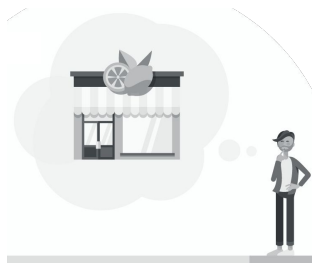International Growth program

Grow Existing Markets

Three Webinars over the coming weeks will get you up to speed
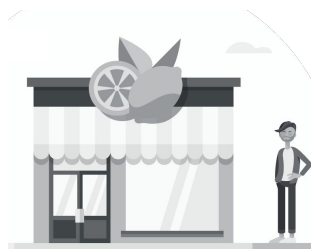
1 **Plan**

Prioritize where opportunities lie

2 **Build**

Prepare operations

3 **Scale**

Launch, measure and build your brand

Webinar title

"Identify and enter new Markets"

"Global Business Solutions"

"Grow existing Markets"

There is a range of approaches suitable for many clients

Short-/ Mid Term Opportunities

Parity Pitches

Add Languages

Market Parity	Product Parity
Investment vs. Market Size	GDN vs. Search vs. YT
PLA vs. Text Ads	

EN in non-EN markets

Rest-of-World

Agenda

1   Market Parity

2   Product Parity

3   Language Opportunities

Market Parity

Compare market sizes to quantify investment opportunities

Investment vs Market sizes

Goal
Identify growth opportunities in international 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
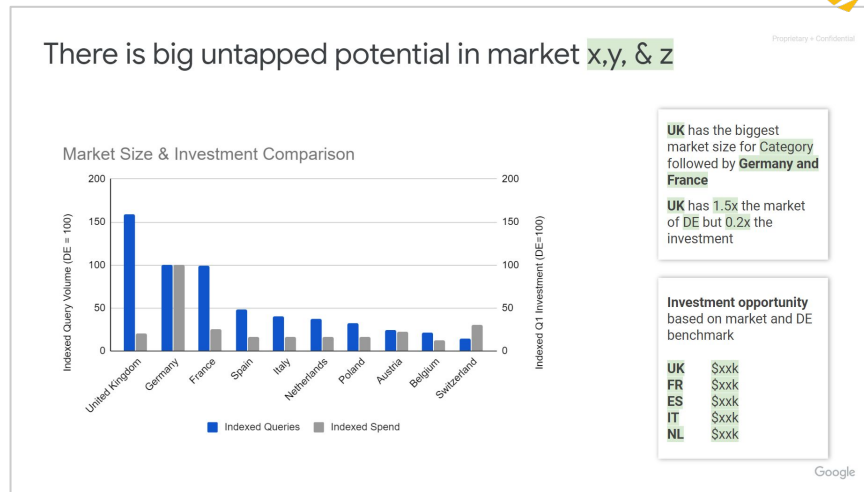(Market Scorecard Dashb. or Ads Geo Report)
Market Size Data (Market Explorer)

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 opp't.

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

There is big untapped potential in market x,y, & z

Proprietary + Confidential

Market Size & Investment Comparison

Indexed Query Volume (DE = 100)

Indexed Q1 Investment (DE=100)

United Kingdom, Germany, France, Spain, Italy, Netherlands, Poland, Austria, Belgium, Switzerland

■ Indexed Queries   ■ Indexed Spend

UK has the biggest market size for Category followed by **Germany and France**

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

Investment opportunity based on market and DE benchmark

UK	$xxk
FR	$xxk
ES	$xxk
IT	$xxk
NL	$xxk

Google

Tools

Market Explorer
Market Scorecard Data Studio Report

Google Partners

Your account structure should mirror a market's product preferences

Pla vs Text Ads

Goal
Avoid reaching a glass ceiling in growth, show growth oppt's 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
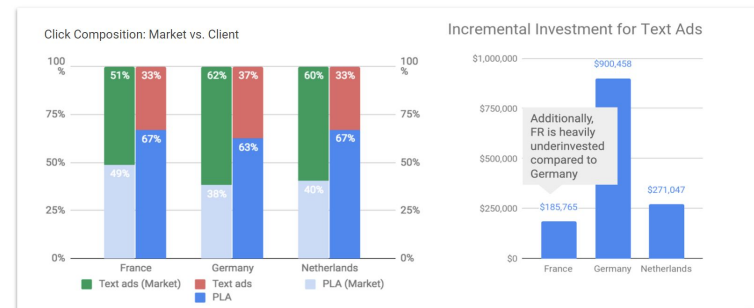Show client's PLA/Text click distribution in each country compared to the market

