lowest for Porsche at -6%, highest for Kia at 98%.

This analysis shows that, for some brands, share of searching can be helpful in predicting new car sales. It shows there was a **.70 r-squared** coefficient of determination between share of search and market share for car brands.

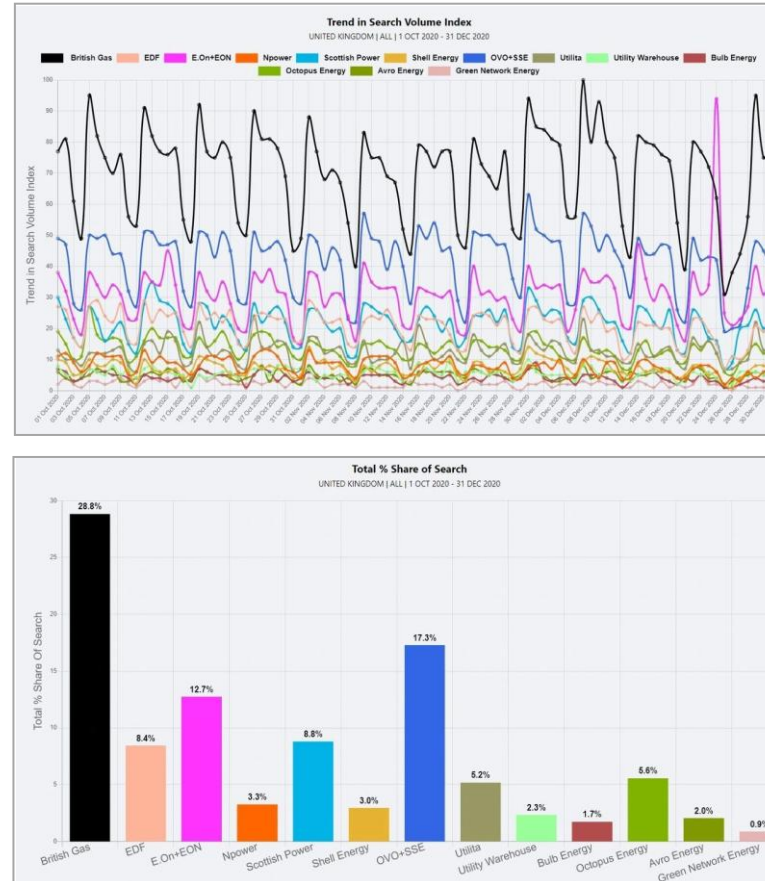


ELECTRICITY – THE LINK BETWEEN SEARCH AND SALES

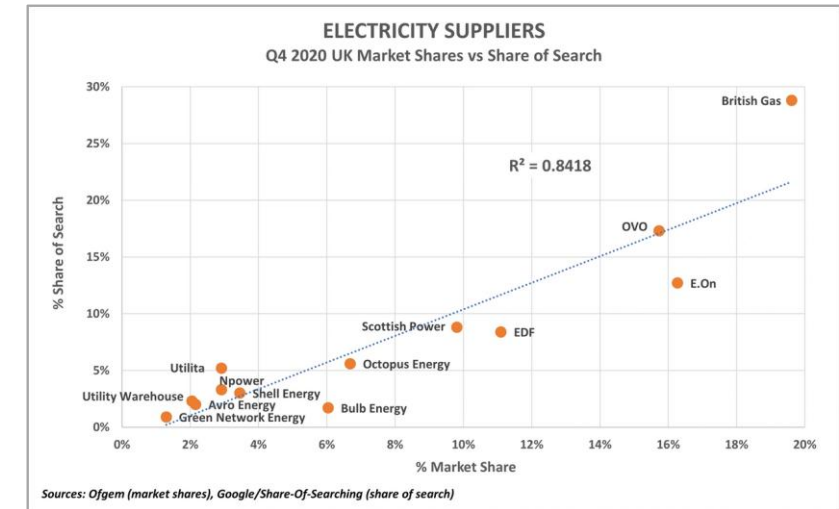
This chart shows data from Ofgem on electricity supplier market shares in the UK in Q4 2020.



These charts from Share of Searching show relative search volumes and % share of search for the same electricity suppliers in the UK in Q4 2020.

