



Navigating the New Era: The Changing Search & Video Landscape

July 9, 2026

Agenda

01



Connected Ecosystem



Janine Cross

EVP, Activation



02



Embracing the
Future of Search



Amanda Feld

Agency Lead



Lawrence Donaldson

VP, Search



03



Building Demand
Across the Google
Ecosystem



Darren Pan

Video



Eve Vitale

VP, Programmatic



04



Measurement: The
Competitive Edge
Powering Your AI



Cameron Allison

AE & Measurement



Dan DeLozier

AVP, Digital Strategy



05



Summary /
Next Steps



Dan DeLozier

AVP, Digital Strategy





Connected Ecosystem

AI Has **Reset Consumer Expectations** and how they Search, Discover, and Decide



Keywords

Short, manual queries



Conversations

Natural questions and exploration

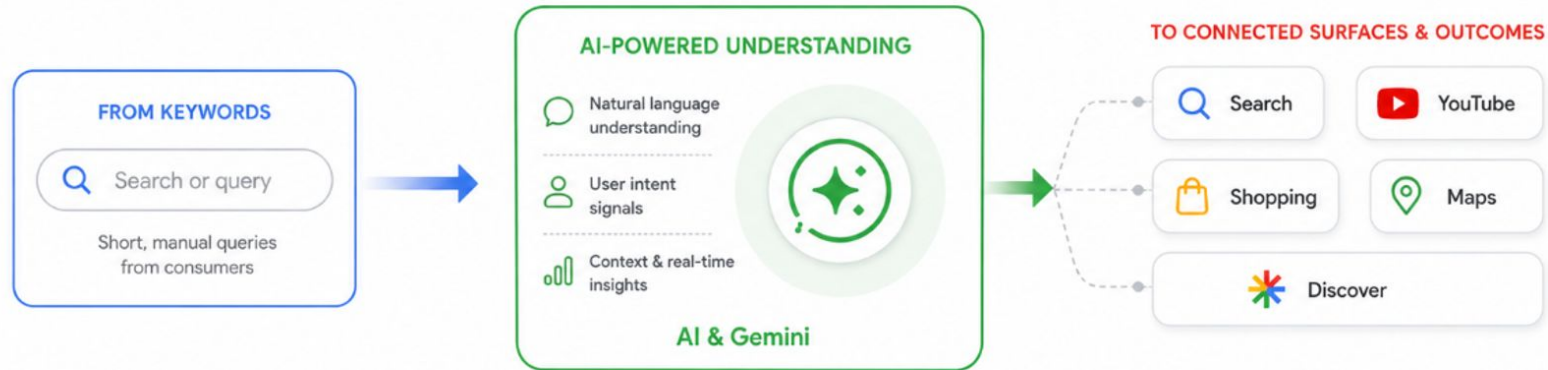


Decisions

Guided discovery and action

Consumers now expect **answers**, **assistance**, and **faster paths** to action.

The Biggest Change to Search in 25 Years

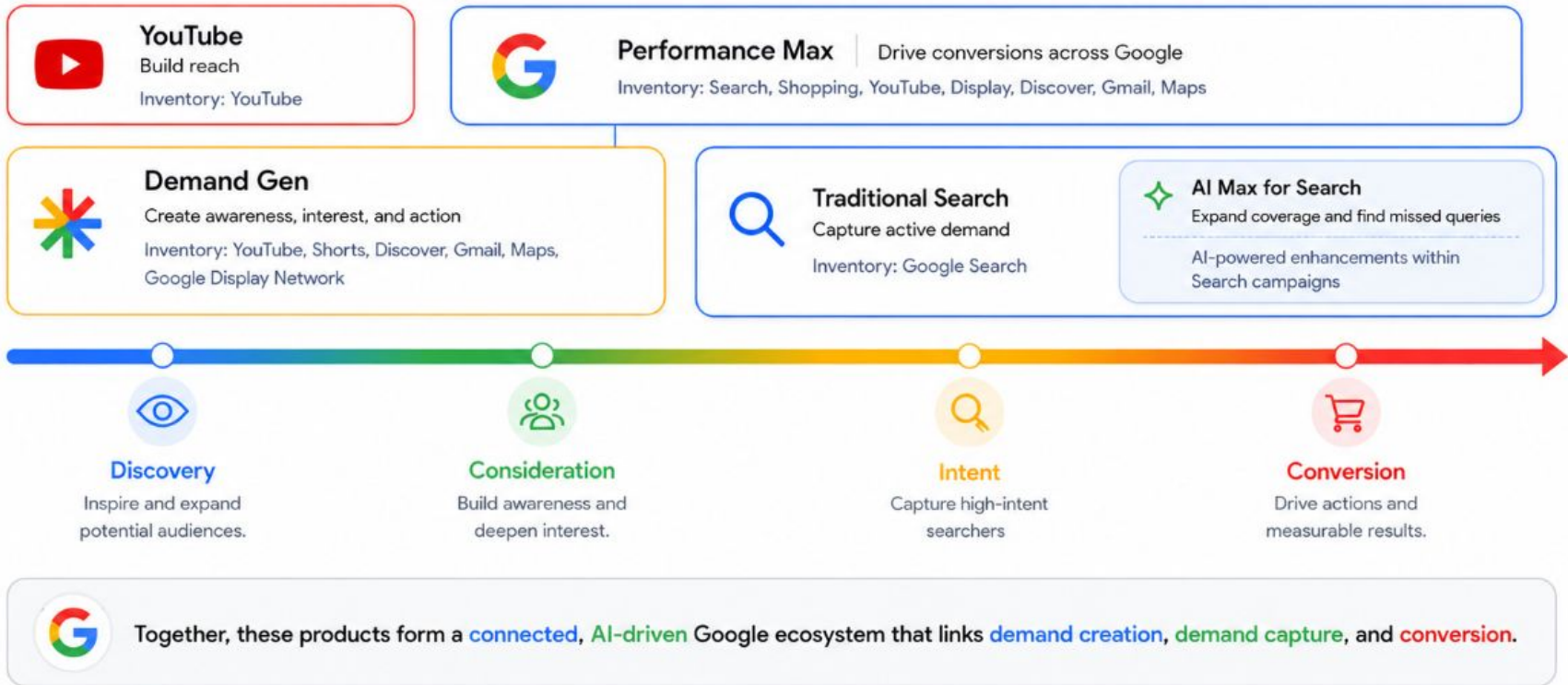


AI & Gemini are the backbone

Intent-based, not keyword-based

Every Google surface is affected

A Connected AI Ad Ecosystem



Test Everything.

Your path to winning in an AI-Driven ecosystem

Get costumers from
discovery to decision faster

Performance Max

All surfaces. One Campaign.