Recommendation
Text Ad share too low: KW expansion (higher bids, Campaign Translator, more ads/formats (RSA etc.)
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Client is highly underinvested in *Text Ads/Shopping*
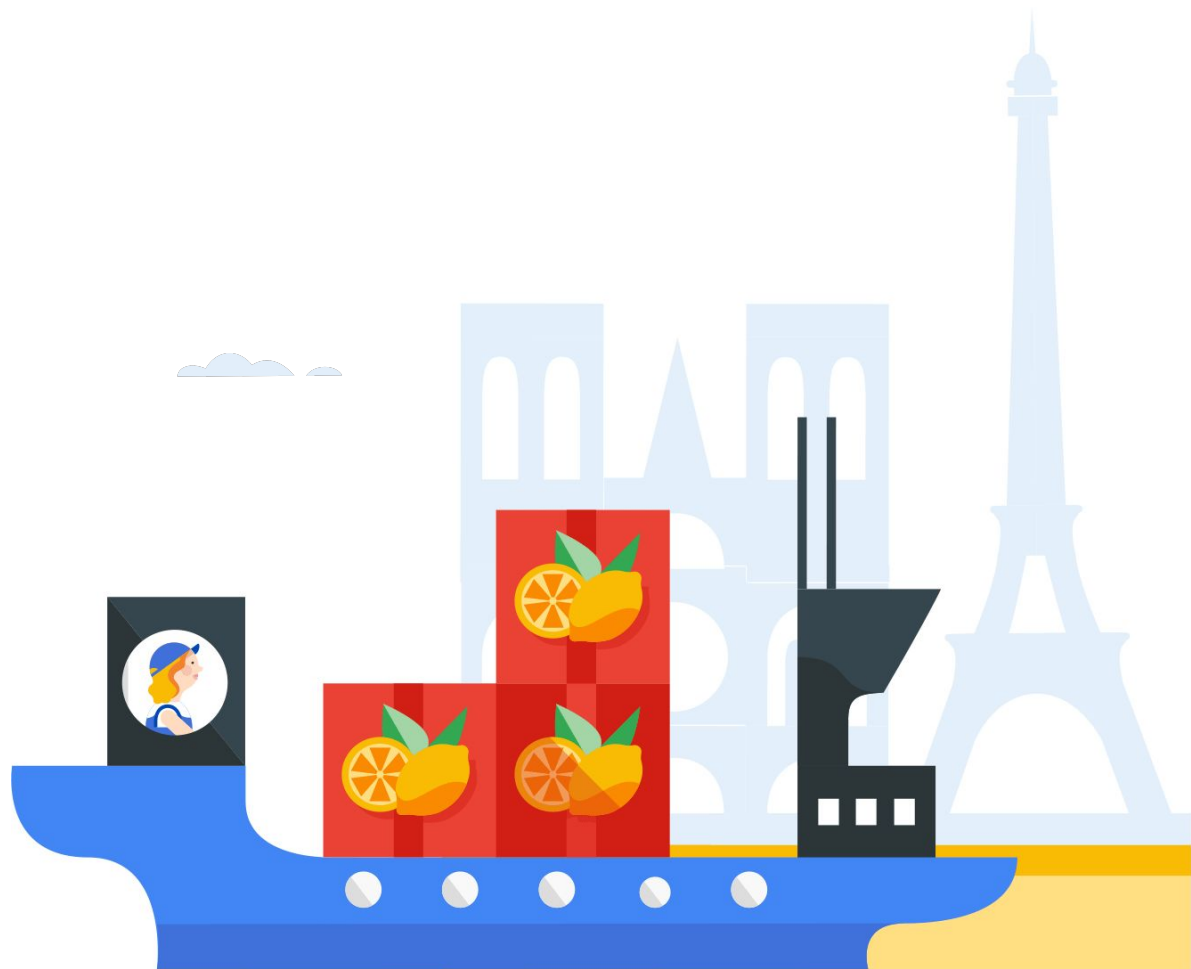
Proprietary + Confidential

Click Composition: Market vs. Client

Incremental Investment for Text Ads

Additionally, FR is heavily underinvested compared to Germany

$900,458
$750,000
$500,000
$250,000 $185,765
$271,047

France   Germany   Netherlands

France: Text ads (Market) 51% / Text ads 33% / PLA 67% / PLA (Market) 49%
Germany: Text ads (Market) 62% / Text ads 37% / PLA 63% / PLA (Market) 38%
Netherlands: Text ads (Market) 60% / Text ads 33% / PLA 67% / PLA (Market) 40%

■ Text ads (Market) ■ Text ads ■ PLA ■ PLA (Market)

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

Google

| Tools | Keyword Expansion
Campaign Translator (ask your AM) |

Google Partners

Product Parity

The Google Product Split across markets highlights product opportunities

Product Parity

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
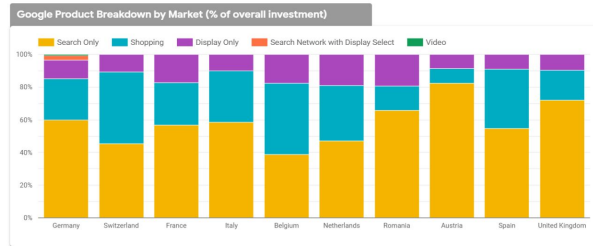Investment & product adoption by country (Market Scorecard Data Studio Dashboard).