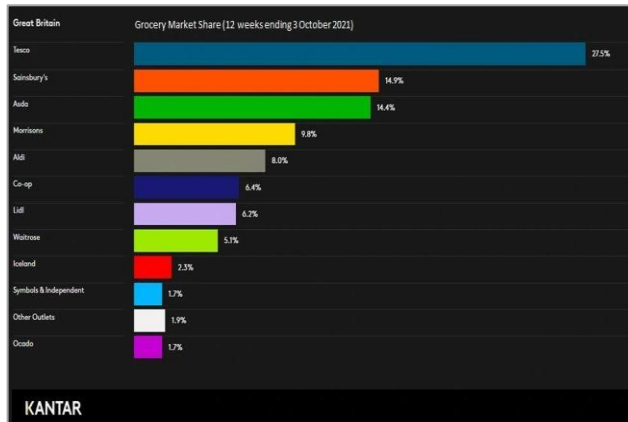


This chart compares UK share of search and market share for electricity suppliers in Q4 2020. It shows there was a **.84 r-squared** coefficient of determination between share of search and market share for these suppliers.

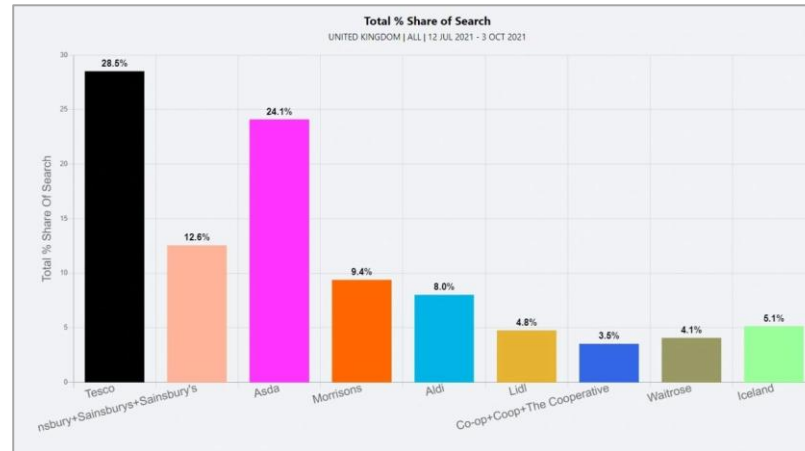


GROCERY RETAILERS – THE LINK BETWEEN SEARCH AND SALES

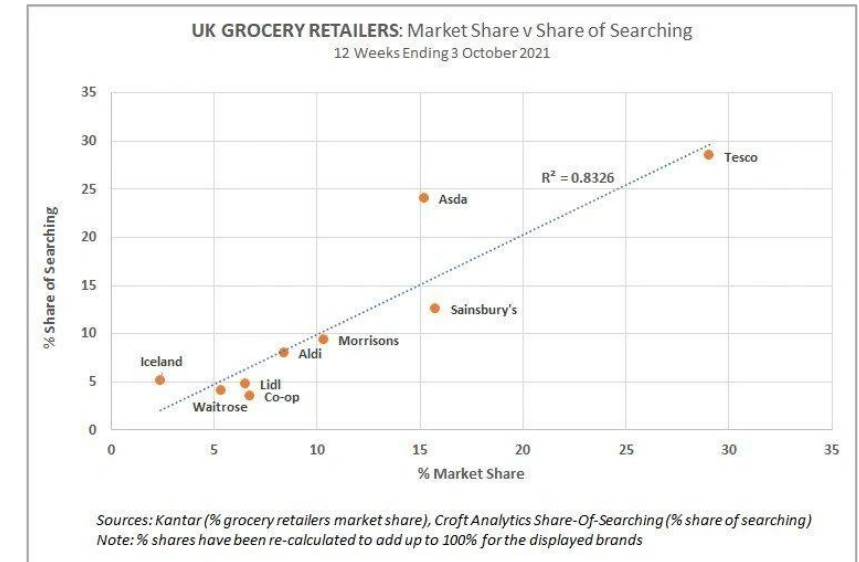
This chart, from Kantar, shows the market shares of grocery retailers in the UK in the 12 weeks to 3 October 2021.



