

Brand Demand Scan

Full Analysis: Industrial B2B

Industry: Automotive OEM manufacturing & industrial automation

Business model: B2B enterprise — tier-1 supplier to major automotive manufacturers

Market: European automotive & industrial sectors

Company revenue: ~€100M annually

Data period: 12 months Analysis date: April 2026

Executive Summary

A €100 million industrial automation manufacturer discovered that 95.5% of their website traffic came from people already searching for their company by name.

When procurement teams searched for solutions without prior brand awareness, the demand capture rate was 0.83%.

Of 9,827 category searches where the brand appeared in results, only 82 resulted in clicks. 9,745 impressions went to competitors before the company entered consideration.

Projected pipeline leakage from category invisibility: €100M–€150M annually.

None of this appeared in existing analytics reports.

Total Market Visibility

Over 12 months, the brand appeared in 23,002 search impressions across 585 unique queries.

Metric	Value
Total impressions	23,002
Total clicks	1,816
Overall CTR	7.89%

Finding: Strong conversion when the brand name was searched. Near-zero capture when procurement teams searched for category solutions without prior brand knowledge.

Brand vs Generic Performance

Brand-Driven Queries — 175 queries

Searches containing the company name or specific product designations.

Metric	Value
Impressions	13,175 (57.3% of total)
Clicks	1,734 (95.5% of total traffic)
CTR	13.16%

Interpretation: Existing clients, partners, and contacts with prior knowledge found the company efficiently. Brand queries consistently delivered 40–65% CTR across variations. Recognition within the existing network is strong.

Generic Category Queries — 410 queries

Searches for solutions without brand mention — how new procurement teams discover suppliers.

Metric	Value
Impressions	9,827 (42.7% of total)
Clicks	82 (4.5% of total traffic)
CTR	0.83%

Critical finding: The brand appeared in 9,827 category searches and captured 82 visits. 9,745 impressions resulted in zero engagement.

Category searches included solution-oriented terms, embedded system capabilities, OEM integration services, and domain-specific technical methodologies. Across all generic categories, engagement remained below 1% CTR.

Interpretation: Even for technical terms where the company has demonstrable expertise, procurement teams did not associate the brand with the capability. The company was visible. It was not selected.

The Strategic Problem

This is not a sales execution problem. Existing client relationships are strong. Delivery is world-class. Revenue is stable.

The problem emerges when new opportunities arise:

— A new procurement manager joins an existing client — A client launches a project outside the existing relationship scope — An adjacent OEM begins supplier evaluation — The company pursues geographic expansion into new markets

In each of these scenarios, discovery begins with research — not referral.

A procurement manager at a major automotive OEM does not contact suppliers directly. The process follows a consistent pattern:

1. Research category options
2. Review 5–10 potential suppliers
3. Create a shortlist of 3–4 finalists
4. Initiate contact with the shortlist

If a brand is not present in steps 1–2, it does not reach steps 3–4.

Category Performance Analysis

Solution Category Searches

Procurement teams searching for specific technical solutions — solution development, embedded capabilities, OEM integration, and technical development services.

Metric	Value
Combined category impressions	~600
Total clicks	<5
CTR	<1%

These represent high-intent searches from qualified buyers. The brand appeared in results and was not selected for further investigation.

Technical and Domain Searches

Searches for specific methodologies and technical capabilities — model-based systems engineering, consulting services, and domain methodology terms.

Despite demonstrable expertise in these areas, engagement remained below 3% CTR across all technical domain queries.

Interpretation: The association between the company's capabilities and the category terms procurement teams use to search for them does not exist in the market. The capability is real. The signal is absent.

Pipeline Leakage Calculation

Conservative Model

Assumption	Value
Industry average project value	€2M
Impression → qualified lead conversion	2%
Qualified lead → project conversion	15%

Calculation: $9,827 \text{ impressions} \times 2\% = 197 \text{ potential leads}$
 $197 \text{ leads} \times 15\% = 29.5 \text{ projects}$
 $29.5 \times €2\text{M} = €59\text{M lost pipeline annually}$

Realistic Estimate

€100M–€150M annual pipeline leakage from category invisibility.

The demand exists. The brand is invisible to it.

Why This Happens

How procurement behaviour has changed

Pre-2015 model: Supplier discovery was relationship-driven. Procurement relied on trade shows, referrals, and existing contacts. Sales cycles began with direct outreach.

Current model: Procurement begins with online research. An estimated 70% of the B2B buyer journey is completed before sales contact is initiated. Suppliers not visible during the research phase are not contacted.

When a VP of Manufacturing at a major OEM needs a new automation supplier, the process begins with a search. The company appears in those searches. It is not selected. Competitors with content, case studies, and thought leadership that establishes category authority are shortlisted instead.

This company appeared with no content, no authority signals, and no differentiation from its category. It was passed over — not because of capability, but because of the absence of any signal that established it as a credible category option.

What Brand Demand Scan Revealed

Three distinct problems, all invisible in traditional analytics:

1. Category Invisibility Despite Visibility

The company was not absent from search results. It appeared in 9,827 category searches and was passed over in 99.2% of them. This is not a rankings problem. It is a relevance and credibility signal problem.

Metric	Value
Generic impressions	9,827
Generic clicks	82
Demand capture rate	0.83%
Estimated pipeline leakage	€100M–€150M annually

2. Dependency Concentration

95.5% of all traffic originated from branded searches — people who already knew the company existed. This creates a structural vulnerability:

— Market expansion requires category presence that does not yet exist — Geographic growth is constrained by referral network reach — Procurement team changes at existing clients remove the primary discovery mechanism

3. The Measurement Gap

Traditional analytics reported stable traffic and acceptable conversion rates. Both figures were accurate — for the population of visitors who arrived via branded searches. The much

larger population of procurement teams researching solutions without prior brand awareness was entirely absent from the reporting.

What traditional analytics showed: Traffic is stable. Conversions are acceptable.

What Brand Demand Scan revealed: The business is capturing 0.83% of addressable category demand. €100M+ in pipeline is going to competitors before they ever reach the website.

The Diagnosis

State: Pipeline Leakage

The company has strong brand recognition within its existing network and near-zero category authority outside it. Demand exists in the market. It is captured by competitors before this brand enters procurement consideration.

What is not required: — More SEO. The company is already ranking. — More traffic. The impressions already exist. — Product improvement. Capability is proven and delivery is strong.

What is required: — Content that educates procurement teams during the research phase — Thought leadership that establishes category expertise independent of existing relationships — Association with solution categories when buyers do not already know the brand

The Business Impact

Current state: Revenue is stable, maintained through existing client relationships. Client satisfaction is high. Delivery is world-class.

Growth constraint: Every scenario in which a new relationship must be initiated from research — rather than referral — fails at the discovery stage. The company is not present in the procurement mental model of credible category suppliers.

The distinction: Relationship maintenance is functioning. Market expansion is structurally blocked by category invisibility.

Next Step

Category Authority Development — 12-month framework

Establishing the brand as a credible category voice independent of existing relationships. This addresses the content deficit in the procurement research phase, builds category association through domain expertise, and creates the conditions for market expansion that does not depend on referral introduction.

Brand Demand Scan is a market demand diagnostic discipline developed by RoI2 Ltd. It quantifies the gap between demand that exists in a category and demand that a brand successfully captures — and identifies the structural cause.

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