Approach
Spot differences in product adoption that could reflect a growth and performance opportunity.

Recommendation
Check for performance flags if the products have previously been used and check if the setup was correct.

Low *(Video/GDN/...)* Adoption leads to missed potential

Google Product Breakdown by Market (% of overall investment)

Search Only | Shopping | Display Only | Search Network with Display Select | Video

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

There is untapped **Shopping/Display/...** Potential in most Markets

Tools	Market Scorecard Data Studio Dashboard
	Google Ads Recommendations Tab

Make use of the International Market Scorecard for opportunity spotting
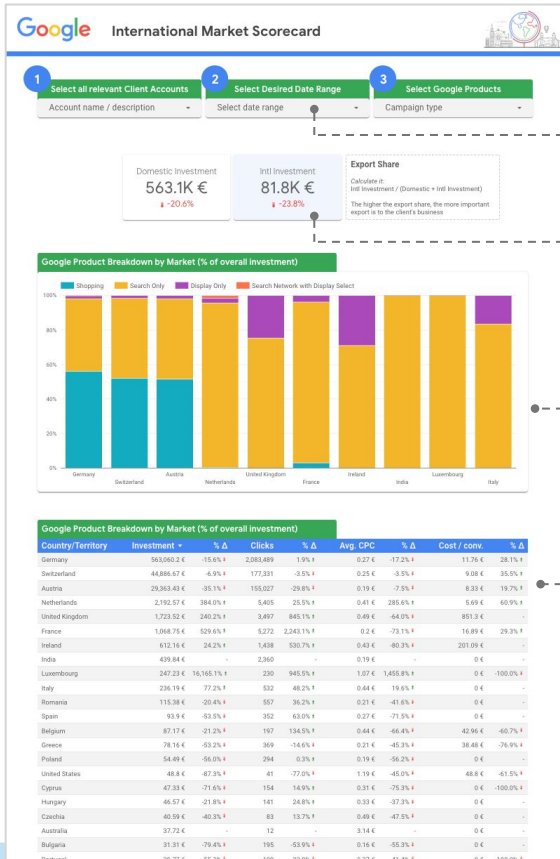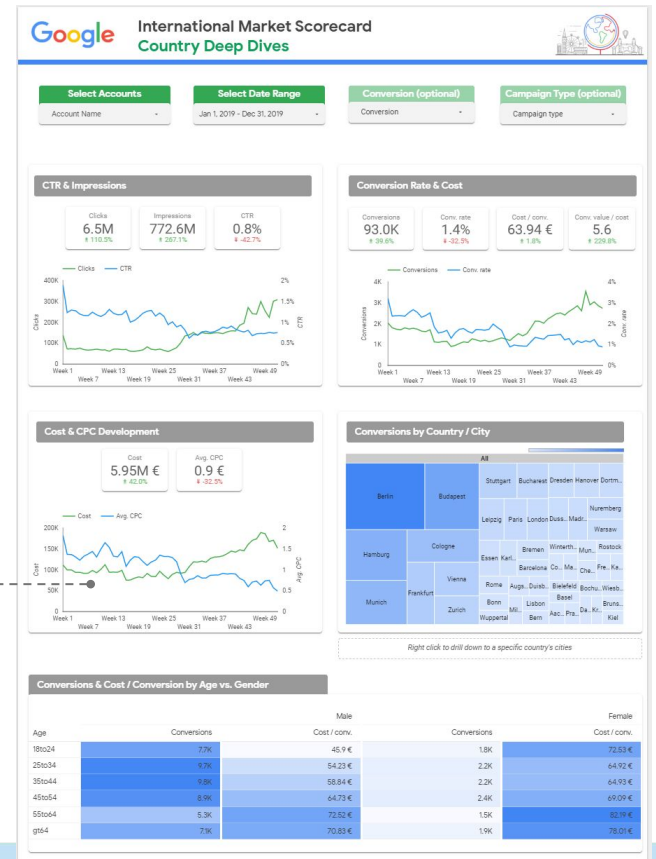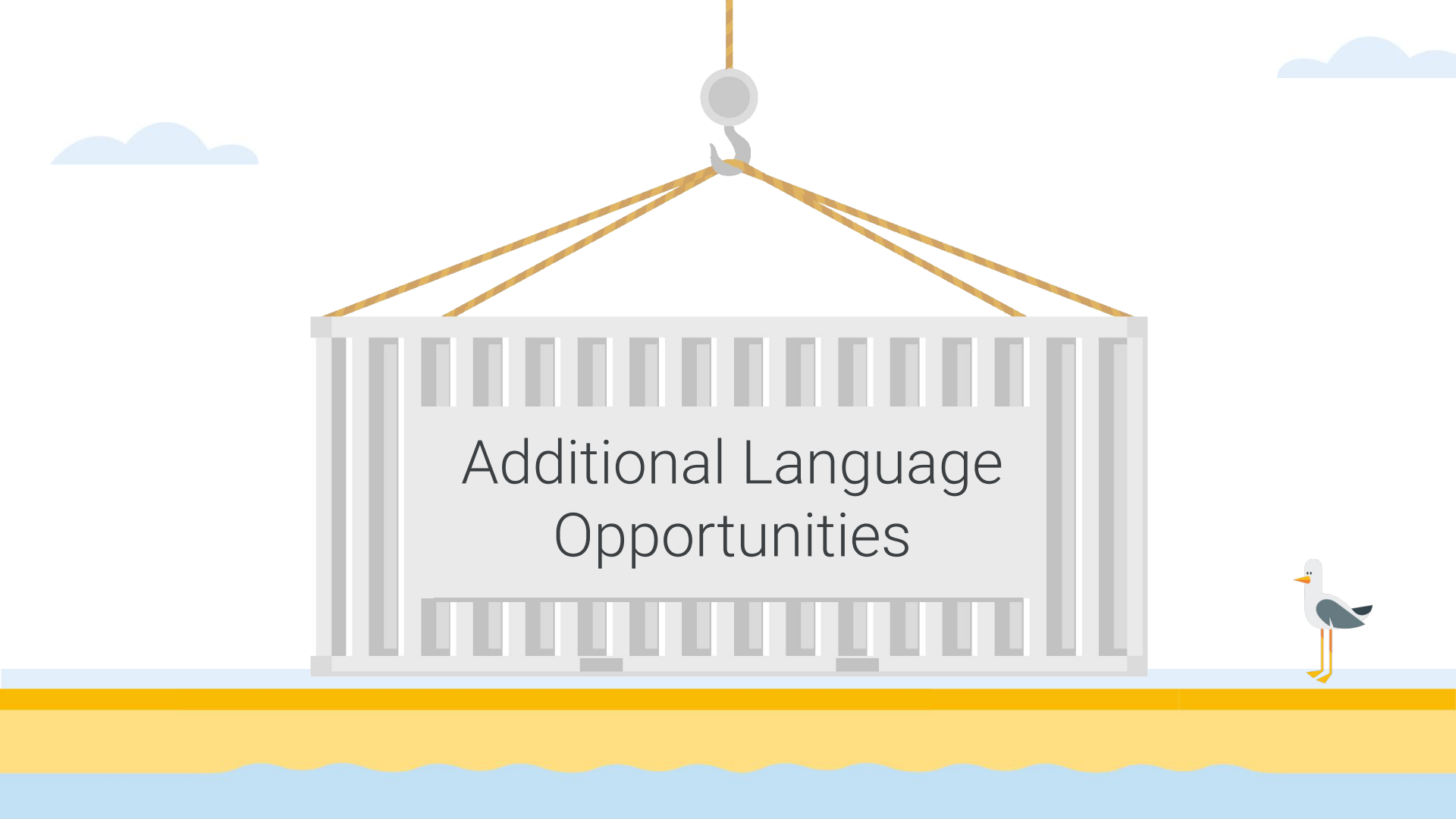