AI Max

Intent queries + AI-generated Creative

Drive Demand
with video

Demand Gen

Immersive creative across YouTube,
Gmail & Discover

YouTube

Video Views + Video Reach +
Connected TV

Build a modern
measurement framework

Marketing Modeling Mix (MMM)

Attribution Solutions

Incrementality Experiments

Use **connected data** to power
smarter measurement



Embracing the Future of Search

AI is driving an expansionary moment for Search

And people are using Google Search more than ever

We see over **5 trillion** searches on Google annually, with growth coming from

New ways to search - Google Lens is now at more than 25 billion queries a month

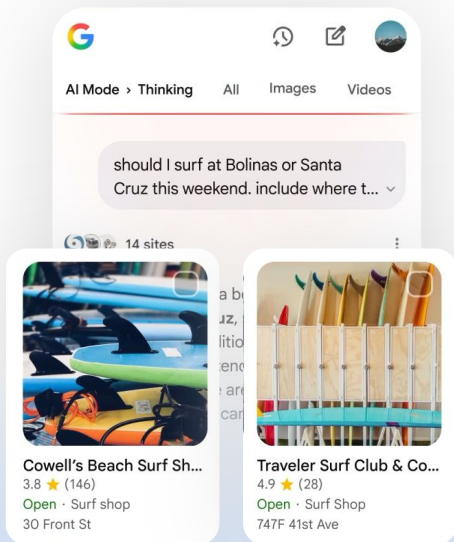
Searching more than before - AI Overviews, used by 2B users who are increasingly happier with their results, and searching more often

Asking complex questions - AI Mode, with 75M DAU ask much longer questions, 2-3 times the length of traditional searches

Search has evolved beyond information to **intelligence**

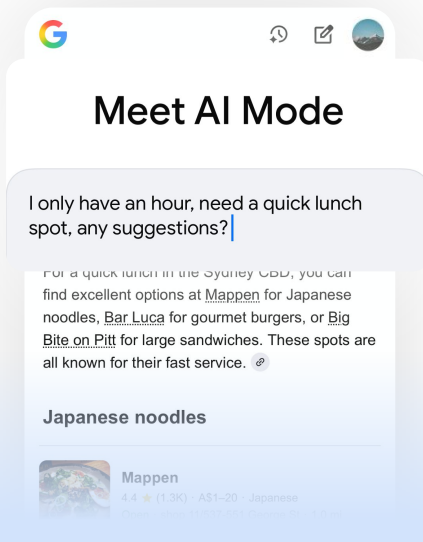
More intelligent

Deeply understanding intent



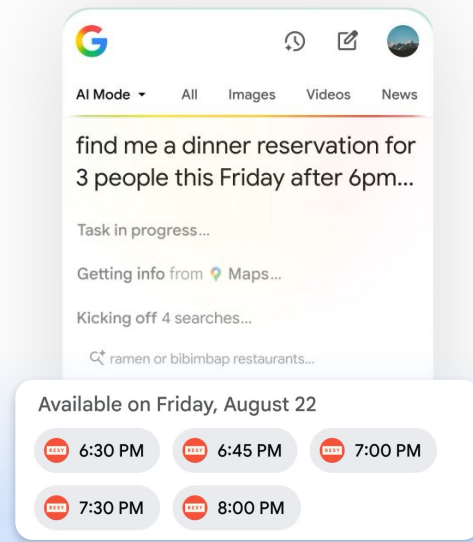
More personalized

Customized results when you opt in



More agentic

Helping with task completion



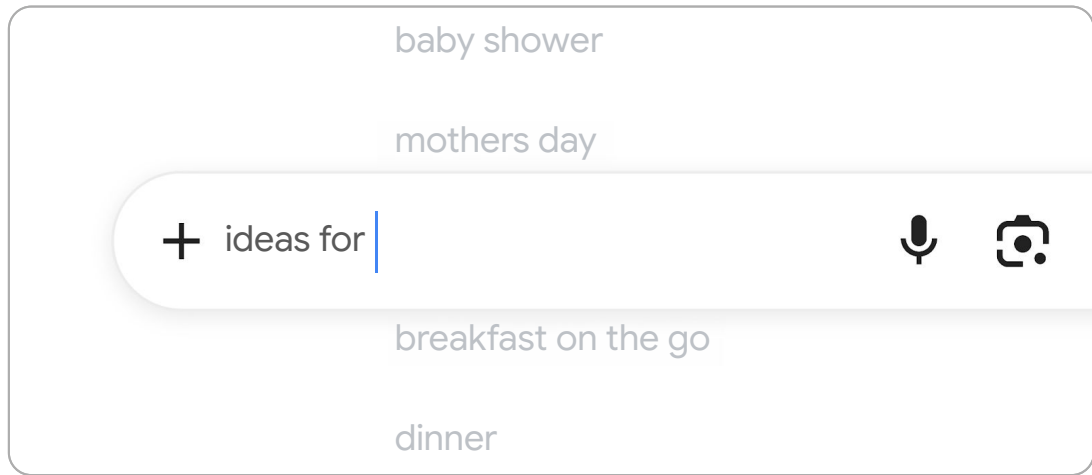
CREATE DEMAND

Google Search is where people figure out **what they want** – not just find what they're looking for

71% of shoppers coming to Google Search agree they are open to trying new brands or products

We're seeing growth in queries with terms like “**where should I**”, “**which**” and “**ideas for**”

And **brainstorming queries** in AI Mode in the US have **grown 30%** faster than AIM queries overall since launch



To be the best answer, you need to be **AI ready**

AI Max and Performance Max are **unlocking billions of net new queries** that these advertisers weren't reaching before

A graphic for AI-Max for Search Campaigns. It features a black rounded rectangle with a white border. Inside, the Google 'G' logo is at the top. Below it, the text 'AI-Max for Search Campaigns' is written in white and blue. The background has faint circular patterns.

**AI-Max for
Search Campaigns**

Now expanding to
Shopping & Travel Campaigns

NEW
GML

Advertisers who adopt **AI Max** or **Performance Max** campaigns see an average of **15% more conversions or conversion value** at a similar CPA/ROAS

A graphic for Performance Max (PMax). It features a black rounded rectangle with a white border. The text 'PMax' is in the center in white. Surrounding the text are several circular icons representing different Google services: YouTube, Google, Maps, Shopping, Gmail, and YouTube.

PMax

A graphic for AI Brief. It features a black rounded rectangle with a white border. The text 'AI Brief' is in the center in white. A small circular badge in the top right corner says 'NEW GML'.

