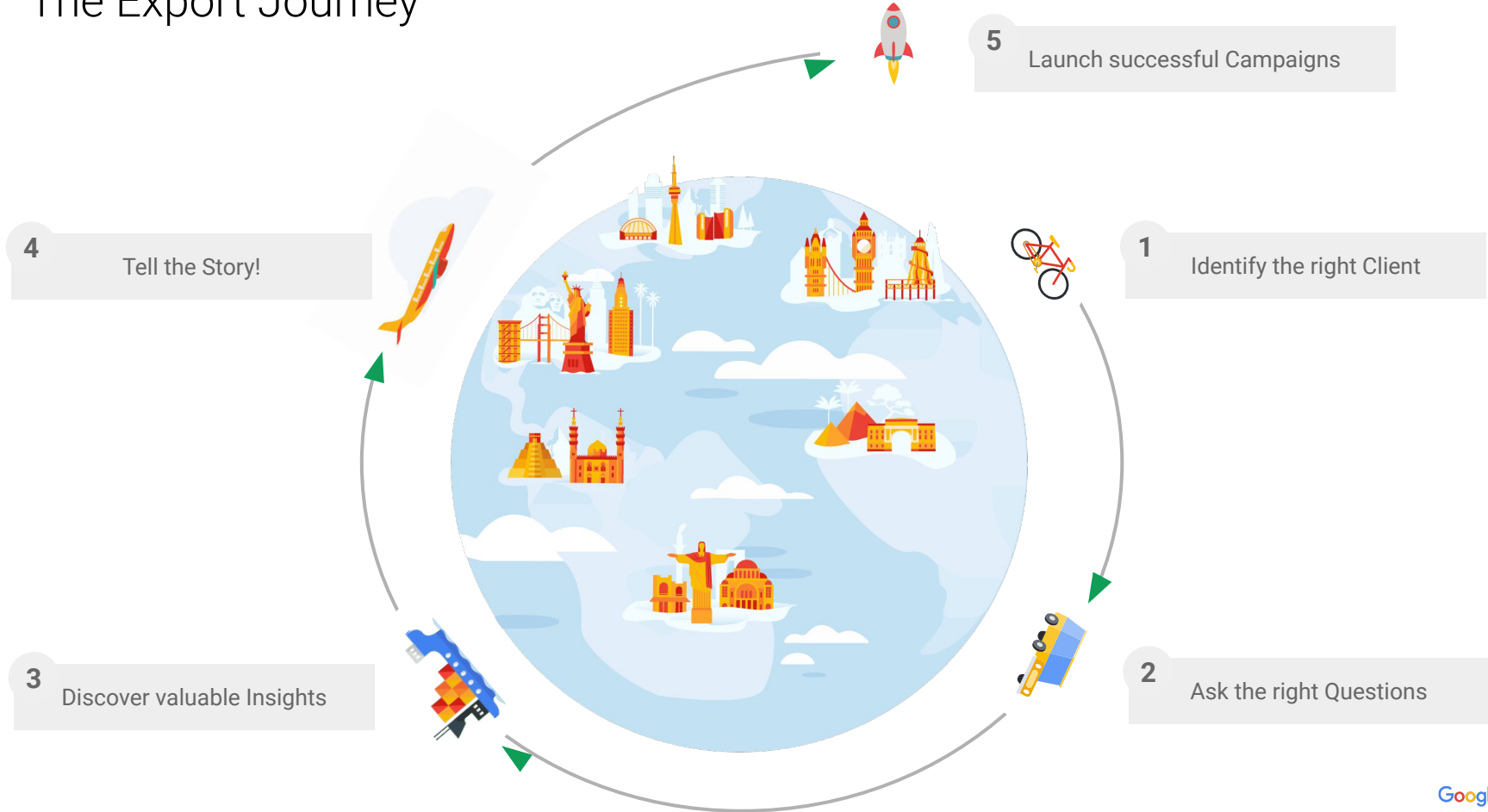If you want to replicate the deck please ask your Google POC for the slides version

Google Partners

International Growth Strategy
Playbook

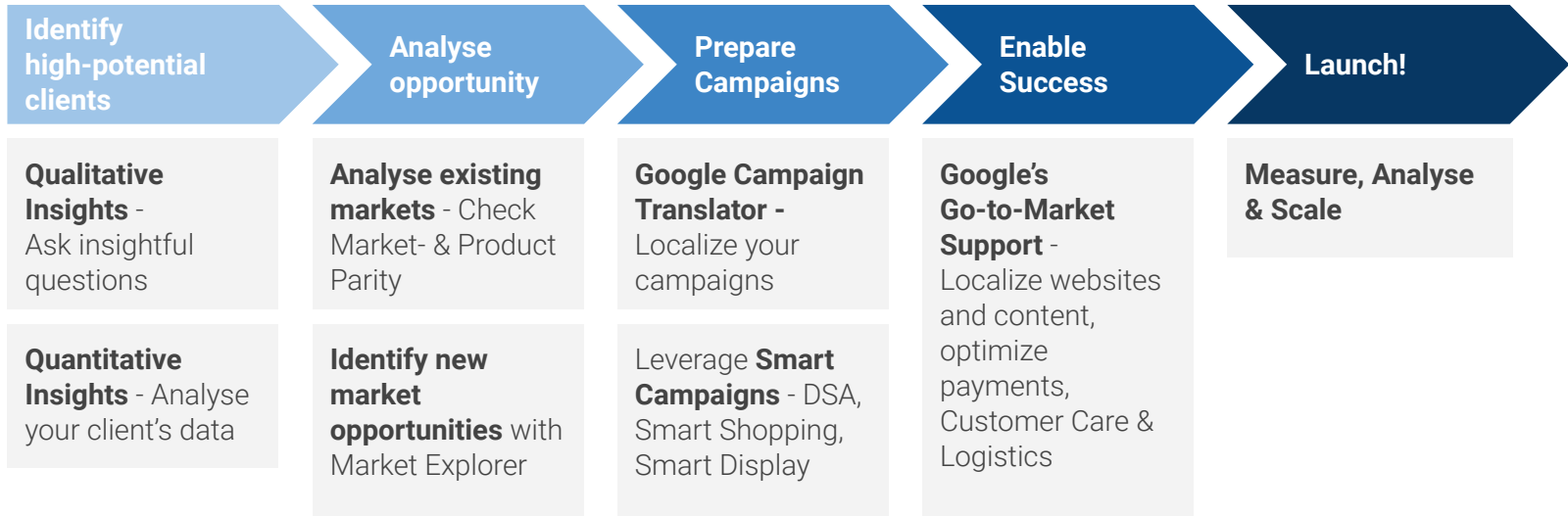# International Growth Playbook for Agencies

This Playbook provides a structured approach to tackling internationalization with your clients. The first part of the deck serves as a guideline for you whereas in the second part you can find ready made pitch templates to leverage and tell the story. The green/blue slides serve as instructions on how to build the corresponding slides, which tools to use and where to find the information.

- **Step 1:** For all international pitches, begin with background research, by determining what type of exporter your client is, asking the Discovery Questions and completing the Business Readiness Checklist to determine your client's readiness to export, as well as which pitch is most appropriate for them

- **Step 2:** Choose one of two structured plays to customize, based on client status with regard to local language website experiences and local language Google Ads campaigns

- **Step 3:** Customize chosen structured play according to slides with information found either on the "how to" Slides or on the right side of each slide

- **Step 4:** Size the opportunity using MarketExplorer

- **Step 5:** Watch clients succeed, garner much fame and fortune

Google

Determine client scenario and proceed

START HERE

Assess client readiness to export

Discovery Questions to understand your client's readiness before proceeding

Leverage **Marketfinder** to seed initial interest with your client

A) Grow existing markets

Multiple sites in local language

Multiple local language campaign

Link to slides

Get an overview of existing markets

Create Marketparity & Benchmark Analysis

Launch localized campaigns

Optimize localized campaigns

B) Footprint Expansion

1 or more sites in local language

1 or more local language campaign

Link to slides

Use MarketExplorer to identify market opportunities

Create Marketanalysis and Calculate Opportunity

Leverage Google Consults to overcome operational hurdles

Optimize localized campaigns

Google

The International Growth Workflow:
Help your clients succeed in international markets

Identify high-potential clients	Analyse opportunity	Prepare Campaigns	Enable Success	Launch!
Qualitative Insights - Ask insightful questions	**Analyse existing markets** - Check Market- & Product Parity	**Google Campaign Translator -** Localize your campaigns	**Google's Go-to-Market Support** - Localize websites and content, optimize payments, Customer Care & Logistics	**Measure, Analyse & Scale**
Quantitative Insights - Analyse your client's data	**Identify new market opportunities** with Market Explorer	Leverage **Smart Campaigns** - DSA, Smart Shopping, Smart Display		

Google

Look out for key indicators on how to spot opportunities

Overarching relevant factors to identify valuable IG clients (other than **client relationship** and **business plans**) are **Export revenue size**, **Export Revenue YoY, Export Revenue Share** (vs Domestic), **Export Growth Contribution**

Strong international footprint

Pure Online Players

Vertical Affinity to internationalization

> Regulatory barriers (high barrier for e.g. online gambling)
> Cultural fit (low barrier for e.g. apparel)
> Language barriers (low barrier for e.g. B2B since English landing pages might be fine to start with)
> Ease of scaling product & operations (low barrier for e.g. game app developers)

Google

What Type of Exporter Is Your Client?

transformational → incremental

New to Export
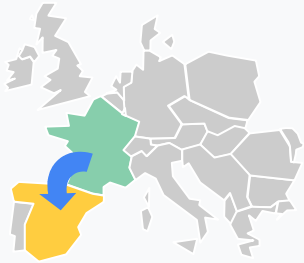
begin marketing in new countries, for companies only spending in one

Marketing Footprint Expansion
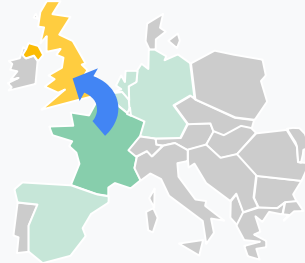
begin marketing in new countries, for companies already spending in 2+ countries

Incremental Export
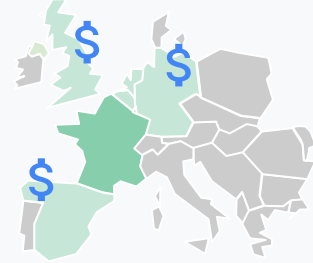
increase investment in countries with current spend

Google

Ask insightful questions when exploring export opportunities

How do your Growth
Plans look like?
(1-3 years horizon)

Where is your
competition?

How does your
decision process
work?

What does
success look
like?

What is potentially
holding you back?

Discovery Questions: New to Export

1. What are your business objectives for the next X years?

2. Who do you see as your main competitors?

3. What is your competitive advantage?

1. What is the next growth opportunity for your business?
2. What opportunities do you see internationally?
3. What barriers do you see internationally?
4. What markets have you considered and why?
5. What information/metrics would help you with your decisions?
6. How prepared is your business for this change?
7. Who will be making the decisions and who do you need to influence?

Discovery Questions: Existing Exporter

1. How did you decide to invest in your current markets?
2. What did you learn/what would you do differently?
3. What differences have you noticed between the performance of your business in X and Y?
4. How do you benchmark performance by markets?
5. What markets are you most satisfied with?
6. Which markets do you see further growth in?
7. What is your brand strategy when entering a new market?
8. What markets are you considering next and why?
9. What markets have you ruled out and why?
10. What information would help you with your decisions?
11. How prepared is your business for this change?
12. Who will be making the decisions and who do you need to influence?

Google Partners

Deeper Discovery Questions: All

1. How will you localize your website?
2. How do you localize your products?
3. What payment methods do you offer?
4. What customer service methods do you use? How will you support customers in your new market?
5. What logistics issues do you see (if any)?
6. Are there any legal or regulatory issues to address?
7. How will you manage your international marketing?
8. How will your allocate budgets?
9. How will you set performance goals? Will these differ by market/stage?
10. Are there other stakeholders/partners/agencies who will be involved?