Filter for your desired client and timeframe

Check how international invest has developed vs domestic

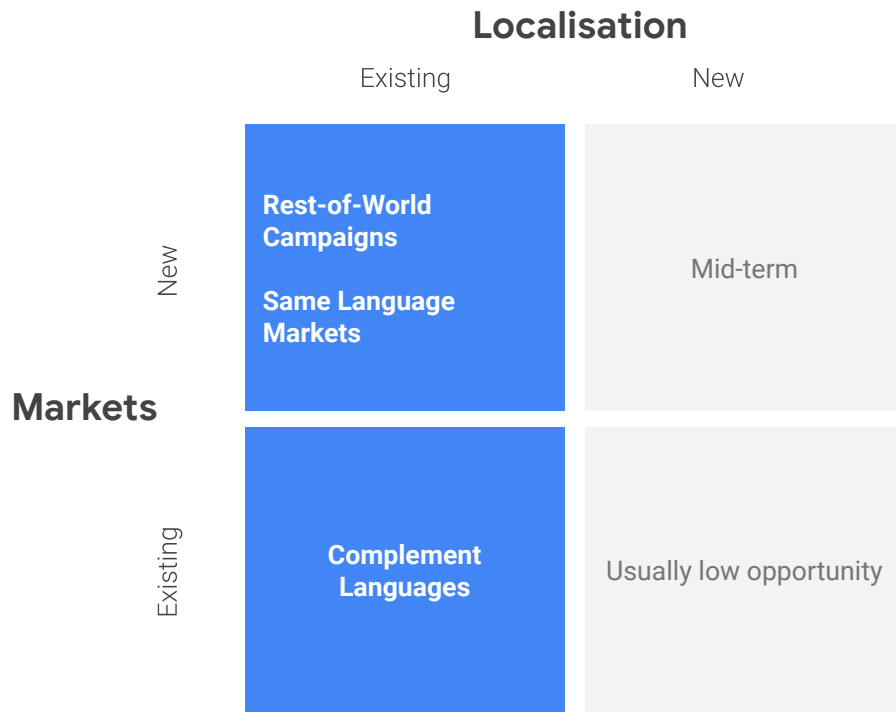Find growth & performance opportunities by comparing the Google product split