AI Brief

Use your own words to **give Google AI insight into your brand guidelines, advertising objectives, and audience goals** so it can **steer your campaigns and drive better results**

AI Max for Search campaigns

brings the latest and best of Google AI to
boost performance

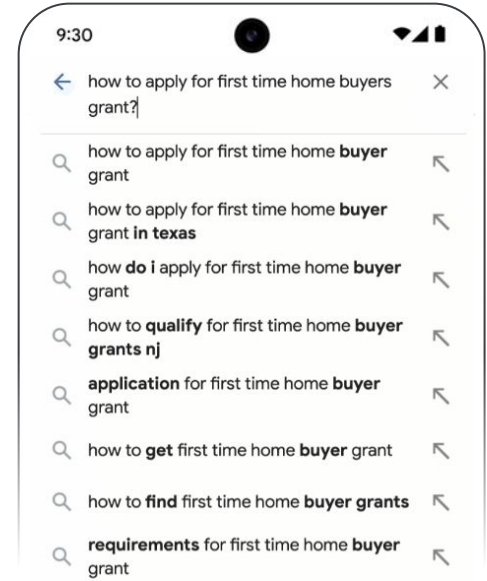


AI Max for Search campaigns is a single solution that prepares your campaigns for the **Future of Search Ads**, including **Ads in AI Overviews** and **AI Mode**.

Search Term Matching | Text Customization | Final URL Expansion

AI Overviews

is one of the most
successful launches in
Search in the past decade



AI Overviews reach more than **1.5B people globally** in more than **200 countries and territories**

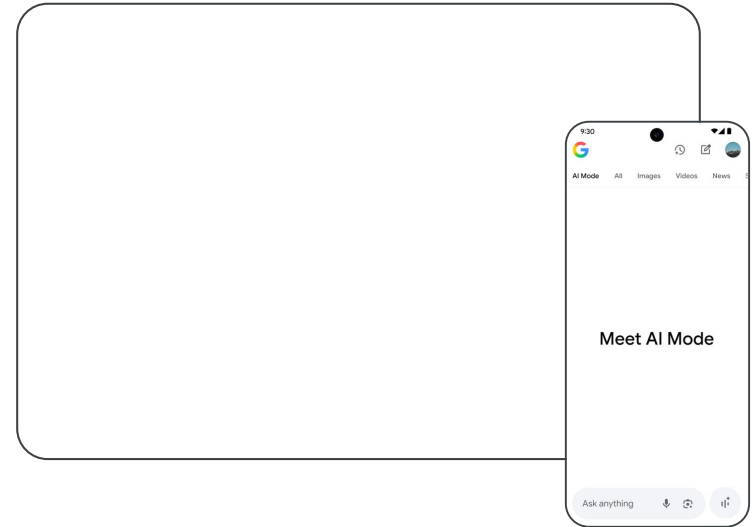
AI Overviews brings generative AI to **more people than any other product in the world**

With AI Overviews, people **search more** and they ask **new types of questions**

AI Mode is a total reimaginging of Search

People are using AI Mode to **learn, explore or dig deeper** by asking open-ended and follow-up questions

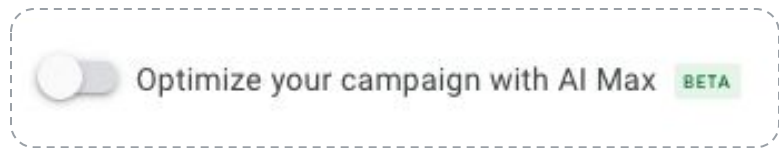
Early testers of AI Mode are asking much longer queries, **2-3 times** the length of traditional searches.



Experiences shown are currently available in the U.S.

SOURCES: Google I/O 2025

AI Max: Supercharge Performance With One Click



14% more conversions
at a similar CPA/ROAS when
advertisers activate AI Max in
Search campaigns



27% more conversions
at a similar CPA/ROAS for
campaigns using mostly exact
and phrase-match keywords

We are asking longer questions on Google Search

From

Q Best savings accounts



High-yield savings account for a \$10k emergency fund, no monthly fees, allows instant transfers?

AI Mode

- **Deeper context** in each query
- **Multiple constraints** in a single search
- **Conversational question** vs keywords

Tailor your ads to match customer intent

Expand your keyword reach with tailored ad copy to match user intent in real-time

skin care for dry sensitive skin



Moisturizer

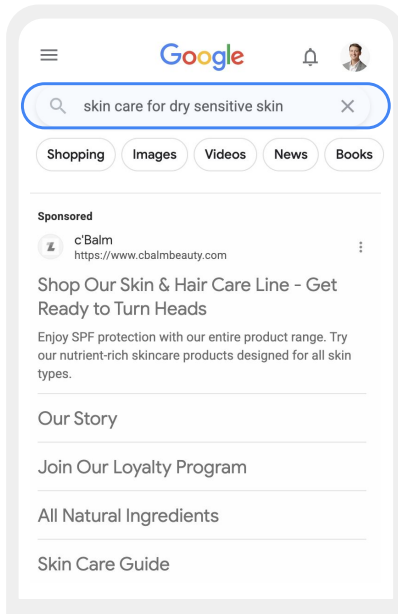
Broad match keywords that could be matched with the query 'skin care for dry sensitive skin'

AND / OR

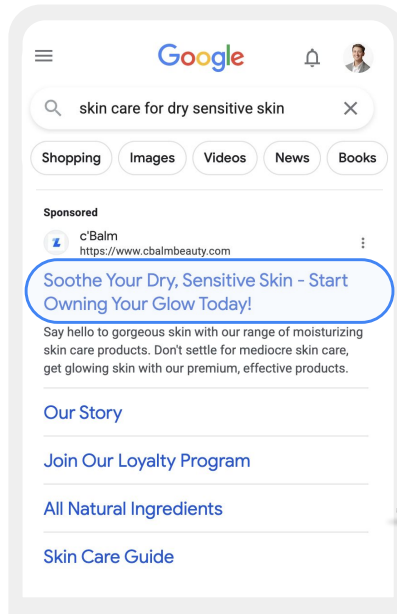
Keywordless targeting leverages a non-keyword asset that best matches the query to your potential ad.

Search Term Matching

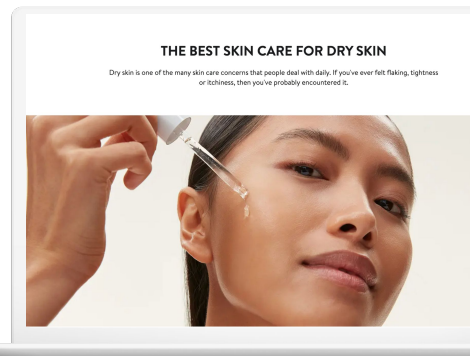
Not customized



Customized



Text Customization



Final URL Expansion

At the heart of AI Powered Performance is your Control & Safeguards

> Targeting Controls

Negative keywords lists to curb targeting queries deemed irrelevant

Location Targeting at ad group levels to inform the system of the context in which you want to target queries.