This chart from Share of Searching shows % share of search data for the same UK grocery retailer brands over the 12 weeks to 3 October 2021.



In the 12 weeks to 3 October 2021 there was **.83 r-squared** coefficient of determination between % share of search and % market share for UK grocery retailers - see the chart below.

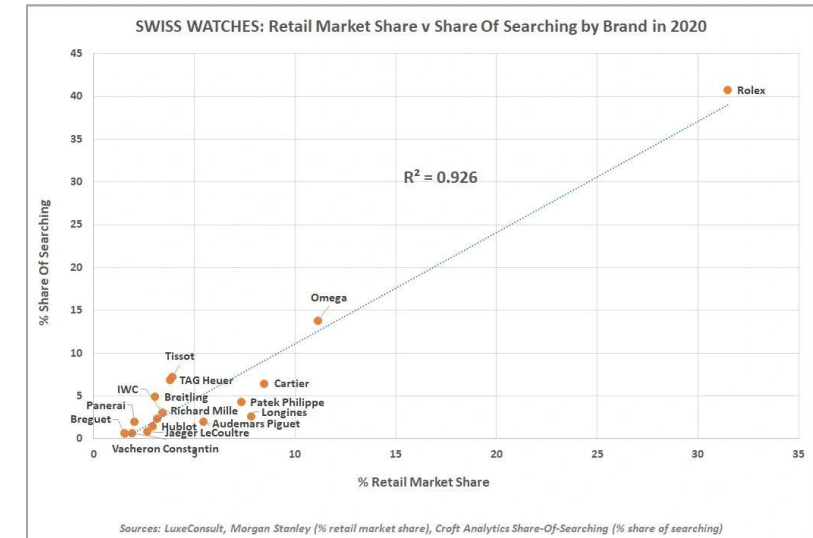
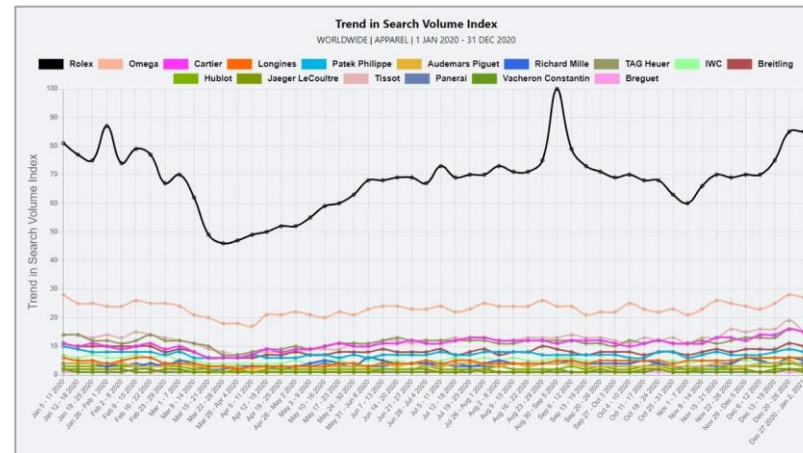
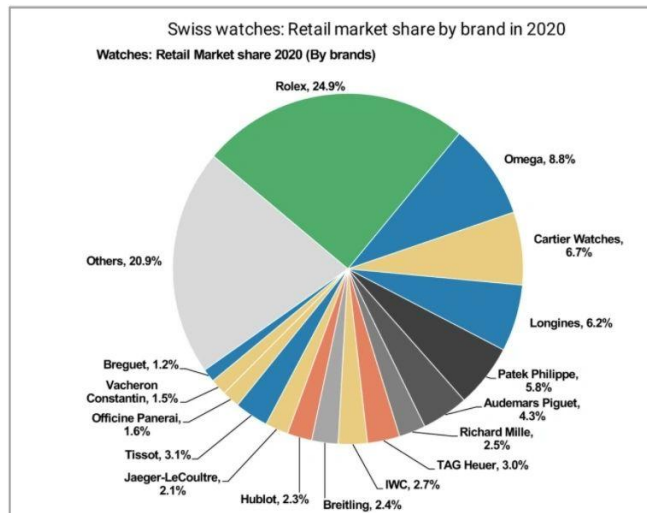


LUXURY WATCHES – THE LINK BETWEEN SEARCH AND SALES

The chart below shows retail market shares for Swiss watches in 2020. The data comes from Morgan Stanley Research and LuxeConsult's annual report on the luxury watch market, titled "King Rolex".