Dive into KPI details to spot international low hanging fruits (check out page 2)

Additional Language Opportunities

Additional Language can be an easy opportunity to expand

Localisation

Existing | New

Markets

New

Rest-of-World Campaigns

Same Language Markets

Mid-term

Existing

Complement Languages

Usually low opportunity

Google Partners

Additional Languages might bring significant volume increase

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 (Market Explorer)

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Select client's categories & the desired language in Market Explorer (e.g. EN) to see demand in non-EN speaking countries for EN queries. Check against traffic in Google Analytics to verify/build argument.
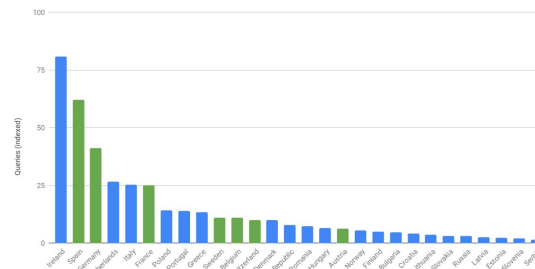
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Divide into incremental reach for existing countries and reach for RoW campaigns in new countries.

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Tools	Market Explorer Google Analytics

All approaches can be combined to form a cohesive pitch

Conversation Starter & Hook ------> **Investment vs. Market Size** ------> Investment Gap in Market X recognised

Where is potential to grow? ------> PLA vs. Text Ads | GDN vs. Search vs. YT ------> Potential to grow in Text Ads and to increase GDN Spend

How can we seize the potential? ------> Language Oppt's

Product Recommendations ------> Use YT4A with targeting XYZ

Put into operational Google Ads recommendations ------> Product Recommendations

International Growth Strategy

Google Partners

Thank you

Google Partners

International Growth program
Grow Existing Markets

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2 Build

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Webinartitle

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Additional Language Opportunities

Agenda

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Google Partners

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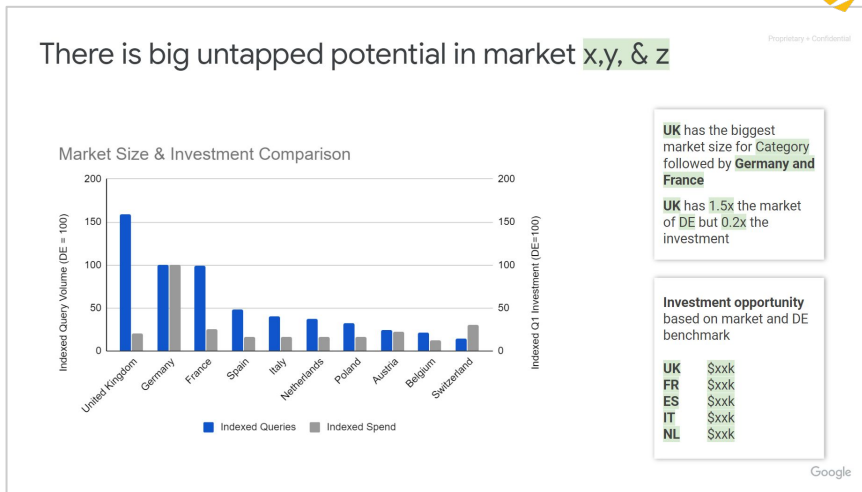(Market Scorecard Dashb. or Ads Geo Report)
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Google

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	Market Scorecard DataStudio Report

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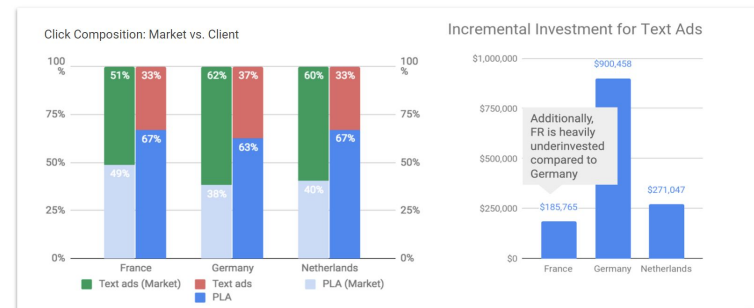Show client's PLA/Text click distribution in each country compared to the market

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Proprietary + Confidential

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	France	Germany	Netherlands
Text ads (Market)	51%	62%	60%
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PLA (Market)	49%	38%	40%