> Brand Controls

The system is **designed to fact-check** generated content against landing page content.

Leverage **Brand inclusion and exclusion** settings to gain control over branded term presence in search results.

> Creative Controls

Advertisers can use **URL exclusions & inclusions** to control which URLs to leverage..

Text guidelines: specify terms, phrases, concepts, or brand tone to exclude from automatically generated headlines & descriptions.

The Search Ecosystem Is Moving at the Speed of AI

Adapt Faster Than the Market

Search is evolving from:

- Keywords → Conversations
- Links → Answers
- Queries → Exploration
- Searchers → AI-assisted decision makers

Brands that experiment will gain the advantage:

- Consumer behavior is changing faster than marketing playbooks. Waiting for "best practices" means arriving after competitors.
- A **test-and-learn mindset** creates both short-term performance learnings and long-term competitive advantage

Long-Term: Build an Adaptive Marketing Approach

Operate for the Future of Search

Designed ads
for **AI-driven
discovery &
demand**

1

Build **first-party data** advantages

2

Shift from campaign optimization to **business optimization**

3

Establish **continuous experimentation** as a core marketing capability

4

Paradigm Shift: Think about **the Search ecosystem cross distribution** (Paid, Organic and AI)

Harmelin Action Plan for Today's Search Environment

Immediate Actions to Build Brand Readiness

Future-Proof Search Campaigns

Opportunities

- Assess maturity & identify barriers
- Leverage available paid & organic signals

Experimentation

- Conversation language
- Prescribe AI products tests (AI Max, PMax)
- Scale successes and iterate on learnings

Measurement

- Reevaluate KPIs & metric goals
- Activate 1P data signals (CRM/Call Center)
- Audit tracking and attribution

Sensitive Categories: Healthcare & Banking

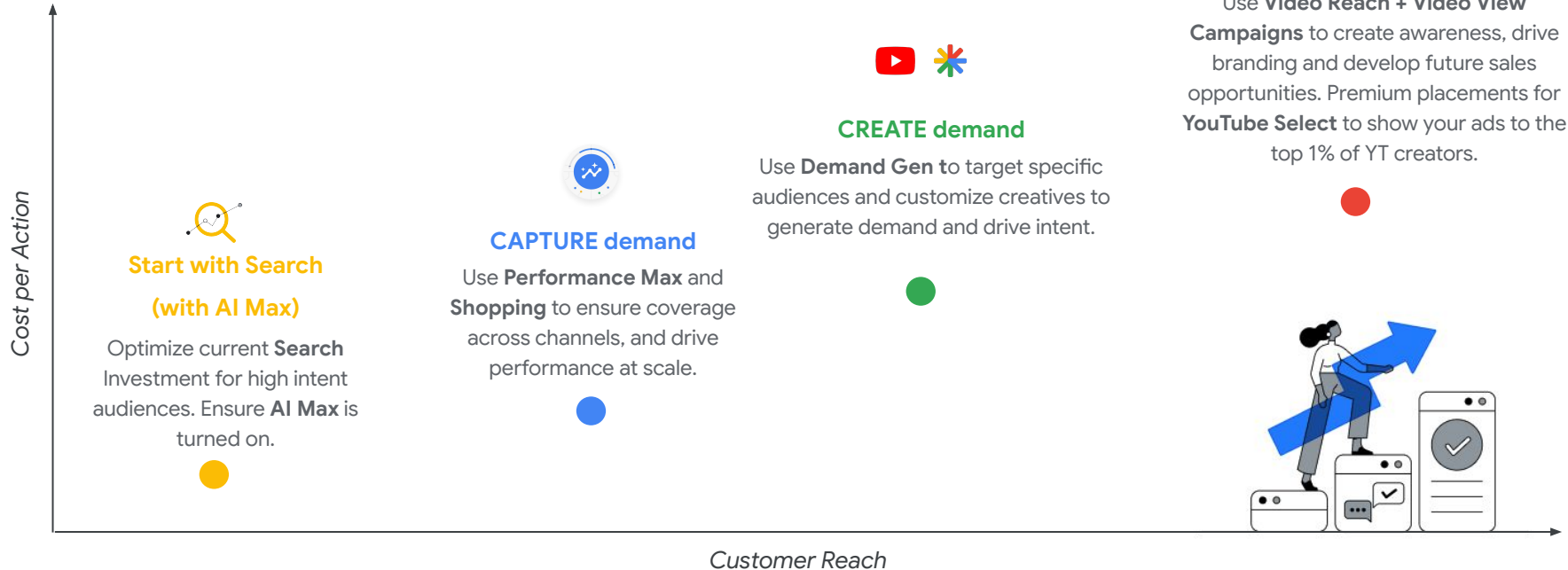
- **Adopt AI solutions with compliance in mind**
- **Leverage brand safety and targeting controls**
- **Build trusted, authoritative content**
- **Expand beyond demand capture to Discovery**



Building Demand Across The Google Ecosystem

Setting the Stage

How Google campaign types fit together



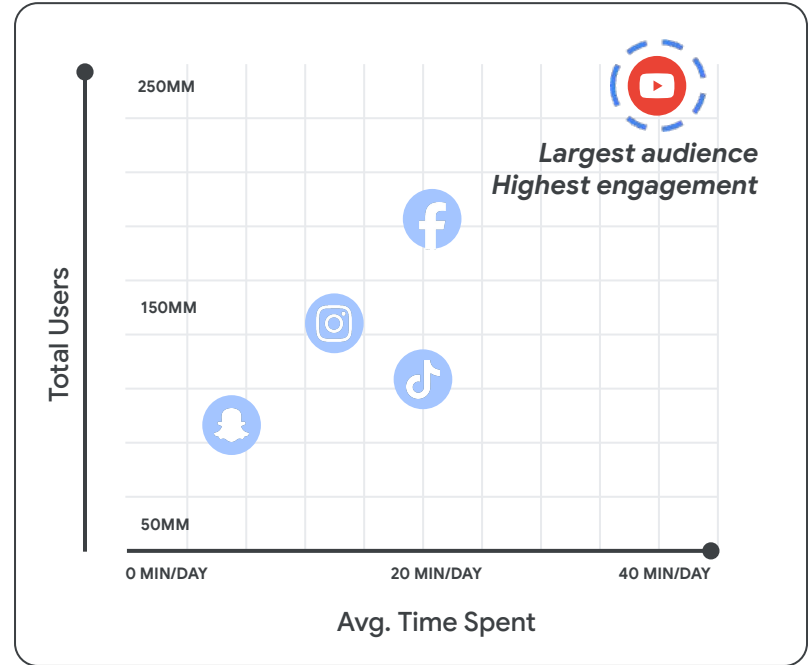


Demand Gen creates demand before consumers search



Today's discovery is tomorrow's search.