The chart below (from Share of Searching) shows the weekly trend in relative levels of searching for the same Swiss watches in 2020. Rolex had clear dominance of searching in the luxury Swiss watches category throughout the year.

In 2020 there was **.93 r-squared** coefficient of determination between worldwide share of searching and market share for luxury Swiss watches - see the chart below.



MOBILE PHONES – THE LINK BETWEEN SEARCH AND SALES

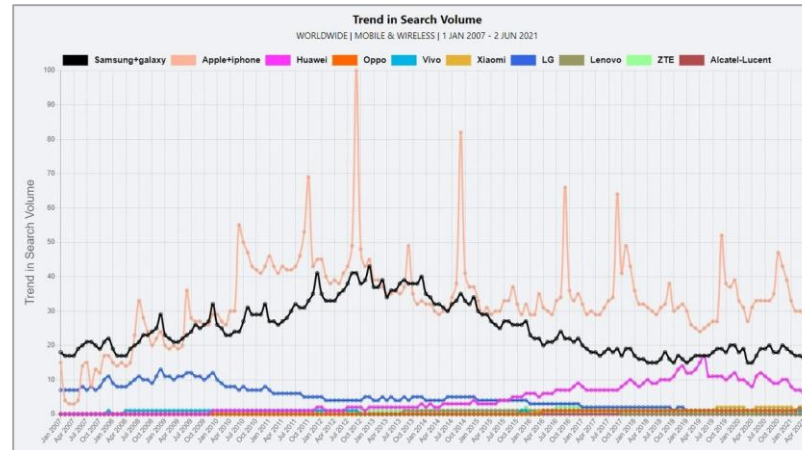
This table from Statista shows the 2019 global sales for each of the leading mobile phone brands.

Ranking of leading mobile phone brands worldwide in 2019, by shipments, sales, profit

Characteristic	Units Shipped (in millions)	Profit (in million U.S. dollars)	Sales (in million U.S. dollars)
Samsung	315	18,947	170,625
Apple	215	48,351	229,234
Huawei	152	6,890	87,646
Oppo	111	1,400	60,000
Vivo	95	1,125	46,484
Xiaomi	95	1,000	17,000
LG	55	110	46,800
Lenovo	50	535	43,035
ZTE	45	719	17,123
Alcatel-Lucent	20	218	15,149

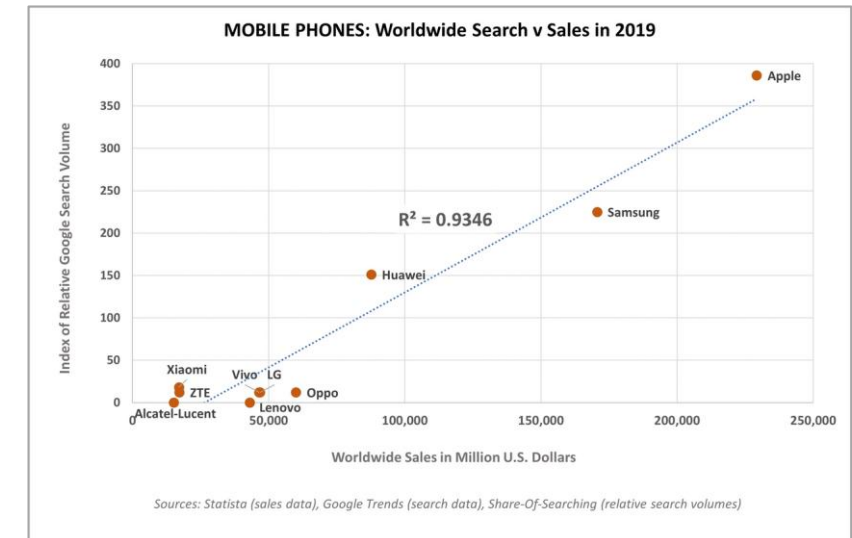
Source: Statista

This chart from Share of Searching shows the relative search volumes for the same mobile phone brands from 2007 to 2021. Exporting these data to Excel and totalling volumes for each brand in 2019 provides comparable data to the 2019 sales data.