Legend: Text ads (Market), Text ads, PLA (Market), PLA

Incremental Investment for Text Ads

$1,000,000
$750,000
$500,000
$250,000
$0

Additionally, FR is heavily underinvested compared to Germany

France $185,765
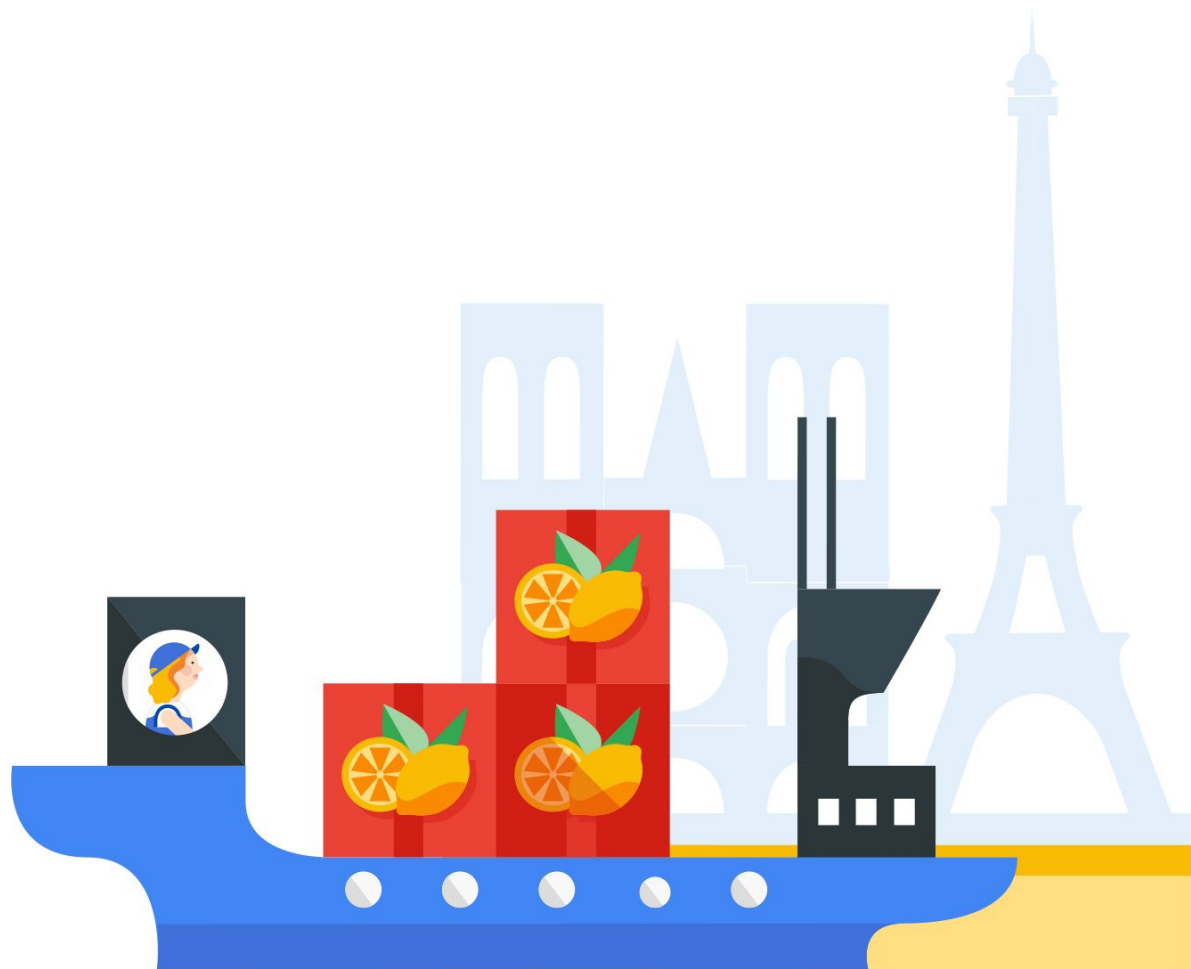Germany $900,458
Netherlands $271,047