Google Partners

Agenda

1 Opportunities in current markets
Headroom and Challenges in our existing set-up

2 High Potential new markets
Analysis of new market opportunities

3 Next Steps

Google Partners

START HERE

👤

Assess client readiness to export

[Discovery Questions](#) to understand your client's readiness before proceeding

Leverage [Marketfinder](#) to seed initial interest with your client

Determine client scenario and proceed

A) Grow existing markets

Multiple sites in local language

Multiple local language campaign

Get an overview of existing markets

Create Marketparity & Benchmark Analysis

Launch localized campaigns

Optimize localized campaigns

B) Footprint Expansion

1 or more sites in local language

1 or more local language campaign

[Link to slides](#)

Use MarketExplorer to identify market opportunities

Create Marketanalysis and Calculate Opportunity

Leverage Google Consults to overcome operational hurdles

Optimize localized campaigns

Google

There are a range of approaches suitable to many clients

Short-/ Mid Term Opportunities

Parity Pitches		Add Languages
Market Parity	Product Parity	EN in non-EN markets
Investment vs. Market Size	GDN vs. Search vs. YT	Rest-of-World
PLA vs. Text Ads		

Google

Opportunities in current markets

x% of 'Toys & Games' queries are searched for abroad
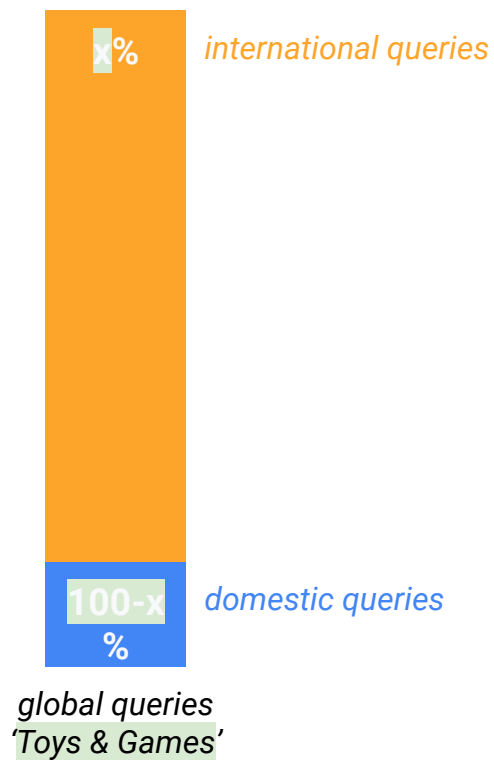
x% *international queries*

100-x% *domestic queries*

global queries
'Toys & Games'

95% of 'Toys & Games' queries are searched for abroad

95.2% *international queries*

4.8% *domestic queries*

global queries
'Toys & Games'

Revenue Opportunity per Year in existing markets

€XXX

*based on current CTR, CVR & basketsize

Google Partners

Goal
Identify growth opportunities for the client overall

Tipp
Calculate this slide at the end of your analysis but use to catch the the client's attention at the beginning

Data & Sources
Spend Data by Country (Market Scorecard Dashboard or Ads Geo Report)
Market Size Data (MarketExplorer)
CTR, CVR, Average Order Value (Google Ads & Google Analytics)

Approach
Index reference market (e.g. domestic) = 100%, then benchmark market sizes and investment against
domestic market (see next slide). Multiply the Headroom with the CTR, CVR and Avg. Order Value per country.

Tools
MarketExplorer
Google Ads & Analytics Data

Revenue Opportunity per Year in existing markets

€63,000,000

There is big untapped potential in the UK & France

Market Size & Investment Comparison

UK has the biggest market size for Toys & Games followed by Germany and France

UK has 1.5x the market of DE but 0.2x the investment

Investment opportunity based on volume and cost vs DE benchmark per Quarter

UK	$750k
FR	$460k
ES	$215k
IT	$165k
NL	$182k

Google Partners
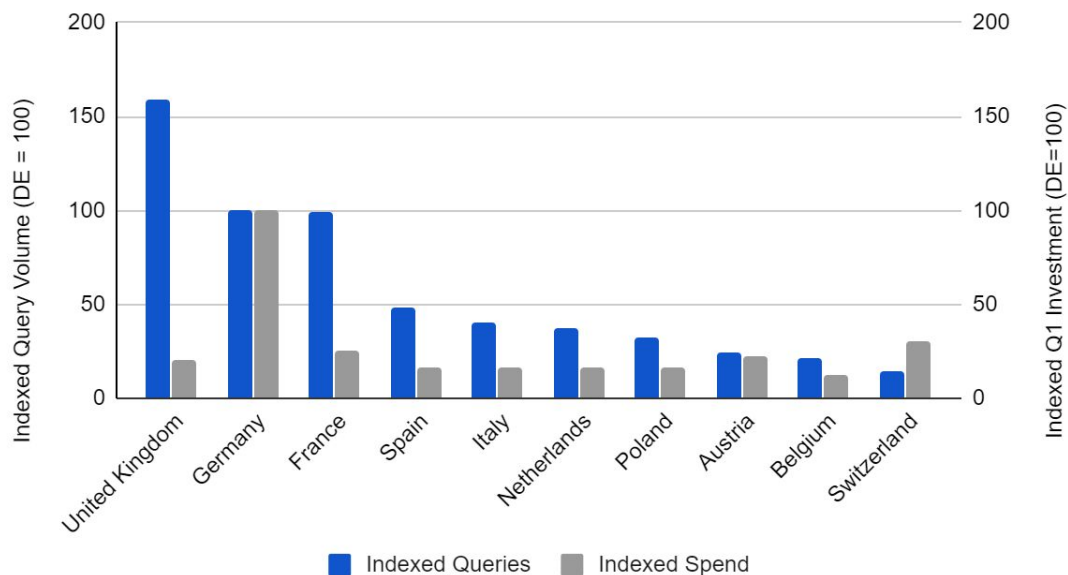
Goal
Identify growth opportunities in intl markets by benchmarking investment vs market size to the domestic market.

"IT is 0.4 of DE but you only spend 0.17x"

Data & Sources
Spend Data by Country (Market Scorecard Dashboard or Ads Geo Report)
Market Size Data (MarketExplorer)

Approach
Index reference market (e.g. DE) = 100, then benchmark market sizes and investments against domestic market. Difference in spend and size benchmark can be used to calculate budget opportunities.

Recommendation
Include Account performance data (depending on the client's goals: Conversions, CVR, CPA, ROAS) and shift conversation to *"IT is 0.4 of DE but you only spend 0.17x **even though your CVR is 20% higher than in DE**"*

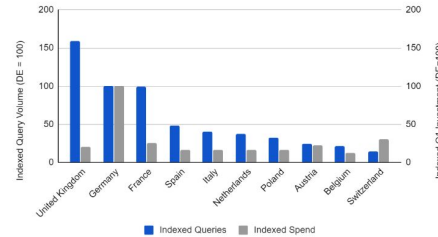Close/narrow gaps by drilling down into the potential (see following slides)

Tools
MarketExplorer
Market Scorecard DataStudio Dashboard

There is big untapped potential in the UK & France

Market Size & Investment Comparison

UK has the biggest market size for Toys & Games followed by Germany and France
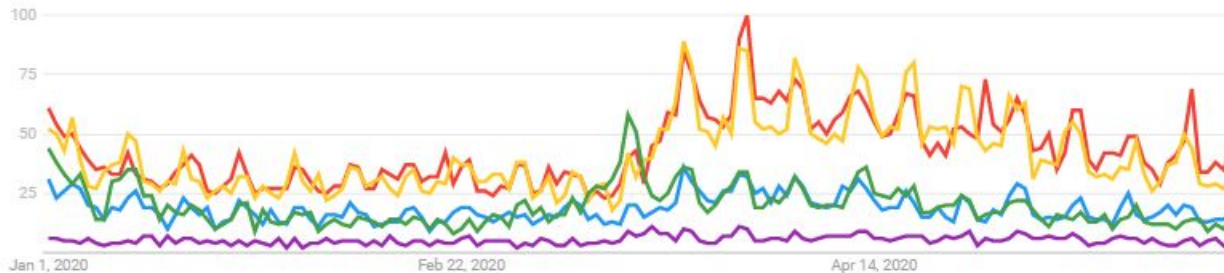
UK has **1.5x** the market of **DE** but **0.2x** the investment

Investment opportunity based on volume and cost vs DE benchmark per Quarter

UK	$750k
FR	$460k
ES	$215k
IT	$165k
NL	$182k

Google

Demand for Board Games is lead by UK & France

Interest over time for 'Board Game'

Germany
UK
France
Italy
Spain

Focusing on Board Games the **UK** and **France** are ahead of other countries with roughly double the demand than in Germany.

All countries see exceptional growth in 2020 with **France reaching x% YoY** (vs x% UK, x% DE, x% IT and x% ES)

Google Partners

Goal
Include up-to-date insights to make sure your recommendations aren't redundant yet and create urgency.

Data & Sources
Category Search Volume (Quick Insights on Google Trends)

Approach
Use the countries you have identified the biggest opportunities for in the previous slides. Choose your clients category and the timeframe you want to look at (e.g. since the beginning of the year until now). Take a screenshot of the chart and make sure to check the whole slide for interesting insights on market level.

Recommendation
You can also download the data and create your own chart or calculate YoY developments for the most recent time periods.
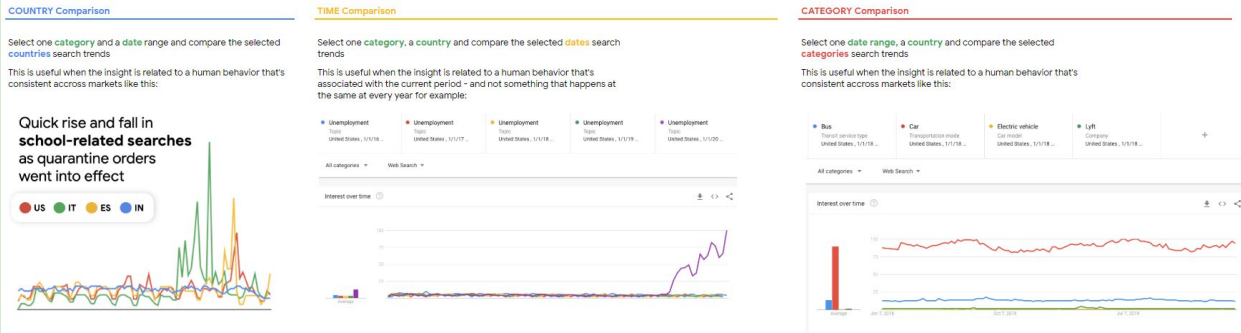
Tools
Quick Insights on Google Trend

Demand for Board Games is lead by UK & France

Interest over time for 'Board Game'

Focusing on Board Games the **UK** and **France** are ahead of other countries with roughly double the demand than in Germany.

All countries see exceptional growth in 2020 with **France reaching 67% YoY** (vs 54% UK, 35% DE, 56% IT and 25% ES)

- Germany
- UK
- France
- Italy
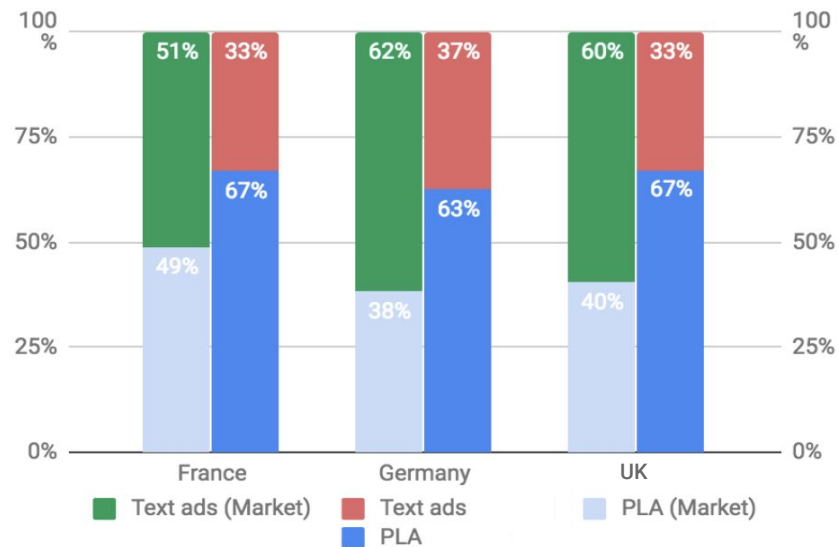- Spain
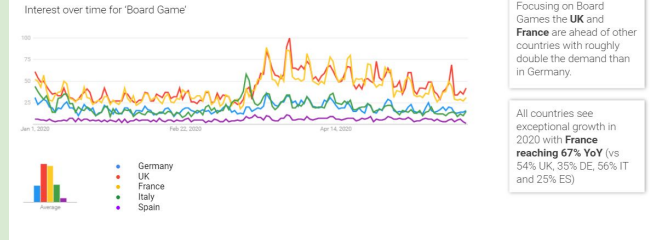
Google

Tools Introduction   [Quick Insights on Google Trend](#)

You should use this tool for generating insights in 3 ways: Country Comparison, Time Comparison & Category Comparison

COUNTRY Comparison

Select one category and a date range and compare the selected countries search trends

This is useful when the insight is related to a human behavior that's consistent across markets like this:

Quick rise and fall in **school-related searches** as quarantine orders went into effect

US · IT · ES · IN

TIME Comparison

Select one category, a country and compare the selected dates search trends

This is useful when the insight is related to a human behavior that's associated with the current period - and not something that happens at the same at every year for example:

CATEGORY Comparison

Select one date range, a country and compare the selected categories search trends

This is useful when the insight is related to a human behavior that's consistent across markets like this:

Google search source	Web Search (default)	

Country Comparison

| Category filter | M&E |
| Topic | board_game |

		start	end
Countries	DE		
(up to five)	GB		
	FR		
	IT		
	ES		

| Start date | 2019-01-01 |
| End date | 2020-06-01 |

Click on Link Below to see in Google Trends:

Trends for [board_game], DE,GB,FR,IT,ES, between 2019-01-01 and 2020-06-01

Date Comparison

| Category filter | Health |
| Topic | exercise |

	start	end
Dates	2018-01-01	2018-05-29
(up to five)	2019-01-01	2019-05-29
	2020-01-01	2020-05-29

| Country | GB |

Click on Link Below to see in Google Trends:

Trends for [exercise], GB and multiple dates

Topic Comparison

| Countries | IT |

Category filter	HPC/Beauty
Topic	lipstick
(up to five)	concealer
	moisturizer
	sunscreen
	foundation

| Start date | 2020-01-01 |
| End date | 2020-06-01 |

Click on Link Below to see in Google Trends:

Trends for [lipstick, concealer, moisturizer, sunscreen, foundation], IT, between 2020-01-01 and 2020-06-01

Google

'Client' is highly underinvested in Text Ads/PLA

Click Composition: Market vs. Fantasy Toys

Recommended Action:

- **Expand the generic Keyword set** in our high margin Product categories
- Leverage **Google Campaign translator** to bring our best performing Search Campaigns to other markets

Source: Internal Google Data & Analysis. Data is confidential, do not share, Category: Toys & Games

Google Partners

Goal

Avoid reaching a glass ceiling in growth, show growth opportunities by benchmarking client's clicks distribution to the market click distribution

"In UK 40% of clicks are on Text Ads, you got 20%"

Data & Sources

Your Account Mgmt teams from Google can provide you with data on PLA / Text Ad click distribution. Match it with your client's data from Google Ads

Approach

Show client's PLA/Text click distribution in each country compared to the market

Recommendation

Include Account performance data (depending on the client's goals: Conversions, CVR, CPA, ROAS) and shift conversation to *"In UK 40% of clicks are on Text Ads, you got 20% **even though 25% of your conversions come from Text Ads**"*

Text Ad share too low: KW expansion (higher bids, Campaign Translator, more ads / formats (RSA etc)
PLA share too low: add audience lists, higher bids, optimize page feed etc.