This chart compares search volumes to sales for mobile phone brands in 2019.

The chart shows **.93 r-squared** coefficient of determination between search and sales for mobile phones.



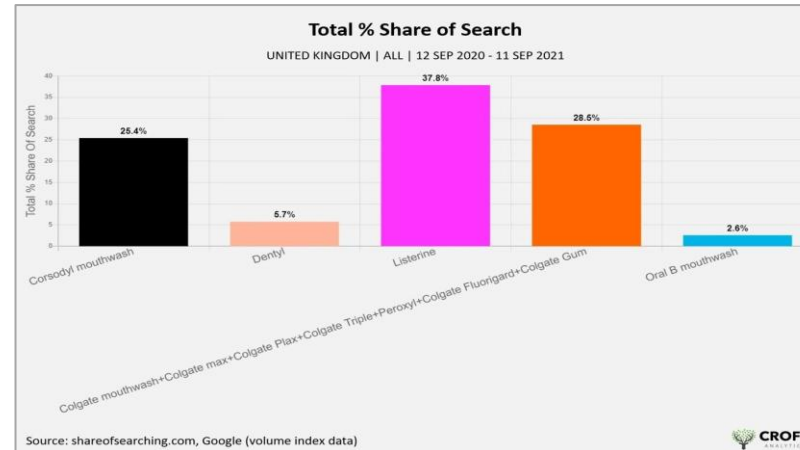
MOUTHWASH – THE LINK BETWEEN SEARCH AND SALES

This table from NielsenIQ shows value sales for the top five mouthwash brands in the UK in the 52 weeks to 11 September 2021.

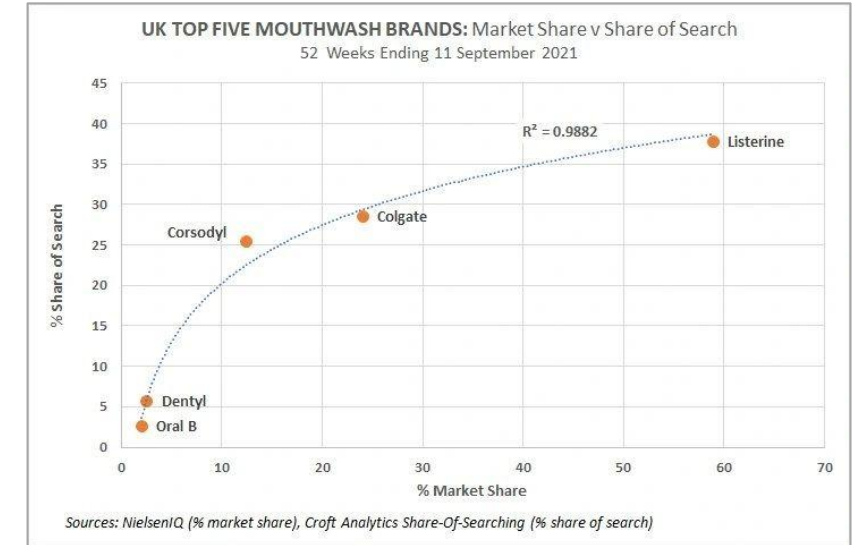
Top 5 Mouthwash				Total volume change	4.7%	
				£m	change (£m)	change (%)
		Total Category		140.6	7.0	5.3
		Total Own Label		7.6	0.9	1.2
2021	2020					
1	1	Listerine	Johnson & Johnson	72.9	4.7	6.9
2	2	Colgate	Colgate-Palmolive	29.8	1.5	5.5
3	3	Corsodyl	GSK	15.4	1.0	6.9
4	4	Dentyl	Dendron	3.1	0.4	15.4
5	6	Oral B	P&G	2.5	0.2	6.4

The Grocer's Top Products Survey 2021: Nielsen/IQ 52 w/e 11 September 2021
Source: Nielsen • Created with [Datawrapper](#)

This chart from Share of Searching shows % share of search data for the same UK mouthwash brands over 52 weeks to 11 September 2021.