Why YouTube Wins Discovery




Source: Insider Intelligence, eMarketer 2023; Ages 18+; includes all time spent via any device. Figures are rounded to the nearest minute. Estimates of average time spent with media are based on the total US adult population according to the US Census Bureau 2010 release, not the number of users of each medium



Creating demand improves **long-term business growth**

Investing earlier in the consumer
journey builds familiarity &
consideration - delivering stronger
results over time

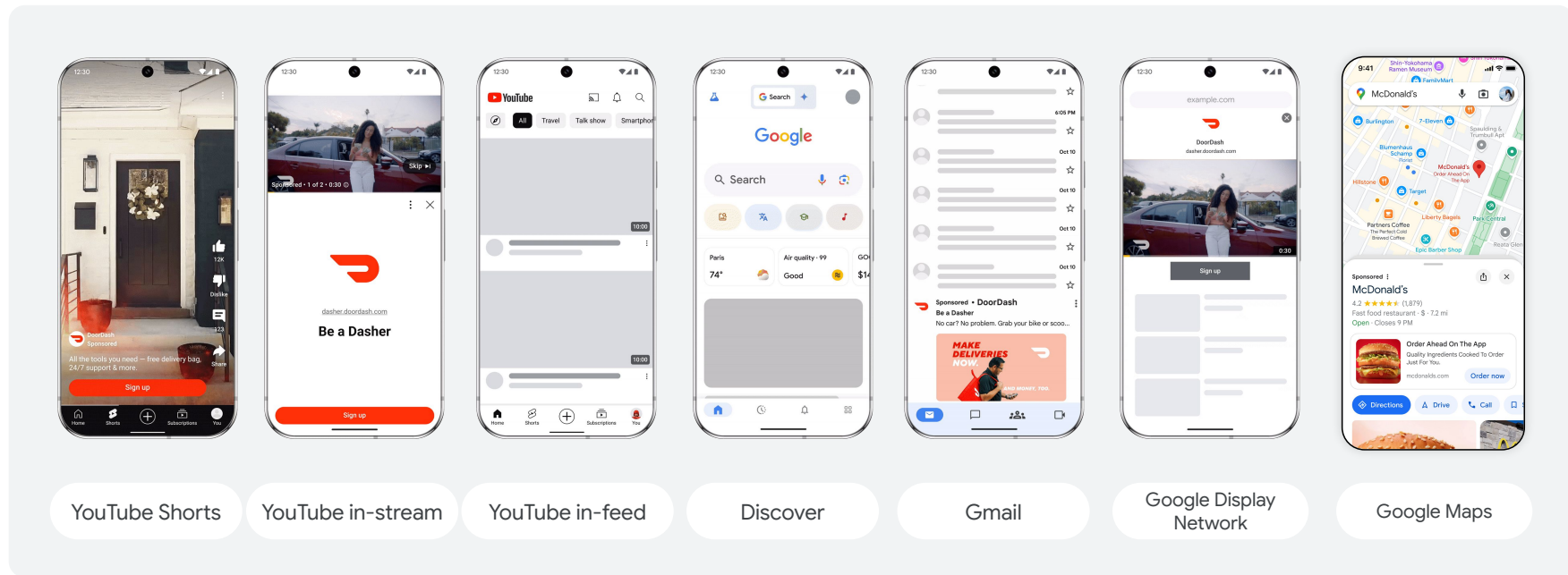
1. Circana, LLC MMM Databases, US meta-analysis based on 20 brand-level observations, derived from 40 MMM models run for 10 brands across 5 categories between 2022-2024. 2. Circana, LLC, MMM meta analyses commissioned by Google in 2025 that measured the long-term impact of media via Brand Equity pathways; Research included 20 brand-level observations derived from 40 MMM models spanning 104 weeks across 10 US CPG brands in the Home Care, Personal Care, Beauty, Food, and Beverage verticals (2023-2024); ROAS defined as incremental sales per \$ spent for total Google media.

86% 
higher

incremental
long-term ROAS
than paid social

Use Demand Gen to create and capture demand when consumers aren't searching for you

On average, **68% of Demand Gen conversions** came from users who did not see the brand's ads on Google Search in the 30 days prior to converting.



Harmelin's Framework for a Connected Google Ecosystem

Three planning principles we use to help clients adapt to Google's increasingly connected ecosystem.

1 Think Beyond Channel Silos

Consumers don't experience Search, YouTube and creators separately. **Your strategy shouldn't either.**

2 Integrate Brand & Performance

Growth comes from **connecting demand creation with demand capture** - not overinvesting in either one.

3 Match Creative to the Objective

Different objectives require different creative. **The right mix helps Google's AI perform better.**



Planning, investment and creative work together so every Google product has a clear role in driving growth.

YouTube Is No Longer Just a Video Channel. It's the **Connector**.



OUR PERSPECTIVE



Start with the business problem.

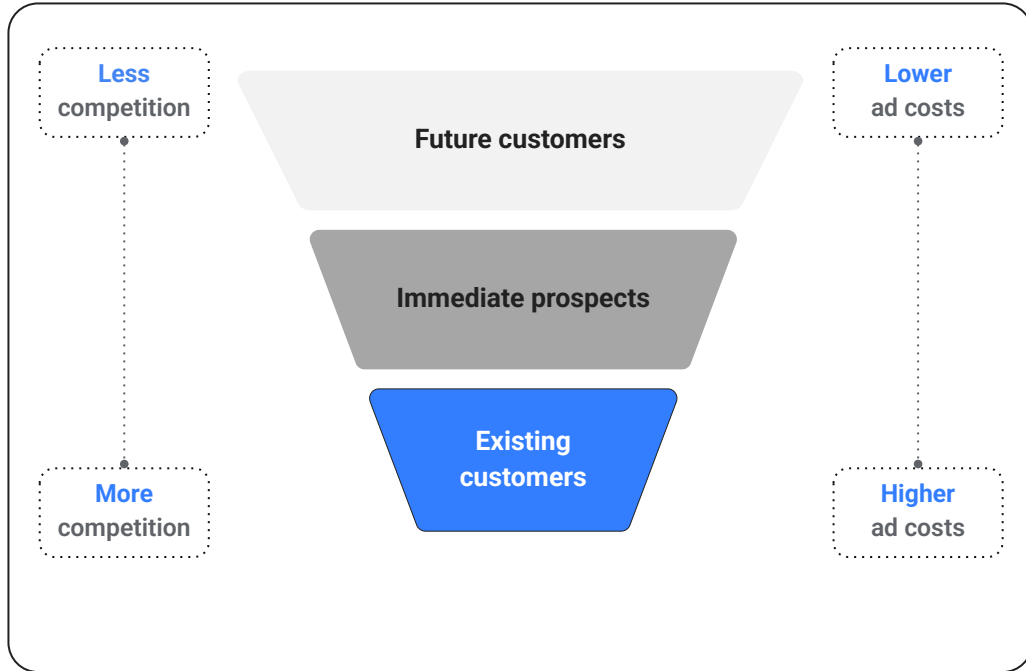
Define the role of each Google product based on the objective—not the budget.