Tools

Keyword Expansion
Campaign Translator (ask your AM)

Google Support needed

Dreamed-up Toys is highly underinvested in Text Ads
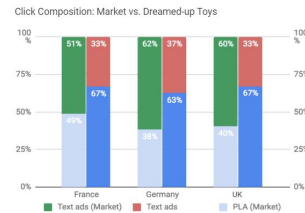
Click Composition: Market vs. Dreamed-up Toys

Recommended Action:
- **Expand the generic Keyword set** in our high margin Product categories
- Leverage **Google Campaign translator** to bring our best performing Search Campaigns to other markets

Additional Language Opportunities

Localisation

Existing   New

New

Markets

	Existing	New
New	Rest-of-World Campaigns Same Language Markets	In-depth local market strategy
Existing	Complement Languages	Usually low opportunity

Google Partners
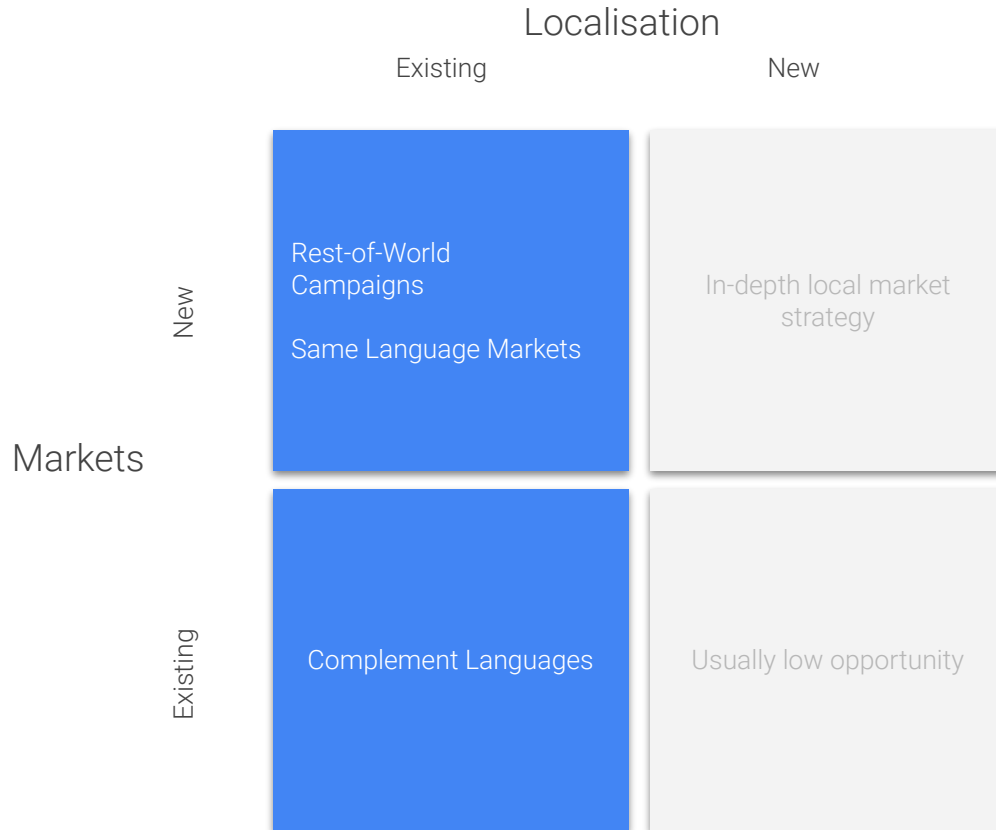
Same Language countries*

English	Spanish	French	German	Arabic	Portuguese	Chinese

United States
Canada
United Kingdom
Ireland
Australia
New Zealand
India
South Africa
Singapore
Philippines
UAE

Spain
Mexico
Argentina
Chile
Peru
Colombia
Guatemala
Honduras
Nicaragua
Ecuador
Bolivia
Uruguay
Paraguay

France
Canada
Luxembourg
Belgium
Switzerland
Algeria
Morocco
Tunisia
Cameroon
Chad
Laos

Germany
Switzerland
Austria

UAE
Egypt
Iraq
Algeria
Morocco
Tunisia
Oman
Qatar
Chad
Eritrea
Somalia

Portugal
Brazil

Traditional:
Taiwan
Hong Kong

Simplified:
Singapore
China*

* display-only opportunity (no search or youtube)

*Lists are not exhaustive

Google

Adding English campaigns to all countries gives <mark>xx</mark>% volume boost

English queries in non-english speaking European countries
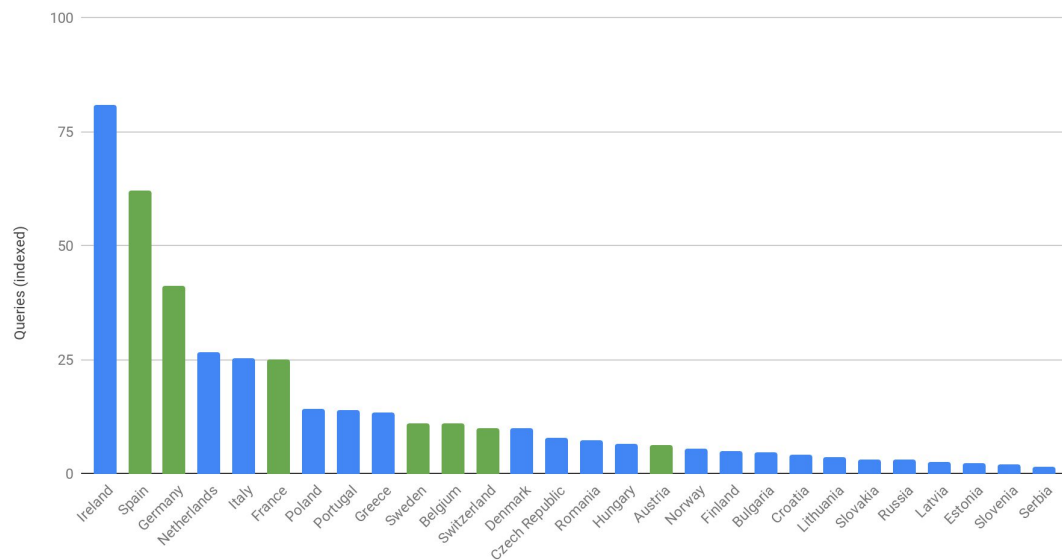
Live countries

Adding EN campaigns to live countries can give additional volume worth x% (= one third of the DE market size)

Not live european markets (ex EN speaking countries)

Creating Rest-of-Europe campaigns with English ad copies and keywords could boost overall volume by +x%

Recommendation:

- Set up own EN campaigns for these markets
- Set up RoE campaigns exl. Live markets (see above)

Goal
Find incremental growth opportunities in existing languages.
"There is an add. 13% vol if you opt in EN in ES"

Data & Sources
Language split info for vertical (MarketExplorer)

Approach
Select client's categories & the desired language in MarketExplorer (e.g. EN) to see demand in non-EN speaking countries for EN queries. Check against traffic in Google Analytics to verify / build argument.

Recommendation
Divide into incremental reach for existing countries and reach for RoW campaigns in new countries.

Larger countries should get their own EN speaking campaigns while smaller ones can be bundled.

Tools
MarketExplorer
Google Analytics

Adding English campaigns to all countries gives 72% volume boost

English queries in non-english speaking European countries
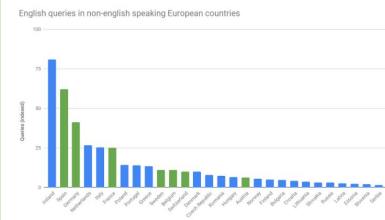
Live countries
Adding EN campaigns to live countries can give additional volume worth 21% (= one third of the DE market size)

Not live european markets (ex EN speaking countries)
Creating Rest-of-Europe campaigns with English ad copies and keywords could boost overall volume by +51.2%

Recommendation:
● Set up own EN campaigns for these markets
● Set up RoE campaigns exl. Live markets (see above)

Google Analytics Data

	Language	Users
		1,657,337
		% of Total: 100.00% (1,657,337)
1.	en-us	64.91%
2.	en-gb	6.09%
3.	es-es	2.17%
4.	pt-br	2.15%
5.	en-ca	1.74%
6.	en-au	1.63%
7.	es-xl	1.29%
8.	ru-ru	1.21%
9.	zh-cn	1.12%
10.	it-it	1.08%

Languages ⓘ

Query share (%)

English	44
German	36.33
Russian	14.66
Ukrainian	1.51
French (France)	0.94
Other	2.29

VIEW ALL

Google

Localize campaigns with Google's Campaign Translator

Same quality process that Google uses for their own translations: state-of-the-art technology plus quality review by 2 professional translators

4 business days average turnaround time

Supports search campaigns, display campaigns and App Campaigns (keywords, text ads, sitelink extensions, callout extensions)

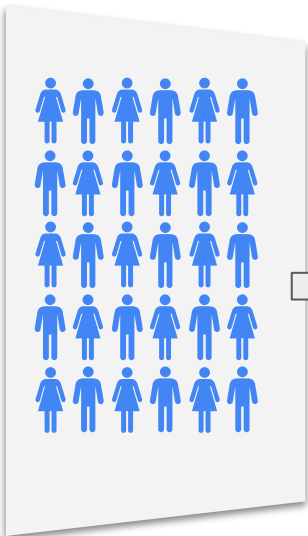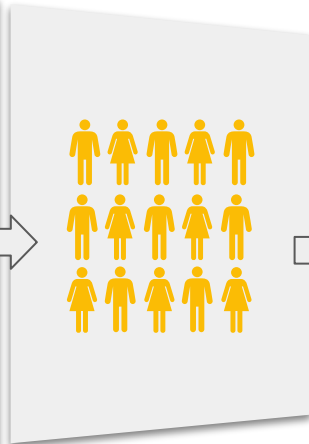More than 200 language pairs available and source campaign does not have to be in English

Google Partners

GBS GO Consult - The Customer Journey

Stage 1.

Stage 2.

Stage 3.

Stage 4.