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Google

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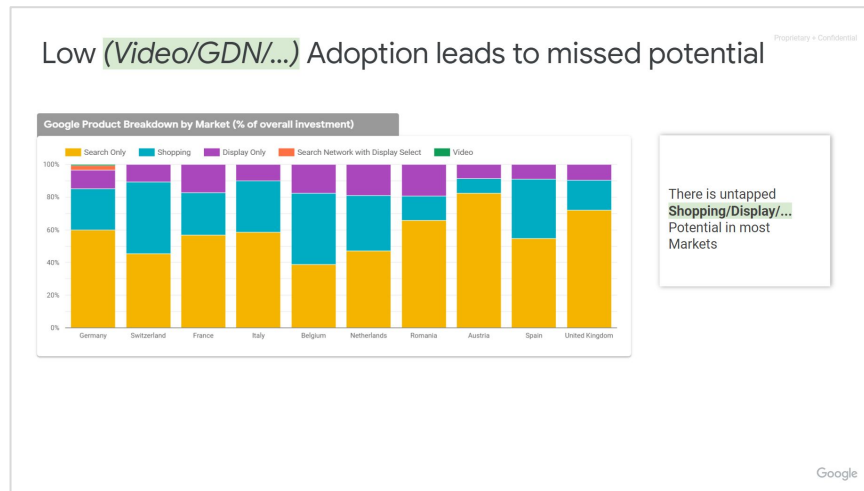
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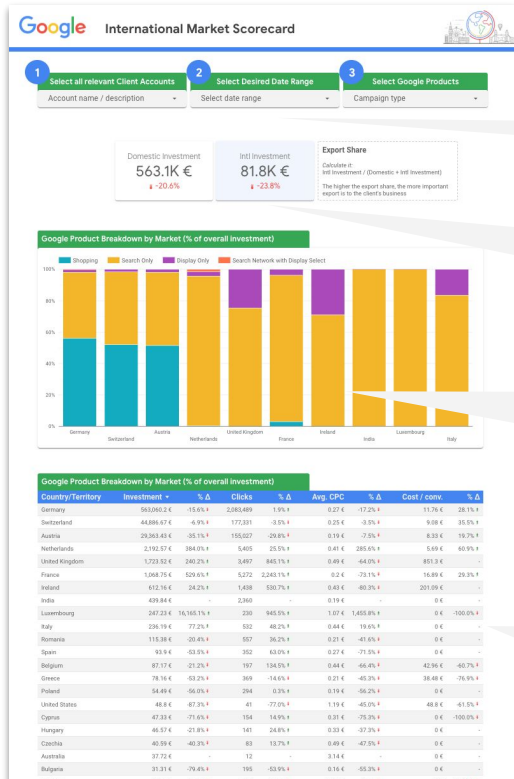
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Google

Tools	Market Scorecard DataStudio Dashboard Google Ads Recommendations Tab

Google Partners

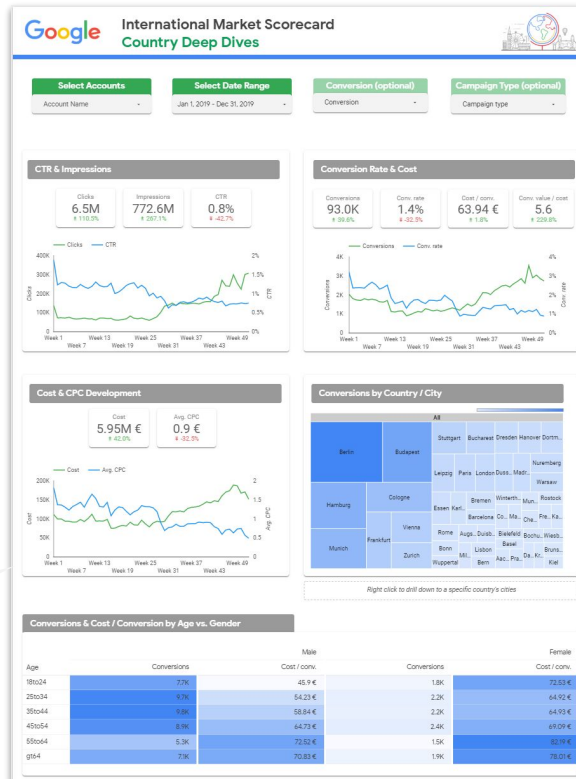# Make use of the International Market Scorecard for opportunity spotting

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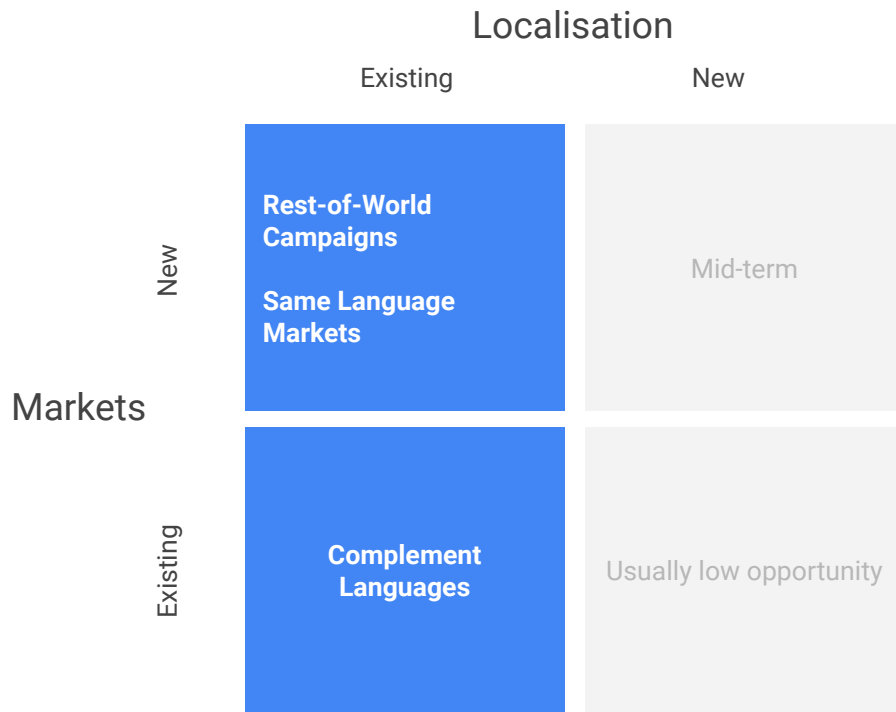Find growth & performance opportunities by comparing the Google product split

Dive into KPI details to spot international low hanging fruits (check out page 2!)