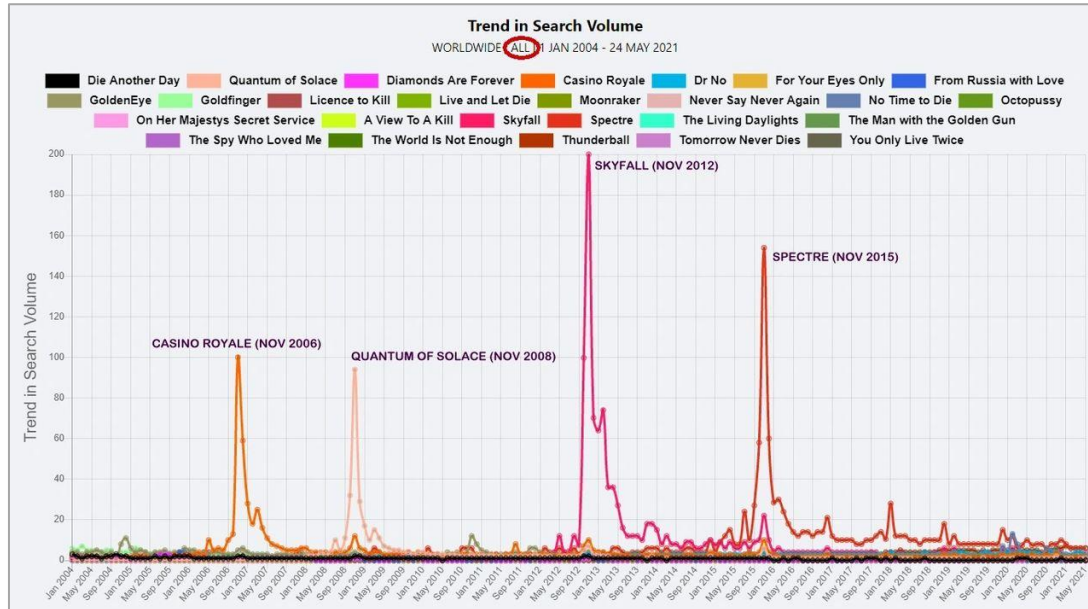


The following chart compares % market share and % share of search for the UK mouthwash brands in the 52 weeks to 11 September 2021. It shows there was **.99 r-squared** coefficient of determination between share of search and market share for the top brands during that period.