Starts Search

Makes Purchase

1. Homepage Experience

- **Landing Page** effectiveness & placements

2. Product Page

- Engagement & Drivers
- **Support effectiveness**: FAQs, Channels of Support, Tech
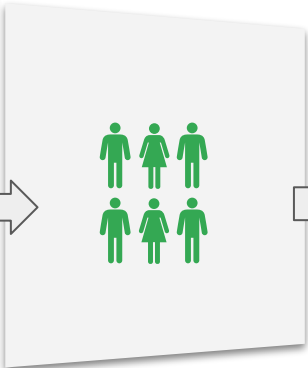
3. Add to Cart

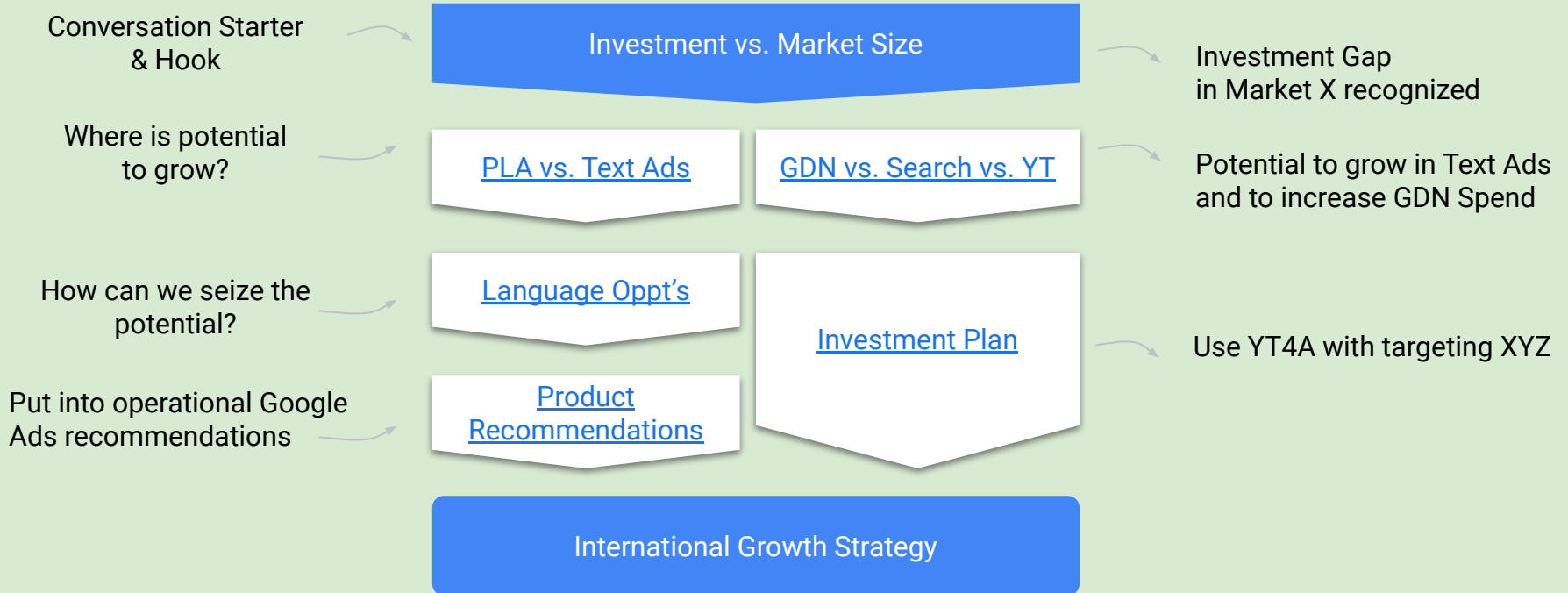- **Logistics:** Delivery Options, Timelines, Fulfillment & Returns
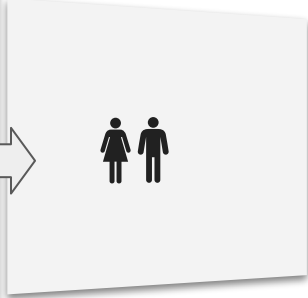
4. Conversion Funnel

- Localised **payment methods**
- Seamless **Checkout** Experience

What to expect : ✓ Market Insights ✓ Competitor Examples ✓ Best in class industry examples ✓ Action Plan ✓ Partner Referrals

Google Partners

All approaches can be combined to form a cohesive pitch

Conversation Starter & Hook

Where is potential to grow?

How can we seize the potential?

Put into operational Google Ads recommendations

Investment vs. Market Size

PLA vs. Text Ads

GDN vs. Search vs. YT

Language Oppt's

Investment Plan

Product Recommendations

International Growth Strategy

Investment Gap in Market X recognized

Potential to grow in Text Ads and to increase GDN Spend

Use YT4A with targeting XYZ

Google

Opportunities in existing markets

Country	Recommended Investment	Estimated Impressions	Estimated Clicks	Estimated Conversions
Same Language Countries (English)	$###	###	###	###
United Kingdom	$###	###	###	###
France	$###	###	###	###
Spain	$###	###	###	###
Italy	$###	###	###	###
Netherlands	$###	###	###	###
Total	**$###**	**###**	**###**	**###**

Google Partners

Goal
Identify growth opportunities for the client overall and break down by KPI

Data & Sources
Spend Data by Country (Market Scorecard Dashboard or Ads Geo Report)
Market Size Data (MarketExplorer)
CTR, CVR, Average Order Value (Google Ads & Google Analytics)

Approach
Index reference market (e.g. domestic) = 100%, then benchmark market sizes and investment against domestic market (see next slide). Muliply the Headroom with the CTR, CVR and Avg. Order Value per country:

- Determine **relative available volume** for client's category in each country using **MarketExplorer**

- Use **MarketExplorer** to determine **relative CPC**

- **Use client benchmark in homecountry as baseline** to calculate impressions, clicks, and cost

- Even better: use client's AOV to calculate Estimated Revenue, and add as additional column

Tools
MarketExplorer
Google Ads & Analytics Data

Google

Potential new markets

Determine client scenario and proceed

START HERE

Assess client readiness to export

Discovery Questions to understand your client's readiness before proceeding

Leverage Marketfinder to seed initial interest with your client

A) Grow existing markets

Multiple sites in local language

Multiple local language campaign

Link to slides

Get an overview of existing markets

Create Marketparity & Benchmark Analysis

Launch localized campaigns

Optimize localized campaigns

B) Footprint Expansion

1 or more sites in local language

1 or more local language campaign

Use MarketExplorer to identify market opportunities

Create Marketanalysis and Calculate Opportunity

Leverage Google Consults to overcome operational hurdles

Optimize localized campaigns

Google

Based on the country score the US, Poland and Turkey look as the most promising markets to enter

Metrics	Weight	United States	Poland	Turkey	Brazil	Australia	Netherlands	Czechia
Category Interest	●●●●	100pts	12pts	12pts	30pts	10pts	7pts	3pts
Category Interest Growth	●●○○	10pts	100pts	54pts	56pts	52pts	29pts	82pts
Category Interest Per Capita	●●●○	65pts	70pts	34pts	31pts	90pts	100pts	62pts
Category Cost	●●●○	7pts	36pts	87pts	50pts	7pts	11pts	15pts
Google Query Coverage	●●○○	37pts	35pts	37pts	37pts	41pts	33pts	33pts
Country Score		50pts	45pts	42pts	39pts	36pts	34pts	33pts

Google Partners

The weighting depends on the client's goals and industry

Highly competitive industry

Metrics	Weight
Category Interest	●●●○
Category Interest Growth	●●●○
Category Interest Per Capita	●●○○
Google Query Coverage	●●●●
Category Cost	●●●●
Country Score	

Branding Focus

Metrics	Weight
Category Interest	●●○○
YouTube Reach	●●●●
Category Interest Growth	●●○○
YouTube Unique Users	●○○○
GDN Reach	●●●○
GDN Unique Users	●○○○
Category Interest Per Capita	●●●●
Country Score	

Luxury goods industry

Metrics	Weight
Category Interest	●○○○
Category Interest Growth	●●●○
Category Interest Per Capita	●●●○
GDP PPP	●○○○
GDP Growth	●●●○
GDP Per Capita	●●●○
Category Cost	●○○○
Country Score	

Keep in mind: Less is more! Preselect countries that make sense.

Google

PL and BR show both high potential and low entry barriers

Correlation between Category Interest, Category Interest Growth, Category Interest Per Capita
Bubble size: Category Interest Per Capita
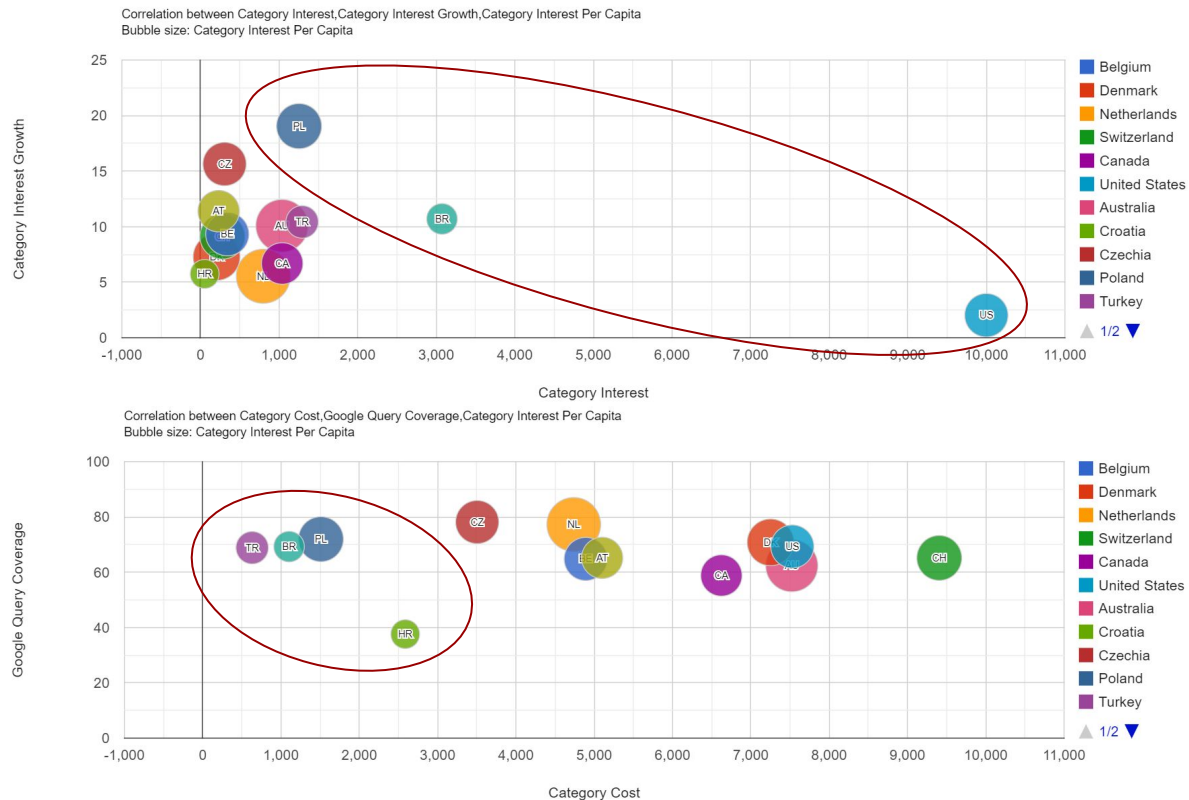
Highest Potential Markets
(by Growth and Volume):
- US (strongest on Volume)
- Brazil (good volume & growth)
- Poland (strongest growth)

Correlation between Category Cost, Google Query Coverage, Category Interest Per Capita
Bubble size: Category Interest Per Capita

Lowest barriers to entry
(by Cost and Competition):
- Turkey (lowest cost)
- Brazil
- Poland

Google Partners

Adapt the bubble chart according to your need
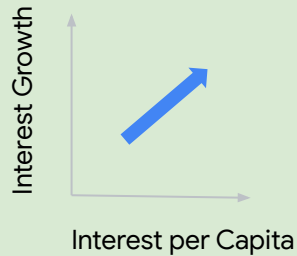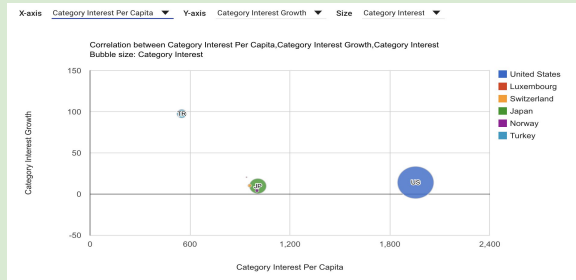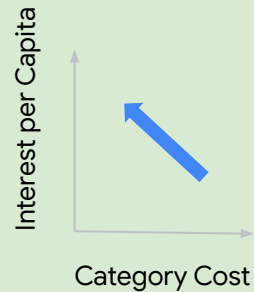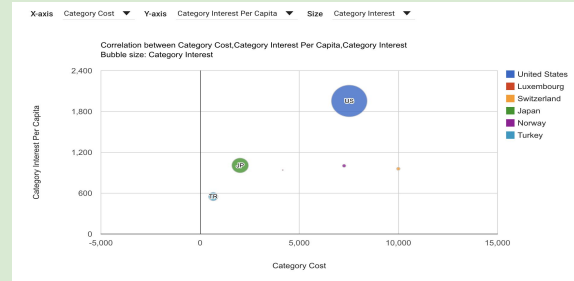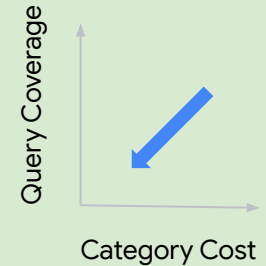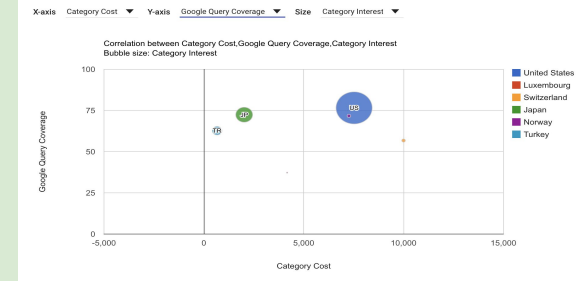
Poland, Brazil and Turkey represent a better expected return than DE