Build One Connected Growth Strategy

Search, YouTube, Performance Max and Demand Gen should work together—not independently.

Growth Requires Brand + Performance Working Together



HARMELIN'S APPROACH

We build **ONE** integrated Google strategy.

- Shared Planning
- Coordinated Creative Strategy
- Integrated Optimization & Measurement

THE BUSINESS IMPACT

+67

%

Higher ROI

when Brand & Performance
are planned together



The goal isn't better YouTube or Search campaigns. It's better business growth across Google's ecosystem.

Creative Strategy Powers Performance



Build Awareness

Reach new audiences



Earn Consideration

Build trust & interest



Drive Action

Convert intent

The right creative gives Google's AI better inputs.

Build Awareness

Brand Assets



▶ 0:15



Build Recognition

Introduce your brand and establish awareness.



Earn Consideration

Creator Content



▶ 0:20



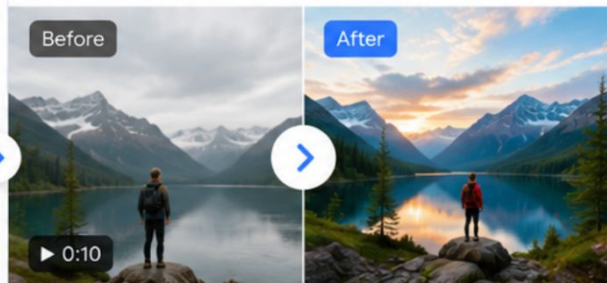
Build Trust

Authentic voices that build trust and credibility.



Drive Action

AI-Assisted Creative



▶ 0:10









Improve Efficiency

Google AI adapts and scales creative for better performance.

Connected Planning in Practice

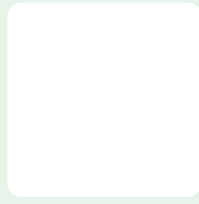
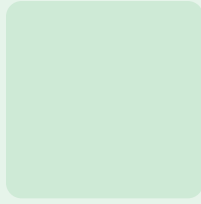
We don't build channel plans.

We build one Google growth plan.

| What Harmelin Connects | | What Clients Gain | |
|--|---|--|--|
|  Planning | → |  One integrated recommendation | |
|  Budgets | → |  Investment aligned to business goals | |
|  Creative | → |  Assets matched to each stage of the journey | |
|  Optimization | → |  Channels working together —not competing | |
|  Measurement | → |  Business outcomes instead of channel KPIs | |



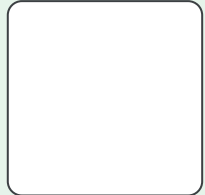
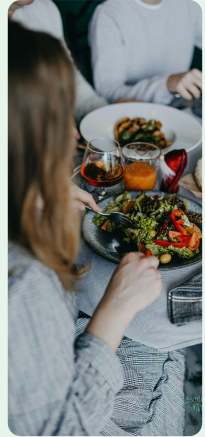
Measurement: The Competitive Edge Powering Your AI



DRIVE PERFORMANCE

Strengthen Your Data Signals

To future-proof your business and drive better results



The stronger the data you input, **the higher ROI** you will get out of Google's AI capabilities



**Data
Strength**



**Google AI
capabilities**



**Best Return on
investment**

1 Connect your data sources

You can now connect, manage and optimize all your data sources (website, app, Google Analytics, CRM, etc.) in one place.

2 Maximize your signals

Utilize a diverse set of signals to optimize the accuracy and completeness of your data set.

3 Activate your data

Once you have built your Data Strength, activate it using attribution, audiences, campaigns & bidding.

4 Prove your ROI with modern measurement

Prove the ROI increase from building and activating data strength using our modern measurement solutions.

Data Strength and measurement are the **foundation for growth**

Your modern measurement playbook

Data Strength



GTG
Google Tag Gateway

Advertisers who build their data strength by **connecting offline and app data** using Data Manager see a **26% average increase in incremental ROAS**

Causality



ABS
Attributed Branded Searches



QFC
Qualified Future Conversions

Unified View



Meridian



Google Analytics

Definition Refresh



Enhanced Conversions for Web

Conversion tracking feature which supplements your existing website conversion tags. When cookies aren't available, it sends hashed first party conversion data from your website to Google in a privacy safe way



Google Tag Gateway

First-party infrastructure tool that acts as a bridge between your website and Google by enabling tagging scripts directly on your own servers



Enhanced Conversions for Leads

Upgraded version of Standard Offline Conversion Import that allows advertisers to connect their internal SoT to Google Ads to track offline sales data

What is PDM?

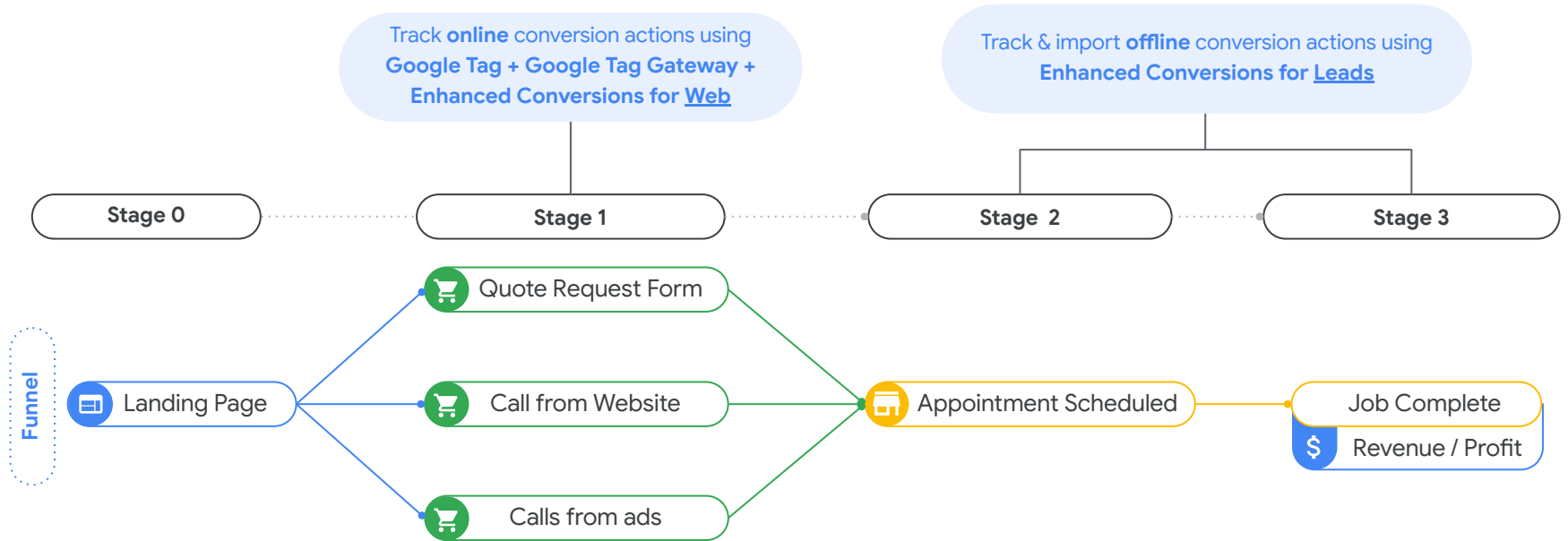
What is PDM?