Google Partners

Additional Language Opportunities

Additional Language can be an easy opportunity to expand

Localisation

	Existing	New
New	**Rest-of-World Campaigns** **Same Language Markets**	Mid-term
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Markets

Google Partners

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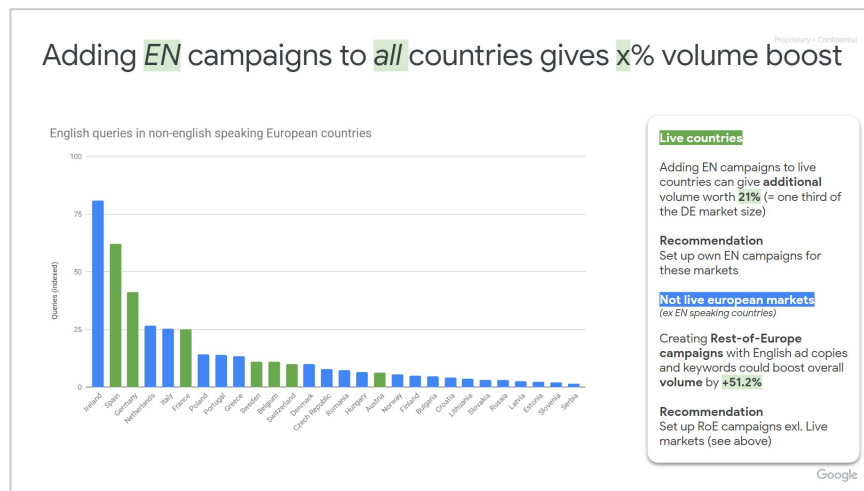Language split info for vertical (MarketExplorer)

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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.

Proprietary + Confidential

Adding *EN* campaigns to *all* countries gives x% 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)

Recommendation
Set up own EN campaigns for these markets

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 RoE campaigns exl. Live markets (see above)

Google

Tools	MarketExplorer Google Analytics

Google Partners

All approaches can be combined to form a cohesive pitch

Conversation Starter & Hook

Investment vs. Market Size

Investment Gap in Market X recognized

Where is potential to grow?

PLA vs. Text Ads

GDN vs. Search vs. YT

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International Growth Strategy

Google Partners

Tip: Check out your International Growth Playbook for Slide Templates
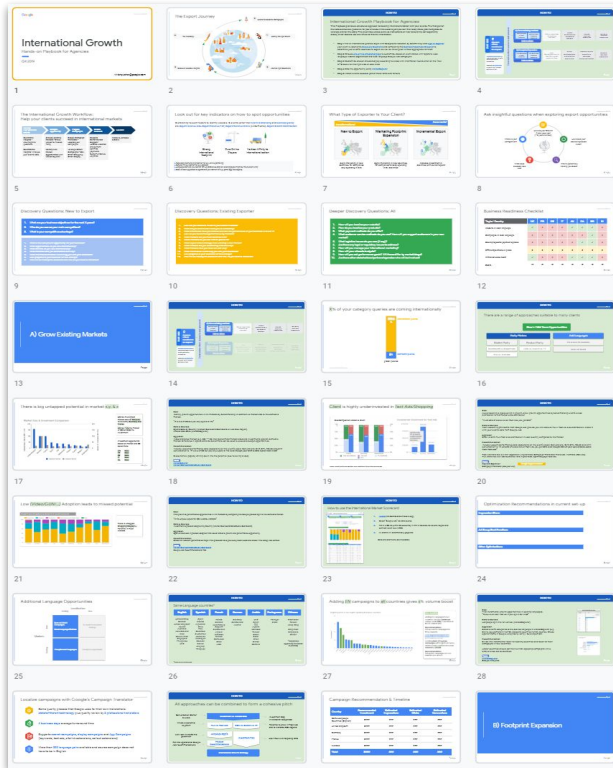
This [Playbook](#) provides a **structured approach to tackling internationalization** with agency clients.

1. The first part of the deck serves as a **guideline**
2. In the second part ready made **pitch templates** to leverage and tell the story can be found

The green/blue slides serve as instructions on how to build the corresponding slides, which tools to use and where to find the information.

Data Sources: [MarketExplorer](#), [International Market Scorecard](#), Google Analytics, Google internal Data

Google

Thank you