Recommended quarterly investment per Country
Expected traffic volume relativ to DE, assuming same CTR as DE

Legend: ▮ Traffic Volume ▮ Invest per Q
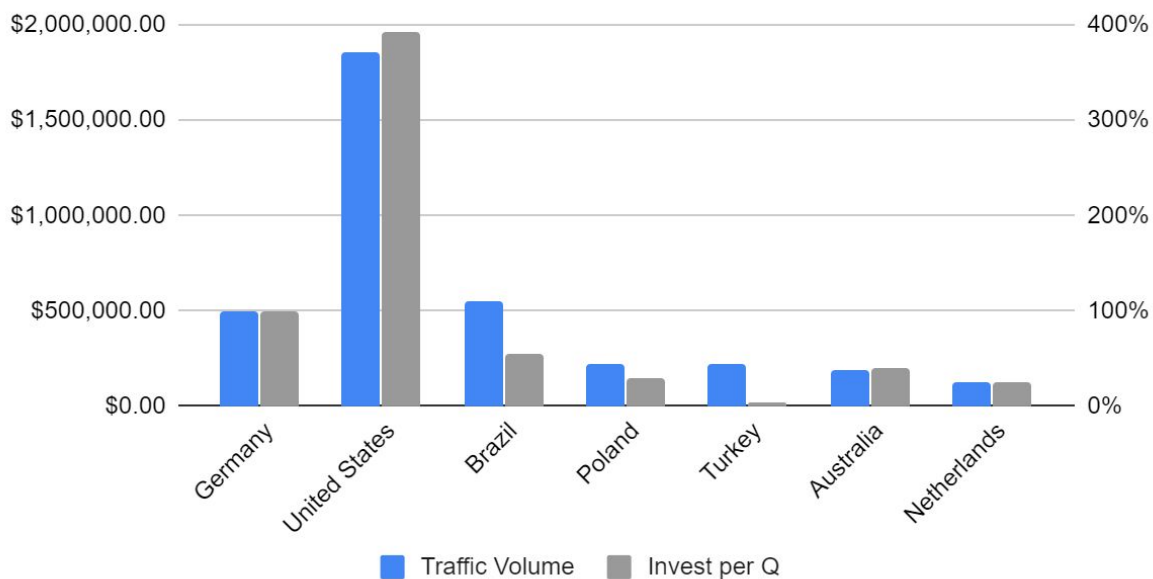
US has the biggest market size for Toys. Nevertheless, only **BR, PL & TR** offer a better traffic return on invest than DE.

Investment opportunity based on volume and cost vs DE benchmark ($xxk) per Quarter

US	**$xxk**
BR	**$xxk**
PL	**$xxk**
TR	**$xxk**

Source: Internal Google Data 2020

Google Partners

Goal
Identify the potential return in new countries in terms of invest vs expected traffic

Data & Sources
Market Size and Cost Data (MarketExplorer)
Current Invest and CTR in domestic Market

Approach
Index reference market (e.g. domestic) = 100%, then benchmark market sizes and category cost against domestic market. E.g.:

=D21*B22*C22

	A	B	C	D
		Demand Volume	Cost	Invest Q1
	Germany	100%	100%	$500,000.00
	United States	370.37%	105.75%	$1,958,280.12
	Brazil	111.11%	49.43%	$274,584.93
	Poland	44.44%	67.82%	$150,702.43
	Turkey	44.44%	8%	$17,777.78
	Australia	37.04%	105.75%	$195,828.01
	Netherlands	25.93%	100%	$129,629.63

Tools
MarketExplorer
Google Ads & Analytics Data

Poland, Brazil and Turkey represent a better expected return than DE

Recommended quarterly investment per Country
Expected traffic volume relativ to DE, assuming same CTR as DE

[Bar chart with values from $0.00 to $2,000,000.00 on left axis and 0% to 400% on right axis, for Germany, United States, Brazil, Poland, Turkey, Australia, Netherlands]

Legend: Traffic Volume, Invest per Q
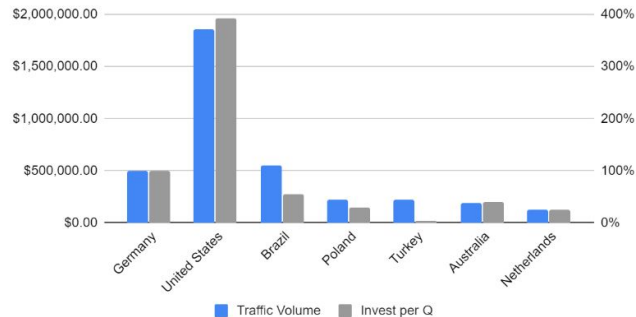
US has the biggest market size for Toys. Nevertheless, only **BR, PL & TR** offer a better traffic return on invest than DE.

Investment opportunity based on volume and cost vs DE benchmark ($500k) per Quarter

US	**$1,958k**
BR	**$275k**
PL	**$151k**
TR	**$18k**

Based on the analysis let's have a look at Poland and Brazil

Query share (%)

Polish	95.54
English	3.33
Russian	0.45
German	0.2
Ukrainian	0.15
Other	0.31

Query share (%)

Portuguese (Brazil)	91.28
English	6.74
Portuguese	1.63
Spanish (Spain)	0.09
Spanish (Latin America)	0.09
Other	0.12

Source: Internal Google Data last closed quarter

Google

Both countries show a clear preference for mobile

YoY Query Growth (%)

All devices	7.32
Computers	-12.76
Mobile	13.29
Tablet	-10.65

Country Online Audience ⑦

67%
Internet penetration

85%
Android usage

Source: The World Bank (2017); StatCounter Global Stats (Statcounter, 2018)

YoY Query Growth (%)

All devices	22.9
Computers	-0.22
Mobile	36.74
Tablet	-5.9
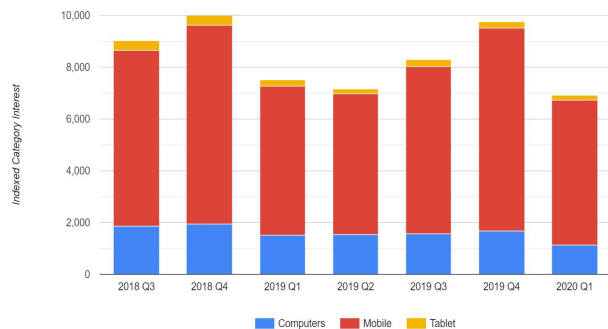
Country Online Audience ⑦

76%
Internet penetration

95%
Android usage

Source: The World Bank (2017); StatCounter Global Stats (Statcounter, 2018)

Google
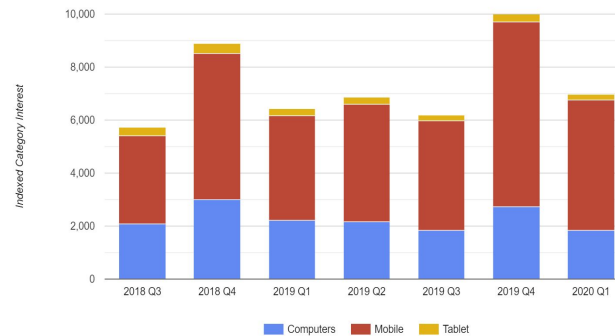
Brazil sees a steady increase in traffic from June onwards whereas CPCs keep at similar levels throughout the year
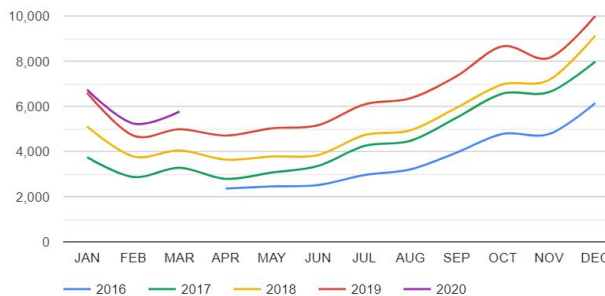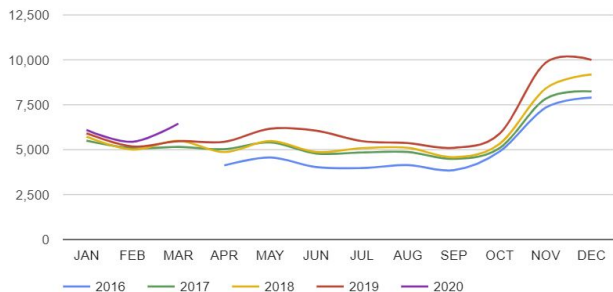
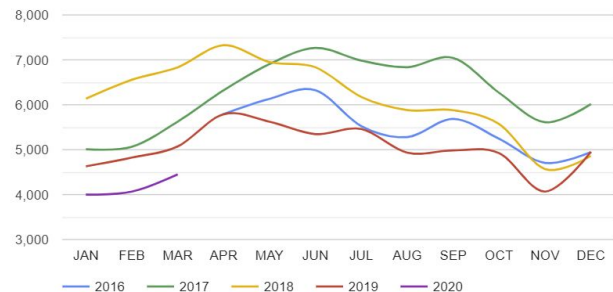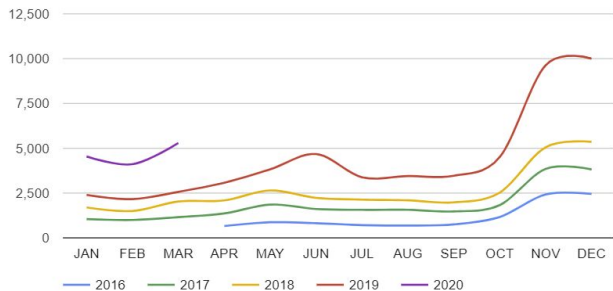# Poland regularly peaks in Q4 with CPCs developing counterwise
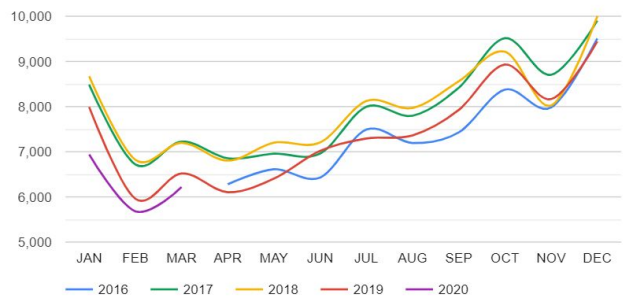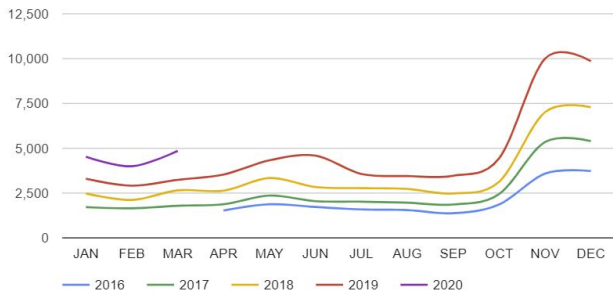
Category Interest
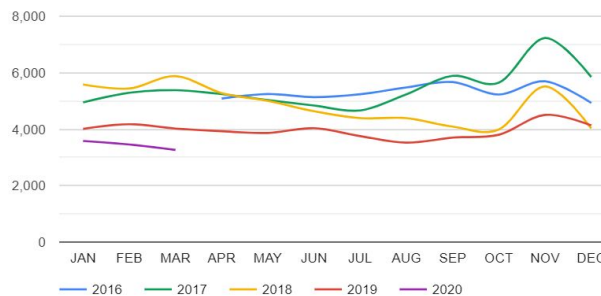
Category Cost

Category Impressions

Category Clicks

Google

Examples of additional information you can get on market and category from Market Finder

Poland

~ 6.5m

Monthly searches across categories

Very low

$0.00 $0.94

Google Ads recommended bid

40

out of 190 countries

Ease of doing business index (rank)

$21.3k

Household net disposable income

Online profile

Active internet population [1]

78%

Fixed broadband subscriptions [1]

68%

Android and iOS usage [2]

Frequency of personal internet use [3]

74%

Frequency of viewing online videos on a smartphone [3]

17%

Logistics

Trading across borders rank data [1]

1

out of 190 countries

Country profile

Population size [1]

38m

Languages spoken [2]

Polish, PL (97%)

English, EN (34%)

German, DE (19%)

+7

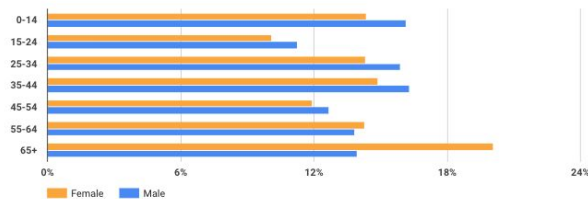Currency [3]

PLN

Corruption perception index [4]

60

Ranked #36

Median Age [5]

40.7

years

Population breakdown by age [6]