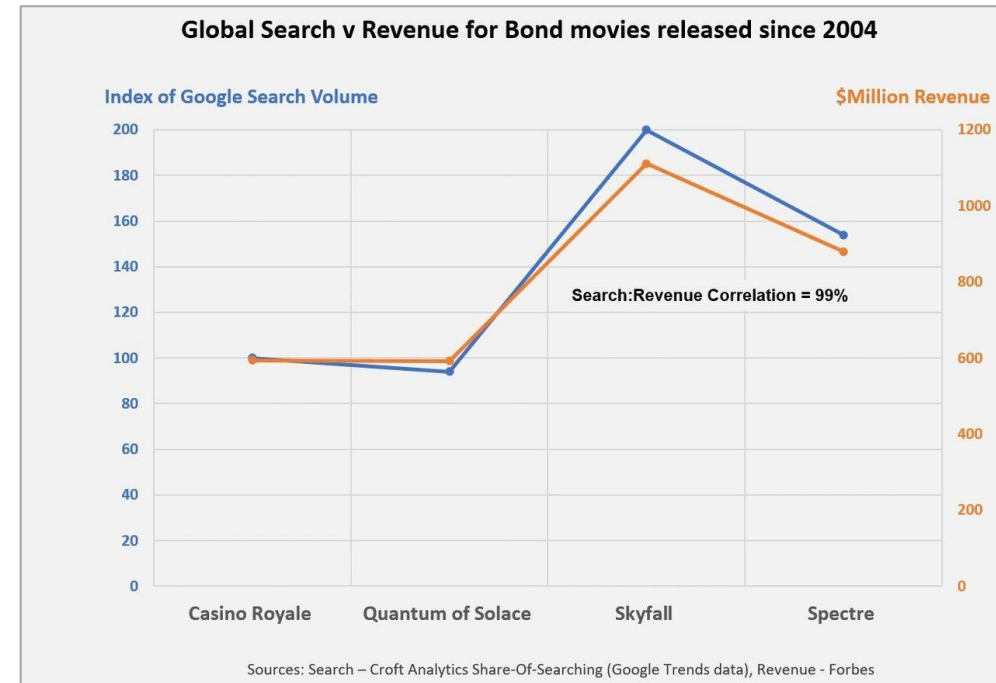


MOVIES – PREDICTING BOX OFFICE REVENUE FROM SEARCH

The chart below shows relative search volumes for all 26 movies in the Bond franchise from Jan 2004 to May 2021. These data show that the Bond franchise continues to grow. The data also show that whenever a Bond movie is released, in addition to the spike in searching for the new movie there is also a mini-spike in interest for other Bond movies, particularly the most recent prior releases.




This chart compares an index of search volume totals for the six months prior to the month of release for four Bond movie releases versus box office revenues for the same movies. The first of the four movies is indexed at 100. **The correlation between search volume prior to each movie and eventual box office revenue is 99%.** Using Casino Royale revenue as the base, it is possible to accurately predict, with above 90% accuracy, the revenue of the next three Bond movies using search volumes from the six months prior to the release of each movie.



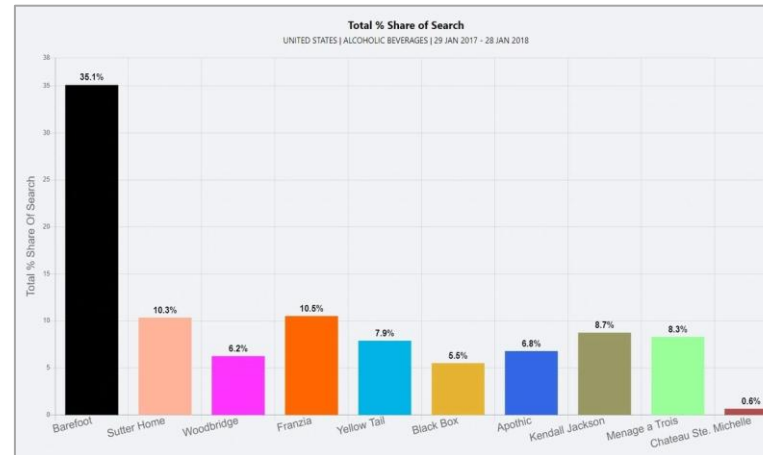
WINE – THE LINK BETWEEN SEARCH AND SALES

This chart from iRI shows sales revenue of off-premise table wine brands in the USA in the 52 weeks to 28 January 2018.