Profit-driven marketing is about shifting marketing from a cost center to profit center. PDM shifts the emphasis from traditional metrics like clicks, impressions and leads, and instead **prioritizes the actual profit** generated for the business.

Why is it important?

It helps our customers **maximize profit** from their marketing investment using the best of Google Ads products.

Putting PDM To Use: HVAC Company



01

Understand business goals and map the L2S Journey

02

Set-up for success w/
Measurement Fundamentals
([Data Strength](#))

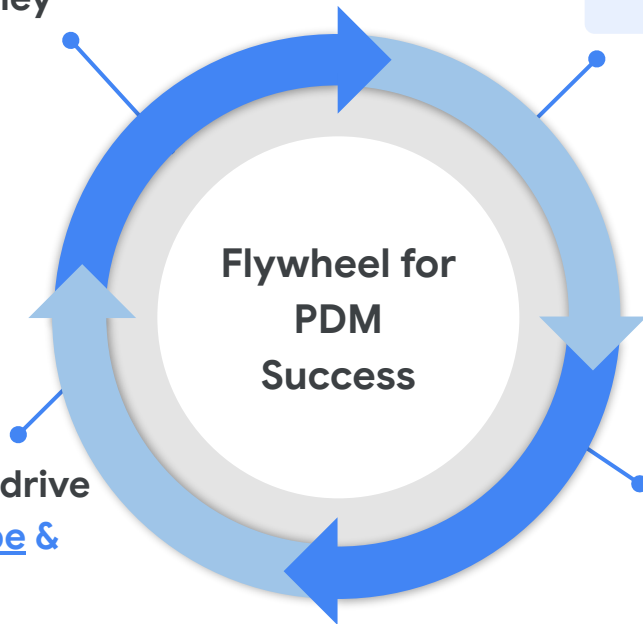
Flywheel for
PDM
Success

03

Maximize profitable
demand w/ Smart Bidding
& [AI Max](#)

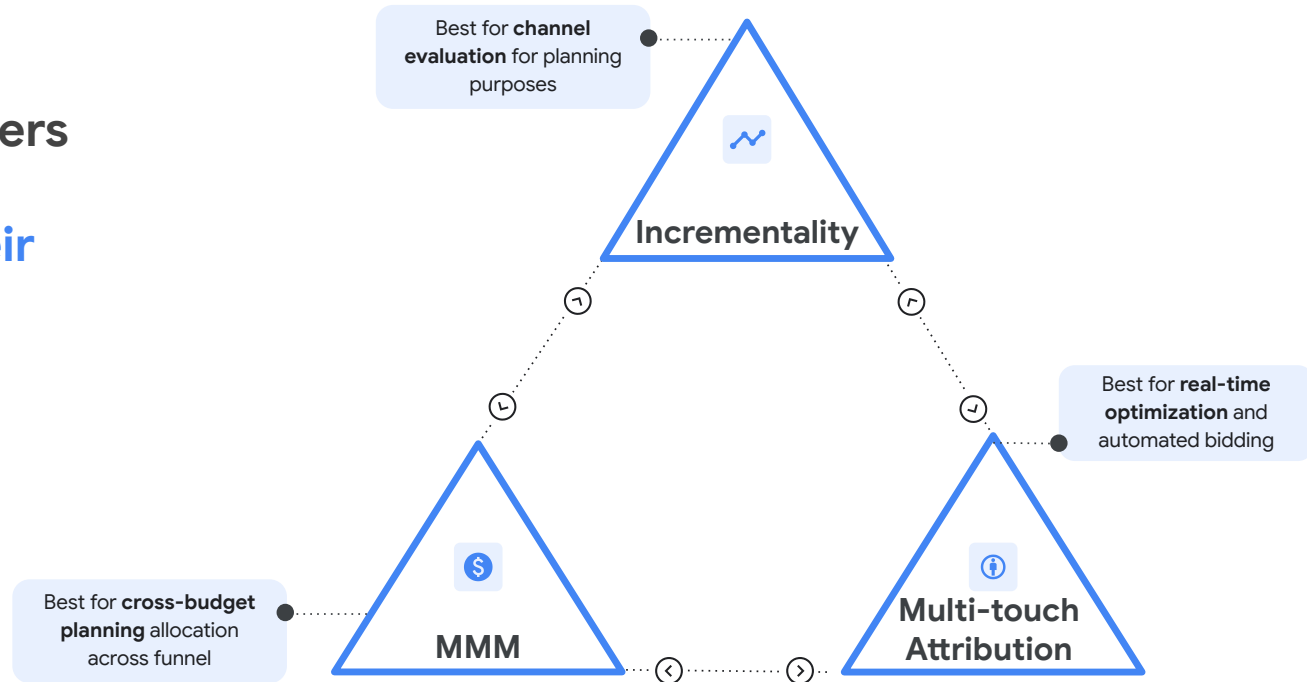
04

Generate demand and drive
awareness w/ [YouTube &
Demand Gen](#)