Age	
0-14	
15-24	
25-34	
35-44	
45-54	
55-64	
65+	

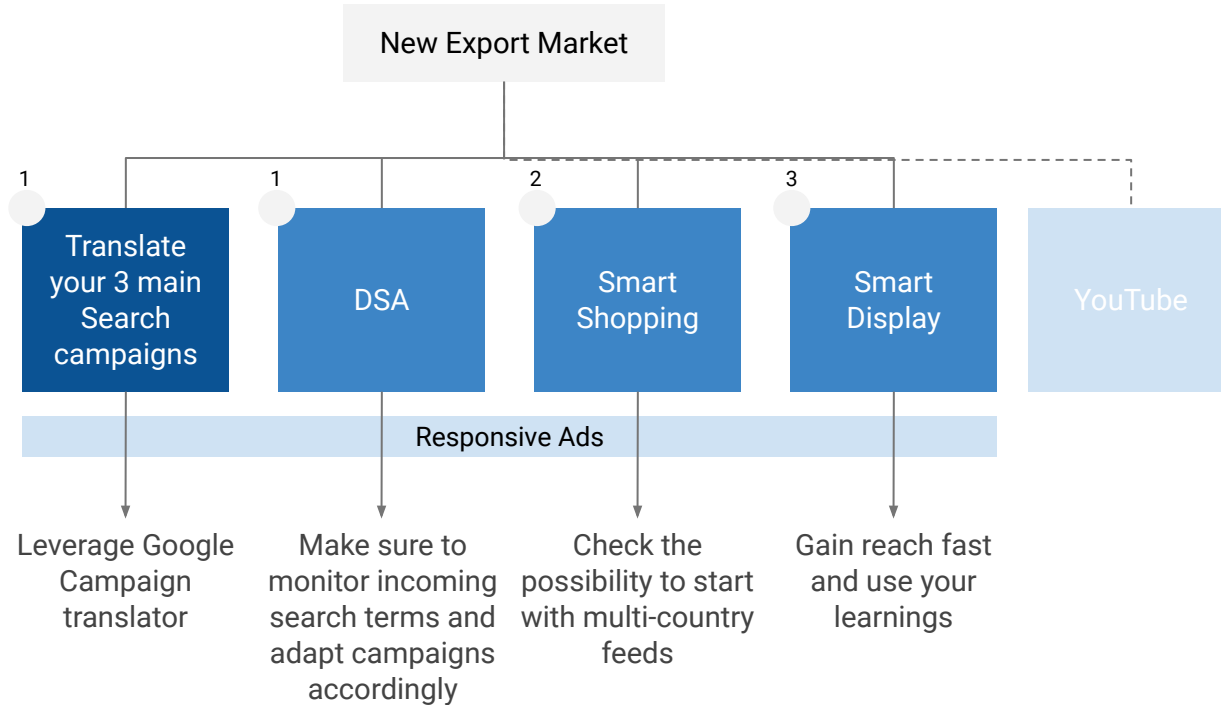0%   6%   12%   18%   24%

Female   Male

Data sources

1. World Economic Forum (2019), 2. Unicode.org (2017), 3. Countries of The World (2017), 4. Transparency.org (2018), 5. CIA World Factbook (2017), 6. UN data (2015)

Useful Resources

- **Market Explorer Tool** (Market Identification)

- **Market Finder Tool** (Go-to-market Resources)

- **Think with Google** (Insights & Data)

- **Grow my Store** (Checklist for Retail Websites)

- **Google Trends** (Searchterm trends, great for comparing brands)

- More third party resources can be found in the appendix

Google

Our suggested campaign set-up for new markets

New Export Market

1	1	2	3	
Translate your 3 main Search campaigns	DSA	Smart Shopping	Smart Display	YouTube

Responsive Ads

Leverage Google Campaign translator	Make sure to monitor incoming search terms and adapt campaigns accordingly	Check the possibility to start with multi-country feeds	Gain reach fast and use your learnings

Google Partners

Localize campaigns with Google's Campaign Translator

Same quality process that Google uses for their own translations: state-of-the-art technology plus quality review by 2 professional translators

Request in 2 easy steps; 4 business days average turnaround time

Supports search campaigns, display campaigns and App Campaigns (keywords, text ads, sitelink extensions, callout extensions)

More than 200 language pairs available and source campaign does not have to be in English

Placeholder for Global Business Solutions

How to
Insert suitable slides from the [Global Business Solutions](#)

Google

Opportunities in new markets

Country	Recommended Investment	Estimated Impressions	Estimated Clicks	Estimated Conversions
Brazil	$###	###	###	###
Poland	$###	###	###	###
Turkey	$###	###	###	###
US	$###	###	###	###
Netherlands	$###	###	###	###
Total	**$###**	**###**	**###**	**###**

Google Partners

Business Readiness Checklist

Topic / Country	UK	FR	DE	IT	US	BR	PL	TR
Website in local language	✔	✔	✔	✔	✔	✘	✘	✘
Campaigns in local language	✔	✔	✔	✔	✔	✘	✔	✘
Country-specific payment options	✔	✔	✔	✘	✘	✔	✔	✘
Offline Operations in place	ə	ə	ə	ə	ə	ə	ə	ə
In-market sales team	✔	✘	✔	✘	✔	✘	✘	✘
Score	4/5	3/5	4/5	2/5	3/5	1/5	2/5	/5

Planning Together: Key priorities and action items

Focus Area	Action	Owner	Timeline

Key Takeaway

Google

Thank you

Next Steps

Get ready to tell the story yourself!

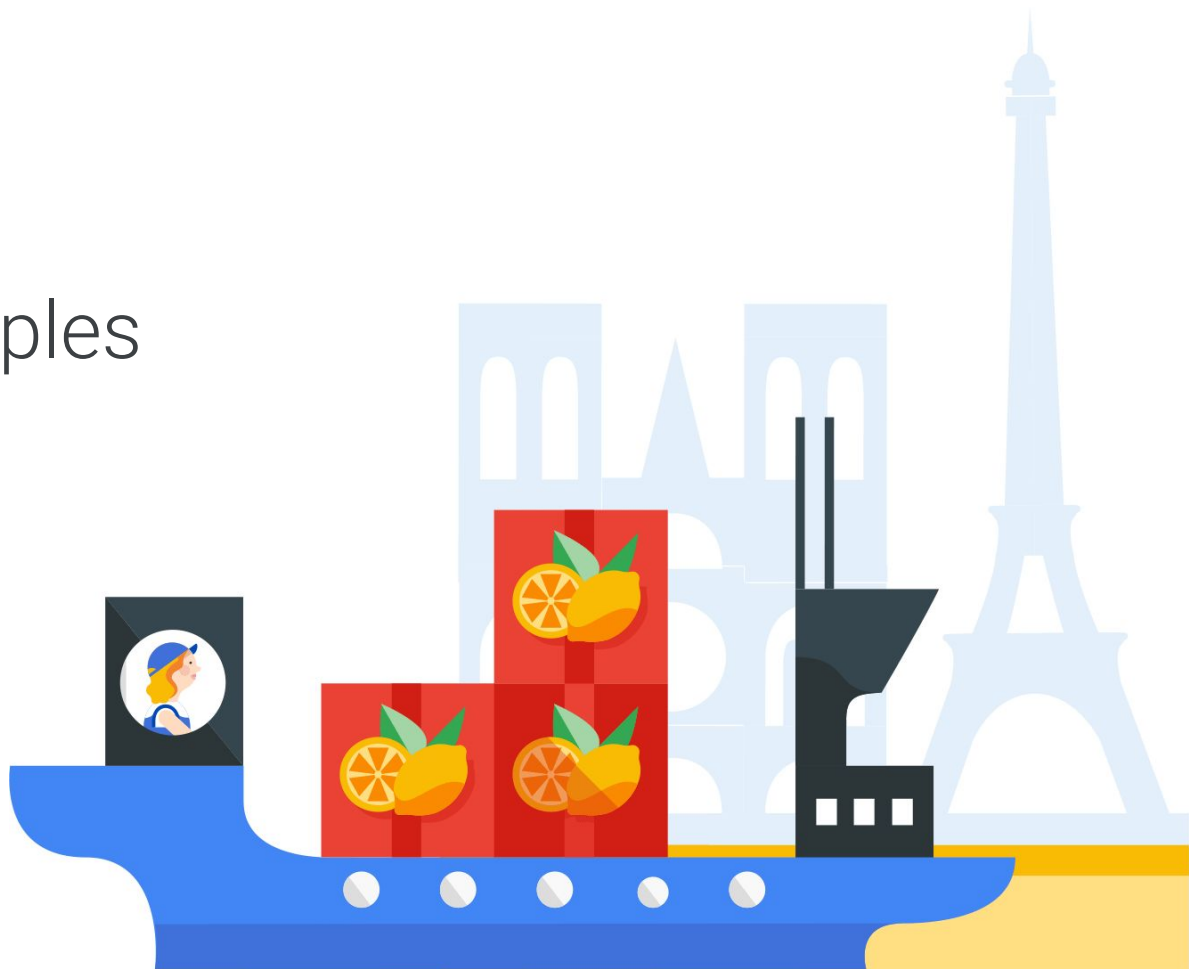**1** Receive the Playbook with detailed instructions on how to leverage our International Growth Tools

2 Choose one of your export clients to build the pitchdeck for

3 Schedule a 1:1 office hour with your IGS to receive feedback and ask any questions you might have
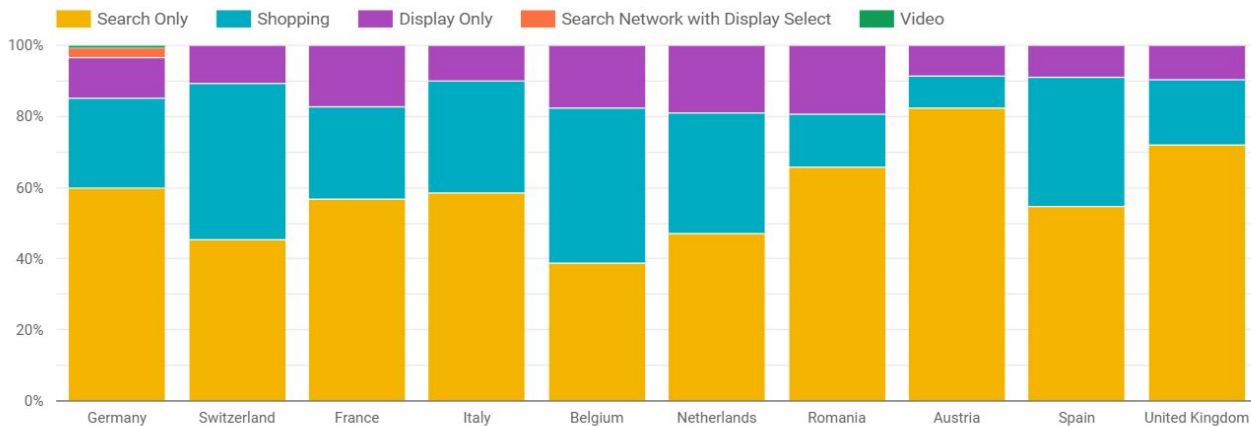
Google Partners

Additional Retail Resources Examples

Low Display & Video adoption in HiPo markets leaves room for more potential

Google Product Breakdown by Market (% of overall investment)

Legend: Search Only · Shopping · Display Only · Search Network with Display Select · Video

Markets: Germany, Switzerland, France, Italy, Belgium, Netherlands, Romania, Austria, Spain, United Kingdom

There is untapped Potential in CH, IT, AT, ES & UK for mid funnel activities.

Based on past KPI performance and potential Marketvolume we suggest xxx

Google

Goal
Find growth & performance opportunities in intl markets by comparing the Google product split to the domestic market.

"In the UK your spend for GDN is 20%, in DE 5%"

Data & Sources
Investment & product adoption by Country (Market Scorecard DataStudio Dashboard)

Approach
Spot differences in product adoption that could reflect a growth and performance opportunity.
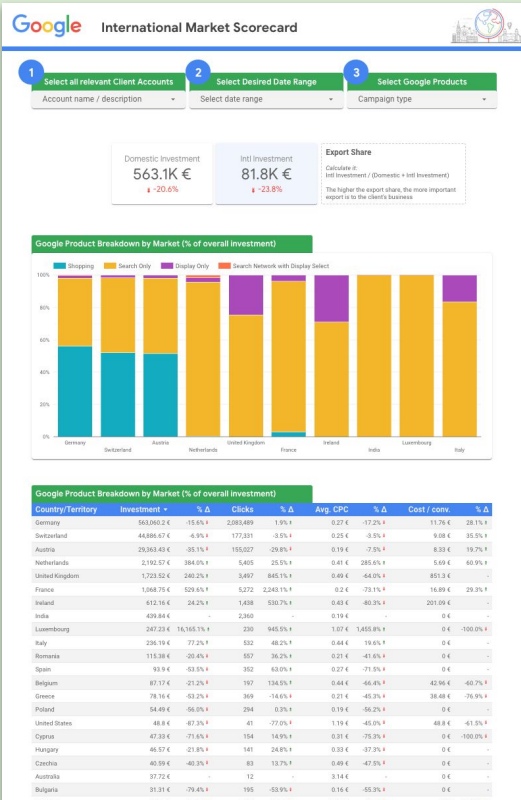
Recommendation
Check for Account performance flags if the products have previously been used and check if the setup was correct.