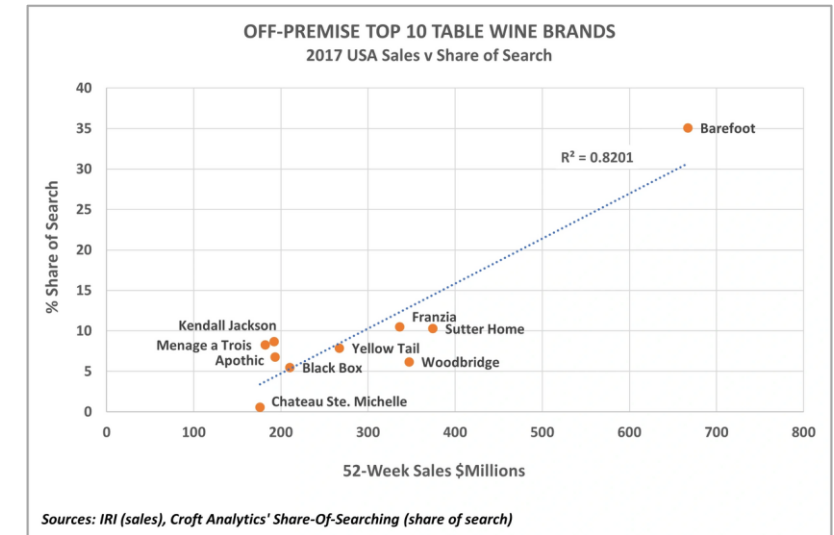
Rank	Brand	Parent/Importer	52-Week Sales (Millions)	Sales Change	Average Price (750ml)
1	Barefoot	E. & J. Gallo Winery	\$667	0%	\$5.52
2	Sutter Home	Trinchero Family Estates	\$374	2%	\$5.52
3	Woodbridge by Robert Mondavi	Constellation Brands	\$347	3%	\$5.45
4	Franzia (box)	The Wine Group	\$336	0%	\$2.29
5	Yellow Tail	Deutsch Family Wine & Spirits	\$267	-2%	\$5.52
6	Black Box Wines	Constellation Brands	\$210	28%	\$4.93
7	Apothic	E. & J. Gallo Winery	\$193	8%	\$9.57
8	Kendall Jackson Vintner's Reserve	Jackson Family Wines	\$192	-1%	\$12.07
9	Ménage à Trois	Trinchero Family Estates	\$182	2%	\$9.65
10	Chateau Ste. Michelle	Ste. Michelle Wine Estates	\$176	-1%	\$9.84
11	Cupcake Vineyards	The Wine Group	\$151	-2%	\$8.93
12	Bota (box)	Delicato Family Vineyards	\$146	25%	\$4.71
13	Beringer Main & Vine	Treasury Wine Estates	\$146	-8%	\$4.64
14	Josh Cellars	Deutsch Family Wine & Spirits	\$145	46%	\$12.55
15	Gallo Family Vineyards	E. & J. Gallo Winery	\$138	-4%	\$4.08
16	Bogle Vineyards	Bogle Vineyards	\$124	1%	\$9.43
17	Liberty Creek	E. & J. Gallo Winery	\$120	9%	\$3.51
18	Clos du Bois	Constellation Brands	\$119	-1%	\$9.12
19	Carlo Rossi	E. & J. Gallo Winery	\$115	-4%	\$2.56
20	Robert Mondavi Private Selection	Constellation Brands	\$114	15%	\$8.88

Source:  iRI all table wine in multiple outlet and convenience stores; 52 weeks ended Jan. 28, 2018.

This chart from Share of Searching shows the USA % share of search data for the same wine brands in the 52 weeks to 28 January 2018.



This chart compares USA share of search and sales for off-premise wine brands in the 52 weeks to 28 January 2018. It shows there was **.82 r-squared** coefficient of determination between share of search and sales revenue for these brands.



SHARE OF SEARCH – A METRIC FOR TRACKING AND PREDICTING BRAND PERFORMANCE

There is a large body of evidence showing that share of search is a valuable metric for marketers, not least because for many it can be used to predict market share. Some experts argue that share of search should replace share of voice as a metric for setting advertising budgets and predicting growth. This is not new: in the early 2000s I discovered that a brand's share of search in the automotive sector could be used to predict its market share accurately, in every country. Subsequently the predictive link to sales was proved in several other categories.

The use of share of search data to help predict market share is possible for brands in many categories, particularly where search is a big part of consumer purchase decisions.

A question is whether brand owners should target growth in share of search to grow share of market. The direction of causality needs to be established. Do brands with high market share simply have more buyers, and therefore more people searching for their brand, than smaller brands with fewer buyers? Causality could be one way: higher market share leads to higher share of search, not the other way round. This is likely to be true for some (lower interest, lower involvement) categories where search is not much used in the buying process. But in categories where searching is a key part of purchase decision making – automotive, finance, electronics, travel etc. – there is strong evidence that share of search can be used to predict share of market, with a variable lag between searching and buying. For these categories, increasing share of search is a sensible objective to help drive brand growth, as well as providing a daily metric for measuring marketing success.



Excess share of search (ESOS), where a brand's share of search is greater than its share of market, is being touted as a possible way to predict market share. The theory is that brands with relatively high ESOS will gain market share versus those with relatively low ESOS. In 1990, John Philip Jones, a professor at of Public Communications at Syracuse University in New York, introduced the concept of excess share of voice (ESOV) and The Jones Curve (or Advertising Intensiveness Curve) as ways of examining the relationship between ESOV and future market share. At the time this method was largely applied to packaged goods categories. An equivalent curve today, that shows the relationship between ESOS and market share, can be used to predict market shares in categories where search plays a vital role in the purchase process.



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