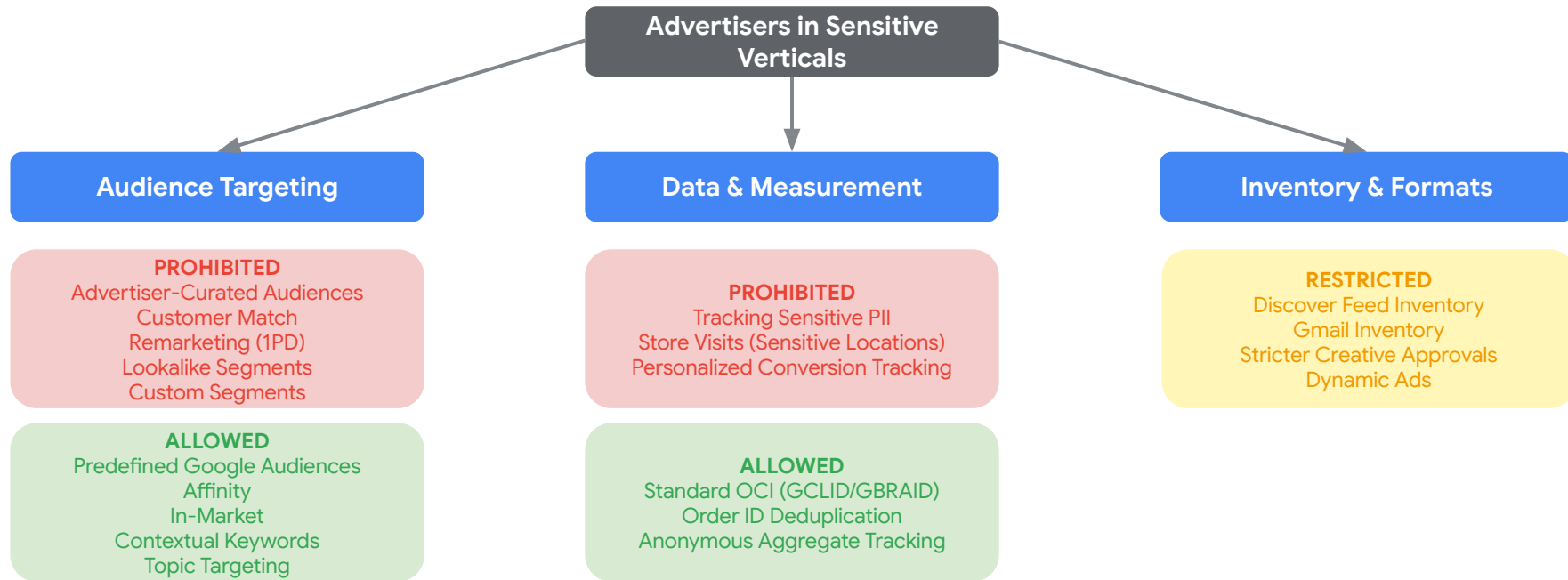
The Measurement Trifecta

How might advertisers measure the effectiveness of their media on their KPIs outside of Google?



Each tool plays a unique role.

Key Considerations for Advertisers in Sensitive Verticals



Drive significant growth by proving the true impact of media through Google's Media Effectiveness measurement tools



Media Effectiveness tools

Explore evaluating contribution and optimizing to greater contribution, which can be achieved through a combination of **attribution, incrementality, and MMM solutions.**



Prove the true value of media

Move beyond clicks and the “attribution mirage” to **incremental impact to sales and brand lift.**

Demonstrating true ROI deepens trust between the Agency, client, and Google.



Optimize spend and performance

Data-driven budget allocation drives efficiency. Advertisers running ~15 experiments (vs. none) in a given year saw **30% higher ad performance / ROI**, with upwards of 45% increase a year after¹.



Gain competitive advantage

Differentiate your agency with exclusive access to Google's proprietary measurement solutions. Companies that excel at marketing analytics see **1.4x faster revenue growth** and **2.1x faster profit growth** than their peers².

Powering Harmelin's Measurement Approach

As Harmelin's measurement architecture continues to evolve around three key reporting views (Business, Marketing, and Media), partnering with Google to strengthen our data signals and leverage toolsets to plus up our client's reporting outputs is key

Reports deliver information. Measurement delivers insight.

Measurement is the discipline that connects data across every report.

Our north star: marketing must deliver real-world returns — not just platform attribution.

Harmelin's Reporting Ecosystem

Three connected reports strengthened by actionable data from Google.

Business reporting

Did we drive key business outcomes?

THE REPORT CAN SHOW

Sales, Revenue, etc.

GOOGLE FUELS IT WITH

n/a – Client business data ingested directly by Harmelin

Marketing reporting

Did we move demand & perception?

THE REPORT CAN SHOW

Branded search lift · brand recall
brand consideration · audience growth

GOOGLE FUELS IT WITH

Attributed Branded Searches
Google Query Data
Search Lift studies

Media reporting

Did our ads resonate with consumers?

THE REPORT CAN SHOW

Impressions · clicks · conversion/leads
CPM · CPC · CPA

GOOGLE FUELS IT WITH

Google Tag Gateway
Enhanced Conversions for Web/Leads
PDM profit signals
Qualified Future Conversions

Monitor vertically, analyze horizontally

Vertical Monitoring

“What happened” within one signal set — always-on dashboards, refreshed as new data arrives.

Strengthened by Google’s live signals:

- GA4 attribution & conversions
- Real-time bidding signals
- Data Strength dashboards

Horizontal Analysis

“Why it matters” across signal sets — periodic deep-dives. Home of the Measurement Trifecta:

- **Incrementality** — channel evaluation for planning
- **Multi-Touch Attribution** — analyzing path to conversion
- **MMM** — cross-channel budget planning allocation



Summary + Next Steps



Key takeaways

Search is becoming a conversation

Search is no longer just keyword based, it's about conversations and intent, with AI using signals from across the Google ecosystem to power targeting

Google is truly an ecosystem

Where you once thought of Google as just search, you now must think of it as a true ecosystem with multiple touch points and products that work throughout the funnel to drive key business outcomes

Testing is non-negotiable

If you're not already live on parts of the Google Power pack, now is the time to test into it, even if you've tried previously.

Feed the algorithm

Leveraging 1st party data via online and offline conversion data strengthens the algorithm's signals, and ultimately will help produce stronger measurement opportunities moving forward



Next steps

Meet with your Harmelin & Google Teams

Your Harmelin team will work to schedule collaborative meetings between your Client team, Harmelin and Google to help you :

- Better understand Google's Power Pack offerings
- Discuss testing opportunities
- Position your brand for success as the Google ecosystem continues to evolve

Strengthen Paid and Organic Keywords

Harmelin will be working to add more conversational keywords to your existing paid keyword set, and has an exceptional SEO team with offerings to strengthen your organic keywords for this new, AI first world, as well.

Re-consider measurement

We are looking for opportunities to engage in deeper conversations with our clients about strengthening measurement for your brand, feeding the algorithms with valuable 1st party data, and ensuring our measurement structure ties media results to business outcomes, either directly or via mutually agreed upon proxies