Tools
Market Scorecard DataStudio Dashboard
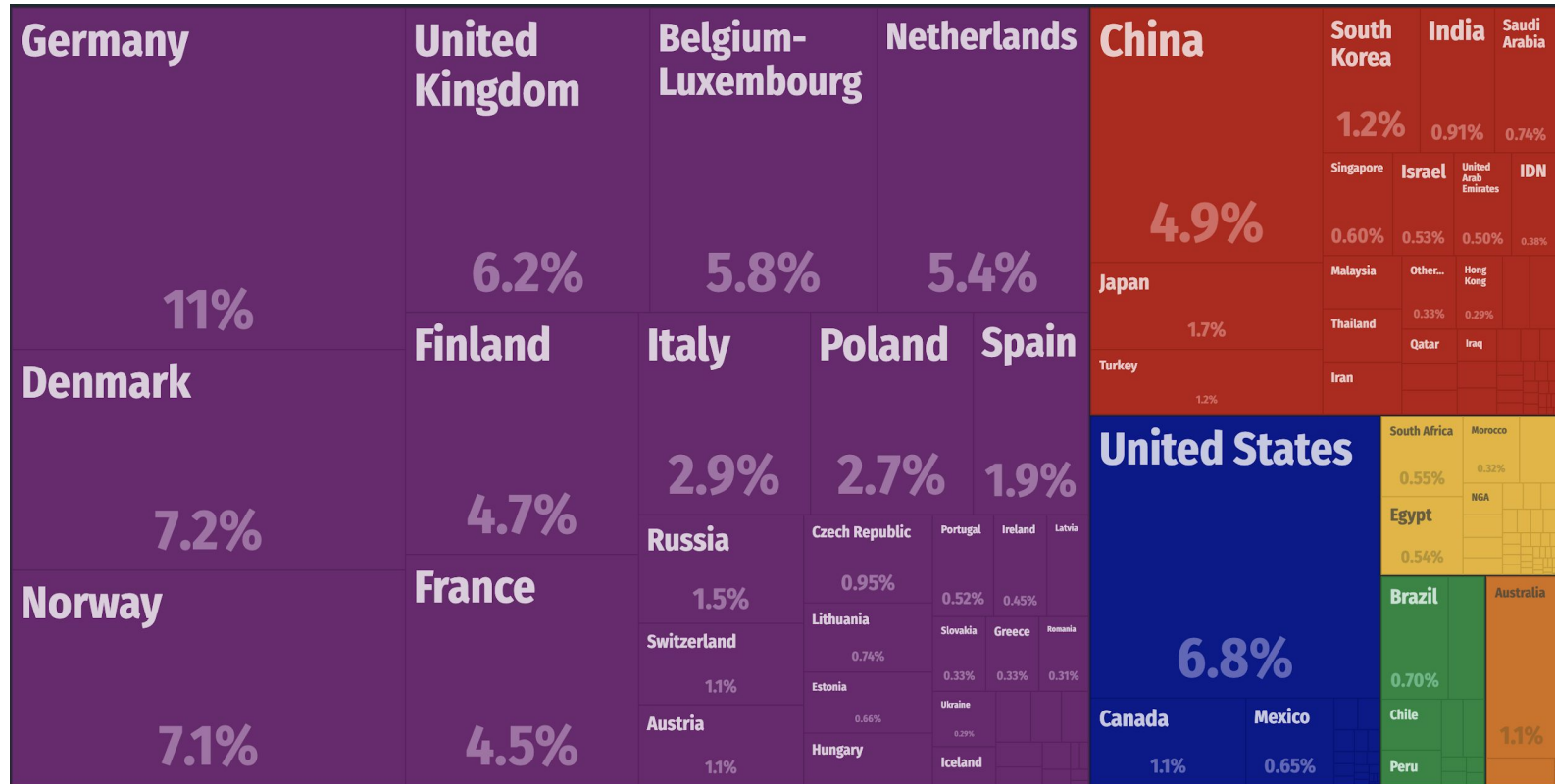Google Ads Recommendations Tab

Google

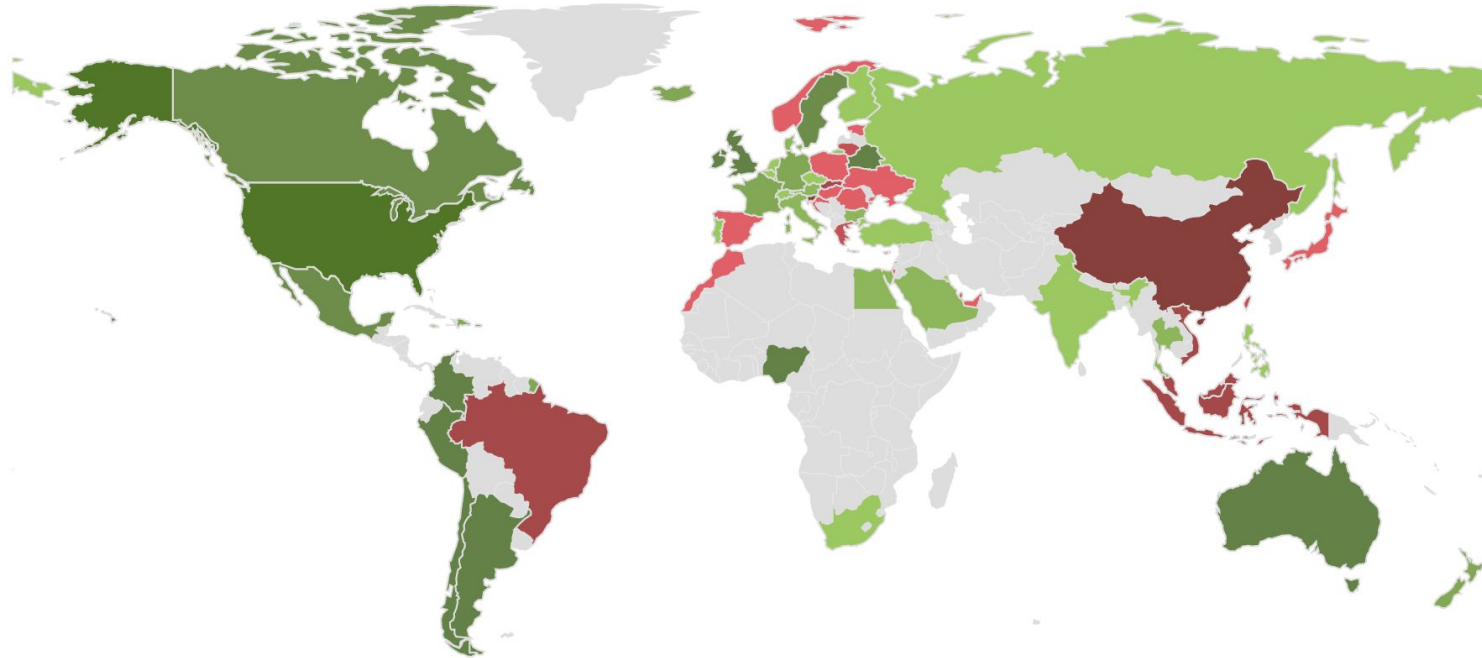# How to use the International Market Scorecard

1. Request the Dashboard from your IGS & make a copy

2. Select "Google Ads" as data source

3. Put in MCC ID (Limit: 50 accounts) if limit is reached, do several copies and connect lower level MCCs

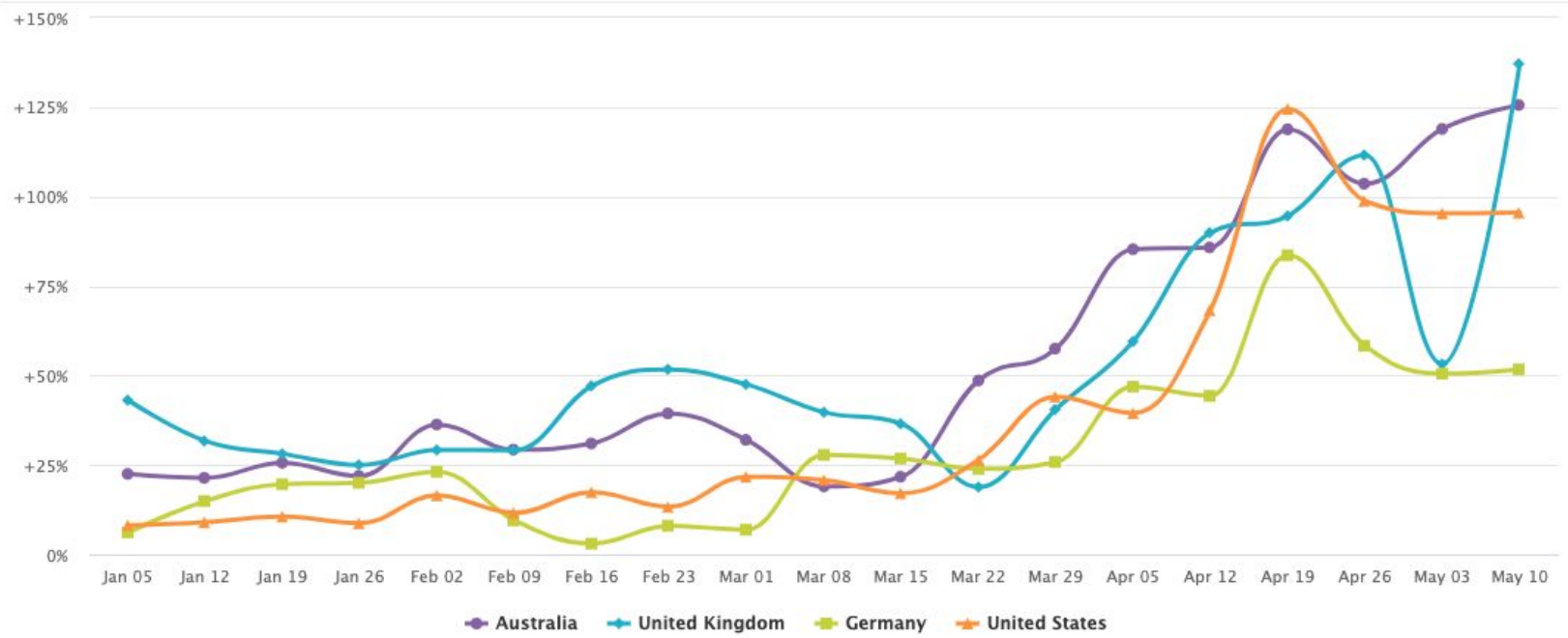4. All charts will automatically populate

Data and charts are downloadable

Google

Europe (70%) has historically been Sweden's main trading market, followed by Asia (16%) and then North America (9%)

| Germany 11% | United Kingdom 6.2% | Belgium-Luxembourg 5.8% | Netherlands 5.4% | China 4.9% | South Korea 1.2% | India 0.91% | Saudi Arabia 0.74% |

Germany 11%
Denmark 7.2%
Norway 7.1%

United Kingdom 6.2%
Finland 4.7%
France 4.5%

Belgium-Luxembourg 5.8%
Italy 2.9%
Russia 1.5%
Switzerland 1.1%
Austria 1.1%
Czech Republic 0.95%
Lithuania 0.74%
Estonia 0.66%
Hungary

Netherlands 5.4%
Poland 2.7%
Spain 1.9%
Portugal 0.52%
Ireland 0.45%
Latvia
Slovakia 0.33%
Greece 0.33%
Romania 0.31%
Ukraine 0.29%
Iceland

China 4.9%
Japan 1.7%
Turkey 1.2%
South Korea 1.2%
India 0.91%
Saudi Arabia 0.74%
Singapore 0.60%
Israel 0.53%
United Arab Emirates 0.50%
IDN 0.38%
Malaysia 0.33%
Other... **Hong Kong** 0.29%
Thailand
Qatar **Iraq**
Iran

United States 6.8%
Canada 1.1%
Mexico 0.65%

South Africa 0.55%
Morocco 0.32%
Egypt 0.54%
NGA

Brazil 0.70%
Chile
Peru

Australia 1.1%

The landscape is changing with dynamic fluctuations in consumer demand

| < -100% | < -75% | < -50% | < -25% | < 0% | > 0% | > +25% | > +50% | > +75% | > +100% |

7 days e-commerce YoY % Rev

Google Partners
ccinsight.org

Online retail revenue is increasing differently market to market

Retail YoY % Rev

Shopping Insights tool gives a powerful look into e-commerce landscape in the US

Category | Beds & Accessories
Mattresses

Category | Furniture
Beds & Accessories

+ ADD COMPARISON

Sign in to subscribe   Download all data

From
Apr 25, 2020

Until
May 25, 2020

1 Month   1 Year

Shopping season ⌄

United States ⌖

☐ Mobile ☐ Desktop ☐ Both

Clear all filters

Searches over time ⦵

⋮

100

75

50

25

0

Wed, Apr 29, 2020   Mon, May 4   Sat, May 9   Thu, May 14   Tue, May 19   Sun, May 24

Google Partners
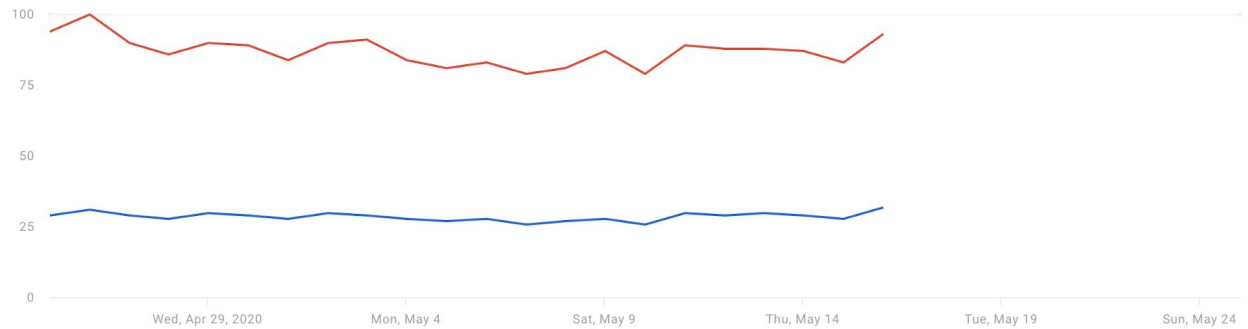
GBS Slides to include
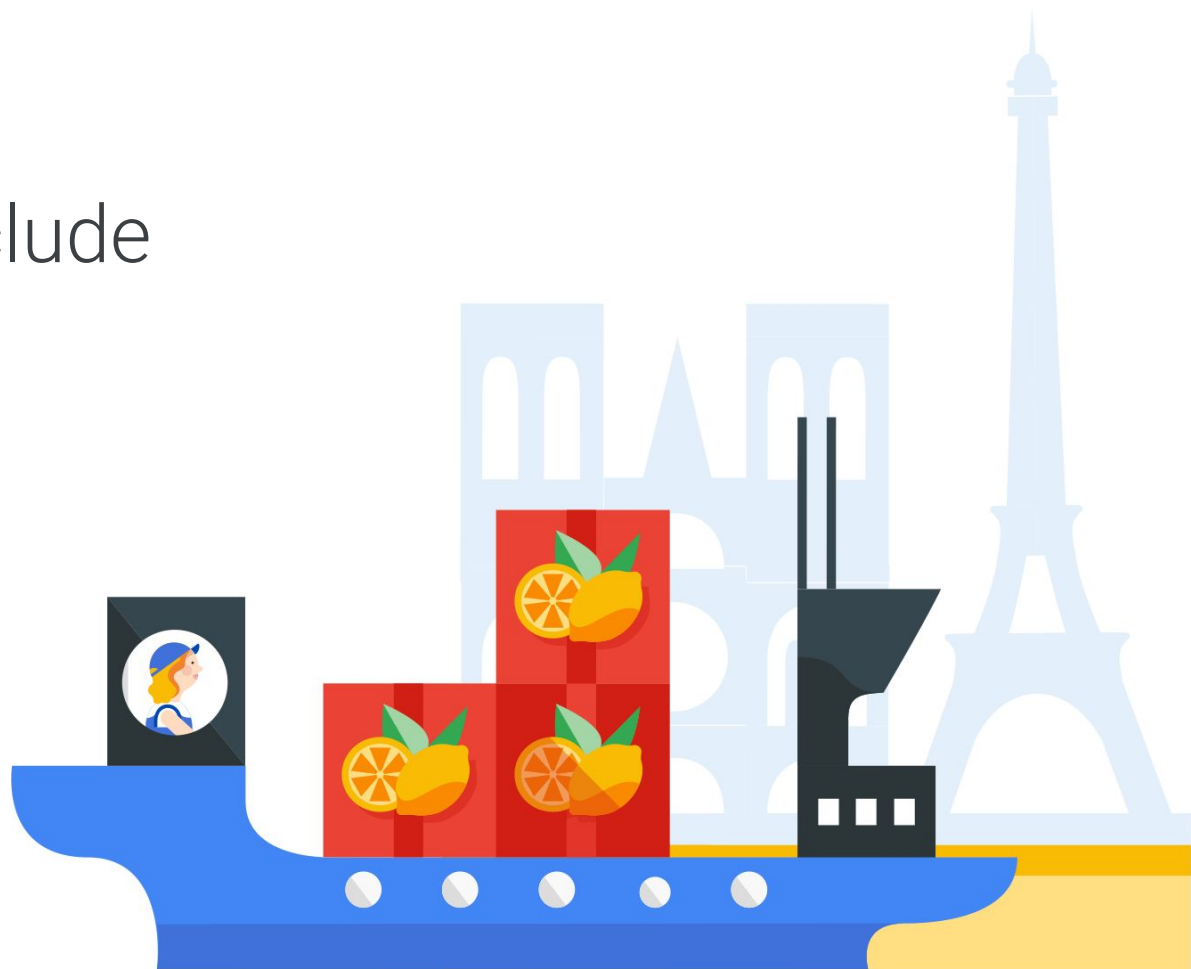
The next section of the deck features 2 slides per program, focusing on:

- **Why that topic matters**
- **Overview of program**

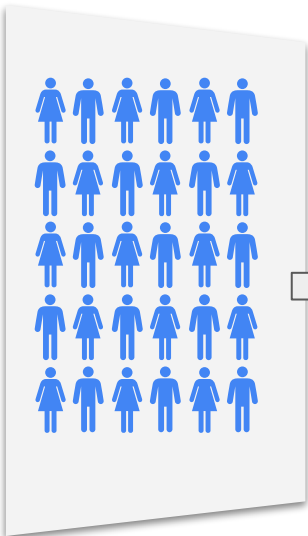**Feel free to 'Plug & Play' these slides as needed**

Google
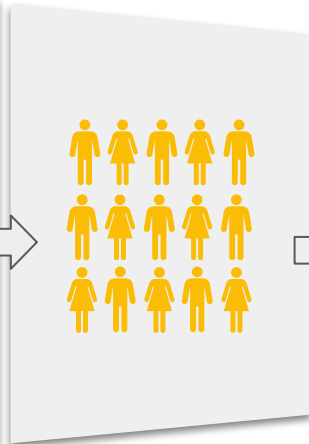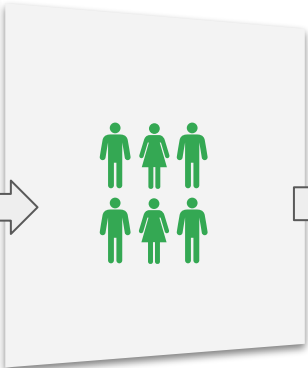
GBS Go

Google

GBS GO Consult - The Customer Journey

Stage 1.

Stage 2.

Stage 3.

Stage 4.

Starts Search

Makes Purchase

1. Homepage Experience
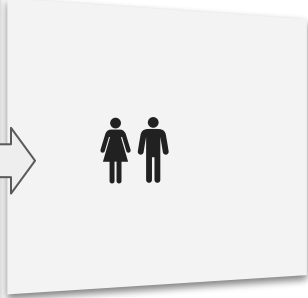
- **Landing Page** effectiveness & placements

2. Product Page

- Engagement & Drivers
- **Support effectiveness**: FAQs, Channels of Support, Tech

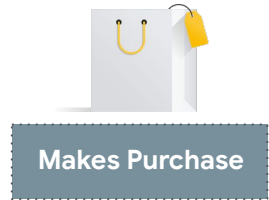## 3. Add to Cart

- **Logistics:** Delivery Options, Timelines, Fulfillment & Returns

4. Conversion Funnel

- Localised **payment methods**
- Seamless **Checkout** Experience

What to expect : ✓ Market Insights ✓ Competitor Examples ✓ Best in class industry examples ✓ Action Plan ✓ Partner Referrals

Google Partners

Localization

Google

Why a localization strategy matters?

Our advertising clients indicated that localization is the #1 operational hurdle in their internationalization efforts.[1]

72%
of consumers spend most of their time on **websites in their own language.**[2]

82%
of shoppers are **more likely to buy** if promotional material is in their own language.[3]

44%
of exporters say that **localizing** their website content is a **prohibitive factor for growth.**[4]

1. Google internal survey with advertisers
2. Harvard Business Review: Speak to Global Customer in Their Own Language
3. Can't Read Won't Buy, Localization Survey
4. Can't Read Won't Buy, Localization Survey

Google

Google's Localization Solutions Overview

Strategize

1:1 consultations
Operational advisory with Google expert

- Localization process and Quality assurance
- Content tiering
- Partner intros

Available to select customers

Scale

Localization Partner Referral
Preferential introductions to Google's Localization Partners

- Website, app translation & testing
- Ads & creatives localization
- Top quality
- Pre-negotiated rates and TATs

Available to select customers

Advertise

Campaign Translator
Free translations of Google Ad campaigns

- High quality translations for new products or markets
- Use case: Existing high volume content
- Google funded

Available to all customers, direct and agency*

*This service has request size and other limitations

Google

Customer Experience

Google

Why CX Matters: Significant loyalty and brand implications from delivering poor customer experience

60%

of global consumers have stopped doing business with a brand due to a single poor customer service experience.[1]

As a global merchant, **every interaction** is critical to influencing choice of brand and loyalty

55%

of consumers will abandon a transaction if answers aren't quick [2]

Failing to support consumers at the right moment can result in missed **conversions**

64%

of customer expect to receive real-time assistance.[3]

Companies need to be able to **keep up with consumer demand** across different channels to be there in those moments that matter

(1) Microsoft, State of Global Customer Service Report
(2) Forrester.com, Contact Centers Must Go Digital Or Die
(3) Zendesk, The Omnichannel Customer Service Gap

Google
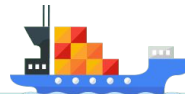
loyalty & ultimately increase customer lifetime value in new & existing markets

1

Segment

Understanding CX best practices to support the sales funnel

- Insights on **consumer support preferences & expectations** (pre, during & post sales)
- Analysis of current **self-serve & contact form strategy**
- Benchmarking against **global competitors**

2

Optimize

Sharing operational mgmt. techniques to optimize current operations

- Evaluation of **current operational readiness**
- **Customer retention** best practices
- Outsourcing **partner intros**

3

Scale

Leverage technology to grow operations internationally

- Optimize for demand with **chatbot technology** (Google Cloud Dialogflow referral)
- **Serve customers in any language with Unbabel's multilingual support** technology (partner intro)

Google

Logistics

Google

We know that getting International Logistics right is crucial to a retailer's success in international markets..

56%

of those abandoning an online shopping cart did so because the delivery options on offer were **too expensive**, 39% because the options were
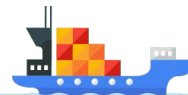**too slow**

61%

bought goods from one retailer over another because they provided **more delivery choices**

38%

would never shop with an online merchant again following a negative delivery experience

....but it's not always easy in unfamiliar markets

Source: Metapack - State of eCommerce Delivery 2017

Google

Global Business Solutions International Logistics aims to help retailers set up Logistics to new markets, and optimise in existing markets

1

Understanding Local Logistics Best Practices driven by local Consumer Expectations

- Insights on **local consumer delivery expectations**
- Benchmarking against **international and local Logistics best practices**

2

Finding a Distribution **Strategy** that allows you to meet consumer expectations in a way that works for you

- Overview of **local logistics landscape and providers**
- Evaluation of **current distribution strategy**
- Customised **strategic recommendations**

3

Selecting the right **Provider** to allow you to deliver a great customer experience in selected market

- Information on **provider reach and capabilities**
- Introduction to **handpicked global Logistics Providers**

Google

Payments

Google

Why Payments Matters: Significant conversion and thus *(missed)* revenue implications for clients by not optimizing

67%

of online shoppers abandon carts because a site does not support local payment methods[1]

As a global merchant, you need to make sure you know your audience and adapt to their local preferences in order to win them as your clients.

$118B

revenue missed by merchants in the US, due to unnecessary declines [2]

11%[3] of online shoppers report abandoning a purchase if the payment is declined. Save costly operational expenses and ensure payments are processed successfully the first time.

600+

Payment Providers exist globally, which one is the best for your business?

On average, an international merchant uses two[4] Payment Providers to cover all markets and payment methods. Each Provider has it's unique value proposition which you should evaluate before integrating.

(1) Paymotion -TheGlobalCheckout
(2) Javelin Research, USA, 2015
(3) WorldPay research 2013
(4) Google Internal info - Payment Program

Google

Payments: How Google can help

1 Understanding Payments to drive international growth
Detailed overview on popular local payment methods and market insights

3 Finding the right Partner to go global
Preferred introduction to selected Payment Providers and designated appointee

2 Sharing operational techniques to optimize costs
Best practices on handling chargebacks, refunds and decline rates

4 Optimizing payments on mobile
Mobile consumer behaviour, mobile checkout audit and optimization

Google